



Commercial Accommodation Monitor:

August 2018

Hawke's Bay

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Preface

Commercial Accommodation Monitor: August 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 September 2018 monitor will be released on 12 November 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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3 Origin of guests

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1 Highlights

Monthly highlights

In August 2018 compared with August 2017:

- Guest nights rose 11.0 percent to 69,694
- International guest nights rose 6.2 percent to 13,838
- Domestic guest nights rose 12.2 percent to 55,856
- The average length of stay rose from 2.06 nights to 2.38 nights
- The overall occupancy rate rose from 32.4 percent to 34.5 percent
- The occupancy rate, excluding holiday parks, was 49.4 percent in August 2018
- Accommodation capacity, excluding holiday parks, fell 2.0 percent.

Response rates for August 2018

The response rate for the Hawke's Bay RTO area was 79 percent for August 2018.

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

Figure 1.1

Hawke's Bay RTO Area Monthly Guest Nights

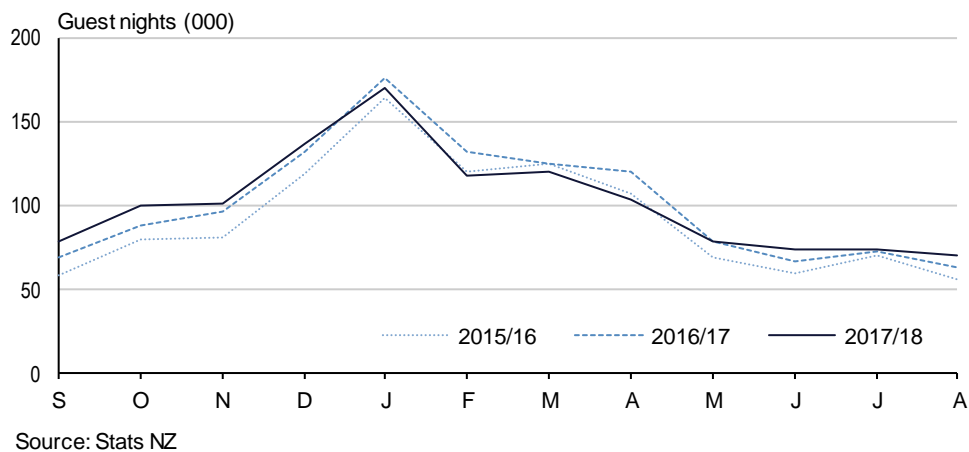
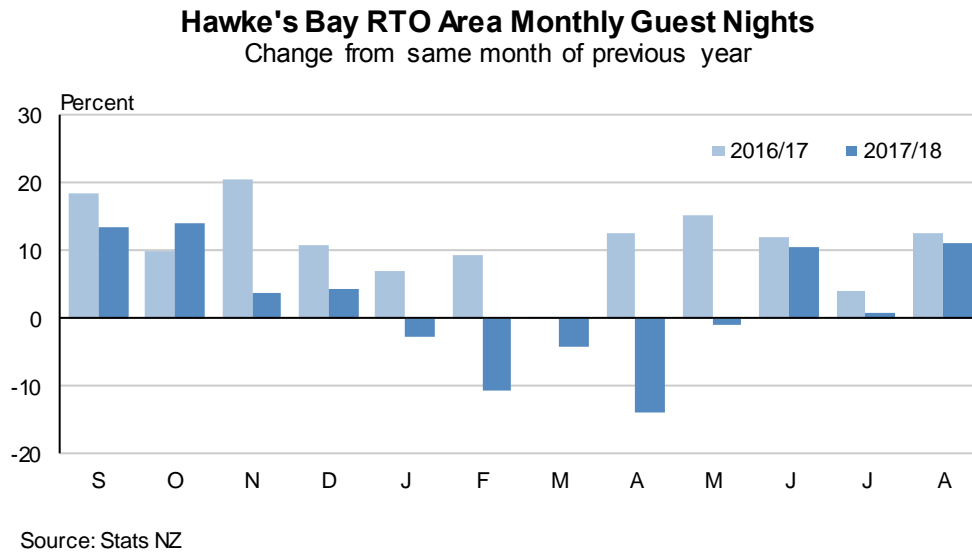


Figure 1.2

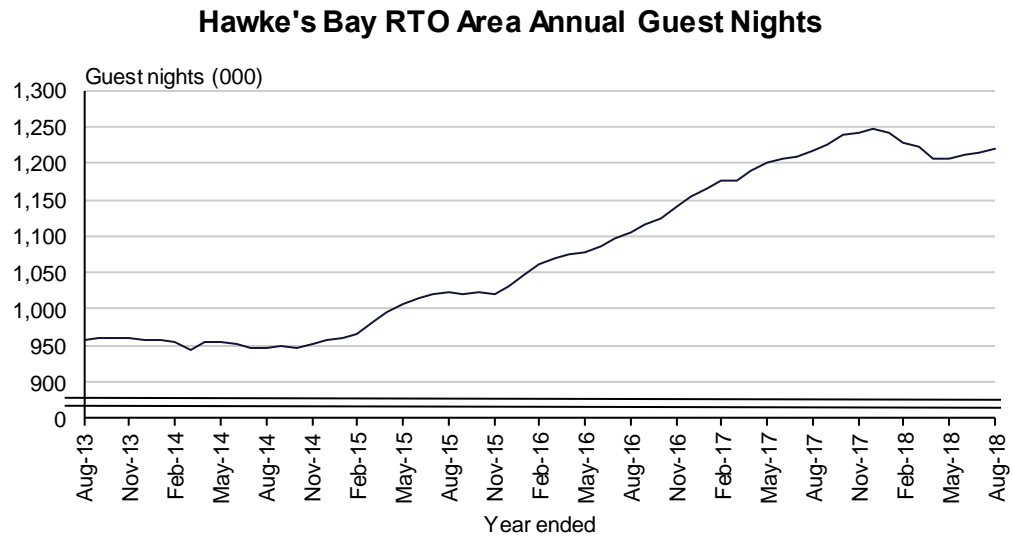


Year ended highlights

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

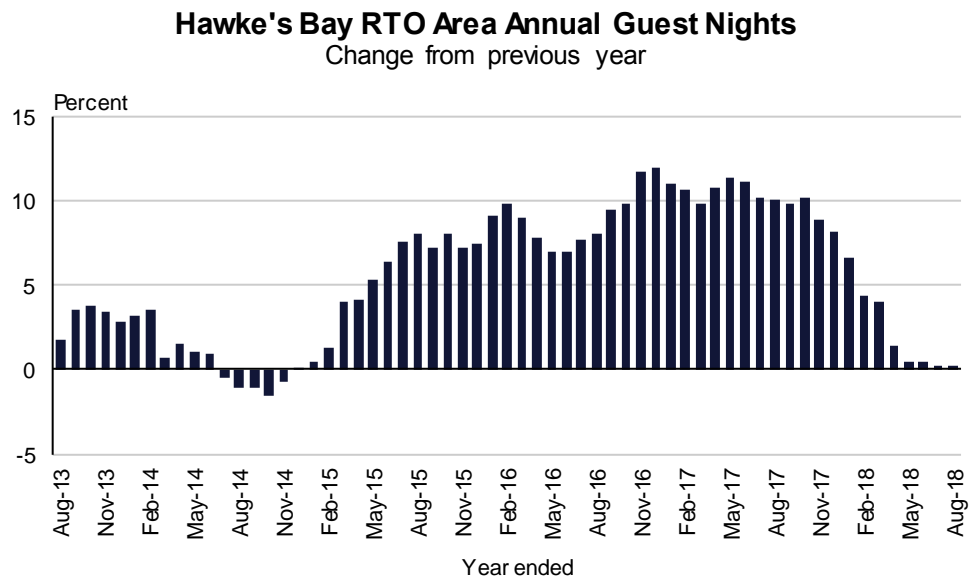
- Guest nights rose 0.3 percent to 1,219,955
- International guest nights fell 4.4 percent to 323,804
- Domestic guest nights rose 2.1 percent to 896,151
- The average length of stay rose from 2.23 nights to 2.30 nights
- The overall occupancy rate rose from 45.3 percent to 46.7 percent
- The occupancy rate, excluding holiday parks, was 60.7 percent for the year ended August 2018
- Accommodation capacity, excluding holiday parks, fell 5.6 percent.

Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

2 Accommodation variables

In August 2018, compared with August 2017, there was an increase of 11.0 percent in total guest nights for the Hawke's Bay RTO area. Motels had the largest increase, followed by holiday parks. Hotels had the only decrease.

For the year ended August 2018, compared with the previous August year, total guest nights for the Hawke's Bay RTO area increased 0.3 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		
	August		Percentage change	Year ended		Percentage change
	2017	2018		August 2017	August 2018	
Guest nights						
Total guest nights	62,793	69,694	11.0	1,216,663	1,219,955	0.3
International	13,032	13,838	6.2	338,638	323,804	-4.4
Domestic	49,761	55,856	12.2	878,025	896,151	2.1
Hotels	14,316	14,255	-0.4	192,502	213,213	10.8
Motels/apartments	32,573	38,603	18.5	589,373	561,330	-4.8
Backpackers	6,467	6,632	2.6	162,924	143,530	-11.9
Holiday parks	9,438	10,204	8.1	271,863	301,882	11.0
Occupancy rates ⁽³⁾ (%)						
Hotels	50.2	54.0	7.4	62.0	63.9	3.2
Motels/apartments	54.8	61.3	12.0	66.8	68.4	2.4
Backpackers	24.6	25.1	2.0	45.4	45.5	0.3
Holiday parks	11.0	10.6	-3.4	23.2	23.5	1.3
Total	32.4	34.5	6.3	45.3	46.7	3.1
Total excluding holiday parks ⁽⁴⁾	44.9	49.4	10.0	58.9	60.7	3.0
Average length of stay ⁽⁵⁾						
Hotels	1.35	1.76	30.5	1.56	1.69	8.5
Motels/apartments	2.09	2.31	10.3	2.07	2.13	3.0
Backpackers	3.45	4.10	18.6	4.90	3.67	-25.0
Holiday parks	3.84	3.54	-7.7	2.64	2.99	13.1
Total	2.06	2.38	15.4	2.23	2.30	3.1
Guest arrivals						
Hotels	10,606	8,094	-23.7	123,243	125,830	2.1
Motels/apartments	15,583	16,746	7.5	285,393	263,949	-7.5
Backpackers	1,872	1,618	-13.5	33,283	39,093	17.5
Holiday parks	2,460	2,883	17.2	102,997	101,129	-1.8
Total	30,520	29,342	-3.9	544,916	530,001	-2.7
Establishments						
Hotels	18	19	5.6	18	19	5.6
Motels/apartments	68	66	-2.9	68	66	-2.9
Backpackers	14	13	-7.1	14	13	-7.1
Holiday parks	18	20	11.1	18	20	11.1
Total	118	118	0.0	118	118	0.0
Capacity ⁽⁶⁾						
Hotels	16,771	16,926	0.9	184,280	198,835	7.9
Motels/apartments	37,200	36,704	-1.3	456,865	432,534	-5.3
Backpackers	22,475	21,297	-5.2	305,606	262,619	-14.1
Holiday parks	44,299	46,717	5.5	582,300	537,102	-7.8
Total	120,745	121,644	0.7	1,529,051	1,431,090	-6.4

(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 August 2018, international guests accounted for 19.9 percent of all guest nights in the Hawke's Bay RTO area. When compared with August 2017, the number of international guest nights spent in the area in August 2018 was up 6.2 percent to 13,838. Domestic guest nights increased 12.2 percent, to 55,856, for the same period.

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

Figure 3.1

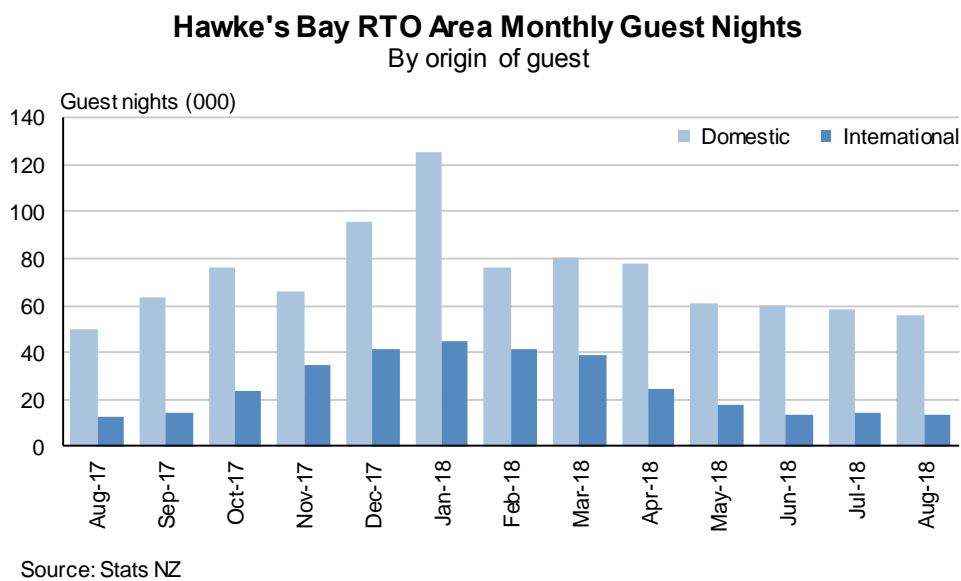


Table 3.1

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	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
	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
Percent change from the current month of the previous year							
		12.2	6.2	11.0	5.3	0.4	3.4
Year ended							
August 2017		878,025	338,638	1,216,663	22,044,038	16,942,870	38,986,909
August 2018		896,151	323,804	1,219,955	22,456,939	17,523,822	39,980,761
Percent change from previous year							
		2.1	-4.4	0.3	1.9	3.4	2.5

(1) Regional tourism organisation

4 National results

In August 2018, a total of 2,524,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 84,000 nights (3.4 percent) from August 2017. Both the North Island (up 79,000 or 5.4 percent) and South Island (up 5,000 or 0.5 percent) recorded an increase.

Three of the four accommodation types recorded an increase in guest nights in August 2018, compared with August 2017. Hotels had the largest increase in guest nights (up 42,000 or 4.0 percent), followed by motels (up 30,000 or 3.6 percent), and holiday parks (up 24,000 or 8.1 percent). Backpackers had the only decrease in guest nights (down 11,000 or 3.7 percent).

For the year ended August 2018, there were 39,981,000 guest nights, an increase of 994,000 (2.5 percent) from the previous August 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	
	2016	2017	2018	2016 to 2017	2017 to 2018
August month					
Hawke's Bay RTO area					
Hotels	11,065	14,316	14,255	29.4	-0.4
Motels	31,692	32,573	38,603	2.8	18.5
Backpackers	6,779	6,467	6,632	-4.6	2.6
Holiday parks	6,314	9,438	10,204	49.5	8.1
Total	55,850	62,793	69,694	12.4	11.0
New Zealand					
Hotels	1,027,324	1,027,233	1,068,787	0.0	4.0
Motels	833,455	818,685	848,372	-1.8	3.6
Backpackers	306,157	305,590	294,424	-0.2	-3.7
Holiday parks	282,077	289,089	312,599	2.5	8.1
Total	2,449,012	2,440,597	2,524,181	-0.3	3.4
Year ended August					
Hawke's Bay RTO area					
Hotels	165,275	192,502	213,213	16.5	10.8
Motels	553,613	589,373	561,330	6.5	-4.8
Backpackers	152,557	162,924	143,530	6.8	-11.9
Holiday parks	233,953	271,863	301,882	16.2	11.0
Total	1,105,398	1,216,663	1,219,955	10.1	0.3
New Zealand					
Hotels	13,442,292	13,759,198	14,254,660	2.4	3.6
Motels	11,860,754	12,298,184	12,403,182	3.7	0.9
Backpackers	5,122,950	5,172,628	5,087,753	1.0	-1.6
Holiday parks	7,456,703	7,756,898	8,235,166	4.0	6.2
Total	37,882,700	38,986,909	39,980,761	2.9	2.5

5 Regional comparison

In August 2018, Auckland recorded the largest increase in guest nights (up 33,000 or 6.2 percent) from August 2017. This was followed by Canterbury (up 27,000 or 12.3 percent), Waikato (up 10,000 or 11.9 percent), Wellington (up 8,000 or 4.4 percent), and Hawke's Bay (up 7,000 or 11.0 percent).

Marlborough recorded the largest decrease (down 14,000 or 29.3 percent), followed by Nelson-Tasman (down 8,000 or 11.4 percent), West Coast (down 6,000 or 9.7 percent), Queenstown (down 5,000 or 1.6 percent), and Hurunui (down 2,000 or 9.0 percent).

Table 5.1

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

RTO area	August guest nights								
	Domestic			International			Total		
	2017	2018	Percent age change	2017	2018	Percent age change	2017	2018	Percent age change
Northland	54,203	57,762	6.6	29,080	29,213	0.5	83,283	86,975	4.4
Auckland	307,730	328,885	6.9	229,884	242,055	5.3	537,614	570,940	6.2
Coromandel	26,164	27,100	3.6	8,932	9,022	1.0	35,096	36,123	2.9
Waikato	64,546	74,244	15.0	18,837	19,103	1.4	83,383	93,347	11.9
Bay of Plenty	51,811	52,750	1.8	15,307	14,142	-7.6	67,118	66,892	-0.3
Rotorua	84,899	92,344	8.8	55,154	47,091	-14.6	140,053	139,435	-0.4
Taupo	47,927	50,916	6.2	19,636	20,816	6.0	67,563	71,731	6.2
Whakatane-									
Kawerau	10,134	9,949	-1.8	2,839	1,657	-41.6	12,973	11,606	-10.5
Gisborne	20,170	18,522	-8.2	2,023	1,912	-5.5	22,192	20,433	-7.9
Taranaki	30,018	31,013	3.3	5,244	5,051	-3.7	35,262	36,063	2.3
Hawke's Bay	49,761	55,856	12.2	13,032	13,838	6.2	62,793	69,694	11.0
Ruapehu	38,904	44,181	13.6	8,748	7,578	-13.4	47,651	51,759	8.6
Manawatu	33,568	37,312	11.2	3,988	5,786	45.1	37,555	43,098	14.8
Whanganui	9,692	11,171	15.3	2,292	1,567	-31.6	11,984	12,738	6.3
Wairarapa	9,625	13,381	39.0	1,712	1,318	-23.0	11,337	14,698	29.6
Kapiti-Horowhenua	12,030	13,061	8.6	1,398	1,548	10.8	13,427	14,610	8.8
Wellington	131,032	146,016	11.4	53,661	46,747	-12.9	184,693	192,763	4.4
Marlborough	30,958	23,852	-23.0	16,005	9,337	-41.7	46,963	33,189	-29.3
Nelson-Tasman	51,479	44,203	-14.1	15,953	15,537	-2.6	67,433	59,740	-11.4
Canterbury	137,036	148,685	8.5	82,600	97,916	18.5	219,636	246,601	12.3
Hurunui	16,613	14,663	-11.7	6,197	6,090	-1.7	22,809	20,753	-9.0
Mackenzie	21,641	16,856	-22.1	29,060	35,465	22.0	50,701	52,320	3.2
Timaru	11,911	13,569	13.9	3,777	3,179	-15.8	15,688	16,748	6.8
West Coast	27,412	26,640	-2.8	34,272	29,059	-15.2	61,683	55,700	-9.7
Wanaka	23,874	27,164	13.8	44,177	47,691	8.0	68,051	74,855	10.0
Queenstown	94,836	98,601	4.0	196,972	188,400	-4.4	291,808	287,000	-1.6
Waitaki	12,122	12,858	6.1	8,229	7,958	-3.3	20,350	20,816	2.3
Central Otago	10,026	11,253	12.2	2,415	2,694	11.5	12,441	13,946	12.1
Dunedin	42,392	40,235	-5.1	17,014	17,962	5.6	59,405	58,197	-2.0
Clutha	3,333	3,946	18.4	1,199	906	-24.4	4,532	4,852	7.1
Fiordland	8,189	6,781	-17.2	13,183	15,369	16.6	21,372	22,150	3.6
Southland	18,145	17,734	-2.3	5,599	6,675	19.2	23,744	24,409	2.8
Total	1,492,179	1,571,502	5.3	948,419	952,679	0.4	2,440,597	2,524,181	3.4

Table 5.2

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

RTO area	August 2018 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks ⁽²⁾
	Percent					
Northland	25.2	43.3	28.9	7.8	18.3	33.8
Auckland	77.9	62.5	42.0	11.9	60.3	66.7
Coromandel	35.5	28.1	10.1	9.0	12.8	21.2
Waikato	58.9	59.4	26.9	8.8	35.6	51.4
Bay of Plenty	51.3	61.2	27.8	13.5	29.4	45.7
Rotorua	62.6	51.1	20.3	15.9	37.4	43.2
Taupo	48.5	47.2	25.5	12.8	30.3	39.4
Whakatane-Kawerau	C	41.7	C	4.3	12.6	37.4
Gisborne	C	48.0	C	5.7	18.8	46.0
Taranaki	45.3	44.5	17.0	9.8	27.3	39.9
Hawke's Bay	54.0	61.3	25.1	10.6	34.5	49.4
Ruaapehu	60.9	41.0	C	C	42.9	C
Manawatu	43.2	53.0	C	C	39.4	C
Whanganui	C	50.2	44.5	C	29.2	C
Wairarapa	47.3	45.5	C	C	22.7	C
Kapiti-Horowhenua	C	52.5	C	10.4	15.8	23.0
Wellington	73.1	68.3	C	C	59.7	C
Marlborough	31.0	45.9	20.6	10.2	24.5	34.4
Nelson-Tasman	44.1	40.3	31.8	8.7	22.4	37.0
Canterbury	60.8	50.1	28.3	13.5	35.9	47.2
Hurunui	C	41.9	C	11.2	22.1	31.2
Mackenzie	C	43.9	C	16.7	39.3	51.4
Timaru	C	55.1	C	11.0	26.4	47.9
West Coast	27.6	32.1	15.0	9.0	20.7	25.1
Wanaka	75.6	90.5	55.1	14.6	41.1	71.0
Queenstown	78.2	68.0	C	C	65.1	C
Waitaki	32.2	42.4	18.1	8.3	20.4	34.7
Central Otago	C	45.5	C	3.9	9.4	26.5
Dunedin	49.6	58.8	31.5	16.3	42.4	49.4
Clutha	C	63.0	C	C	23.2	C
Fiordland	19.7	26.5	C	C	17.3	C
Southland	35.5	46.7	14.4	7.9	27.4	34.8
Total	62.6	52.1	32.1	10.8	36.5	50.2

(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	August 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	13,857	13,123	2.62	56.39
Backpackers	5	8,928	C	C	C
Holiday parks	10	20,243	C	C	C
Total	53	45,880	20,303	2.70	27.88
Napier City					
Hotels	9	12,152	11,530	1.72	59.77
Motels	28	20,491	22,340	2.10	64.34
Backpackers	7	11,935	4,634	4.28	29.40
Holiday parks	5	16,554	6,394	4.43	17.04
Total	49	61,132	44,898	2.26	43.80
Wairoa and Central Hawke's Bay Districts					
Hotels	5	1,922	C	C	C
Motels	5	2,356	3,140	2.90	64.52
Backpackers	1	434	C	C	C
Holiday parks	5	9,920	C	C	C
Total	16	14,632	4,493	2.32	16.25
Hawke's Bay Regional Tourism Organisation area					
Hotels	19	16,926	14,255	1.76	53.95
Motels	66	36,704	38,603	2.31	61.35
Backpackers	13	21,297	6,632	4.10	25.12
Holiday parks	20	46,717	10,204	3.54	10.58
Total	118	121,644	69,694	2.38	34.48

(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