



Commercial Accommodation Monitor:

April 2018

Hawke’s Bay

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Preface

Commercial Accommodation Monitor: April 2018 – 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 May 2018 monitor will be released on 11 July 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 April 2018 compared with April 2017:

- Guest nights fell 14.0 percent to 102,898
- International guest nights fell 16.8 percent to 24,702
- Domestic guest nights fell 13.0 percent to 78,196
- The average length of stay fell from 2.45 nights to 2.29 nights
- The overall occupancy rate fell from 47.1 percent to 46.2 percent
- The occupancy rate, excluding holiday parks, was 60.2 percent in April 2018
- Accommodation capacity, excluding holiday parks, fell 10.8 percent.

Response rates for April 2018

The response rate for the Hawke's Bay RTO area was 84 percent for April 2018. However backpacker accommodation had a much lower response rate, which may affect the reliability of their data.

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

Figure 1.1

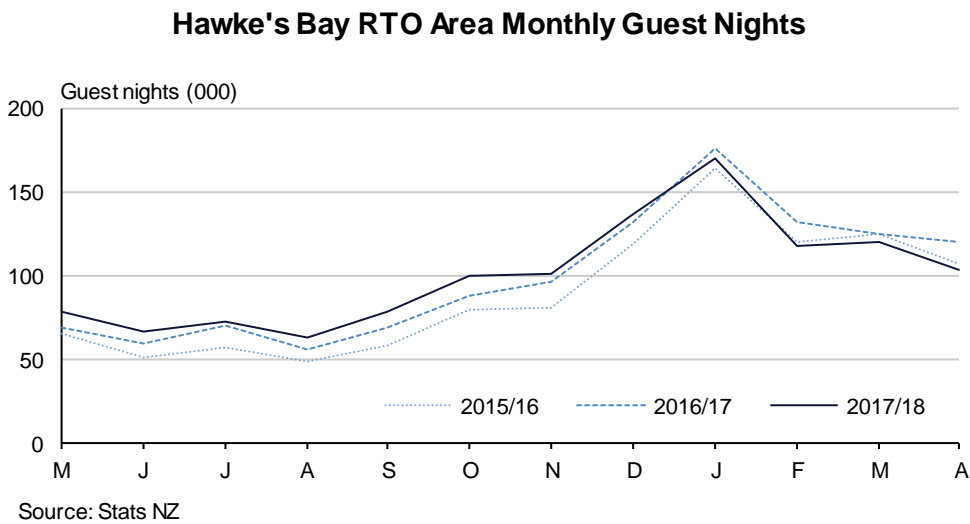
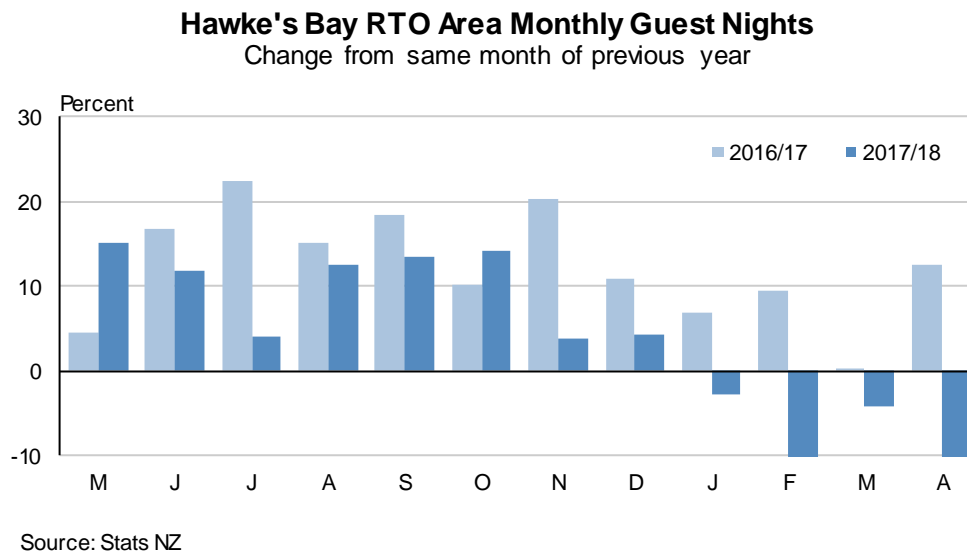


Figure 1.2

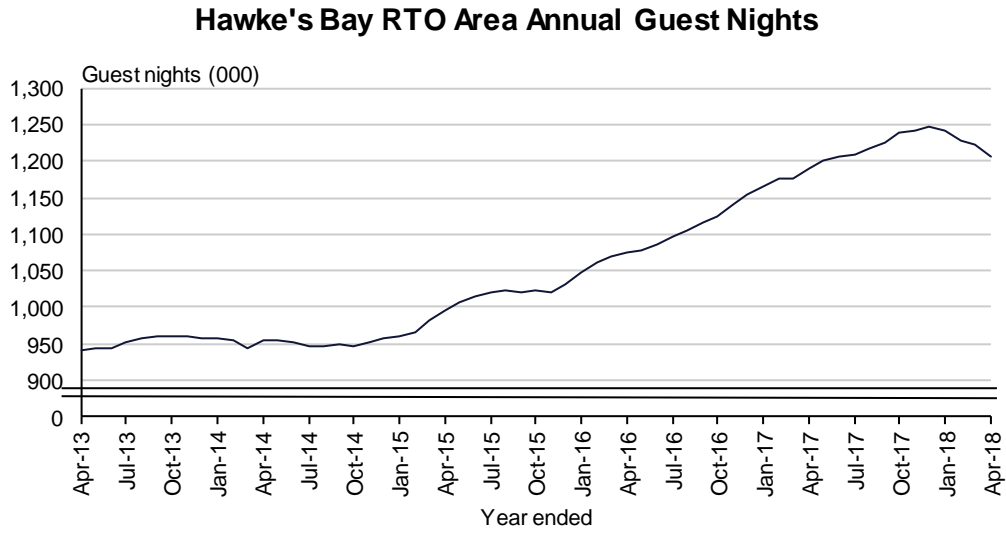


Year ended highlights

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

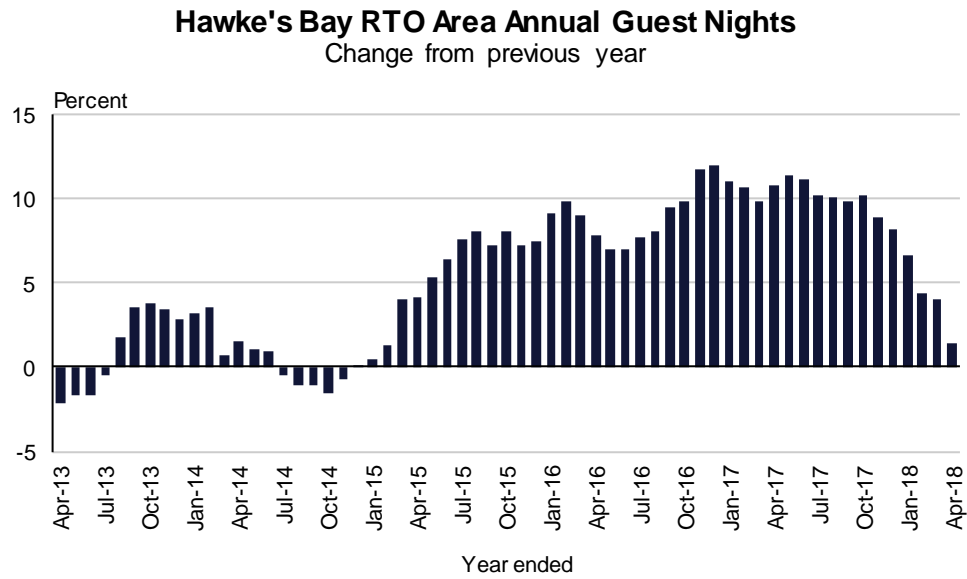
- Guest nights rose 1.4 percent to 1,206,209
- International guest nights rose 1.4 percent to 331,366
- Domestic guest nights rose 1.4 percent to 874,844
- The average length of stay rose from 2.22 nights to 2.27 nights
- The overall occupancy rate rose from 43.5 percent to 45.9 percent
- The occupancy rate, excluding holiday parks, was 59.2 percent for the year ended April 2018
- Accommodation capacity, excluding holiday parks, fell 4.6 percent.

Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

2 Accommodation variables

In April 2018, compared with April 2017, there was a decrease of 14.0 percent in total guest nights for the Hawke's Bay RTO area. Motels had the largest decrease, followed by holiday parks. Hotels had the only increase.

For the year ended April 2018, compared with the previous April year, total guest nights for the Hawke's Bay RTO area increased 1.4 percent. Holiday parks had the largest increase, followed by hotels. Motels had the largest decrease.

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		
	April		Percentage change	Year ended		Percentage change
	2017	2018		April 2017	April 2018	
Guest nights						
Total guest nights	119,633	102,898	-14.0	1,189,439	1,206,209	1.4
International	29,707	24,702	-16.8	326,823	331,366	1.4
Domestic	89,926	78,196	-13.0	862,616	874,844	1.4
Hotels	16,925	18,766	10.9	188,097	208,691	10.9
Motels/apartments	57,793	47,923	-17.1	586,174	549,803	-6.2
Backpackers	15,343	11,123	-27.5	155,690	150,436	-3.4
Holiday parks	29,572	25,086	-15.2	259,478	297,279	14.6
Occupancy rates⁽³⁾ (%)						
Hotels	66.0	66.7	1.1	60.6	63.6	4.9
Motels/apartments	68.7	65.6	-4.5	64.1	66.8	4.3
Backpackers	48.6	45.0	-7.4	44.1	44.2	0.3
Holiday parks	24.9	23.6	-5.0	21.8	23.2	6.4
Total	47.1	46.2	-1.9	43.5	45.9	5.5
Total excluding holiday parks ⁽⁴⁾	61.4	60.2	-1.9	56.9	59.2	3.9
Average length of stay⁽⁵⁾						
Hotels	1.69	1.70	1.0	1.61	1.63	0.9
Motels/apartments	2.30	2.08	-9.5	2.05	2.08	1.4
Backpackers	4.45	5.00	12.4	5.13	3.83	-25.3
Holiday parks	2.90	2.92	0.6	2.54	2.98	17.3
Total	2.45	2.29	-6.4	2.22	2.27	2.0
Guest arrivals						
Hotels	10,043	11,024	9.8	116,624	128,298	10.0
Motels/apartments	25,171	23,059	-8.4	285,684	264,303	-7.5
Backpackers	3,451	2,226	-35.5	30,344	39,271	29.4
Holiday parks	10,194	8,595	-15.7	102,299	99,884	-2.4
Total	48,859	44,905	-8.1	534,950	531,756	-0.6
Establishments						
Hotels	17	19	11.8	17	19	11.8
Motels/apartments	71	66	-7.0	71	66	-7.0
Backpackers	17	12	-29.4	17	12	-29.4
Holiday parks	22	20	-9.1	22	20	-9.1
Total	127	117	-7.9	127	117	-7.9
Capacity⁽⁶⁾						
Hotels	14,970	16,380	9.4	180,501	195,658	8.4
Motels/apartments	37,920	35,460	-6.5	465,461	436,855	-6.1
Backpackers	27,240	19,650	-27.9	310,468	280,254	-9.7
Holiday parks	51,330	44,310	-13.7	596,596	537,871	-9.8
Total	131,460	115,800	-11.9	1,553,026	1,450,638	-6.6

(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:

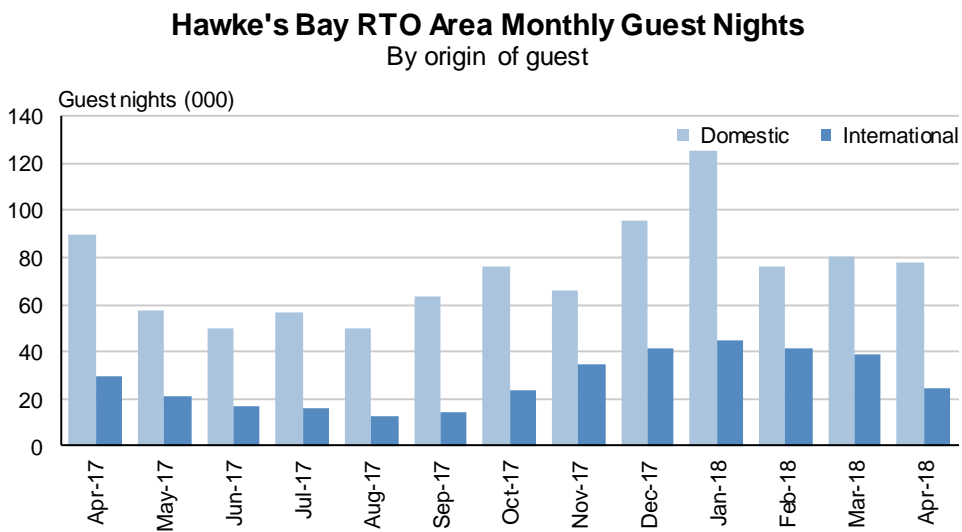
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3 Origin of guests

In April 2018, international guests accounted for 24 percent of all guest nights in the Hawke’s Bay RTO area. When compared with April 2017, the number of international guest nights spent in the area in April 2018 was down 16.8 percent to 24,702. Domestic guest nights decreased 13.0 percent, to 78,196, for the same period.

The proportion of the origin-of-guest estimate from actual data was 77 percent for April 2018.

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								
2017	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	
	Dec	95,474	41,403	136,877	2,215,289	1,926,411	4,141,700	
	2018	Jan	125,345	44,936	170,281	2,851,307	2,117,813	4,969,120
		Feb	75,762	41,693	117,455	1,938,307	2,092,637	4,030,944
		Mar	80,692	39,168	119,860	2,180,388	1,996,067	4,176,455
Apr		78,196	24,702	102,898	1,860,719	1,569,372	3,430,091	
		Percent change from the current month of the previous year						
		-13.0	-16.8	-14.0	-3.4	2.2	-0.9	
Year ended								
April 2017		862,616	326,823	1,189,439	21,919,689	16,721,102	38,640,791	
April 2018		874,844	331,366	1,206,209	22,271,068	17,623,255	39,894,323	
		Percent change from previous year						
		1.4	1.4	1.4	1.6	5.4	3.2	

(1) Regional tourism organisation

4 National results

In April 2018 guest nights were dampened by an earlier Easter weekend. A total of 3,430,000 guest nights were spent in short-term commercial accommodation in New Zealand, a decrease of 32,000 nights (0.9 percent) from April 2017. The North Island recorded a decrease (down 111,000 or 5.4 percent) while the South Island recorded an increase (up 79,000 or 5.5 percent).

Three of the four accommodation types recorded a decrease in guest nights in April 2018, compared with April 2017.

Motels had the largest decrease in guest nights (down 32,000 or 2.9 percent), followed by backpackers (down 15,000 or 3.2 percent), and holiday parks (down 5,000 or 0.8 percent). Hotels had the only increase in guest nights (up 20,000 or 1.7 percent).

For the year ended April 2018, there were 39,894,000 guest nights, an increase of 1,254,000 (3.24 percent) from the previous April year.

Refer to Table 4.1 for comparisons of data.

Table 4.1

Hawke’s Bay and New Zealand Guest Nights					
<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
April month					
Hawke's Bay RTO area					
Hotels	14,631	16,925	18,766	15.7	10.9
Motels	54,467	57,793	47,923	6.1	-17.1
Backpackers	15,835	15,343	11,123	-3.1	-27.5
Holiday parks	21,384	29,572	25,086	38.3	-15.2
Total	106,317	119,633	102,898	12.5	-14.0
New Zealand					
Hotels	1,176,720	1,211,447	1,231,626	3.0	1.7
Motels	1,050,155	1,098,516	1,066,454	4.6	-2.9
Backpackers	455,756	462,266	447,347	1.4	-3.2
Holiday parks	556,948	689,866	684,664	23.9	-0.8
Total	3,239,579	3,462,094	3,430,091	6.9	-0.9
Year ended April					
Hawke's Bay RTO area					
Hotels	157,911	188,097	208,691	19.1	10.9
Motels	537,295	586,174	549,803	9.1	-6.2
Backpackers	150,818	155,690	150,436	3.2	-3.4
Holiday parks	227,760	259,478	297,279	13.9	14.6
Total	1,073,784	1,189,439	1,206,209	10.8	1.4
New Zealand					
Hotels	13,192,382	13,643,421	14,179,684	3.4	3.9
Motels	11,720,194	12,164,449	12,346,076	3.8	1.5
Backpackers	5,097,854	5,167,120	5,166,946	1.4	0.0
Holiday parks	7,333,693	7,665,801	8,201,617	4.5	7.0
Total	37,344,123	38,640,791	39,894,323	3.5	3.2

5 Regional comparison

In April 2018, Auckland recorded the largest decrease in guest nights (down 47,000 or 7.3 percent) from April 2017. This was followed by Bay of Plenty (down 17,000 or 15.1 percent), Hawke's Bay (down 17,000 or 14.0 percent), Waikato (down 15,000 or 11.8 percent), and Northland (down 14,000 or 8.4 percent).

Canterbury recorded the largest increase (up 62,000 or 22.1 percent), followed by Queenstown (up 14,000 or 4.5 percent), Wanaka (up 8,000 or 10.1 percent), Rotorua (up 6,000 or 3.2 percent), and Wellington (up 5,000 or 2.0 percent).

Table 5.1

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

RTO area	April guest nights								
	Domestic			International			Total		
	2017	2018	Percent age change	2017	2018	Percent age change	2017	2018	Percent age change
Northland	107,531	96,550	-10.2	60,411	57,326	-5.1	167,942	153,876	-8.4
Auckland	324,889	299,037	-8.0	322,256	300,629	-6.7	647,146	599,667	-7.3
Coromandel	51,718	52,765	2.0	24,129	25,395	5.2	75,847	78,160	3.1
Waikato	93,918	78,515	-16.4	32,466	32,957	1.5	126,384	111,472	-11.8
Bay of Plenty	81,074	70,892	-12.6	34,827	27,516	-21.0	115,901	98,409	-15.1
Rotorua	103,571	106,277	2.6	92,788	96,291	3.8	196,359	202,568	3.2
Taupo	66,562	60,385	-9.3	39,016	35,174	-9.8	105,578	95,558	-9.5
Whakatane-Kawerau	18,031	15,441	-14.4	5,058	4,760	-5.9	23,089	20,200	-12.5
Gisborne	28,497	28,632	0.5	4,358	4,920	12.9	32,855	33,552	2.1
Taranaki	45,721	49,182	7.6	10,169	9,760	-4.0	55,891	58,942	5.5
Hawke's Bay	89,926	78,196	-13.0	29,707	24,702	-16.8	119,633	102,898	-14.0
Ruapehu	19,479	17,895	-8.1	16,028	13,162	-17.9	35,507	31,057	-12.5
Manawatu	36,857	36,513	-0.9	7,134	7,783	9.1	43,991	44,296	0.7
Whanganui	12,842	14,007	9.1	3,648	2,895	-20.6	16,491	16,902	2.5
Wairarapa	17,990	20,300	12.8	4,423	3,361	-24.0	22,413	23,662	5.6
Kapiti-Horowhenua	22,360	20,660	-7.6	3,201	3,697	15.5	25,561	24,357	-4.7
Wellington	145,215	158,933	9.4	81,323	72,103	-11.3	226,538	231,036	2.0
Marlborough	40,898	40,794	-0.3	32,414	26,197	-19.2	73,312	66,991	-8.6
Nelson-Tasman	72,196	71,198	-1.4	46,816	46,235	-1.2	119,012	117,433	-1.3
Canterbury	148,774	169,923	14.2	133,566	174,691	30.8	282,339	344,615	22.1
Hurunui	27,006	24,606	-8.9	11,686	10,405	-11.0	38,692	35,012	-9.5
Mackenzie	27,547	26,429	-4.1	52,898	57,720	9.1	80,444	84,148	4.6
Timaru	18,692	19,190	2.7	8,677	8,691	0.2	27,369	27,882	1.9
West Coast	46,034	45,983	-0.1	84,566	86,924	2.8	130,600	132,907	1.8
Wanaka	27,215	27,225	0.0	47,616	55,186	15.9	74,831	82,411	10.1
Queenstown	97,098	90,192	-7.1	216,531	237,587	9.7	313,629	327,780	4.5
Waitaki	18,284	18,533	1.4	16,882	17,404	3.1	35,166	35,937	2.2
Central Otago	27,678	23,182	-16.2	9,356	9,595	2.6	37,034	32,777	-11.5
Dunedin	54,966	49,226	-10.4	33,370	36,492	9.4	88,336	85,718	-3.0
Clutha	7,168	5,523	-22.9	3,203	3,499	9.2	10,370	9,022	-13.0
Fiordland	20,591	17,419	-15.4	52,038	58,526	12.5	72,629	75,945	4.6
Southland	25,680	27,116	5.6	15,527	17,788	14.6	41,207	44,904	9.0
Total	1,926,006	1,860,719	-3.4	1,536,088	1,569,372	2.2	3,462,094	3,430,091	-0.9

Table 5.2

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

RTO area	April 2018 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks ⁽²⁾
	Percent					
Northland	52.1	57.0	29.4	14.4	27.5	47.4
Auckland	77.6	62.7	51.4	22.9	62.7	68.3
Coromandel	43.2	45.9	25.8	19.8	25.1	36.7
Waikato	57.1	60.8	36.5	18.6	40.4	53.8
Bay of Plenty	58.8	61.2	47.2	25.4	40.3	55.2
Rotorua	81.5	66.2	35.5	27.5	52.8	59.7
Taupo	59.0	60.1	49.0	18.0	43.2	55.8
Whakatane-Kaw erau	C	54.0	C	7.9	16.9	44.6
Gisborne	C	59.5	C	13.1	25.9	51.5
Taranaki	56.1	61.9	33.5	22.3	41.3	54.9
Haw ke’s Bay	66.7	65.6	45.0	23.6	46.2	60.2
Ruapehu	48.1	23.4	18.7	23.6	26.0	26.5
Manaw atu	42.6	55.1	C	C	39.0	C
Whanganui	C	53.7	45.8	C	33.3	C
Wairarapa	C	60.2	C	15.1	31.2	52.1
Kapiti-Horow henua	C	57.7	C	16.6	24.4	33.3
Wellington	79.8	71.7	C	C	68.2	C
Marlborough	60.7	66.1	44.1	25.9	44.9	56.5
Nelson-Tasman	52.9	56.0	56.5	20.7	36.9	55.7
Canterbury	71.8	64.6	46.1	23.3	48.3	60.9
Hurunui	C	55.8	C	20.2	35.6	48.8
Mackenzie	C	68.3	C	37.3	63.0	76.4
Timaru	C	66.9	C	22.3	38.0	59.1
West Coast	52.9	62.6	42.5	29.1	45.5	52.2
Wanaka	71.5	81.5	76.2	26.4	49.6	75.9
Queenstow n	86.4	69.7	75.4	40.2	74.2	79.8
Waitaki	48.0	64.9	35.3	4.8	14.8	53.0
Central Otago	C	64.5	C	7.8	18.4	49.2
Dunedin	71.1	76.1	47.1	33.7	60.5	67.4
Clutha	C	49.4	C	15.2	25.0	38.7
Fiordland	68.5	71.8	C	C	53.1	C
Southland	47.1	56.9	44.3	21.6	41.8	50.0
Total	70.9	62.0	46.6	20.0	45.8	60.6

(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	April 2018 results				
	Establish-ments	Capacity	Guest Nights	Average stay length	Occupancy rate
	Number			Days	Percent
Hastings District					
Hotels	5	2,760	C	C	C
Motels	33	13,350	19,982	2.66	66.24
Backpackers	4	7,680	C	C	C
Holiday parks	9	17,790	9,963	C	29.18
Total	51	41,580	36,307	2.81	44.77
Napier City					
Hotels	9	11,760	15,170	1.65	74.92
Motels	28	19,830	25,737	1.81	66.04
Backpackers	7	11,550	7,578	4.23	50.55
Holiday parks	5	16,020	11,882	3.58	24.83
Total	49	59,160	60,367	2.12	53.62
Wairoa and Central Hawke's Bay Districts					
Hotels	5	1,860	C	C	C
Motels	5	2,280	2,204	1.64	58.16
Backpackers	1	420	C	C	C
Holiday parks	6	10,500	3,242	C	12.28
Total	17	15,060	6,224	1.80	20.98
Hawke's Bay Regional Tourism Organisation area					
Hotels	19	16,380	18,766	1.70	66.69
Motels	66	35,460	47,923	2.08	65.61
Backpackers	12	19,650	11,123	5.00	45.05
Holiday parks	20	44,310	25,086	2.92	23.60
Total	117	115,800	102,898	2.29	46.20

(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