



Commercial Accommodation Monitor:

February 2019

Hawke's Bay

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Preface

Commercial Accommodation Monitor: February 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).

The March 2019 monitor will be released on 14 May 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 February 2019 compared with February 2018:

- Guest nights fell 0.7 percent to 116,607
- International guest nights fell 13.6 percent to 36,040
- Domestic guest nights rose 6.3 percent to 80,567
- The average length of stay rose from 2.26 nights to 2.32 nights
- The overall occupancy rate fell from 58.9 percent to 58.6 percent
- The occupancy rate, excluding holiday parks, was 73.4 percent in February 2019
- Accommodation capacity, excluding holiday parks, fell 4.5 percent.

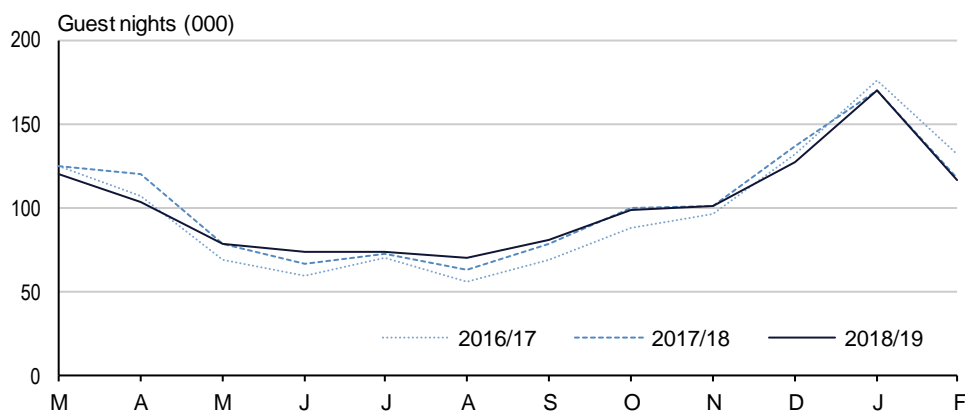
Response rates for February 2019

The response rate for the Hawke's Bay RTO area was 84 percent for February 2019.

The proportion of the origin-of-guest estimate from unadjusted data was 81 percent.

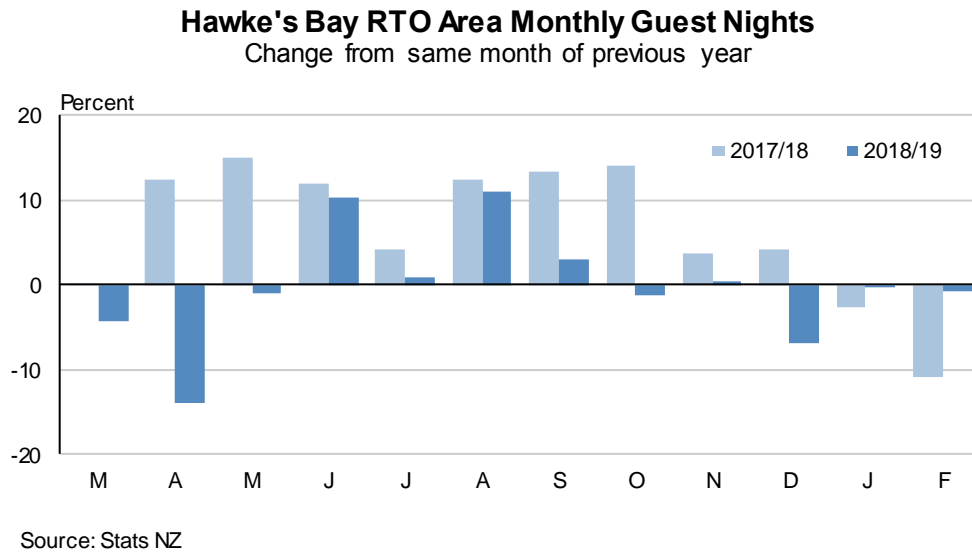
Figure 1.1

Hawke's Bay RTO Area Monthly Guest Nights



Source: Stats NZ

Figure 1.2

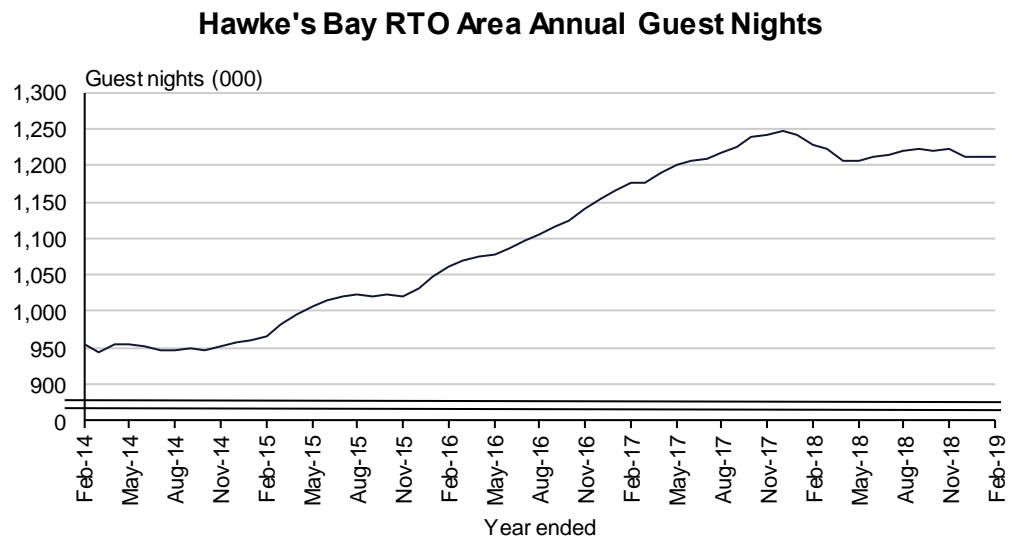


Year ended highlights

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

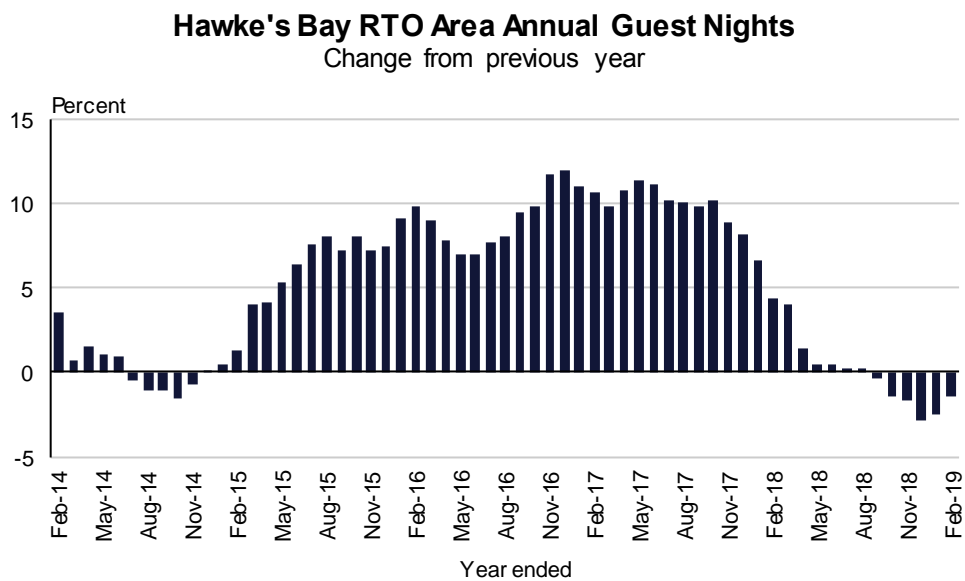
- Guest nights fell 1.4 percent to 1,210,607
- International guest nights fell 8.6 percent to 308,942
- Domestic guest nights rose 1.3 percent to 901,665
- The average length of stay remained at 2.29 nights
- The overall occupancy rate rose from 46.0 percent to 46.7 percent
- The occupancy rate, excluding holiday parks, was 61.4 percent for the year ended February 2019
- Accommodation capacity, excluding holiday parks, fell 6.7 percent.

Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

2 Accommodation variables

In February 2019, compared with February 2018, there was a decrease of 0.7 percent in total guest nights for the Hawke's Bay RTO area. Backpackers had the largest decrease, followed by motels. Holiday parks had the only increase.

For the year ended February 2019, compared with the previous February year, total guest nights for the Hawke's Bay RTO area decreased 1.4 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⁽¹⁾⁽²⁾*

Accommodation type	Monthly			Annual		
	February		Percentage change	Year ended		Percentage change
	2018	2019		February 2018	February 2019	
Guest nights						
Total guest nights	117,455	116,607	-0.7	1,228,230	1,210,607	-1.4
International	41,693	36,040	-13.6	338,156	308,942	-8.6
Domestic	75,762	80,567	6.3	890,074	901,665	1.3
Hotels	20,574	19,462	-5.4	204,424	219,151	7.2
Motels/apartments	49,986	48,525	-2.9	562,921	550,645	-2.2
Backpackers	16,085	14,445	-10.2	161,244	132,563	-17.8
Holiday parks	30,810	34,174	10.9	299,642	308,248	2.9
Occupancy rates ⁽³⁾ (%)						
Hotels	76.9	79.9	3.8	63.4	65.0	2.5
Motels/apartments	79.3	78.1	-1.5	67.1	68.3	1.8
Backpackers	66.2	60.6	-8.4	46.0	46.3	0.7
Holiday parks	32.7	35.9	9.8	23.0	23.5	2.1
Total	58.9	58.6	-0.4	46.0	46.7	1.6
Total excluding holiday parks ⁽⁴⁾	74.9	73.4	-1.9	59.7	61.4	2.9
Average length of stay ⁽⁵⁾						
Hotels	1.78	1.77	-0.4	1.61	1.71	6.7
Motels/apartments	2.11	2.10	-0.2	2.10	2.09	-0.3
Backpackers	3.49	6.83	95.9	3.95	4.01	1.4
Holiday parks	2.53	2.42	-4.6	2.98	2.93	-1.8
Total	2.26	2.32	2.7	2.29	2.29	-0.1
Guest arrivals						
Hotels	11,571	10,989	-5.0	127,204	127,809	0.5
Motels/apartments	23,742	23,092	-2.7	267,982	262,960	-1.9
Backpackers	4,615	2,115	-54.2	40,814	33,081	-18.9
Holiday parks	12,159	14,129	16.2	100,401	105,141	4.7
Total	52,086	50,326	-3.4	536,401	528,992	-1.4
Establishments						
Hotels	19	17	-10.5	19	17	-10.5
Motels/apartments	66	64	-3.0	66	64	-3.0
Backpackers	14	13	-7.1	14	13	-7.1
Holiday parks	21	21	0.0	21	21	0.0
Total	120	115	-4.2	120	115	-4.2
Capacity ⁽⁶⁾						
Hotels	15,288	14,504	-5.1	192,791	198,202	2.8
Motels/apartments	33,096	32,256	-2.5	442,043	426,263	-3.6
Backpackers	20,776	19,292	-7.1	292,060	240,639	-17.6
Holiday parks	42,336	43,036	1.7	552,269	546,257	-1.1
Total	111,496	109,088	-2.2	1,479,163	1,411,361	-4.6

(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:

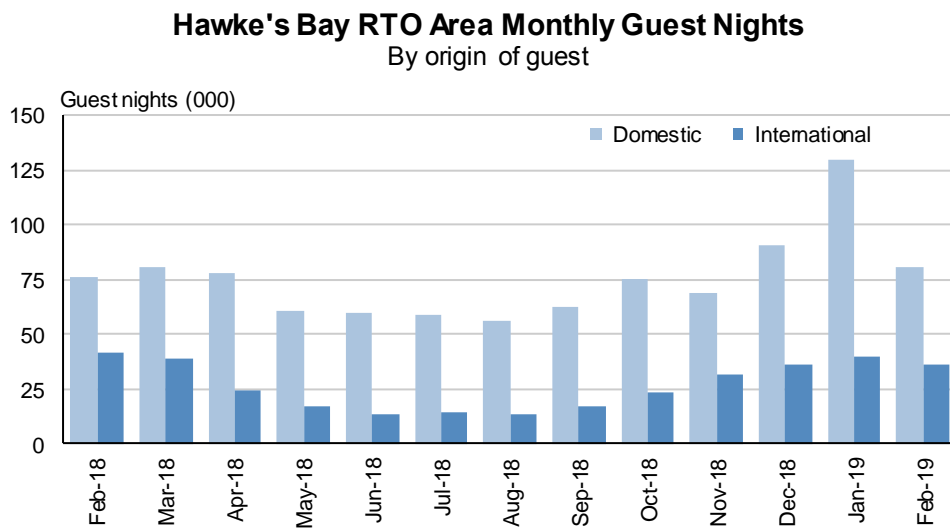
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3 Origin of guests

In February 2019, international guests accounted for 30.9 percent of all guest nights in the Hawke's Bay RTO area. When compared with February 2018, the number of international guest nights spent in the area in February 2019 was down 13.6 percent to 36,040. Domestic guest nights increased 6.3 percent, to 80,567, for the same period.

The proportion of the origin-of-guest estimate from actual data was 81 percent for February 2019.

Figure 3.1



Source: Stats NZ

Table 3.1

Hawke's Bay and New Zealand Monthly Guest Nights*By origin of guest*

		Haw ke's Bay RTO ⁽¹⁾ area			New Zealand		
		Origin of guest		Total	Origin of guest		Total
		Domestic	International		Domestic	International	
Month							
2018	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
Feb		80,567	36,040	116,607	1,988,788	2,026,586	4,015,374
Percent change from the current month of the previous year							
		6.3	-13.6	-0.7	2.6	-3.2	-0.4
Year ended							
February 2018		890,074	338,156	1,228,230	22,184,057	17,431,855	39,615,912
February 2019		901,665	308,942	1,210,607	22,856,181	17,493,830	40,350,011
Percent change from previous year							
		1.3	-8.6	-1.4	3.0	0.4	1.9

(1) Regional tourism organisation

4 National results

In February 2019, a total of 4,015,000 guest nights were spent in short-term commercial accommodation in New Zealand, a decrease of 16,000 nights (0.4 percent) from February 2018. North Island guest nights were unchanged (up 1,000 or 0.0 percent) while the South Island recorded a decrease (down 17,000 or 0.9 percent).

Two of the four accommodation types recorded a decrease in guest nights in February 2019, compared with February 2018.

Backpackers had the largest decrease in guest nights (down 25,000 or 4.6 percent), followed by motels (down 20,000 or 1.6 percent). Holiday parks had the largest increase in guest nights (up 18,000 or 1.9 percent), followed by hotels (up 12,000 or 0.9 percent).

For the year ended February 2019, there were 40,350,000 guest nights, an increase of 734,000 (1.85 percent) from the previous February 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	
	2017	2018	2019	2017 to 2018	2018 to 2019
February month					
Hawke's Bay RTO area					
Hotels	19,950	20,574	19,462	3.1	-5.4
Motels	62,162	49,986	48,525	-19.6	-2.9
Backpackers	18,304	16,085	14,445	-12.1	-10.2
Holiday parks	31,332	30,810	34,174	-1.7	10.9
Total	131,747	117,455	116,607	-10.8	-0.7
New Zealand					
Hotels	1,256,915	1,327,592	1,339,812	5.6	0.9
Motels	1,220,328	1,235,928	1,215,591	1.3	-1.6
Backpackers	550,634	540,872	515,807	-1.8	-4.6
Holiday parks	921,250	926,552	944,164	0.6	1.9
Total	3,949,127	4,030,944	4,015,374	2.1	-0.4
Year ended February					
Hawke's Bay RTO area					
Hotels	182,487	204,424	219,151	12.0	7.2
Motels	587,120	562,921	550,645	-4.1	-2.2
Backpackers	153,508	161,244	132,563	5.0	-17.8
Holiday parks	252,752	299,642	308,248	18.6	2.9
Total	1,175,866	1,228,230	1,210,607	4.5	-1.4
New Zealand					
Hotels	13,573,064	14,082,085	14,467,280	3.8	2.7
Motels	12,129,668	12,327,920	12,474,278	1.6	1.2
Backpackers	5,161,818	5,186,673	5,011,726	0.5	-3.4
Holiday parks	7,675,525	8,019,234	8,396,727	4.5	4.7
Total	38,540,076	39,615,912	40,350,011	2.8	1.9

5 Regional comparison

In February 2019, Rotorua recorded the largest decrease in guest nights (down 15,000 or 6.7 percent) from February 2018. This was followed by Taupo (down 10,000 or 8.8 percent), Dunedin (down 9,000 or 8.8 percent), Northland (down 6,000 or 2.9 percent), and Wanaka (down 6,000 or 5.7 percent).

Nelson-Tasman recorded the largest increase (up 8,000 or 4.4 percent), followed by Mackenzie (up 6,000 or 6.5 percent), Gisborne (up 5,000 or 14.9 percent), Wellington (up 5,000 or 1.9 percent), and Coromandel (up 5,000 or 4.4 percent).

Table 5.1

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

RTO area	February guest nights								
	Domestic			International			Total		
	2018	2019	Percent age change	2018	2019	Percent age change	2018	2019	Percent age change
Northland	121,948	124,075	1.7	90,776	82,429	-9.2	212,723	206,504	-2.9
Auckland	320,600	309,682	-3.4	345,353	357,405	3.5	665,953	667,086	0.2
Coromandel	61,727	69,261	12.2	41,688	38,684	-7.2	103,415	107,945	4.4
Waikato	89,352	98,420	10.1	44,912	37,854	-15.7	134,265	136,274	1.5
Bay of Plenty	76,095	76,313	0.3	31,131	31,089	-0.1	107,226	107,402	0.2
Rotorua	94,600	98,052	3.6	130,724	112,171	-14.2	225,324	210,223	-6.7
Taupo	63,823	53,375	-16.4	52,150	52,428	0.5	115,973	105,803	-8.8
Whakatane-Kawerau	16,100	21,615	34.3	7,863	6,616	-15.9	23,962	28,231	17.8
Gisborne	25,287	29,840	18.0	7,103	7,386	4.0	32,390	37,227	14.9
Taranaki	45,179	50,770	12.4	13,932	12,639	-9.3	59,112	63,408	7.3
Hawke's Bay	75,762	80,567	6.3	41,693	36,040	-13.6	117,455	116,607	-0.7
Ruapehu	23,359	21,499	-8.0	21,251	20,698	-2.6	44,610	42,197	-5.4
Manawatu	40,254	44,309	10.1	10,248	7,864	-23.3	50,502	52,173	3.3
Whanganui	12,883	17,047	32.3	5,510	5,226	-5.2	18,393	22,273	21.1
Wairarapa	20,317	21,691	6.8	6,543	5,647	-13.7	26,860	27,338	1.8
Kapiti-Horowhenua	21,826	24,913	14.1	5,653	6,449	14.1	27,479	31,362	14.1
Wellington	140,795	149,459	6.2	103,229	99,228	-3.9	244,024	248,687	1.9
Marlborough	48,866	45,483	-6.9	46,679	46,124	-1.2	95,544	91,606	-4.1
Nelson-Tasman	88,583	101,960	15.1	89,903	84,370	-6.2	178,487	186,330	4.4
Canterbury	183,376	181,479	-1.0	227,915	232,103	1.8	411,291	413,582	0.6
Hurunui	22,075	21,822	-1.1	16,225	13,696	-15.6	38,300	35,518	-7.3
Mackenzie	19,831	21,395	7.9	64,438	68,377	6.1	84,269	89,772	6.5
Timaru	17,873	16,326	-8.7	15,126	13,452	-11.1	32,999	29,778	-9.8
West Coast	50,823	52,125	2.6	123,326	119,031	-3.5	174,150	171,156	-1.7
Wanaka	31,045	30,767	-0.9	73,418	67,740	-7.7	104,464	98,507	-5.7
Queenstown	79,556	77,242	-2.9	266,939	265,909	-0.4	346,495	343,150	-1.0
Waitaki	22,784	23,833	4.6	30,625	28,404	-7.3	53,409	52,237	-2.2
Central Otago	21,538	23,142	7.4	11,902	9,236	-22.4	33,440	32,378	-3.2
Dunedin	47,791	46,851	-2.0	56,182	47,952	-14.6	103,973	94,803	-8.8
Clutha	5,516	6,448	16.9	5,996	6,154	2.6	11,512	12,602	9.5
Fiordland	21,107	21,208	0.5	74,874	75,157	0.4	95,981	96,365	0.4
Southland	27,635	27,823	0.7	29,330	29,030	-1.0	56,965	56,853	-0.2
Total	1,938,307	1,988,788	2.6	2,092,637	2,026,586	-3.2	4,030,944	4,015,374	-0.4

Table 5.2

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

RTO area	February 2019 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks ⁽²⁾
	Percent					
Northland	69.9	73.5	43.5	25.5	40.3	63.4
Auckland	85.8	72.9	65.6	28.1	72.6	78.5
Coromandel	56.8	67.2	30.9	29.6	35.9	50.9
Waikato	72.0	70.3	51.2	27.8	52.3	66.1
Bay of Plenty	78.2	68.2	48.9	31.4	47.1	62.5
Rotorua	85.4	79.3	37.9	38.8	59.6	65.2
Taupo	70.8	73.4	52.6	25.6	52.1	65.1
Whakatane-Kawerau	C	77.5	C	15.9	28.8	68.1
Gisborne	C	72.4	C	14.6	29.5	63.8
Taranaki	55.3	65.8	35.7	33.6	47.2	56.2
Hawke's Bay	79.9	78.1	60.6	35.9	58.6	73.4
Ruapehu	61.8	38.8	25.2	43.8	38.1	36.9
Manawatu	50.0	67.7	C	C	47.4	C
Whanganui	C	71.5	67.1	C	47.5	C
Wairarapa	C	69.2	C	23.0	38.4	58.6
Kapiti-Horowhenua	C	73.9	C	20.1	29.5	40.0
Wellington	84.1	79.9	C	C	75.6	C
Marlborough	82.2	83.0	58.8	47.0	63.1	73.6
Nelson-Tasman	80.3	84.1	69.6	37.0	55.6	77.1
Canterbury	84.0	81.4	56.9	30.5	59.5	74.4
Hurunui	59.9	62.7	28.9	27.1	39.2	49.3
Mackenzie	C	75.6	C	61.1	74.4	81.1
Timaru	C	74.6	C	27.1	43.7	66.8
West Coast	71.9	79.3	54.1	48.3	62.6	68.3
Wanaka	76.2	91.7	87.5	46.9	64.7	84.7
Queenstown	91.1	77.8	79.7	55.7	80.8	84.7
Waitaki	58.9	77.4	57.3	10.4	21.6	65.9
Central Otago	59.3	82.3	27.1	10.8	22.7	57.4
Dunedin	82.6	84.7	50.6	55.0	71.9	76.3
Clutha	C	62.2	C	30.1	45.4	60.0
Fiordland	87.4	82.2	71.3	70.3	76.1	79.5
Southland	62.5	66.9	51.4	35.1	52.8	60.8
Total	80.7	75.0	56.2	30.5	56.6	71.4

(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	February 2019 results				
	Establish-ments	Capacity	Guest Nights	Average stay length	Occupancy rate
	Number			Days	Percent
Hastings District					
Hotels	4	1,876	C	C	C
Motels	33	12,516	19,995	2.26	77.87
Backpackers	5	8,120	C	C	C
Holiday parks	10	18,284	13,002	2.06	32.54
Total	52	40,796	41,386	2.46	52.56
Napier City					
Hotels	9	10,976	16,457	1.70	89.32
Motels	26	17,612	25,486	2.05	77.65
Backpackers	7	10,780	8,281	5.83	67.60
Holiday parks	5	14,952	16,711	3.20	50.17
Total	47	54,320	66,934	2.33	70.45
Wairoa and Central Hawke's Bay Districts					
Hotels	4	1,652	C	C	C
Motels	5	2,128	3,044	1.71	83.63
Backpackers	1	392	C	C	C
Holiday parks	6	9,800	4,461	1.72	20.42
Total	16	13,972	8,286	1.74	30.25
Hawke's Bay Regional Tourism Organisation area					
Hotels	17	14,504	19,462	1.77	79.89
Motels	64	32,256	48,525	2.10	78.13
Backpackers	13	19,292	14,445	6.83	60.63
Holiday parks	21	43,036	34,174	2.42	35.90
Total	115	109,088	116,607	2.32	58.61

(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>