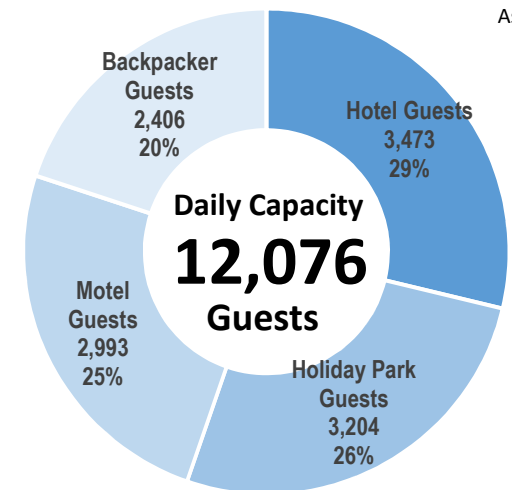


Rotorua Commercial Accommodation Analysis

Key Indicators	Hotels	Motels	Backpackers	Holiday Parks	Total
Capacity (as at 30 Sep 2019)					
Establishments	22	69	14	10	115
Daily Stay Units	1,828	1,247	2,005	1,393	6,473
Avg Stay Units/Est	83	18	143	139	56
Demand (Year End Sep 2019)					
Guest Arrivals	556,588	396,023	117,976	133,464	1,204,053
Domestic Nights					56% 1,282,873
International Nights					44% 1,014,425
Guest Nights	965,099	740,506	252,893	338,799	2,297,299
Avg Nights/Arrival	1.7	1.9	2.1	2.5	1.9
Utilisation (Year End Sep 2019)					
Stay Units Available	667,282	465,627	731,398	508,445	2,372,752
Stay Units Occupied	506,725	310,949	213,650	146,344	1,177,672
Occupancy	75.9%	66.8%	29.2%	28.8%	49.6%
Avg Guests/Unit	1.9	2.4	1.2	2.3	2.0

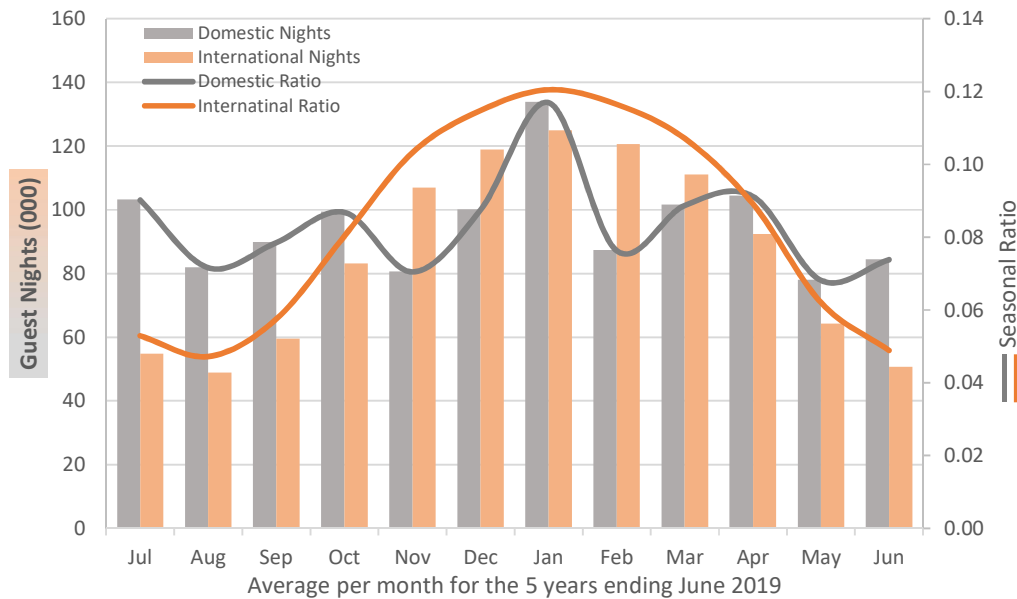
Guest Capacity by Accommodation Type

As at 30 Sep 2019

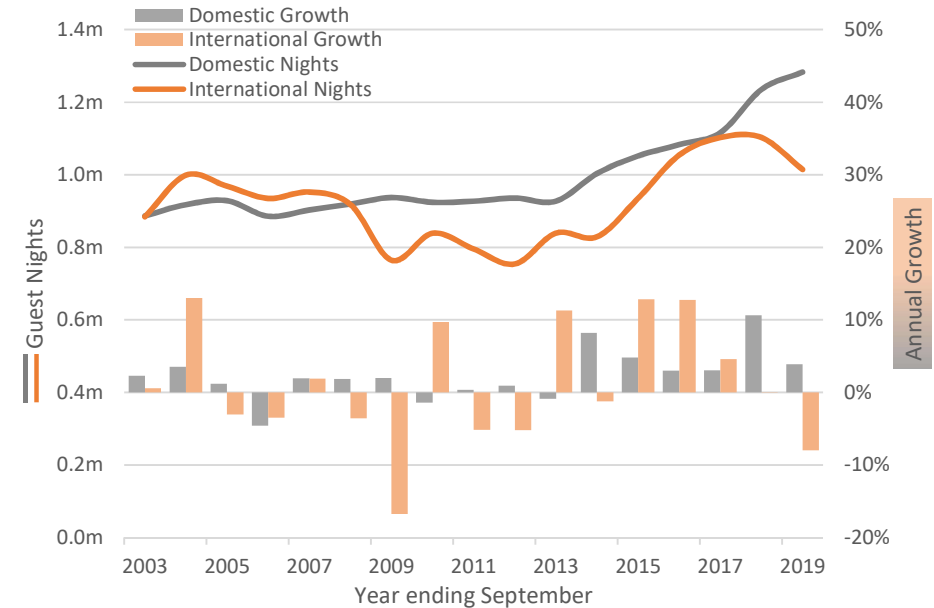


Guest Capacity is Daily Stay Units available multiplied by Average Guests/Unit

Seasonal Pattern of Demand by Guest Night Origin



Growth in Demand by Guest Night Origin



Stay unit varies by accommodation type: Hotel = room; Motel = motel unit; Backpackers = bed; Holiday park = site, cabin or dorm bed; Occupancy is the percentage of available stay units which are occupied

Source: StatsNZ, Accommodation Monitor

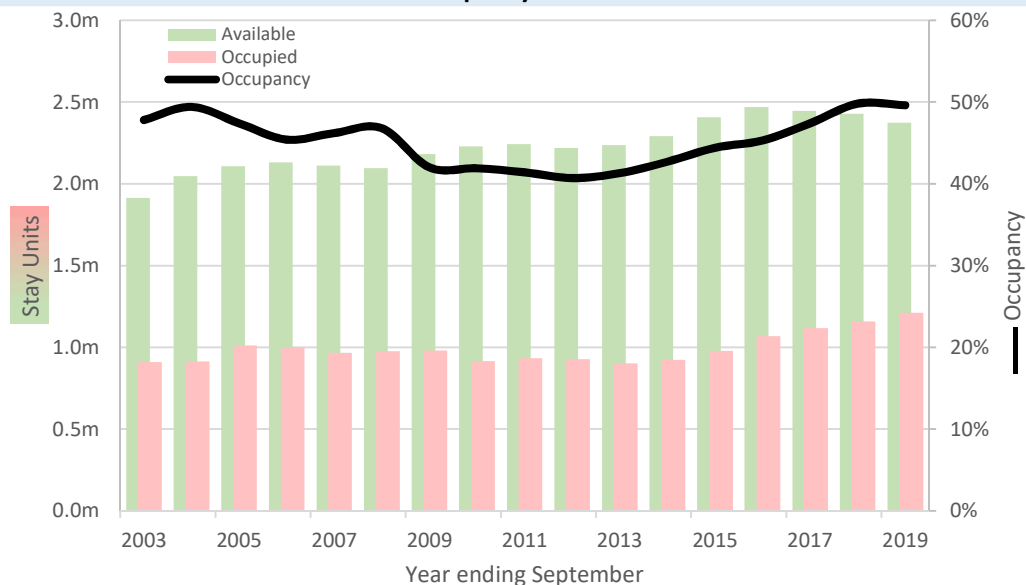
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Rotorua Commercial Accommodation Analysis - Total Accommodation

KEY INDICATORS	September		Avg annual growth 2014-19	
	2014	2019	Rotorua	NZL
Capacity (as at September)				
Establishments	123	115	-1.3%	-0.6%
Daily Stay Units	6,283	6,473	0.6%	0.9%
Avg Stay Units/Est	51	56	1.9%	1.8%
Demand (Year End September)				
Guest Arrivals	1,000,389	1,204,053	3.8%	3.7%
Domestic Nights	1,003,386	1,282,873	5.0%	2.7%
International Nights	829,049	1,014,425	4.1%	4.9%
Guest Nights	1,832,434	2,297,299	4.6%	3.6%
Avg Nights/Arrival	1.8	1.9	1.1%	0.0%
Utilisation (Year End September)				
Stay Units Available	2,292,819	2,372,752	0.7%	0.3%
Stay Units Occupied	979,178	1,177,672	3.8%	3.2%
Occupancy	42.7%	49.6%	1.4pts	1.2pts
Avg Guests/Unit	1.9	2.0	1.0%	1.1%

Key: Green highlighted growth indicates selected RTO exceeded national benchmark

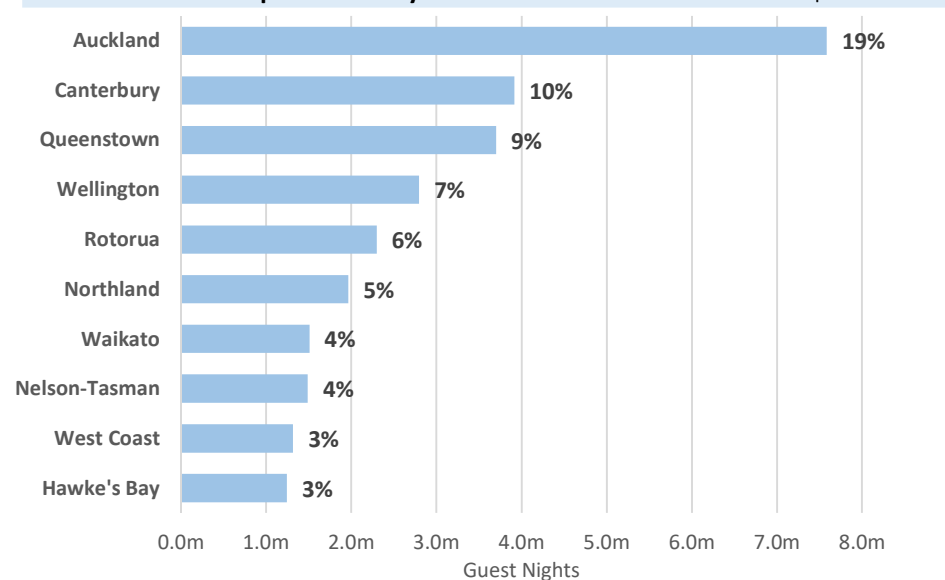
Trend in Capacity and Utilisation



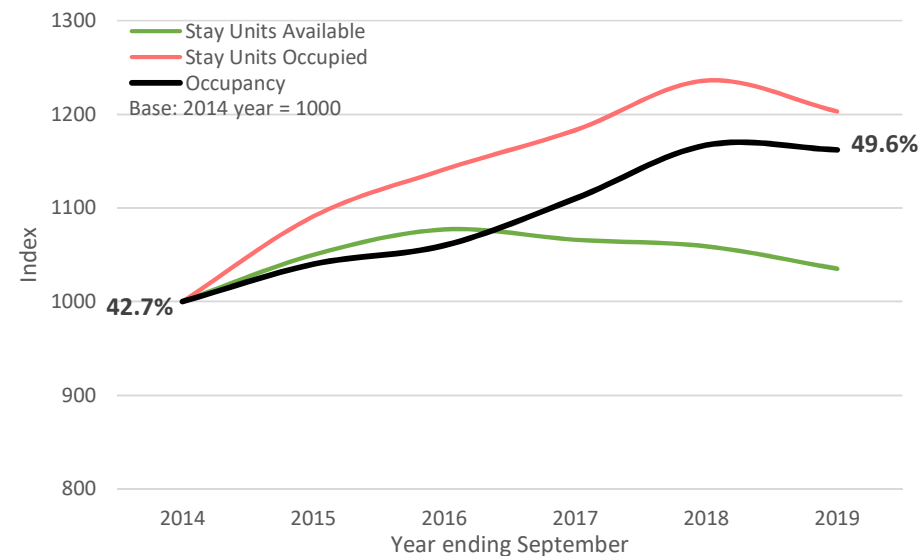
Source: StatsNZ, Accommodation Monitor

Top 10 Places by Demand

YE September 2019



Relative Growth in Capacity, Utilisation and Occupancy



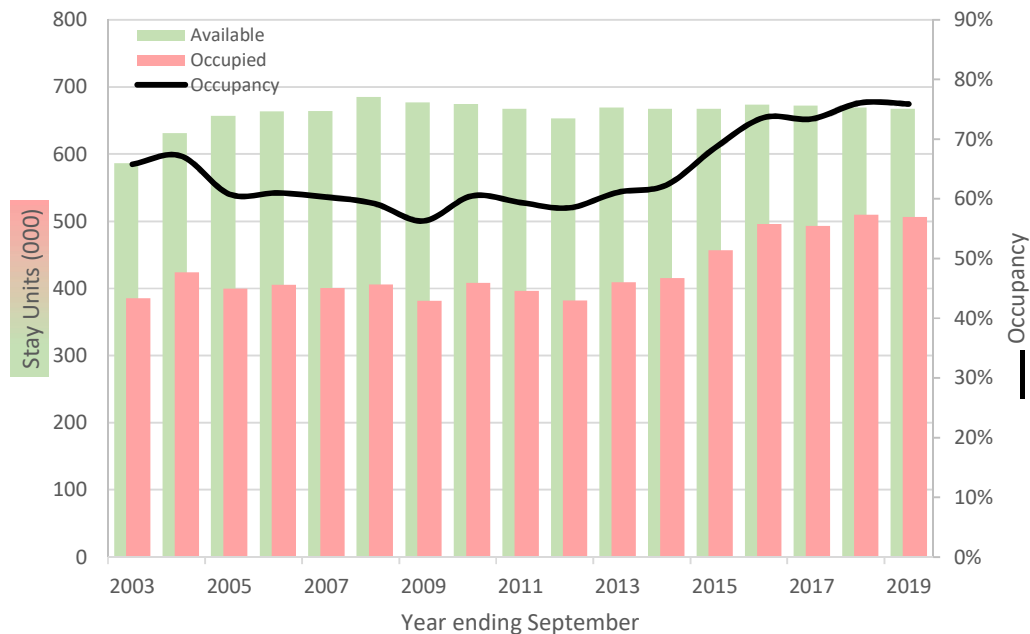
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Rotorua Commercial Accommodation Analysis - Hotels

KEY INDICATORS	September		Avg annual growth 2014-19	
	2014	2019	Rotorua	NZL
Capacity (as at September)				
Establishments	21	22	0.9%	0.0%
Daily Stay Units	1,812	1,828	0.2%	1.8%
Avg Stay Units/Est	86	83	-0.7%	2.0%
Demand (Year End September)				
Guest Arrivals	426,992	556,588	5.4%	5.9%
Guest Nights	769,134	965,099	4.6%	4.1%
Avg Nights/Arrival	1.8	1.7	-1.1%	-2.1%
Utilisation (Year End September)				
Stay Units Available	667,143	667,282	0.0%	1.4%
Stay Units Occupied	415,588	506,725	4.0%	4.0%
Occupancy	62.3%	75.9%	2.7pts	1.6pts
Avg Guests/Unit	1.9	1.9	0.0%	0.0%

Key: Green highlighted growth indicates selected RTO exceeded national benchmark

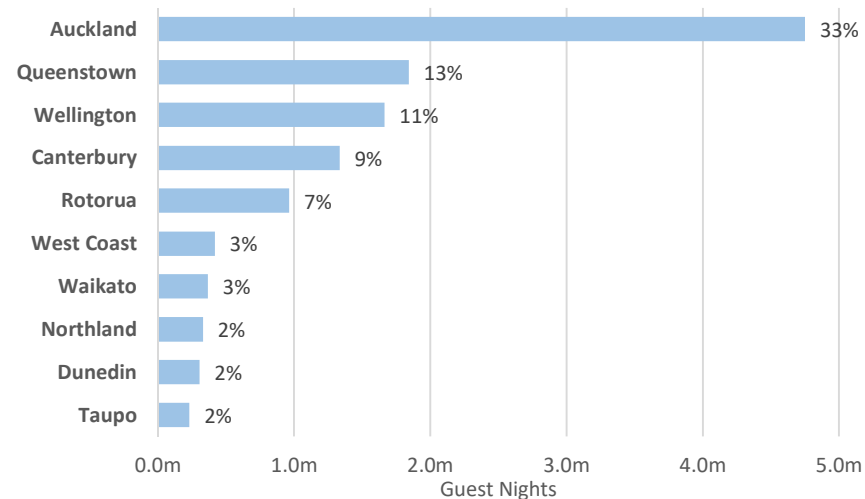
Trend in Capacity and Utilisation of Rotorua Hotels



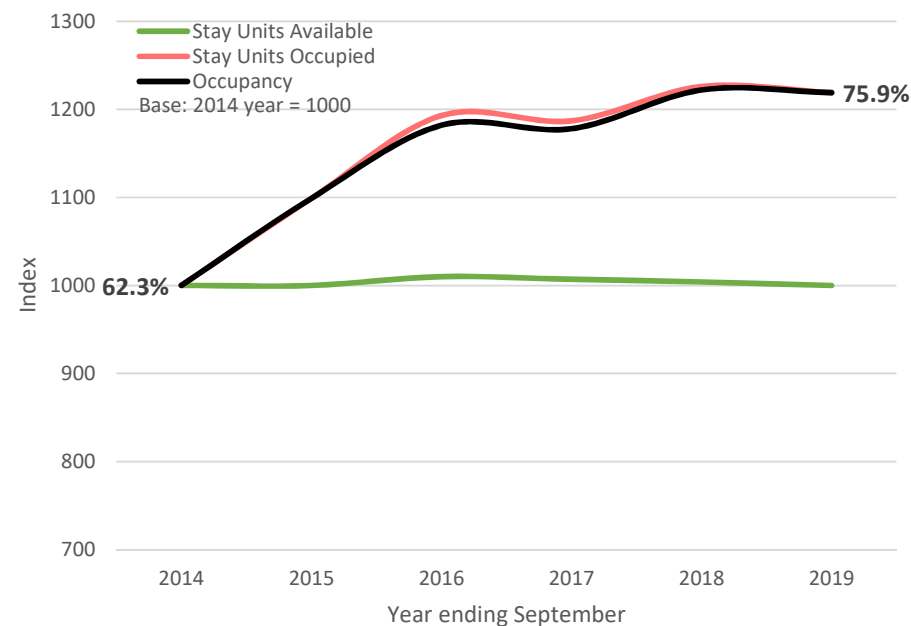
Source: StatsNZ, Accommodation Monitor

Top 10 Places for Hotels by Demand

YE September 2019



Relative Growth in Capacity and Utilisation of Rotorua Hotels



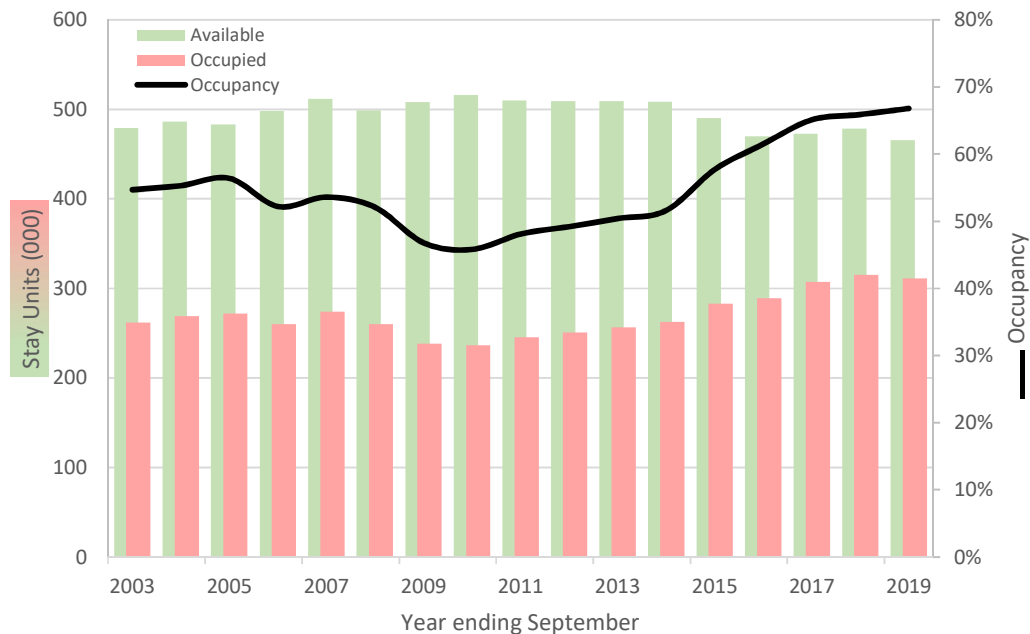
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Rotorua Commercial Accommodation Analysis - Motels

KEY INDICATORS	September		Avg annual growth 2014-19	
	2014	2019	Rotorua	NZL
Capacity (as at September)				
Establishments	77	69	-2.2%	0.0%
Daily Stay Units	1,371	1,247	-1.9%	0.2%
Avg Stay Units/Est	18	18	0.0%	0.0%
Demand (Year End September)				
Guest Arrivals	355,272	396,023	2.2%	2.4%
Guest Nights	617,382	740,506	3.7%	2.8%
Avg Nights/Arrival	1.7	1.9	2.2%	0.0%
Utilisation (Year End September)				
Stay Units Available	508,677	465,627	-1.8%	0.1%
Stay Units Occupied	262,590	310,949	3.4%	2.8%
Occupancy	51.6%	66.8%	3.0pts	1.5pts
Avg Guests/Unit	2.4	2.4	0.0%	0.0%

Key: Green highlighted growth indicates selected RTO exceeded national benchmark

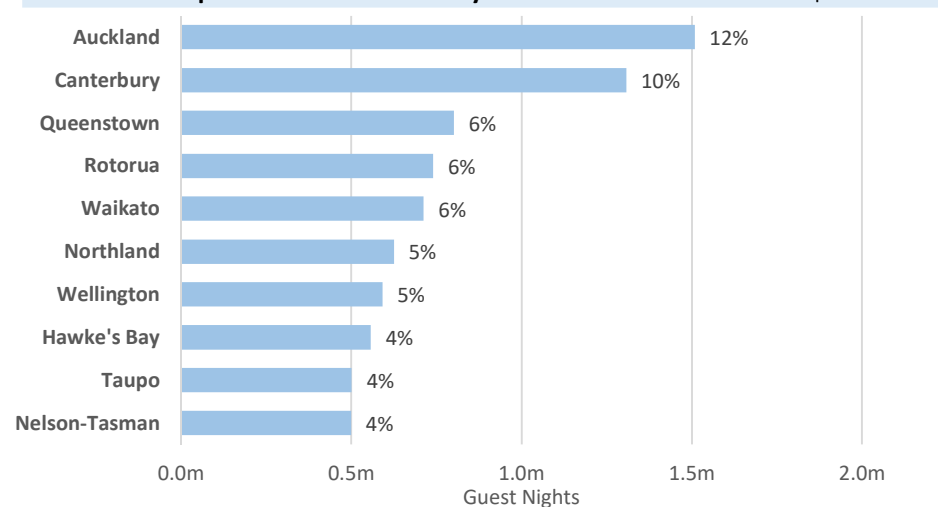
Trend in Capacity and Utilisation of Rotorua Motels



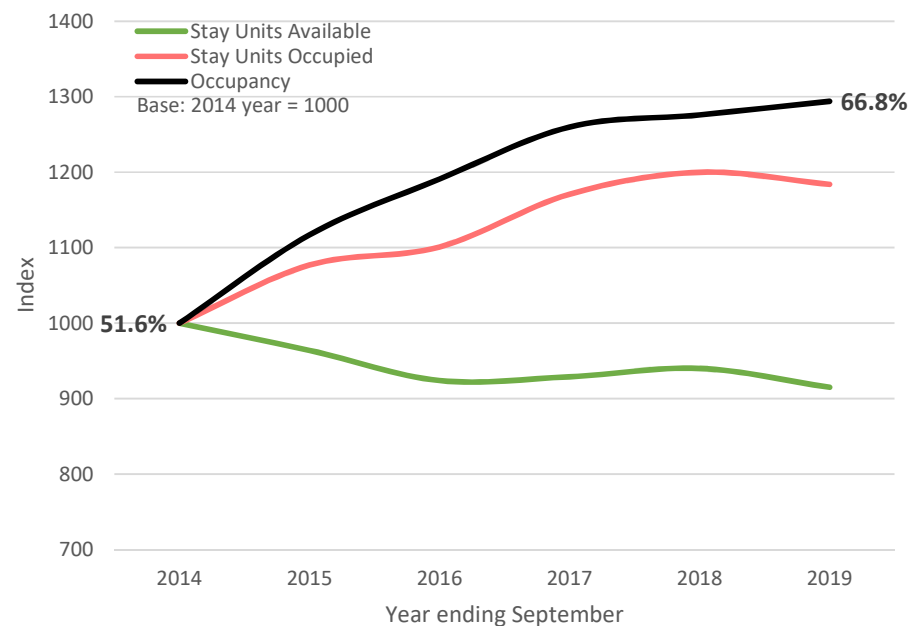
Source: StatsNZ, Accommodation Monitor

Top 10 Places for Motels by Demand

YE September 2019



Relative Growth in Capacity and Utilisation of Rotorua Motels



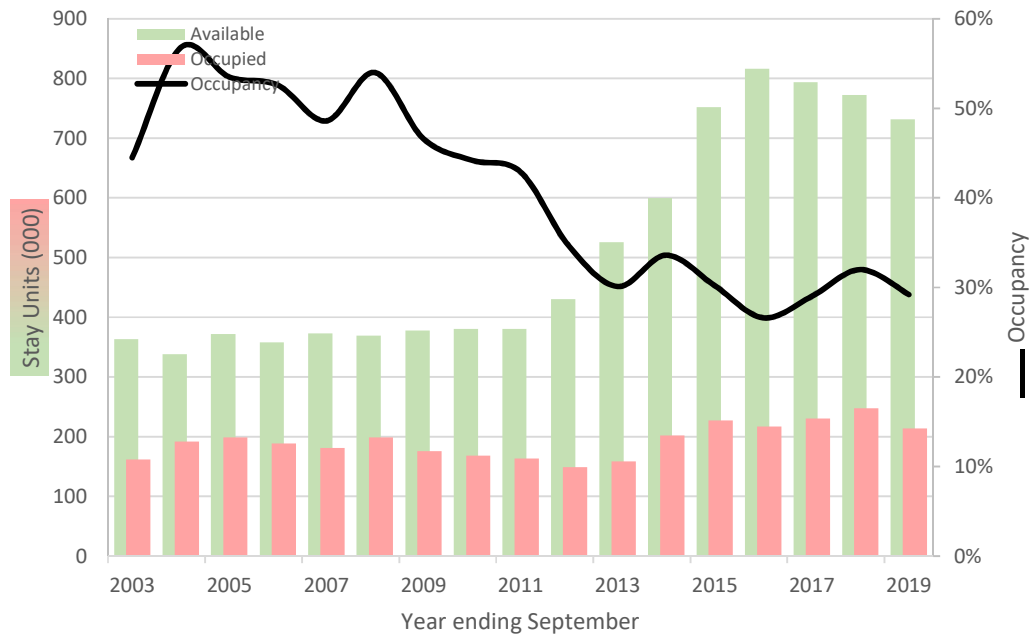
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Rotorua Commercial Accommodation Analysis - Backpackers

KEY INDICATORS	September		Avg annual growth 2014-19	
	2014	2019	Rotorua	NZL
Capacity (as at September)				
Establishments	15	14	-1.4%	0.0%
Daily Stay Units	1,759	2,005	2.7%	0.4%
Avg Stay Units/Est	117	143	4.1%	0.3%
Demand (Year End September)				
Guest Arrivals	115,431	117,976	0.4%	0.7%
Guest Nights	215,355	252,893	3.3%	1.4%
Avg Nights/Arrival	1.9	2.1	2.0%	0.0%
Utilisation (Year End September)				
Stay Units Available	599,589	731,398	4.1%	0.0%
Stay Units Occupied	201,732	213,650	1.2%	0.5%
Occupancy	33.6%	29.2%	-0.9pts	0.2pts
Avg Guests/Unit	1.1	1.2	1.8%	1.8%

Key: Green highlighted growth indicates selected RTO exceeded national benchmark

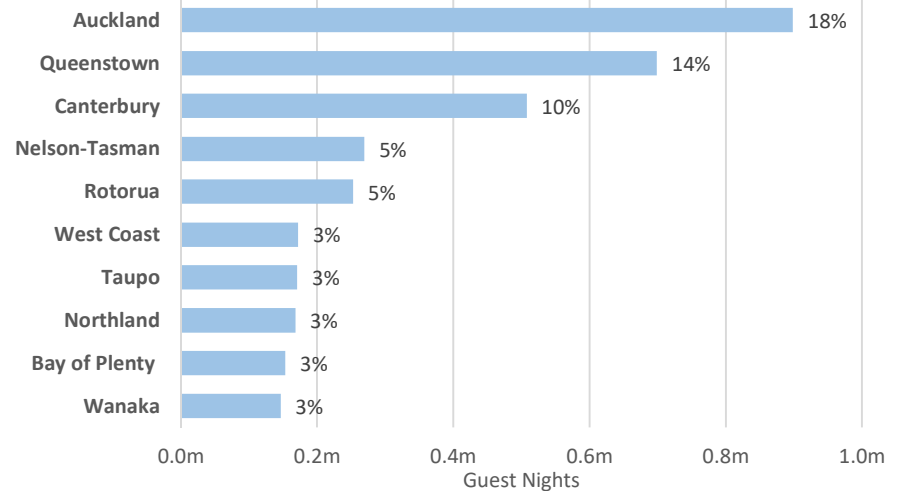
Trend in Capacity and Utilisation of Rotorua Backpackers



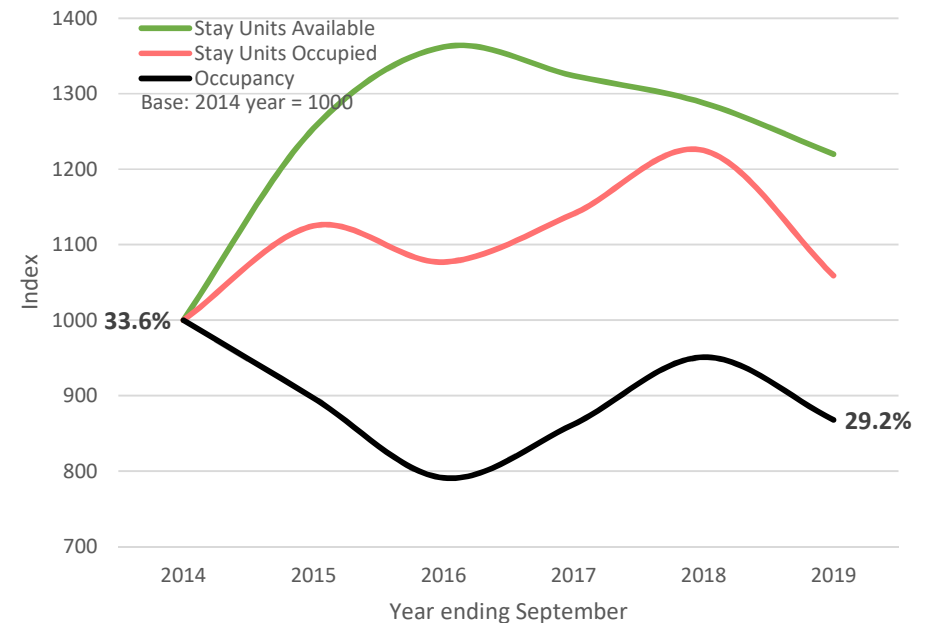
Source: StatsNZ, Accommodation Monitor

Top 10 Places for Backpackers by Demand

YE September 2019



Relative Growth in Capacity and Utilisation of Rotorua Backpackers



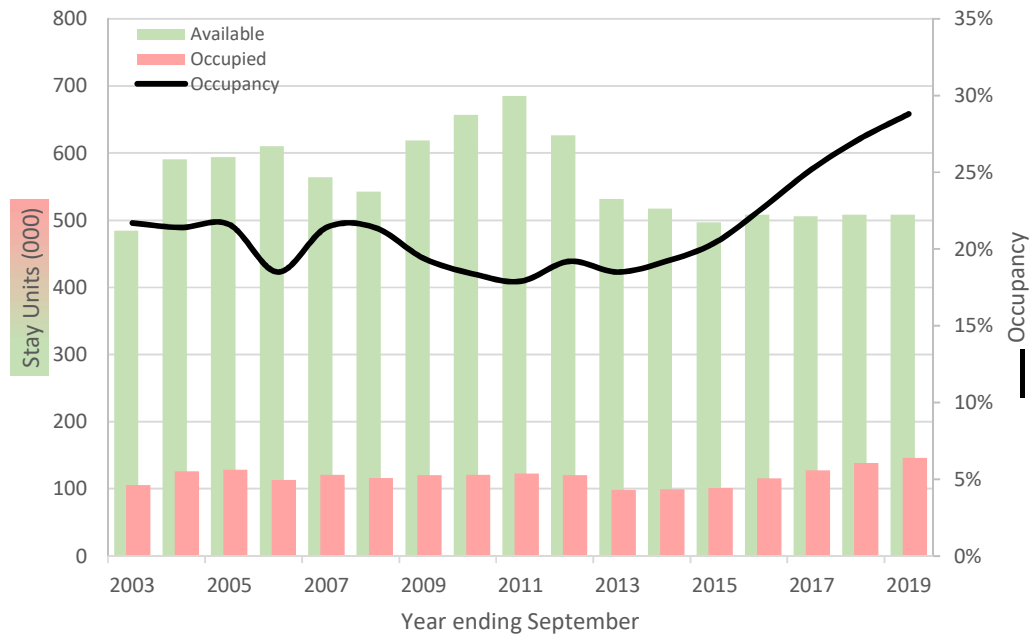
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Rotorua Commercial Accommodation Analysis - Holiday Parks

KEY INDICATORS	September		Avg annual growth 2014-19	
	2014	2019	Rotorua	NZL
Capacity (as at September)				
Establishments	10	10	0.0%	0.0%
Daily Stay Units	1,341	1,393	0.8%	0.8%
Avg Stay Units/Est	134	139	0.7%	0.8%
Demand (Year End September)				
Guest Arrivals	102,696	133,464	5.4%	4.0%
Guest Nights	230,563	338,799	8.0%	5.4%
Avg Nights/Arrival	2.2	2.5	2.6%	0.9%
Utilisation (Year End September)				
Stay Units Available	517,410	508,445	-0.3%	-0.2%
Stay Units Occupied	99,268	146,344	8.1%	5.4%
Occupancy	19.2%	28.8%	1.9pts	1.0pts
Avg Guests/Unit	2.3	2.3	0.0%	0.0%

Key: Green highlighted growth indicates selected RTO exceeded national benchmark

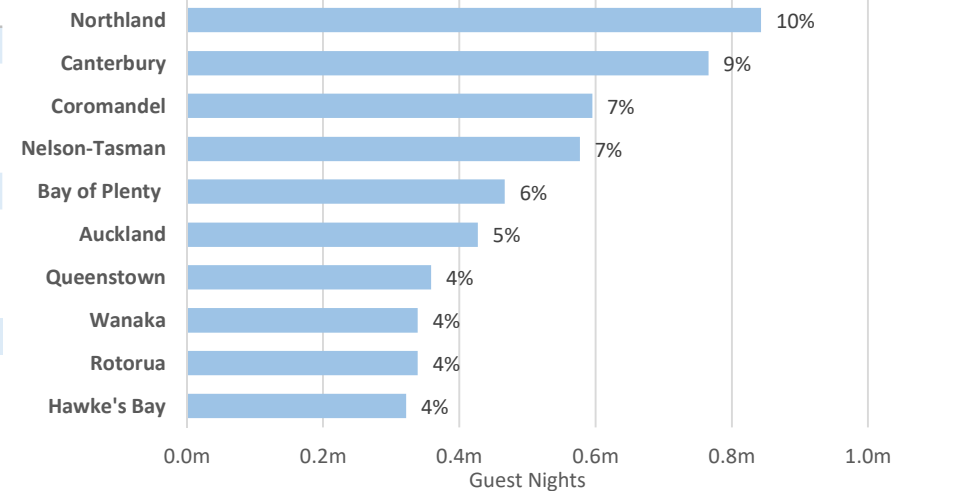
Trend in Capacity and Utilisation of Rotorua Holiday Parks



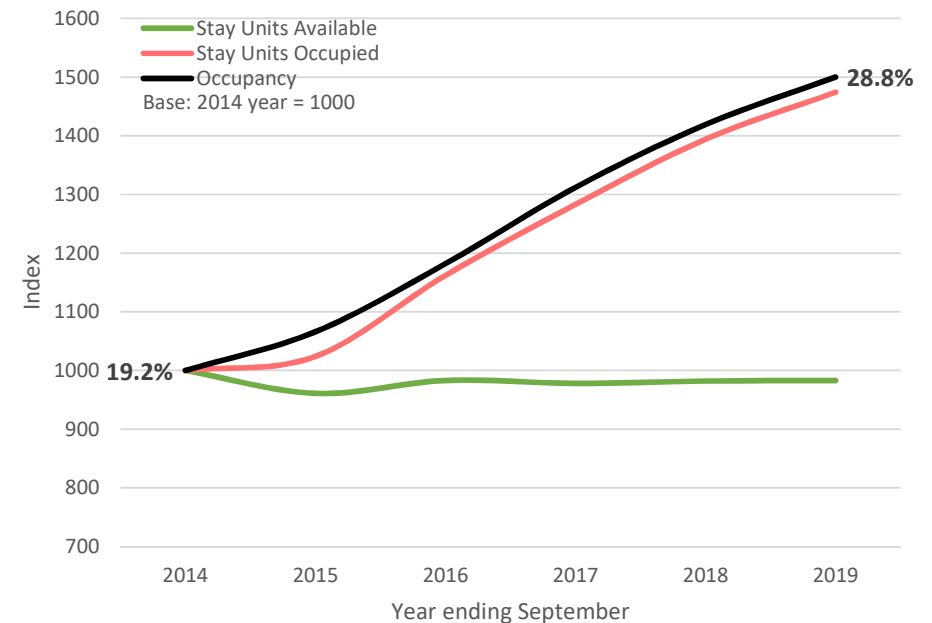
Source: StatsNZ, Accommodation Monitor

Top 10 Places for Holiday Parks by Demand

YE September 2019



Relative Growth in Capacity and Utilisation of Rotorua Holiday Parks



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