



# **New Zealand Hotel Key Performance & Investment Update**

Hotel Property Forum

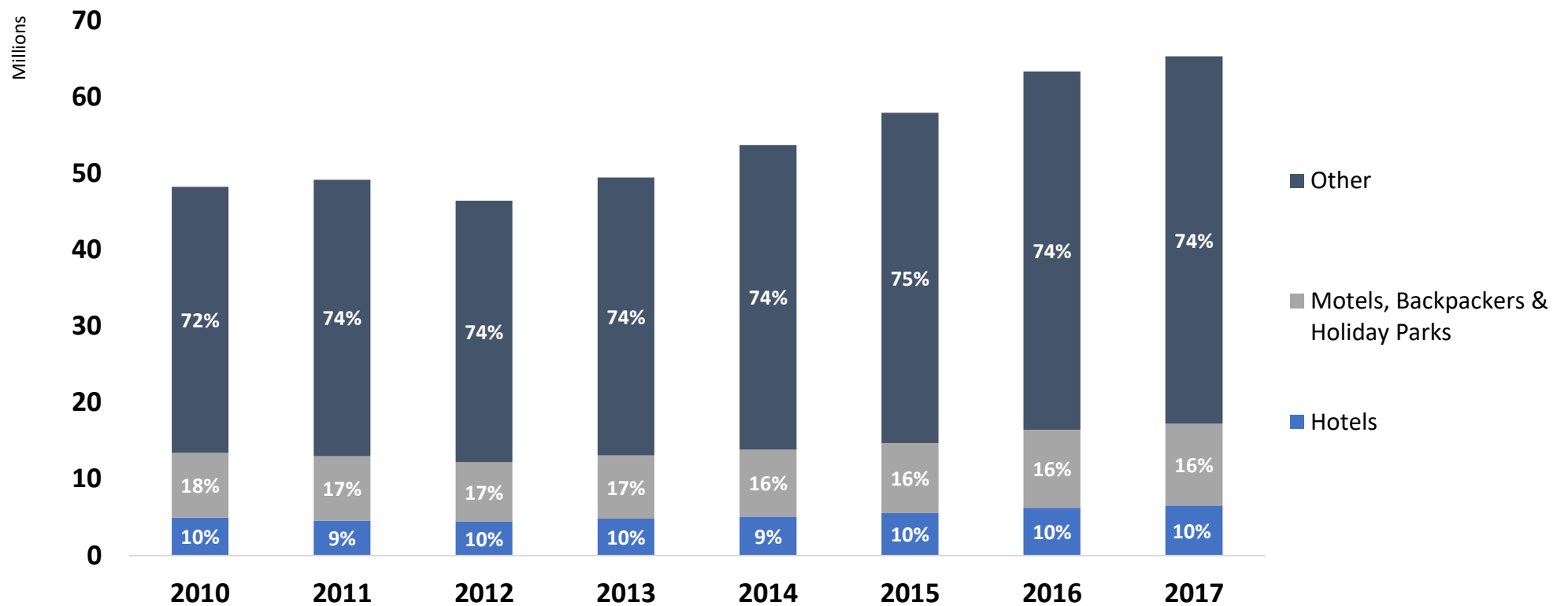
4 July 2018

## Areas of Discussion

- **Visitor Night Growth in New Zealand**
  - by Accommodation Type
  - by Region
  - by Accommodation Type and Region
  
- **Airbnb**

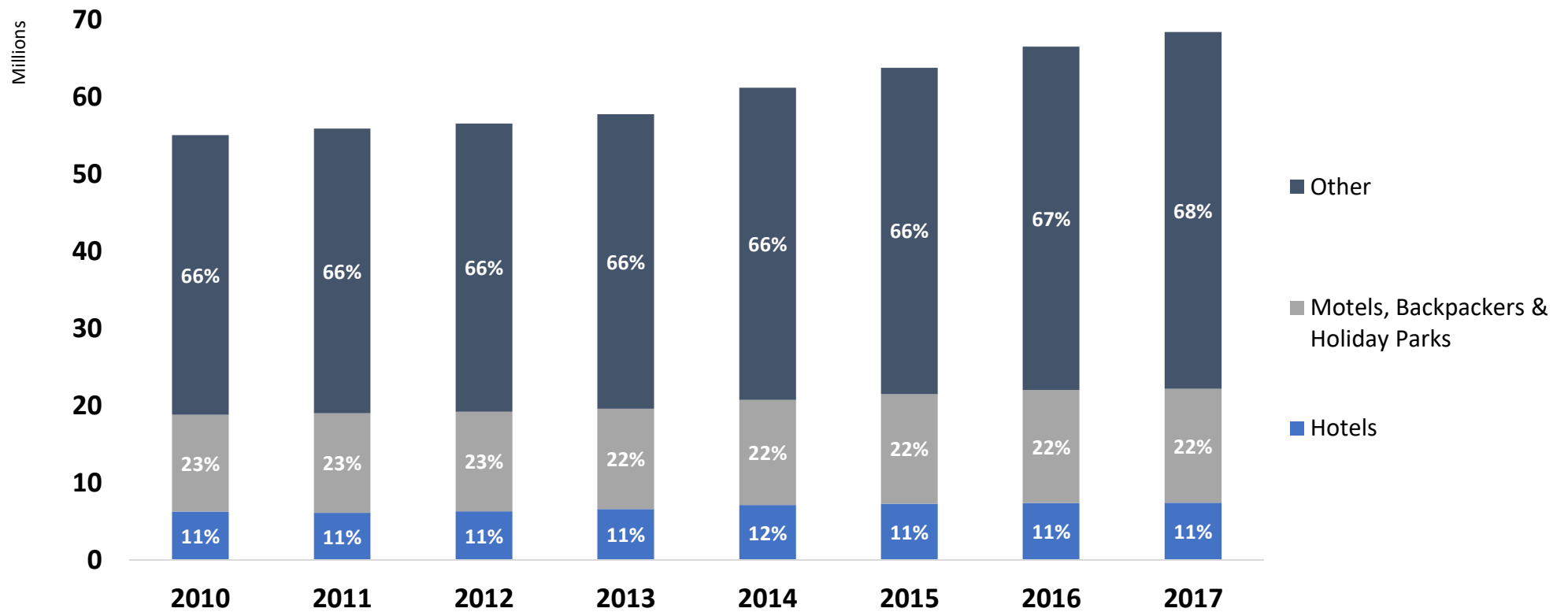


## International Visitor Nights in New Zealand by Accommodation Type



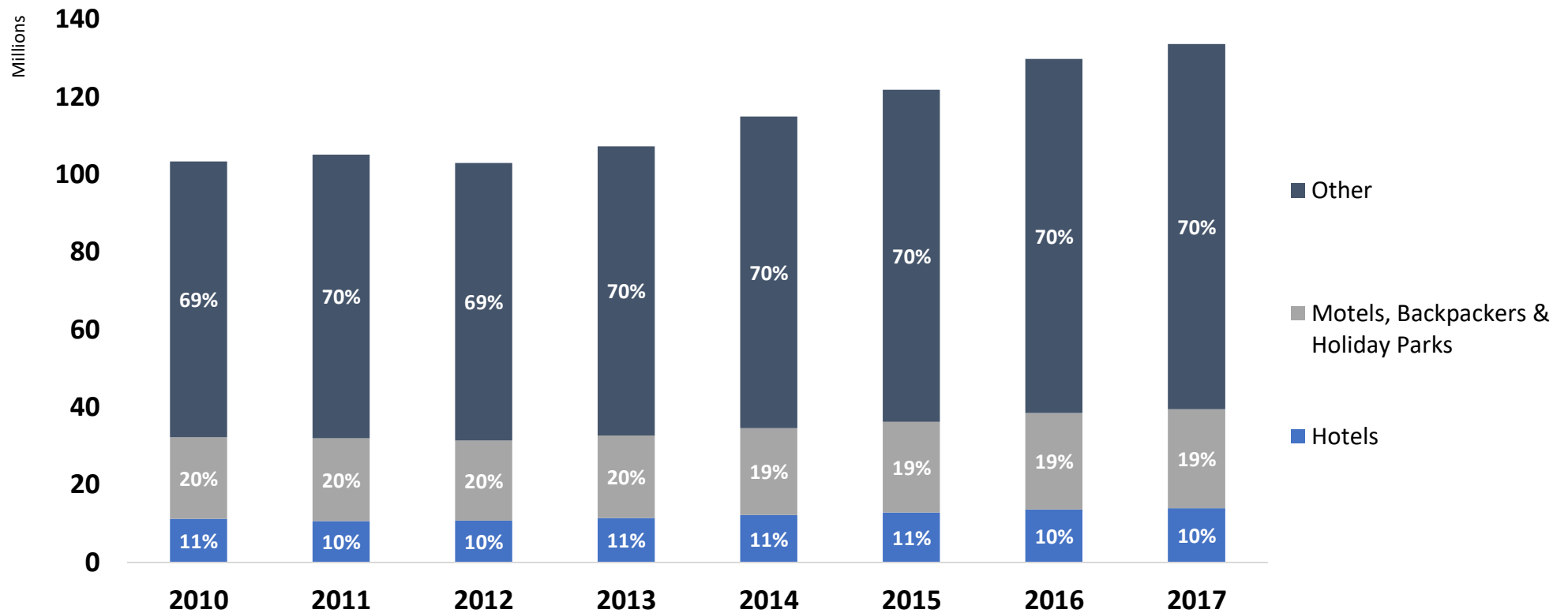
(Source: Stats NZ)

## Domestic Visitor Nights in New Zealand by Accommodation Type



(Source: Stats NZ, Horwath HTL estimates)

## Total Visitor Nights in New Zealand by Accommodation Type



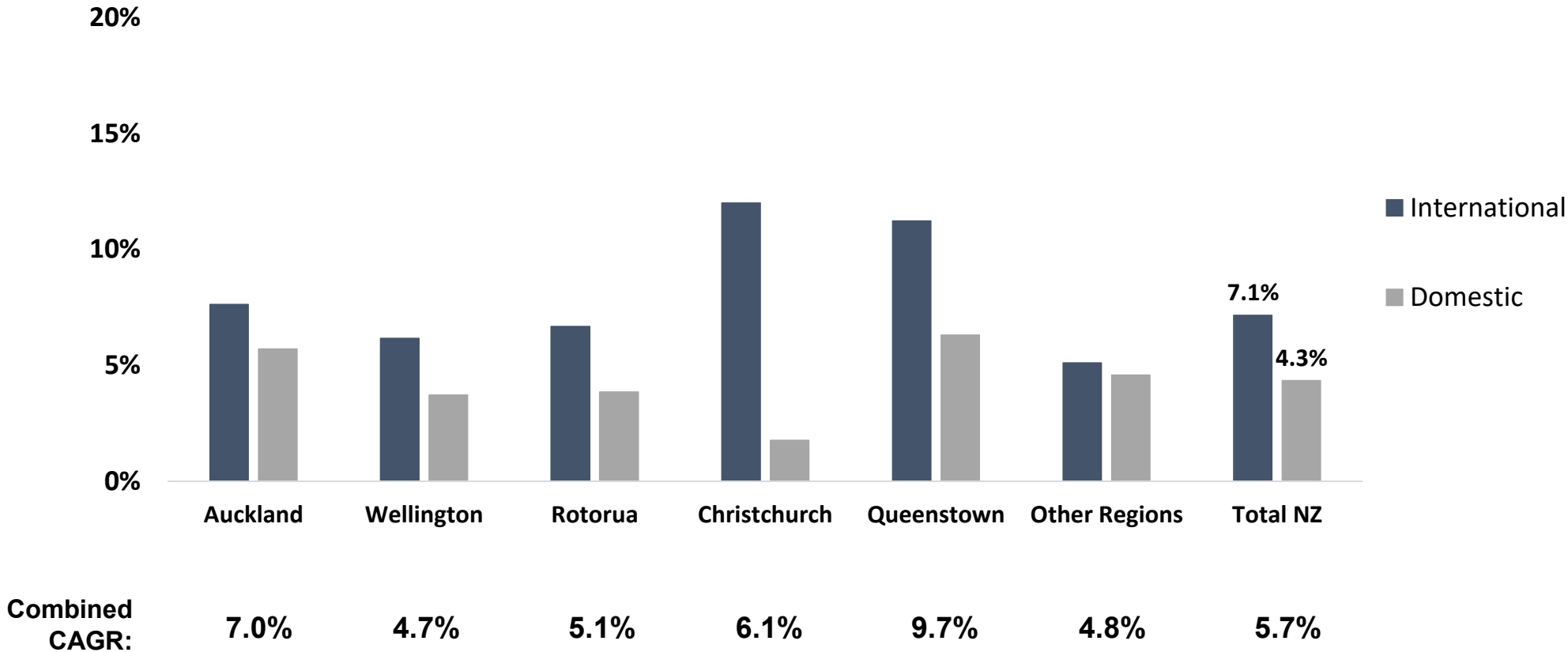
(Source: Stats NZ, Horwath HTL estimates)

## Growth in **Total** Visitor Nights in New Zealand (CAGR 2013 – 2017)

	<b>International</b>	<b>Domestic</b>	<b>Total</b>
<b>All Accommodation</b>	<b>7.1%</b>	<b>4.3%</b>	<b>5.7%</b>
<b>Commercial Accommodation</b>	<b>7.1%</b>	<b>3.2%</b>	<b>4.8%</b>
<b>Hotels only</b>	<b>7.9%</b>	<b>2.9%</b>	<b>5.1%</b>

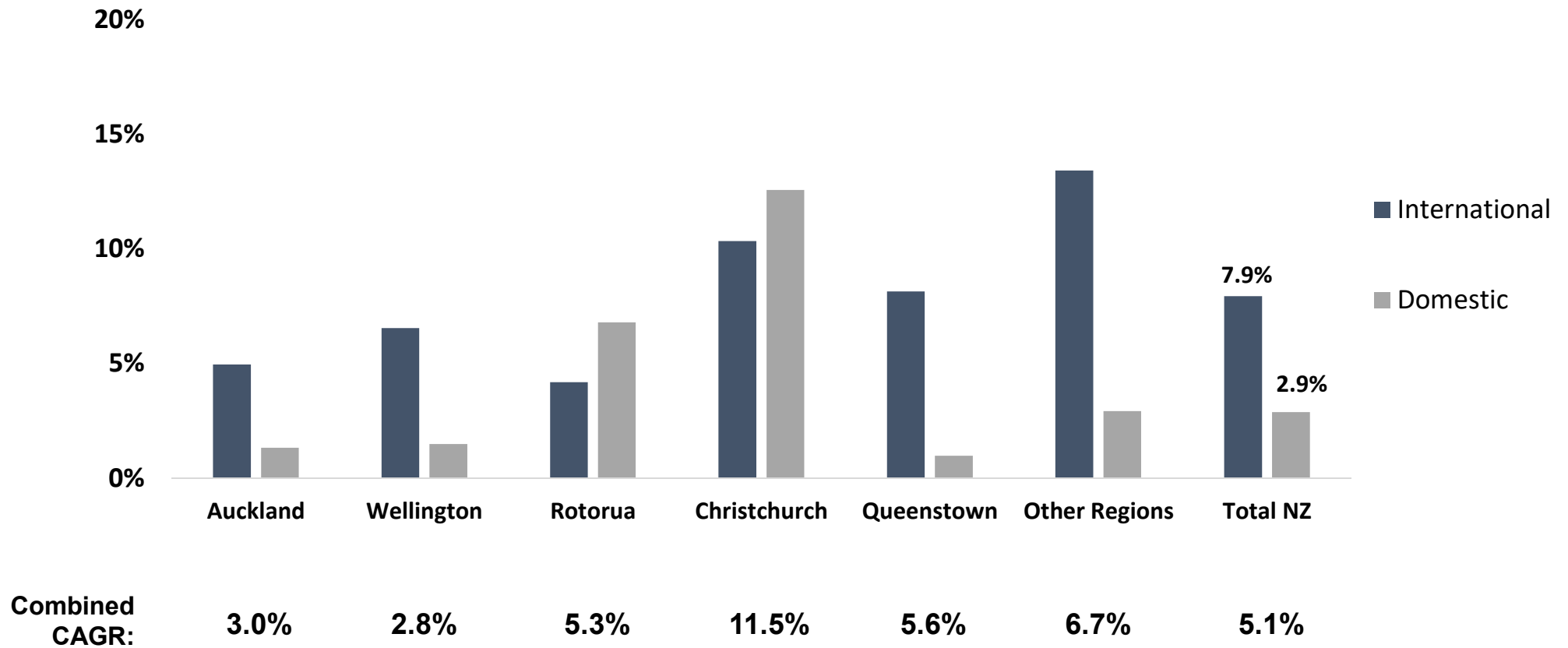
(Source: Stats NZ, CAM, Horwath HTL estimates)

# Growth in **Total** Visitor Nights by Region – Main Centres (CAGR 2013 – 2017)



(Source: Horwath HTL estimates)

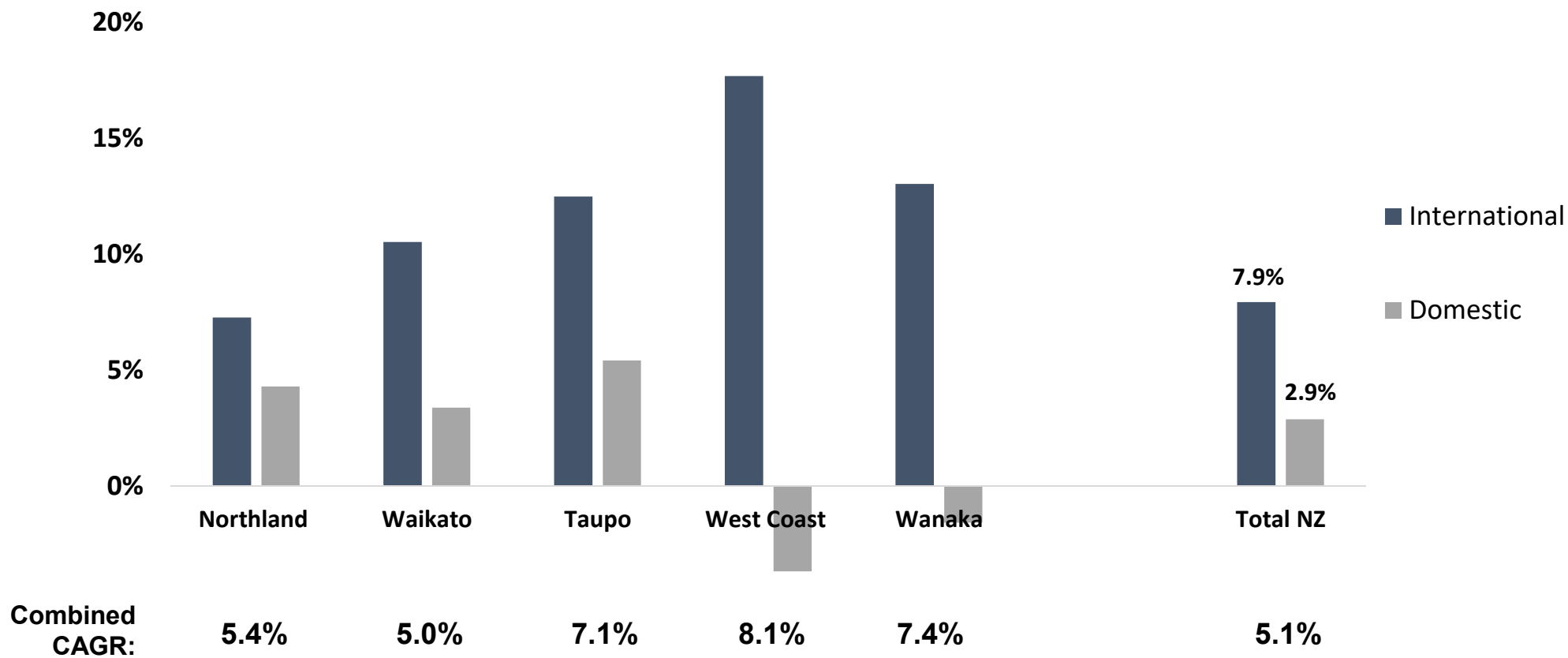
## Growth in **Hotel** Guest Nights by Region – Main Centres (CAGR 2013 – 2017)



(Source: Stats NZ)

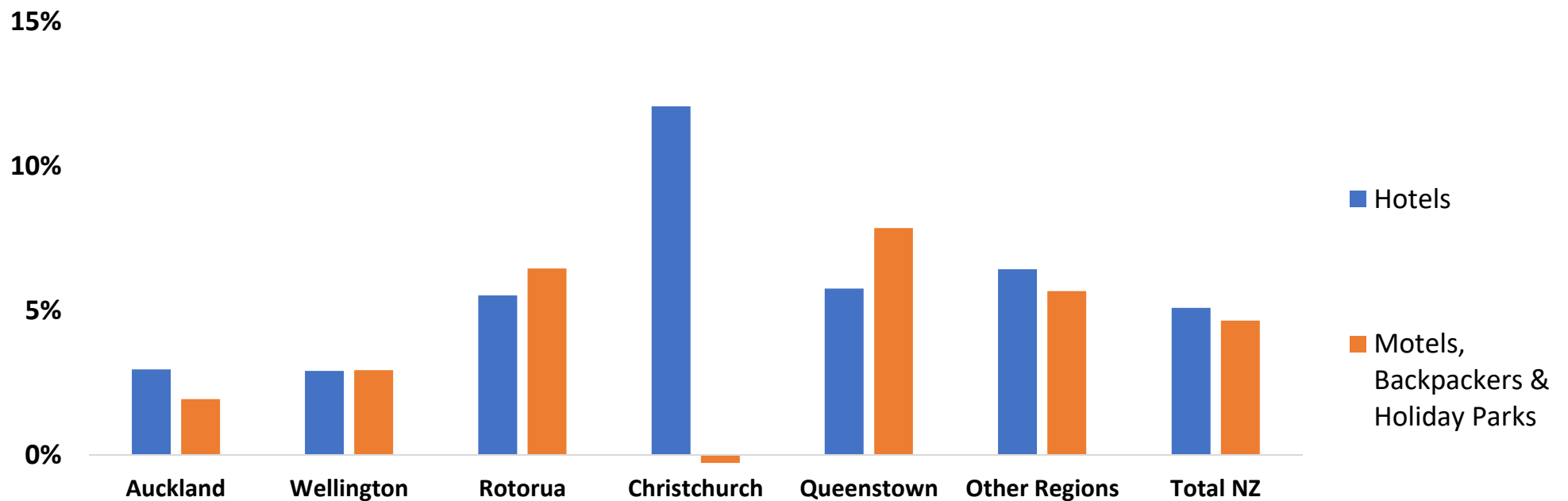


## Growth in **Hotel** Guest Nights by Region – Other Regions (CAGR 2013 – 2017)



(Source: Stats NZ)

## Growth in Hotel vs Other Commercial Accommodation Guest Nights by Region (CAGR 2013 – 2017)

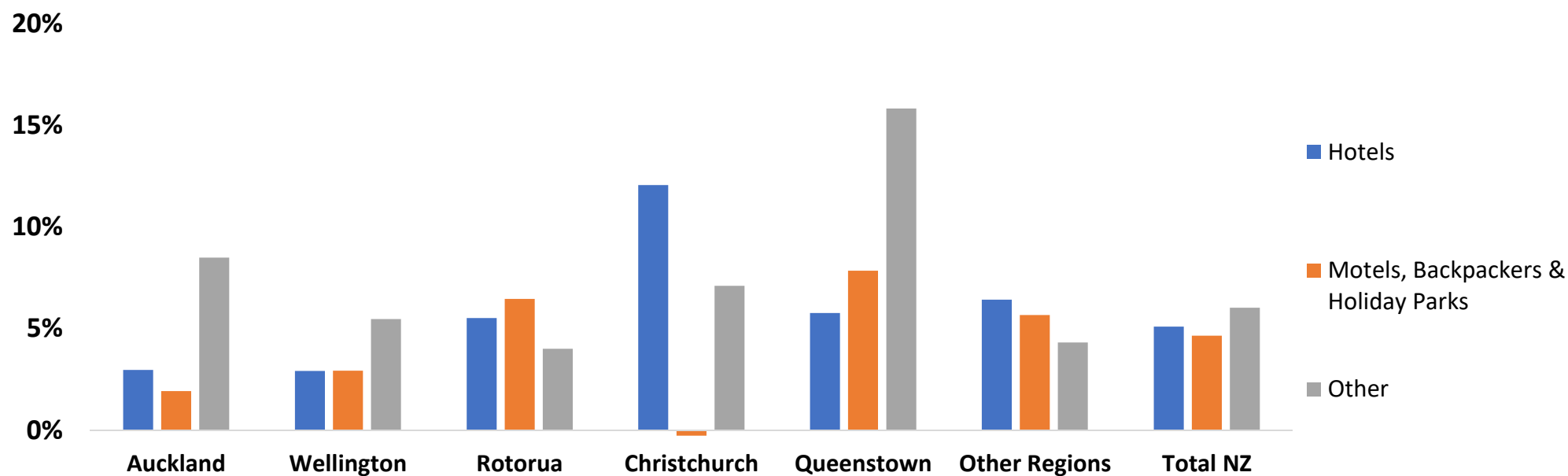


Hotels: 3.0% 2.9% 5.5% 12.1% 5.8% 6.4% 5.1%

Motels, Backpackers & Holiday Parks : 1.9% 2.9% 6.5% -0.3% 7.8% 5.7% 4.6%

(Source: CAM)

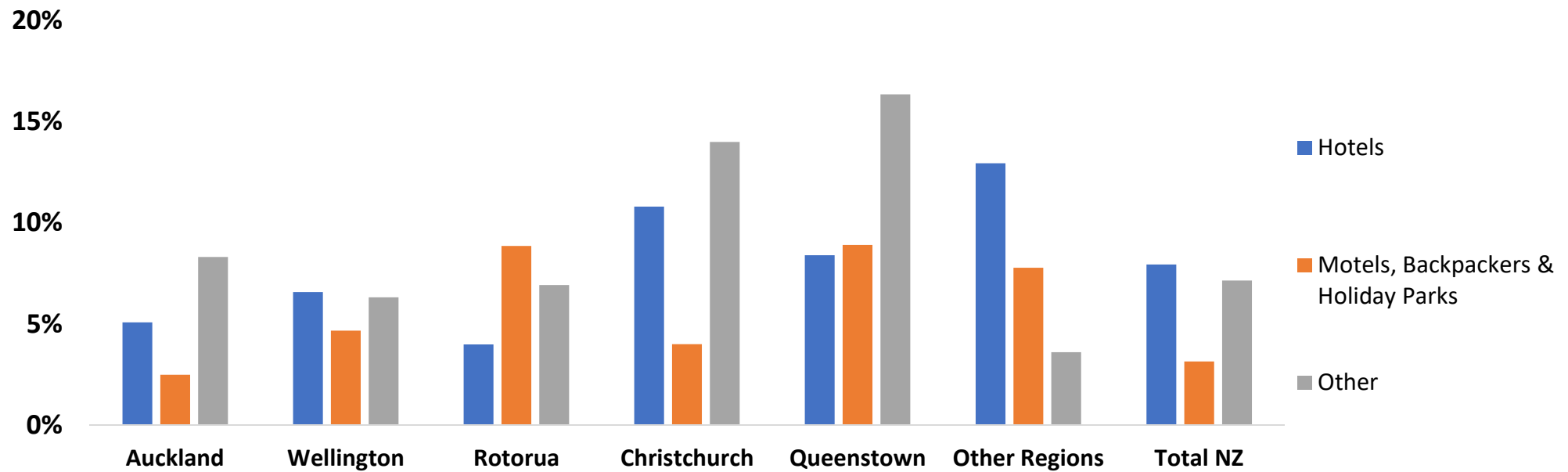
## Hotel, Other Commercial Accommodation & Other Visitor Night Growth by Region (CAGR 2013 – 2017) Total



	Auckland	Wellington	Rotorua	Christchurch	Queenstown	Other Regions	Total NZ
<b>Hotels:</b>	<b>3.0%</b>	<b>2.9%</b>	<b>5.5%</b>	<b>12.1%</b>	<b>5.8%</b>	<b>6.4%</b>	<b>5.1%</b>
<b>Motels, Backpackers &amp; Holiday Parks:</b>	<b>1.9%</b>	<b>2.9%</b>	<b>6.5%</b>	<b>-0.3%</b>	<b>7.8%</b>	<b>5.7%</b>	<b>4.6%</b>
<b>Other:</b>	<b>8.5%</b>	<b>5.5%</b>	<b>4.0%</b>	<b>7.1%</b>	<b>15.8%</b>	<b>4.3%</b>	<b>6.1%</b>

(Source: CAM, Horwath HTL estimates)

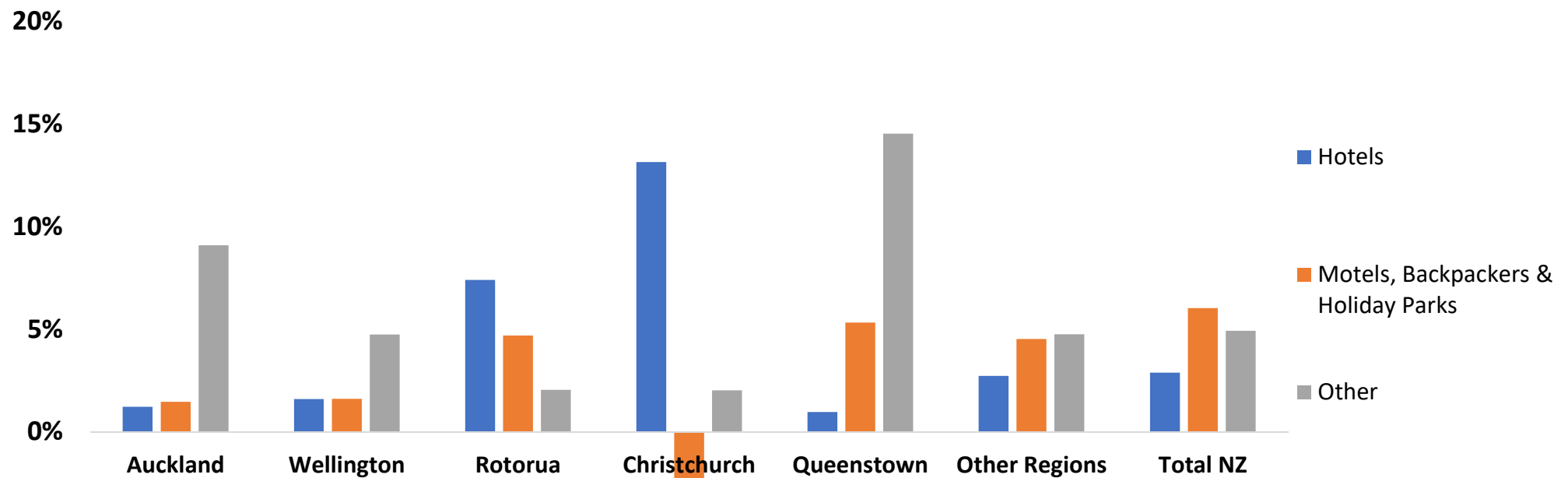
## Hotel, Other Commercial Accommodation & Other Visitor Night Growth by Region (CAGR 2013 – 2017) International



	Auckland	Wellington	Rotorua	Christchurch	Queenstown	Other Regions	Total NZ
<b>Hotels:</b>	<b>5.1%</b>	<b>6.6%</b>	<b>4.0%</b>	<b>10.8%</b>	<b>8.4%</b>	<b>12.9%</b>	<b>7.9%</b>
<b>Motels, Backpackers &amp; Holiday Parks:</b>	<b>2.5%</b>	<b>4.7%</b>	<b>8.9%</b>	<b>4.0%</b>	<b>8.9%</b>	<b>7.8%</b>	<b>3.1%</b>
<b>Other:</b>	<b>8.3%</b>	<b>6.3%</b>	<b>6.9%</b>	<b>14.0%</b>	<b>16.3%</b>	<b>3.6%</b>	<b>7.1%</b>

(Source: CAM, Horwath HTL estimates)

## Hotel, Other Commercial Accommodation & Other Visitor Night Growth by Region (CAGR 2013 – 2017) Domestic

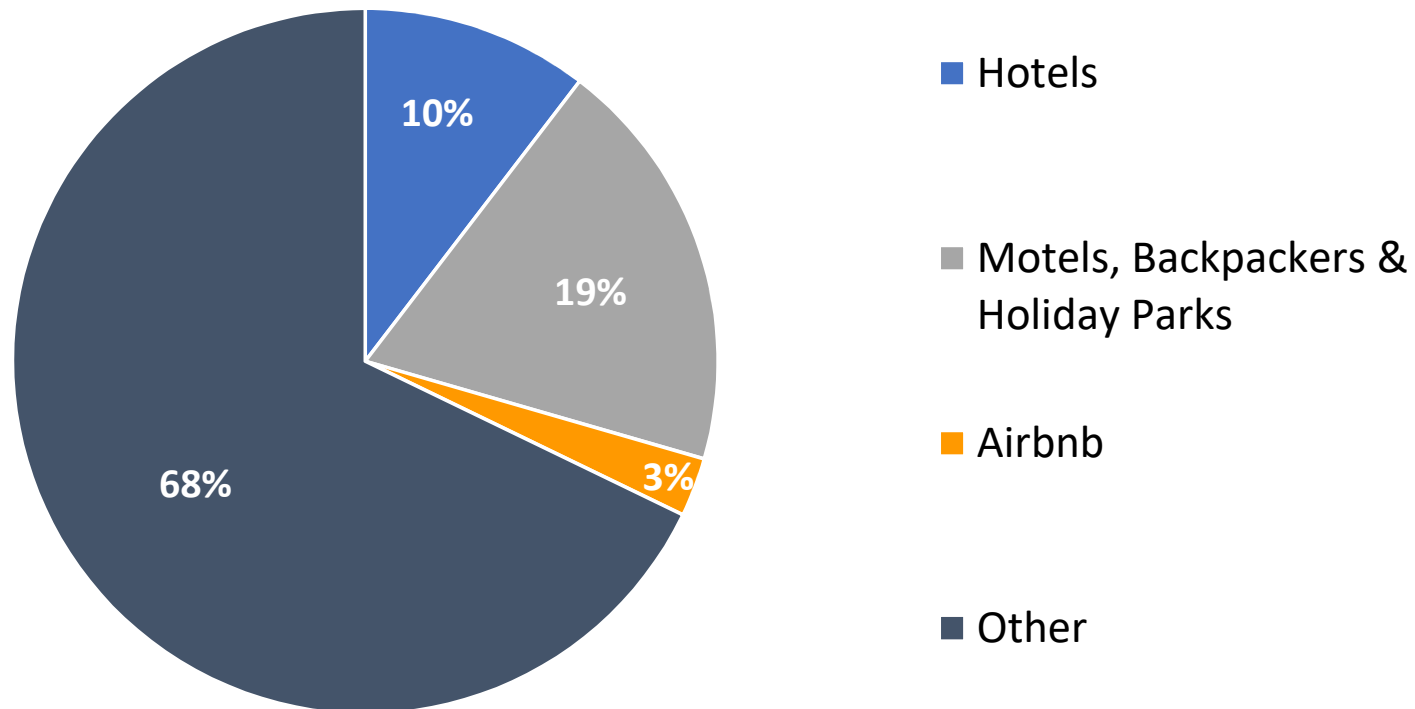


	Auckland	Wellington	Rotorua	Christchurch	Queenstown	Other Regions	Total NZ
<b>Hotels:</b>	<b>1.2%</b>	<b>1.6%</b>	<b>7.4%</b>	<b>13.1%</b>	<b>1.0%</b>	<b>2.7%</b>	<b>2.8%</b>
<b>Motels, Backpackers &amp; Holiday Parks:</b>	<b>1.4%</b>	<b>1.6%</b>	<b>4.7%</b>	<b>-3.3%</b>	<b>5.3%</b>	<b>4.5%</b>	<b>6.0%</b>
<b>Other:</b>	<b>9.1%</b>	<b>4.7%</b>	<b>2.0%</b>	<b>2.0%</b>	<b>14.5%</b>	<b>4.7%</b>	<b>4.9%</b>

(Source: CAM, Horwath HTL estimates)

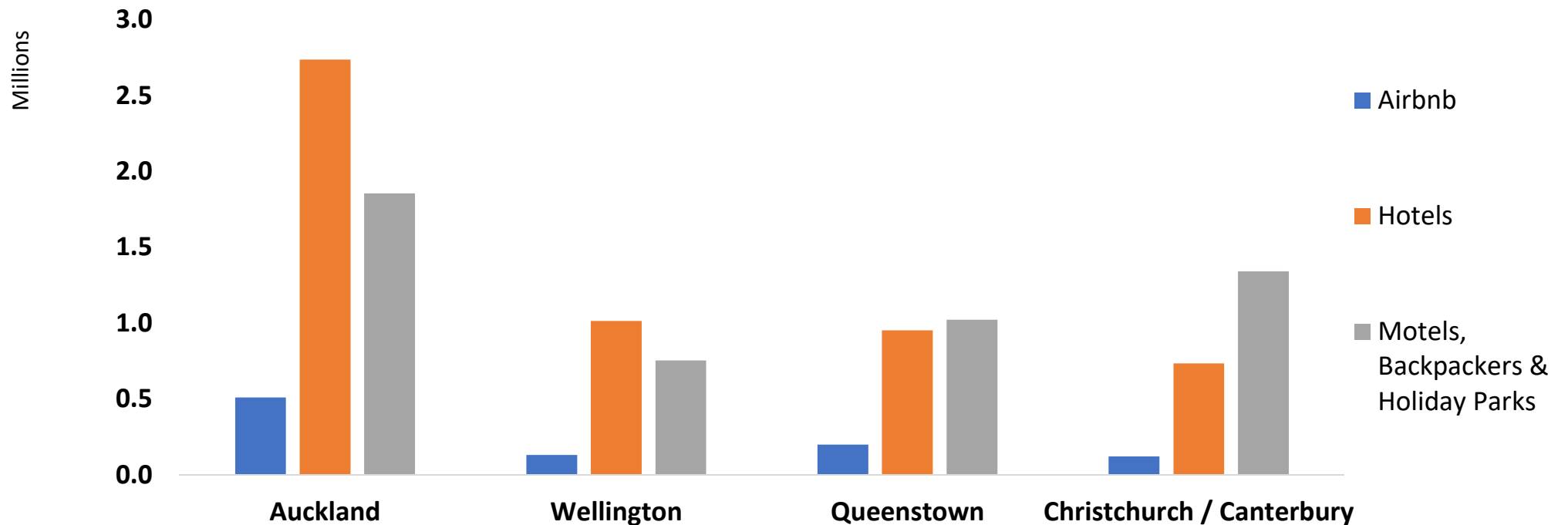


## Total Visitor Nights in New Zealand by Accommodation Type (2017)



(Source: Deloitte Access Economics, CAM)

## Stay Unit Nights / Total Booked Nights Top Four Regions for 2017



**Airbnb % of Hotels: 19%**

**13%**

**21%**

**16%**

**Airbnb % of All Commercial Accommodation: 11%**

**7%**

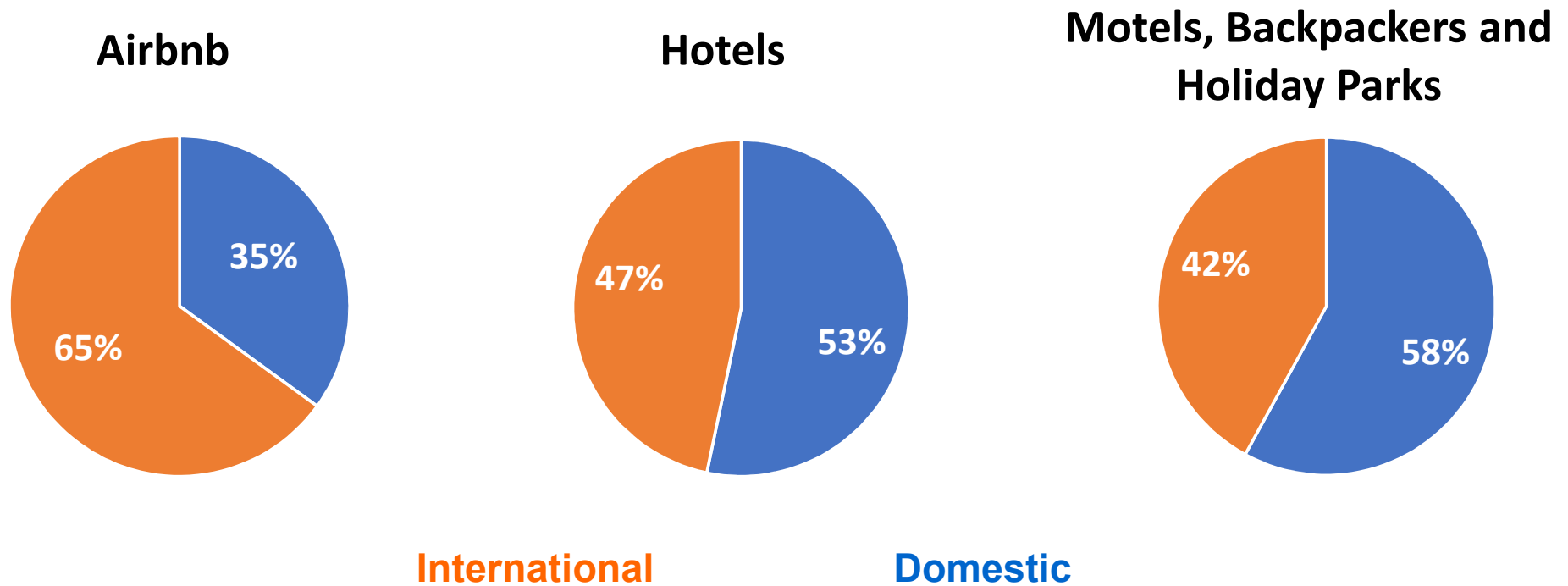
**10%**

**6%**

(Source: Deloitte Access Economics, CAM)



## 2017 Guest Night Mix by Accommodation Type



(Source: Deloitte Access Economics, Stats NZ)



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