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Commercial Accommodation Monitor:

November 2011

West Coast

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Preface

Commercial Accommodation Monitor: November 2011 – West Coast presents comprehensive and impartial information on short-term commercial accommodation for the West Coast Regional Tourism Organisation (RTO) area, from the Accommodation Survey. This survey is run by Statistics New Zealand on behalf of the Ministry of Economic Development.

The data relates to the areas covered by the following local authorities:

- Buller District
- Grey District
- Westland 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 Statistics NZ website (www.stats.govt.nz).

The December 2011 monitor will be released on 10 February 2012.



Geoff Bascand
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 Statistics New Zealand, 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 November 2011 compared with November 2010:

- Guest nights down 2.3 percent to 106,629
- International guest nights up 5.0 percent to 65,650
- Domestic guest nights down 12.0 percent to 40,979
- Average length of stay fell from 1.37 nights to 1.30 nights
- Overall occupancy rate fell from 38.8 percent to 38.0 percent
- The occupancy rate, excluding holiday parks, was 43.6 percent in November 2011.
- Accommodation capacity, excluding holiday parks, down 0.2 percent.

Response rates for November 2011

The response rate for the West Coast RTO area was 77 percent for November 2011.

The proportion of the origin-of-guest estimate from actual data was 59 percent.

Figure 1.1

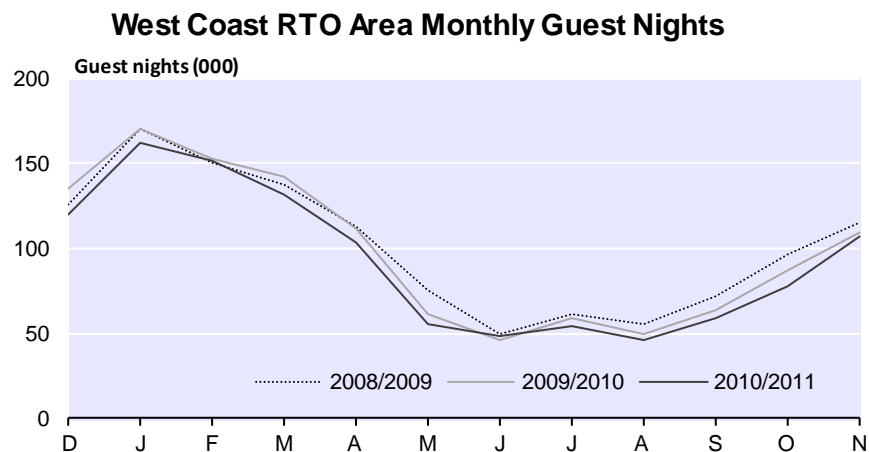
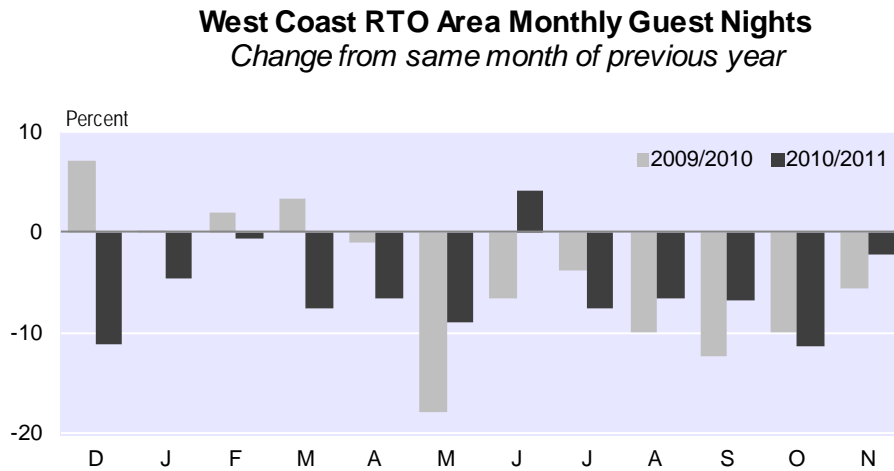


Figure 1.2



Year ended highlights

For the year ended November 2011 compared with the previous year:

- Guest nights down 5.9 percent to 1,119,788
- International guest nights down 6.8 percent to 621,741
- Domestic guest nights down 4.7 percent to 498,047
- Average length of stay down from 1.39 nights to 1.38 nights
- Overall occupancy rate down from 34.5 percent to 33.3 percent
- The occupancy rate, excluding holiday parks, was 39.2 percent for the year ended November 2011.
- Accommodation capacity, excluding holiday parks, down 3.6 percent.

Figure 1.3

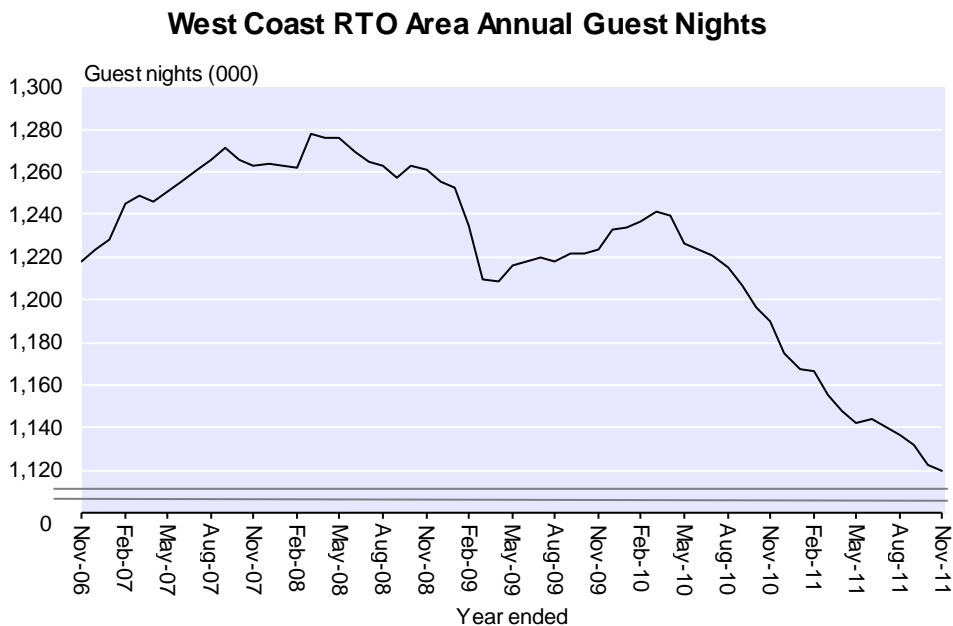
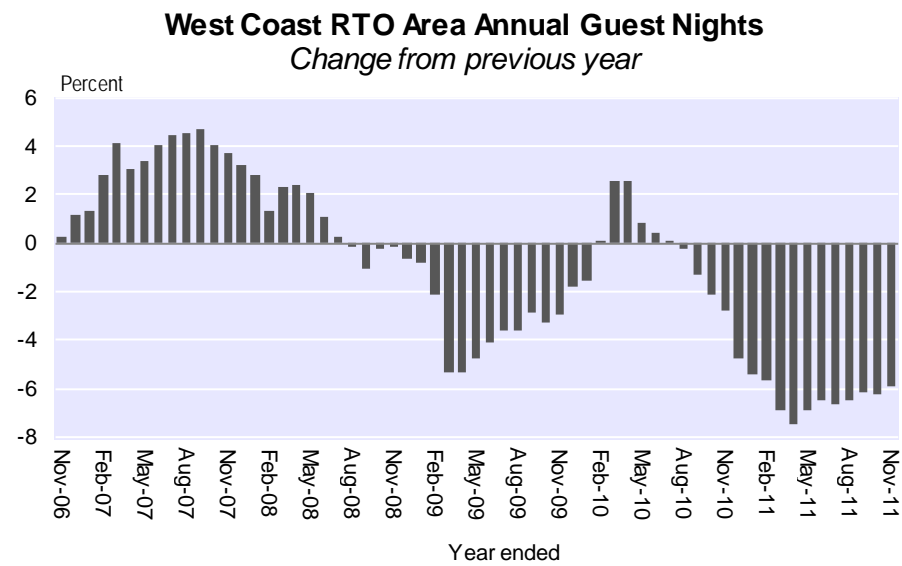


Figure 1.4



2 Accommodation variables

In November 2011, compared with November 2010, there was a decrease of 2.3 percent in total guest nights for the West Coast RTO area. Hotels had the largest decrease, followed by motels. Holiday parks had the largest increase.

For the year ended November 2011, total guest nights for the West Coast RTO area decreased 5.9 percent. Hotels had the largest decrease, followed by motels.

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

Table 2.1

West Coast Accommodation Variables*By accommodation type
Monthly and year ended*

Accommodation type	Monthly			Annual ⁽¹⁾		
	November		Percentage change	Year ended		Percentage change
	2010	2011		November 2010	November 2011	
Guest nights						
Total guest nights	109,087	106,629	-2.3	1,190,167	1,119,788	-5.9
International	62,504	65,650	5.0	667,286	621,741	-6.8
Domestic	46,582	40,979	-12.0	522,881	498,047	-4.7
Hotels	27,374	23,251	-15.1	275,782	239,049	-13.3
Motels/apartments	36,107	32,623	-9.6	376,836	352,819	-6.4
Backpackers	24,935	25,914	3.9	283,561	280,384	-1.1
Holiday parks	20,670	24,841	20.2	253,988	247,536	-2.5
Occupancy rates⁽²⁾ (%)						
Hotels	43.2	36.5	-15.6	34.2	32.7	-4.3
Motels/apartments	58.6	53.7	-8.4	47.4	46.5	-1.9
Backpackers	41.6	43.0	3.5	39.8	39.7	-0.2
Holiday parks	20.1	24.7	22.8	21.2	19.5	-7.9
Total	38.8	38.0	-2.0	34.5	33.3	-3.7
Total excluding holiday parks ⁽³⁾	46.6	43.6	-6.4	39.9	39.2	-1.7
Average length of stay⁽⁴⁾						
Hotels	1.26	1.18	-6.3	1.33	1.27	-4.0
Motels/apartments	1.42	1.39	-2.3	1.40	1.44	2.8
Backpackers	1.38	1.40	1.1	1.44	1.46	1.4
Holiday parks	1.41	1.23	-12.9	1.41	1.34	-5.1
Total	1.37	1.30	-4.8	1.39	1.38	-0.8
Guest arrivals						
Hotels	21,762	19,727	-9.4	207,787	187,640	-9.7
Motels/apartments	25,370	23,463	-7.5	268,743	244,702	-8.9
Backpackers	18,020	18,522	2.8	196,908	192,049	-2.5
Holiday parks	14,684	20,252	37.9	180,501	185,306	2.7
Total	79,836	81,964	2.7	853,939	809,697	-5.2
Establishments						
Hotels	39	39	0.0	39	39	0.0
Motels/apartments	76	75	-1.3	76	75	-1.3
Backpackers	27	26	-3.7	27	26	-3.7
Holiday parks	19	18	-5.3	19	18	-5.3
Total	161	158	-1.9	161	158	-1.9
Capacity						
Hotels	39,840	40,200	0.9	486,533	452,866	-6.9
Motels/apartments	31,920	31,410	-1.6	383,411	371,990	-3.0
Backpackers	49,350	49,290	-0.1	588,379	581,645	-1.1
Holiday parks	50,970	51,150	0.4	584,602	608,102	4.0
Total	172,080	172,050	0.0	2,042,925	2,014,603	-1.4

(1) Comparing equivalent periods a year apart needs to be done 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).

(2) Occupancy rates are calculated as the ratio of stay unit nights to monthly capacity.

(3) Occupancy rates excluding holiday parks are included because the capacity of holiday parks can distort total occupancy rates.

(4) Average length of stay is the ratio of guest nights to guest arrivals.

Symbol:

C confidential

3 Origin of guests

In November 2011, international guests accounted for 61.6 percent of all guest nights in the West Coast RTO area. When compared with November 2010, the number of international guest nights spent in the area in November 2011 was up 5.0 percent to 65,650. Domestic guest nights decreased 12.0 percent, to 40,979, for the same period. The proportion of the origin-of-guest estimate from actual data was 59 percent for November 2011.

Figure 3.1

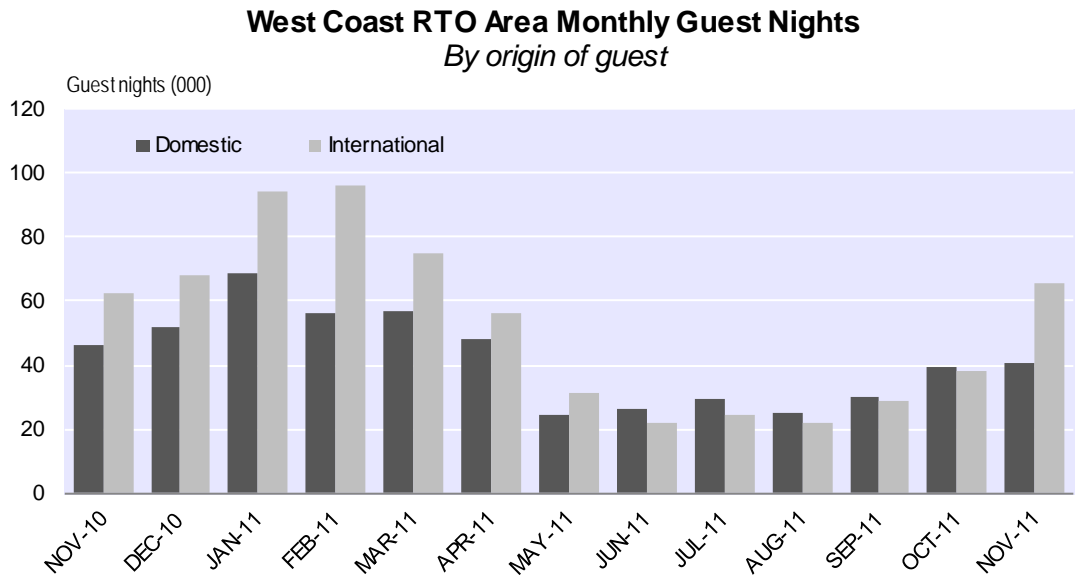


Table 3.1

West Coast and New Zealand Monthly Guest Nights*By origin of guest*

		West Coast RTO ⁽¹⁾ area			New Zealand		
		Origin of guest		Total	Origin of guest		Total
		Domestic	International		Domestic	International	
Month							
2010	Nov	46,582	62,504	109,087	1,466,386	1,236,398	2,702,784
	Dec	52,188	68,214	120,402	1,797,084	1,368,180	3,165,264
2011	Jan	68,411	94,130	162,541	2,647,050	1,687,824	4,334,874
	Feb	56,299	95,888	152,187	1,659,582	1,615,866	3,275,448
	Mar	56,610	74,679	131,289	1,730,299	1,365,572	3,095,870
	Apr	48,106	56,095	104,201	1,697,699	1,017,627	2,715,326
	May	24,784	31,234	56,018	1,211,222	686,952	1,898,174
	Jun	26,474	22,155	48,629	1,165,864	570,485	1,736,350
	Jul	29,717	24,528	54,245	1,497,887	761,243	2,259,131
	Aug	24,878	21,856	46,734	1,414,824	780,534	2,195,358
	Sep	30,185	29,114	59,299	1,210,770	978,572	2,189,342
	Oct	39,417	38,197	77,614	1,459,450	985,966	2,445,416
	Nov	40,979	65,650	106,629	1,467,037	1,195,565	2,662,602
		Percent change from the current month of the previous year					
		-12.0	5.0	-2.3	0.0	-3.3	-1.5
Year ended							
	November 2010	522,881	667,286	1,190,167	18,823,946	13,499,342	32,323,288
	November 2011	498,047	621,741	1,119,788	18,958,768	13,014,386	31,973,154
		Percent change from previous year					
		-4.7	-6.8	-5.9	0.7	-3.6	-1.1

(1) Regional tourism organisation

4 National results

In November 2011, a total of 2,663,000 guest nights were spent in short-term commercial accommodation in New Zealand, a decrease of 40,000 nights (1.5 percent) from November 2010.

Two of the four accommodation types recorded a decrease in guest nights in November 2011 when compared with November 2010.

Hotels had the largest decrease in guest nights (down 91,000 or 8.8 percent), followed by backpacker accommodation (down 29,000 or 7.1 percent). Motels had the largest increase in guest nights (up 49,000 or 5.8 percent), followed by holiday parks (up 31,000 or 7.3 percent).

For the year ended November 2011, there were 31,973,000 guest nights, a decrease of 350,000 (1.1 percent) from the previous November year.

Refer to Table 4.1 for comparisons of data.

Table 4.1

West Coast and New Zealand Guest Nights

*By accommodation type
Monthly and year ended*

Accommodation type	Total guest nights			Percentage change	
	2009	2010	2011	2009 to 2010	2010 to 2011
November month					
West Coast RTO area					
Hotels	26,587	27,374	23,251	3.0	-15.1
Motels	35,825	36,107	32,623	0.8	-9.6
Backpackers	27,463	24,935	25,914	-9.2	3.9
Holiday parks	25,768	20,670	24,841	-19.8	20.2
Total	115,642	109,087	106,629	-5.7	-2.3
New Zealand					
Hotels	965,950	1,030,592	939,772	6.7	-8.8
Motels	841,348	835,850	884,557	-0.7	5.8
Backpackers	411,724	413,411	384,258	0.4	-7.1
Holiday parks	431,393	422,931	454,016	-2.0	7.3
Total	2,650,414	2,702,784	2,662,602	2.0	-1.5
Year ended November					
West Coast RTO area					
Hotels	279,589	275,782	239,049	-1.4	-13.3
Motels	442,461	376,836	352,819	-14.8	-6.4
Backpackers	221,866	283,561	280,384	27.8	-1.1
Holiday parks	280,067	253,988	247,536	-9.3	-2.5
Total	1,223,983	1,190,167	1,119,788	-2.8	-5.9
New Zealand					
Hotels	10,558,838	11,206,885	10,691,317	6.1	-4.6
Motels	10,309,994	10,196,841	10,367,228	-1.1	1.7
Backpackers	4,613,956	4,553,332	4,463,504	-1.3	-2.0
Holiday parks	6,393,587	6,366,230	6,451,104	-0.4	1.3
Total	31,876,374	32,323,288	31,973,154	1.4	-1.1

5 Regional comparison

In November 2011, Canterbury recorded the largest decrease in guest nights (down 91,000 or 25.3 percent) from November 2010. This was followed by Mackenzie (down 11,000 or 21.7 percent), Auckland (down 10,000 or 1.8 percent), Fiordland (down 4,000 or 8.7 percent), and Taranaki (down 4,000 or 7.9 percent).

Wellington recorded the largest increase (up 16,000 or 8.1 percent), followed by Queenstown (up 9,000 or 5.0 percent), Dunedin (up 9,000 or 13.3 percent), Timaru (up 8,000 or 42.1 percent), and Wanaka (up 6,000 or 15.6 percent).

Table 5.1

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

RTO area	November guest nights								
	Domestic			International			Total		
	2010	2011	Percent- age change	2010	2011	Percent- age change	2010	2011	Percent- age change
Northland	56,477	66,914	18.5	61,830	56,333	-8.9	118,307	123,248	4.2
Auckland	300,797	264,561	-12.0	245,053	271,487	10.8	545,849	536,047	-1.8
Coromandel	24,966	27,220	9.0	23,942	27,556	15.1	48,908	54,776	12.0
Waikato	69,252	70,560	1.9	24,925	21,383	-14.2	94,177	91,943	-2.4
Bay of Plenty	57,078	59,158	3.6	20,679	22,777	10.1	77,757	81,935	5.4
Rotorua	60,519	77,093	27.4	84,715	70,719	-16.5	145,234	147,812	1.8
Taupo	51,029	51,278	0.5	23,908	28,112	17.6	74,937	79,390	5.9
Whakatane- Kaw erau	10,198	9,719	-4.7	2,813	2,744	-2.5	13,011	12,463	-4.2
Gisborne	19,907	19,779	-0.6	5,472	5,190	-5.1	25,379	24,969	-1.6
Taranaki	40,226	35,990	-10.5	6,727	7,231	7.5	46,953	43,221	-7.9
Haw ke's Bay	52,926	52,222	-1.3	23,360	25,427	8.8	76,286	77,649	1.8
Ruapehu	12,644	13,938	10.2	14,138	13,788	-2.5	26,782	27,726	3.5
Manaw atu	33,569	33,623	0.2	3,706	4,215	13.7	37,275	37,837	1.5
Wanganui	10,502	9,563	-8.9	3,891	3,290	-15.4	14,393	12,853	-10.7
Wairarapa	12,114	14,284	17.9	1,994	2,396	20.2	14,108	16,680	18.2
Kapiti-Horow henua	12,651	13,641	7.8	2,107	2,294	8.9	14,758	15,936	8.0
Wellington	126,146	113,715	-9.9	72,685	101,154	39.2	198,831	214,869	8.1
Marlborough	25,991	27,082	4.2	30,906	30,507	-1.3	56,897	57,588	1.2
Nelson-Tasman	45,412	50,674	11.6	42,908	40,395	-5.9	88,320	91,069	3.1
Canterbury	184,674	160,713	-13.0	176,332	108,869	-38.3	361,006	269,582	-25.3
Hurunui	15,686	18,992	21.1	8,354	8,962	7.3	24,040	27,953	16.3
Mackenzie	17,435	17,031	-2.3	31,958	21,665	-32.2	49,393	38,695	-21.7
Timaru	14,263	20,753	45.5	4,895	6,476	32.3	19,157	27,229	42.1
West Coast	46,582	40,979	-12.0	62,504	65,650	5.0	109,087	106,629	-2.3
Wanaka	14,011	16,034	14.4	24,251	28,182	16.2	38,262	44,216	15.6
Queenstow n	49,942	68,232	36.6	134,731	125,745	-6.7	184,673	193,977	5.0
Waitaki	16,900	16,447	-2.7	7,543	7,788	3.2	24,443	24,235	-0.9
Central Otago	13,656	14,009	2.6	4,420	4,199	-5.0	18,076	18,207	0.7
Dunedin	35,302	42,970	21.7	34,782	36,408	4.7	70,084	79,379	13.3
Clutha	3,389	4,736	39.7	2,620	2,720	3.8	6,009	7,456	24.1
Fiordland	9,142	12,223	33.7	35,060	28,154	-19.7	44,201	40,377	-8.7
Southland	23,001	22,907	-0.4	13,193	13,751	4.2	36,194	36,658	1.3
Total	1,466,386	1,467,037	0.0	1,236,398	1,195,565	-3.3	2,702,784	2,662,602	-1.5

Table 5.2

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

RTO area	November 2011 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks ⁽²⁾
	Percent					
Northland	43.1	48.2	41.5	9.3	23.9	44.6
Auckland	76.6	57.5	59.9	15.9	60.7	68.4
Coromandel	27.1	44.1	33.0	15.9	23.5	37.1
Waikato	54.1	57.2	31.6	13.3	36.5	51.5
Bay of Plenty	56.0	57.6	36.1	16.6	31.3	49.2
Rotorua	70.2	56.2	43.2	22.7	47.9	58.9
Taupo	52.5	50.0	48.0	13.6	38.0	49.7
Whakatane-Kawerau	C	59.2	C	5.5	15.8	47.2
Gisborne	C	54.2	C	6.5	17.9	44.3
Taranaki	51.7	58.0	22.9	10.4	32.2	47.4
Hawke's Bay	58.6	49.9	45.2	13.5	34.8	50.1
Ruapehu	42.3	21.0	22.3	18.4	25.2	26.7
Manawatu	41.7	49.6	C	C	34.0	C
Wanganui	C	40.1	31.3	C	25.0	C
Wairarapa	39.1	56.0	C	C	23.9	C
Kapiti-Horowhenua	C	48.5	C	8.3	19.6	33.0
Wellington	81.9	65.1	C	C	68.9	C
Marlborough	46.8	49.7	43.3	18.0	34.7	46.3
Nelson-Tasman	50.5	51.4	42.9	11.5	26.9	47.8
Canterbury	69.0	79.6	42.5	21.0	47.7	64.5
Hurunui	C	48.5	21.2	C	29.1	C
Mackenzie	C	68.2	C	25.0	40.5	47.6
Timaru	41.4	76.9	C	C	34.4	C
West Coast	36.5	53.7	43.0	24.7	38.0	43.6
Wanaka	35.7	47.9	35.5	11.8	25.5	39.3
Queenstown	63.0	46.8	53.1	22.4	51.3	56.8
Waitaki	33.9	57.5	35.0	2.9	10.1	42.0
Central Otago	20.4	50.2	23.9	4.6	11.6	32.6
Dunedin	70.0	75.4	47.6	31.9	59.7	67.2
Clutha	34.8	47.4	13.2	12.7	21.4	29.1
Fiordland	34.8	42.3	48.9	17.1	32.1	42.3
Southland	50.7	61.3	27.4	12.1	37.6	48.0
Total	62.9	56.1	43.9	13.6	39.1	54.9

(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 West Coast RTO area.

Table 6.1

Local Authority and West Coast Accommodation Results⁽¹⁾

Accommodation type	November 2011 results				
	Establish-ments	Capacity	Guest Nights	Average stay length	Occupancy rate
	Number			Days	Percent
Buller District					
Hotels	12	6,330	3,994	1.30	39.54
Motels	21	6,090	6,017	1.47	57.97
Backpackers	8	10,230	C	C	C
Holiday parks	5	16,500	C	C	C
Total	46	39,150	19,637	1.38	29.96
Grey District					
Hotels	10	9,150	7,070	1.45	51.88
Motels	16	5,940	5,752	1.55	55.32
Backpackers	9	10,560	C	C	C
Holiday parks	3	8,850	C	C	C
Total	38	34,500	23,549	1.37	44.80
Westland District					
Hotels	17	24,720	12,187	1.03	29.95
Motels	38	19,380	20,854	1.33	51.91
Backpackers	9	28,500	18,033	1.45	51.02
Holiday parks	10	25,800	12,368	1.17	23.92
Total	74	98,400	63,443	1.26	38.80
West Coast Regional Tourism Organisation area					
Hotels	39	40,200	23,251	1.18	36.45
Motels	75	31,410	32,623	1.39	53.73
Backpackers	26	49,290	25,914	1.40	43.04
Holiday parks	18	51,150	24,841	1.23	24.67
Total	158	172,050	106,629	1.30	37.99

(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

Population

The target population for the Accommodation Survey is all 'geographic units' (called 'establishments' in this publication) that are classified as short-term (less than one month) commercial accommodation providers operating in New Zealand. In terms of the Australian and New Zealand Standard Industrial Classification 2006 (ANZSIC06), the target population is taken from class 4400 (accommodation), and the part of class 4520 (pubs, taverns, and bars) that also provides accommodation.

The survey frame is all short-term commercial accommodation-providing geographic units belonging to an economically significant enterprise. Economic significance is generally determined as being GST registered and having a turnover of at least \$30,000 per year. Any geographic unit classified as a hosted accommodation type is excluded from the survey.

Confidentiality and suppression

Data collected and information contained in this report must conform to the provisions of the Statistics Act 1975. This requires that published information maintains the confidentiality of respondents. Cell suppression has been used to prevent the disclosure of sensitive information and is represented by a 'C' in the tables.

Rounding is applied to produce 'confidentialised' data. The rounding to 'origin of guest' data means that subtotals may not add up to the totals shown.

Some data have been suppressed due to low response rates. These are represented by 'S' in the tables.

Data reliability

This survey aims for 100 percent coverage of the population (a full census). However, in practice an overall response rate of between 76 and 80 percent is usually achieved. The remaining units are given imputed values based on the characteristics of similar establishments in the same or similar regions. Imputation 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 occur for reasons such as respondent error, frame quality, and errors in processing. While every effort is made to minimise these errors, they will still occur. It is not possible to quantify their effect.

Comparison with other statistical sources

Care should be used when comparing statistics from the Accommodation Survey with other sources. The target populations and methodologies may not be comparable. For example, 'average length of stay' figures from the Accommodation Survey combine international and domestic guests, whereas the average length of stay figures published from the International Visitor Survey cover only international guests.

Classifications and definitions

Accommodation type is determined by the type that contributes the majority of an establishment's capacity. For instance, if a business provides both motel and camping ground accommodation, but the majority of its stay units are motel rooms, then it would be classified as a motel. The classification system used is the New Zealand Accommodation Classification, broadly defined below:

- Hotels: includes both hotels and resorts
- Motels: includes motor inns, apartments, and motels
- Backpackers/hostels
- Caravan parks/camping grounds.

Further information is available on the Tourism Research website, www.tourismresearch.govt.nz or on request from Statistics New Zealand.

For definitions of other terms, please search for 'survey participants accommodation survey' on the Statistics NZ website (www.stats.govt.nz).