



# Commercial Accommodation Monitor:

March 2019

Hawke's Bay

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# Preface

Commercial Accommodation Monitor: March 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 April 2019 monitor will be released on 17 June 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 March 2019 compared with March 2018:

- Guest nights rose 5.0 percent to 125,859
- International guest nights fell 2.9 percent to 38,041
- Domestic guest nights rose 8.8 percent to 87,818
- The average length of stay rose from 2.20 nights to 2.27 nights
- The overall occupancy rate rose from 53.4 percent to 60.1 percent
- The occupancy rate, excluding holiday parks, was 78.6 percent in March 2019
- Accommodation capacity, excluding holiday parks, fell 0.9 percent.

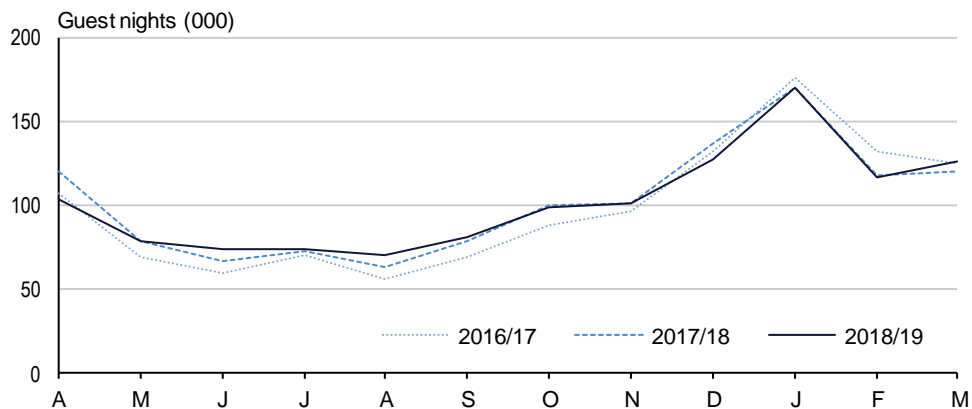
## Response rates for March 2019

The response rate for the Hawke's Bay RTO area was 78 percent for March 2019.

The proportion of the origin-of-guest estimate from unadjusted data was 75 percent.

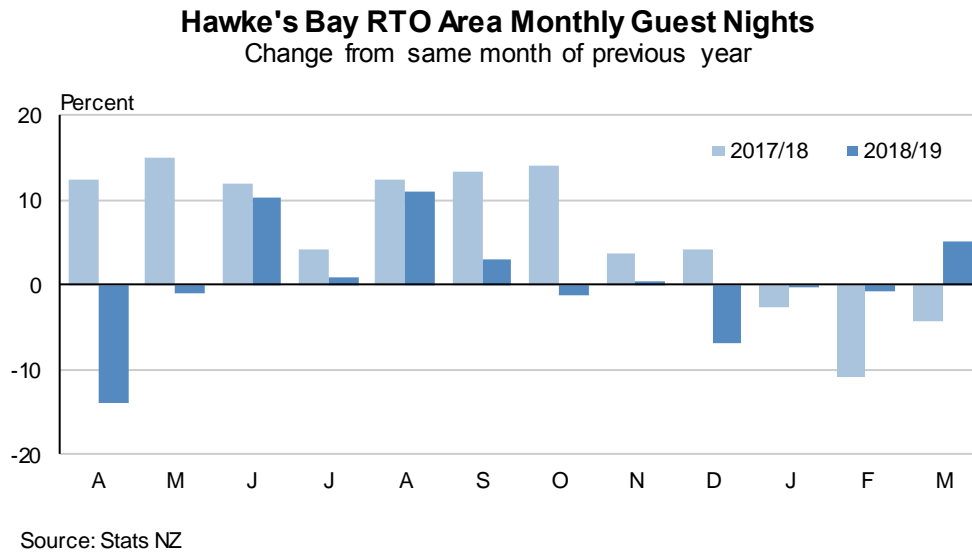
Figure 1.1

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



Source: Stats NZ

Figure 1.2

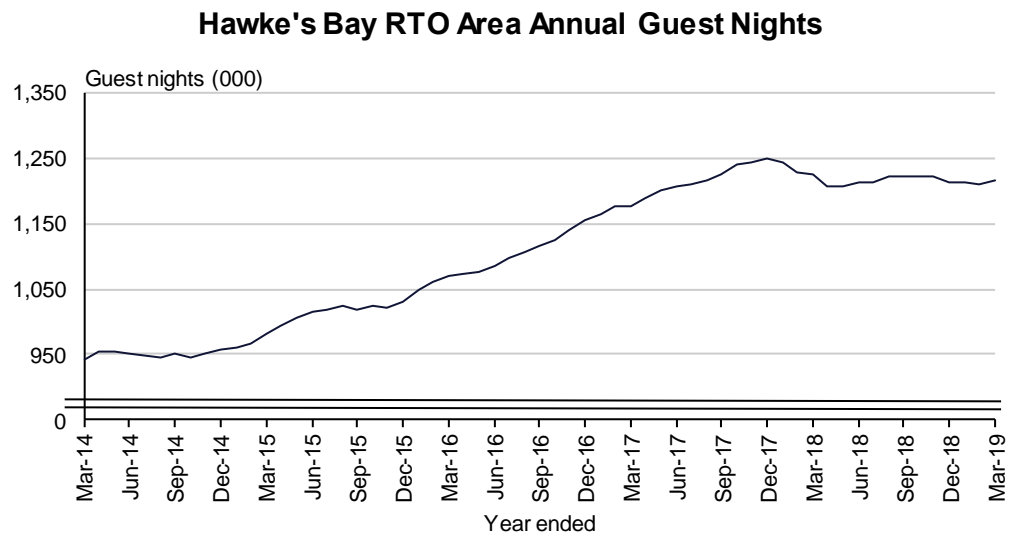


## Year ended highlights

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

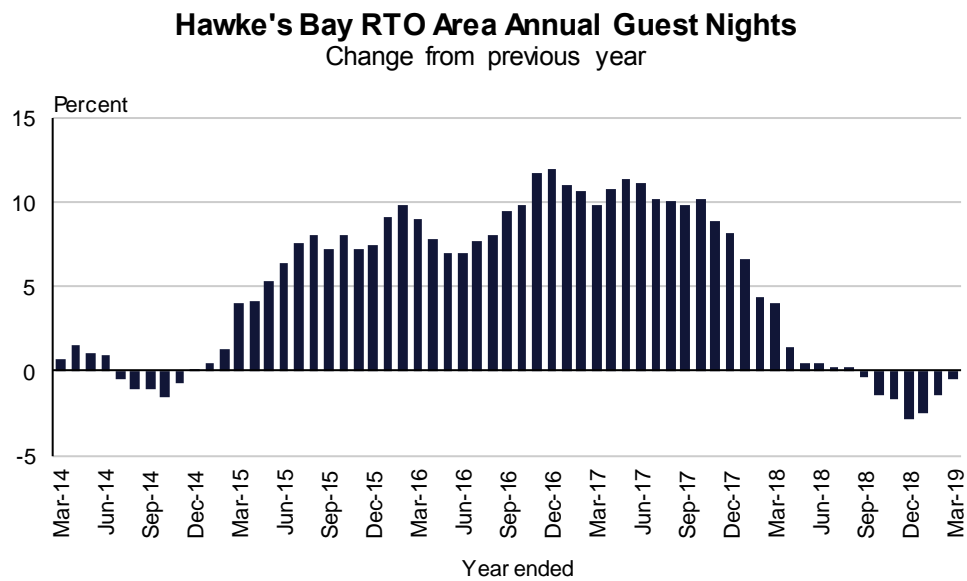
- Guest nights fell 0.5 percent to 1,216,607
- International guest nights fell 8.5 percent to 307,815
- Domestic guest nights rose 2.5 percent to 908,792
- The average length of stay rose from 2.28 nights to 2.30 nights
- The overall occupancy rate rose from 45.9 percent to 47.3 percent
- The occupancy rate, excluding holiday parks, was 62.3 percent for the year ended March 2019
- Accommodation capacity, excluding holiday parks, fell 6.2 percent.

Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

## 2 Accommodation variables

In March 2019, compared with March 2018, there was an increase of 5.0 percent in total guest nights for the Hawke's Bay RTO area. Motels had the largest increase, followed by backpackers.

For the year ended March 2019, compared with the previous March year, total guest nights for the Hawke's Bay RTO area decreased 0.5 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		
	March		Percentage change	Year ended		Percentage change
	2018	2019		March 2018	March 2019	
Guest nights						
Total guest nights	119,860	125,859	5.0	1,222,944	1,216,607	-0.5
International	39,168	38,041	-2.9	336,370	307,815	-8.5
Domestic	80,692	87,818	8.8	886,574	908,792	2.5
Hotels	21,885	22,290	1.8	206,851	219,555	6.1
Motels/apartments	53,127	55,715	4.9	559,672	553,233	-1.2
Backpackers	13,818	15,732	13.8	154,656	134,476	-13.0
Holiday parks	31,028	32,122	3.5	301,765	309,342	2.5
Occupancy rates <sup>(3)</sup> (%)						
Hotels	74.2	75.1	1.2	63.5	65.1	2.5
Motels/apartments	74.4	78.3	5.2	67.1	68.6	2.3
Backpackers	54.1	82.0	51.5	44.6	48.8	9.4
Holiday parks	28.4	31.3	10.3	23.3	23.7	1.7
Total	53.4	60.1	12.7	45.9	47.3	3.0
Total excluding holiday parks <sup>(4)</sup>	68.6	78.6	14.6	59.3	62.3	5.1
Average length of stay <sup>(5)</sup>						
Hotels	1.74	1.79	2.8	1.62	1.72	5.8
Motels/apartments	2.05	2.04	0.0	2.10	2.09	-0.3
Backpackers	3.26	6.08	86.6	3.82	4.28	12.0
Holiday parks	2.64	2.42	-8.3	2.97	2.90	-2.5
Total	2.20	2.27	3.1	2.28	2.30	0.6
Guest arrivals						
Hotels	12,554	12,436	-0.9	127,317	127,691	0.3
Motels/apartments	25,977	27,249	4.9	266,415	264,232	-0.8
Backpackers	4,243	2,589	-39.0	40,496	31,427	-22.4
Holiday parks	11,765	13,279	12.9	101,482	106,655	5.1
Total	54,540	55,554	1.9	535,710	530,006	-1.1
Establishments						
Hotels	19	18	-5.3	19	18	-5.3
Motels/apartments	66	64	-3.0	66	64	-3.0
Backpackers	13	13	0.0	13	13	0.0
Holiday parks	20	21	5.0	20	21	5.0
Total	118	116	-1.7	118	116	-1.7
Capacity <sup>(6)</sup>						
Hotels	16,926	16,895	-0.2	194,248	198,171	2.0
Motels/apartments	36,642	35,712	-2.5	439,315	425,333	-3.2
Backpackers	21,235	21,545	1.5	287,844	240,949	-16.3
Holiday parks	45,663	47,647	4.3	544,891	548,241	0.6
Total	120,466	121,799	1.1	1,466,298	1,412,694	-3.7

(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:**

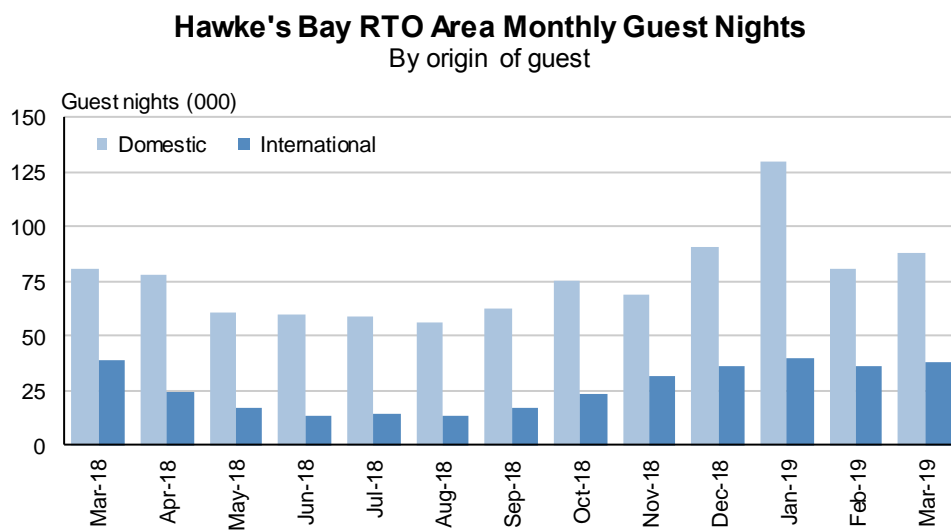
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### 3 Origin of guests

In March 2019, international guests accounted for 30.2 percent of all guest nights in the Hawke's Bay RTO area. When compared with March 2018, the number of international guest nights spent in the area in March 2019 was down 2.9 percent to 38,041. Domestic guest nights increased 8.8 percent, to 87,818, for the same period.

The proportion of the origin-of-guest estimate from actual data was 75 percent for March 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	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
	Feb	80,567	36,040	116,607	1,988,788	2,026,586	4,015,374
	Mar	87,818	38,041	125,859	2,125,847	1,882,162	4,008,009
Percent change from the current month of the previous year							
		8.8	-2.9	5.0	-2.5	-5.7	-4.0
<b>Year ended</b>							
March 2018		886,574	336,370	1,222,944	22,336,355	17,589,971	39,926,326
March 2019		908,792	307,815	1,216,607	22,801,640	17,379,925	40,181,565
Percent change from previous year							
		2.5	-8.5	-0.5	2.1	-1.2	0.6

(1) Regional tourism organisation

## 4 National results

In March 2019, a total of 4,008,000 guest nights were spent in short-term commercial accommodation in New Zealand, a decrease of 168,000 nights (4.0 percent) from March 2018. Both the North Island (down 42,000 or 1.8 percent) and South Island (down 127,000 or 7.0 percent) recorded a decrease.

All four accommodation types recorded a decrease in guest nights in March 2019, compared with March 2018.

Holiday parks had the largest decrease in guest nights (down 93,000 or 9.8 percent), followed by motels (down 37,000 or 2.9 percent), backpackers (down 29,000 or 5.2 percent), and hotels (down 10,000 or 0.7 percent).

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	
	2017	2018	2019	2017 to 2018	2018 to 2019
<b>March month</b>					
<b>Hawke's Bay RTO area</b>					
Hotels	19,458	21,885	22,290	12.5	1.8
Motels	56,376	53,127	55,715	-5.8	4.9
Backpackers	20,407	13,818	15,732	-32.3	13.8
Holiday parks	28,905	31,028	32,122	7.3	3.5
Total	125,146	119,860	125,859	-4.2	5.0
<b>New Zealand</b>					
Hotels	1,319,617	1,397,036	1,387,506	5.9	-0.7
Motels	1,218,959	1,269,177	1,232,259	4.1	-2.9
Backpackers	564,612	559,803	530,928	-0.9	-5.2
Holiday parks	762,854	950,438	857,316	24.6	-9.8
Total	3,866,041	4,176,455	4,008,009	8.0	-4.0
<b>Year ended March</b>					
<b>Hawke's Bay RTO area</b>					
Hotels	185,803	206,851	219,555	11.3	6.1
Motels	582,848	559,672	553,233	-4.0	-1.2
Backpackers	156,182	154,656	134,476	-1.0	-13.0
Holiday parks	251,290	301,765	309,342	20.1	2.5
Total	1,176,124	1,222,944	1,216,607	4.0	-0.5
<b>New Zealand</b>					
Hotels	13,608,694	14,159,505	14,457,750	4.0	2.1
Motels	12,116,088	12,378,138	12,437,360	2.2	0.5
Backpackers	5,160,611	5,181,864	4,982,850	0.4	-3.8
Holiday parks	7,532,883	8,206,819	8,303,605	8.9	1.2
Total	38,418,275	39,926,326	40,181,565	3.9	0.6

## 5 Regional comparison

In March 2019, West Coast recorded the largest decrease in guest nights (down 25,000 or 14.4 percent) from March 2018. This was followed by Northland (down 21,000 or 9.9 percent), Nelson-Tasman (down 21,000 or 12.3 percent), Rotorua (down 17,000 or 7.1 percent), and Taupo (down 13,000 or 10.7 percent).

Waikato recorded the largest increase (up 13,000 or 8.8 percent), followed by Wellington (up 9,000 or 3.4 percent), Hawke's Bay (up 6,000 or 5.0 percent), Mackenzie (up 3,000 or 3.3 percent), and Manawatu (up 3,000 or 4.7 percent).

Table 5.1

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

RTO area	March guest nights								
	Domestic			International			Total		
	2018	2019	Percent age change	2018	2019	Percent age change	2018	2019	Percent age change
Northland	130,831	115,581	-11.7	82,014	76,240	-7.0	212,845	191,821	-9.9
Auckland	353,304	357,966	1.3	354,927	344,393	-3.0	708,230	702,359	-0.8
Coromandel	62,894	59,593	-5.2	39,304	37,919	-3.5	102,197	97,512	-4.6
Waikato	99,683	116,496	16.9	47,209	43,289	-8.3	146,892	159,785	8.8
Bay of Plenty	87,268	86,971	-0.3	33,039	32,754	-0.9	120,307	119,725	-0.5
Rotorua	116,347	111,971	-3.8	120,608	108,239	-10.3	236,955	220,211	-7.1
Taupo	66,345	60,323	-9.1	53,251	46,421	-12.8	119,596	106,744	-10.7
Whakatane-Kawerau	22,399	19,900	-11.2	7,715	6,558	-15.0	30,115	26,458	-12.1
Gisborne	33,932	33,693	-0.7	6,169	7,973	29.2	40,102	41,666	3.9
Taranaki	57,008	55,293	-3.0	14,311	13,433	-6.1	71,318	68,726	-3.6
Hawke's Bay	80,692	87,818	8.8	39,168	38,041	-2.9	119,860	125,859	5.0
Ruapehu	26,282	25,998	-1.1	20,739	18,535	-10.6	47,021	44,534	-5.3
Manawatu	47,135	51,700	9.7	9,490	7,594	-20.0	56,625	59,293	4.7
Whanganui	15,314	14,421	-5.8	6,001	5,175	-13.8	21,315	19,596	-8.1
Wairarapa	23,807	22,020	-7.5	5,819	5,126	-11.9	29,626	27,146	-8.4
Kapiti-Horowhenua	23,636	25,039	5.9	5,597	5,078	-9.3	29,234	30,117	3.0
Wellington	165,718	176,228	6.3	98,819	97,365	-1.5	264,537	273,593	3.4
Marlborough	50,044	43,693	-12.7	45,183	40,894	-9.5	95,226	84,587	-11.2
Nelson-Tasman	93,265	76,216	-18.3	76,562	72,740	-5.0	169,826	148,955	-12.3
Canterbury	196,520	192,844	-1.9	211,054	205,767	-2.5	407,574	398,611	-2.2
Hurunui	26,286	19,974	-24.0	14,505	11,825	-18.5	40,791	31,799	-22.0
Mackenzie	23,388	24,687	5.6	61,972	63,511	2.5	85,359	88,197	3.3
Timaru	24,909	19,356	-22.3	13,274	12,424	-6.4	38,183	31,781	-16.8
West Coast	58,327	47,957	-17.8	116,780	102,001	-12.7	175,107	149,959	-14.4
Wanaka	34,921	32,912	-5.8	66,364	58,436	-11.9	101,285	91,348	-9.8
Queenstown	85,949	81,259	-5.5	255,533	256,779	0.5	341,482	338,037	-1.0
Waitaki	28,275	23,635	-16.4	22,968	21,035	-8.4	51,242	44,669	-12.8
Central Otago	27,592	21,979	-20.3	10,827	7,530	-30.4	38,419	29,509	-23.2
Dunedin	57,143	59,184	3.6	51,315	38,534	-24.9	108,457	97,719	-9.9
Clutha	7,275	6,858	-5.7	5,489	5,475	-0.3	12,764	12,334	-3.4
Fiordland	26,017	24,794	-4.7	72,109	66,346	-8.0	98,126	91,140	-7.1
Southland	27,883	29,489	5.8	27,953	24,732	-11.5	55,836	54,221	-2.9
<b>Total</b>	<b>2,180,388</b>	<b>2,125,847</b>	<b>-2.5</b>	<b>1,996,067</b>	<b>1,882,162</b>	<b>-5.7</b>	<b>4,176,455</b>	<b>4,008,009</b>	<b>-4.0</b>

Table 5.2

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

RTO area	March 2019 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks <sup>(2)</sup>
	Percent					
Northland	60.8	70.0	39.7	19.9	34.9	58.2
Auckland	85.3	71.0	60.9	33.7	71.7	76.8
Coromandel	58.8	59.4	31.5	24.0	31.0	47.6
Waikato	83.0	71.9	50.3	30.7	55.6	69.7
Bay of Plenty	83.0	73.6	49.5	29.9	47.8	65.7
Rotorua	85.9	76.7	36.4	34.7	57.8	64.2
Taupo	65.1	66.5	50.6	24.7	48.6	60.3
Whakatane-Kawerau	C	70.6	C	14.2	26.4	63.5
Gisborne	C	72.4	C	15.5	29.7	62.3
Taranaki	49.9	62.7	36.5	32.1	44.8	53.1
Hawke's Bay	75.1	78.3	82.0	31.3	60.1	78.6
Ruaapehu	53.3	37.3	30.8	39.2	37.8	37.5
Manawatu	54.9	71.2	C	C	50.5	C
Whanganui	C	56.8	52.6	C	38.6	C
Wairarapa	C	63.7	C	20.1	34.4	53.4
Kapiti-Horowhenua	C	73.9	C	19.4	27.1	35.8
Wellington	86.7	80.8	C	C	76.9	C
Marlborough	74.0	77.1	51.3	40.2	56.3	66.7
Nelson-Tasman	67.5	69.6	66.9	21.5	43.1	68.1
Canterbury	81.5	77.2	52.3	26.5	55.7	70.7
Hurunui	58.7	56.1	32.9	20.7	35.0	47.3
Mackenzie	C	70.8	C	47.8	67.5	77.5
Timaru	C	68.5	C	26.2	41.3	62.4
West Coast	61.5	68.8	44.3	35.4	51.6	58.0
Wanaka	68.0	84.6	77.6	36.9	55.3	76.1
Queenstown	86.2	75.1	80.1	44.6	76.9	82.1
Waitaki	52.6	72.0	46.5	9.0	19.5	59.4
Central Otago	C	75.5	C	8.2	20.0	54.7
Dunedin	81.2	81.1	44.9	44.4	67.2	73.1
Clutha	C	63.3	C	19.4	32.4	50.8
Fiordland	81.0	73.1	67.0	52.5	65.7	73.3
Southland	57.8	61.9	45.9	25.6	46.4	55.7
<b>Total</b>	<b>78.7</b>	<b>71.5</b>	<b>53.9</b>	<b>25.7</b>	<b>53.2</b>	<b>68.8</b>

(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	March 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	22,547	2.72	71.29
Backpackers	5	9,176	C	C	C
Holiday parks	10	20,243	13,627	2.12	32.25
<b>Total</b>	53	46,190	46,155	2.70	62.99
Napier City					
Hotels	9	12,152	17,977	1.73	83.74
Motels	26	19,499	29,712	1.79	82.93
Backpackers	7	11,935	9,316	5.14	58.68
Holiday parks	5	16,554	14,337	3.19	39.27
<b>Total</b>	47	60,140	71,342	2.14	66.26
Wairoa and Central Hawke's Bay Districts					
Hotels	4	1,829	C	C	C
Motels	5	2,356	3,456	1.47	80.83
Backpackers	1	434	C	C	C
Holiday parks	6	10,850	4,157	1.75	17.59
<b>Total</b>	16	15,469	8,363	1.63	27.79
Hawke's Bay Regional Tourism Organisation area					
Hotels	18	16,895	22,290	1.79	75.09
Motels	64	35,712	55,715	2.04	78.27
Backpackers	13	21,545	15,732	6.08	82.02
Holiday parks	21	47,647	32,122	2.42	31.35
<b>Total</b>	116	121,799	125,859	2.27	60.14

(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>