



restaurant  
association  
of new zealand

# Hospitality Report

Topline Statistics for Aotearoa's  
Hospitality Industry

PRODUCED BY THE RESTAURANT  
ASSOCIATION OF NEW ZEALAND



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# \$15.7B

Annual sales for the year ended March 2024 reached \$15.7 billion, reflecting national sales growth of 5.8 per cent over the previous year. Notably over this period menu pricing grew by 6.4 per cent, operational costs increased significantly in key areas and inflation overall was 4 per cent, indicating sales growth lags behind cost increases.

# \$7.8B

The restaurant and cafe sector recorded sales growth of 4.6 per cent in 2024, reaching \$7.8 billion in annual sales (and posting sales \$344 million more than 2023).

# 20.6%

Despite the challenges in 2023 in the aftermath of the country's devastating weather events, in 2024 (year end March) the Gisborne region recorded the largest percentage sales growth over the previous year. Annual sales for the region are \$127.4 million

# -2.6%

Three regions recorded sales declines over the period 2023-2024. Sales for Taranaki were down 2.6 per cent, with Wellington and Northland recording small declines; -0.83 per cent and -0.81 per cent respectively.

# \$6.2B

Although cost of living pressures continue to impact the hospitality sector in our largest region, Auckland still recorded sales of \$6.2 billion in 2024 (year ended March). This reflects sales growth of 7.2 per cent.

# 19.4%

The catering sector, which through the Covid-19 pandemic was decimated by the cancellation of events and functions, posted the largest percentage sales increase for the industry compared to 2023. Sales for this sector grew 19.4 per cent (for the year ended March 2024).

# 19.5k

For the year ended February 2023, there were 19,518 hospitality outlets around New Zealand. This reflects an overall increase of just 27 outlets over the year previous.

# 0.14%

Overall outlet growth for the industry over the period 2022-2023 was a minimal 0.1 per cent. By sector, only the Takeaway / Food to Go sector recorded an increase in outlets, of 1.6 per cent, over that period. The restaurant and cafe sector declined by 0.1 per cent.

# 10.9%

Many regions saw either minimal outlet growth, or a decline in the number of outlets (for year ended February 2023). The region that achieved the largest increase in outlet numbers was Marlborough, with 10.9 per cent growth.

# 145k

145,000 employees work in the hospitality industry. Employee growth across the industry was 7.3 per cent from 2022-2023. This is a growth rate that far exceeds the growth in outlets over the same period.

# 81.2k

The dominant Cafe & Restaurant sector has more than 81,200 employees, recording a 5.9 per cent increase in employee numbers from 2022-2023.

# 28.6%

The number of employees in the Queenstown-Lakes region increased by 28.6 per cent from 2022-2023. The number of employees in the region grew from 2800 in 2022, to 3600 employees in 2023. The Manawatū-Whanganui region was the only region to record a decline in employee numbers (of -5.17 per cent).



A close-up, profile view of a woman with dark hair tied back, smiling warmly. She is wearing a white long-sleeved shirt under a grey apron. She is holding a black tablet with both hands, looking at it with a pleasant expression. The background is softly blurred, showing what appears to be an indoor setting with warm lighting.

# INTRODUCTION

Our latest Hospitality Report highlights the industry's mixed results, with the positive impact of returning international tourists offset by challenges such as extreme weather, cost pressures and customer downturn.

## Kia ora koutou.

Our 2024 Hospitality Report examines the period ending March 2024, during which the industry achieved sales of \$15.7 billion. While it is positive to see sales in the industry continue to grow, the period has been characterized as one of mixed results. Despite the 5.8 per cent annual growth, many operators report facing some of the most challenging times over the past 12 months. It is important to note that inflation grew by 4 per cent over the same period and there were significant increases in key operational costs. Additionally, in response to these challenges menu pricing was adjusted by 6.4 per cent over the period which further tempers the perceived growth. Overall these factors indicate that our growth is lagging and this is a further erosion of profitability for the industry.

Initially, the year under review held promise, with some businesses and regions experiencing strong customer trade. However, the year has also been marked by a perfect storm of challenges, including the aftermath of the extreme weather events at the start of 2023 which hindered access to some North Island regions, including Northland and Hawke's Bay, halted tourism, and created food supply issues and price increases. To highlight the ongoing struggle, sales growth from Q2 to Q3 of 2023 was a subdued 2.3 per cent, compared to 7.8 per cent growth in the same period of 2022.

Winter 2023 struggles are highlighted by subdued sales growth - just 2.3 per cent from the 2nd quarter to the 3rd quarter of 2023.

In addition, by mid 2023 operators were beginning

to report on the impact cost of living pressures were having on customer behaviours. This has continued through 2024, with *managing the customer downturn* being cited as the number one challenge for hospitality, according to Restaurant Association member survey insights.

Winter 2023 also proved to be more challenging than expected and the Restaurant Association was focused on supporting members through the period. This included providing emergency response support, launching the Cooking up a Storm campaign that raised more than \$350,000, and introducing regional training initiatives.

As a result, the weather events, coupled with food cost increases, declining customer traffic and spend, rising wage costs, cost of living pressures, and election year uncertainties, impacted overall industry productivity and profitability. However, a positive aspect amidst these challenges was the return of international tourists, who were strong contributors to trade over the Summer 2024 season.

To address some of the current challenges, we have seen business owners focused on operating as leanly as possible and employing strategies to attract customers into their businesses. With food pricing fluctuations, many owners remark on the need to be vigilant in managing food cost changes. The industry has also responded to rising costs by adjusting menu pricing. Restaurant meals rose by 6.4 per cent in the year ended March 2024.

Regionally, three regions - Northland, Taranaki, and Wellington - recorded annual sales declines in 2024, driven by specific local challenges. Conversely, Gisborne recorded the highest percentage growth, at 20.6 per cent, with Southern Lakes, West Coast South Island, and Kaikōura also showing strong sales improvement, attributed in part to the return of international tourism.

**“While the industry is expected to remain in a subdued trading environment for the remainder of 2024, operators are prepared to navigate the year with a lean approach and an eye on 2025. The Restaurant Association will be with them each step of the way.”**

There are more hospitality operations than ever before, however growth is minimal, reflecting a tightening of the market.

The number of hospitality operations nationwide rose to 19,518. However this reflects minimal outlet growth of just 0.1% from 2022 to 2023 (the latest available reporting period).

All sectors recorded either no growth, or small declines in the number of outlets, with the exception of the Takeaway foodservices sector which recorded a minimal 1.6 percent increase in the number of operations.

In contrast to the minimal change in outlet numbers, employee numbers, were 7.3 percent higher in 2023 compared to 2022. The hospitality industry now employs 145,000 people, making it the country's 7th largest employer. The growth has been buoyed by the return of international workers to Aotearoa and positively operators report an easing of some of the staffing challenges that

peaked in 2022. However, the industry continues to face skilled employee shortages for specific roles, in particular senior chefs and senior front of house roles, including restaurant managers.

To support the development of the industry, the Association continues to use the Future of Hospitality Roadmap, first developed in 2021, to support the sector. Focus areas include *workforce development, economic strategies, customer attraction, industry digital transformation and technology adoption, new business models, and business preparedness in the face of future instability*. The Roadmap is under continuous review, evolving over the three years since its introduction. The Association continues to actively use its guiding principles to shape our activities and initiatives, ensuring they align with the industry's needs and future growth. A high level update and progress report on the Future of Hospitality Roadmap has been provided in this report.



Our industry's typically optimistic viewpoint has been temporarily shaken. Alarming, according to 2024 Restaurant Association member insights, 31 per cent of businesses nationwide believe that conditions will deteriorate over the next year. Business closures, including a number of established and high-profile stalwarts, serve as stark reminders of the challenges currently confronting the hospitality sector.

However, despite the tough times, together, we can navigate these times and look forward to a brighter future. We are focused on supporting in the areas that will help members plan and succeed. While the industry is expected to remain in a subdued trading environment for the remainder of 2024, operators are still showing extraordinary determination, prepared to navigate the year with a lean approach and an eye on 2025.

Despite the challenges of the past four years, the industry remains determined and resilient. Once cost of living pressures ease, customer behaviours will follow, and the hospitality sector is ready to welcome people back into our venues. Our industry will thrive again.

**Marisa Bidois**  
CEO, Restaurant Association  
of New Zealand





# SALES DATA

Sales growth in 2024, saw stronger performances in the Café, Restaurant, Catering, and Takeaway sectors, but minimal gains in Pubs, and mixed regional results, all tempered by rising costs impacting profitability.

## Industry sales figures for the full year from April 2023 – March 2024 increased to \$15.7 billion – growing 5.8 per cent over the year.

Sales growth in 2024 carried across the industry but was tempered by rising costs.

The Catering sector has continued to bounce back to record a 19.4 per cent sales increase over the period under review. In 2024, this sector recorded the largest percentage gain. In addition, annual sales for our dominant Café and Restaurant sector, which has 49 per cent market share, grew by 4.6 per cent in the year ended March 2024. Sales in Restaurants and Cafes are \$7.8 billion, with growth in dollar terms translating to an increase of \$344 million from the year previous. Takeaway foodservice also again realised strong annual sales growth. This sector posted over \$4.2 billion in annual sales (year ended March 2024), recording 7.1 per cent growth. In contrast, Pubs, taverns and bars have been in decline since the 3rd quarter of 2023 and overall recorded just 0.8 per cent growth in 2024.

**The Café and Restaurant sector, holding 49% market share, saw a 4.6% sales increase, adding \$344 million in revenue.**

Quarterly analysis of the industry shows sales revenue for the industry peaking in the December 2023 quarter to \$4.1 billion. This is 4.2 per cent higher than the 4th quarter of 2022. In this period the Catering sector recorded 10.5 per cent growth over the previous year.

The Café and Restaurant sector also saw a 4.4 per cent increase in trade in the 1st quarter of 2024, compared to the same quarter a year previous, while the Takeaway sector's sales growth for the period was slightly higher at 6.0 per cent and Clubs recorded an 11.3 per cent increase in comparison to January – March 2023.

**The Gisborne region led regional growth with 20.6% annual growth, driven by a 41.8% sales jump in Q4 2023.**

When considering regional sales growth for the full 2024 year (year end March 2024), consumer spending remains highest in Auckland, Wellington, Canterbury and Waikato. These regions all have annual sales of more than \$1 billion per annum, with Auckland exceeding \$6 billion in annual sales for the first time in 2024. Each region sustained sales revenue growth in 2024 compared to 2023, with the exception of three regions. These three regions saw revenue decrease for the year, with Northland and Wellington down 0.8 per cent respectively and Taranaki down 2.6 per cent.

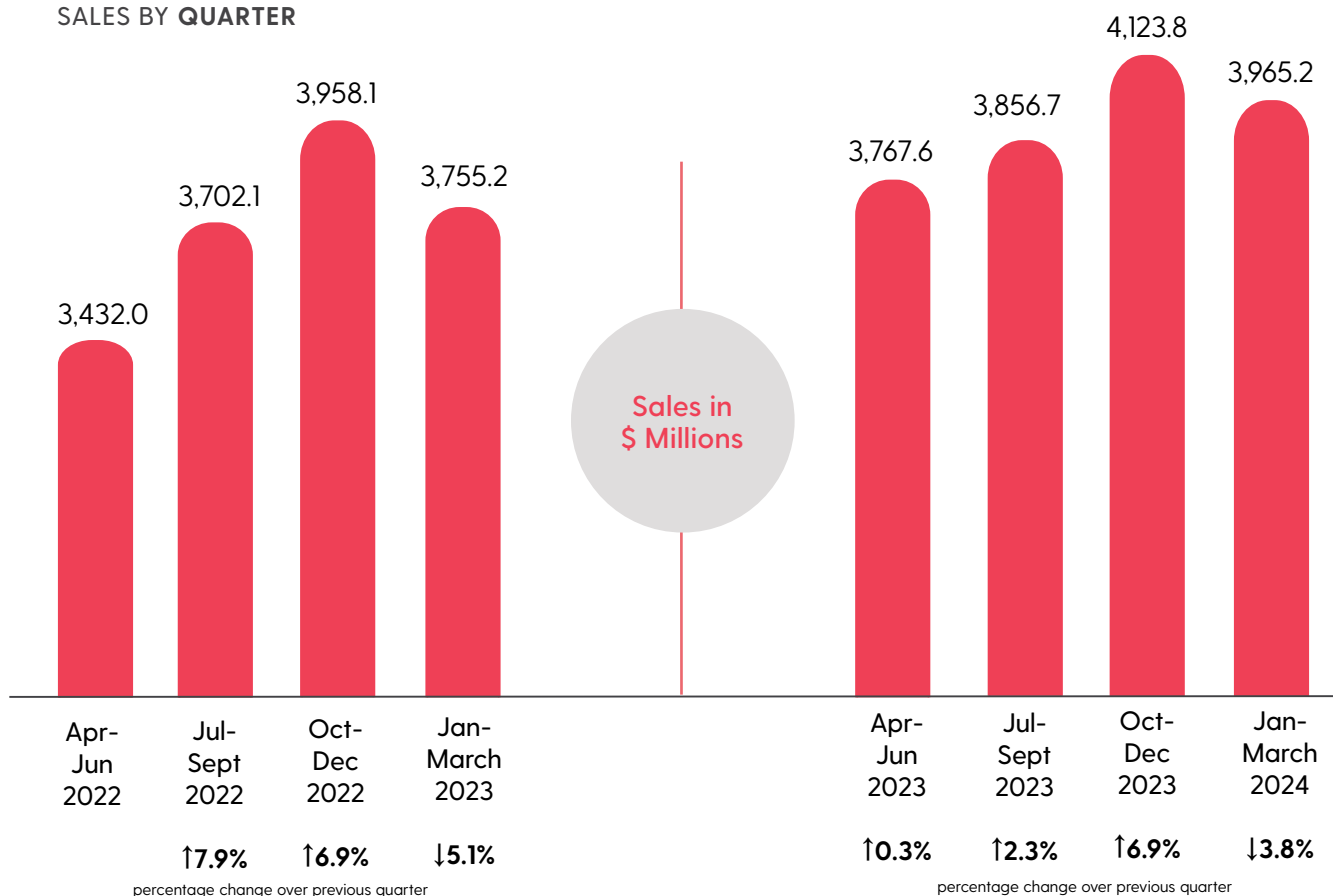
Regional sales growth ranged from 2.6 per cent in the Bay of Plenty region, 9.0 per cent in Canterbury, and 7.2 per cent in Wellington.

In 2024 the Gisborne region had the largest percentage sales growth, at 20.6 per cent annual growth. This was driven by a jump in sales in the 4th quarter of 2023 – more than 41.8 per cent higher than the same quarter a year previous. Southern Lakes and West Coast (South Island) also experienced strong growth – of 15.3 per cent and 13.9 per cent respectively.

While it is positive that the industry continues to record an increase in sales, some of this reflects the industry's pricing increases and the growth is also tempered by the increase in costs felt across the board this year, which is keeping profit at marginal levels. However, as the industry continues to increase sales despite rising costs, the resilience and adaptability demonstrated by various sectors and regions offer a positive outlook for future growth and stability.

## Quarterly Sales Data national

SALES BY QUARTER



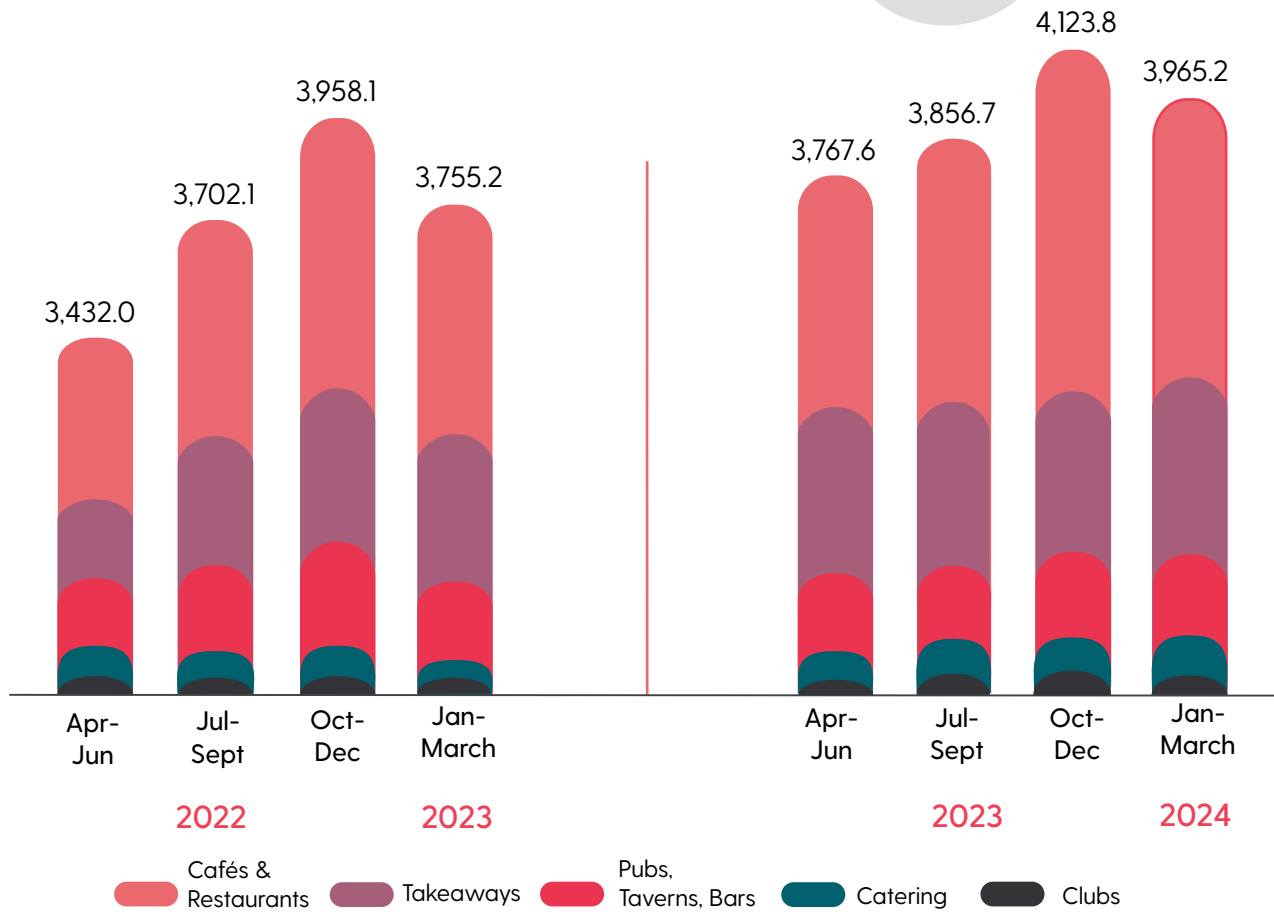
## Industry Sales national snapshot

PERCENTAGE CHANGE BY QUARTER vs year previous



# Quarterly Sales Data by sector

SALES BY QUARTER

Sector sales  
in \$ Millions

## Quarterly Sector Sales 2023

|                                    | \$ MILLIONS    |                |            |                |                |            |                |                |            |                |                |            |
|------------------------------------|----------------|----------------|------------|----------------|----------------|------------|----------------|----------------|------------|----------------|----------------|------------|
| Food and Beverage Services Sectors | Q2 22          | Q2 23          | % change   | Q3 22          | Q3 23          | % change   | Q4 22          | Q4 23          | % change   | Q1 23          | Q1 24          | % change   |
| ■ Cafés and restaurants            | 1,725.6        | 1,860.9        | 7.8        | 1,834.6        | 1,889.7        | 3.0        | 1,970.3        | 2,040.9        | 3.6        | 1,897.7        | 1,981.0        | 4.4        |
| ■ Takeaway food services           | 930.3          | 1,016.9        | 9.3        | 992.8          | 1,049.2        | 5.7        | 1,040.9        | 1,118.0        | 7.4        | 974.5          | 1,033.1        | 6.0        |
| ■ Catering services                | 227.0          | 299.2          | 31.8       | 265.8          | 316.7          | 19.1       | 287.6          | 317.7          | 10.5       | 272.6          | 323.6          | 18.7       |
| ■ Pubs, taverns and bars           | 453.4          | 481.8          | 6.3        | 500.9          | 493.6          | -1.5       | 549.8          | 538.4          | -2.1       | 510.9          | 516.6          | 1.1        |
| ■ Clubs (hospitality)              | 95.8           | 108.8          | 13.6       | 108.1          | 107.5          | -0.6       | 109.5          | 108.8          | -0.6       | 99.6           | 110.9          | 11.3       |
| <b>Total New Zealand</b>           | <b>3,432.0</b> | <b>3,767.6</b> | <b>9.8</b> | <b>3,702.1</b> | <b>3,856.7</b> | <b>4.2</b> | <b>3,958.1</b> | <b>4,123.8</b> | <b>4.2</b> | <b>3,755.2</b> | <b>3,965.2</b> | <b>5.6</b> |

## Regional Sales by Quarter

| Region                         | \$ MILLIONS    |                |            |                |                |            |                |                |            |                |                |            |
|--------------------------------|----------------|----------------|------------|----------------|----------------|------------|----------------|----------------|------------|----------------|----------------|------------|
|                                | Q2 22          | Q2 23          | % change   | Q3 22          | Q3 23          | % change   | Q4 22          | Q4 23          | % change   | Q1 23          | Q1 24          | % change   |
| Northland Region               | 89.6           | 90.2           | 0.7        | 88.8           | 85.4           | -3.8       | 96.7           | 94.4           | -2.4       | 95             | 97.1           | 2.2        |
| Auckland Region                | 1,338.8        | 1,475.9        | 10.2       | 1,462.6        | 1,542.1        | 5.4        | 1,544.9        | 1,647.5        | 6.6        | 1,441.1        | 1,539.4        | 6.8        |
| Waikato Region                 | 286.3          | 323.0          | 12.8       | 295.2          | 308.0          | 4.3        | 315.9          | 314.5          | -0.4       | 303.9          | 313.9          | 3.3        |
| Bay of Plenty Region           | 205.1          | 217.8          | 6.2        | 210.6          | 214.8          | 2.0        | 226.9          | 229.6          | 1.2        | 219.8          | 223            | 1.5        |
| Gisborne Region                | 25.1           | 30.0           | 19.5       | 26.0           | 27.4           | 5.4        | 30.1           | 42.7           | 41.9       | 24.4           | 27.3           | 11.9       |
| Hawke's Bay Region             | 98.7           | 110.5          | 12.0       | 101.8          | 106.1          | 4.2        | 113.4          | 117.6          | 3.7        | 99.2           | 113.3          | 14.2       |
| Taranaki Region                | 64.3           | 55.8           | -13.2      | 61.3           | 62.8           | 2.4        | 66.5           | 65.9           | -0.9       | 62.3           | 63.2           | 1.4        |
| Manawatū-Whanganui Region      | 138.6          | 146.1          | 5.4        | 148.3          | 152.8          | 3.0        | 151.3          | 159.1          | 5.2        | 145            | 149.4          | 3.0        |
| Wellington Region              | 379.2          | 396.8          | 4.6        | 408.6          | 414.4          | 1.4        | 444.6          | 429.8          | -3.3       | 401.1          | 378.9          | -5.5       |
| West Coast Region              | 15.8           | 19.4           | 22.8       | 14.3           | 16.5           | 15.4       | 20             | 22.2           | 11.0       | 23.8           | 26.1           | 9.7        |
| Tasman Region                  | 25.4           | 26.6           | 4.7        | 25.0           | 25.2           | 0.8        | 27             | 28.7           | 6.3        | 31.4           | 32.8           | 4.5        |
| Nelson Region                  | 37.0           | 40.5           | 9.5        | 39.5           | 41.3           | 4.6        | 43.8           | 44             | 0.5        | 44.4           | 46             | 3.6        |
| Marlborough Region             | 29.3           | 31.3           | 6.8        | 27.4           | 27.7           | 1.1        | 30.1           | 32.4           | 7.6        | 34.1           | 39.6           | 16.1       |
| Kaikōura                       | 2.9            | 4.0            | 37.9       | 3.3            | 3.2            | -3.0       | 4.4            | 4.7            | 6.8        | 5.3            | 6.2            | 17.0       |
| Canterbury Region ex. Kaikōura | 405.9          | 462.4          | 13.9       | 450.8          | 468.3          | 3.9        | 487.6          | 517.8          | 6.2        | 462.8          | 521.1          | 12.6       |
| Otago Region ex. Q.town-Lakes  | 109.2          | 120.8          | 10.6       | 115.7          | 122.5          | 5.9        | 123.6          | 127.0          | 2.8        | 121.2          | 129            | 6.4        |
| Queenstown-Lakes               | 73.4           | 95.4           | 30.0       | 109            | 118.1          | 8.3        | 100.3          | 113.2          | 12.9       | 112.9          | 129.4          | 14.6       |
| Southland Region               | 51.2           | 60.2           | 17.6       | 55.4           | 56.3           | 1.6        | 64.7           | 63.6           | -1.70      | 67.4           | 65.9           | -2.2       |
| <b>Total New Zealand</b>       | <b>3,432.0</b> | <b>3,767.6</b> | <b>9.8</b> | <b>3,702.1</b> | <b>3,856.7</b> | <b>9.8</b> | <b>3,958.1</b> | <b>4,123.8</b> | <b>4.2</b> | <b>3,755.2</b> | <b>3,965.2</b> | <b>5.6</b> |

**-3.8%**

The 1st quarter of 2024, compared to the previous quarter, saw industry sales decline by 3.8 per cent.

**31.9%**

The Kaikōura region recorded the largest percentage sales gain from quarter 4, 2023 to the quarter 1, 2024. This region saw 31.9 per cent sales growth for the period.

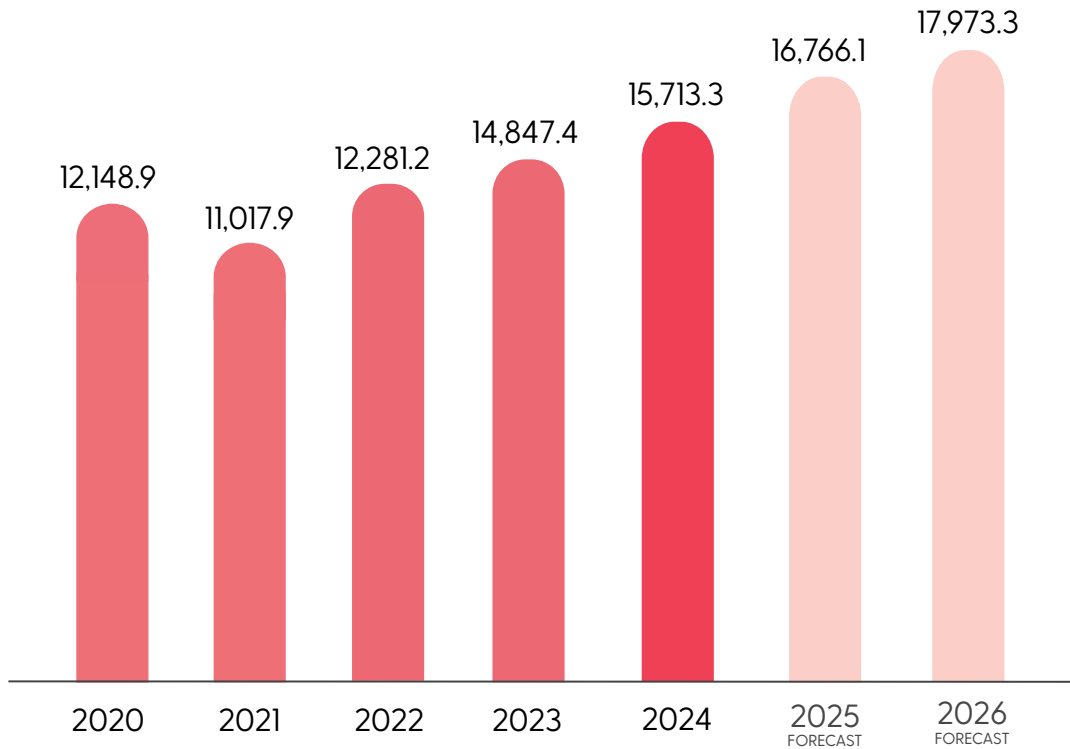
**\$1.54b**

Auckland had the largest overall growth for the 1st quarter of 2024 vs 2023. The region reached sales of \$1539.4 million, which was \$98.3 million more than the same quarter in 2023.

## Annual Industry Sales national

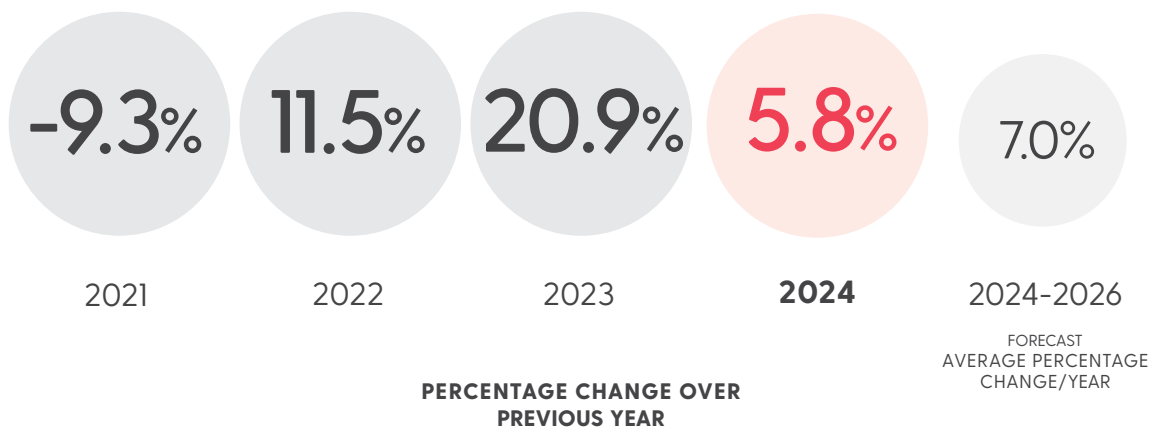
YEARS ENDED MARCH

Sales in  
\$ Millions



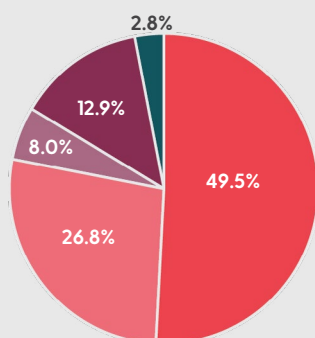
## Sales Growth national

YEARS ENDED MARCH



## Industry Sales by Sector 2020-2024

### Market Share 2024



|                                    | \$ MILLIONS     |                 |                 |                 |                 |
|------------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Food and Beverage Services Sectors | 2020            | 2021            | 2022            | 2023            | 2024            |
| ■ Cafés and restaurants            | 6,196.0         | 5,605.4         | 6,162.7         | 7,428.2         | <b>7,772.5</b>  |
| ■ Takeaway food services           | 2,936.6         | 2,986.6         | 3,490.4         | 3,938.5         | <b>4,217.2</b>  |
| ■ Catering services                | 956.7           | 632.8           | 756.2           | 1,053.0         | <b>1,257.2</b>  |
| ■ Pubs, taverns and bars           | 1,684.3         | 1,481.3         | 1,547.8         | 2,015.0         | <b>2,030.4</b>  |
| ■ Clubs (hospitality)              | 375             | 311.9           | 324.1           | 412.0           | <b>436.0</b>    |
| <b>Total New Zealand</b>           | <b>12,148.9</b> | <b>11,017.9</b> | <b>12,281.2</b> | <b>14,847.4</b> | <b>15,713.3</b> |

## Sector Sales Growth

YEAR ENDED MARCH

PERCENTAGE CHANGE 2023-2024

4.6%

Cafés and  
restaurants

7.1%

Takeaways

19.4%

Catering

0.8%

Pubs, bars  
and taverns

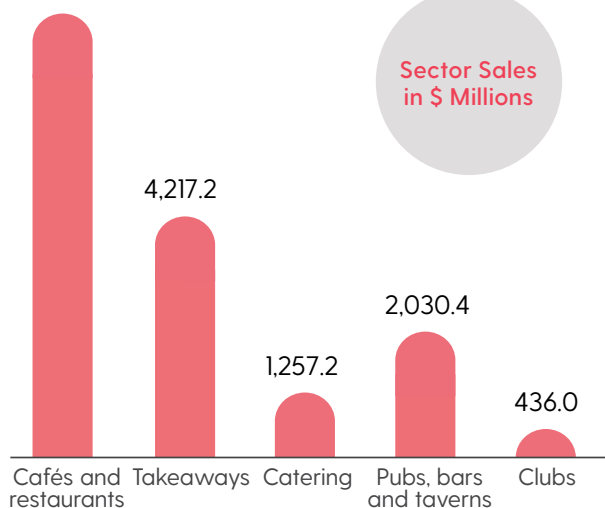
5.8%

Clubs

## Industry Sales by sector 2024

YEAR ENDED MARCH

7,772.5



29.3%

Annual hospitality industry sales have reached record levels. In comparison to the sales revenue generated 5 years prior (for year ended March 2020), 2024 sales are 29.3 per cent higher.

\$7.8b

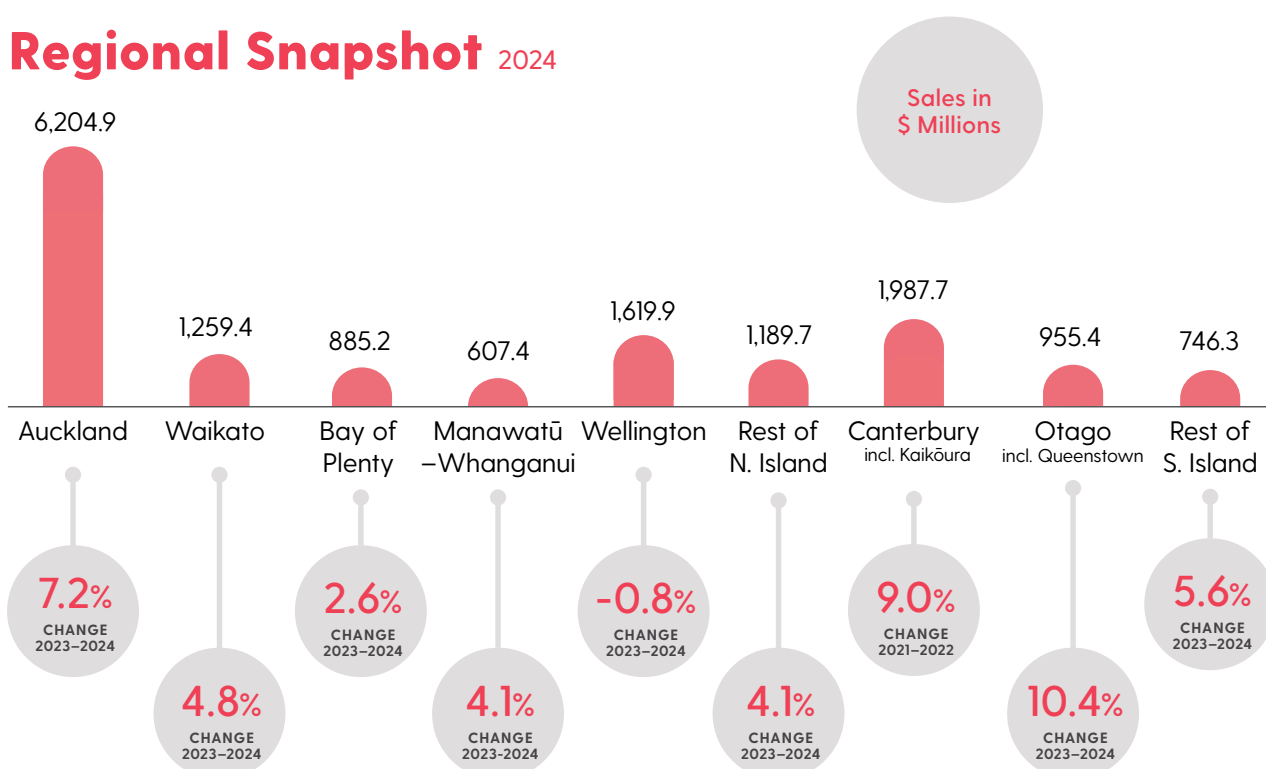
The Cafe and Restaurant sector reached annual sales of \$7.8 billion in 2024, more than 25 per cent more than sales levels recorded for the sector in 2020.

## Annual Industry Sales by region

YEARS ENDED MARCH

| Region                              |                 |                 |                 |                 |                       |                 | MARKET SHARE |
|-------------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------------|-----------------|--------------|
|                                     | 2020            | 2021            | 2022            | 2023            | % change<br>2023-2024 | 2024            | 2024         |
| Northland Region                    | 274.9           | 281.5           | 305.1           | 370.1           | -0.8                  | 367.1           | 2.3%         |
| Auckland Region                     | 4,660.7         | 4,097.3         | 4,590.3         | 5,787.4         | 7.2                   | 6,204.9         | 39.5%        |
| Waikato Region                      | 943.8           | 918.3           | 994.4           | 1,201.3         | 4.8                   | 1,259.4         | 8.0%         |
| Bay of Plenty Region                | 669.3           | 651.9           | 740             | 862.4           | 2.6                   | 885.2           | 5.6%         |
| Gisborne Region                     | 78              | 80.3            | 94.8            | 105.6           | 20.6                  | 127.4           | 0.8%         |
| Hawke's Bay Region                  | 327             | 327.1           | 362.3           | 413.1           | 8.3                   | 447.5           | 2.8%         |
| Taranaki Region                     | 234.1           | 193             | 217             | 254.4           | -2.6                  | 247.7           | 1.6%         |
| Manawatū-Whanganui Region           | 487.4           | 463.4           | 521.8           | 583.2           | 4.1                   | 607.4           | 3.9%         |
| Wellington Region                   | 1,350.9         | 1,250.8         | 1,380.7         | 1,633.5         | -0.8                  | 1,619.9         | 10.3%        |
| West Coast Region                   | 69.9            | 55.6            | 59.7            | 73.9            | 13.9                  | 84.2            | 0.5%         |
| Tasman Region                       | 94              | 96.3            | 103.8           | 108.8           | 4.1                   | 113.3           | 0.7%         |
| Nelson Region                       | 147.4           | 137.1           | 147.4           | 164.7           | 4.3                   | 171.8           | 1.1%         |
| Marlborough Region                  | 105.8           | 103             | 106.5           | 120.9           | 8.4                   | 131.0           | 0.8%         |
| Kaikōura                            | 17.9            | 13.9            | 11.5            | 15.9            | 13.8                  | 18.1            | 0.1%         |
| Canterbury Region excl. Kaikōura    | 1,446.7         | 1,363.7         | 1,533.2         | 1,807.1         | 9.0                   | 1,969.6         | 12.5%        |
| Otago Region excl. Queenstown-Lakes | 408.2           | 368.9           | 422.6           | 469.7           | 6.3                   | 499.3           | 3.2%         |
| Queenstown-Lakes                    | 368.2           | 237.8           | 269.2           | 395.6           | 15.3                  | 456.1           | 2.9%         |
| Southland Region                    | 206.5           | 189.4           | 204.4           | 238.7           | 3.1                   | 246.0           | 1.6%         |
| <b>Total New Zealand</b>            | <b>12,148.9</b> | <b>11,017.9</b> | <b>12,281.2</b> | <b>14,847.4</b> | <b>5.8</b>            | <b>15,713.3</b> |              |

## Regional Snapshot 2024





# OUTLET DATA

Despite minimal overall growth in the number of hospitality outlets, the entrepreneurial spirit continues to drive new business openings, showcasing resilience and innovation within the sector.



Reflecting the uncertain economic environment and a tightening market, the number of hospitality outlets grew by the finest of margins in 2023. Growing by 0.1 per cent over the previous year, the number of outlets reached 19,518 outlets (year end February 2023).

**The minimal 0.1% growth in hospitality outlets reflects a cautious expansion strategy amidst economic uncertainties and operational challenges.**

The number of outlets declined across all sectors in the hospitality industry, with the exception of the Takeaway foodservice sector, which posted a minimal 1.6 per cent increase (an overall increase of 111 outlets from the year previous). There are now almost 7,000 takeaway businesses across Aotearoa. While dominating the industry, the number of Cafes and Restaurants declined overall by 0.1 per cent, although this sector still represents 49 per cent of the industry, with more than 9,500 operations. Catering services declined by 1.3 per cent and Pubs, taverns and bars by -3.4 per cent.

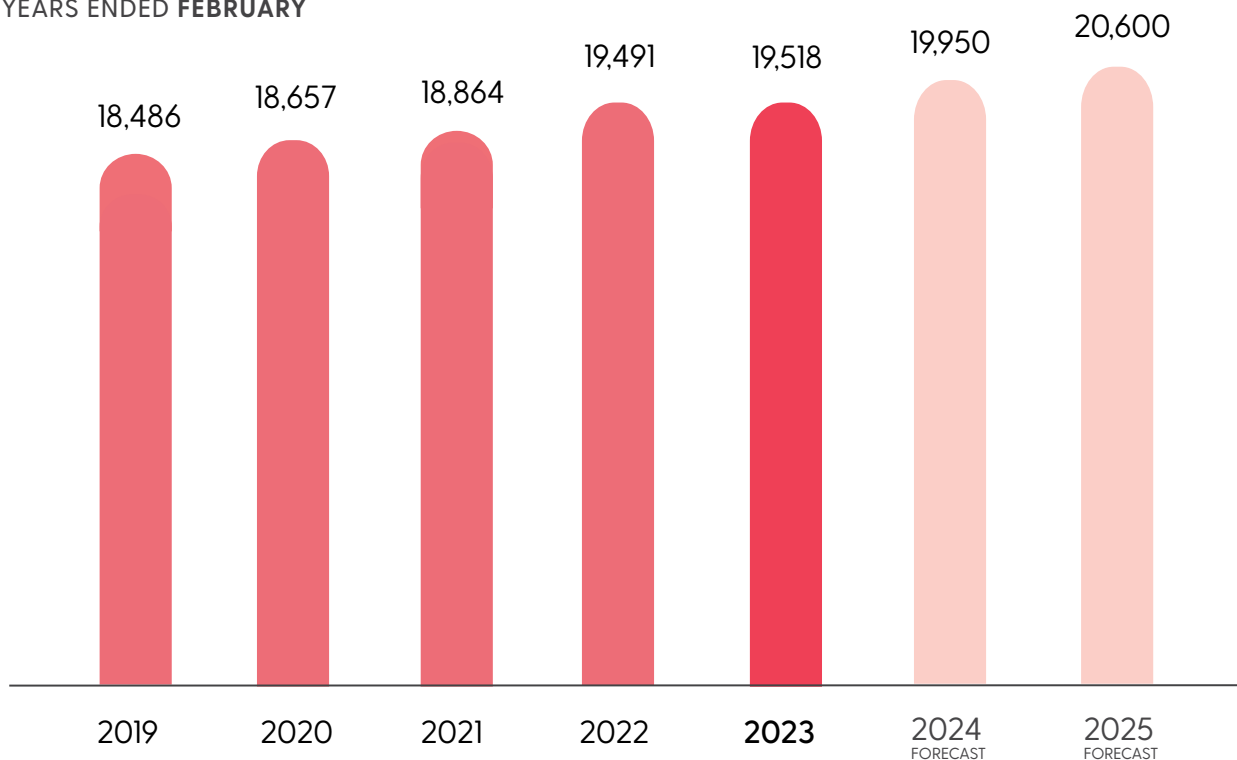
Regionally, whereas a number of regions across the country saw outlet numbers decline, the Marlborough region recorded the largest percentage outlet growth (10.9 per cent). The Auckland region grew by just 30 outlets overall (0.4 per cent). As our largest population it also has 38 per cent of the industry's establishments (7,539).

**The entrepreneurial spirit within the hospitality sector persists, driving new business openings and highlighting resilience and innovation.**

The minimal growth of just 0.1 per cent in the number of hospitality outlets year on year suggests a cautious expansion strategy within the industry, influenced by ongoing economic uncertainties and operational challenges. Despite this, the entrepreneurial spirit the embodies the sectors continues to drive new business openings, showcasing resilience and innovation within the sector.

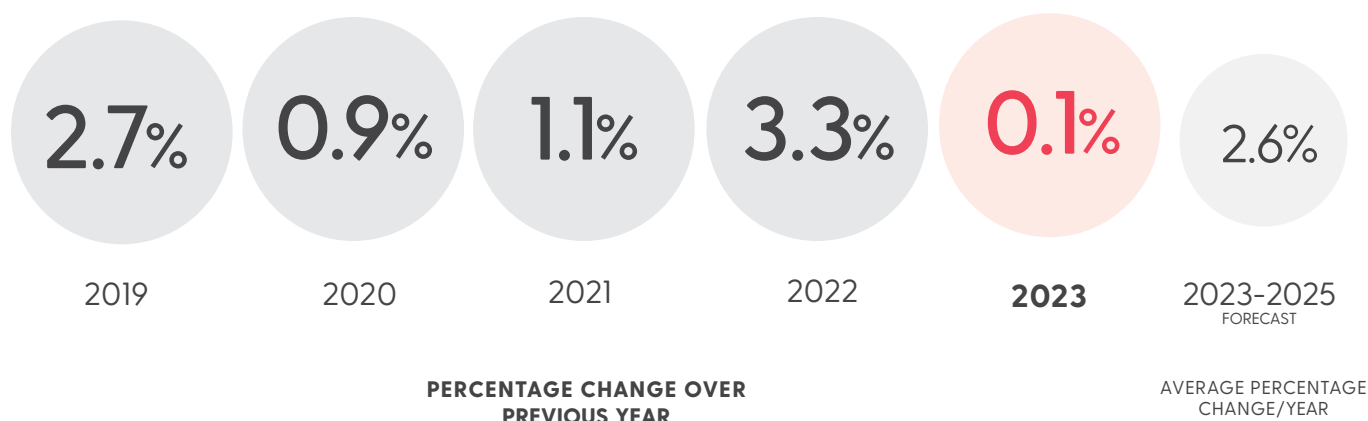
## Outlet Count national

YEARS ENDED FEBRUARY



## Outlet Growth national

YEARS ENDED FEBRUARY

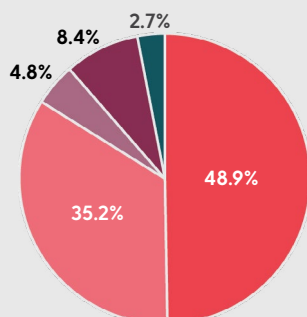


PERCENTAGE CHANGE OVER  
PREVIOUS YEAR

AVERAGE PERCENTAGE  
CHANGE/YEAR

**Outlet Count** by sector

YEARS ENDED FEBRUARY

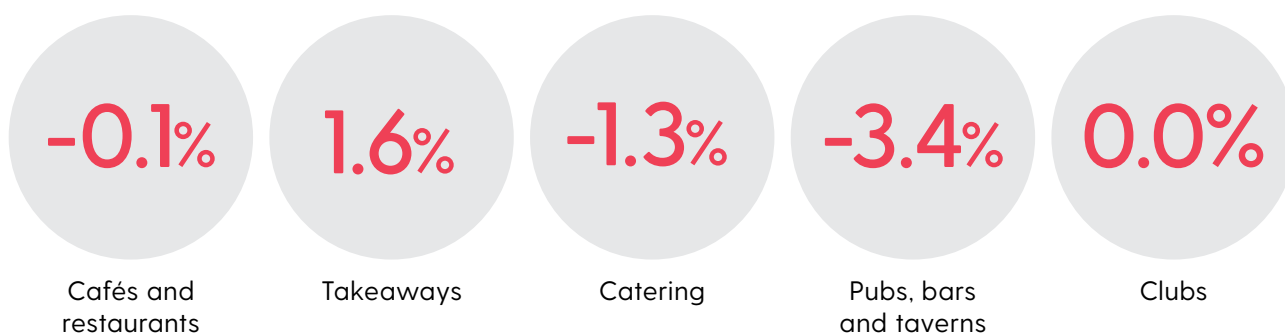
**Market Share 2023**

| Food and Beverage Services Sectors | OUTLET COUNT  |               |               |               |               |
|------------------------------------|---------------|---------------|---------------|---------------|---------------|
|                                    | 2019          | 2020          | 2021          | 2022          | 2023          |
| Cafés and restaurants              | 9,189         | 9,321         | 9,360         | 9,558         | <b>9,546</b>  |
| Takeaway food services             | 6,237         | 6,330         | 6,456         | 6,768         | <b>6,879</b>  |
| Catering services                  | 885           | 900           | 891           | 945           | <b>933</b>    |
| Pubs, taverns and bars             | 1,668         | 1,605         | 1,644         | 1,695         | <b>1,638</b>  |
| Clubs (hospitality)                | 510           | 504           | 516           | 522           | <b>522</b>    |
| <b>Total New Zealand</b>           | <b>18,486</b> | <b>18,657</b> | <b>18,864</b> | <b>19,491</b> | <b>19,518</b> |

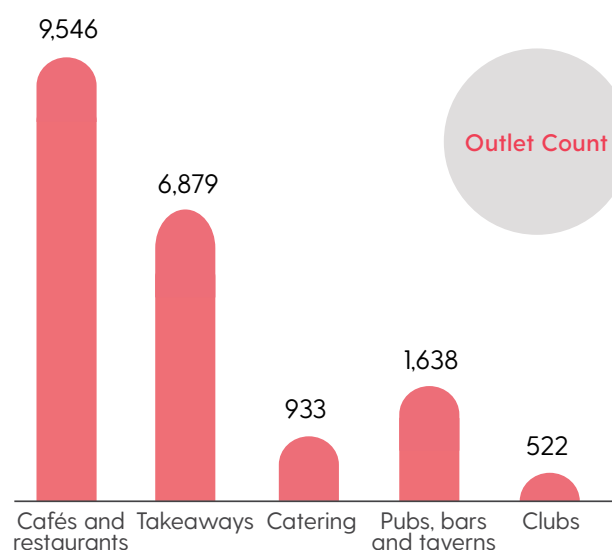
**Outlet Growth** by sector 2023

YEAR ENDED FEBRUARY

## PERCENTAGE CHANGE 2022–2023

**Outlet Count** by sector 2023

YEAR ENDED FEBRUARY

**49%**

The Cafe and restaurant sector makes up the largest segment of the hospitality industry, representing almost half of the industry's 19,518 businesses.

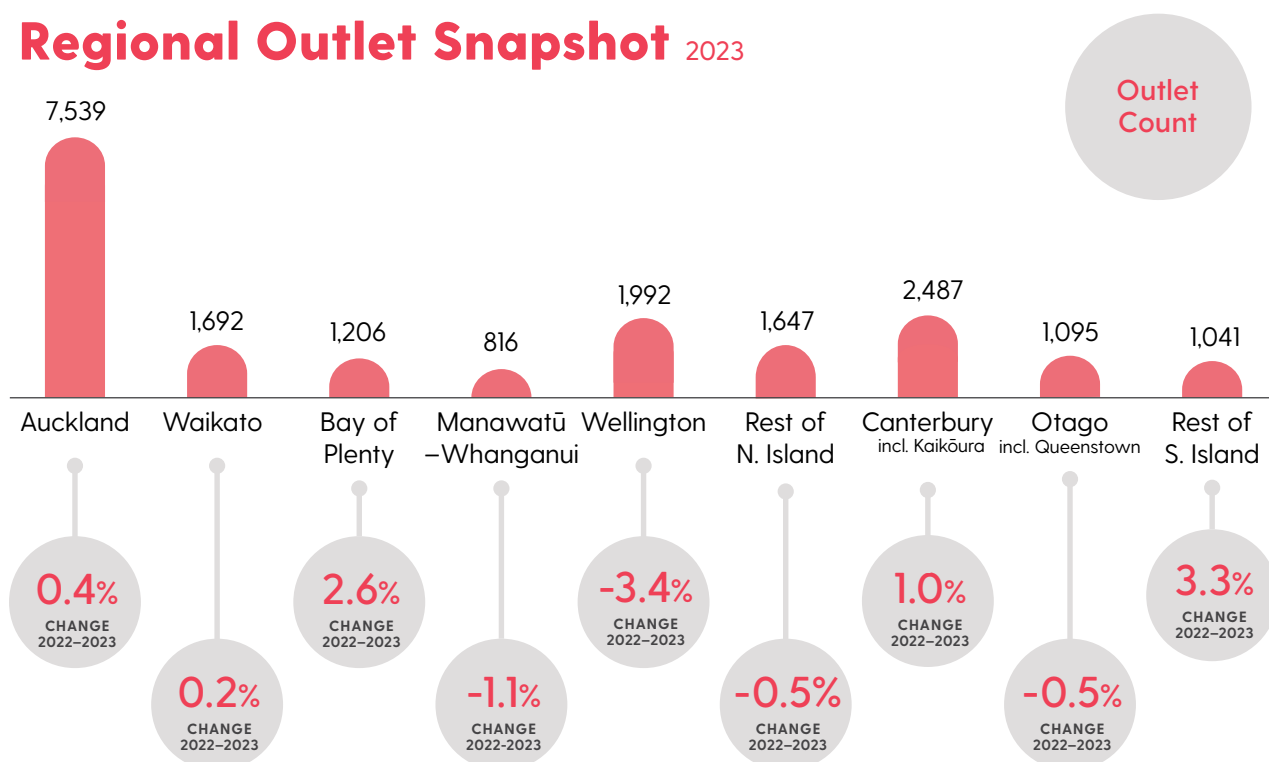
However, outlet growth for this sector remains subdued, posting a decline in 2023 (year ended February) of 0.13 per cent.

## Total Number of Outlets by region

YEARS ENDED FEBRUARY

| Region                              | OUTLET COUNT  |               |               |               |                    |               | MARKET SHARE |
|-------------------------------------|---------------|---------------|---------------|---------------|--------------------|---------------|--------------|
|                                     | 2019          | 2020          | 2021          | 2022          | % change 2022-2023 | 2023          | 2023         |
| Northland Region                    | 549           | 552           | 558           | 576           | 1.0                | 582           | 3.0%         |
| Auckland Region                     | 7,116         | 7,266         | 7,341         | 7,509         | 0.4                | 7,539         | 37.2%        |
| Waikato Region                      | 1,590         | 1,593         | 1,599         | 1,689         | 0.2                | 1,692         | 8.7%         |
| Bay of Plenty Region                | 1,086         | 1,092         | 1,113         | 1,176         | 2.6                | 1,206         | 6.2%         |
| Gisborne Region                     | 132           | 138           | 132           | 138           | 2.2                | 141           | 0.7%         |
| Hawke's Bay Region                  | 525           | 540           | 558           | 567           | -0.5               | 564           | 2.9%         |
| Taranaki Region                     | 378           | 372           | 375           | 375           | -4.0               | 360           | 1.8%         |
| Manawātū-Whanganui Region           | 795           | 798           | 804           | 825           | -1.1               | 816           | 4.2%         |
| Wellington Region                   | 1,983         | 1,980         | 1,989         | 2,061         | -3.4               | 1,992         | 10.2%        |
| West Coast Region                   | 129           | 129           | 132           | 123           | 0.0                | 123           | 0.6%         |
| Tasman Region                       | 192           | 183           | 180           | 189           | -3.2               | 183           | 0.9%         |
| Nelson Region                       | 207           | 207           | 216           | 231           | 5.2                | 243           | 1.2%         |
| Marlborough Region                  | 165           | 165           | 168           | 165           | 10.9               | 183           | 0.9%         |
| Kaikōura                            | 33            | 30            | 33            | 36            | 0.0                | 36            | 0.2%         |
| Canterbury Region excl. Kaikōura    | 2,316         | 2,313         | 2,322         | 2,427         | 1.0                | 2,451         | 12.6%        |
| Otago Region excl. Queenstown-Lakes | 693           | 687           | 702           | 753           | -2.0               | 738           | 3.8%         |
| Queenstown-Lakes                    | 315           | 327           | 336           | 348           | 2.6                | 357           | 1.8%         |
| Southland Region                    | 285           | 288           | 300           | 300           | 3.0                | 309           | 1.6%         |
| <b>Total New Zealand</b>            | <b>18,486</b> | <b>18,657</b> | <b>18,864</b> | <b>19,491</b> | <b>0.1</b>         | <b>19,518</b> |              |

## Regional Outlet Snapshot 2023



A full-page background image of a man with a thick dark beard, a shaved head, and a nose ring. He is wearing a bright blue t-shirt and a dark blue denim apron with brown leather straps. He has his arms crossed and is smiling at the camera. The background is a blurred outdoor setting, possibly a market or a street.

# EMPLOYEE DATA

The hospitality industry saw a strong increase in employee numbers nationwide, driven by the return of international employees, despite continued challenges in filling senior roles and specific regional declines.



The hospitality industry has been in the midst of a severe staffing shortage for a number of years and as a result only minimal employee growth (or decline) has been recorded over the past 5 years. The latest data, however, has seen a 7.3 per cent jump in employee numbers, bringing the number of employees nationwide to 145,000. This means that just under 10,000 employees joined the industry over one year, an indicator, in part, of the return of international employees. In line with this data, Restaurant Association members have been saying that employee shortages have eased, although it is still challenging to fill senior roles.

**The latest data shows a 7.3% jump in employee numbers, with nearly 10,000 new employees joining the hospitality industry, over the year.**

More than half of the people employed in the industry are employed in Cafes and Restaurants (an increase of 5.9 percent from 2022-2023). However,

the Catering sector, which added an additional 2,000 workers in 2023, was the sector to record the strongest employee growth. In percentage terms the number of people employed in Catering businesses grew by 21.7 per cent. Employee numbers in Pubs, taverns and bars also grew to 16,700, recording 11.1 percent growth on the back of two years of declining employee numbers and Takeaway foodservice employees grew by 4.6 percent. There are now 31,900 people employed in this sector.

As our largest city Auckland dominates for hospitality employment opportunities and this region now employs 53,300 hospitality workers (almost 38 per cent of the industry).

Elsewhere across the country many regions recorded strong growth in employee numbers, with six regions increasing employee numbers by more than 10 per cent. These were predominantly South Island regions – Canterbury, West Coast, Otago, Southland, Southern Lakes – along with the Bay of Plenty region in the North.



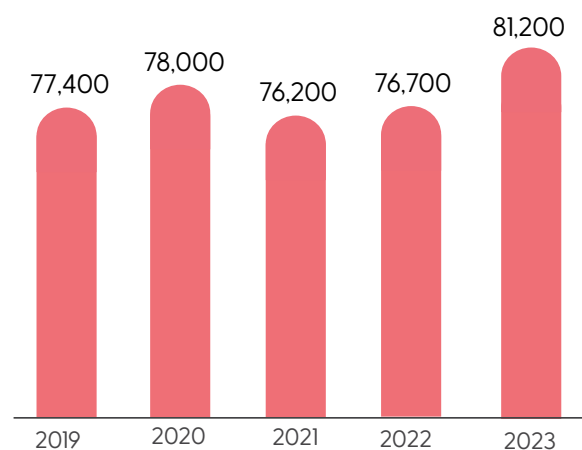
## Cafe & Restaurant snapshot

YEARS ENDED FEBRUARY

Southern Lakes recorded the largest employee growth, with numbers jumping 28.6 per cent. This region has had some of the most significant staffing challenges through the Covid pandemic years, and although the number of people employed in the region has increased by an additional 700 people employee levels are still below pre-Covid numbers.

Only one region recorded a decline in employee numbers. The Manawatū-Whanganui region, which also had a 1.1 per cent decline in outlet numbers, saw -5.2 per cent less people employed in the region.

**Southern Lakes recorded the largest employee growth at 28.6%, reflecting recovery from significant staffing challenges during the Covid pandemic years.**

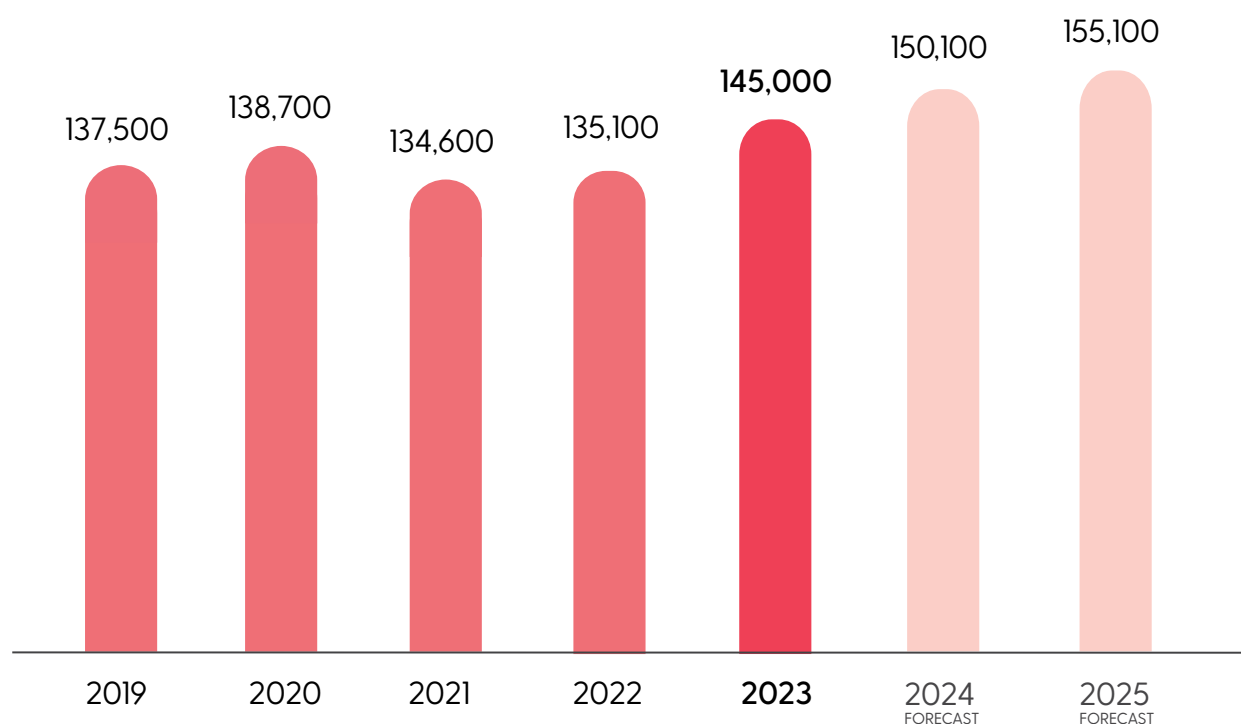


# 56%

Employee numbers in Cafes and Restaurants increased by 5.9 per cent in 2023, after experiencing a decline through Covid-19. This sector employs more than half of the industry's workers. With 81,200 employees, the sector now employs 4.1 per cent more than the previous peak in 2020.

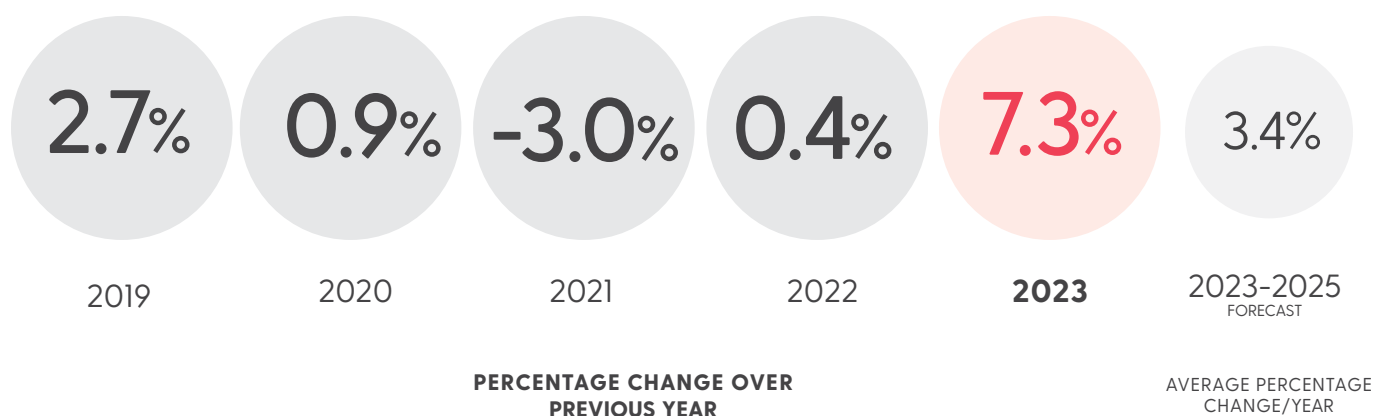
## Employee Count national

YEARS ENDED FEBRUARY



## Employee Growth national

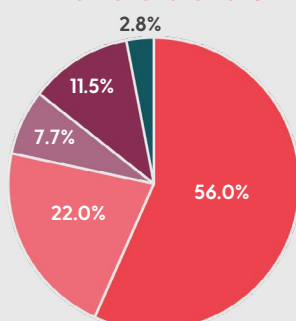
YEARS ENDED FEBRUARY



## Employee Count by sector

YEARS ENDED FEBRUARY

### Market Share 2023

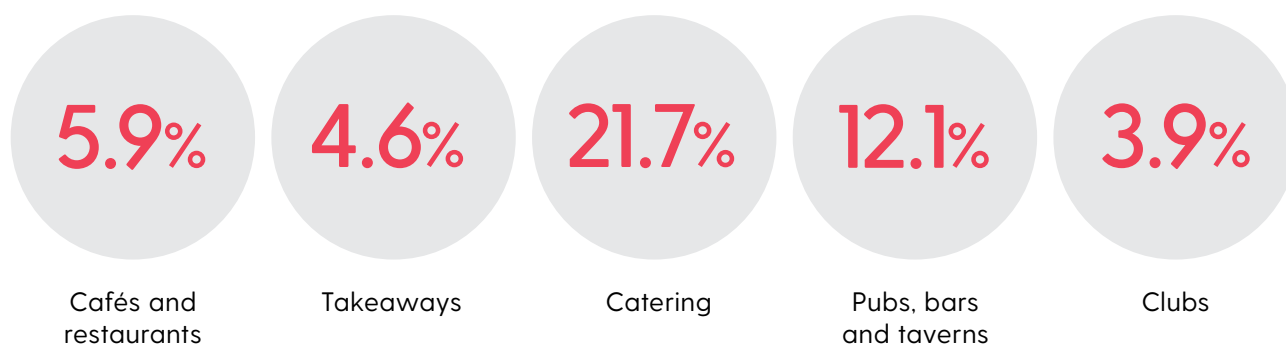


| Food and Beverage Services Sectors | 2019           | 2020           | 2021           | 2022           | 2023           |
|------------------------------------|----------------|----------------|----------------|----------------|----------------|
| Cafés and restaurants              | 77,400         | 78,000         | 76,200         | 76,700         | 81,200         |
| Takeaway food services             | 27,100         | 28,400         | 29,100         | 30,500         | 31,900         |
| Catering services                  | 12,900         | 12,200         | 9,800          | 9,200          | 11,200         |
| Pubs, taverns and bars             | 15,800         | 16,000         | 15,500         | 14,800         | 16,700         |
| Clubs (hospitality)                | 4,300          | 4,250          | 4,050          | 3,850          | 4,000          |
| <b>Total New Zealand</b>           | <b>137,500</b> | <b>138,700</b> | <b>134,600</b> | <b>135,100</b> | <b>145,000</b> |

## Employee Growth by sector

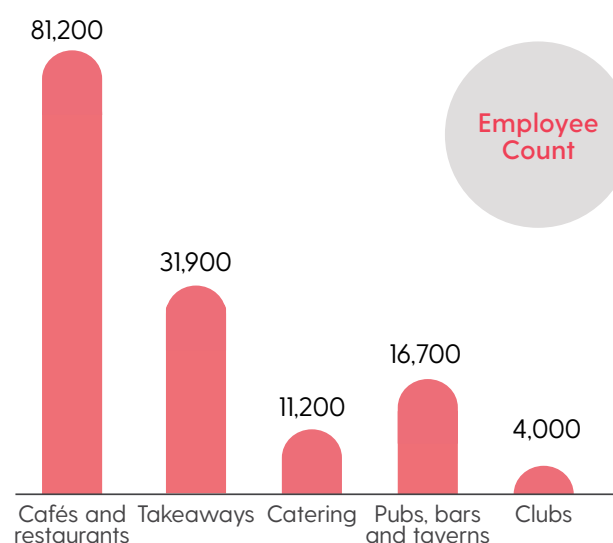
YEAR ENDED FEBRUARY

PERCENTAGE CHANGE 2022–2023



## Employee Count by sector 2023

YEAR ENDED FEBRUARY



# 22%

Employee numbers for the Takeaway foodservice sector by 4.6 per cent in 2023 (year ended February). The sector experienced strong growth through Covid-19 and now employs 17.7 percent more employees than pre-Covid.

With 31,900 employees, the sector represents 22 per cent of the industry's employees.

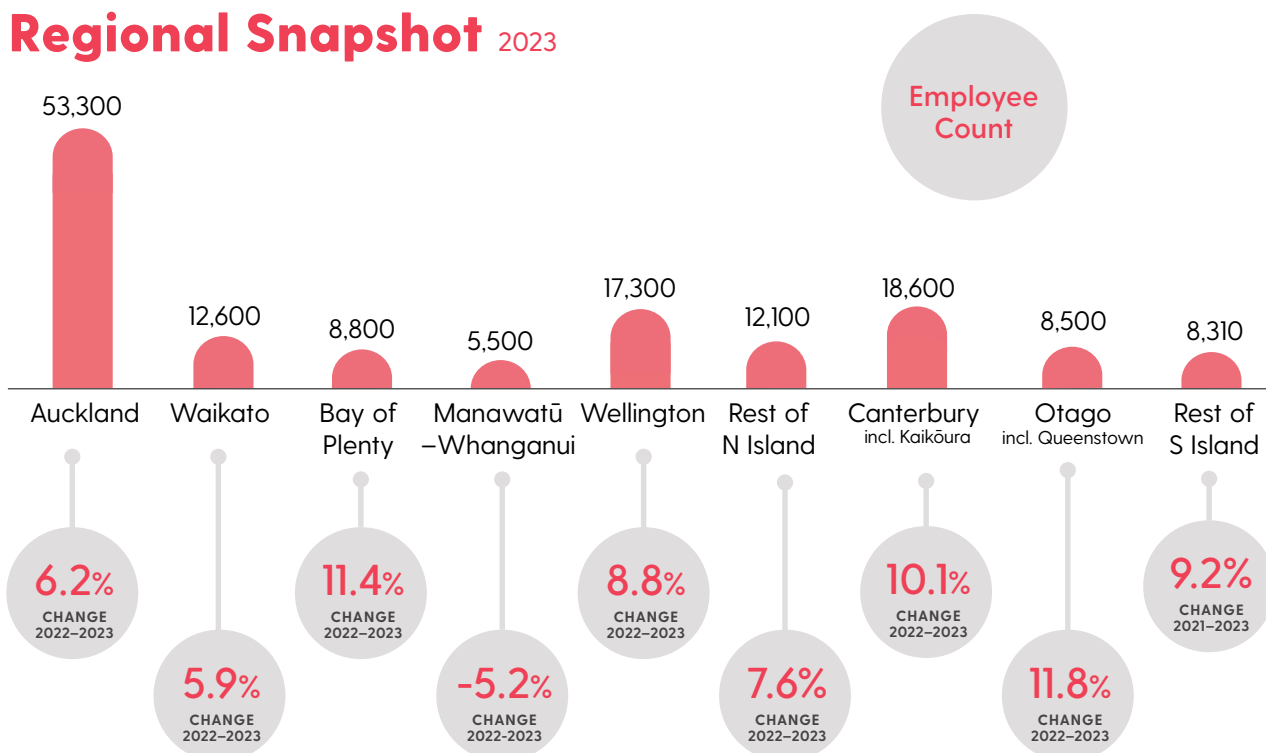
## Total Number of Employees by region

YEARS ENDED FEBRUARY

| Region                              | EMPLOYEE COUNT |                |                |                |                       | 2023           | MARKET SHARE |
|-------------------------------------|----------------|----------------|----------------|----------------|-----------------------|----------------|--------------|
|                                     | 2019           | 2020           | 2021           | 2022           | % change<br>2022-2023 |                |              |
| Northland Region                    | 3,200          | 3,450          | 3,600          | 3,450          | 8.7                   | 3,750          | 2.6%         |
| Auckland Region                     | 51,500         | 52,200         | 50,500         | 50,200         | 6.2                   | 53,300         | 36.8%        |
| Waikato Region                      | 11,600         | 11,600         | 11,800         | 11,900         | 5.9                   | 12,600         | 8.7%         |
| Bay of Plenty Region                | 7,700          | 7,900          | 7,900          | 7,900          | 11.4                  | 8,800          | 6.1%         |
| Gisborne Region                     | 870            | 960            | 1,100          | 1,100          | 4.5                   | 1,150          | 0.8%         |
| Hawke's Bay Region                  | 3,900          | 4,250          | 4,200          | 4,050          | 7.4                   | 4,350          | 3.0%         |
| Taranaki Region                     | 2,700          | 3,000          | 2,700          | 2,650          | 7.5                   | 2,850          | 2.0%         |
| Manawatū-Whanganui Region           | 5,300          | 5,200          | 5,200          | 5,800          | -5.2                  | 5,500          | 3.8%         |
| Wellington Region                   | 16,900         | 16,500         | 16,100         | 15,900         | 8.8                   | 17,300         | 11.9%        |
| West Coast Region                   | 920            | 850            | 710            | 660            | 22.7                  | 810            | 0.6%         |
| Tasman Region                       | 1,500          | 1,450          | 1,450          | 1,250          | 4.0                   | 1,300          | 0.9%         |
| Nelson Region*                      | 1,500          | 1,550          | 1,500          | 2,300          | 8.7                   | 2,500          | 1.7%         |
| Marlborough Region                  | 1,350          | 1,350          | 1,200          | 1,200          | 0.0                   | 1,200          | 0.8%         |
| Kaikōura                            | 210            | 190            | 160            | 150            | 0.0                   | 150            | 0.1%         |
| Canterbury Region excl. Kaikōura    | 17,090         | 16,810         | 16,440         | 16,750         | 10.1                  | 18,450         | 12.7%        |
| Otago Region excl. Queenstown-Lakes | 5,000          | 5,000          | 4,750          | 4,800          | 2.1                   | 4,900          | 3.4%         |
| Queenstown-Lakes                    | 3,900          | 3,900          | 2,950          | 2,800          | 28.6                  | 3,600          | 2.5%         |
| Southland Region                    | 2,400          | 2,450          | 2,250          | 2,200          | 13.6                  | 2,500          | 1.7%         |
| <b>Total New Zealand</b>            | <b>137,500</b> | <b>138,700</b> | <b>134,600</b> | <b>135,100</b> | <b>7.3</b>            | <b>145,000</b> |              |

\* Note, due to a recording change, in 2022, some employee totals which were previously allocated across multiple South Island regions are now recorded in "Nelson"

## Regional Snapshot 2023



A chef in a white shirt and black apron is working in a kitchen, preparing food on several plates. The chef is focused on the task, and the background is blurred, showing other kitchen equipment and lights. The text is overlaid on the left side of the image.

# REMUNERATION/ WAGE BENCHMARKS

After three years of strong wage growth, this year's smaller increase is likely due to economic challenges and the impact of inflation on businesses' ability to raise wages.

## Average wage costs in hospitality have jumped to 39 per cent in 2023, underscoring a critical financial challenge as operators continue to prioritise wage growth despite unsettled economic

The hospitality industry has seen strong wage growth over the past 5 years, with wages increasing by 6.4 per cent on average over the past 3 years. This reflects the industry's efforts to tackle the perception challenges of hospitality and we have been working hard to highlight that our workplaces offer rewarding career opportunities with the type of businesses that people want to work in.

The constraints of operating with a deficit of workers is often referred to by operators as their biggest ongoing challenge. Therefore, it is important for operators to remain highly competitive in the labour market and being able to benchmark an employer's remuneration rates against other operations remains a vital business tool.

In 2024 operators report that the extreme staffing challenges experienced over the past 3 years have eased slightly, although recruiting for senior roles in the industry continues to be difficult. However, aligned with our current declining customer numbers and spend, wage costs have jumped to an average of 39 per cent. As a result managing wage costs is currently listed as the industry's number one challenge. This highlights the substantial financial commitment hospitality businesses are making towards fair employee compensation. Despite facing numerous economic challenges, including a rising cost of living and fluctuating inflation rates, the industry continues to prioritise wage growth for its employees.

In 2024 wage rates in hospitality increased by 2.2 per cent when compared to remuneration data last collected by the Association in July 2023. While the latest survey indicates a more moderate increase in hourly wages compared to previous years, it is crucial to highlight the consistent growth in compensation over a three-year period. The average annual growth rate for hourly wages over the past three years stands at 6.4 per cent, reflecting the industry's ongoing commitment to improving employee compensation. Additionally, salaries have shown a robust growth of 8.1 per cent over the same period, with the average hospitality salary now standing at \$82,999.

Given that we're an industry with very small profit margins of between 4-7%, the increase in wage costs needs to be carefully managed. While wage growth is an important factor necessary to attract and retain staff, the industry's growth over the past years has outpaced productivity gains, leading to increased operational costs. There are many operational challenges unique to hospitality, such as fluctuating demand. Hospitality relies heavily on human labour and consistent service quality. Addressing these challenges requires a balanced approach.

**The Restaurant Association's annual Hospitality Remuneration Survey assesses the impact of the industry's current trading environment.**

## Remuneration snapshot from survey

### Average hourly rate

|                    | \$    |       |       |       |       | SALARY  |
|--------------------|-------|-------|-------|-------|-------|---------|
|                    | 2020  | 2021  | 2022  | 2023  | 2024  | 2024    |
| <b>Management</b>  |       |       |       |       |       |         |
| Duty Manager       | 22.03 | 23.80 | 25.28 | 27.73 | 28.02 | 64,089  |
| Restaurant Manager | 25.68 | 27.62 | 28.36 | 35.75 | 33.49 | 75,870  |
| Executive Chef     | 31.31 | 38.48 | 36.37 | 41.30 | 47.03 | 103,597 |
| Head Chef          | 26.30 | 29.29 | 30.14 | 33.48 | 34.36 | 83,899  |
| Owner-Operator     | 29.71 | 32.75 | 36.50 | 34.42 | 34.41 | 91,882  |
| <b>Other</b>       |       |       |       |       |       |         |
| Bar Person         | 20.04 | 21.55 | 22.39 | 24.70 | 25.39 | ~       |
| Barista            | 20.52 | 21.89 | 23.59 | 25.01 | 25.91 | ~       |
| Café Assistant     | 19.44 | 20.76 | 22.15 | 23.82 | 24.14 | ~       |
| Kitchenhand        | 19.12 | 20.47 | 22.17 | 23.59 | 24.28 | ~       |
| Wait Staff         | 19.66 | 20.67 | 22.55 | 24.04 | 24.61 | ~       |

The Survey provides insightful data on wage and salary rates for over 100 hospitality positions across 11 regions nationwide, drawn from over 1,000 businesses, employing over 27,000 people.

The 2024 Remuneration Survey indicates that the average wage in hospitality is \$27.15/hour – well above both the minimum wage and the living wage. Hourly rate growth includes:

- 13.9 per cent increase for an Executive Chef
- 7.0 per cent growth for Bar Managers and Maitre D's
- wage rises of over 6 per cent for Junior Cooks.

In addition, the average salary for the industry rose to \$82,999.

### Regional analysis reveals the regions with the highest average hourly rate

In 2024 the highest overall average hourly wage can be found in the Hawke's Bay / Gisborne region at \$28.26/hour. This is followed by Queenstown/Southern Lakes at \$27.77/hour, and Auckland at \$27.74/hour, at \$24.96/hour.

Further regional analysis shows

- a Head Chef in Auckland will earn \$36.06/hour on average, \$33.00 in Wellington and \$34.61 in Hawke's Bay
- a Restaurant Manager earns \$34.78/hour in Canterbury and \$29.46/hour in Otago
- a Maitre D' earns the highest hourly wage in Hawke's Bay (\$32.00/hour), \$3.13/hour more than the national average hourly rate for this role.
- a Bar Manager earns the highest hourly wage in Auckland (\$34.42/hour).

### Operators are looking to grow their teams over the next 12 months

The Survey also forecasts future workforce trends for the industry. In a sign of the difficult trading environment currently, around 62 per cent of employers intend to keep their staffing levels the same, while 28 per cent plan to increase the size of their teams over the next 12 months, if they are able. However, operators are still reporting that their businesses are not currently fully staffed – a result of the industry's skilled staffing challenges.

**“It’s a tough climate at the moment. If I had more customers and were busier than I am currently I would hire more staff and pay them more. It is extremely hard to keep the door open.”**

– Member response, 2024 Remuneration Survey

# FUTURE OF HOSPITALITY ROADMAP



**“The first of it’s kind in Aotearoa, the Future of Hospitality roadmap set out how the way for the sector to be seen as a national leader. We’ve identified the industry’s challenges, identified our goals and mapped out transformation.”**

- Marisa Bidois

## **Our vision:** a hospitality sector fit for the future

### **What is the Future of Hospitality Roadmap?**

Launched in 2021, the Future of Hospitality Roadmap is an industry-led document originally created to support the revival and replenishment of the hospitality sector in Aotearoa following the devastating impact of COVID-19, but has since continued to expand and grow as a reference point for the ongoing sustainability and growth of the hospitality industry now and into the future.

### **The 6 goals of the Roadmap**

1. Create workable solutions for legacy issues faced by the industry.
2. Build business capability, to develop sustainable and financially fit businesses prepared for the future.
3. Encourage ongoing partnership and collaboration between industry and Government.
4. Support the development of fit for purpose,

adequately funded education and training options that produce ready-to-work, productive, career focused employees.

5. Assisting industry to leverage technology for efficiency and innovation by adopting cutting-edge technologies to streamline operations, enhance the customer experience, and create new service models.
6. Advocate expansion of global marketing efforts to build Aotearoa’s food story and brand.

We’re a vibrant industry full of interesting, talented and entrepreneurial people. This roadmap sets out how the sector proposes how we pave the way for the sector to be seen as national leader: providing better skilled workforces, sustainable and safer workplaces, more adequate resources and investment, ensuring a well-rounded, productive sector that is a vital ingredient in nationwide tourism and continues to provide a growth story for the wider Aotearoa economy.

Find out more at [www.restaurantnz.co.nz/future-of-hospitality-roadmap/](http://www.restaurantnz.co.nz/future-of-hospitality-roadmap/)

## Increased training for New Zealanders to meet skills shortage needs

- Assess current skills shortage measure.
- Existing education framework to be reviewed, gaps identified.
  - Training to be centralised or accredited centrally to ensure education is consistent and targeted to address skills shortages.

## Investment in hospitality in terms of training, promotion, engagement from government

- Create a centralised training resource which provides information to hospitality businesses across all aspects of running their business.
- Create a platform for recognition of employers exceeding benchmark standards

HospoCred platform created  
hospocred.co.nz

## Agile immigration policy to meet the needs of the sector

- Establish a dedicated hospitality connection within immigration - to ensure hospitality is considered a high priority when considering policy changes.
- Create stronger links between education and training policies.
  - Through a Government Policy Statement and by requiring reporting on how demand for migrant labour and skills gaps inform training priorities.

## Regulation review across the hospitality sector

- Present a list of policies, outline the impact these policies have on the sector and suggested changes. Collaboration with industry in addressing this challenge is crucial to ensuring compliance through a better understanding of regulations.
- Changes should be made to legislation that will ease the regulatory burden on our businesses.

## Campaigns to address perception challenges

- Find your future in hospitality campaign (#hospolife). Engage a Youth Council to help shape and guide strategy around what best serves the youth demographic ([www.restaurantnz.co.nz/rangatahi-advisory-group](http://www.restaurantnz.co.nz/rangatahi-advisory-group)).
- Research to be completed with current and potential workers on their perceptions of the sector following on from the research carried out by Tātaki Auckland Unlimited and Tourism Industry Aotearoa.

Rangatahi Advisory Group created

#hospolife campaign created

## Digital transformation and future technology

- Identify the technology needs of the industry (industry hackathon) and develop the training and guidance needed to help future-proof the industry.
- Foster the adoption of new technologies for operations, guest services, and marketing, including the use of AI, IoT, and virtual reality to enhance the customer experience.

2024 event in progress

## Provide financial support for short course training designed by industry

- Investigate micro-credentialised industry short courses.
- Create fast-track training that provides entry-level skills training and basic employability skills to identified target groups (HospoStart - [www.restaurantnz.co.nz/education/hospo-start/](http://www.restaurantnz.co.nz/education/hospo-start/)).

HospoStart training established

## Engaged governance & dedicated unit in MBIE

- Now that Ministerial representation has been established, a specified unit within MBIE is also needed, allowing industry to collaborate with Government to continue to develop - in terms of the sector's positive impact on the economy and employment to NZers.

Minister for Hospitality established 2023

## Tourism campaigns to encourage food tourism experiences

- Promoting campaigns specifically focused on the strong relationship between tourism and hospitality.
- Promote hospitality and tourism job opportunities to the international labour market.

## Research business capability

- Research current business capability to inform the development of the tools needed to create more productive, sustainable and profitable business models.

## Encourage sustainability and environmental stewardship

- Establish sustainability benchmarks and certifications that encourage environmentally friendly practices and appeal to eco-conscious travelers. Provide guidance for industry to adopt more sustainable practices.

Kai Keepers food waste pilot established  
[kaikeepers.co.nz](http://kaikeepers.co.nz)

## Disaster preparedness and business resilience planning

- Develop plans for disaster response and business continuity, considering the ongoing potential for natural disasters or other disruptive events in New Zealand.

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advocate to the  
Government**

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and advocate to the  
Government on your  
behalf on immigration,  
targeted support and wage  
issues.**



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drive traffic  
to your doors.**

**Our online restaurant  
guide Dinefind.co.nz and  
our gift voucher and gift  
card programmes help drive  
traffic to your doors.**



**We'll boost your  
bottom line.**

**We save you money.  
We partnered with great  
businesses to bring you  
exclusive discounts – from  
banking to EFTPOS terminals  
and payroll services.**



**We'll be your  
cheerleader.**

**We celebrate your success.  
Our hospitality awards  
recognise success  
and promote your  
business to the public.**



**We are your link  
between good food  
and good business.**

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## APPENDIX NOTES:

### SALES DATA

1. Sales data: Figures are exclusive of GST.
2. Due to rounding, figures may not sum to the stated totals.
3. Annual sales data is for years ended March.

### OUTLET AND EMPLOYEE DATA

1. These statistics are provisional, and updates in the series may be incorporated in subsequent releases. It is expected the largest revisions will occur in the most recent reference periods, with smaller changes earlier in the time series.
2. Fine-level regional and industry business demography data needs to be used with caution. The Business Frame, which is the main source of data for the business demography series, is designed to support quality national level statistics. It is not designed to provide quality fine level regional or industry statistics and is indicative only.
3. Employee Count is a head count of salary and wage earners for the February reference month sourced from taxation data.
4. Employment and Business location figures are rounded, and discrepancies may occur between sums of component items and totals.
  - Outlet data is random rounded to base 3.
  - Employee data is graduated random rounded (Less than 22 employees to base 3, 22–100 employees to base 5, 100–1000 employees to base 10, 1000–5000 employees to base 50, more than 5,000 employees to base 100).
5. Coverage is of all Economically Significant Enterprises (ESE), these are generally defined as enterprises with greater than \$30,000 annual GST expenses or sales, or enterprises in a GST exempt industry.
6. The time series of Business Demography has several significant changes caused by improved Stats NZ processes.
7. The industrial classification coded to an Enterprise is determined by its predominant economic activity. Where an Enterprise has Geographic Units outside of the geographic area to which it has been assigned, these can also help to determine the industrial classification of the Enterprise.
8. Individual components will not add up to Sub Totals and Totals. An Enterprise may have Geographic Units in more than one geographic area, so it is counted separately in each of those geographic areas.
9. Annual outlet data and employee data is for years ended February.

The 2024 Hospitality Report was compiled by the Restaurant Association of New Zealand. If you have any questions, please contact us here:

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