



Commercial Accommodation Monitor: November 2018

Hawke's Bay

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Citation

Stats NZ (2019). *Commercial Accommodation Monitor: November 2018– Hawke’s Bay*.
Wellington: Stats NZ.

Published in January 2019 by

Stats NZ
Tatauranga Aotearoa
Wellington, New Zealand

Preface

Commercial Accommodation Monitor: November 2018 – 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).

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 Stats NZ website (www.stats.govt.nz).

The December 2018 monitor will be released on 18 February 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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Stats NZ Information Centre

For help finding and using statistical information available on our website, contact the Information Centre:

Email:	info@stats.govt.nz
Phone toll-free:	0508 525 525
Phone international:	+64 4 931 4600
Fax:	+64 4 931 4610
Post:	P O Box 2922, Wellington 6140, New Zealand
Website:	www.stats.govt.nz

Contact for the Commercial Accommodation Monitor

Zara Darbyshire or Mark Darbyshire
Wellington 04 931 4600
Email: info@stats.govt.nz

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3 Origin of guests

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1 Highlights

Monthly highlights

In November 2018 compared with November 2017:

- Guest nights rose 0.3 percent to 100,655
- International guest nights fell 6.6 percent to 32,053
- Domestic guest nights rose 3.9 percent to 68,602
- The average length of stay fell from 2.19 nights to 2.15 nights
- The overall occupancy rate rose from 49.7 percent to 50.8 percent
- The occupancy rate, excluding holiday parks, was 71.2 percent in November 2018
- Accommodation capacity, excluding holiday parks, fell 9.8 percent.

Response rates for November 2018

The response rate for the Hawke's Bay RTO area was 83 percent for November 2018.

The proportion of the origin-of-guest estimate from unadjusted data was 77 percent.

Figure 1.1

Hawke's Bay RTO Area Monthly Guest Nights

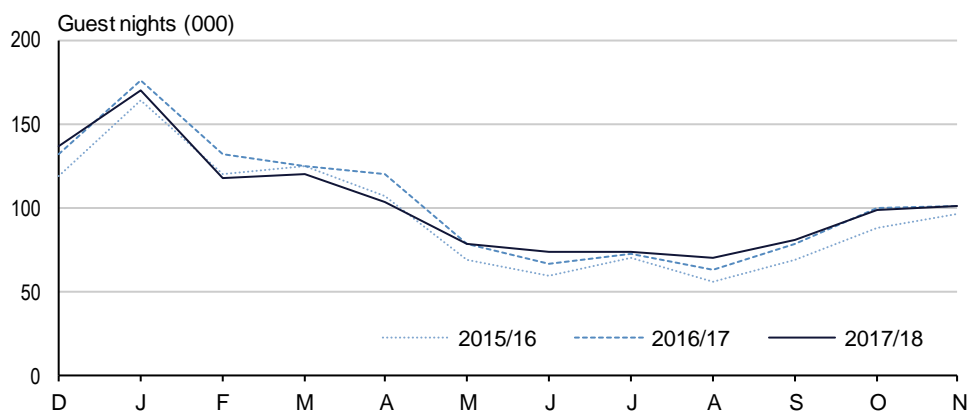
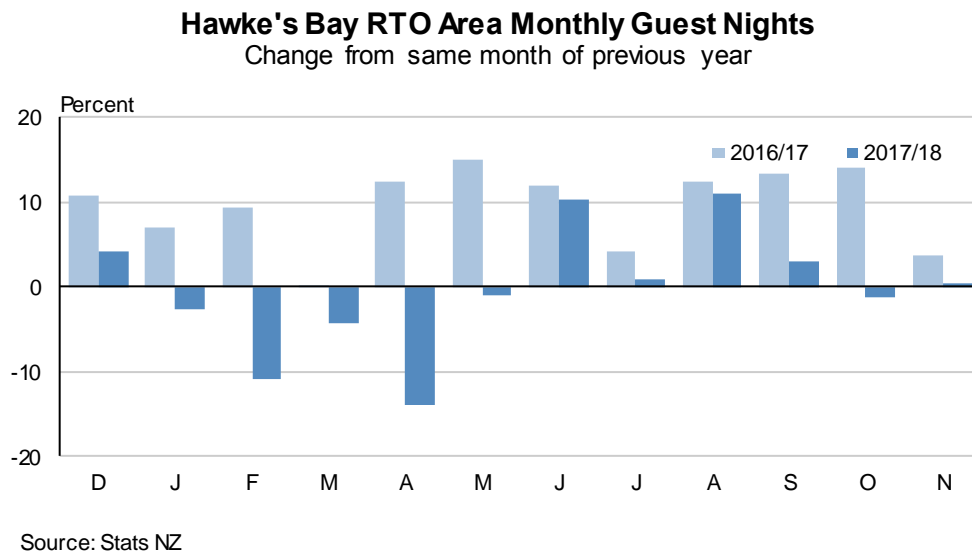


Figure 1.2

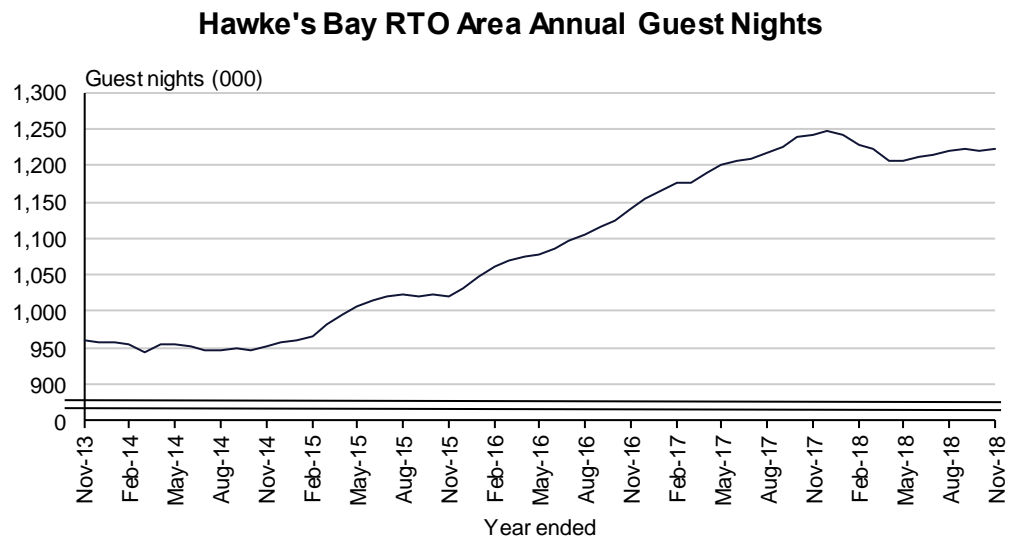


Year ended highlights

For the year ended November 2018 compared with the previous year:

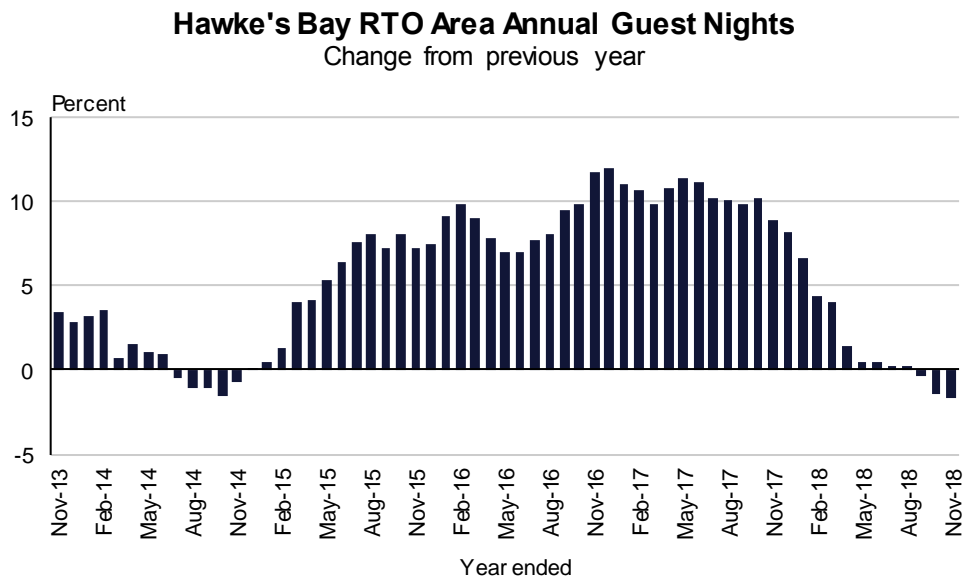
- Guest nights fell 1.7 percent to 1,221,347
- International guest nights fell 4.7 percent to 324,353
- Domestic guest nights fell 0.5 percent to 896,994
- The average length of stay rose from 2.26 nights to 2.29 nights
- The overall occupancy rate rose from 46.2 percent to 47.3 percent
- The occupancy rate, excluding holiday parks, was 62.0 percent for the year ended November 2018
- Accommodation capacity, excluding holiday parks, fell 6.9 percent.

Figure 1.3



Source: Stats NZ

Figure 1.4



Source: Stats NZ

2 Accommodation variables

In November 2018, compared with November 2017, there was an increase of 0.3 percent in total guest nights for the Hawke's Bay RTO area. Holiday parks had the largest increase, followed by motels. Backpackers had the only decrease.

For the year ended November 2018, compared with the previous November year, total guest nights for the Hawke's Bay RTO area decreased 1.7 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⁽¹⁾⁽²⁾*

Accommodation type	Monthly			Annual		
	November		Percentage change	Year ended		Percentage change
	2017	2018		November 2017	November 2018	
Guest nights						
Total guest nights	100,371	100,655	0.3	1,241,901	1,221,347	-1.7
International	34,327	32,053	-6.6	340,450	324,353	-4.7
Domestic	66,045	68,602	3.9	901,451	896,994	-0.5
Hotels	19,497	20,034	2.8	200,556	217,782	8.6
Motels/apartments	43,936	44,994	2.4	585,900	561,580	-4.2
Backpackers	17,274	14,054	-18.6	164,502	138,710	-15.7
Holiday parks	19,664	21,574	9.7	290,943	303,275	4.2
Occupancy rates ⁽³⁾ (%)						
Hotels	73.6	73.6	0.1	63.4	64.6	1.8
Motels/apartments	70.4	73.8	4.8	67.8	69.0	1.9
Backpackers	59.3	63.9	7.9	45.5	47.4	4.2
Holiday parks	19.4	20.6	5.8	24.2	23.6	-2.5
Total	49.7	50.8	2.1	46.2	47.3	2.3
Total excluding holiday parks ⁽⁴⁾	67.6	71.2	5.3	59.8	62.0	3.7
Average length of stay ⁽⁵⁾						
Hotels	1.70	1.72	1.3	1.56	1.71	9.4
Motels/apartments	1.96	1.88	-4.0	2.10	2.11	0.6
Backpackers	4.32	5.29	22.4	4.62	3.60	-22.2
Holiday parks	2.44	2.50	2.4	2.74	3.00	9.8
Total	2.19	2.15	-1.6	2.26	2.29	1.4
Guest arrivals						
Hotels	11,463	11,623	1.4	128,453	127,456	-0.8
Motels/apartments	22,389	23,893	6.7	279,400	266,233	-4.7
Backpackers	3,999	2,658	-33.5	35,571	38,577	8.5
Holiday parks	8,069	8,641	7.1	106,329	100,965	-5.0
Total	45,920	46,816	2.0	549,752	533,230	-3.0
Establishments						
Hotels	18	18	0.0	18	18	0.0
Motels/apartments	66	63	-4.5	66	63	-4.5
Backpackers	14	12	-14.3	14	12	-14.3
Holiday parks	20	21	5.0	20	21	5.0
Total	118	114	-3.4	118	114	-3.4
Capacity ⁽⁶⁾						
Hotels	16,230	16,200	-0.2	188,375	199,110	5.7
Motels/apartments	35,640	34,110	-4.3	449,554	429,552	-4.4
Backpackers	23,760	17,910	-24.6	300,829	245,533	-18.4
Holiday parks	44,640	46,110	3.3	575,449	539,357	-6.3
Total	120,270	114,330	-4.9	1,514,207	1,413,552	-6.6

(1) Reclassifications, new businesses, ceased businesses, and temporary closures may affect figures.

(2) Irregular events, such as airshow s 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 w hen 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 November 2018, international guests accounted for 31.8 percent of all guest nights in the Hawke's Bay RTO area. When compared with November 2017, the number of international guest nights spent in the area in November 2018 was down 6.6 percent to 32,053. Domestic guest nights increased 3.9 percent, to 68,602, for the same period.

The proportion of the origin-of-guest estimate from actual data was 77 percent for November 2018.

Figure 3.1

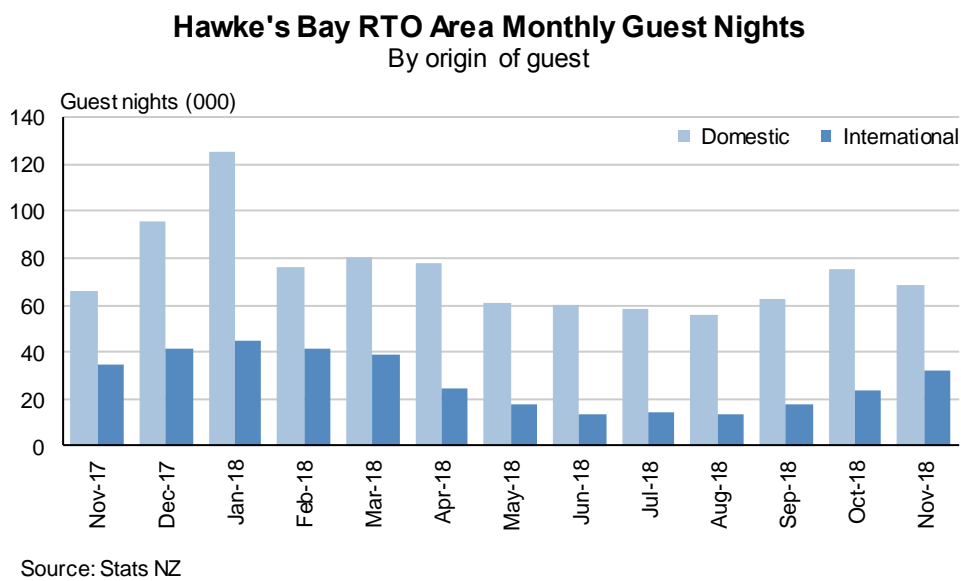


Table 3.1

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

		Hawke's Bay RTO ⁽¹⁾ area			New Zealand		
		Origin of guest		Total	Origin of guest		Total
		Domestic	International		Domestic	International	
Month							
2017	Nov	66,045	34,327	100,371	1,732,137	1,673,546	3,405,683
	Dec	95,474	41,403	136,877	2,215,289	1,926,411	4,141,700
2018	Jan	125,345	44,936	170,281	2,851,307	2,117,813	4,969,120
	Feb	75,762	41,693	117,455	1,938,307	2,092,637	4,030,944
	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
		Percent change from the current month of the previous year					
		3.9	-6.6	0.3	4.2	3.4	3.8
Year ended							
November 2017		901,451	340,450	1,241,901	22,179,367	17,126,694	39,306,061
November 2018		896,994	324,353	1,221,347	22,703,390	17,606,722	40,310,112
		Percent change from previous year					
		-0.5	-4.7	-1.7	2.4	2.8	2.6

(1) Regional tourism organisation

4 National results

In November 2018, a total of 3,535,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 129,000 nights (3.8 percent) from November 2017. Both the North Island (up 43,000 or 2.2 percent) and South Island (up 86,000 or 6.1 percent) recorded an increase.

All four accommodation types recorded an increase in guest nights in November 2018, compared with November 2017. Hotels had the largest increase in guest nights (up 58,000 or 4.6 percent), followed by holiday parks (up 42,000 or 7.2 percent), motels (up 29,000 or 2.7 percent), and backpackers (up 1,000 or 0.1 percent).

For the year ended November 2018, there were 40,310,000 guest nights, an increase of 1,004,000 (2.55 percent) from the previous November year.

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	
	2016	2017	2018	2016 to 2017	2017 to 2018
November month					
Hawke's Bay RTO area					
Hotels	16,346	19,497	20,034	19.3	2.8
Motels	49,868	43,936	44,994	-11.9	2.4
Backpackers	15,056	17,274	14,054	14.7	-18.6
Holiday parks	15,446	19,664	21,574	27.3	9.7
Total	96,716	100,371	100,655	3.8	0.3
New Zealand					
Hotels	1,192,202	1,242,438	1,300,029	4.2	4.6
Motels	1,061,386	1,079,835	1,108,936	1.7	2.7
Backpackers	461,411	495,239	495,862	7.3	0.1
Holiday parks	550,113	588,171	630,280	6.9	7.2
Total	3,265,113	3,405,683	3,535,107	4.3	3.8
Year ended November					
Hawke's Bay RTO area					
Hotels	173,113	200,556	217,782	15.9	8.6
Motels	576,156	585,900	561,580	1.7	-4.2
Backpackers	154,623	164,502	138,710	6.4	-15.7
Holiday parks	236,519	290,943	303,275	23.0	4.2
Total	1,140,411	1,241,901	1,221,347	8.9	-1.7
New Zealand					
Hotels	13,578,684	13,866,631	14,417,527	2.1	4.0
Motels	12,073,813	12,349,572	12,464,385	2.3	0.9
Backpackers	5,155,700	5,205,231	5,084,955	1.0	-2.3
Holiday parks	7,561,239	7,884,627	8,343,245	4.3	5.8
Total	38,369,437	39,306,061	40,310,112	2.4	2.6

5 Regional comparison

In November 2018, Auckland recorded the largest increase in guest nights (up 36,000 or 5.4 percent) from November 2017. This was followed by Queenstown (up 31,000 or 10.4 percent), Canterbury (up 28,000 or 8.4 percent), Wanaka (up 10,000 or 13.8 percent), and Mackenzie (up 9,000 or 12.2 percent).

Nelson-Tasman recorded the largest decrease (down 7,000 or 5.5 percent), followed by Hurunui (down 4,000 or 12.9 percent), Bay of Plenty (down 3,000 or 3.6 percent), Waikato (down 3,000 or 2.5 percent), and Gisborne (down 3,000 or 8.7 percent).

Table 5.1

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

RTO area	November guest nights								
	Domestic			International			Total		
	2017	2018	Percent age change	2017	2018	Percent age change	2017	2018	Percent age change
Northland	81,031	89,919	11.0	69,715	64,612	-7.3	150,746	154,530	2.5
Auckland	328,045	358,680	9.3	331,848	336,928	1.5	659,894	695,608	5.4
Coromandel	45,716	43,872	-4.0	29,605	29,350	-0.9	75,320	73,223	-2.8
Waikato	87,262	88,309	1.2	39,447	35,173	-10.8	126,708	123,482	-2.5
Bay of Plenty	61,131	59,460	-2.7	33,242	31,518	-5.2	94,373	90,977	-3.6
Rotorua	91,344	96,691	5.9	113,282	107,681	-4.9	204,626	204,371	-0.1
Taupo	55,349	53,043	-4.2	40,432	40,220	-0.5	95,781	93,263	-2.6
Whakatane-Kawerau	14,215	15,137	6.5	5,592	5,920	5.9	19,808	21,057	6.3
Gisborne	22,933	21,822	-4.8	6,109	4,695	-23.1	29,042	26,517	-8.7
Taranaki	42,311	44,034	4.1	12,518	10,764	-14.0	54,829	54,798	-0.1
Hawke's Bay	66,045	68,602	3.9	34,327	32,053	-6.6	100,371	100,655	0.3
Ruapehu	18,141	21,234	17.0	18,235	19,259	5.6	36,376	40,492	11.3
Manawatu	35,912	41,724	16.2	8,080	6,673	-17.4	43,991	48,397	10.0
Whanganui	12,178	13,308	9.3	4,212	5,155	22.4	16,390	18,463	12.7
Wairarapa	14,122	18,637	32.0	4,322	3,267	-24.4	18,444	21,904	18.8
Kapiti-Horowhenua	16,461	18,854	14.5	3,546	4,450	25.5	20,007	23,304	16.5
Wellington	152,085	157,566	3.6	89,803	83,130	-7.4	241,888	240,695	-0.5
Marlborough	33,942	35,472	4.5	32,199	29,538	-8.3	66,141	65,011	-1.7
Nelson-Tasman	60,568	60,025	-0.9	60,736	54,653	-10.0	121,303	114,678	-5.5
Canterbury	171,966	163,553	-4.9	157,386	193,434	22.9	329,353	356,986	8.4
Hurunui	20,064	16,934	-15.6	11,482	10,553	-8.1	31,546	27,488	-12.9
Mackenzie	18,723	18,008	-3.8	54,416	64,074	17.7	73,139	82,082	12.2
Timaru	17,830	17,889	0.3	8,145	8,784	7.8	25,976	26,673	2.7
West Coast	39,445	37,595	-4.7	97,331	102,538	5.3	136,776	140,133	2.5
Wanaka	23,382	24,045	2.8	47,078	56,136	19.2	70,460	80,181	13.8
Queenstown	80,258	96,305	20.0	221,621	236,851	6.9	301,879	333,156	10.4
Waitaki	17,547	17,534	-0.1	17,192	20,331	18.3	34,740	37,866	9.0
Central Otago	15,598	16,811	7.8	5,374	7,187	33.7	20,972	23,998	14.4
Dunedin	42,267	47,152	11.6	39,122	37,021	-5.4	81,389	84,173	3.4
Clutha	3,918	4,308	10.0	2,596	3,424	31.9	6,514	7,733	18.7
Fiordland	17,845	15,747	-11.8	59,084	66,798	13.1	76,929	82,545	7.3
Southland	24,505	22,670	-7.5	15,468	17,995	16.3	39,973	40,665	1.7
Total	1,732,137	1,804,941	4.2	1,673,546	1,730,166	3.4	3,405,683	3,535,107	3.8

Table 5.2

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

RTO area	November 2018 occupancy rate					
	Accommodation type					Total excluding holiday parks ⁽²⁾
	Hotels	Motels	Backpackers	Holiday parks	Total	
	Percent					
Northland	53.9	63.4	44.8	15.9	31.1	55.0
Auckland	88.6	74.6	70.9	22.2	74.5	81.6
Coromandel	51.9	51.2	32.0	18.0	25.6	43.3
Waikato	71.6	71.8	43.7	18.6	47.6	64.7
Bay of Plenty	58.5	62.1	52.1	21.9	39.5	57.4
Rotorua	84.1	74.2	36.4	28.9	55.8	63.1
Taupo	63.0	61.1	48.4	21.5	45.5	56.6
Whakatane-Kawerau	C	61.5	C	10.0	20.6	55.6
Gisborne	C	64.8	C	7.8	24.0	59.1
Taranaki	58.2	62.0	37.2	18.0	40.7	55.7
Hawke's Bay	73.6	73.8	63.9	20.6	50.8	71.2
Ruapehu	52.2	39.7	23.3	36.1	34.4	34.1
Manawatu	46.2	64.0	C	C	43.8	C
Whanganui	C	59.4	59.3	C	39.1	C
Wairarapa	C	59.4	C	14.3	30.7	53.3
Kapiti-Horowhenua	C	67.0	C	17.6	24.3	31.8
Wellington	85.4	78.7	C	C	72.9	C
Marlborough	60.1	69.7	40.7	24.3	44.0	56.9
Nelson-Tasman	60.7	64.4	53.5	14.4	34.9	59.0
Canterbury	77.5	72.2	44.5	23.8	51.5	65.0
Hurunui	C	49.0	C	18.9	29.8	39.2
Mackenzie	C	62.1	C	41.5	63.2	74.3
Timaru	C	66.9	C	20.8	36.8	58.9
West Coast	58.1	66.7	41.7	31.0	48.2	55.2
Wanaka	73.0	81.4	76.6	25.9	49.6	76.6
Queenstown	86.3	71.6	76.5	43.3	75.2	80.2
Waitaki	52.4	70.3	35.4	5.6	16.0	57.4
Central Otago	25.0	67.3	22.7	6.9	15.5	41.8
Dunedin	73.7	75.9	42.5	35.8	61.0	67.6
Clutha	C	52.8	C	21.1	29.1	36.7
Fiordland	74.3	75.8	56.0	47.6	60.0	67.1
Southland	44.5	58.4	39.2	20.9	39.9	48.4
Total	77.0	68.1	51.0	19.7	49.3	66.2

(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	November 2018 results				
	Establish-ments	Capacity	Guest Nights	Average stay length	Occupancy rate
	Number			Days	Percent
Hastings District					
Hotels	5	2,760	C	C	C
Motels	32	12,990	16,166	2.06	67.65
Backpackers	4	5,940	C	C	C
Holiday parks	10	19,590	6,451	2.03	15.40
Total	51	41,280	31,176	2.26	43.03
Napier City					
Hotels	9	11,670	15,948	1.74	80.21
Motels	26	18,840	26,167	1.77	78.55
Backpackers	7	11,550	8,953	4.48	65.91
Holiday parks	5	16,020	12,090	3.35	31.35
Total	47	58,080	63,158	2.14	63.35
Wairoa and Central Hawke's Bay Districts					
Hotels	4	1,770	C	C	C
Motels	5	2,280	2,660	2.11	69.47
Backpackers	1	420	C	C	C
Holiday parks	6	10,500	3,033	1.64	13.68
Total	16	14,970	6,322	1.81	23.18
Hawke's Bay Regional Tourism Organisation area					
Hotels	18	16,200	20,034	1.72	73.64
Motels	63	34,110	44,994	1.88	73.79
Backpackers	12	17,910	14,054	5.29	63.94
Holiday parks	21	46,110	21,574	2.50	20.55
Total	114	114,330	100,655	2.15	50.76

(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 http://www.stats.govt.nz/browse_for_stats/industry_sectors/accommodation.aspx