



Commercial Accommodation Monitor: November 2018

Manawatu

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Preface

Commercial Accommodation Monitor: November 2018 – Manawatu presents comprehensive and impartial information on short-term commercial accommodation for the Manawatu 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:

- Manawatu District
- Palmerston North City
- Rangitikei District
- Tararua 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 2018 monitor will be released on 18 February 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

While all care and diligence has been used in processing, analysing and extracting data and information in this report, Stats NZ gives no warranty it is error free and will not be liable for any loss or damage suffered as a result of the use, directly or indirectly, of information in this report.

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1 Highlights

Monthly highlights

In November 2018 compared with November 2017:

- Guest nights rose 10.0 percent to 48,397
- International guest nights fell 17.4 percent to 6,673
- Domestic guest nights rose 16.2 percent to 41,724
- The average length of stay rose from 1.61 nights to 1.64 nights
- The overall occupancy rate rose from 40.3 percent to 43.8 percent
- Accommodation capacity, excluding holiday parks, fell 1.8 percent.

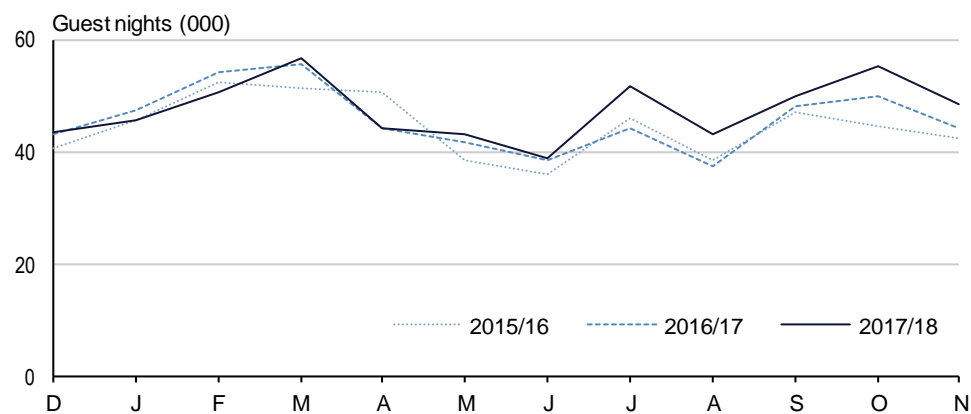
Response rates for November 2018

The response rate for the Manawatu RTO area was 88 percent for November 2018.

The proportion of the origin-of-guest estimate from unadjusted data was 76 percent.

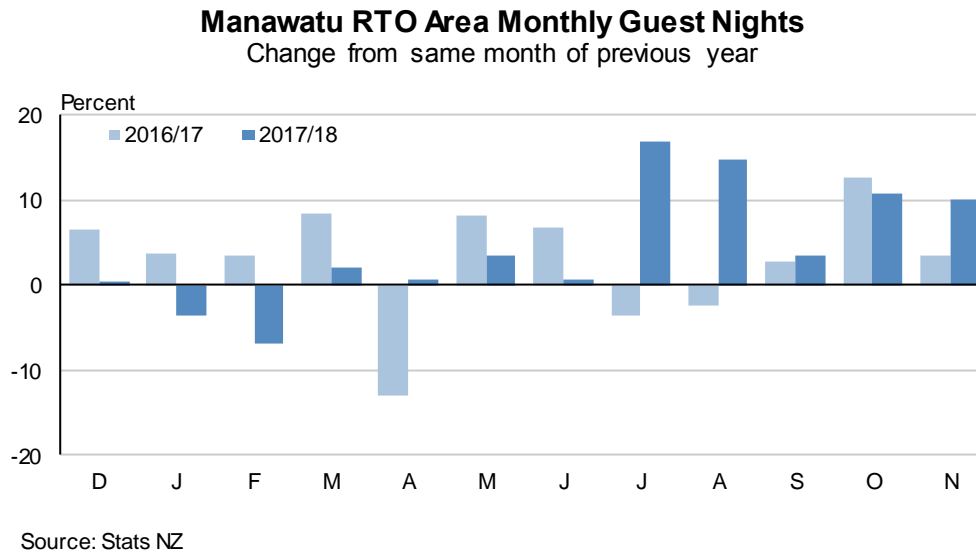
Figure 1.1

Manawatu RTO Area Monthly Guest Nights



Source: Stats NZ

Figure 1.2

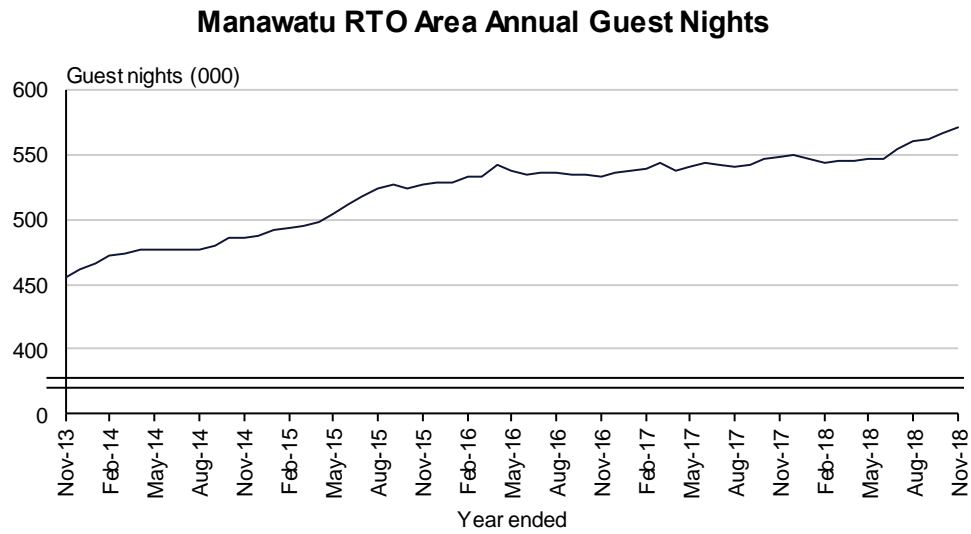


Year ended highlights

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

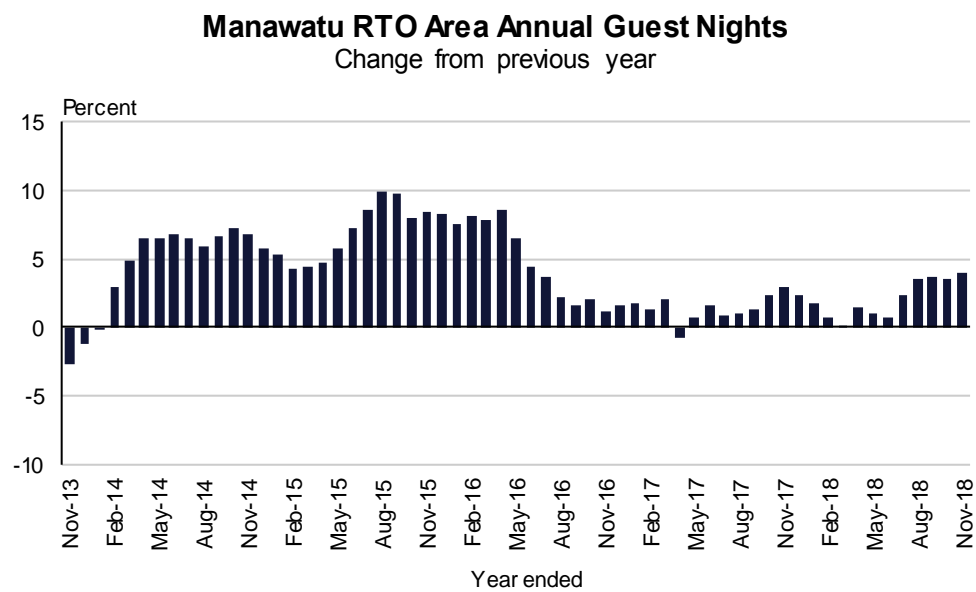
- Guest nights rose 4.0 percent to 570,765
- International guest nights rose 2.6 percent to 83,344
- Domestic guest nights rose 4.3 percent to 487,421
- The average length of stay rose from 1.65 nights to 1.70 nights
- The overall occupancy rate rose from 40.0 percent to 41.2 percent
- Accommodation capacity, excluding holiday parks, fell 0.8 percent.

Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

2 Accommodation variables

In November 2018, compared with November 2017, there was an increase of 10.0 percent in total guest nights for the Manawatu RTO area.

For the year ended November 2018, compared with the previous November year, total guest nights for the Manawatu RTO area increased 4.0 percent.

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

Table 2.1

Manawatu Accommodation Variables*By accommodation type
Monthly and year ended⁽¹⁾⁽²⁾*

Accommodation type	Monthly			Annual		
	November		Percentage change	Year ended		Percentage change
	2017	2018		November 2017	November 2018	
Guest nights						
Total guest nights	43,991	48,397	10.0	548,565	570,765	4.0
International	8,080	6,673	-17.4	81,264	83,344	2.6
Domestic	35,912	41,724	16.2	467,301	487,421	4.3
Hotels	9,860	9,551	-3.1	118,699	119,442	0.6
Motels/apartments	29,561	34,727	17.5	373,778	394,104	5.4
Backpackers	C	C	C	C	C	C
Holiday parks	C	C	C	C	C	C
Occupancy rates ⁽³⁾ (%)						
Hotels	45.2	46.2	2.2	43.6	44.0	0.8
Motels/apartments	55.8	64.0	14.8	53.6	57.6	7.4
Backpackers	C	C	C	C	C	C
Holiday parks	C	C	C	C	C	C
Total	40.3	43.8	8.5	40.0	41.2	3.1
Total excluding holiday parks ⁽⁴⁾	C	C	C	C	C	C
Average length of stay ⁽⁵⁾						
Hotels	1.44	1.43	-1.0	1.44	1.48	3.0
Motels/apartments	1.62	1.71	5.3	1.70	1.73	1.7
Backpackers	C	C	C	C	C	C
Holiday parks	C	C	C	C	C	C
Total	1.61	1.64	2.3	1.65	1.70	3.0
Guest arrivals						
Hotels	6,834	6,685	-2.2	82,597	80,659	-2.3
Motels/apartments	18,238	20,340	11.5	219,604	227,615	3.6
Backpackers	C	C	C	C	C	C
Holiday parks	C	C	C	C	C	C
Total	27,386	29,442	7.5	331,914	335,305	1.0
Establishments						
Hotels	15	14	-6.7	15	14	-6.7
Motels/apartments	63	62	-1.6	63	62	-1.6
Backpackers	3	3	0.0	3	3	0.0
Holiday parks	7	7	0.0	7	7	0.0
Total	88	86	-2.3	88	86	-2.3
Capacity ⁽⁶⁾						
Hotels	14,820	14,340	-3.2	180,549	178,793	-1.0
Motels/apartments	32,580	32,160	-1.3	397,331	393,981	-0.8
Backpackers	3,420	3,420	0.0	41,610	41,610	0.0
Holiday parks	17,670	17,640	-0.2	214,985	214,955	0.0
Total	68,490	67,560	-1.4	834,475	829,339	-0.6

(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:

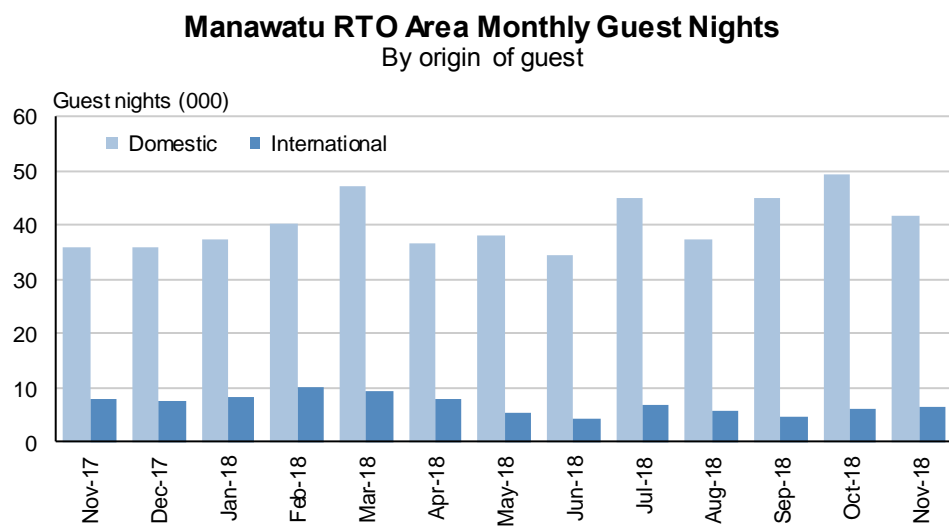
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3 Origin of guests

In November 2018, international guests accounted for 13.8 percent of all guest nights in the Manawatu RTO area. When compared with November 2017, the number of international guest nights spent in the area in November 2018 was down 17.4 percent to 6,673. Domestic guest nights increased 16.2 percent, to 41,724, for the same period.

The proportion of the origin-of-guest estimate from actual data was 76 percent for November 2018.

Figure 3.1



Source: Stats NZ

Table 3.1

Manawatu and New Zealand Monthly Guest Nights*By origin of guest*

		Manawatu RTO ⁽¹⁾ area			New Zealand		
		Origin of guest		Total	Origin of guest		Total
		Domestic	International		Domestic	International	
Month							
2017	Nov	35,912	8,080	43,991	1,732,137	1,673,546	3,405,683
	Dec	35,879	7,451	43,331	2,215,289	1,926,411	4,141,700
2018	Jan	37,194	8,445	45,639	2,851,307	2,117,813	4,969,120
	Feb	40,254	10,248	50,502	1,938,307	2,092,637	4,030,944
	Mar	47,135	9,490	56,625	2,180,388	1,996,067	4,176,455
	Apr	36,513	7,783	44,296	1,860,719	1,569,372	3,430,091
	May	37,923	5,299	43,222	1,493,682	1,047,474	2,541,156
	Jun	34,273	4,408	38,680	1,443,331	824,407	2,267,738
	Jul	44,955	6,815	51,769	1,688,075	989,310	2,677,385
	Aug	37,312	5,786	43,098	1,571,502	952,679	2,524,181
	Sep	45,035	4,821	49,856	1,701,704	1,046,180	2,747,884
	Oct	49,226	6,124	55,350	1,954,146	1,314,205	3,268,352
	Nov	41,724	6,673	48,397	1,804,941	1,730,166	3,535,107
Percent change from the current month of the previous year							
		16.2	-17.4	10.0	4.2	3.4	3.8
Year ended							
November 2017		467,301	81,264	548,565	22,179,367	17,126,694	39,306,061
November 2018		487,421	83,344	570,765	22,703,390	17,606,722	40,310,112
Percent change from previous year							
		4.3	2.6	4.0	2.4	2.8	2.6

(1) Regional tourism organisation

4 National results

In November 2018, a total of 3,535,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 129,000 nights (3.8 percent) from November 2017. Both the North Island (up 43,000 or 2.2 percent) and South Island (up 86,000 or 6.1 percent) recorded an increase.

All four accommodation types recorded an increase in guest nights in November 2018, compared with November 2017. Hotels had the largest increase in guest nights (up 58,000 or 4.6 percent), followed by holiday parks (up 42,000 or 7.2 percent), motels (up 29,000 or 2.7 percent), and backpackers (up 1,000 or 0.1 percent).

For the year ended November 2018, there were 40,310,000 guest nights, an increase of 1,004,000 (2.55 percent) from the previous November year.

Refer to Table 4.1 for comparisons of data.

Table 4.1

Manawatu and New Zealand Guest Nights
By accommodation type
Monthly and year ended

Accommodation type	Total guest nights			Percentage change	
	2016	2017	2018	2016 to 2017	2017 to 2018
November month					
Manawatu RTO area					
Hotels	9,205	9,860	9,551	7.1	-3.1
Motels	29,315	29,561	34,727	0.8	17.5
Backpackers	C	C	C	C	C
Holiday parks	C	C	C	C	C
Total	42,482	43,991	48,397	3.6	10.0
New Zealand					
Hotels	1,192,202	1,242,438	1,300,029	4.2	4.6
Motels	1,061,386	1,079,835	1,108,936	1.7	2.7
Backpackers	461,411	495,239	495,862	7.3	0.1
Holiday parks	550,113	588,171	630,280	6.9	7.2
Total	3,265,113	3,405,683	3,535,107	4.3	3.8
Year ended November					
Manawatu RTO area					
Hotels	109,723	118,699	119,442	8.2	0.6
Motels	367,925	373,778	394,104	1.6	5.4
Backpackers	C	C	C	C	C
Holiday parks	C	C	C	C	C
Total	533,230	548,565	570,765	2.9	4.0
New Zealand					
Hotels	13,578,684	13,866,631	14,417,527	2.1	4.0
Motels	12,073,813	12,349,572	12,464,385	2.3	0.9
Backpackers	5,155,700	5,205,231	5,084,955	1.0	-2.3
Holiday parks	7,561,239	7,884,627	8,343,245	4.3	5.8
Total	38,369,437	39,306,061	40,310,112	2.4	2.6

5 Regional comparison

In November 2018, Auckland recorded the largest increase in guest nights (up 36,000 or 5.4 percent) from November 2017. This was followed by Queenstown (up 31,000 or 10.4 percent), Canterbury (up 28,000 or 8.4 percent), Wanaka (up 10,000 or 13.8 percent), and Mackenzie (up 9,000 or 12.2 percent).

Nelson-Tasman recorded the largest decrease (down 7,000 or 5.5 percent), followed by Hurunui (down 4,000 or 12.9 percent), Bay of Plenty (down 3,000 or 3.6 percent), Waikato (down 3,000 or 2.5 percent), and Gisborne (down 3,000 or 8.7 percent).

Table 5.1

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

RTO area	November guest nights								
	Domestic			International			Total		
	2017	2018	Percent age change	2017	2018	Percent age change	2017	2018	Percent age change
Northland	81,031	89,919	11.0	69,715	64,612	-7.3	150,746	154,530	2.5
Auckland	328,045	358,680	9.3	331,848	336,928	1.5	659,894	695,608	5.4
Coromandel	45,716	43,872	-4.0	29,605	29,350	-0.9	75,320	73,223	-2.8
Waikato	87,262	88,309	1.2	39,447	35,173	-10.8	126,708	123,482	-2.5
Bay of Plenty	61,131	59,460	-2.7	33,242	31,518	-5.2	94,373	90,977	-3.6
Rotorua	91,344	96,691	5.9	113,282	107,681	-4.9	204,626	204,371	-0.1
Taupo	55,349	53,043	-4.2	40,432	40,220	-0.5	95,781	93,263	-2.6
Whakatane-Kawerau	14,215	15,137	6.5	5,592	5,920	5.9	19,808	21,057	6.3
Gisborne	22,933	21,822	-4.8	6,109	4,695	-23.1	29,042	26,517	-8.7
Taranaki	42,311	44,034	4.1	12,518	10,764	-14.0	54,829	54,798	-0.1
Hawke's Bay	66,045	68,602	3.9	34,327	32,053	-6.6	100,371	100,655	0.3
Ruapehu	18,141	21,234	17.0	18,235	19,259	5.6	36,376	40,492	11.3
Manawatu	35,912	41,724	16.2	8,080	6,673	-17.4	43,991	48,397	10.0
Whanganui	12,178	13,308	9.3	4,212	5,155	22.4	16,390	18,463	12.7
Wairarapa	14,122	18,637	32.0	4,322	3,267	-24.4	18,444	21,904	18.8
Kapiti-Horowhenua	16,461	18,854	14.5	3,546	4,450	25.5	20,007	23,304	16.5
Wellington	152,085	157,566	3.6	89,803	83,130	-7.4	241,888	240,695	-0.5
Marlborough	33,942	35,472	4.5	32,199	29,538	-8.3	66,141	65,011	-1.7
Nelson-Tasman	60,568	60,025	-0.9	60,736	54,653	-10.0	121,303	114,678	-5.5
Canterbury	171,966	163,553	-4.9	157,386	193,434	22.9	329,353	356,986	8.4
Hurunui	20,064	16,934	-15.6	11,482	10,553	-8.1	31,546	27,488	-12.9
Mackenzie	18,723	18,008	-3.8	54,416	64,074	17.7	73,139	82,082	12.2
Timaru	17,830	17,889	0.3	8,145	8,784	7.8	25,976	26,673	2.7
West Coast	39,445	37,595	-4.7	97,331	102,538	5.3	136,776	140,133	2.5
Wanaka	23,382	24,045	2.8	47,078	56,136	19.2	70,460	80,181	13.8
Queenstown	80,258	96,305	20.0	221,621	236,851	6.9	301,879	333,156	10.4
Waitaki	17,547	17,534	-0.1	17,192	20,331	18.3	34,740	37,866	9.0
Central Otago	15,598	16,811	7.8	5,374	7,187	33.7	20,972	23,998	14.4
Dunedin	42,267	47,152	11.6	39,122	37,021	-5.4	81,389	84,173	3.4
Clutha	3,918	4,308	10.0	2,596	3,424	31.9	6,514	7,733	18.7
Fiordland	17,845	15,747	-11.8	59,084	66,798	13.1	76,929	82,545	7.3
Southland	24,505	22,670	-7.5	15,468	17,995	16.3	39,973	40,665	1.7
Total	1,732,137	1,804,941	4.2	1,673,546	1,730,166	3.4	3,405,683	3,535,107	3.8

Table 5.2

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

RTO area	November 2018 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks ⁽²⁾
	Percent					
Northland	53.9	63.4	44.8	15.9	31.1	55.0
Auckland	88.6	74.6	70.9	22.2	74.5	81.6
Coromandel	51.9	51.2	32.0	18.0	25.6	43.3
Waikato	71.6	71.8	43.7	18.6	47.6	64.7
Bay of Plenty	58.5	62.1	52.1	21.9	39.5	57.4
Rotorua	84.1	74.2	36.4	28.9	55.8	63.1
Taupo	63.0	61.1	48.4	21.5	45.5	56.6
Whakatane-Kawerau	C	61.5	C	10.0	20.6	55.6
Gisborne	C	64.8	C	7.8	24.0	59.1
Taranaki	58.2	62.0	37.2	18.0	40.7	55.7
Hawke's Bay	73.6	73.8	63.9	20.6	50.8	71.2
Ruapehu	52.2	39.7	23.3	36.1	34.4	34.1
Manawatu	46.2	64.0	C	C	43.8	C
Whanganui	C	59.4	59.3	C	39.1	C
Wairarapa	C	59.4	C	14.3	30.7	53.3
Kapiti-Horowhenua	C	67.0	C	17.6	24.3	31.8
Wellington	85.4	78.7	C	C	72.9	C
Marlborough	60.1	69.7	40.7	24.3	44.0	56.9
Nelson-Tasman	60.7	64.4	53.5	14.4	34.9	59.0
Canterbury	77.5	72.2	44.5	23.8	51.5	65.0
Hurunui	C	49.0	C	18.9	29.8	39.2
Mackenzie	C	62.1	C	41.5	63.2	74.3
Timaru	C	66.9	C	20.8	36.8	58.9
West Coast	58.1	66.7	41.7	31.0	48.2	55.2
Wanaka	73.0	81.4	76.6	25.9	49.6	76.6
Queenstown	86.3	71.6	76.5	43.3	75.2	80.2
Waitaki	52.4	70.3	35.4	5.6	16.0	57.4
Central Otago	25.0	67.3	22.7	6.9	15.5	41.8
Dunedin	73.7	75.9	42.5	35.8	61.0	67.6
Clutha	C	52.8	C	21.1	29.1	36.7
Fiordland	74.3	75.8	56.0	47.6	60.0	67.1
Southland	44.5	58.4	39.2	20.9	39.9	48.4
Total	77.0	68.1	51.0	19.7	49.3	66.2

(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 Manawatu RTO area.

Table 6.1

Local Authority and Manawatu Accommodation Results⁽¹⁾

Accommodation type	November 2018 results				
	Establish-ments	Capacity	Guest Nights	Average stay length	Occupancy rate
	Number			Days	Percent
Manawatu District and Palmerston North City					
Hotels	8	12,240	C	C	C
Motels	49	26,670	29,562	1.77	65.66
Backpackers	1	1,050	C	C	C
Holiday parks	4	12,840	C	C	9.09
Total	62	52,800	40,810	1.67	47.47
Rangitikei and Tararua Districts					
Hotels	6	2,100	C	C	C
Motels	13	5,490	5,165	1.44	56.19
Backpackers	2	2,370	C	C	C
Holiday parks	3	4,800	C	C	C
Total	24	14,760	7,588	1.52	30.65
Manawatu Regional Tourism Organisation area					
Hotels	14	14,340	9,551	1.43	46.18
Motels	62	32,160	34,727	1.71	64.05
Backpackers	3	3,420	C	C	C
Holiday parks	7	17,640	C	C	C
Total	86	67,560	48,397	1.64	43.79

(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