



# Commercial Accommodation Monitor:

## January 2019

Hawke's Bay

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# Preface

Commercial Accommodation Monitor: January 2019 – 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).

More data and commentary is available on the stats NZ website ([www.stats.govt.nz](http://www.stats.govt.nz)).

The February 2019 monitor will be released on 15 April 2019.

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 January 2019 compared with January 2018:

- Guest nights fell 0.2 percent to 169,860
- International guest nights fell 11.0 percent to 40,007
- Domestic guest nights rose 3.6 percent to 129,854
- The average length of stay fell from 2.54 nights to 2.46 nights
- The overall occupancy rate fell from 68.7 percent to 64.4 percent
- The occupancy rate, excluding holiday parks, was 73.1 percent in January 2019
- Accommodation capacity, excluding holiday parks, fell 3.9 percent.

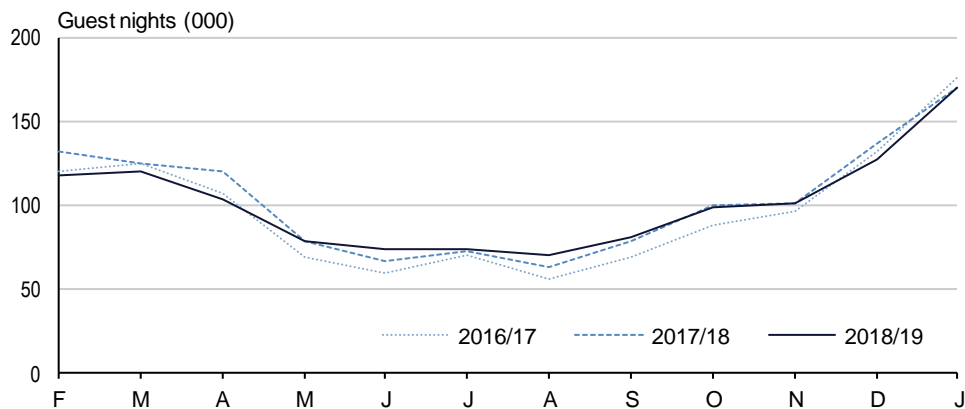
## Response rates for January 2019

The response rate for the Hawke's Bay RTO area was 80 percent for January 2019.

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

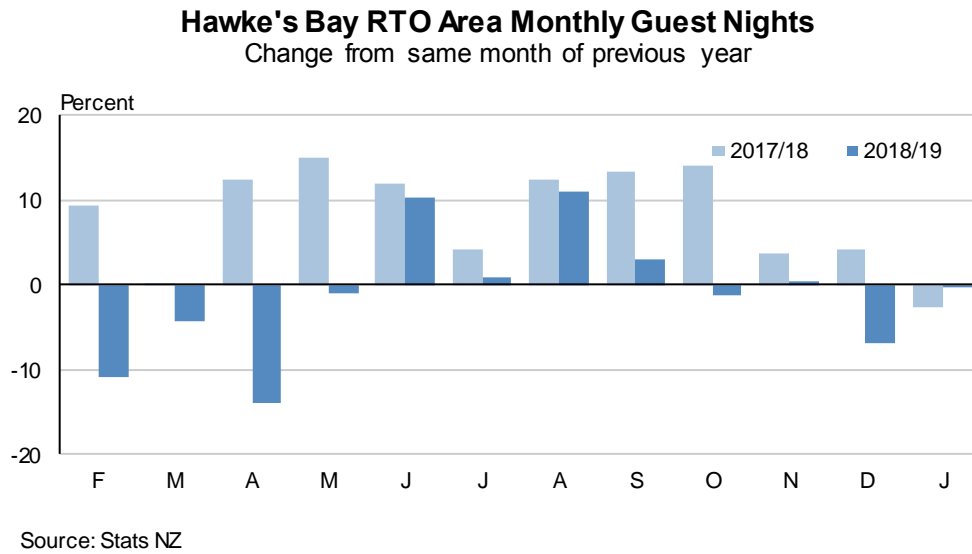
Figure 1.1

### Hawke's Bay RTO Area Monthly Guest Nights



Source: Stats NZ

Figure 1.2

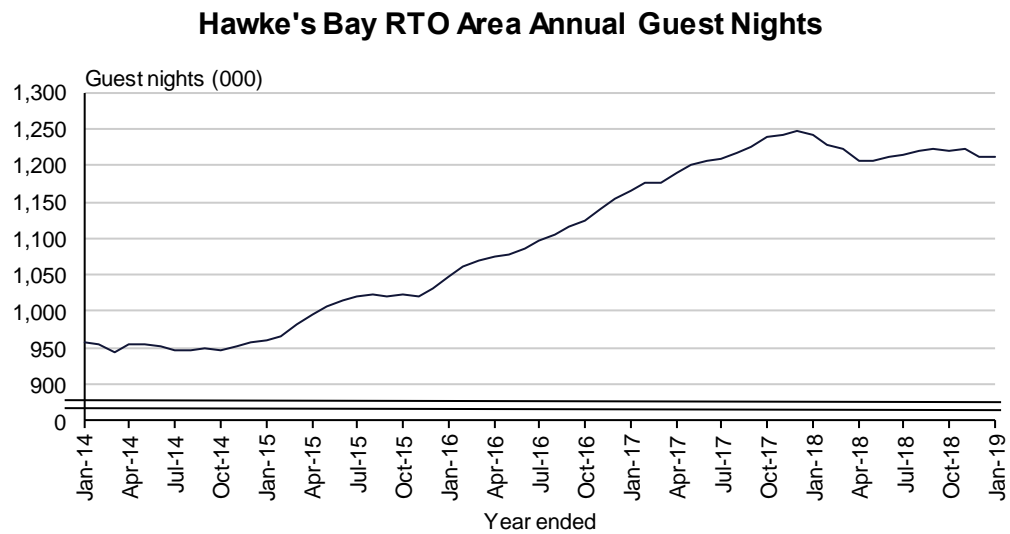


## Year ended highlights

For the year ended January 2019 compared with the previous year:

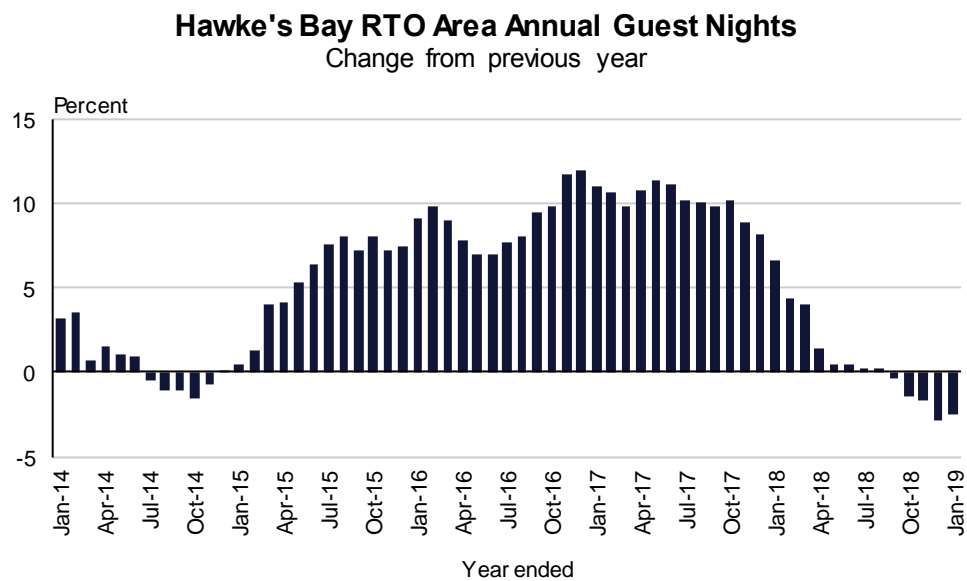
- Guest nights fell 2.5 percent to 1,211,455
- International guest nights fell 7.2 percent to 314,594
- Domestic guest nights fell 0.7 percent to 896,861
- The average length of stay fell from 2.29 nights to 2.28 nights
- The overall occupancy rate rose from 46.2 percent to 46.8 percent
- The occupancy rate, excluding holiday parks, was 61.6 percent for the year ended January 2019
- Accommodation capacity, excluding holiday parks, fell 6.8 percent.

Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

## 2 Accommodation variables

In January 2019, compared with January 2018, there was a decrease of 0.2 percent in total guest nights for the Hawke's Bay RTO area. Motels had the largest decrease, followed by backpackers. Holiday parks had the largest increase.

For the year ended January 2019, compared with the previous January year, total guest nights for the Hawke's Bay RTO area decreased 2.5 percent. Backpackers had the largest decrease, followed by motels. Hotels had the largest increase.

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<sup>(1)(2)</sup>*

Accommodation type	Monthly			Annual		
	January		Percentage change	Year ended		Percentage change
	2018	2019		January 2018	January 2019	
Guest nights						
Total guest nights	170,281	169,860	-0.2	1,242,523	1,211,455	-2.5
International	44,936	40,007	-11.0	338,996	314,594	-7.2
Domestic	125,345	129,854	3.6	903,527	896,861	-0.7
Hotels	22,998	24,277	5.6	203,800	220,262	8.1
Motels/apartments	66,315	63,174	-4.7	575,097	552,106	-4.0
Backpackers	17,388	14,447	-16.9	163,463	134,203	-17.9
Holiday parks	63,580	67,962	6.9	300,163	304,884	1.6
Occupancy rates <sup>(3)</sup> (%)						
Hotels	74.1	76.1	2.6	63.6	64.8	1.9
Motels/apartments	85.8	81.0	-5.6	67.7	68.4	1.1
Backpackers	64.8	57.4	-11.5	46.0	46.9	1.8
Holiday parks	53.8	51.0	-5.3	23.2	23.2	0.1
Total	68.7	64.4	-6.2	46.2	46.8	1.3
Total excluding holiday parks <sup>(4)</sup>	77.0	73.1	-5.0	60.0	61.6	2.7
Average length of stay <sup>(5)</sup>						
Hotels	1.78	1.80	1.3	1.58	1.72	8.5
Motels/apartments	2.18	2.01	-7.7	2.11	2.09	-0.9
Backpackers	3.18	4.57	44.0	4.10	3.77	-8.1
Holiday parks	3.49	3.25	-6.8	2.94	2.96	0.4
Total	2.54	2.46	-3.0	2.29	2.28	-0.3
Guest arrivals						
Hotels	12,913	13,453	4.2	128,943	128,391	-0.4
Motels/apartments	30,442	31,436	3.3	272,004	263,609	-3.1
Backpackers	5,473	3,158	-42.3	39,842	35,581	-10.7
Holiday parks	18,208	20,880	14.7	102,019	103,171	1.1
Total	67,035	68,927	2.8	542,808	530,752	-2.2
Establishments						
Hotels	19	18	-5.3	19	18	-5.3
Motels/apartments	67	64	-4.5	67	64	-4.5
Backpackers	14	13	-7.1	14	13	-7.1
Holiday parks	20	21	5.0	20	21	5.0
Total	120	116	-3.3	120	116	-3.3
Capacity <sup>(6)</sup>						
Hotels	16,926	16,895	-0.2	191,475	198,986	3.9
Motels/apartments	36,921	35,681	-3.4	444,563	427,103	-3.9
Backpackers	23,002	21,297	-7.4	295,280	242,123	-18.0
Holiday parks	42,935	47,647	11.0	557,841	545,557	-2.2
Total	119,784	121,520	1.4	1,489,159	1,413,769	-5.1

(1) Reclassifications, new businesses, ceased businesses, and temporary closures may affect figures.

(2) Irregular events, such as airshow s 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 w hen 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:**

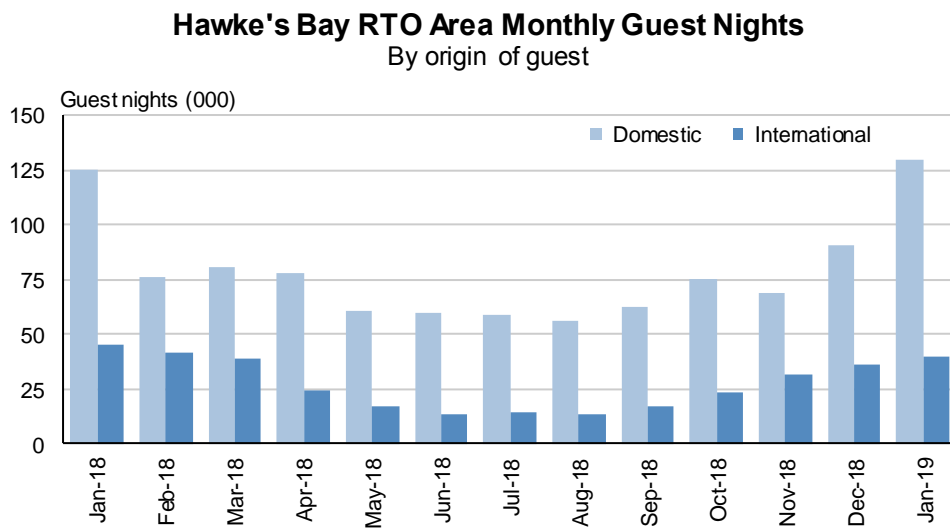
C confidential

### 3 Origin of guests

In January 2019, international guests accounted for 23.6 percent of all guest nights in the Hawke's Bay RTO area. When compared with January 2018, the number of international guest nights spent in the area in January 2019 was down 11.0 percent to 40,007. Domestic guest nights increased 3.6 percent, to 129,854, for the same period.

The proportion of the origin-of-guest estimate from actual data was 77 percent for January 2019.

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 <sup>(1)</sup> area			New Zealand		
		Origin of guest		Total	Origin of guest		Total
		Domestic	International		Domestic	International	
<b>Month</b>							
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
	Jun	60,126	13,586	73,712	1,443,331	824,407	2,267,738
	Jul	58,690	14,501	73,191	1,688,075	989,310	2,677,385
	Aug	55,856	13,838	69,694	1,571,502	952,679	2,524,181
	Sep	62,856	17,435	80,291	1,701,704	1,046,180	2,747,884
	Oct	74,882	23,685	98,567	1,954,146	1,314,205	3,268,352
	Nov	68,602	32,053	100,655	1,804,941	1,730,166	3,535,107
	Dec	90,833	36,574	127,406	2,289,702	1,908,866	4,198,568
2019	Jan	129,854	40,007	169,860	2,879,204	2,088,517	4,967,720
Percent change from the current month of the previous year							
		3.6	-11.0	-0.2	1.0	-1.4	0.0
<b>Year ended</b>							
January 2018		903,527	338,996	1,242,523	22,231,557	17,302,538	39,534,095
January 2019		896,861	314,594	1,211,455	22,805,700	17,559,881	40,365,581
Percent change from previous year							
		-0.7	-7.2	-2.5	2.6	1.5	2.1

(1) Regional tourism organisation

## 4 National results

In January 2019, a total of 4,968,000 guest nights were spent in short-term commercial accommodation in New Zealand, relatively unchanged (0.0 percent) from 4,969,000 nights in January 2018. The North Island recorded an increase (up 22,000 or 0.8 percent) while the South Island recorded a decrease (down 24,000 or 1.1 percent).

The accommodation types recorded mixed results in guest nights in January 2019, compared with January 2018. Backpackers had the largest decrease in guest nights (down 25,000 or 4.2 percent), followed by hotels (relatively unchanged down 2,000 or 0.1 percent). Holiday parks had the largest increase in guest nights (up 14,000 or 0.8 percent), followed by motels (up 11,000 or 0.9 percent).

For the year ended January 2019, there were 40,366,000 guest nights, an increase of 831,000 (2.1 percent) from the previous January year.

Refer to Table 4.1 for comparisons of data.

Table 4.1

### Hawke's Bay and New Zealand Guest Nights

*By accommodation type  
Monthly and year ended*

Accommodation type	Total guest nights			Percentage change	
	2017	2018	2019	2017 to 2018	2018 to 2019
<b>January month</b>					
<b>Hawke's Bay RTO area</b>					
Hotels	22,784	22,998	24,277	0.9	5.6
Motels	76,350	66,315	63,174	-13.1	-4.7
Backpackers	18,667	17,388	14,447	-6.9	-16.9
Holiday parks	57,363	63,580	67,962	10.8	6.9
Total	175,164	170,281	169,860	-2.8	-0.2
<b>New Zealand</b>					
Hotels	1,310,167	1,388,775	1,386,816	6.0	-0.1
Motels	1,368,206	1,321,337	1,332,732	-3.4	0.9
Backpackers	593,516	579,891	555,372	-2.3	-4.2
Holiday parks	1,627,566	1,679,117	1,692,800	3.2	0.8
Total	4,899,455	4,969,120	4,967,720	1.4	0.0
<b>Year ended January</b>					
<b>Hawke's Bay RTO area</b>					
Hotels	179,295	203,800	220,262	13.7	8.1
Motels	583,519	575,097	552,106	-1.4	-4.0
Backpackers	154,356	163,463	134,203	5.9	-17.9
Holiday parks	247,406	300,163	304,884	21.3	1.6
Total	1,164,576	1,242,523	1,211,455	6.7	-2.5
<b>New Zealand</b>					
Hotels	13,583,699	14,011,409	14,455,060	3.1	3.2
Motels	12,157,155	12,312,320	12,494,615	1.3	1.5
Backpackers	5,162,619	5,196,435	5,036,791	0.7	-3.1
Holiday parks	7,652,988	8,013,932	8,379,116	4.7	4.6
Total	38,556,462	39,534,095	40,365,581	2.5	2.1

## 5 Regional comparison

In January 2019, Rotorua recorded the largest decrease in guest nights (down 20,000 or 7.3 percent) from January 2018. This was followed by West Coast (down 13,000 or 7.0 percent), Dunedin (down 8,000 or 8.1 percent), Central Otago (down 8,000 or 10.6 percent), and Wanaka (down 7,000 or 4.8 percent).

Auckland recorded the largest increase (up 21,000 or 3.0 percent), followed by Coromandel (up 17,000 or 9.1 percent), Waikato (up 16,000 or 10.0 percent), Mackenzie (up 8,000 or 7.9 percent), and Queenstown (up 4,000 or 1.0 percent).

Table 5.1

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

RTO area	January guest nights								
	Domestic			International			Total		
	2018	2019	Percent age change	2018	2019	Percent age change	2018	2019	Percent age change
Northland	267,363	269,735	0.9	101,824	96,035	-5.7	369,187	365,770	-0.9
Auckland	355,679	356,626	0.3	352,664	373,060	5.8	708,344	729,686	3.0
Coromandel	145,100	166,121	14.5	44,167	40,349	-8.6	189,267	206,470	9.1
Waikato	109,401	126,199	15.4	46,787	45,656	-2.4	156,188	171,855	10.0
Bay of Plenty	140,258	132,045	-5.9	33,619	35,361	5.2	173,877	167,406	-3.7
Rotorua	141,896	139,839	-1.4	138,883	120,569	-13.2	280,780	260,408	-7.3
Taupo	91,002	91,420	0.5	61,721	56,300	-8.8	152,723	147,720	-3.3
Whakatane-									
Kawerau	55,549	53,718	-3.3	10,648	6,768	-36.4	66,196	60,485	-8.6
Gisborne	60,628	64,368	6.2	8,863	8,628	-2.7	69,491	72,995	5.0
Taranaki	75,701	77,548	2.4	16,800	15,851	-5.6	92,501	93,399	1.0
Hawke's Bay	125,345	129,854	3.6	44,936	40,007	-11.0	170,281	169,860	-0.2
Ruapehu	25,738	22,928	-10.9	24,956	26,237	5.1	50,694	49,165	-3.0
Manawatu	37,194	40,568	9.1	8,445	7,313	-13.4	45,639	47,881	4.9
Whanganui	17,397	18,850	8.4	5,313	4,442	-16.4	22,711	23,292	2.6
Wairarapa	26,958	29,696	10.2	7,320	6,035	-17.6	34,278	35,731	4.2
Kapiti-Horowhenua	32,788	34,351	4.8	5,783	6,396	10.6	38,571	40,748	5.6
Wellington	144,837	149,214	3.0	95,996	91,702	-4.5	240,834	240,917	0.0
Marlborough	54,262	56,816	4.7	47,036	45,998	-2.2	101,298	102,814	1.5
Nelson-Tasman	190,065	186,586	-1.8	88,022	86,344	-1.9	278,087	272,930	-1.9
Canterbury	218,176	218,468	0.1	216,075	218,984	1.3	434,250	437,452	0.7
Hurunui	34,678	34,338	-1.0	15,493	17,498	12.9	50,171	51,836	3.3
Mackenzie	31,582	34,645	9.7	69,148	74,064	7.1	100,730	108,709	7.9
Timaru	28,508	26,236	-8.0	12,478	12,112	-2.9	40,985	38,348	-6.4
West Coast	70,164	57,220	-18.4	119,188	118,964	-0.2	189,352	176,184	-7.0
Wanaka	69,987	63,605	-9.1	67,581	67,347	-0.3	137,568	130,951	-4.8
Queenstown	96,673	105,235	8.9	279,006	274,303	-1.7	375,679	379,538	1.0
Waitaki	39,182	36,496	-6.9	24,285	26,399	8.7	63,468	62,894	-0.9
Central Otago	58,683	53,568	-8.7	14,546	11,878	-18.3	73,229	65,446	-10.6
Dunedin	47,656	46,344	-2.8	49,687	43,142	-13.2	97,343	89,487	-8.1
Clutha	5,862	7,131	21.7	4,857	5,291	8.9	10,718	12,422	15.9
Fiordland	25,256	26,674	5.6	75,792	78,182	3.2	101,048	104,856	3.8
Southland	27,738	22,761	-17.9	25,894	27,301	5.4	53,632	50,062	-6.7
<b>Total</b>	<b>2,851,307</b>	<b>2,879,204</b>	<b>1.0</b>	<b>2,117,813</b>	<b>2,088,517</b>	<b>-1.4</b>	<b>4,969,120</b>	<b>4,967,720</b>	<b>0.0</b>

Table 5.2

**Regional Tourism Organisation Areas' Monthly Occupancy Rates<sup>(1)</sup>***By accommodation type*

RTO area	January 2019 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks <sup>(2)</sup>
	Percent					
Northland	68.0	73.7	58.0	44.9	53.6	67.3
Auckland	77.4	63.3	63.9	40.7	67.7	71.5
Coromandel	60.4	71.6	37.0	48.1	50.4	55.9
Waikato	56.6	66.2	63.5	41.1	54.7	62.9
Bay of Plenty	63.2	74.1	50.6	47.8	55.3	62.6
Rotorua	81.9	76.9	39.1	49.8	60.8	63.8
Taupo	72.8	75.0	60.7	35.0	57.9	69.2
Whakatane-Kawerau	C	72.8	C	C	42.4	C
Gisborne	C	77.0	C	32.1	42.1	65.6
Taranaki	46.7	56.5	38.1	55.9	52.1	49.5
Hawke's Bay	76.1	81.0	57.4	51.0	64.4	73.1
Ruapehu	56.8	36.5	24.9	52.2	37.9	35.1
Manawatu	35.1	49.9	C	C	38.9	C
Whanganui	C	53.9	65.1	C	43.5	C
Wairarapa	C	62.5	C	26.5	38.3	53.9
Kapiti-Horowhenua	C	59.1	C	30.7	33.9	38.4
Wellington	70.2	66.5	C	C	62.9	C
Marlborough	74.9	77.1	51.9	45.1	58.4	67.1
Nelson-Tasman	67.9	72.9	68.6	53.8	61.4	70.3
Canterbury	73.3	68.0	51.1	35.7	55.0	64.4
Hurunui	C	65.9	C	35.5	45.6	54.0
Mackenzie	C	74.9	C	67.5	75.2	79.1
Timaru	C	63.9	C	32.4	42.4	56.4
West Coast	59.2	67.1	50.9	45.8	55.0	58.7
Wanaka	71.9	89.3	72.7	59.4	67.5	76.6
Queenstown	84.4	77.7	74.0	56.0	76.4	79.6
Waitaki	47.4	66.1	47.0	11.3	20.0	54.7
Central Otago	C	83.0	C	28.8	38.1	66.6
Dunedin	57.9	64.6	43.1	51.8	56.1	57.2
Clutha	C	54.5	C	28.9	39.7	50.4
Fiordland	C	78.0	C	61.8	68.9	72.9
Southland	52.0	51.5	44.2	28.5	42.8	49.4
<b>Total</b>	71.6	68.3	54.9	41.4	56.7	65.5

(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<sup>(1)</sup>

Accommodation type	January 2019 results				
	Establish-ments	Capacity	Guest Nights	Average stay length	Occupancy rate
	Number			Days	Percent
Hastings District					
Hotels	5	2,914	C	C	C
Motels	33	13,857	26,395	2.48	78.57
Backpackers	5	8,928	C	C	C
Holiday parks	10	20,243	31,559	2.96	55.44
<b>Total</b>	53	45,942	69,055	2.80	65.75
Napier City					
Hotels	9	12,152	19,790	1.74	85.53
Motels	26	19,468	33,205	1.78	83.32
Backpackers	7	11,935	C	C	52.04
Holiday parks	5	16,554	C	C	58.37
<b>Total</b>	47	60,109	87,611	2.32	70.69
Wairoa and Central Hawke's Bay Districts					
Hotels	4	1,829	C	C	C
Motels	5	2,356	3,574	1.67	76.69
Backpackers	1	434	C	C	C
Holiday parks	6	10,850	C	C	31.50
<b>Total</b>	16	15,469	13,194	2.04	36.13
Hawke's Bay Regional Tourism Organisation area					
Hotels	18	16,895	24,277	1.80	76.08
Motels	64	35,681	63,174	2.01	81.04
Backpackers	13	21,297	14,447	4.57	57.35
Holiday parks	21	47,647	67,962	3.25	51.00
<b>Total</b>	116	121,520	169,860	2.46	64.42

(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 <https://www.stats.govt.nz/topics/accommodation>