



Commercial Accommodation Monitor:

August 2019

Hawke's Bay

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Citation

Stats NZ (2019). *Commercial Accommodation Monitor: August 2019– Hawke’s Bay*. Wellington: Stats NZ.

Published in October 2019 by

Stats NZ
Tatauranga Aotearoa
Wellington, New Zealand

Preface

Commercial Accommodation Monitor: August 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).

The September 2019 monitor will be released on 14 November 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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3 Origin of guests

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1 Highlights

Monthly highlights

In August 2019 compared with August 2018:

- Guest nights rose 4.4 percent to 72,752
- International guest nights fell 9.3 percent to 12,547
- Domestic guest nights rose 7.8 percent to 60,206
- The average length of stay fell from 2.38 nights to 2.23 nights
- The overall occupancy rate rose from 34.5 percent to 37.3 percent
- The occupancy rate, excluding holiday parks, was 51.7 percent in August 2019
- Accommodation capacity, excluding holiday parks, fell 1.4 percent.

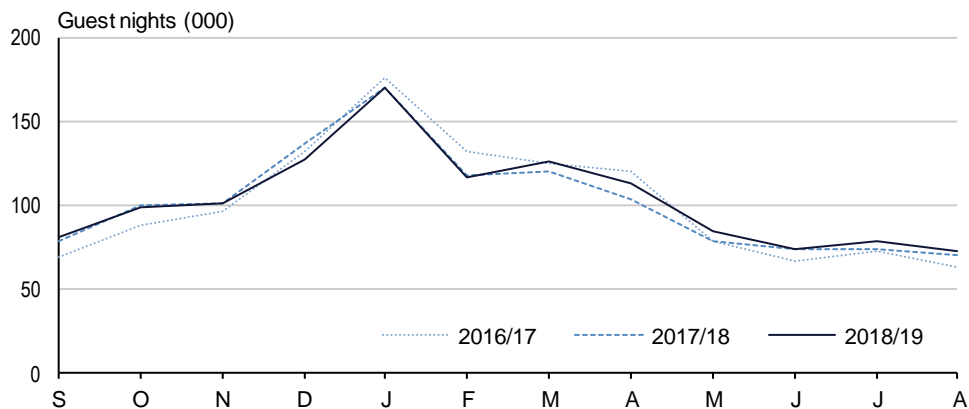
Response rates for August 2019

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

The proportion of the origin-of-guest estimate from unadjusted data was 70 percent.

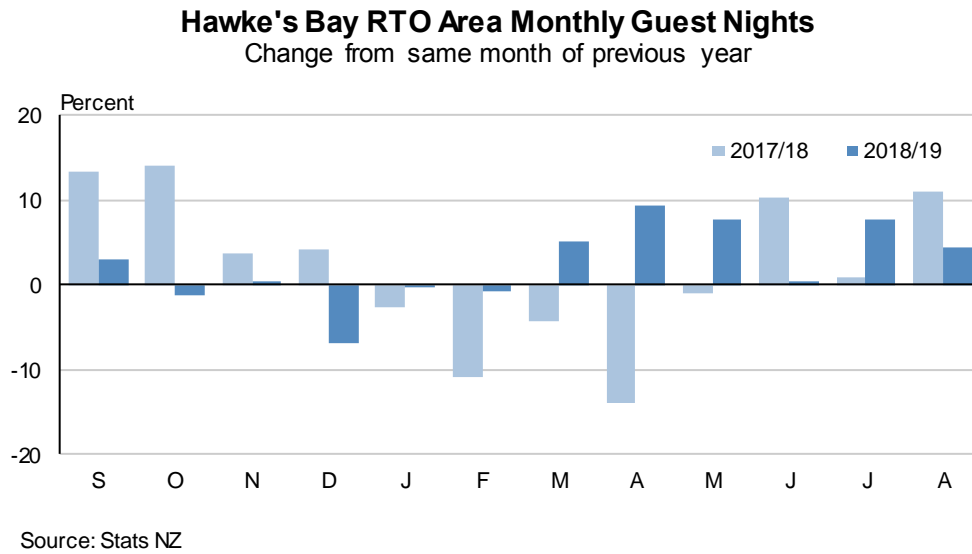
Figure 1.1

Hawke's Bay RTO Area Monthly Guest Nights



Source: Stats NZ

Figure 1.2

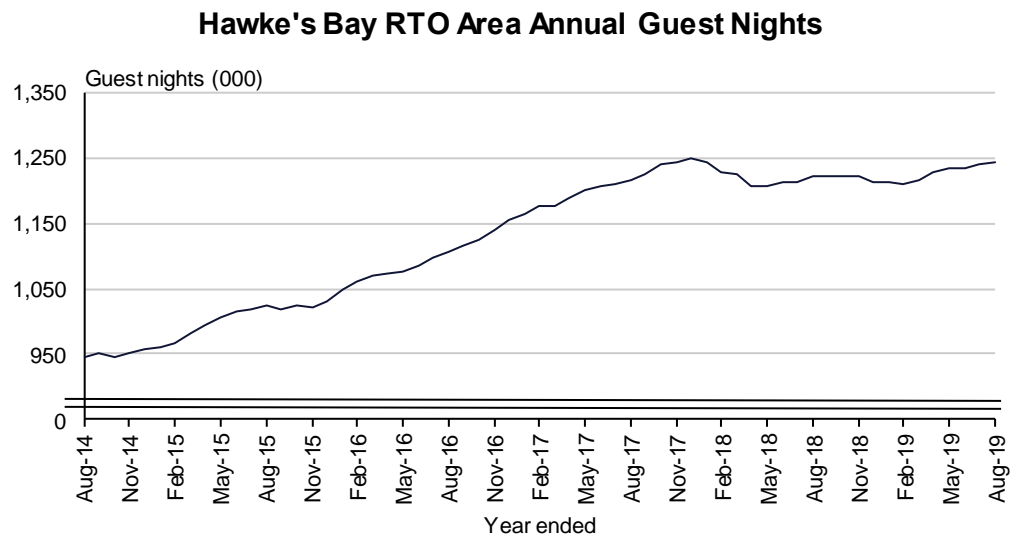


Year ended highlights

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

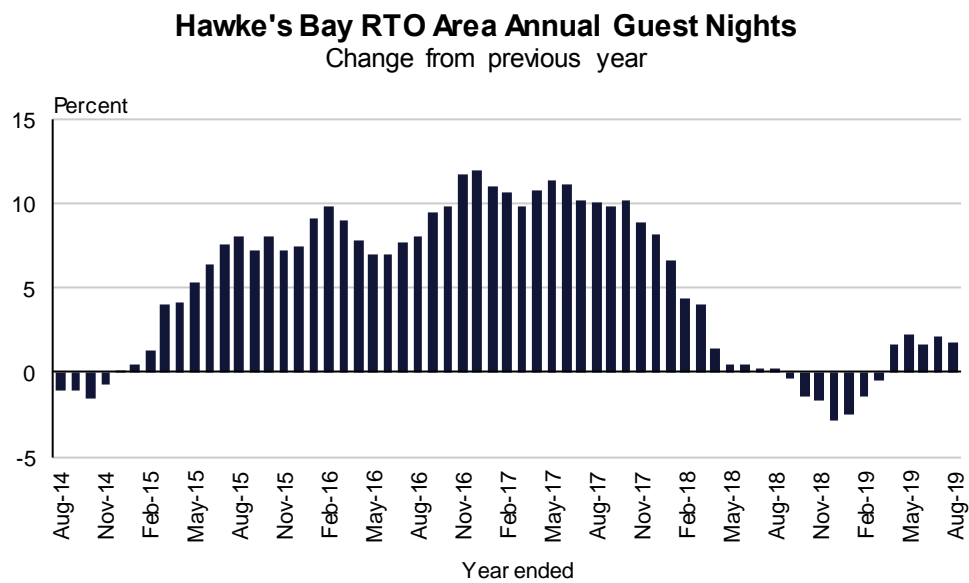
- Guest nights rose 1.8 percent to 1,241,327
- International guest nights fell 4.0 percent to 310,984
- Domestic guest nights rose 3.8 percent to 930,343
- The average length of stay remained at 2.30 nights
- The overall occupancy rate rose from 46.7 percent to 48.5 percent
- The occupancy rate, excluding holiday parks, was 63.6 percent for the year ended August 2019
- Accommodation capacity, excluding holiday parks, fell 3.7 percent.

Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

2 Accommodation variables

In August 2019, compared with August 2018, there was an increase of 4.4 percent in total guest nights for the Hawke's Bay RTO area. Holiday parks had the largest increase, followed by backpackers. Hotels had the only decrease.

For the year ended August 2019, compared with the previous August year, total guest nights for the Hawke's Bay RTO area increased 1.8 percent. Holiday parks had the largest increase, followed by hotels. Motels had the only 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
	2018	2019		August 2018	August 2019	
Guest nights						
Total guest nights	69,694	72,752	4.4	1,219,955	1,241,327	1.8
International	13,838	12,547	-9.3	323,804	310,984	-4.0
Domestic	55,856	60,206	7.8	896,151	930,343	3.8
Hotels	14,255	13,768	-3.4	213,213	222,433	4.3
Motels/apartments	38,603	38,669	0.2	561,330	553,130	-1.5
Backpackers	6,632	7,726	16.5	143,530	144,965	1.0
Holiday parks	10,204	12,590	23.4	301,882	320,799	6.3
Occupancy rates ⁽³⁾ (%)						
Hotels	54.0	54.2	0.5	63.9	65.2	2.1
Motels/apartments	61.3	64.9	5.8	68.4	69.6	1.8
Backpackers	25.1	28.1	11.9	45.5	51.8	13.7
Holiday parks	10.6	13.2	24.7	23.5	24.9	5.9
Total	34.5	37.3	8.1	46.7	48.5	3.8
Total excluding holiday parks ⁽⁴⁾	49.4	51.7	4.8	60.7	63.6	4.7
Average length of stay ⁽⁵⁾						
Hotels	1.76	1.80	2.1	1.69	1.76	3.6
Motels/apartments	2.31	2.08	-9.6	2.13	2.05	-3.4
Backpackers	4.10	3.93	-4.2	3.67	4.48	22.1
Holiday parks	3.54	2.88	-18.7	2.99	2.87	-4.0
Total	2.38	2.23	-5.9	2.30	2.30	-0.2
Guest arrivals						
Hotels	8,094	7,658	-5.4	125,830	126,724	0.7
Motels/apartments	16,746	18,555	10.8	263,949	269,178	2.0
Backpackers	1,618	1,967	21.5	39,093	32,334	-17.3
Holiday parks	2,883	4,377	51.8	101,129	111,888	10.6
Total	29,342	32,557	11.0	530,001	540,124	1.9
Establishments						
Hotels	19	18	-5.3	19	18	-5.3
Motels/apartments	66	62	-6.1	66	62	-6.1
Backpackers	13	13	0.0	13	13	0.0
Holiday parks	20	19	-5.0	20	19	-5.0
Total	118	112	-5.1	118	112	-5.1
Capacity ⁽⁶⁾						
Hotels	16,926	16,895	-0.2	198,835	198,018	-0.4
Motels/apartments	36,704	35,433	-3.5	432,534	419,545	-3.0
Backpackers	21,297	21,545	1.2	262,619	243,133	-7.4
Holiday parks	46,717	44,361	-5.0	537,102	547,669	2.0
Total	121,644	118,234	-2.8	1,431,090	1,408,365	-1.6

(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:

C confidential

3 Origin of guests

In August 2019, international guests accounted for 17.2 percent of all guest nights in the Hawke's Bay RTO area. When compared with August 2018, the number of international guest nights spent in the area in August 2019 was down 9.3 percent to 12,547. Domestic guest nights increased 7.8 percent, to 60,206, for the same period.

The proportion of the origin-of-guest estimate from actual data was 70 percent for August 2019.

Figure 3.1

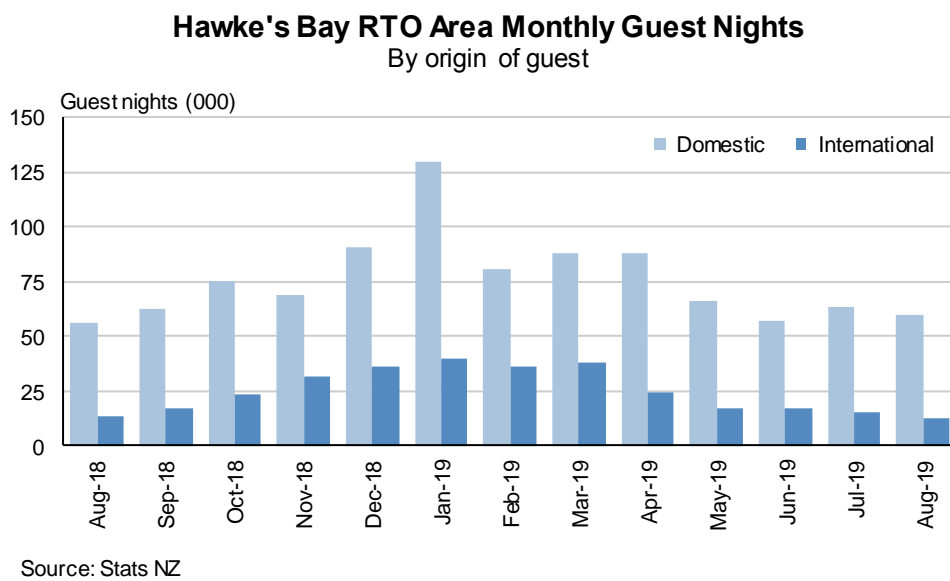


Table 3.1

Hawke's Bay and New Zealand Monthly Guest Nights*By origin of guest*

		Haw ke's Bay RTO ⁽¹⁾ area			New Zealand		
		Origin of guest		Total	Origin of guest		Total
		Domestic	International		Domestic	International	
Month							
2018	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
	Apr	88,001	24,614	112,615	2,123,710	1,480,938	3,604,648
	May	66,419	17,487	83,906	1,592,880	970,273	2,563,153
	Jun	56,704	17,214	73,918	1,498,095	799,876	2,297,971
	Jul	63,602	15,288	78,890	1,733,055	965,763	2,698,818
	Aug	60,206	12,547	72,752	1,659,593	957,634	2,617,226
Percent change from the current month of the previous year							
		7.8	-9.3	4.4	5.6	0.5	3.7
Year ended							
August 2018		896,151	323,804	1,219,955	22,456,939	17,523,822	39,980,761
August 2019		930,343	310,984	1,241,327	23,351,664	17,171,166	40,522,830
Percent change from previous year							
		3.8	-4.0	1.8	4.0	-2.0	1.4

(1) Regional tourism organisation

4 National results

In August 2019, a total of 2,617,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 93,000 nights (3.7 percent) from August 2018. Both the North Island (up 66,000 or 4.3 percent) and South Island (up 27,000 or 2.8 percent) recorded an increase.

All four accommodation types recorded an increase in guest nights in August 2019, compared with August 2018. Hotels had the largest increase in guest nights (up 42,000 or 3.9 percent), followed by motels (up 22,000 or 2.5 percent), backpackers (up 19,000 or 6.4 percent), and holiday parks (up 10,000 or 3.4 percent).

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	
	2017	2018	2019	2017 to 2018	2018 to 2019
August month					
Hawke's Bay RTO area					
Hotels	14,316	14,255	13,768	-0.4	-3.4
Motels	32,573	38,603	38,669	18.5	0.2
Backpackers	6,467	6,632	7,726	2.6	16.5
Holiday parks	9,438	10,204	12,590	8.1	23.4
Total	62,793	69,694	72,752	11.0	4.4
New Zealand					
Hotels	1,027,233	1,068,787	1,110,768	4.0	3.9
Motels	818,685	848,372	869,958	3.6	2.5
Backpackers	305,590	294,424	313,409	-3.7	6.4
Holiday parks	289,089	312,599	323,092	8.1	3.4
Total	2,440,597	2,524,181	2,617,226	3.4	3.7
Year ended August					
Hawke's Bay RTO area					
Hotels	192,502	213,213	222,433	10.8	4.3
Motels	589,373	561,330	553,130	-4.8	-1.5
Backpackers	162,924	143,530	144,965	-11.9	1.0
Holiday parks	271,863	301,882	320,799	11.0	6.3
Total	1,216,663	1,219,955	1,241,327	0.3	1.8
New Zealand					
Hotels	13,759,198	14,254,660	14,558,154	3.6	2.1
Motels	12,298,184	12,403,182	12,485,871	0.9	0.7
Backpackers	5,172,628	5,087,753	5,015,334	-1.6	-1.4
Holiday parks	7,756,898	8,235,166	8,463,471	6.2	2.8
Total	38,986,909	39,980,761	40,522,830	2.5	1.4

5 Regional comparison

In August 2019, Wellington recorded the largest increase in guest nights (up 23,000 or 12 percent) from August 2018. This was followed by Queenstown (up 22,000 or 7.6 percent), Auckland (up 20,000 or 3.5 percent), Rotorua (up 7,000 or 5.3 percent), and Waikato (up 6,000 or 6.3 percent).

Wanaka recorded the largest decrease (down 4,000 or 5.8 percent), followed by Taupo (down 4,000 or 5.4 percent), West Coast (down 3,000 or 4.8 percent), Central Otago (down 2,000 or 16 percent), and Bay of Plenty (down 2,000 or 2.9 percent).

Table 5.1

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

RTO area	August guest nights								
	Domestic			International			Total		
	2018	2019	Percent age change	2018	2019	Percent age change	2018	2019	Percent age change
Northland	57,762	64,623	11.9	29,213	26,284	-10.0	86,975	90,907	4.5
Auckland	328,885	343,835	4.5	242,055	246,899	2.0	570,940	590,734	3.5
Coromandel	27,100	27,122	0.1	9,022	7,778	-13.8	36,123	34,900	-3.4
Waikato	74,244	81,983	10.4	19,103	17,217	-9.9	93,347	99,200	6.3
Bay of Plenty	52,750	50,073	-5.1	14,142	14,853	5.0	66,892	64,926	-2.9
Rotorua	92,344	94,618	2.5	47,091	52,248	11.0	139,435	146,867	5.3
Taupo	50,916	50,634	-0.6	20,816	17,188	-17.4	71,731	67,822	-5.4
Whakatane-Kawerau	9,949	11,668	17.3	1,657	1,776	7.1	11,606	13,444	15.8
Gisborne	18,522	21,301	15.0	1,912	2,842	48.7	20,433	24,143	18.2
Taranaki	31,013	32,153	3.7	5,051	5,335	5.6	36,063	37,488	4.0
Hawke's Bay	55,856	60,206	7.8	13,838	12,547	-9.3	69,694	72,752	4.4
Ruapehu	44,181	41,082	-7.0	7,578	9,539	25.9	51,759	50,621	-2.2
Manawatu	37,312	37,241	-0.2	5,786	5,209	-10.0	43,098	42,450	-1.5
Whanganui	11,171	11,715	4.9	1,567	1,885	20.3	12,738	13,600	6.8
Wairarapa	13,381	14,836	10.9	1,318	1,288	-2.2	14,698	16,124	9.7
Kapiti-Horowhenua	13,061	15,051	15.2	1,548	1,611	4.1	14,610	16,662	14.0
Wellington	146,016	170,921	17.1	46,747	45,021	-3.7	192,763	215,942	12.0
Marlborough	23,852	28,767	20.6	9,337	8,738	-6.4	33,189	37,505	13.0
Nelson-Tasman	44,203	45,106	2.0	15,537	19,038	22.5	59,740	64,143	7.4
Canterbury	148,685	151,459	1.9	97,916	99,146	1.3	246,601	250,605	1.6
Hurunui	14,663	14,761	0.7	6,090	6,217	2.1	20,753	20,978	1.1
Mackenzie	16,856	19,952	18.4	35,465	33,598	-5.3	52,320	53,550	2.3
Timaru	13,569	10,701	-21.1	3,179	4,154	30.7	16,748	14,855	-11.3
West Coast	26,640	28,833	8.2	29,059	24,193	-16.7	55,700	53,026	-4.8
Wanaka	27,164	28,545	5.1	47,691	41,948	-12.0	74,855	70,493	-5.8
Queenstown	98,601	107,304	8.8	188,400	201,376	6.9	287,000	308,680	7.6
Waitaki	12,858	12,521	-2.6	7,958	7,632	-4.1	20,816	20,154	-3.2
Central Otago	11,253	9,226	-18.0	2,694	2,424	-10.0	13,946	11,650	-16.5
Dunedin	40,235	42,331	5.2	17,962	15,849	-11.8	58,197	58,180	0.0
Clutha	3,946	2,896	-26.6	906	1,004	10.8	4,852	3,900	-19.6
Fiordland	6,781	7,605	12.1	15,369	16,214	5.5	22,150	23,819	7.5
Southland	17,734	20,525	15.7	6,675	6,583	-1.4	24,409	27,108	11.1
Total	1,571,502	1,659,593	5.6	952,679	957,634	0.5	2,524,181	2,617,226	3.7

Table 5.2

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

RTO area	August 2019 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks ⁽²⁾
	Percent					
Northland	31.6	42.4	19.6	10.4	19.2	32.5
Auckland	75.8	63.3	45.6	16.9	60.4	66.5
Coromandel	35.2	24.7	14.5	8.8	12.6	21.9
Waikato	59.4	57.4	20.9	11.2	35.6	49.4
Bay of Plenty	49.1	53.5	26.8	13.9	28.0	42.0
Rotorua	66.1	55.6	18.9	16.9	38.9	44.9
Taupo	50.6	47.6	26.3	10.8	30.6	40.7
Whakatane-Kawerau	C	49.8	C	6.8	15.1	40.4
Gisborne	C	56.7	C	5.9	20.0	50.1
Taranaki	42.8	43.7	22.2	10.0	28.2	40.8
Hawke's Bay	54.2	64.9	28.1	13.2	37.3	51.7
Ruaapehu	63.3	37.4	C	C	38.1	C
Manawatu	43.3	53.5	C	C	36.3	C
Whanganui	C	48.5	36.9	C	25.8	C
Wairarapa	38.7	46.2	C	C	22.3	C
Kapiti-Horowhenua	C	60.5	C	C	19.1	C
Wellington	74.9	69.9	C	C	61.5	C
Marlborough	32.7	45.2	19.3	18.3	27.6	33.6
Nelson-Tasman	41.1	44.6	28.6	8.7	22.0	37.0
Canterbury	63.4	49.0	29.0	12.8	36.0	47.9
Hurunui	C	41.7	C	11.1	22.7	32.3
Mackenzie	C	41.2	C	17.9	38.8	48.6
Timaru	C	46.7	C	10.5	24.1	41.4
West Coast	20.6	32.7	14.4	8.2	18.0	21.9
Wanaka	66.7	84.5	51.4	13.6	37.9	65.0
Queenstown	83.9	70.4	71.9	23.9	70.0	77.3
Waitaki	33.5	43.9	35.2	7.3	22.6	37.9
Central Otago	C	46.2	C	2.4	9.3	32.4
Dunedin	51.6	61.1	30.8	17.1	43.7	50.9
Clutha	C	39.8	C	C	12.8	C
Fiordland	24.1	26.2	C	C	18.6	C
Southland	C	47.5	C	7.9	30.4	38.3
Total	63.3	52.4	33.4	11.5	37.2	50.9

(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 Hawke's Bay RTO area.

Table 6.1

Local Authority and Hawke's Bay Accommodation Results⁽¹⁾

Accommodation type	August 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	31	13,578	14,357	2.19	62.99
Backpackers	5	9,176	C	C	C
Holiday parks	9	17,887	3,775	C	10.43
Total	50	43,555	22,947	2.35	32.33
Napier City					
Hotels	9	12,152	11,115	1.76	62.74
Motels	26	19,499	21,302	1.99	65.63
Backpackers	7	11,935	5,014	C	29.78
Holiday parks	5	16,554	7,191	C	19.44
Total	47	60,140	44,622	2.20	45.22
Wairoa and Central Hawke's Bay Districts					
Hotels	4	1,829	C	C	C
Motels	5	2,356	3,009	2.35	69.91
Backpackers	1	434	C	C	C
Holiday parks	5	9,920	1,623	1.73	7.79
Total	15	14,539	5,183	2.08	19.24
Hawke's Bay Regional Tourism Organisation area					
Hotels	18	16,895	13,768	1.80	54.20
Motels	62	35,433	38,669	2.08	64.91
Backpackers	13	21,545	7,726	3.93	28.12
Holiday parks	19	44,361	12,590	2.88	13.20
Total	112	118,234	72,752	2.23	37.27

(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>