



Commercial Accommodation Monitor:

May 2018

Hawke’s Bay

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Preface

Commercial Accommodation Monitor: May 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 June 2018 monitor will be released on 10 August 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 May 2018 compared with May 2017:

- Guest nights fell 0.9 percent to 77,866
- International guest nights fell 16.6 percent to 17,354
- Domestic guest nights rose 4.7 percent to 60,512
- The average length of stay rose from 2.23 nights to 2.24 nights
- The overall occupancy rate rose from 37.2 percent to 38.4 percent
- The occupancy rate, excluding holiday parks, was 54.7 percent in May 2018
- Accommodation capacity, excluding holiday parks, fell 8.5 percent.

Response rates for May 2018

The response rate for the Hawke's Bay RTO area was 87 percent for May 2018.

The proportion of the origin-of-guest estimate from unadjusted data was 79 percent.

Figure 1.1

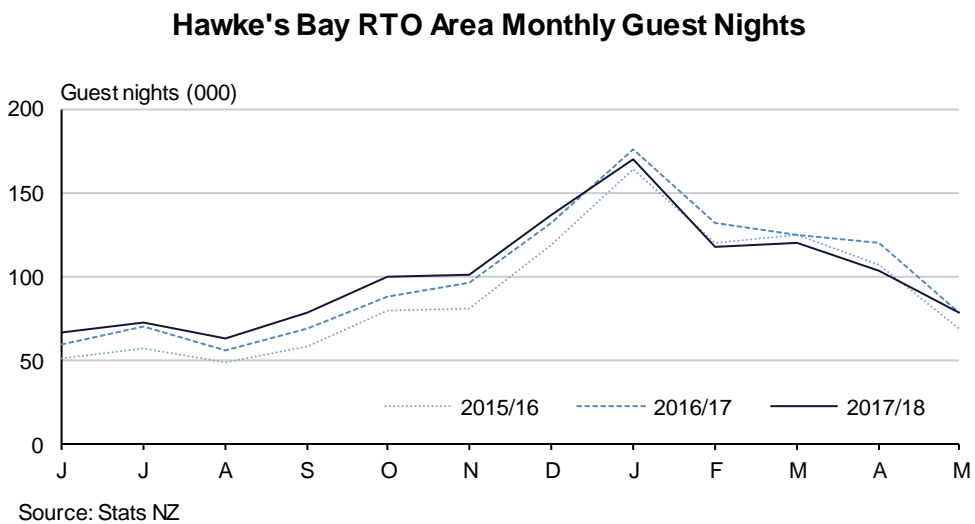
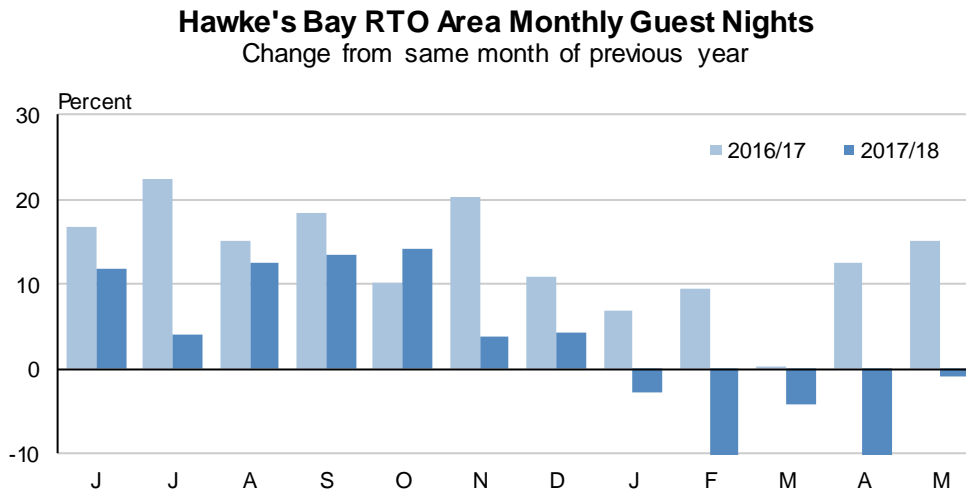


Figure 1.2



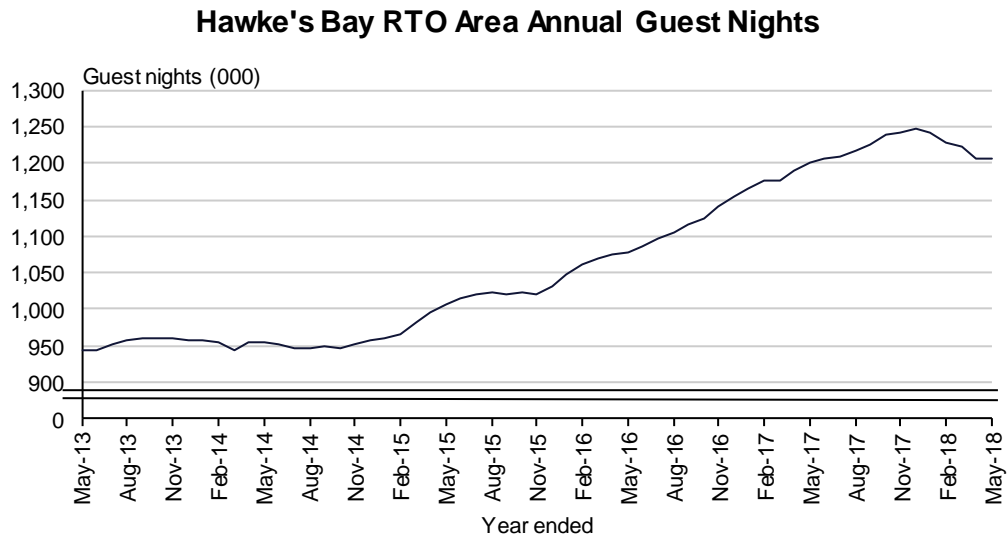
Source: Stats NZ

Year ended highlights

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

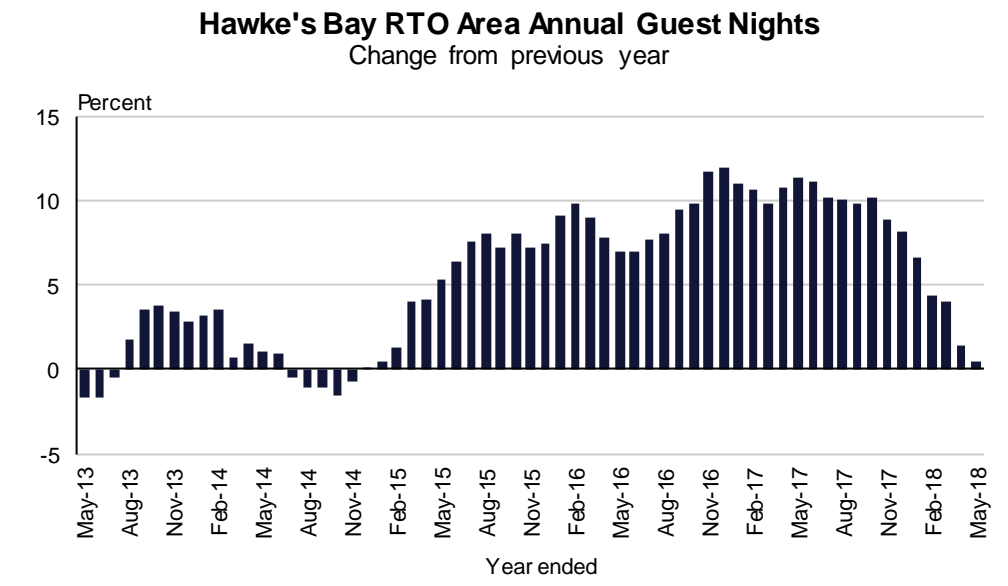
- Guest nights rose 0.5 percent to 1,205,482
- International guest nights fell 0.4 percent to 327,900
- Domestic guest nights rose 0.8 percent to 877,582
- The average length of stay rose from 2.23 nights to 2.27 nights
- The overall occupancy rate rose from 44.1 percent to 46.0 percent
- The occupancy rate, excluding holiday parks, was 59.5 percent for the year ended May 2018
- Accommodation capacity, excluding holiday parks, fell 5.2 percent.

Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

2 Accommodation variables

In May 2018, compared with May 2017, there was a decrease of 0.9 percent in total guest nights for the Hawke's Bay RTO area. Backpackers had the largest decrease, followed by motels. Hotels had the largest increase.

For the year ended May 2018, compared with the previous May year, total guest nights for the Hawke's Bay RTO area increased 0.5 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		
	May		Percentage change	Year ended		Percentage change
	2017	2018		May 2017	May 2018	
Guest nights						
Total guest nights	78,592	77,866	-0.9	1,199,747	1,205,482	0.5
International	20,819	17,354	-16.6	329,119	327,900	-0.4
Domestic	57,774	60,512	4.7	870,628	877,582	0.8
Hotels	13,422	15,556	15.9	189,577	210,826	11.2
Motels/apartments	42,348	42,030	-0.7	592,269	549,486	-7.2
Backpackers	11,992	9,090	-24.2	158,150	147,534	-6.7
Holiday parks	10,831	11,189	3.3	259,752	297,637	14.6
Occupancy rates⁽³⁾ (%)						
Hotels	58.3	57.5	-1.4	61.2	63.5	3.6
Motels/apartments	59.9	64.3	7.3	65.1	67.2	3.3
Backpackers	37.0	35.8	-3.2	44.5	44.3	-0.3
Holiday parks	11.6	11.7	0.8	22.1	23.2	5.3
Total	37.2	38.4	3.2	44.1	46.0	4.4
Total excluding holiday parks ⁽⁴⁾	51.7	54.7	5.7	57.6	59.5	3.2
Average length of stay⁽⁵⁾						
Hotels	1.50	1.67	11.6	1.60	1.64	2.3
Motels/apartments	2.12	2.20	3.9	2.06	2.09	1.2
Backpackers	4.42	3.55	-19.8	5.06	3.77	-25.5
Holiday parks	3.03	2.93	-3.5	2.57	2.97	15.9
Total	2.23	2.24	0.3	2.23	2.27	1.8
Guest arrivals						
Hotels	8,968	9,317	3.9	118,285	128,646	8.8
Motels/apartments	19,981	19,096	-4.4	287,450	263,418	-8.4
Backpackers	2,713	2,563	-5.5	31,250	39,121	25.2
Holiday parks	3,572	3,825	7.1	101,267	100,136	-1.1
Total	35,235	34,800	-1.2	538,252	531,322	-1.3
Establishments						
Hotels	17	19	11.8	17	19	11.8
Motels/apartments	70	66	-5.7	70	66	-5.7
Backpackers	17	13	-23.5	17	13	-23.5
Holiday parks	20	21	5.0	20	21	5.0
Total	124	119	-4.0	124	119	-4.0
Capacity⁽⁶⁾						
Hotels	15,469	16,926	9.4	181,400	197,115	8.7
Motels/apartments	38,161	36,642	-4.0	463,012	435,336	-6.0
Backpackers	28,148	21,297	-24.3	311,274	273,403	-12.2
Holiday parks	46,562	45,787	-1.7	589,466	537,096	-8.9
Total	128,340	120,652	-6.0	1,545,152	1,442,950	-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:

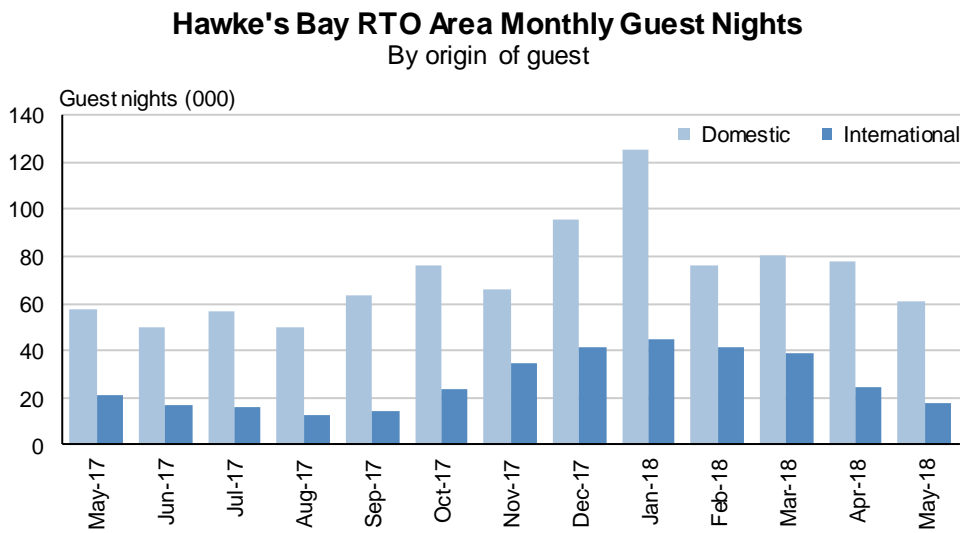
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3 Origin of guests

In May 2018, international guests accounted for 22.3 percent of all guest nights in the Hawke’s Bay RTO area. When compared with May 2017, the number of international guest nights spent in the area in May 2018 was down 16.6 percent to 17,354. Domestic guest nights increased 4.7 percent, to 60,512, for the same period.

The proportion of the origin-of-guest estimate from actual data was 79 percent for May 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	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
May		60,512	17,354	77,866	1,493,682	1,047,474	2,541,156	
		Percent change from the current month of the previous year						
		4.7	-16.6	-0.9	2.5	0.4	1.6	
Year ended								
May 2017		870,628	329,119	1,199,747	22,007,344	16,804,598	38,811,942	
May 2018		877,582	327,900	1,205,482	22,306,970	17,627,681	39,934,652	
		Percent change from previous year						
		0.8	-0.4	0.5	1.4	4.9	2.9	

(1) Regional tourism organisation

4 National results

In May 2018, a total of 2,541,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 40,000 nights (1.6 percent) from May 2017. Both the North Island (up 2,000 or 0.2 percent) and South Island (up 38,000 or 4.1 percent) recorded an increase.

Three of the four accommodation types recorded an increase in guest nights in May 2018, compared with May 2017. Hotels had the largest increase in guest nights (up 37,000 or 3.6 percent), followed by motels (up 10,000 or 1.3 percent), and holiday parks (up 6,000 or 1.7 percent). Backpackers had the only decrease in guest nights (down 13,000 or 3.7 percent).

For the year ended May 2018, there were 39,935,000 guest nights, an increase of 1,123,000 (2.89 percent) from the previous May 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
May month					
Hawke's Bay RTO area					
Hotels	11,942	13,422	15,556	12.4	15.9
Motels	36,253	42,348	42,030	16.8	-0.7
Backpackers	9,532	11,992	9,090	25.8	-24.2
Holiday parks	10,557	10,831	11,189	2.6	3.3
Total	68,285	78,592	77,866	15.1	-0.9
New Zealand					
Hotels	962,147	1,009,132	1,045,838	4.9	3.6
Motels	719,915	790,712	801,086	9.8	1.3
Backpackers	337,804	346,181	333,259	2.5	-3.7
Holiday parks	309,810	354,802	360,974	14.5	1.7
Total	2,329,676	2,500,827	2,541,156	7.3	1.6
Year ended May					
Hawke's Bay RTO area					
Hotels	156,239	189,577	210,826	21.3	11.2
Motels	539,019	592,269	549,486	9.9	-7.2
Backpackers	150,945	158,150	147,534	4.8	-6.7
Holiday parks	230,535	259,752	297,637	12.7	14.6
Total	1,076,737	1,199,747	1,205,482	11.4	0.5
New Zealand					
Hotels	13,218,787	13,690,406	14,216,390	3.6	3.8
Motels	11,684,060	12,235,245	12,356,450	4.7	1.0
Backpackers	5,096,420	5,175,497	5,154,024	1.6	-0.4
Holiday parks	7,336,154	7,710,793	8,207,789	5.1	6.4
Total	37,335,422	38,811,942	39,934,652	4.0	2.9

5 Regional comparison

In May 2018, Canterbury recorded the largest increase in guest nights (up 23,000 or 10.5 percent) from May 2017. This was followed by Queenstown (up 12,000 or 5.7 percent), Rotorua (up 9,000 or 6.7 percent), Taupo (up 5,000 or 8.4 percent), and Taranaki (up 5,000 or 11.4 percent).

Auckland recorded the largest decrease (down 20,000 or 3.4 percent), followed by Marlborough (down 6,000 or 12.0 percent), Mackenzie (down 5,000 or 7.9 percent), Central Otago (down 2,000 or 14.0 percent), and Kapiti-Horowhenua (down 2,000 or 13.3 percent).

Table 5.1

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

RTO area	May guest nights								
	Domestic			International			Total		
	2017	2018	Percent age change	2017	2018	Percent age change	2017	2018	Percent age change
Northland	64,460	72,853	13.0	42,376	36,087	-14.8	106,837	108,940	2.0
Auckland	322,517	301,848	-6.4	256,771	257,500	0.3	579,288	559,348	-3.4
Coromandel	29,208	27,084	-7.3	11,377	12,276	7.9	40,585	39,360	-3.0
Waikato	71,888	74,566	3.7	23,061	21,430	-7.1	94,949	95,996	1.1
Bay of Plenty	57,200	56,245	-1.7	24,741	24,125	-2.5	81,941	80,370	-1.9
Rotorua	73,193	76,852	5.0	66,697	72,423	8.6	139,890	149,276	6.7
Taupo	36,038	40,008	11.0	19,903	20,614	3.6	55,941	60,622	8.4
Whakatane-									
Kaw erau	11,828	10,676	-9.7	3,165	2,779	-12.2	14,992	13,455	-10.3
Gisborne	22,858	22,911	0.2	3,409	3,183	-6.6	26,267	26,094	-0.7
Taranaki	31,473	37,145	18.0	8,908	7,859	-11.8	40,380	45,004	11.4
Haw ke's Bay	57,774	60,512	4.7	20,819	17,354	-16.6	78,592	77,866	-0.9
Ruapehu	12,223	13,828	13.1	6,665	5,999	-10.0	18,888	19,826	5.0
Manaw atu	36,034	37,923	5.2	5,750	5,299	-7.8	41,784	43,222	3.4
Whanganui	9,409	11,966	27.2	2,403	1,882	-21.7	11,812	13,848	17.2
Wairarapa	11,082	14,371	29.7	2,370	1,807	-23.8	13,452	16,178	20.3
Kapiti-Horow henua	14,233	12,758	-10.4	2,858	2,067	-27.7	17,091	14,825	-13.3
Wellington	138,364	148,275	7.2	66,404	57,318	-13.7	204,768	205,593	0.4
Marlborough	30,727	30,496	-0.8	18,007	12,386	-31.2	48,734	42,882	-12.0
Nelson-Tasman	46,117	49,499	7.3	24,897	24,636	-1.0	71,014	74,135	4.4
Canterbury	127,445	134,963	5.9	92,286	107,894	16.9	219,731	242,857	10.5
Hurunui	15,018	15,593	3.8	7,263	5,881	-19.0	22,281	21,474	-3.6
Mackenzie	18,910	14,757	-22.0	40,403	39,896	-1.3	59,313	54,653	-7.9
Timaru	12,596	13,413	6.5	6,255	4,923	-21.3	18,851	18,336	-2.7
West Coast	25,102	23,576	-6.1	46,220	48,851	5.7	71,323	72,428	1.5
Wanaka	12,803	13,428	4.9	25,932	29,380	13.3	38,735	42,808	10.5
Queenstow n	66,649	73,835	10.8	147,186	152,295	3.5	213,835	226,130	5.7
Waitaki	9,835	10,900	10.8	9,711	11,117	14.5	19,545	22,017	12.6
Central Otago	11,196	10,157	-9.3	5,000	3,772	-24.6	16,196	13,929	-14.0
Dunedin	45,573	46,042	1.0	19,048	21,364	12.2	64,621	67,406	4.3
Clutha	4,211	3,720	-11.6	1,320	1,328	0.6	5,531	5,048	-8.7
Fiordland	8,706	10,330	18.6	24,508	25,011	2.1	33,214	35,341	6.4
Southland	23,109	23,153	0.2	7,338	8,738	19.1	30,446	31,891	4.7
Total	1,457,780	1,493,682	2.5	1,043,047	1,047,474	0.4	2,500,827	2,541,156	1.6

Table 5.2

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

RTO area	May 2018 occupancy rate					
	Accommodation type					Total excluding holiday parks ⁽²⁾
	Hotels	Motels	Backpackers	Holiday parks	Total	
	Percent					
Northland	37.5	52.8	22.4	10.4	21.8	39.3
Auckland	77.7	59.7	44.3	16.1	60.0	66.1
Coromandel	38.0	31.0	21.4	10.2	15.6	27.6
Waikato	59.3	60.3	32.0	12.0	37.6	53.0
Bay of Plenty	54.7	56.1	47.0	20.2	36.2	52.3
Rotorua	70.4	48.8	25.8	16.4	40.9	47.5
Taupo	41.3	42.1	34.6	10.0	29.6	39.0
Whakatane-Kaw erau	C	47.9	C	4.6	13.0	39.1
Gisborne	C	53.8	C	9.6	22.6	46.6
Taranaki	53.0	56.6	26.0	11.8	34.0	49.9
Haw ke's Bay	57.5	64.3	35.8	11.7	38.4	54.7
Ruapehu	39.3	21.9	13.4	10.5	19.8	21.8
Manaw atu	44.9	57.4	C	C	40.4	C
Whanganui	C	51.3	50.4	C	31.2	C
Wairarapa	39.7	46.7	C	C	22.5	C
Kapiti-Horow henua	C	52.7	C	11.8	16.7	23.9
Wellington	77.5	71.4	C	C	64.0	C
Marlborough	39.3	54.8	22.4	14.3	29.9	39.7
Nelson-Tasman	42.5	45.8	40.2	9.7	25.0	42.8
Canterbury	60.9	48.3	33.8	15.7	37.3	48.2
Hurunui	48.5	39.2	15.4	12.1	22.4	31.2
Mackenzie	C	49.9	C	19.0	43.5	56.4
Timaru	C	55.8	C	12.1	27.8	49.0
West Coast	36.3	37.4	28.5	12.8	28.0	34.1
Wanaka	41.5	42.0	49.6	13.3	28.1	45.0
Queenstow n	69.6	37.4	C	C	53.6	C
Waitaki	31.9	49.5	28.0	6.8	20.8	38.4
Central Otago	C	45.0	C	3.8	12.0	33.3
Dunedin	66.6	68.0	34.1	20.9	51.9	60.0
Clutha	C	33.7	C	8.8	16.2	29.4
Fiordland	36.3	39.7	C	C	28.4	C
Southland	34.7	55.3	29.8	10.9	32.4	41.1
Total	63.4	51.9	35.3	12.5	37.5	51.2

(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	May 2018 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	13,795	17,474	2.53	65.86
Backpackers	5	8,928	C	C	C
Holiday parks	10	18,383	C	C	C
Total	53	43,958	24,595	2.54	30.96
Napier City					
Hotels	9	12,152	12,551	1.60	64.20
Motels	28	20,491	22,165	2.02	63.21
Backpackers	7	11,935	7,387	3.20	52.55
Holiday parks	5	16,554	7,014	4.00	19.84
Total	49	61,132	49,117	2.15	49.58
Wairoa and Central Hawke's Bay Districts					
Hotels	5	1,922	C	C	C
Motels	5	2,356	2,392	1.95	64.78
Backpackers	1	434	C	C	C
Holiday parks	6	10,850	C	C	C
Total	17	15,562	4,154	1.84	15.22
Hawke's Bay Regional Tourism Organisation area					
Hotels	19	16,926	15,556	1.67	57.54
Motels	66	36,642	42,030	2.20	64.31
Backpackers	13	21,297	9,090	3.55	35.80
Holiday parks	21	45,787	11,189	2.93	11.71
Total	119	120,652	77,866	2.24	38.37

(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