



Commercial Accommodation Monitor:

December 2017

Hawke’s Bay

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Preface

Commercial Accommodation Monitor: December 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 January 2017 monitor will be released on 12 March 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 December 2017 compared with December 2016:

- Guest nights rose 4.2 percent to 136,877
- International guest nights rose 5.6 percent to 41,403
- Domestic guest nights rose 3.6 percent to 95,474
- The average length of stay rose from 2.16 nights to 2.32 nights
- The overall occupancy rate rose from 51.8 percent to 55.8 percent
- The occupancy rate, excluding holiday parks, was 65.8 percent in December 2017
- Accommodation capacity, excluding holiday parks, fell 4.7 percent.

Response rates for December 2017

The response rate for the Hawke’s Bay RTO area was 78 percent for December 2017. However, holiday parks 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 69 percent.

Figure 1.1

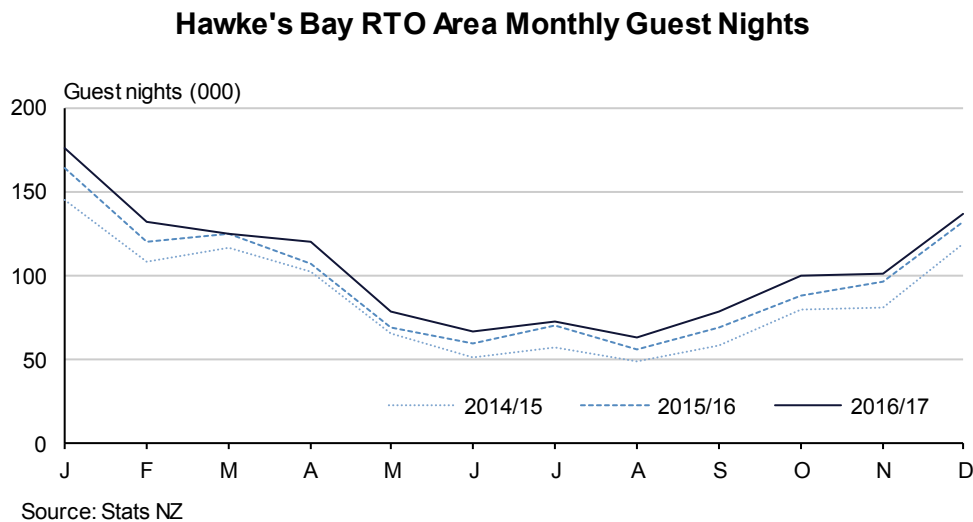
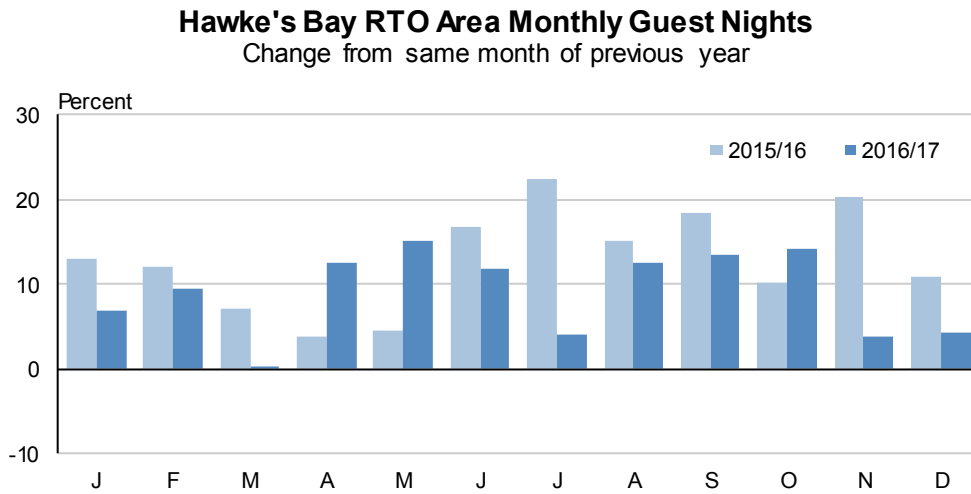


Figure 1.2



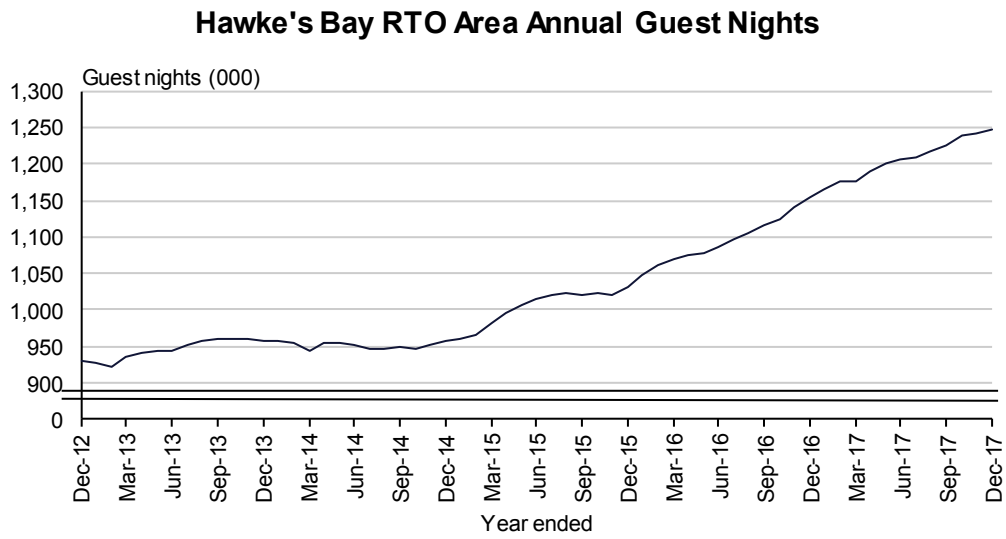
Source: Stats NZ

Year ended highlights

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

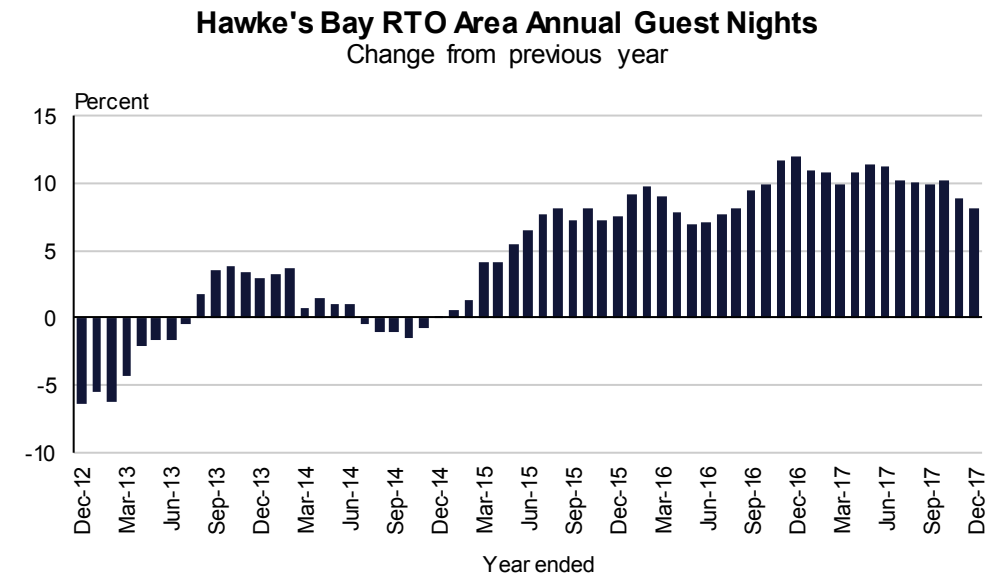
- Guest nights rose 8.2 percent to 1,247,406
- International guest nights rose 7.5 percent to 342,653
- Domestic guest nights rose 8.4 percent to 904,753
- The average length of stay rose from 2.21 nights to 2.28 nights
- The overall occupancy rate rose from 41.8 percent to 46.5 percent
- The occupancy rate, excluding holiday parks, was 60.0 percent for the year ended December 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 December 2017, compared with December 2016, there was an increase of 4.2 percent in total guest nights for the Hawke's Bay RTO area. Hotels had the largest increase, followed by holiday parks. Motels had the only decrease.

For the year ended December 2017, compared with the previous December year, total guest nights for the Hawke's Bay RTO area increased 8.2 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		
	December		Percentage change	Year ended		Percentage change
	2016	2017		December 2016	December 2017	
Guest nights						
Total guest nights	131,372	136,877	4.2	1,153,203	1,247,406	8.2
International	39,200	41,403	5.6	318,843	342,653	7.5
Domestic	92,172	95,474	3.6	834,360	904,753	8.4
Hotels	16,370	19,400	18.5	175,586	203,586	15.9
Motels/apartments	54,550	53,782	-1.4	579,751	585,132	0.9
Backpackers	18,064	18,304	1.3	153,352	164,742	7.4
Holiday parks	42,388	45,391	7.1	244,514	293,946	20.2
Occupancy rates⁽³⁾ (%)						
Hotels	60.5	63.0	4.0	57.7	63.6	10.3
Motels/apartments	67.6	67.8	0.3	62.3	67.8	8.9
Backpackers	57.7	64.6	11.9	43.9	46.0	4.7
Holiday parks	34.8	39.3	12.6	19.8	24.4	23.1
Total	51.8	55.8	7.7	41.8	46.5	11.3
Total excluding holiday parks ⁽⁴⁾	63.1	65.8	4.2	55.4	60.0	8.2
Average length of stay⁽⁵⁾						
Hotels	1.48	1.63	9.9	1.70	1.57	-7.3
Motels/apartments	1.94	2.01	3.5	2.02	2.10	4.3
Backpackers	5.84	3.76	-35.6	5.21	4.41	-15.4
Holiday parks	2.27	2.92	28.3	2.43	2.85	17.3
Total	2.16	2.32	7.3	2.21	2.28	2.8
Guest arrivals						
Hotels	11,048	11,915	7.9	103,423	129,320	25.0
Motels/apartments	28,051	26,711	-4.8	287,405	278,059	-3.3
Backpackers	3,093	4,869	57.4	29,415	37,347	27.0
Holiday parks	18,641	15,559	-16.5	100,778	103,248	2.5
Total	60,833	59,055	-2.9	521,020	547,974	5.2
Establishments						
Hotels	17	19	11.8	17	19	11.8
Motels/apartments	73	67	-8.2	73	67	-8.2
Backpackers	17	14	-17.6	17	14	-17.6
Holiday parks	22	21	-4.5	22	21	-4.5
Total	129	121	-6.2	129	121	-6.2
Capacity⁽⁶⁾						
Hotels	15,376	16,926	10.1	183,181	189,925	3.7
Motels/apartments	39,401	36,859	-6.5	472,430	447,012	-5.4
Backpackers	25,761	23,002	-10.7	313,985	298,070	-5.1
Holiday parks	53,351	46,159	-13.5	602,021	568,257	-5.6
Total	133,889	122,946	-8.2	1,571,617	1,503,264	-4.3

(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:

C confidential

3 Origin of guests

In December 2017, international guests accounted for 30.2 percent of all guest nights in the Hawke's Bay RTO area. When compared with December 2016, the number of international guest nights spent in the area in December 2017 was up 5.6 percent to 41,403. Domestic guest nights increased 3.6 percent, to 95,474, for the same period. The proportion of the origin-of-guest estimate from actual data was 69 percent for December 2017.

Figure 3.1

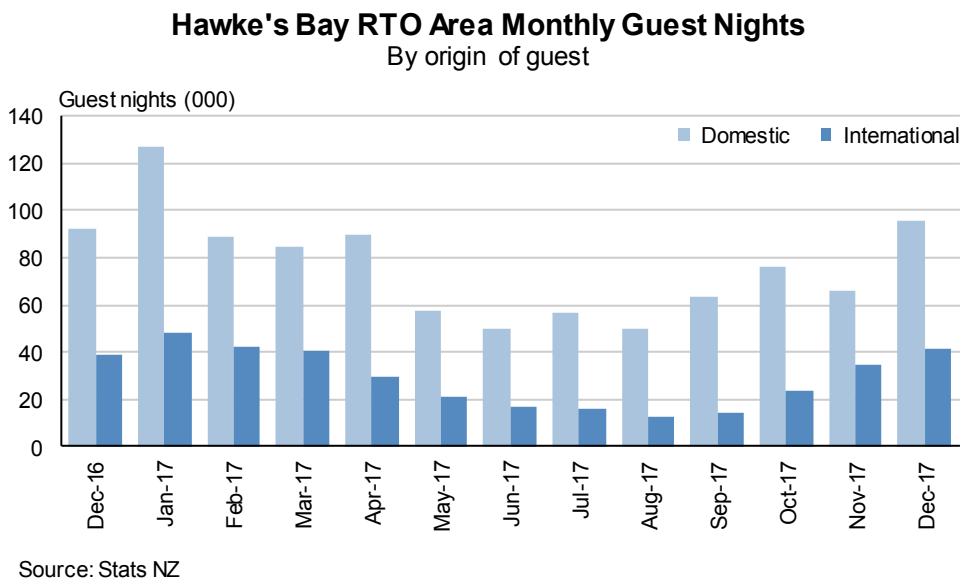


Table 3.1

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	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
	Dec	95,474	41,403	136,877	2,215,289	1,926,411	4,141,700
		Percent change from the current month of the previous year					
		3.6	5.6	4.2	2.1	6.2	4.0
Year ended							
	December 2016	834,360	318,843	1,153,203	22,050,224	16,450,674	38,500,897
	December 2017	904,753	342,653	1,247,406	22,225,169	17,239,262	39,464,431
		Percent change from previous year					
		8.4	7.5	8.2	0.8	4.8	2.5

(1) Regional tourism organisation

4 National results

In December 2017, a total of 4,142,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 158,000 nights (4.0 percent) from December 2016. Both the North Island (up 50,000 or 2.1 percent) and South Island (up 109,000 or 6.5 percent) recorded an increase.

All four accommodation types recorded an increase in guest nights in December 2017, compared with December 2016. Holiday parks had the largest increase in guest nights (up 78,000 or 7.2 percent), hotels (up 66,000 or 5.3 percent), motels (up 10,000 or 0.8 percent), and backpackers (up 5,000 or 1.0 percent).

For the year ended December 2017, there were 39,464,000 guest nights, an increase of 964,000 (2.5 percent) from the previous December 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
December month					
Hawke's Bay RTO area					
Hotels	13,897	16,370	19,400	17.8	18.5
Motels	50,955	54,550	53,782	7.1	-1.4
Backpackers	19,335	18,064	18,304	-6.6	1.3
Holiday parks	34,393	42,388	45,391	23.2	7.1
Total	118,580	131,372	136,877	10.8	4.2
New Zealand					
Hotels	1,209,611	1,237,791	1,303,962	2.3	5.3
Motels	1,101,282	1,156,389	1,166,005	5.0	0.8
Backpackers	509,125	507,624	512,453	-0.3	1.0
Holiday parks	1,031,851	1,081,525	1,159,280	4.8	7.2
Total	3,851,869	3,983,330	4,141,700	3.4	4.0
Year ended December					
Hawke's Bay RTO area					
Hotels	153,143	175,586	203,586	14.7	15.9
Motels	537,723	579,751	585,132	7.8	0.9
Backpackers	139,109	153,352	164,742	10.2	7.4
Holiday parks	200,137	244,514	293,946	22.2	20.2
Total	1,030,112	1,153,203	1,247,406	11.9	8.2
New Zealand					
Hotels	12,831,880	13,606,865	13,932,801	6.0	2.4
Motels	11,463,575	12,128,919	12,359,189	5.8	1.9
Backpackers	4,934,375	5,154,200	5,210,060	4.5	1.1
Holiday parks	7,024,064	7,610,913	7,962,381	8.4	4.6
Total	36,253,894	38,500,897	39,464,431	6.2	2.5

5 Regional comparison

In December 2017, Canterbury recorded the largest increase in guest nights (up 61,000 or 18.6 percent) from December 2016. This was followed by Taupo (up 16,000 or 14.1 percent), Rotorua (up 14,000 or 6.1 percent), Northland (up 13,000 or 5.2 percent), and Queenstown (up 12,000 or 3.6 percent).

Auckland recorded the largest decrease (down 4,000 or 0.7 percent), followed by Kapiti-Horowhenua (down 4,000 or 12.7 percent), Timaru (down 4,000 or 10.1 percent), Coromandel (down 3,000 or 2.7 percent), and Marlborough (down 3,000 or 3.4 percent).

Table 5.1

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

RTO area	December guest nights								
	Domestic			International			Total		
	2016	2017	Percent age change	2016	2017	Percent age change	2016	2017	Percent age change
Northland	160,816	172,990	7.6	79,815	80,171	0.4	240,630	253,161	5.2
Auckland	351,013	334,905	-4.6	316,831	328,564	3.7	667,845	663,469	-0.7
Coromandel	87,851	83,579	-4.9	37,609	38,501	2.4	125,460	122,080	-2.7
Waikato	96,189	95,372	-0.8	42,181	47,667	13.0	138,369	143,039	3.4
Bay of Plenty	94,830	93,703	-1.2	36,338	36,549	0.6	131,168	130,251	-0.7
Rotorua	94,176	108,310	15.0	129,410	128,902	-0.4	223,585	237,211	6.1
Taupo	65,892	74,720	13.4	47,524	54,637	15.0	113,416	129,357	14.1
Whakatane-Kawerau	29,382	32,399	10.3	8,633	8,224	-4.7	38,015	40,623	6.9
Gisborne	41,157	38,859	-5.6	6,164	7,648	24.1	47,321	46,507	-1.7
Taranaki	53,797	56,378	4.8	13,189	14,140	7.2	66,986	70,518	5.3
Hawke's Bay	92,172	95,474	3.6	39,200	41,403	5.6	131,372	136,877	4.2
Ruapehu	22,785	23,913	4.9	21,485	22,112	2.9	44,271	46,025	4.0
Manawatu	37,330	35,879	-3.9	5,860	7,451	27.1	43,191	43,331	0.3
Whanganui	16,495	13,290	-19.4	4,405	5,424	23.1	20,900	18,713	-10.5
Wairarapa	20,585	20,217	-1.8	6,062	5,604	-7.6	26,647	25,821	-3.1
Kapiti-Horowhenua	29,175	25,052	-14.1	5,206	4,957	-4.8	34,381	30,009	-12.7
Wellington	140,317	143,605	2.3	86,092	89,162	3.6	226,409	232,767	2.8
Marlborough	41,415	42,391	2.4	38,642	34,933	-9.6	80,056	77,325	-3.4
Nelson-Tasman	113,618	115,477	1.6	71,305	71,665	0.5	184,923	187,142	1.2
Canterbury	156,730	189,450	20.9	169,003	196,972	16.5	325,733	386,423	18.6
Hurunui	25,900	23,547	-9.1	11,351	15,159	33.6	37,250	38,706	3.9
Mackenzie	22,023	23,407	6.3	63,207	62,737	-0.7	85,230	86,144	1.1
Timaru	27,351	22,129	-19.1	9,713	11,187	15.2	37,065	33,317	-10.1
West Coast	50,412	49,846	-1.1	113,811	115,647	1.6	164,222	165,493	0.8
Wanaka	39,320	44,648	13.6	55,737	61,401	10.2	95,057	106,049	11.6
Queenstown	95,116	91,943	-3.3	245,160	260,528	6.3	340,276	352,472	3.6
Waitaki	30,204	31,263	3.5	19,106	20,747	8.6	49,310	52,010	5.5
Central Otago	37,121	39,032	5.1	11,615	9,949	-14.3	48,735	48,981	0.5
Dunedin	46,976	42,962	-8.5	38,074	46,993	23.4	85,050	89,955	5.8
Clutha	5,017	6,230	24.2	3,910	4,134	5.7	8,928	10,364	16.1
Fiordland	21,495	21,139	-1.7	59,704	71,569	19.9	81,199	92,708	14.2
Southland	22,826	23,178	1.5	17,501	21,676	23.9	40,327	44,854	11.2
Total	2,169,488	2,215,289	2.1	1,813,842	1,926,411	6.2	3,983,330	4,141,700	4.0

Table 5.2

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

RTO area	December 2017 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks ⁽²⁾
	Percent					
Northland	59.9	64.6	54.9	29.0	41.4	60.4
Auckland	79.2	63.6	55.0	29.9	65.1	70.3
Coromandel	51.5	55.5	42.3	28.9	35.2	49.0
Waikato	60.2	63.6	46.6	32.0	48.4	58.5
Bay of Plenty	57.9	65.0	51.5	34.3	46.3	58.3
Rotorua	79.8	70.5	36.1	37.9	55.1	59.6
Taupo	59.5	65.9	53.1	37.0	52.5	59.7
Whakatane-Kaw erau	C	59.7	C	21.2	29.6	55.6
Gisborne	C	60.9	C	21.3	31.9	52.9
Taranaki	50.7	45.8	31.9	33.4	40.2	45.1
Haw ke’s Bay	63.0	67.8	64.6	39.3	55.8	65.8
Ruapehu	46.2	37.5	24.1	53.0	36.2	32.8
Manaw atu	39.4	43.9	C	C	36.0	C
Whanganui	C	45.4	44.8	C	33.9	C
Wairarapa	C	52.9	C	18.3	30.0	45.4
Kapiti-Horow henua	C	57.4	C	23.1	28.9	37.3
Wellington	71.3	65.9	C	C	62.0	C
Marlborough	55.9	66.2	44.9	30.8	46.2	56.0
Nelson-Tasman	60.9	64.2	60.7	32.8	46.4	62.2
Canterbury	70.3	63.6	39.8	33.0	49.5	57.7
Hurunui	C	51.8	C	28.9	36.6	43.1
Mackenzie	C	51.9	C	55.0	66.1	71.1
Timaru	C	62.1	C	29.8	40.0	53.6
West Coast	55.1	66.7	51.8	43.1	52.9	56.9
Wanaka	67.5	77.4	76.6	44.0	57.8	73.7
Queenstow n	87.3	72.8	83.7	52.9	79.2	83.6
Waitaki	42.9	62.2	38.0	12.6	20.1	49.4
Central Otago	24.6	58.0	54.0	19.9	26.2	47.8
Dunedin	65.2	69.1	49.3	43.3	58.9	63.0
Clutha	C	38.8	C	18.1	25.5	35.8
Fiordland	72.3	67.3	61.3	56.2	62.9	66.5
Southland	43.7	48.6	45.8	26.3	40.6	46.3
Total	70.5	62.1	50.8	31.1	50.4	61.6

(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	December 2017 results				
	Establish-ments	Capacity	Guest Nights	Average stay length	Occupancy rate
	Number			Days	Percent
Hastings District					
Hotels	5	2,852	C	C	C
Motels	33	13,764	19,553	2.22	65.99
Backpackers	5	8,928	C	C	C
Holiday parks	10	18,755	18,806	2.65	42.01
Total	53	44,299	47,839	2.42	54.31
Napier City					
Hotels	9	12,152	15,200	1.69	67.89
Motels	29	20,739	31,719	1.94	70.37
Backpackers	8	13,640	11,911	3.74	68.87
Holiday parks	5	16,554	19,722	4.08	44.89
Total	51	63,085	78,551	2.35	62.88
Wairoa and Central Hawke's Bay Districts					
Hotels	5	1,922	C	C	C
Motels	5	2,356	2,510	1.62	55.05
Backpackers	1	434	C	C	C
Holiday parks	6	10,850	6,863	1.89	25.90
Total	17	15,562	10,486	1.78	31.39
Hawke's Bay Regional Tourism Organisation area					
Hotels	19	16,926	19,400	1.63	62.96
Motels	67	36,859	53,782	2.01	67.76
Backpackers	14	23,002	18,304	3.76	64.60
Holiday parks	21	46,159	45,391	2.92	39.26
Total	121	122,946	136,877	2.32	55.81

(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