



# Commercial Accommodation Monitor: December 2018

Hawke's Bay

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## Preface

Commercial Accommodation Monitor: December 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).

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

The January 2019 monitor will be released on 14 March 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 December 2018 compared with December 2017:

- Guest nights fell 6.9 percent to 127,406
- International guest nights fell 11.7 percent to 36,574
- Domestic guest nights fell 4.9 percent to 90,833
- The average length of stay rose from 2.32 nights to 2.33 nights
- The overall occupancy rate fell from 55.8 percent to 53.7 percent
- The occupancy rate, excluding holiday parks, was 66.2 percent in December 2018
- Accommodation capacity, excluding holiday parks, fell 3.9 percent.

## Response rates for December 2018

The response rate for the Hawke's Bay RTO area was 82 percent for December 2018.

The proportion of the origin-of-guest estimate from unadjusted data was 80 percent.

Figure 1.1

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

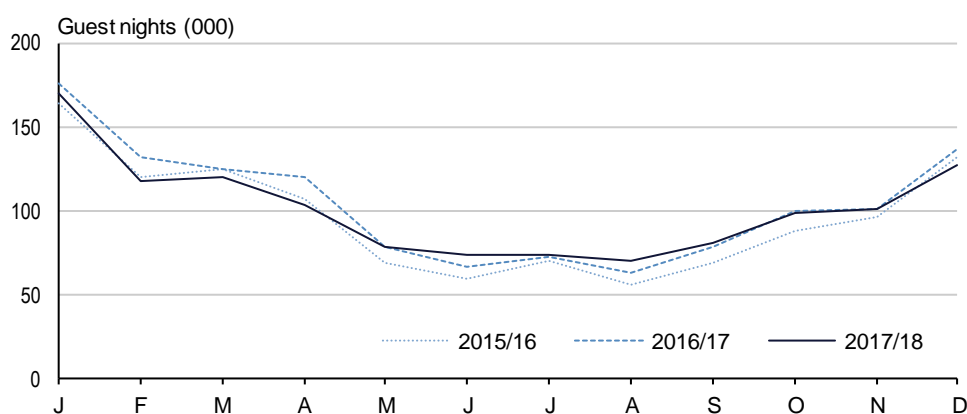
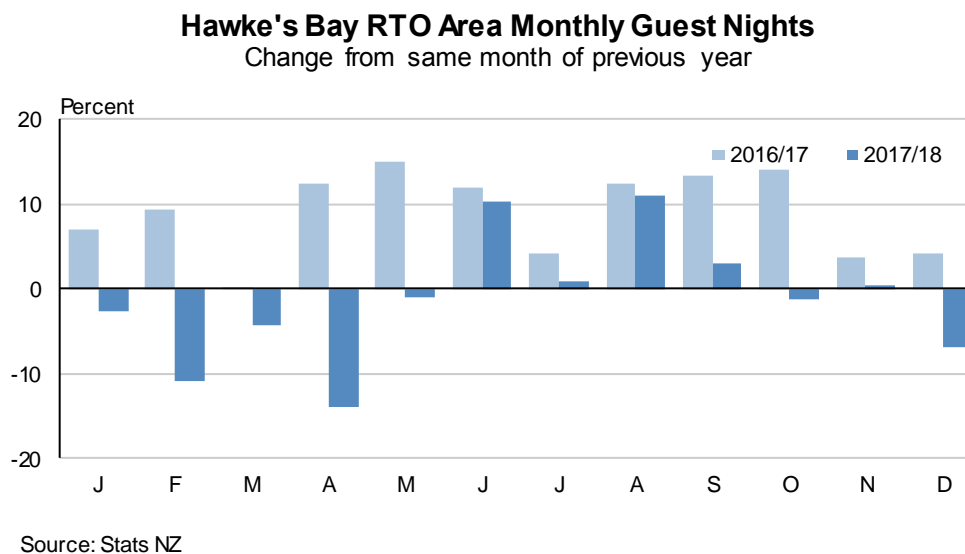


Figure 1.2

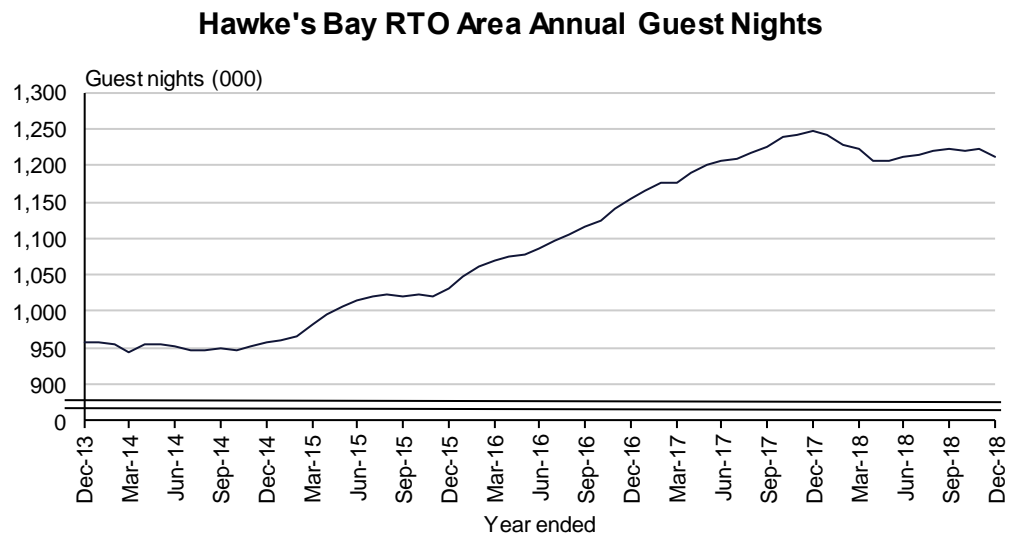


## Year ended highlights

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

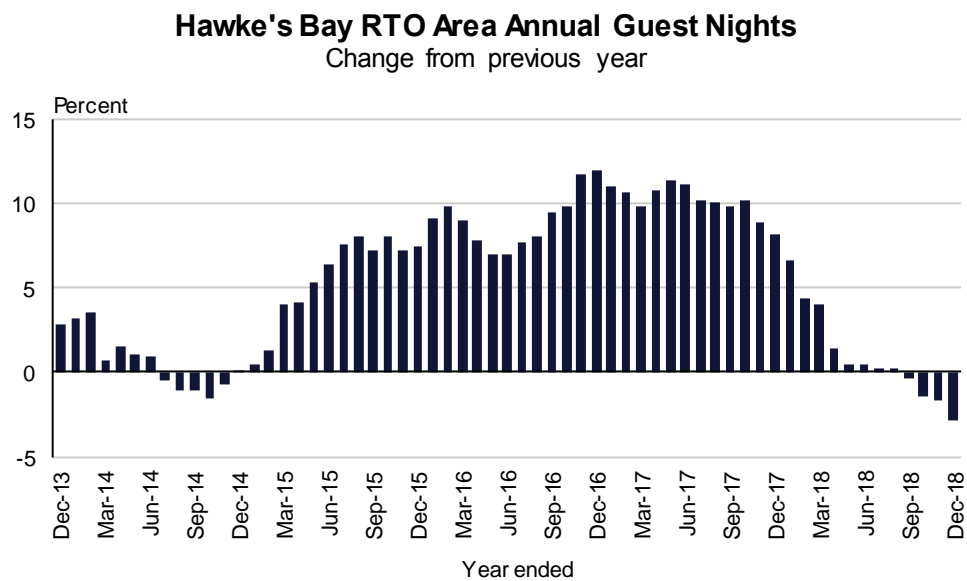
- Guest nights fell 2.8 percent to 1,211,876
- International guest nights fell 6.7 percent to 319,524
- Domestic guest nights fell 1.4 percent to 892,352
- The average length of stay rose from 2.28 nights to 2.29 nights
- The overall occupancy rate rose from 46.5 percent to 47.1 percent
- The occupancy rate, excluding holiday parks, was 62.0 percent for the year ended December 2018
- 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 December 2018, compared with December 2017, there was a decrease of 6.9 percent in total guest nights for the Hawke's Bay RTO area. Motels had the largest decrease, followed by holiday parks. Hotels had the only increase.

For the year ended December 2018, compared with the previous December year, total guest nights for the Hawke's Bay RTO area decreased 2.8 percent. Motels had the largest decrease, followed by backpackers. 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		
	December		Percentage change	Year ended		Percentage change
	2017	2018		December 2017	December 2018	
Guest nights						
Total guest nights	136,877	127,406	-6.9	1,247,406	1,211,876	-2.8
International	41,403	36,574	-11.7	342,653	319,524	-6.7
Domestic	95,474	90,833	-4.9	904,753	892,352	-1.4
Hotels	19,400	20,601	6.2	203,586	218,984	7.6
Motels/apartments	53,782	47,449	-11.8	585,132	555,247	-5.1
Backpackers	18,304	16,737	-8.6	164,742	137,143	-16.8
Holiday parks	45,391	42,619	-6.1	293,946	300,503	2.2
Occupancy rates <sup>(3)</sup> (%)						
Hotels	63.0	64.1	1.9	63.6	64.7	1.7
Motels/apartments	67.8	65.9	-2.7	67.8	68.9	1.6
Backpackers	64.6	68.3	5.7	46.0	47.7	3.7
Holiday parks	39.3	34.3	-12.6	24.4	23.2	-5.0
Total	55.8	53.7	-3.8	46.5	47.1	1.3
Total excluding holiday parks <sup>(4)</sup>	65.8	66.2	0.7	60.0	62.0	3.3
Average length of stay <sup>(5)</sup>						
Hotels	1.63	1.67	2.8	1.57	1.71	8.8
Motels/apartments	2.01	2.05	2.0	2.10	2.11	0.5
Backpackers	3.76	4.00	6.3	4.41	3.62	-18.0
Holiday parks	2.92	2.82	-3.2	2.85	2.99	5.0
Total	2.32	2.33	0.5	2.28	2.29	0.7
Guest arrivals						
Hotels	11,915	12,310	3.3	129,320	127,851	-1.1
Motels/apartments	26,711	23,093	-13.5	278,059	262,615	-5.6
Backpackers	4,869	4,187	-14.0	37,347	37,895	1.5
Holiday parks	15,559	15,094	-3.0	103,248	100,499	-2.7
Total	59,055	54,684	-7.4	547,974	528,859	-3.5
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	21	21	0.0	21	21	0.0
Total	121	116	-4.1	121	116	-4.1
Capacity <sup>(6)</sup>						
Hotels	16,926	16,833	-0.5	189,925	199,017	4.8
Motels/apartments	36,859	35,650	-3.3	447,012	428,343	-4.2
Backpackers	23,002	21,297	-7.4	298,070	243,828	-18.2
Holiday parks	46,159	47,647	3.2	568,257	540,845	-4.8
Total	122,946	121,427	-1.2	1,503,264	1,412,033	-6.1

(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 December 2018, international guests accounted for 28.7 percent of all guest nights in the Hawke's Bay RTO area. When compared with December 2017, the number of international guest nights spent in the area in December 2018 was down 11.7 percent to 36,574. Domestic guest nights decreased 4.9 percent, to 90,833, for the same period.

The proportion of the origin-of-guest estimate from actual data was 80 percent for December 2018.

Figure 3.1

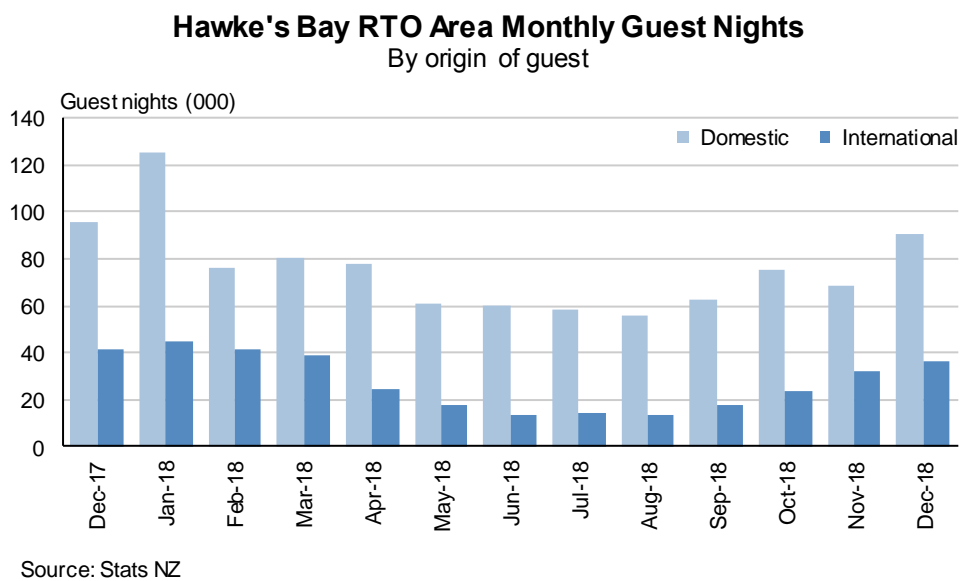


Table 3.1

**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>							
2017	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
	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
		Percent change from the current month of the previous year					
		-4.9	-11.7	-6.9	3.4	-0.9	1.4
<b>Year ended</b>							
December 2017		904,753	342,653	1,247,406	22,225,169	17,239,262	39,464,431
December 2018		892,352	319,524	1,211,876	22,777,803	17,589,177	40,366,980
		Percent change from previous year					
		-1.4	-6.7	-2.8	2.5	2.0	2.3

(1) Regional tourism organisation

## 4 National results

In December 2018, a total of 4,199,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 57,000 nights (1.4 percent) from December 2017. North Island guest nights were relatively unchanged (up 1,000 or 0.1 percent) while the South Island recorded an increase (up 55,000 or 3.1 percent).

Three of the four accommodation types recorded an increase in guest nights in December 2018, compared with December 2017. Hotels had the largest increase in guest nights (up 39,000 or 3.0 percent), followed by holiday parks (up 22,000 or 1.9 percent) and motels (up 19,000 or 1.6 percent). Backpackers had the only decrease in guest nights (down 24,000 or 4.6 percent).

For the year ended December 2018, there were 40,367,000 guest nights, an increase of 903,000 (2.29 percent) from the previous December year.

Refer to Table 4.1 for comparisons of data.

Table 4.1

<b>Hawke's Bay and New Zealand Guest Nights</b>					
<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
<b>December month</b>					
<b>Hawke's Bay RTO area</b>					
Hotels	16,370	19,400	20,601	18.5	6.2
Motels	54,550	53,782	47,449	-1.4	-11.8
Backpackers	18,064	18,304	16,737	1.3	-8.6
Holiday parks	42,388	45,391	42,619	7.1	-6.1
Total	131,372	136,877	127,406	4.2	-6.9
<b>New Zealand</b>					
Hotels	1,237,791	1,303,962	1,343,454	5.3	3.0
Motels	1,156,389	1,166,005	1,184,840	0.8	1.6
Backpackers	507,624	512,453	488,807	1.0	-4.6
Holiday parks	1,081,525	1,159,280	1,181,467	7.2	1.9
Total	3,983,330	4,141,700	4,198,568	4.0	1.4
<b>Year ended December</b>					
<b>Hawke's Bay RTO area</b>					
Hotels	175,586	203,586	218,984	15.9	7.6
Motels	579,751	585,132	555,247	0.9	-5.1
Backpackers	153,352	164,742	137,143	7.4	-16.8
Holiday parks	244,514	293,946	300,503	20.2	2.2
Total	1,153,203	1,247,406	1,211,876	8.2	-2.8
<b>New Zealand</b>					
Hotels	13,606,865	13,932,801	14,457,019	2.4	3.8
Motels	12,128,919	12,359,189	12,483,219	1.9	1.0
Backpackers	5,154,200	5,210,060	5,061,309	1.1	-2.9
Holiday parks	7,610,913	7,962,381	8,365,433	4.6	5.1
Total	38,500,897	39,464,431	40,366,980	2.5	2.3

## 5 Regional comparison

In December 2018, Mackenzie recorded the largest increase in guest nights (up 20,000 or 23.8 percent) from December 2017. This was followed by Queenstown (up 17,000 or 4.9 percent), Canterbury (up 13,000 or 3.4 percent), Coromandel (up 10,000 or 8.0 percent), and Auckland (up 8,000 or 1.3 percent).

Rotorua recorded the largest decrease (down 12,000 or 5.0 percent), followed Hawke's Bay (down 9,000 or 6.9 percent), Taupo (down 6,000 or 4.5 percent), Hurunui (down 4,000 or 11.1 percent), and Taranaki (down 3,000 or 4.9 percent).

Table 5.1

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

RTO area	December guest nights								
	Domestic			International			Total		
	2017	2018	Percent age change	2017	2018	Percent age change	2017	2018	Percent age change
Northland	172,990	170,427	-1.5	80,171	83,177	3.7	253,161	253,604	0.2
Auckland	334,905	331,995	-0.9	328,564	339,830	3.4	663,469	671,825	1.3
Coromandel	83,579	96,121	15.0	38,501	35,677	-7.3	122,080	131,798	8.0
Waikato	95,372	102,067	7.0	47,667	43,774	-8.2	143,039	145,841	2.0
Bay of Plenty	93,703	95,896	2.3	36,549	32,687	-10.6	130,251	128,583	-1.3
Rotorua	108,310	109,842	1.4	128,902	115,496	-10.4	237,211	225,338	-5.0
Taupo	74,720	72,793	-2.6	54,637	50,775	-7.1	129,357	123,568	-4.5
Whakatane-									
Kawerau	32,399	30,976	-4.4	8,224	6,685	-18.7	40,623	37,661	-7.3
Gisborne	38,859	40,167	3.4	7,648	5,266	-31.1	46,507	45,433	-2.3
Taranaki	56,378	53,003	-6.0	14,140	14,036	-0.7	70,518	67,039	-4.9
Hawke's Bay	95,474	90,833	-4.9	41,403	36,574	-11.7	136,877	127,406	-6.9
Ruapehu	23,913	22,596	-5.5	22,112	22,500	1.8	46,025	45,097	-2.0
Manawatu	35,879	40,580	13.1	7,451	7,515	0.9	43,331	48,095	11.0
Whanganui	13,290	14,662	10.3	5,424	5,921	9.2	18,713	20,583	10.0
Wairarapa	20,217	23,880	18.1	5,604	4,377	-21.9	25,821	28,257	9.4
Kapiti-Horowhenua	25,052	29,495	17.7	4,957	5,616	13.3	30,009	35,111	17.0
Wellington	143,605	150,437	4.8	89,162	85,527	-4.1	232,767	235,964	1.4
Marlborough	42,391	45,162	6.5	34,933	36,170	3.5	77,325	81,332	5.2
Nelson-Tasman	115,477	117,057	1.4	71,665	72,466	1.1	187,142	189,523	1.3
Canterbury	189,450	192,505	1.6	196,972	207,221	5.2	386,423	399,727	3.4
Hurunui	23,547	22,792	-3.2	15,159	11,624	-23.3	38,706	34,416	-11.1
Mackenzie	23,407	38,266	63.5	62,737	68,376	9.0	86,144	106,642	23.8
Timaru	22,129	22,152	0.1	11,187	11,470	2.5	33,317	33,622	0.9
West Coast	49,846	51,329	3.0	115,647	111,833	-3.3	165,493	163,162	-1.4
Wanaka	44,648	48,454	8.5	61,401	59,180	-3.6	106,049	107,635	1.5
Queenstown	91,943	108,916	18.5	260,528	260,667	0.1	352,472	369,583	4.9
Waitaki	31,263	28,922	-7.5	20,747	23,329	12.4	52,010	52,251	0.5
Central Otago	39,032	34,817	-10.8	9,949	11,864	19.3	48,981	46,681	-4.7
Dunedin	42,962	48,940	13.9	46,993	38,837	-17.4	89,955	87,777	-2.4
Clutha	6,230	6,581	5.6	4,134	4,733	14.5	10,364	11,315	9.2
Fiordland	21,139	25,002	18.3	71,569	71,899	0.5	92,708	96,902	4.5
Southland	23,178	23,035	-0.6	21,676	23,764	9.6	44,854	46,799	4.3
<b>Total</b>	<b>2,215,289</b>	<b>2,289,702</b>	<b>3.4</b>	<b>1,926,411</b>	<b>1,908,866</b>	<b>-0.9</b>	<b>4,141,700</b>	<b>4,198,568</b>	<b>1.4</b>

Table 5.2

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

RTO area	December 2018 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks <sup>(2)</sup>
	Percent					
Northland	52.7	65.7	50.0	30.8	41.0	57.1
Auckland	77.2	63.6	53.0	30.4	64.3	68.9
Coromandel	53.9	55.6	34.1	31.2	35.8	46.5
Waikato	57.7	61.6	50.4	31.8	48.1	58.0
Bay of Plenty	60.6	67.4	47.7	32.0	45.1	58.1
Rotorua	78.2	70.0	33.0	38.2	54.1	58.4
Taupo	60.5	64.4	47.8	29.7	48.3	57.2
Whakatane-Kawerau	C	59.4	C	19.4	27.2	52.8
Gisborne	C	63.4	C	18.6	30.1	54.4
Taranaki	47.4	42.5	44.4	32.2	39.6	44.6
Hawke's Bay	64.1	65.9	68.3	34.3	53.7	66.2
Ruapehu	49.7	35.9	24.5	48.2	35.6	33.1
Manawatu	37.4	52.2	C	C	40.0	C
Whanganui	C	49.3	59.4	C	37.6	C
Wairarapa	C	56.0	C	20.7	32.3	48.3
Kapiti-Horowhenua	C	60.2	C	26.3	27.8	29.4
Wellington	71.9	66.9	C	C	61.6	C
Marlborough	53.4	62.6	44.4	36.9	47.3	54.0
Nelson-Tasman	59.5	61.6	55.9	34.0	45.5	58.7
Canterbury	70.2	63.5	41.4	30.6	49.4	58.5
Hurunui	C	50.7	C	20.6	30.9	39.7
Mackenzie	C	70.0	C	70.5	74.1	75.9
Timaru	C	59.8	C	28.9	39.0	52.8
West Coast	59.8	63.6	45.4	36.6	50.5	56.2
Wanaka	67.9	82.5	68.5	46.6	58.4	71.8
Queenstown	84.2	72.3	78.3	46.3	75.4	80.0
Waitaki	46.4	64.4	35.6	9.3	18.2	52.1
Central Otago	31.8	63.5	49.2	19.5	27.3	50.5
Dunedin	61.8	67.9	38.1	43.1	55.6	58.9
Clutha	C	44.6	C	22.7	30.0	40.5
Fiordland	C	72.5	C	57.5	64.6	68.6
Southland	49.9	46.6	37.9	27.8	39.7	44.9
<b>Total</b>	69.6	62.4	48.2	30.8	49.9	60.8

(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	December 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	13,826	18,099	2.17	62.78
Backpackers	5	8,928	C	C	C
Holiday parks	10	20,243	17,084	2.56	32.85
<b>Total</b>	53	45,849	46,169	2.55	51.42
Napier City					
Hotels	9	12,152	C	C	C
Motels	26	19,468	26,254	2.02	68.02
Backpackers	7	11,935	9,099	3.47	68.33
Holiday parks	5	16,554	C	C	C
<b>Total</b>	47	60,109	71,606	2.31	62.16
Wairoa and Central Hawke's Bay Districts					
Hotels	4	1,829	C	C	C
Motels	5	2,356	3,096	1.76	66.92
Backpackers	1	434	C	C	C
Holiday parks	6	10,850	C	C	C
<b>Total</b>	16	15,469	9,632	1.74	27.50
Hawke's Bay Regional Tourism Organisation area					
Hotels	18	16,833	20,601	1.67	64.14
Motels	64	35,650	47,449	2.05	65.92
Backpackers	13	21,297	16,737	4.00	68.30
Holiday parks	21	47,647	42,619	2.82	34.31
<b>Total</b>	116	121,427	127,406	2.33	53.69

(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>