



# Commercial Accommodation Monitor: November 2018

Marlborough

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## Preface

Commercial Accommodation Monitor: November 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](http://www.stats.govt.nz)).

The December 2018 monitor will be released on 18 February 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 November 2018 compared with November 2017:

- Guest nights fell 1.7 percent to 65,011
- International guest nights fell 8.3 percent to 29,538
- Domestic guest nights rose 4.5 percent to 35,472
- The average length of stay fell from 1.89 nights to 1.77 nights
- The overall occupancy rate rose from 43.7 percent to 44.0 percent
- The occupancy rate, excluding holiday parks, was 56.9 percent in November 2018
- Accommodation capacity, excluding holiday parks, fell 8.5 percent.

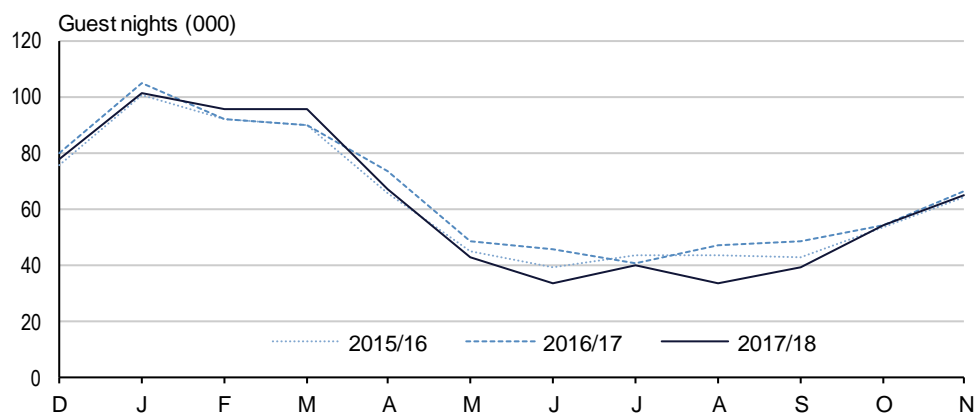
## Response rates for November 2018

The response rate for the Marlborough RTO area was 87 percent for November 2018.

The proportion of the origin-of-guest estimate from unadjusted data was 78 percent.

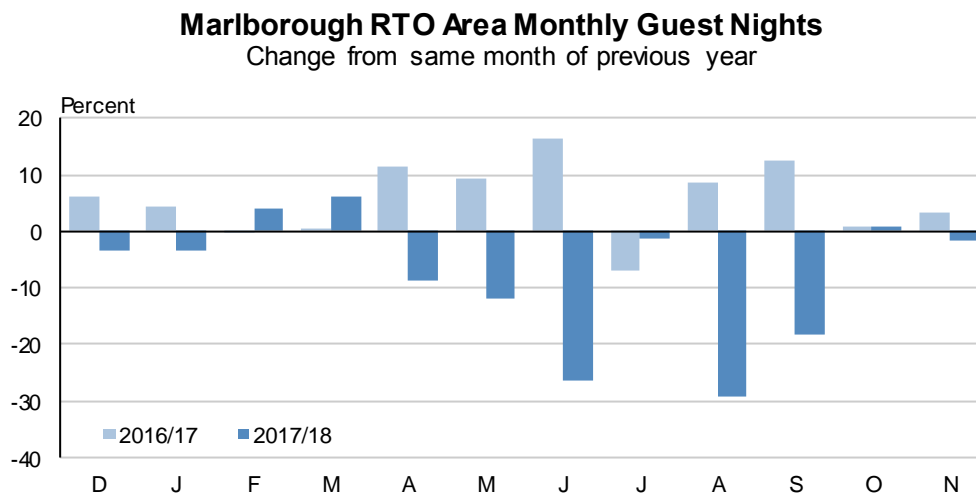
Figure 1.1

### Marlborough RTO Area Monthly Guest Nights



Source: Stats NZ

Figure 1.2



Source: Stats NZ

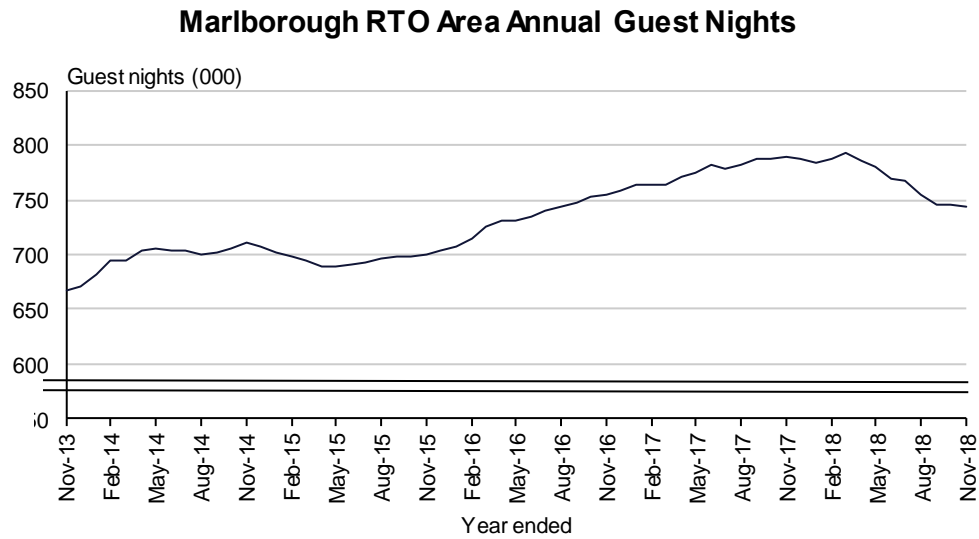
## Year ended highlights

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

- Guest nights fell 5.7 percent to 744,605
- International guest nights fell 13.6 percent to 302,904
- Domestic guest nights rose 0.5 percent to 441,702
- The average length of stay fell from 1.97 nights to 1.84 nights
- The overall occupancy rate fell from 42.5 percent to 40.7 percent
- The occupancy rate, excluding holiday parks, was 51.5 percent for the year ended November 2018
- Accommodation capacity, excluding holiday parks, fell 5.6 percent.

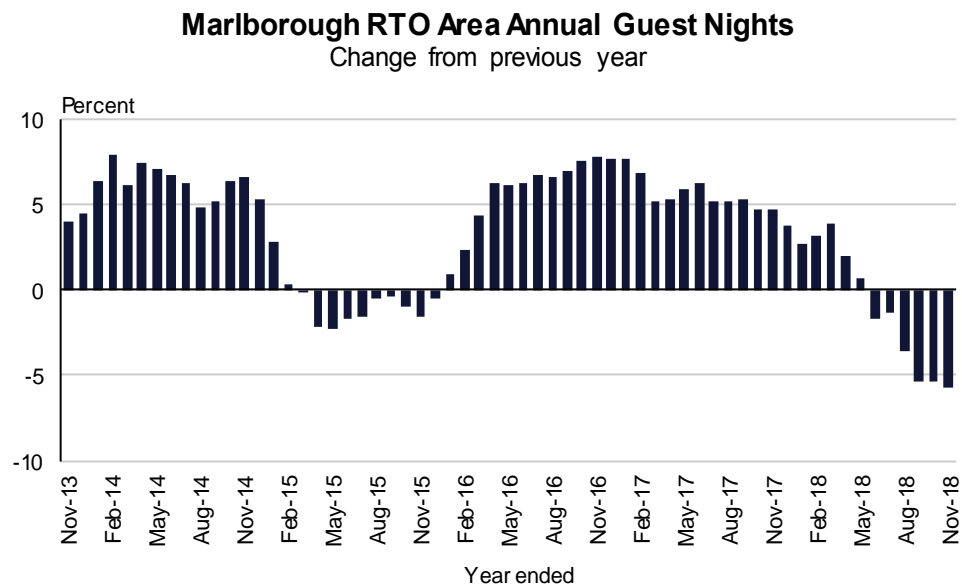


Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

## 2 Accommodation variables

In November 2018, compared with November 2017, there was a decrease of 1.7 percent in total guest nights for the Marlborough RTO area. Backpackers had the only decrease. Holiday parks had the largest increase, followed by motels.

For the year ended November 2018, compared with the previous November year, total guest nights for the Marlborough RTO area decreased 5.7 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<sup>(1)(2)</sup>*

Accommodation type	Monthly			Annual		
	November		Percentage change	Year ended		Percentage change
	2017	2018		November 2017	November 2018	
Guest nights						
Total guest nights	66,141	65,011	-1.7	789,935	744,605	-5.7
International	32,199	29,538	-8.3	350,511	302,904	-13.6
Domestic	33,942	35,472	4.5	439,424	441,702	0.5
Hotels	9,108	9,791	7.5	109,710	107,592	-1.9
Motels/apartments	26,599	28,311	6.4	320,013	320,425	0.1
Backpackers	15,890	10,449	-34.2	168,858	117,238	-30.6
Holiday parks	14,544	16,460	13.2	191,354	199,350	4.2
Occupancy rates <sup>(3)</sup> (%)						
Hotels	61.3	60.1	-2.0	56.9	52.4	-7.9
Motels/apartments	70.1	69.7	-0.6	65.1	62.2	-4.6
Backpackers	44.2	40.7	-7.9	42.4	38.8	-8.5
Holiday parks	20.9	24.3	16.3	23.4	24.0	2.8
Total	43.7	44.0	0.7	42.5	40.7	-4.2
Total excluding holiday parks <sup>(4)</sup>	57.4	56.9	-0.9	54.0	51.5	-4.7
Average length of stay <sup>(5)</sup>						
Hotels	1.51	1.45	-3.9	1.66	1.46	-12.3
Motels/apartments	1.97	1.81	-7.8	1.93	1.82	-5.8
Backpackers	2.03	1.96	-3.6	2.20	2.21	0.4
Holiday parks	1.91	1.83	-4.4	2.07	1.95	-6.2
Total	1.89	1.77	-6.3	1.97	1.84	-6.8
Guest arrivals						
Hotels	6,050	6,765	11.8	66,067	73,858	11.8
Motels/apartments	13,529	15,624	15.5	165,532	175,898	6.3
Backpackers	7,834	5,344	-31.8	76,745	53,079	-30.8
Holiday parks	7,600	8,995	18.4	92,317	102,489	11.0
Total	35,013	36,727	4.9	400,661	405,324	1.2
Establishments						
Hotels	14	14	0.0	14	14	0.0
Motels/apartments	48	47	-2.1	48	47	-2.1
Backpackers	20	17	-15.0	20	17	-15.0
Holiday parks	16	15	-6.3	16	15	-6.3
Total	98	93	-5.1	98	93	-5.1
Capacity <sup>(6)</sup>						
Hotels	9,510	9,540	0.3	113,346	113,339	0.0
Motels/apartments	23,520	23,520	0.0	279,438	286,954	2.7
Backpackers	25,470	20,460	-19.7	296,652	250,294	-15.6
Holiday parks	34,950	34,740	-0.6	413,729	419,537	1.4
Total	93,450	88,260	-5.6	1,103,165	1,070,124	-3.0

(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 November 2018, international guests accounted for 45.4 percent of all guest nights in the Marlborough RTO area. When compared with November 2017, the number of international guest nights spent in the area in November 2018 was down 8.3 percent to 29,538. Domestic guest nights increased 4.5 percent, to 35,472, for the same period.

The proportion of the origin-of-guest estimate from actual data was 78 percent for November 2018.

Figure 3.1

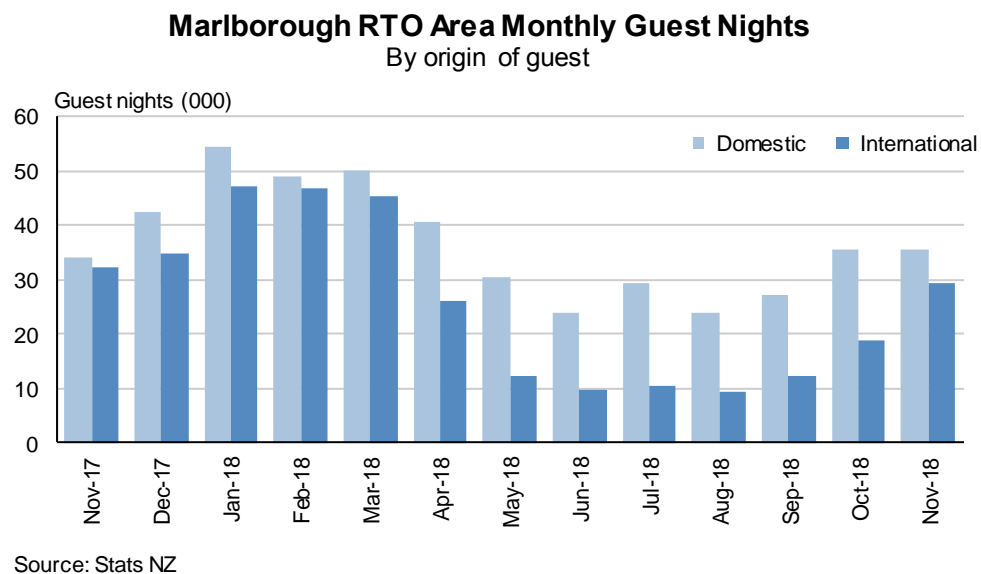


Table 3.1

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

		Marlborough RTO <sup>(1)</sup> area			New Zealand		
		Origin of guest		Total	Origin of guest		Total
		Domestic	International		Domestic	International	
Month							
2017	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
	Nov	35,472	29,538	65,011	1,804,941	1,730,166	3,535,107
Percent change from the current month of the previous year							
		4.5	-8.3	-1.7	4.2	3.4	3.8
Year ended							
November 2017		439,424	350,511	789,935	22,179,367	17,126,694	39,306,061
November 2018		441,702	302,904	744,605	22,703,390	17,606,722	40,310,112
Percent change from previous year							
		0.5	-13.6	-5.7	2.4	2.8	2.6

(1) Regional tourism organisation

## 4 National results

In November 2018, a total of 3,535,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 129,000 nights (3.8 percent) from November 2017. Both the North Island (up 43,000 or 2.2 percent) and South Island (up 86,000 or 6.1 percent) recorded an increase.

All four accommodation types recorded an increase in guest nights in November 2018, compared with November 2017. Hotels had the largest increase in guest nights (up 58,000 or 4.6 percent), followed by holiday parks (up 42,000 or 7.2 percent), motels (up 29,000 or 2.7 percent), and backpackers (up 1,000 or 0.1 percent).

For the year ended November 2018, there were 40,310,000 guest nights, an increase of 1,004,000 (2.55 percent) from the previous November year.

Refer to Table 4.1 for comparisons of data.

Table 4.1

<b>Marlborough and New Zealand Guest Nights</b>					
<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
<b>November month</b>					
<b>Marlborough RTO area</b>					
Hotels	8,854	9,108	9,791	2.9	7.5
Motels	25,967	26,599	28,311	2.4	6.4
Backpackers	16,177	15,890	10,449	-1.8	-34.2
Holiday parks	13,097	14,544	16,460	11.0	13.2
Total	64,095	66,141	65,011	3.2	-1.7
<b>New Zealand</b>					
Hotels	1,192,202	1,242,438	1,300,029	4.2	4.6
Motels	1,061,386	1,079,835	1,108,936	1.7	2.7
Backpackers	461,411	495,239	495,862	7.3	0.1
Holiday parks	550,113	588,171	630,280	6.9	7.2
Total	3,265,113	3,405,683	3,535,107	4.3	3.8
<b>Year ended November</b>					
<b>Marlborough RTO area</b>					
Hotels	C	109,710	107,592	C	-1.9
Motels	275,389	320,013	320,425	16.2	0.1
Backpackers	198,864	168,858	117,238	-15.1	-30.6
Holiday parks	C	191,354	199,350	C	4.2
Total	754,103	789,935	744,605	4.8	-5.7
<b>New Zealand</b>					
Hotels	13,578,684	13,866,631	14,417,527	2.1	4.0
Motels	12,073,813	12,349,572	12,464,385	2.3	0.9
Backpackers	5,155,700	5,205,231	5,084,955	1.0	-2.3
Holiday parks	7,561,239	7,884,627	8,343,245	4.3	5.8
Total	38,369,437	39,306,061	40,310,112	2.4	2.6

## 5 Regional comparison

In November 2018, Auckland recorded the largest increase in guest nights (up 36,000 or 5.4 percent) from November 2017. This was followed by Queenstown (up 31,000 or 10.4 percent), Canterbury (up 28,000 or 8.4 percent), Wanaka (up 10,000 or 13.8 percent), and Mackenzie (up 9,000 or 12.2 percent).

Nelson-Tasman recorded the largest decrease (down 7,000 or 5.5 percent), followed by Hurunui (down 4,000 or 12.9 percent), Bay of Plenty (down 3,000 or 3.6 percent), Waikato (down 3,000 or 2.5 percent), and Gisborne (down 3,000 or 8.7 percent).

Table 5.1

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

RTO area	November guest nights								
	Domestic			International			Total		
	2017	2018	Percent age change	2017	2018	Percent age change	2017	2018	Percent age change
Northland	81,031	89,919	11.0	69,715	64,612	-7.3	150,746	154,530	2.5
Auckland	328,045	358,680	9.3	331,848	336,928	1.5	659,894	695,608	5.4
Coromandel	45,716	43,872	-4.0	29,605	29,350	-0.9	75,320	73,223	-2.8
Waikato	87,262	88,309	1.2	39,447	35,173	-10.8	126,708	123,482	-2.5
Bay of Plenty	61,131	59,460	-2.7	33,242	31,518	-5.2	94,373	90,977	-3.6
Rotorua	91,344	96,691	5.9	113,282	107,681	-4.9	204,626	204,371	-0.1
Taupo	55,349	53,043	-4.2	40,432	40,220	-0.5	95,781	93,263	-2.6
Whakatane-Kawerau	14,215	15,137	6.5	5,592	5,920	5.9	19,808	21,057	6.3
Gisborne	22,933	21,822	-4.8	6,109	4,695	-23.1	29,042	26,517	-8.7
Taranaki	42,311	44,034	4.1	12,518	10,764	-14.0	54,829	54,798	-0.1
Hawke's Bay	66,045	68,602	3.9	34,327	32,053	-6.6	100,371	100,655	0.3
Ruapehu	18,141	21,234	17.0	18,235	19,259	5.6	36,376	40,492	11.3
Manawatu	35,912	41,724	16.2	8,080	6,673	-17.4	43,991	48,397	10.0
Whanganui	12,178	13,308	9.3	4,212	5,155	22.4	16,390	18,463	12.7
Wairarapa	14,122	18,637	32.0	4,322	3,267	-24.4	18,444	21,904	18.8
Kapiti-Horowhenua	16,461	18,854	14.5	3,546	4,450	25.5	20,007	23,304	16.5
Wellington	152,085	157,566	3.6	89,803	83,130	-7.4	241,888	240,695	-0.5
Marlborough	33,942	35,472	4.5	32,199	29,538	-8.3	66,141	65,011	-1.7
Nelson-Tasman	60,568	60,025	-0.9	60,736	54,653	-10.0	121,303	114,678	-5.5
Canterbury	171,966	163,553	-4.9	157,386	193,434	22.9	329,353	356,986	8.4
Hurunui	20,064	16,934	-15.6	11,482	10,553	-8.1	31,546	27,488	-12.9
Mackenzie	18,723	18,008	-3.8	54,416	64,074	17.7	73,139	82,082	12.2
Timaru	17,830	17,889	0.3	8,145	8,784	7.8	25,976	26,673	2.7
West Coast	39,445	37,595	-4.7	97,331	102,538	5.3	136,776	140,133	2.5
Wanaka	23,382	24,045	2.8	47,078	56,136	19.2	70,460	80,181	13.8
Queenstown	80,258	96,305	20.0	221,621	236,851	6.9	301,879	333,156	10.4
Waitaki	17,547	17,534	-0.1	17,192	20,331	18.3	34,740	37,866	9.0
Central Otago	15,598	16,811	7.8	5,374	7,187	33.7	20,972	23,998	14.4
Dunedin	42,267	47,152	11.6	39,122	37,021	-5.4	81,389	84,173	3.4
Clutha	3,918	4,308	10.0	2,596	3,424	31.9	6,514	7,733	18.7
Fiordland	17,845	15,747	-11.8	59,084	66,798	13.1	76,929	82,545	7.3
Southland	24,505	22,670	-7.5	15,468	17,995	16.3	39,973	40,665	1.7
<b>Total</b>	<b>1,732,137</b>	<b>1,804,941</b>	<b>4.2</b>	<b>1,673,546</b>	<b>1,730,166</b>	<b>3.4</b>	<b>3,405,683</b>	<b>3,535,107</b>	<b>3.8</b>



Table 5.2

**Regional Tourism Organisation Areas' Monthly Occupancy Rates<sup>(1)</sup>***By accommodation type*

RTO area	November 2018 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks <sup>(2)</sup>
	Percent					
Northland	53.9	63.4	44.8	15.9	31.1	55.0
Auckland	88.6	74.6	70.9	22.2	74.5	81.6
Coromandel	51.9	51.2	32.0	18.0	25.6	43.3
Waikato	71.6	71.8	43.7	18.6	47.6	64.7
Bay of Plenty	58.5	62.1	52.1	21.9	39.5	57.4
Rotorua	84.1	74.2	36.4	28.9	55.8	63.1
Taupo	63.0	61.1	48.4	21.5	45.5	56.6
Whakatane-Kawerau	C	61.5	C	10.0	20.6	55.6
Gisborne	C	64.8	C	7.8	24.0	59.1
Taranaki	58.2	62.0	37.2	18.0	40.7	55.7
Hawke's Bay	73.6	73.8	63.9	20.6	50.8	71.2
Ruaapehu	52.2	39.7	23.3	36.1	34.4	34.1
Manawatu	46.2	64.0	C	C	43.8	C
Whanganui	C	59.4	59.3	C	39.1	C
Wairarapa	C	59.4	C	14.3	30.7	53.3
Kapiti-Horowhenua	C	67.0	C	17.6	24.3	31.8
Wellington	85.4	78.7	C	C	72.9	C
Marlborough	60.1	69.7	40.7	24.3	44.0	56.9
Nelson-Tasman	60.7	64.4	53.5	14.4	34.9	59.0
Canterbury	77.5	72.2	44.5	23.8	51.5	65.0
Hurunui	C	49.0	C	18.9	29.8	39.2
Mackenzie	C	62.1	C	41.5	63.2	74.3
Timaru	C	66.9	C	20.8	36.8	58.9
West Coast	58.1	66.7	41.7	31.0	48.2	55.2
Wanaka	73.0	81.4	76.6	25.9	49.6	76.6
Queenstown	86.3	71.6	76.5	43.3	75.2	80.2
Waitaki	52.4	70.3	35.4	5.6	16.0	57.4
Central Otago	25.0	67.3	22.7	6.9	15.5	41.8
Dunedin	73.7	75.9	42.5	35.8	61.0	67.6
Clutha	C	52.8	C	21.1	29.1	36.7
Fiordland	74.3	75.8	56.0	47.6	60.0	67.1
Southland	44.5	58.4	39.2	20.9	39.9	48.4
<b>Total</b>	<b>77.0</b>	<b>68.1</b>	<b>51.0</b>	<b>19.7</b>	<b>49.3</b>	<b>66.2</b>

(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](http://www.stats.govt.nz/browse_for_stats/industry_sectors/accommodation.aspx)