



Commercial Accommodation Monitor:

November 2017

Hawke’s Bay

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Preface

Commercial Accommodation Monitor: November 2017 – Hawke’s Bay presents comprehensive and impartial information on short-term commercial accommodation for the Hawke’s Bay 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:

- Central Hawke’s Bay District
- Hastings District
- Napier City
- Wairoa 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).

The December 2017 monitor will be released on 15 February 2018.

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 2017 compared with November 2016:

- Guest nights rose 3.8 percent to 100,371
- International guest nights rose 7.2 percent to 34,327
- Domestic guest nights rose 2.1 percent to 66,045
- The average length of stay rose from 2.07 nights to 2.19 nights
- The overall occupancy rate rose from 45.5 percent to 49.7 percent
- The occupancy rate, excluding holiday parks, was 67.6 percent in November 2017
- Accommodation capacity, excluding holiday parks, fell 3.9 percent.

Response rates for November 2017

The response rate for the Hawke’s Bay RTO area was 77 percent for November 2017. The proportion of the origin-of-guest estimate from unadjusted data was 74 percent.

Figure 1.1

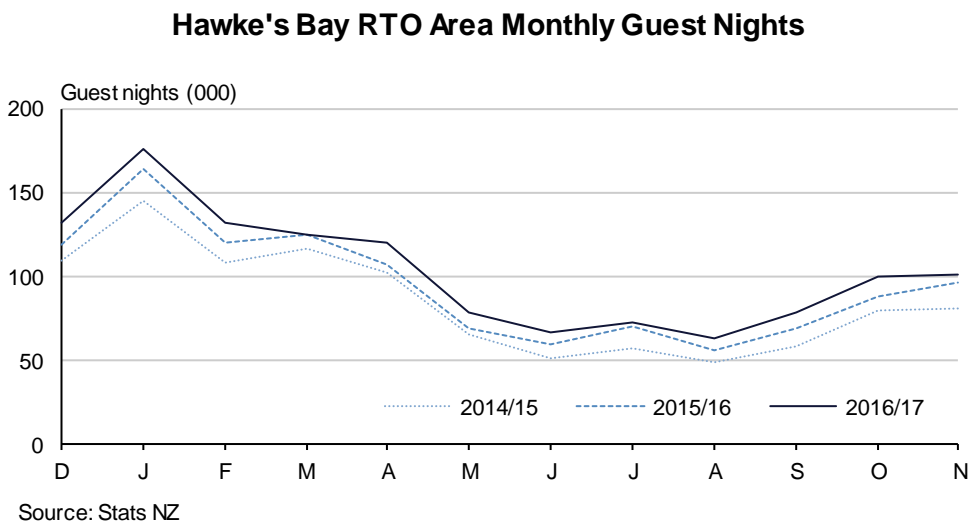
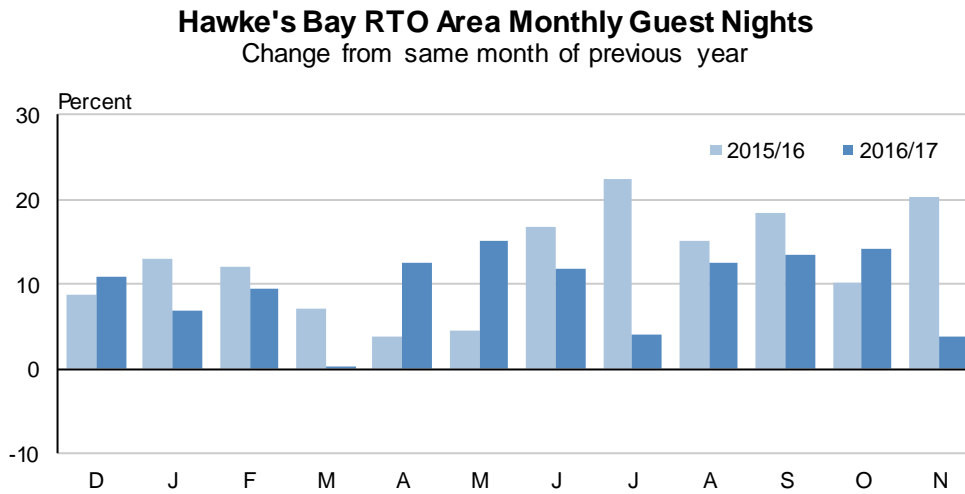


Figure 1.2



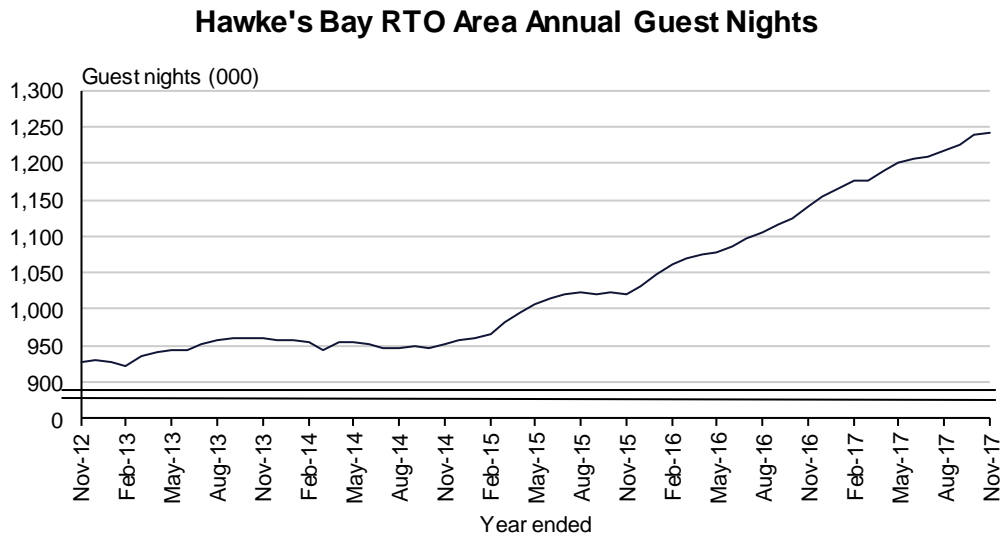
Source: Stats NZ

Year ended highlights

For the year ended November 2017 compared with the previous year:

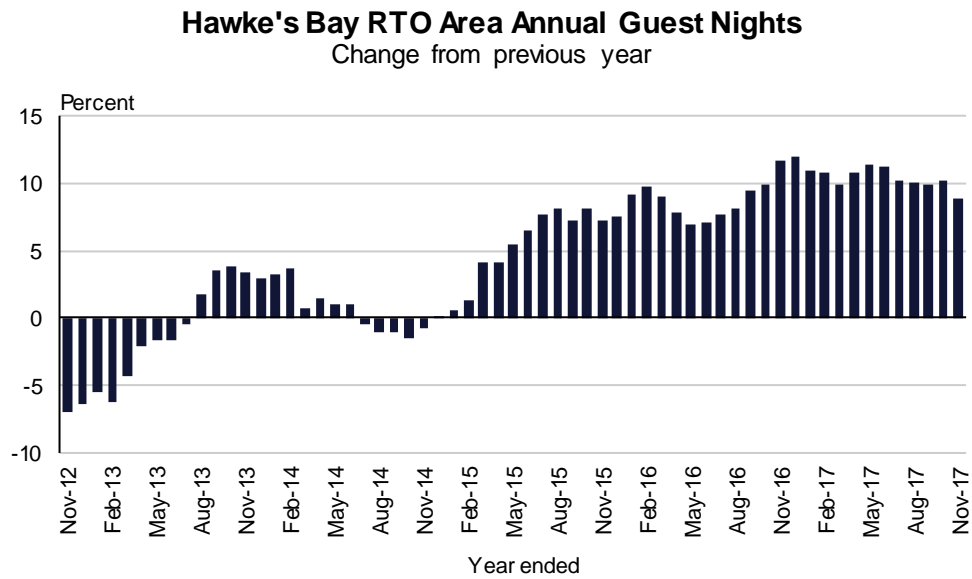
- Guest nights rose 8.9 percent to 1,241,901
- International guest nights rose 7.3 percent to 340,450
- Domestic guest nights rose 9.5 percent to 901,451
- The average length of stay rose from 2.22 nights to 2.26 nights
- The overall occupancy rate rose from 41.5 percent to 46.2 percent
- The occupancy rate, excluding holiday parks, was 59.8 percent for the year ended November 2017
- Accommodation capacity, excluding holiday parks, fell 3.6 percent.

Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

2 Accommodation variables

In November 2017, compared with November 2016, there was an increase of 3.8 percent in total guest nights for the Hawke's Bay RTO area. Holiday parks had the largest increase, followed by hotels. Motels had the only decrease.

For the year ended November 2017, compared with the previous November year, total guest nights for the Hawke's Bay RTO area increased 8.9 percent. Holiday parks had the largest increase, followed by hotels.

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

Table 2.1

Hawke's Bay Accommodation Variables*By accommodation type
Monthly and year ended⁽¹⁾⁽²⁾*

Accommodation type	Monthly			Annual		
	November		Percentage change	Year ended		Percentage change
	2016	2017		November 2016	November 2017	
Guest nights						
Total guest nights	96,716	100,371	3.8	1,140,411	1,241,901	8.9
International	32,009	34,327	7.2	317,315	340,450	7.3
Domestic	64,706	66,045	2.1	823,096	901,451	9.5
Hotels	16,346	19,497	19.3	173,113	200,556	15.9
Motels/apartments	49,868	43,936	-11.9	576,156	585,900	1.7
Backpackers	15,056	17,274	14.7	154,623	164,502	6.4
Holiday parks	15,446	19,664	27.3	236,519	290,943	23.0
Occupancy rates⁽³⁾ (%)						
Hotels	67.9	73.6	8.3	57.0	63.4	11.3
Motels/apartments	71.8	70.4	-1.9	61.5	67.8	10.2
Backpackers	51.0	59.3	16.2	44.4	45.5	2.6
Holiday parks	16.3	19.4	19.6	19.6	24.2	23.7
Total	45.5	49.7	9.4	41.5	46.2	11.4
Total excluding holiday parks ⁽⁴⁾	64.2	67.6	5.2	55.1	59.8	8.5
Average length of stay⁽⁵⁾						
Hotels	1.65	1.70	3.3	1.73	1.56	-9.8
Motels/apartments	1.85	1.96	6.1	2.01	2.10	4.3
Backpackers	6.54	4.32	-34.0	5.26	4.62	-12.1
Holiday parks	2.06	2.44	18.5	2.43	2.74	12.7
Total	2.07	2.19	5.5	2.22	2.26	1.7
Guest arrivals						
Hotels	9,929	11,463	15.5	100,040	128,453	28.4
Motels/apartments	26,960	22,389	-17.0	286,598	279,400	-2.5
Backpackers	2,301	3,999	73.8	29,399	35,571	21.0
Holiday parks	7,509	8,069	7.4	97,419	106,329	9.1
Total	46,699	45,920	-1.7	513,456	549,752	7.1
Establishments						
Hotels	17	18	5.9	17	18	5.9
Motels/apartments	72	66	-8.3	72	66	-8.3
Backpackers	18	14	-22.2	18	14	-22.2
Holiday parks	21	20	-4.8	21	20	-4.8
Total	128	118	-7.8	128	118	-7.8
Capacity⁽⁶⁾						
Hotels	14,880	16,230	9.1	183,832	188,375	2.5
Motels/apartments	38,010	35,640	-6.2	474,445	449,554	-5.2
Backpackers	25,830	23,760	-8.0	315,380	300,829	-4.6
Holiday parks	50,610	44,640	-11.8	601,804	575,449	-4.4
Total	129,330	120,270	-7.0	1,575,461	1,514,207	-3.9

(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:

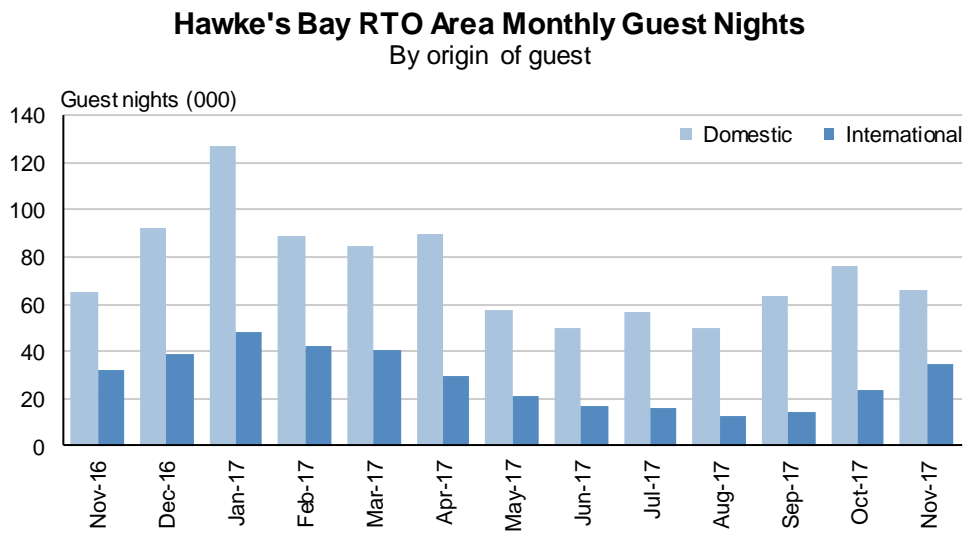
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3 Origin of guests

In November 2017, international guests accounted for 34.2 percent of all guest nights in the Hawke's Bay RTO area. When compared with November 2016, the number of international guest nights spent in the area in November 2017 was up 7.2 percent to 34,327. Domestic guest nights increased 2.1 percent, to 66,045, for the same period.

The proportion of the origin-of-guest estimate from actual data was 74 percent for November 2017.

Figure 3.1



Source: Stats NZ

Table 3.1

Hawke’s Bay and New Zealand Monthly Guest Nights
By origin of guest

		Hawke's Bay RTO ⁽¹⁾ area			New Zealand		
		Origin of guest		Total	Origin of guest		Total
		Domestic	International		Domestic	International	
Month							
2016	Nov	64,706	32,009	96,716	1,679,960	1,585,153	3,265,113
	Dec	92,172	39,200	131,372	2,169,488	1,813,842	3,983,330
2017	Jan	126,571	48,592	175,164	2,844,918	2,054,537	4,899,455
	Feb	89,215	42,533	131,747	1,985,807	1,963,320	3,949,127
	Mar	84,192	40,954	125,146	2,028,090	1,837,951	3,866,041
	Apr	89,926	29,707	119,633	1,926,006	1,536,088	3,462,094
	May	57,774	20,819	78,592	1,457,780	1,043,047	2,500,827
	Jun	50,028	16,743	66,771	1,411,543	897,622	2,309,165
	Jul	56,314	16,246	72,560	1,649,217	1,024,216	2,673,433
	Aug	49,761	13,032	62,793	1,492,179	948,419	2,440,597
	Sep	63,602	14,433	78,035	1,639,056	1,030,456	2,669,511
	Oct	75,850	23,865	99,715	1,843,147	1,303,650	3,146,797
	Nov	66,045	34,327	100,371	1,732,137	1,673,546	3,405,683
Percent change from the current month of the previous year							
		2.1	7.2	3.8	3.1	5.6	4.3
Year ended							
	November 2016	823,096	317,315	1,140,411	22,044,762	16,324,675	38,369,437
	November 2017	901,451	340,450	1,241,901	22,179,367	17,126,694	39,306,061
Percent change from previous year							
		9.5	7.3	8.9	0.6	4.9	2.4

(1) Regional tourism organisation

4 National results

In November 2017, a total of 3,406,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 141,000 nights (4.3 percent) from November 2016. Both the North Island (up 81,000 or 4.3 percent) and South Island (up 59,000 or 4.4 percent) recorded an increase.

All four accommodation types recorded an increase in guest nights in November 2017, compared with November 2016. Hotels had the largest increase in guest nights (up 50,000 or 4.2 percent), followed by holiday parks (up 38,000 or 6.9 percent), backpackers (up 34,000 or 7.3 percent), and motels (up 18,000 or 1.7 percent).

For the year ended November 2017, there were 39,306,000 guest nights, an increase of 937,000 (2.4 percent) from the previous November year.

Refer to Table 4.1 for comparisons of data.

Table 4.1

Accommodation type	Total guest nights			Percentage change	
	2015	2016	2017	2015 to 2016	2016 to 2017
November month					
Hawke's Bay RTO area					
Hotels	12,986	16,346	19,497	25.9	19.3
Motels	39,446	49,868	43,936	26.4	-11.9
Backpackers	14,565	15,056	17,274	3.4	14.7
Holiday parks	13,342	15,446	19,664	15.8	27.3
Total	80,339	96,716	100,371	20.4	3.8
New Zealand					
Hotels	1,162,808	1,192,202	1,242,438	2.5	4.2
Motels	984,085	1,061,386	1,079,835	7.9	1.7
Backpackers	454,844	461,411	495,239	1.4	7.3
Holiday parks	505,260	550,113	588,171	8.9	6.9
Total	3,106,997	3,265,113	3,405,683	5.1	4.3
Year ended November					
Hawke's Bay RTO area					
Hotels	151,679	173,113	200,556	14.1	15.9
Motels	535,003	576,156	585,900	7.7	1.7
Backpackers	136,743	154,623	164,502	13.1	6.4
Holiday parks	197,186	236,519	290,943	19.9	23.0
Total	1,020,611	1,140,411	1,241,901	11.7	8.9
New Zealand					
Hotels	12,761,310	13,578,684	13,866,631	6.4	2.1
Motels	11,411,220	12,073,813	12,349,572	5.8	2.3
Backpackers	4,920,932	5,155,700	5,205,231	4.8	1.0
Holiday parks	6,936,799	7,561,239	7,884,627	9.0	4.3
Total	36,030,261	38,369,437	39,306,061	6.5	2.4

5 Regional comparison

In November 2017, Canterbury recorded the largest increase in guest nights (up 20,000 or 6.6 percent) from November 2016. This was followed by Rotorua (up 16,000 or 8.6 percent), Wellington (up 16,000 or 6.9 percent), Auckland (up 13,000 or 2.0 percent), and Hurunui (up 8,000 or 34.1 percent).

Waitaki recorded the largest decrease (down 3,000 or 8.4 percent), followed by Clutha (down 900 or 11.6 percent), Bay of Plenty (down 500 or 0.6 percent), Kapiti-Horowhenua (down 400 or 1.8 percent), and Wairarapa (down 100 or 0.4 percent).

Table 5.1

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

RTO area	November guest nights								
	Domestic			International			Total		
	2016	2017	Percent age change	2016	2017	Percent age change	2016	2017	Percent age change
Northland	84,106	81,031	-3.7	63,529	69,715	9.7	147,635	150,746	2.1
Auckland	345,637	328,045	-5.1	301,005	331,848	10.2	646,641	659,894	2.0
Coromandel	41,855	45,716	9.2	29,731	29,605	-0.4	71,586	75,320	5.2
Waikato	87,039	87,262	0.3	36,068	39,447	9.4	123,107	126,708	2.9
Bay of Plenty	65,271	61,131	-6.3	29,633	33,242	12.2	94,904	94,373	-0.6
Rotorua	68,085	91,344	34.2	120,258	113,282	-5.8	188,343	204,626	8.6
Taupo	48,907	55,349	13.2	39,941	40,432	1.2	88,848	95,781	7.8
Whakatane-									
Kaw erau	12,975	14,215	9.6	5,990	5,592	-6.6	18,966	19,808	4.4
Gisborne	21,559	22,933	6.4	4,736	6,109	29.0	26,294	29,042	10.5
Taranaki	40,674	42,311	4.0	9,266	12,518	35.1	49,940	54,829	9.8
Haw ke's Bay	64,706	66,045	2.1	32,009	34,327	7.2	96,716	100,371	3.8
Ruapehu	17,060	18,141	6.3	15,026	18,235	21.4	32,087	36,376	13.4
Manaw atu	36,685	35,912	-2.1	5,796	8,080	39.4	42,482	43,991	3.6
Whanganui	10,825	12,178	12.5	3,775	4,212	11.6	14,599	16,390	12.3
Wairarapa	14,131	14,122	-0.1	4,381	4,322	-1.3	18,512	18,444	-0.4
Kapiti-Horow henua	16,830	16,461	-2.2	3,545	3,546	0.0	20,375	20,007	-1.8
Wellington	142,203	152,085	6.9	84,039	89,803	6.9	226,242	241,888	6.9
Marlborough	31,912	33,942	6.4	32,183	32,199	0.1	64,095	66,141	3.2
Nelson-Tasman	58,486	60,568	3.6	55,641	60,736	9.2	114,127	121,303	6.3
Canterbury	154,744	171,966	11.1	154,292	157,386	2.0	309,037	329,353	6.6
Hurunui	16,162	20,064	24.1	7,368	11,482	55.8	23,530	31,546	34.1
Mackenzie	16,143	18,723	16.0	52,318	54,416	4.0	68,462	73,139	6.8
Timaru	17,121	17,830	4.1	8,194	8,145	-0.6	25,315	25,976	2.6
West Coast	38,580	39,445	2.2	94,908	97,331	2.6	133,488	136,776	2.5
Wanaka	20,889	23,382	11.9	45,047	47,078	4.5	65,936	70,460	6.9
Queenstow n	83,808	80,258	-4.2	212,825	221,621	4.1	296,634	301,879	1.8
Waitaki	19,554	17,547	-10.3	18,364	17,192	-6.4	37,918	34,740	-8.4
Central Otago	14,127	15,598	10.4	6,330	5,374	-15.1	20,456	20,972	2.5
Dunedin	46,129	42,267	-8.4	35,135	39,122	11.3	81,264	81,389	0.2
Clutha	3,590	3,918	9.1	3,776	2,596	-31.3	7,366	6,514	-11.6
Fiordland	15,520	17,845	15.0	55,381	59,084	6.7	70,902	76,929	8.5
Southland	24,647	24,505	-0.6	14,661	15,468	5.5	39,307	39,973	1.7
Total	1,679,960	1,732,137	3.1	1,585,153	1,673,546	5.6	3,265,113	3,405,683	4.3

Table 5.2

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

RTO area	November 2017 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks ⁽²⁾
	Percent					
Northland	52.0	62.2	48.2	14.3	30.7	55.0
Auckland	86.9	72.4	66.1	21.5	71.6	79.0
Coromandel	50.6	52.4	31.0	18.4	25.8	42.4
Waikato	73.5	73.9	49.8	19.6	49.5	67.8
Bay of Plenty	65.8	65.9	60.6	21.1	42.3	63.9
Rotorua	87.1	79.3	38.0	25.2	56.8	65.0
Taupo	63.5	66.0	48.7	21.2	46.9	59.1
Whakatane-Kawerau	C	63.7	C	6.3	20.1	59.7
Gisborne	C	62.2	C	9.9	24.6	53.7
Taranaki	58.6	63.6	37.5	17.4	40.6	57.3
Hawke’s Bay	73.6	70.4	59.3	19.4	49.7	67.6
Ruapehu	47.6	34.4	22.0	36.3	32.0	31.2
Manawatu	45.2	55.8	C	C	40.3	C
Whanganui	C	59.9	39.7	C	34.8	C
Wairarapa	C	56.6	C	12.1	25.6	43.4
Kapiti-Horowhenua	C	62.2	C	13.2	21.3	30.4
Wellington	89.8	80.2	C	C	74.7	C
Marlborough	61.3	70.1	44.2	20.9	43.7	57.4
Nelson-Tasman	64.1	68.9	50.8	17.3	37.1	60.3
Canterbury	76.9	71.6	41.8	22.7	49.7	63.2
Hurunui	C	56.2	C	19.1	34.6	47.3
Mackenzie	C	61.0	C	35.6	59.9	71.0
Timaru	C	71.6	C	20.2	37.2	60.1
West Coast	58.6	73.1	45.0	32.5	49.4	56.8
Wanaka	69.2	71.1	67.1	22.0	43.7	68.9
Queenstown	88.7	71.9	77.9	39.2	75.9	82.2
Waitaki	42.7	73.0	39.8	5.5	15.2	53.5
Central Otago	22.0	61.5	20.9	5.6	13.0	37.1
Dunedin	75.3	76.9	44.1	34.3	61.6	68.7
Clutha	C	44.9	C	11.7	20.9	37.1
Fiordland	74.7	69.3	54.6	51.4	60.5	64.9
Southland	45.6	60.2	37.9	21.3	40.4	49.1
Total	77.2	68.2	50.0	18.8	48.6	65.6

(1) Occupancy rates are calculated as the ratio of stay unit nights to monthly capacity.

(2) Occupancy rates excluding holiday parks are included because the capacity of holiday parks can distort the total occupancy rates.

Symbols:

C confidential

... not applicable

6 Local authority area results

Table 6.1 shows results for the individual local authority areas in the Hawke’s Bay RTO area.

Table 6.1

Local Authority and Hawke’s Bay Accommodation Results⁽¹⁾

Accommodation type	November 2017 results				
	Establish-ments	Capacity	Guest Nights	Average stay length	Occupancy rate
	Number			Days	Percent
Hastings District					
Hotels	4	2,610	C	C	C
Motels	32	13,290	15,524	2.09	70.17
Backpackers	5	8,580	C	C	C
Holiday parks	9	18,120	4,991	1.92	12.41
Total	50	42,600	29,446	2.38	44.19
Napier City					
Hotels	9	11,760	16,520	1.65	83.15
Motels	29	20,070	26,436	1.94	72.23
Backpackers	8	14,760	C	C	C
Holiday parks	5	16,020	C	C	C
Total	51	62,610	65,168	2.19	60.33
Wairoa and Central Hawke's Bay Districts					
Hotels	5	1,860	C	C	C
Motels	5	2,280	1,976	1.50	55.68
Backpackers	1	420	C	C	C
Holiday parks	6	10,500	C	C	C
Total	17	15,060	5,757	1.54	21.17
Hawke's Bay Regional Tourism Organisation area					
Hotels	18	16,230	19,497	1.70	73.55
Motels	66	35,640	43,936	1.96	70.40
Backpackers	14	23,760	17,274	4.32	59.26
Holiday parks	20	44,640	19,664	2.44	19.43
Total	118	120,270	100,371	2.19	49.71

(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.

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