MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT
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UNCLASSIFIED

Accommodation Survey Review

Consultation Paper

August 2014

Contents

Summary

The review

The Ministry of Business, Innovation and Employment (MBIE), in conjunction with Statistics New Zealand, is reviewing the Accommodation Survey (also known as the Commercial Accommodation Monitor (CAM)). This paper outlines the review process, its objectives, analysis of stakeholder feedback so far, how the survey is currently used and options for change.

The review's purpose is to reduce the respondent load of the survey and improve the use and reliability of data provided.

Initial stakeholder feedback has emphasised the importance of the Accommodation Survey data in their everyday business, and this is understood by MBIE and Statistics New Zealand. At this stage of the review we are not seeking further feedback on *why* the data is important, we want to focus feedback on *how* we can make the survey/data better, make the survey more efficient for respondents, maximise the use of existing data sources and minimise load.

Options for change

The following options for change have been identified and are outlined in further detail in this paper:

Option	Reduce respondent load	Improve use and reliability of data
Sampling methods - move from a full coverage census to a sample. The impact on respondent load will vary depending on sample design (i.e. whether it's designed on region/RTO, accommodation type or both). An option within surveying to enhance the data is to use modelling techniques to apportion data to fit a representative population. For example, GST and other available administrative data (e.g. RTIs) could be used to model guest nights. Pros: Reduces respondent load. Cost effective to survey fewer enterprises (i.e. best practice statistical collection in this day and age). Modelling creates efficiencies in data collection. Users could gain valuable insight from other data sources (i.e. modelling data sources) alongside the normal accommodation data, for example GST and employment statistics. Cons: the more the sample size is reduced (from a full coverage) , the greater the margins of error in data at the disaggregated levels (i.e. regional and accommodation type)	✓✓✓	✓
Reduce frequency of the survey This option comes under 'sampling methods', in that it would reduce the frequency of the survey from monthly to quarterly or annual. Administrative data could be used to model the middle months' data (if it is monthly data that is wanted). Some of the current variables in the survey could be collected less frequently than monthly (e.g. capacity), meaning enterprises would not have to fill in these details on the survey every month (as is current practice). Pros: Reduce respondent and collection load (would eliminating a few 'inputs' from the current survey format really reduce respondent load?)	✓	

Option	Reduce respondent load	Improve use and reliability of data
Cons: Depending on how accurate the modelling is, reliability at the more frequent level (e.g. monthly) level could be reduced.		
Electronic collection methods for data collection, e.g. an online portal for respondents to complete survey Pros: Reduces respondent load going from paper based form to an online portal. Reduces collection load. Cons: Still relies on users submitting accurate data, 'data that goes in comes out'.	✓	
Use of **private administrative data such as Property Management Systems** (PMS). There is a wide range of PMS that individual accommodation providers currently use. Collecting data this way would require agreement from both the individual enterprises and PMS to provide data to Statistics New Zealand for survey purposes; as well as ensuring a representative sample of PMS were chosen for the commercial accommodation sector. Pros: Streamlines businesses' current systems, from a business perspective they won't have to do any additional 'work' to complete the survey. Potential for more reliable data as it corresponds to businesses' current systems that they use on a day-to-day basis. Potential for additional PMS data to be mapped to current CAM data? Cons: This options needs feasibility work to ascertain if it is possible to gather representative data via PMS, and at what cost.	✓ ✓	✓ ✓
Ad-hoc studies, e.g. on holiday homes, to help with incomplete coverage where demand for data is high. Pros: Responds to stakeholder needs, given demand for data in this area is high. Cons: Extra cost to carry out ad-hoc studies. Certain sectors (e.g. holiday homes) are not within Statistics New Zealand's Business Frame so cannot be surveyed via Statistics New Zealand surveying methods.		✓
Dissemination and presentational improvements, such as improving the website links to where data is currently stored on MBIE and Statistics New Zealand websites; more graphical and geographical presentation of data; better explanation and/or presentation of seasonally adjusted data in light of the various audiences. Pros: responds to user needs for better presentation and dissemination of data, thereby improving use of data. Removes duplication where necessary. Cons: Staff resources needed to carry out improvements.		✓ ✓

Submission process

This paper has been written after initial consultation with key stakeholders (RTOs, the Accommodation Forum, TIA, TNZ and relevant MBIE policy teams), and their feedback has been incorporated in this paper.

Your views are important to us. Please send any feedback you have to TR_SharedMailbox@mbie.govt.nz **by 31 August 2014**, with the subject line 'Accommodation Survey review'. As part of your submission, it would helpful if you could provide feedback on any of the following areas on which you have views or information:

1. **Reducing respondent load**
    a. How feasible would it be for individual businesses to submit data electronically via a secure online portal, managed by Statistics New Zealand? Would it save respondent's time?
    b. What Property Management Systems (PMS) do New Zealand businesses currently use and how representative are they of the whole accommodation sector? How reliable is the PMS data?
    c. Would individual businesses be happy for their PMS to submit data on their behalf to Statistics New Zealand if they saw that it could save them time?

2. **Sampling and modelling**
    a. Instead of carrying out a 'full count' census on all 3,300 accommodation businesses currently within Statistics New Zealand's business frame (i.e. current practice), this review currently proposes to sample only a proportion of businesses. There is also the option to use modelling techniques using administrative data (e.g. GST) to ensure the data from the sample represents the whole population. Do you have any specific feedback on this?

3. **Sector coverage**
    a. What areas of coverage are currently incomplete (e.g. holiday homes), where you would like a better understanding of the dynamics?

4. **Regional coverage**
    a. The CAM currently provides data at three levels: Regional Council, RTO and TA level. How would it impact on you if the data were provided at just the Regional Council and/or RTO levels and not TA levels?

5. **Dissemination and presentation**
    a. What would be useful for you in terms of how you receive the data and what is presented?

Next steps

MBIE will collate submissions by end of August 2014, and review all feedback. During August and September, we will further investigate the options for change. Recommendations will be developed by late 2014 and a second round of consultation will happen with key stakeholders on these (i.e. RTONZ, Accommodation Forum, TIA and TNZ). By the end of 2014, we will sign off on agreed recommendations and the design and development of changes will be implemented from 2015 onwards.

Purpose

The Ministry of Business, Innovation & Employment (MBIE), in conjunction with Statistics New Zealand is carrying out a review of the Accommodation Survey, also known as the Commercial Accommodation Survey (CAM).

This review fulfils one of the recommendations of the 2011 Tourism Data Domain Plan (TDDP):

> *"Review the Accommodation Survey in conjunction with the accommodation sector associations to reduce the respondent load of CAM data and improve its use and reliability". Information needs for the accommodation sector are also to be addressed as part of this.*

This consultation paper has been written after initial consultation with key stakeholders (RTOs, Accommodation Forum, TIA, TNZ and MBIE policy teams). This paper includes initial analysis of stakeholder feedback so far, and provides further opportunity for the sector to submit feedback on the future of the Accommodation Survey.

Following this paper, MBIE and Statistics New Zealand will prepare recommendations outlining proposed changes to the current survey. It is expected that changes will be made to the current format. Design and development of changes to the survey will take place after this review (i.e. 2015 onwards). The timing of changes will very much depend upon the nature and scale of the proposed changes.

Timeframes

First round of consultations	June/July 2014
Consultation paper on MBIE website	August 2014
Review feedback from consultation paper. Further investigate alternative methods for data needs	September 2014
Develop recommendations	October/November 2014
Design and development of changes	2015 onwards

Objectives

The following objectives are being considered as part of this review:

What accommodation data needs are there?

During the Tourism Data Domain Plan process in 2011, it was established that the Accommodation Survey was widely used by the sector. For a long time, it was the only reliable source of regional data on accommodation and regional tourism as a whole. It is therefore timely to assess the current need for accommodation data, in light of the development of Regional Tourism Indicators (RTIs) and Regional Tourism Estimates (RTEs) in 2012 and 2013 for meeting regional data needs.

How important is it for the sector to have accommodation data that enables them to measure the 'health' of the accommodation sector, and what would this data be? How important is it for stakeholders to have access to reliable regional data to measure activity at a regional level?

How is survey data used?

The original purpose and design of the accommodation survey was to measure supply and demand of commercial short-term accommodation (less than one month). The survey is also used as a measure of regional tourism activity as it was for a long time the only reliable source of information at the subnational level.

Initial stakeholder consultation has shown that CAM data is mainly used as a reliable and timely source of visitor activity at a *regional* level. Understanding performance across accommodation types is also very useful for accommodation associations to understand performance in their sectors.

The CAM is the only comprehensive volume indicator of visitors across regions. The Regional Tourism Indicators (RTIs) and Regional Tourism Estimates (RTEs) provide a rich source of regional activity (electronic card spend and number of transactions) for the sector across industry groups, including accommodation. Feedback on this relatively new data source has been extremely positive in providing a useful tool for the sector to monitor regional performance and better understand its characteristics (visitor market and industry group trends). However, for the accommodation sector, the RTI data is relatively un-representative as it only includes 'card present' data, and much of accommodation is prepaid, booked online or from corporate bookings – none of which are included in the RTI data.

Industry have emphasised the importance of CAM data in providing a reliable volume statistic (i.e. guest nights) for regions. CAM's 'bums on seats' data is critical in helping industry understand performance in their sector or region, setting goals for that performance (e.g. increasing length of stay), and communicating with wider audiences (e.g. local government).

In summary, CAM and RTIs have proved to be working very well in conjunction with each other to provide informed views of performance at a regional level.

See Annex 1 for examples of CAM analysis from data that is published currently.

Is the survey currently 'fit for purpose'?

Feedback so far on the CAM's 'fit for purpose' shows the following:

- Target population: The target population currently excludes some accommodation sectors that are considered important for the visitor industry, e.g. holiday homes, luxury accommodation, and hosted accommodation (which were previously taken out of the survey due to the high respondent load of the survey and relatively low impact to the data).

Stakeholder feedback has indicated the need to have a better understanding of visitor demand for holiday homes.

- Frequency: preference is to retain the monthly frequency of data to align with other indicators of tourism activity (e.g. RTIs).

- Other uses for the survey over and above its current main uses: e.g. information on health of the accommodation sector, inputs into other surveys and/or National Accounts, inputs into policy development.

- Disaggregation: understanding what break down of data is important for various user groups. Stakeholder feedback so far has emphasised the importance of a reliable regional break down of the data, as well as accommodation type. Users would prefer if nationality/origin could be further broken down than just international /domestic, even if it could just split Australia and other within international origin.

Background

Survey background

The Accommodation Survey was first established in 1996 to collect data on the supply and demand of commercial short-term accommodation (less than one month). The survey is conducted monthly and is compulsory for GST-registered commercial accommodation with an annual turnover of $30,000 or greater. The survey is a census and about 3,300 units are selected each year.

Funding

The survey is funded by MBIE and administered by Statistics New Zealand. In 2013/14, MBIE contributed $520,000 to its cost of operation. It is the most expensive tourism survey that MBIE funds. Statistics New Zealand has indicated $520,000 is lower than its true cost of administration. Most of Statistics New Zealand's surveys have been redesigned, incorporating more administrative data, and creating greater cost-efficiencies with minimal change in data quality. Adopting Statistics New Zealand's redesign techniques, there is significant potential to improve the cost effectiveness of the Accommodation Survey, without losing valuable insight from it.

Data collected

Key information collected through the survey is monthly data on:

- Guest nights (split by domestic/ international/ don't know /totals)
- Guest arrivals
- Stay-unit nights (occupancy)
- Total stay units available (capacity)

Statistics derived from these survey inputs are:

- number of establishments (monthly, by region or accommodation type)
- average length of stay by accommodation type/region
- guests per stay-unit night/occupancy
- Occupancy rates
- stay-units per establishment
- guest nights as a proportion of January guest nights

Data can be disaggregated by[1]:

- Regional Council
- Territorial Authority (TA)
- Regional Tourism Organisation (RTO)
- Accommodation type (hotels, motels, backpackers, holiday parks)

Respondent and collection load

The survey currently has high respondent load. On average, an individual business spends 3.2 hours per year completing the survey. Across 3,800 potential establishments that complete the survey each year, this is considered a very high respondent load.

Collection load is also high. For data capture alone, Statistics New Zealand employs five full time equivalents (FTEs) for a two week period, every month. Data cleansing and processing is done by an additional one FTE; and output/ publication work requires at least one more FTE equivalent.

These resource loads are high in comparison to collection loads for other Statistics New Zealand surveys.

The accommodation survey is unique in terms of its frequency and coverage being a monthly census of the target accommodation sector. Steps have been taken to reduce respondent load in the past through discontinuing the collection of country of origin information (retaining only a domestic and international split), and the removal of hosted establishments. Collection methods have also widened to allow the use of administrative data from trade groups such as the Tourism Industry Association (TIA) Hotel Sector (formerly the New Zealand Hotel Council (NZHC)).

Linkages to other outputs

Currently the Accommodation Survey is used in the compilation of the Tourism Satellite Account (TSA) but mainly as a data confrontation tool (i.e. a tool to check the validity of TSA data). There is potential to link dissemination of the Accommodation Survey to other outputs, such as MBIE's Regional Tourism Summaries.

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[1] Not all data can be disaggregated at the lowest level for region and accommodation type, the data needs a minimum number of establishments to ensure anonymity in the data.

Stakeholder feedback so far

As part of initial consultation, MBIE and Statistics New Zealand had meetings with RTOs, the Accommodation Forum, TIA, TNZ and MBIE Policy teams. The following key themes have emerged:

Importance of regional information

The CAM used to be considered the only reliable and timely source of visitor activity at a regional level across all of New Zealand. The launch of the Regional Tourism Indicators (RTIs) in 2012, and Regional Tourism Estimates (RTEs) in 2013, have provided additional measures of regional tourism activity and sector performance (e.g. accommodation), at very disaggregated levels (e.g. by Territorial Authority). For reporting on sector or regional disaggregation, the RTIs are far superior to survey methods, and discrepancies between the RTIs and surveys are nearly always explained by random chance in survey sampling. However, the RTIs only report on electronic 'card present' data, and for the case of the accommodation sector, much of it is pre-booked via online methods or corporate bookings, which are not included in the RTI data. Therefore, the CAM is still unique in that it is the only comprehensive sub-national volume indicator of visitor activity in the accommodation sector across regions.

Timeliness of data

Different data sets take variable lengths of time to collect, collate and disseminate. The CAM is disseminated approximately 1-2 months after collection. Timeliness of dissemination is important in assisting regions and sectors monitor their performance as close as possible to actual events that occur.

Data that is efficient to collect and clean; and dissemination that has automated processes helps keep timeframes to dissemination as short as possible. The RTIs, for example, use administrative data (electronic card transactions) and, in as much as possible, automated processes for checking and dissemination. The RTIs are disseminated to industry only 20 or so days after collection. Feedback from industry on their timeliness has been very positive.

Respondent load

Respondent load for CAM is currently very high, compared with many other surveys of its extent and value. In an age of advanced technology and increased electronic administrative systems, it is timely to review how CAM data is collected and 'modernise' the collection process for CAM, thereby reducing the load on individual businesses.

Streamlining collection with current systems already in place for the accommodation sector (e.g. their own Property Management Systems, or other electronic modes of collection) would help individual businesses reduce the load taken to complete the survey, and hopefully improve accuracy and reliability of the data collected as it would just rely on current systems already in place that businesses already use to report with.

Dissemination and presentation of data

Tourism industry stakeholders have reported dissatisfaction with the use of seasonally adjusted estimates for presenting CAM data. Although seasonal adjustment is a routine process performed on official statistics (and makes the data for adjacent months more comparable if considering underlying long term trends), the industry have said they find it confusing as it is not what they are used to looking at with regard to their own performance. Industry prefer to view the data short-term - i.e. actual trends in time (based on fluctuations such as events), and month-on-month comparisons

to the previous year. However, this form of comparison delays the identification of specific turning points in trends.

A recommendation of this review could look at the varying needs of different stakeholder groups (e.g. policy makers vs. economists vs. tourism industry), and explore the way data is presented to these groups.

The data is currently presented on both MBIE and Statistics New Zealand websites. Monthly statistics are reported via key fact sheets and data tables, detailed pivot tables, and regional (RTO) summary reports. Stakeholders have asked for more graphical and geographic presentation of data.

Coverage of sector

The diagram below illustrates the groups that are currently captured by CAM and those that are not. The light blue bubble shows providers that are currently captured in the CAM; the dark blue bubbles indicate those that are *not* captured in the CAM yet are considered commercial accommodation providers; and lastly, the rectangular 'non-tourism accommodation' bubble shows those that are *not* captured in CAM and may or may not be considered commercial accommodation providers.

Figure: Accommodation sectors that are in and out of CAM scope
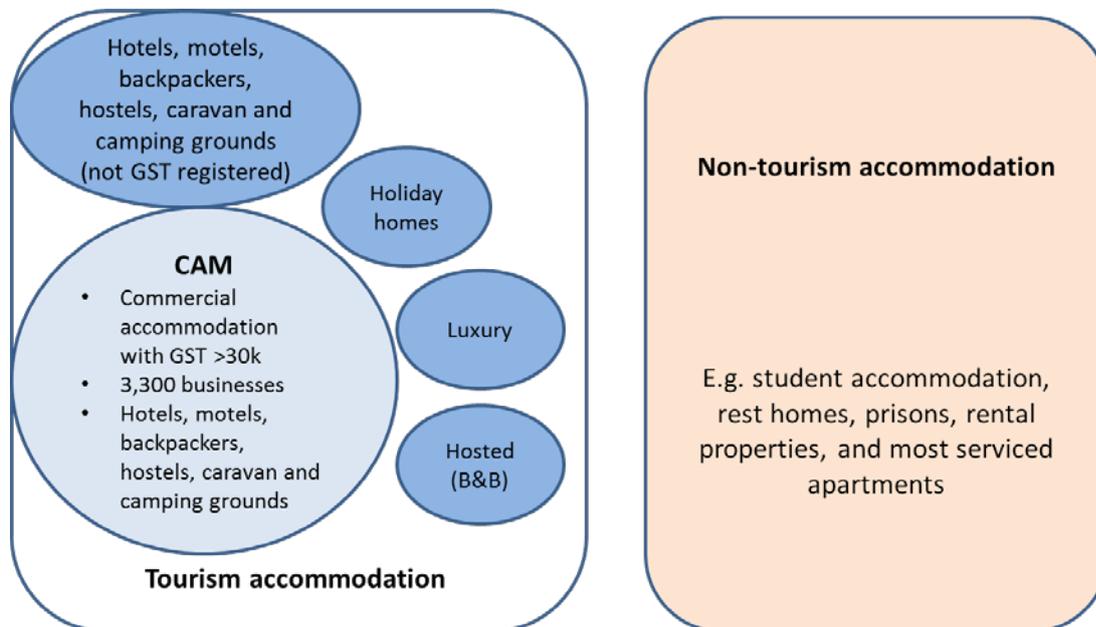
The survey does not capture a number of accommodation categories including most serviced apartments and holiday homes. In 2009, 'hosted' accommodation (such as 'bed & breakfast' establishments) was removed from the survey. The survey does not capture smaller establishments that are not GST registered.

In light of the already heavy burden and cost of the current survey, it is infeasible to explore widening coverage of the current survey – there is potential to explore other sources of data to meet these coverage needs.

For example, 'holiday homes' is a growing sector for tourism demand and yet this sector is not captured in official statistics. 'Holiday homes' are not part of Statistics New Zealand's Business Frame (unless they are of course GST registered and come under an ANZSIC-relevant category, which is highly unlikely for most of them). Therefore they are out of scope for official survey capture. This review could seek data to better understand the supply and demand characteristics of holiday homes.

Origin of guest nights

Feedback to date has emphasised the usefulness of having a domestic/international split of guest nights. In the past, international market was further disaggregated by actual origin market but this was discontinued after October 2007, to reduce respondent load and also because the data was found to be unreliable.

Current use of accommodation survey

Stakeholder feedback has emphasised the following as being key ways the CAM is currently used:

- Understanding the **'health' of the accommodation sector** – e.g. comparing occupancy rates across accommodation types
- Usefulness as a **volume** 'bums on seats' statistic – CAM is the only source of visitor guest nights in region (RTI transaction data is not a reliable enough predictor of volume characteristics in region)
- **Understanding trends in performance**
- Monitoring and **benchmarking** performance against others (e.g. accommodation types, regions)
- **Market share**
- **KPIs** in annual reports (RTOs), KPIs for i-SITES
- Currently the only reliable source for tracking **domestic tourism** performance
- **Understanding trends in visitor patterns**
- Overall trends in international vs. domestic tourism and types of places they stay in and regions they go to
- **Regional analysis** – to measure performance (e.g. impact of event) and regional trends
- **Feasibility studies, due diligence and scenario analysis**. E.g. on new product/expansion of product (e.g. new conference centre); predict demand projections based on past scenarios
- **Planning for capacity** (e.g. working out where options for capacity might exist during specific events)
- Responding to **media queries** (usually region-specific)
- **Lobbying local government** for funding (RTOs)
- **Specific ad-hoc analysis,** e.g. analysis of Canterbury earthquake recovery progress
- High level **national stats** (e.g. contribute to 'state of industry' reporting, reporting to ministers on accommodation sector, reporting on trends in visitor volume and behaviour)
- CAM is used as a **data confrontation tool** for the TSA (to check validity of TSA data). MBIE also used the CAM to help validate the RTIs when they were developed.

Potential use of current accommodation data available to industry

The table below shows a list of accommodation data that is currently provided to the sector.

Data source	Frequency and timeliness	What's provided	Potential use (not inclusive)
Government data			
Accommodation Survey (aka Commercial Accommodation Monitor (CAM))	Monthly. Around 11th of the month, approximately 1.5 months after collection.	Survey data on guest nights, guest origin (domestic/international), occupancy, capacity, number of establishments, average stay by accommodation type. Split by region (regional council, RTO, TA); and accommodation type (hotels, motels, backpackers, holiday parks)	As described in section above
Regional Tourism Indicators (RTIs)	Monthly. Around 20 days after collection.	Administrative data. Change in level of electronic card spend (indexes) of domestic and internationals. Split by detailed region (RTO, TA); origin (domestic TA/RTO or international visitor market); and ANZSIC group	Monitoring and benchmarking regional performance, impact of events, economic contribution of tourism to region across sectors. RTIs transaction count data provides an indicative 'actual volume' statistic. Industry groupings include one for 'Accommodation'. However, spend/transactions are only 'card present' and exclude Corporates, so not fully representative of accommodation sector as a whole (as much of it is pre-paid online or corporate bookings).
Regional	Annual, after the release of	Absolute $ estimates of expenditure at detailed regional	Reliable regional statistics on expenditure,

Data source	Frequency and timeliness	What's provided	Potential use (not inclusive)
Tourism Estimates (RTEs)	TSA, usually in November	level (TA, RTOs, and visitor's international origin market), and sector level (ANZSIC). RTI data is calibrated to IVS (international) and TSA (domestic).	broken down by type (domestic or international), industry sector and regions.
Regional Economic Activity Report (REAR)	Annual	A report with comprehensive data and insight on New Zealand's 16 regions. An interactive web tool, providing more detailed information on sub-regional economies. It contains information on regional tourism products, including the accommodation sector. See Annex 1 under 'Ad hoc analysis on existing accommodation data' for more detailed information on REAR.	The report provides infographics and commentary on specific regions that are useful to tourism stakeholders. The web tool provides charts, maps and other infographics not included in the published report. It offers greater flexibility and allows users to pick and combine variables for specific purposes. The web tool is available online or can be accessed on the go, through an offline version for tablets.
Tourism Satellite Account (TSA)	Annual, October. For current YEMar	Tourism's contribution to NZ economy in terms of expenditure and employment	
Business Demographic Statistics	Annual	Snapshot of structure and characteristics of New Zealand businesses. Includes number of enterprises, employees, geographic units. The accommodation sector is covered by 'Accommodation and Food Services', which consists of ANZSIC groups 4400 (Accommodation) + 4520 (Pubs, Taverns, and Bars)	

Data source	Frequency and timeliness	What's provided	Potential use (not inclusive)
Annual Enterprise Survey	Annual. August. For previous years' financial year results (e.g. in Aug 2013 they released 2011/12 FY results)	Stats on financial performance and position of businesses operating in New Zealand, covering most areas of economic activity Accomm sector covered by ANZSIC 4400	Trends in financial performance of accommodation industry. Investment of fixed assets in accommodation.
Industry data			
Tourism Industry Association (TIA) Hotels data	Monthly, provided 3-4 days after collection. Access for TIA Hotels members only. Data is collated by The Fresh Information Company on behalf of TIA Hotels. The information is submitted by TIA Hotels members within the first 3 days of the month for the previous months results.	Occupancy, average daily rate, and RevPAR – by 3, 3.5, 4, 4.5 and 5 star hotels. Split by regions: Auckland, Central Park, Christchurch, Dunedin, Nelson/Marlborough, Queenstown, Rotorua, Wellington. Average room rates and share of room nights are split by market segment (C&I, Corporate, FIT, Tours, Crew, Other) and share of guest nights is split by origin market.	
Holiday Park Association of NZ (HPANZ)	Biennial and ad-hoc research	Biennial: Expenditure and behaviour research. Survey on holiday park guests including data on key demographics, group size/composition, length of stay, mode of transport, country/region of origin, detailed expenditure behaviour. Ad-hoc research on repeat visitation (2014) to assist HPANZ with addressing seasonality.	For holiday parks to better understand the profile and expenditure behaviour of peak season holiday park visitors and economic contribution. Leverage opportunities for growing the shoulder and low season domestic market for holiday parks.

Options for change

To reduce the respondent load, we have identified the following options:

Introduce sampling methods

These options consist of moving from surveying all accommodation providers (a full coverage, as is the current model) to surveying some accommodation providers (a sample survey). Currently, Statistics New Zealand survey around 3,300 accommodation businesses every month – these are commercial accommodation businesses that are identified within Statistics New Zealand's business frame.

Sampling methods are used to select a subset of respondents from within a whole statistical population, to estimate characteristics of the whole population. In survey sampling, weights can be applied to the data to adjust for the sample design.

RTO/region and/or Accommodation Type could be used as the main variable in the design of the survey – there are varying consequences on respondent load, sample size, and reliability of data with each permutation of sample design, which need to be taken into account. In each of these options below, a monthly frequency of surveying is assumed.

Survey design based on Region/RTO

This could reduce the number of business currently surveyed by about a third. The survey would be designed around Regional Council and RTO levels, but not TA levels. Accommodation Type disaggregation would still be available at the region/RTO levels, but it would be most reliable at the New Zealand level.

Survey design based on Accommodation Type

This could reduce the number of businesses surveyed by about two thirds. Region/RTO splits would still be available, but the regional information would be most reliable at the total Accommodation type level.

RTO/region and Accommodation Type

This option offers minimal reduction in the number of businesses surveyed in comparison to the current practice of full coverage census (i.e. surveying around 3,300 businesses every month). Region/RTO splits would still be available and would be reliable at the accommodation type level, as would accommodation type analysis at the regional level.

Reduce the frequency of the survey

This would involve reducing the frequency of the survey (e.g. from monthly to quarterly or annually), and modelling the data for the middle months, using administrative data.

The variables that are currently collected each month include:

- Stay unit nights
- Guest nights – domestic and international
- Stay length
- Capacity

To reduce respondent load, some of these variables could be collected less frequently than monthly (i.e. quarterly or annually). As an example, there is not much fluctuation for some

accommodation types in 'Capacity' – this data could possibly be asked for and updated annually.

Overall, there is stakeholder preference to keep monthly dissemination to align with other indicators of tourism activity (e.g. RTIs). Modelling methods could be used on less frequently collected data, to retain a monthly series.

Use of administrative data

This involves surveying fewer accommodation providers (i.e. just the very large or complex ones), and supplementing the survey with administrative data (e.g. GST data), and/or modelling. Initial investigations show that there is strong correlation between guest nights and GST as well as guest nights and RTI data.

The derived data would show the same information at a regional/RTO and/or accommodation type level that is currently available, and with varying reliability depending on the modelling parameters. If we are to go down the modelling track, there is also opportunity to extract more detailed data that could be useful for stakeholders (e.g. origin of guests, GST information).

Using a model combined with a survey of fewer respondents is best practice survey design and a direction Statistics New Zealand is taking with most of their other surveys.

Electronic collection methods

Statistics New Zealand currently receives some electronic submissions for the Accommodation Survey. This is offered mainly for group responses.

There is a plan to offer internet collection to all Statistics New Zealand surveys, but it could be some time before this is available for the Accommodation Survey.

One option is to have a secure, online portal for businesses to complete the survey. Respondents would be assigned a specific identification code allowing them to easily upload desired data variables via email prompting. The host of such a portal would have to ensure the security of data supplied and respondent confidentiality.

Using Property Management Systems for data collection

Another option for data collection is to extract data from businesses' existing PMS. Using PMS to coordinate data collection would save businesses time in having to complete the same information via the current CAM paper survey.

There may be around 30 different New Zealand PMS that accommodation providers currently use. It would require agreement from businesses to provide the appropriate data via their individual PMS and agreement from the PMS companies to supply data to Statistics New Zealand.

Statistics New Zealand currently receives data from one PMS system (Motel Mate). They get responses electronically from about 25-30% of MotelMate's customers. The process is that the customers press a button that sends the data through to a central database. All the responses are then emailed through to Statistics New Zealand in Excel format.

Further study on the feasibility of this option needs to be considered.

Ad-hoc studies

Ad-hoc studies in some sectors (e.g. holiday homes) could help with incomplete coverage where demand for data is high. It is not possible to capture some accommodation providers under current survey design as they are not included within the Statistics New Zealand business framework or GST data. However, administrative data (e.g. booking website data such as TradeMe, Bookabach, Wotif etc.) could be used to analyse statistics such as supply and regional coverage of these providers, perhaps in regions where demand is high and in direct competition with commercial accommodation providers.

Possible options could include purchasing data from website suppliers, or directly monitoring websites (depends on conditions of website use) for chosen variables. This would help our understanding of the patterns and dynamics of sectors that are not currently covered in the survey.

Dissemination and presentational improvements

Stakeholder feedback to date has indicated the following areas for improvement regarding dissemination:

- Improve coordination of website links between MBIE and Statistics New Zealand resources (i.e. the separate MBIE and Stats websites, Infoshare) so it is easier for users to find information (i.e. it's less of a maze)
- Improve the completeness of information that is provided – some users (e.g. HAPNZ) have to request separate analysis from Statistics New Zealand, when this information could be made available publically, it is just a different way of splitting the data.
- Consider the way seasonally adjusted data is presented and interpreted for the various audiences, according to their differing needs.

The presentation of data is an important part of the process of data analysis and reporting, to enable users to gain the best insight from the data. Currently Statistics New Zealand and MBIE publish the data via multiple methods and on an on-going monthly basis.

- The 'Key Facts' summaries provide trend graphs and insight commentary
- Key data tables with summary information on guest nights by RTO and accommodation type
- Regional pivot tables for user in-depth analysis
- PDF reports with RTO data
- Statistics New Zealand's Infoshare enables users to extract breakdowns of data into a preferred format (e.g. csv of Excel)

How the data is presented is of vital importance to a lot of stakeholders, and there is opportunity for us to improve graphical and geographic presentation of the data.

For example, the current Regional Tourism Summaries (provided by MBIE's Regional Tourism Estimates (RTE)) could also include Accommodation Survey information, thereby packaging up existing regional information that is currently provided to stakeholders. These summaries can be automated so that they are disseminated once a month with the latest RTI and CAM data (the Regional Tourism Summaries are currently published annually as the RTE data is only updated annually, but there is potential to update them monthly with the latest RTI and CAM data if this was wanted).

Annex 1 – Sources and example of CAM data analysis

Various CAM data analyses are presented on both MBIE[2] and Statistics New Zealand's websites[3], including historic data. These include:

'Key Facts' summary[4].

The graphs show the trend for New Zealand guest nights along with some commentary on the seasonally adjusted data.

Extract from 'Key Facts' summary of graph for May 2014
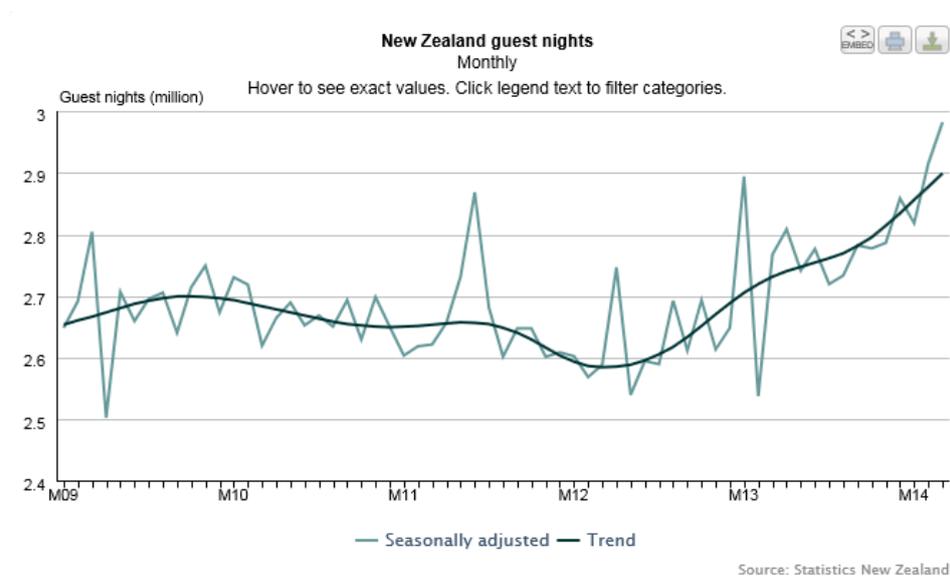
[2] http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/commercial-accommodation-monitor-data
[3] http://www.stats.govt.nz/browse_for_stats/industry_sectors/accommodation/info-releases.aspx
[4] http://www.stats.govt.nz/browse_for_stats/industry_sectors/accommodation/AccommodationSurvey_HOTPMay14.aspx

Key data tables[5]

These provide simply summary information on guest nights by RTO and accommodation type.

Extract of May 2014 Key data table

MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT
HIKINA WHAKATUTUKI

Guest Nights (Month)
Source: Commercial Accommodation Monitor

May Month	Guest Nights			Growth Rate (%)	
	2012	2013	2014	12-13	13-14
TOTAL	1,892,558	2,043,495	2,215,677	8	8
ACCOMMODATION TYPES:					
Hotels	733,786	811,394	878,310	11	8
Motels	641,410	678,251	726,169	6	7
Backpackers	265,151	297,681	329,544	12	11
Holiday parks	252,211	256,169	281,654	2	10
RTO AREAS:					
Northland RTO	79,616	82,595	97,259	4	18
Auckland RTO	458,311	497,763	540,918	9	9
Coromandel RTO	28,071	30,296	31,801	8	5
Waikato RTO	79,135	72,272	88,575	-9	23
Bay of Plenty RTO	63,118	60,051	69,503	-5	16
Rotorua RTO	96,994	116,565	123,704	20	6
Taupo RTO	51,794	53,896	58,121	4	8
Whakatane-Kawerau Dist.	8,927	10,162	10,503	14	3
Gisborne RTO	16,467	20,337	23,510	24	16
Taranaki RTO	34,932	35,716	35,735	2	0
Hawke's Bay RTO	52,345	55,389	54,279	6	-2
Ruapehu RTO	14,998	15,144	18,790	1	24

Guest Nights (Year)
Source: Commercial Accommodation Monitor

Year ended May	Guest Nights			Growth Rate (%)	
	2012	2013	2014	12-13	13-14
TOTAL	31,679,430	31,923,281	33,690,124	1	6
ACCOMMODATION TYPES:					
Hotels	10,587,179	11,092,996	11,748,462	5	6
Motels	10,378,110	10,389,422	10,905,887	0	5
Backpackers	4,310,454	4,191,400	4,592,834	-3	10
Holiday parks	6,403,687	6,249,463	6,442,941	-2	3
RTO AREAS:					
Northland RTO	1,580,092	1,555,019	1,632,576	-2	5
Auckland RTO	6,352,349	6,559,795	6,822,736	3	4
Coromandel RTO	711,312	724,754	747,208	2	3
Waikato RTO	1,090,311	1,092,318	1,176,341	0	8
Bay of Plenty RTO	1,094,168	993,689	1,097,582	-9	10
Rotorua RTO	1,703,119	1,739,795	1,824,704	2	5
Taupo RTO	958,195	951,692	970,470	-1	2
Whakatane-Kawerau Dist.	178,128	196,366	219,834	10	12
Gisborne RTO	327,222	317,837	332,616	-3	5
Taranaki RTO	571,250	557,094	586,854	-2	5
Hawke's Bay RTO	960,325	944,856	954,856	-2	1
Ruapehu RTO	393,848	373,781	429,461	-5	15

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[5] http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/commercial-accommodation-monitor-data/cam-key-data-tables

Regional pivot tables[6]

These are published on both MBIE and Statistics New Zealand websites and have detailed data on: RTO by accommodation type, TA by total accommodation, and origin of guest information by RTO. They allow users to do their own in-depth analysis on the data.

Example pivot table chart
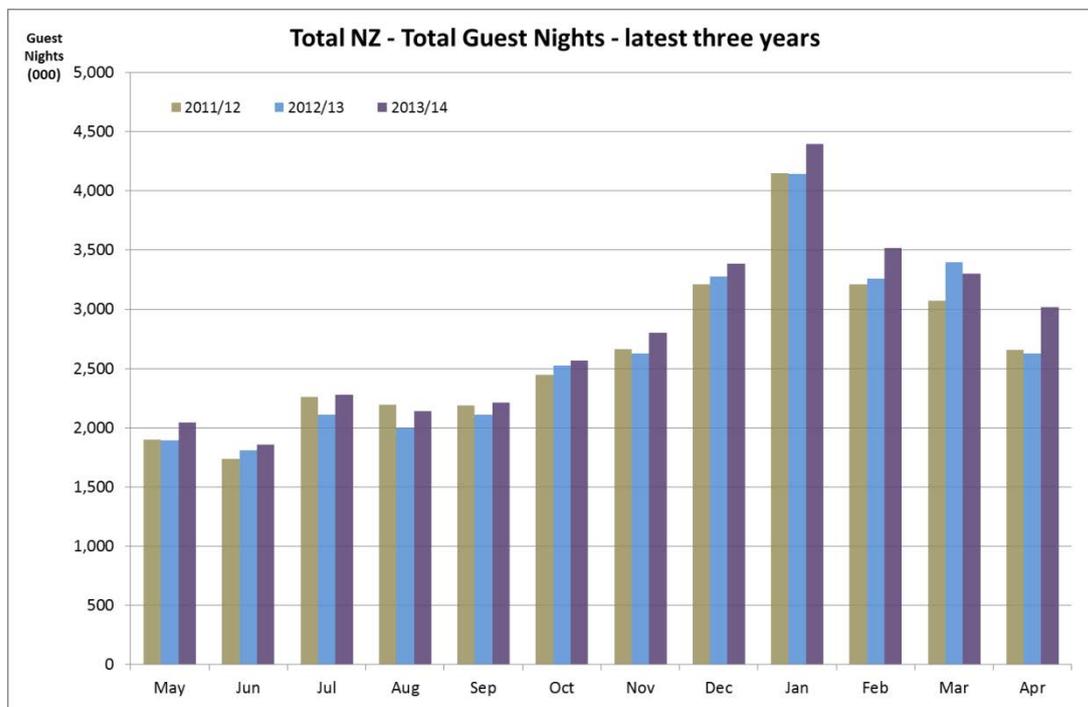
Current month RTO reports[7].

These are produced by Statistics New Zealand and published on MBIE's website. They include monthly and year end highlights for the region in question, as well as analysis on accommodation variables, origin of guests, national results, regional comparison, and local authority area results.

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[6] http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/commercial-accommodation-monitor-data/cam-regional-pivot-tables
[7] http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/commercial-accommodation-monitor-data/current-month-rto-reports

Statistics New Zealand Infoshare[8]

Accommodation Survey data is also stored in Statistics New Zealand's Infoshare, and users can select variables themselves and customise the data.

Statistics New Zealand's NZ.Stat[9]

NZ.Stat is another web tool from Statistics New Zealand, which enables users to download large datasets, select variables and customise their outputs of the data. It supersedes Infoshare.

The Accommodation Survey data will be available on NZ.Stat in the future (at the time of writing this paper, the IVS is currently on NZ.Stat and work is underway for Statistics New Zealand to deploy all of their data on NZ .Stat in the future).

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[8] http://www.stats.govt.nz/infoshare
[9] http://nzdotstat.stats.govt.nz/wbos/Index.aspx

Ad hoc analysis on existing accommodation data

This section outlines examples analyses of accommodation data that is already available to the public:

Figure 1 shows guest nights over time (both international and domestic) for different accommodation types. The fluctuations and scale of the graphs show the varying seasonal trends of different accommodation types, and the level of guests nights these types of establishments accommodate as a whole.

Figure 1: Guest nights by accommodation type
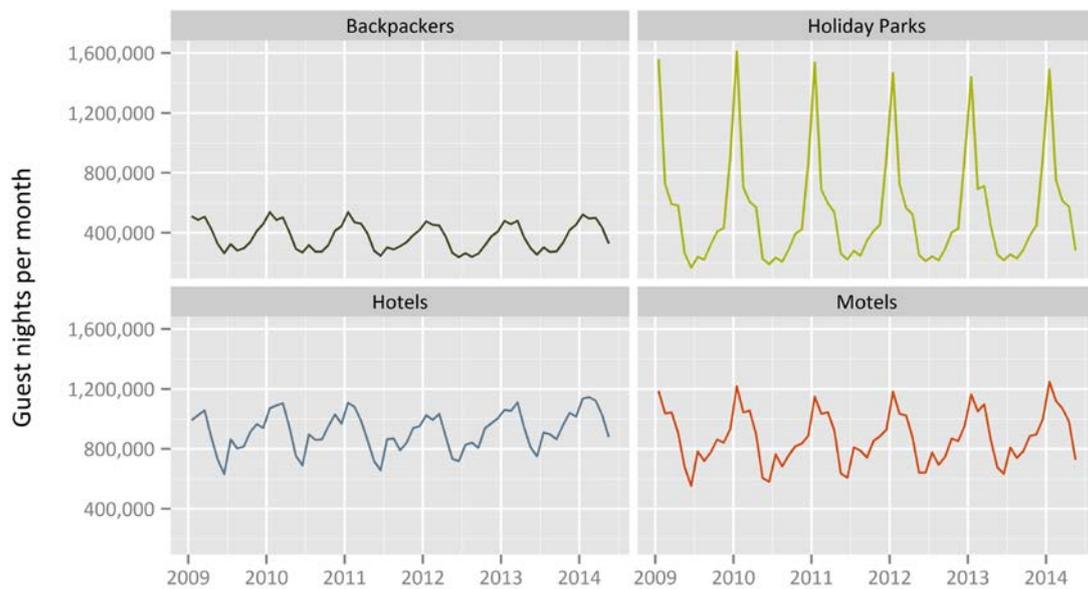
Source: CAM

Figure 2 shows the trends in occupancy rates across RTOs for the motel sector.

Figure 2: Occupancy for motels by Regional Tourism Organisation
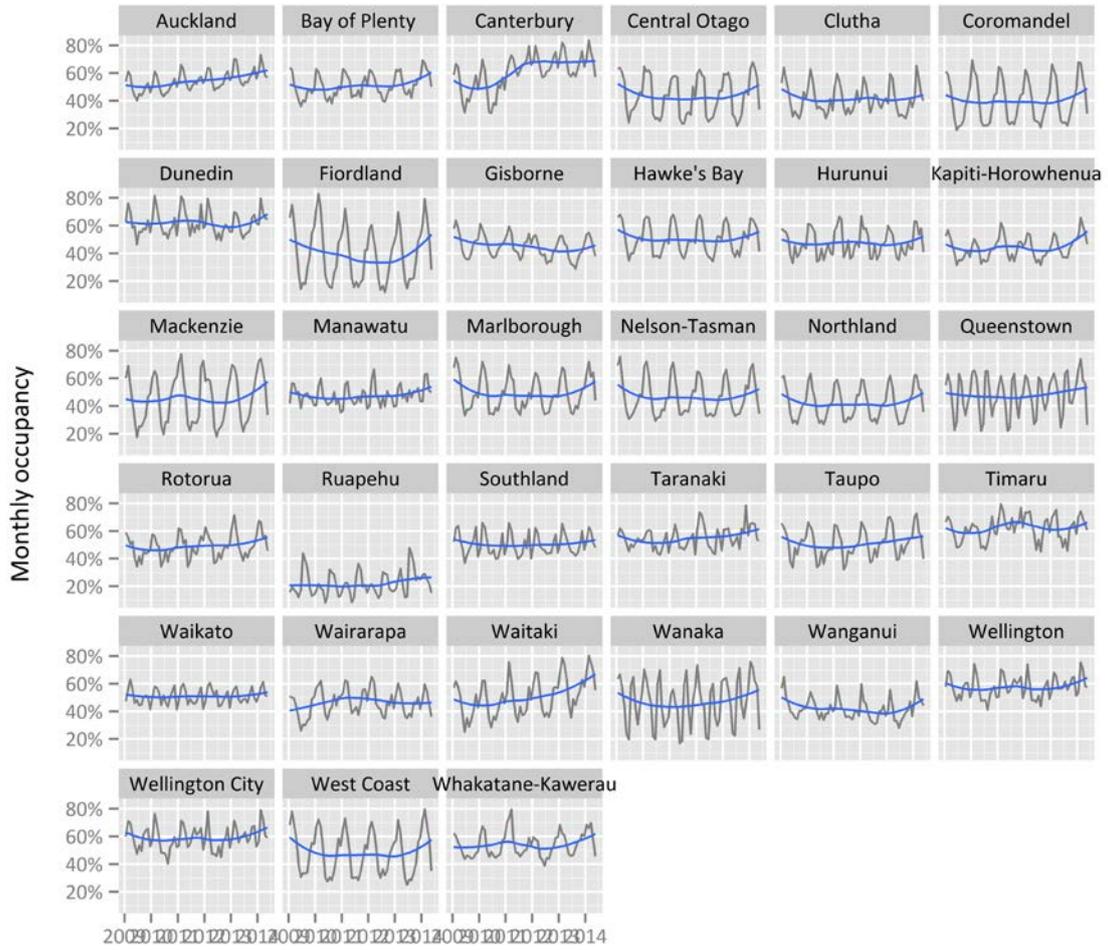
Source: CAM

MBIE's Regional Economic Activity Report

The Regional Economic Activity Report (REAR), although it does not include data from the Accommodation Survey directly, does provide detailed regional data on the accommodation sector.

The interactive tool provides rich sources of information that the user can manipulate depending on which characteristics of data they are interested in. The interactive tool can be found here: http://www.mbie.govt.nz/what-we-do/business-growth-agenda/regions/ or simply Google 'REAR MBIE' to find it.

Below is an extract example of what this interactive tool can provide. This particular example shows spend by visitors on different products in the Central Otago region, including illustrating separate data for the accommodation sector. The user can pick and choose what markets (domestic or international), regions or sectors they are interested in obtaining data on.
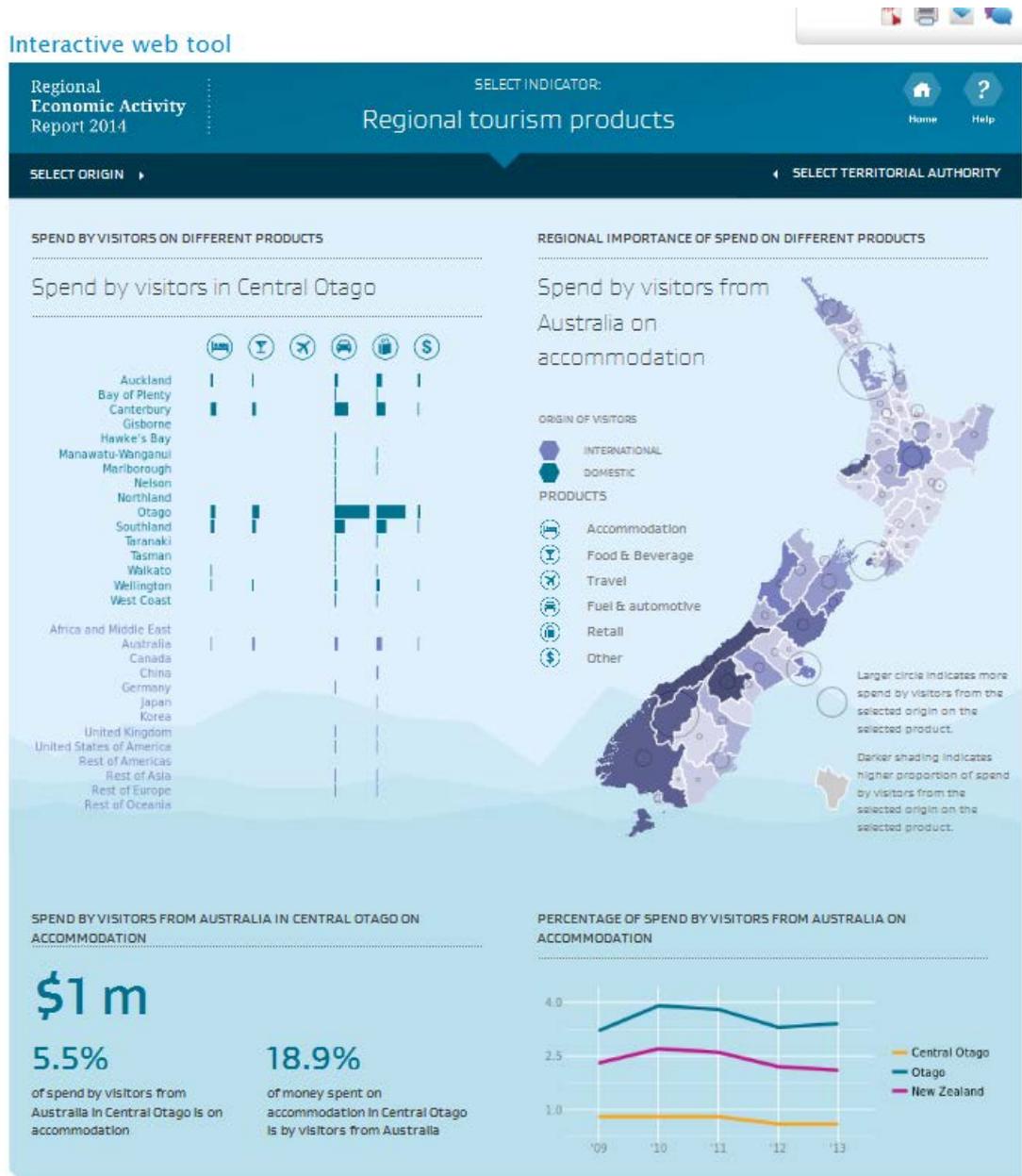
Annex 2 – CAM survey questionnaire

A This questionnaire will be scanned and recognised by electronic equipment. Therefore please:

- use a blue or a black pen
- keep each letter, number or mark within the spaces provided

For example: | 2 | 6 | 0 |

B The only part of the questionnaire that we require you to complete are questions 1 to 4 on page 3. The worksheet above question 1 on page 3 is only to help you work out the totals, you do not have to fill it in.

Please use your own records to work out totals for the month or, if you prefer, send us your own records for the month.

C Usual Residence of Guests

- For every guest please determine whether they usually live in New Zealand or Overseas.
- If you are unable to determine where a guest usually lives, enter them in the "Don't know" category.

D Stay Unit

- For the purpose of this survey, a stay unit is defined as whatever accommodation is sold to guests.
- It could be a powered or non-powered site, a bed in a bunkroom, a suite of rooms in a hotel, or a motel unit.
- It can NOT be a room in a motel unit if you would never sell just part of the unit.
- It can NOT be a bed in a twin hotel room if beds are never sold separately.

E Stay Unit Nights

- Example 1: If 5 stay units were occupied the first night of the month, 10 were occupied the second night of the month, 5 were occupied the third night of the month, and all were empty for the rest of the month, then the total stay unit nights would be 20.
- Example 2: If you had 5 stay units and every one of them had been occupied on 20 nights of the month, then the total stay unit nights would equal 100.

F Guest Nights

- Every time a guest stays a night, that contributes 1 to the *total guest nights*. If the same guest stays another night, that adds a further 1 to the *total guest nights*. If 3 guests stay in one unit, that adds 3 to the *total guest nights* and if they stay for another night, that adds another 3 to the *total guest nights*.

G Guest Arrivals

- This is the number of guests who are arriving for the first night of their CURRENT stay.
- If any guests leave and then come back for a second stay, they must be counted twice; once for the first night of their first stay, and once for the first night of their second stay.

H Please keep a record of the time it takes you to complete this questionnaire. You are asked to record this at the end of the questionnaire.

Include:
- the time spent reading the instructions, working on the questions and obtaining information
- the time spent by all employees in collecting and providing this information

I Please make any comments that would help Statistics New Zealand interpret the information that you have given.

Month	

The only parts you need to complete are questions 1, 2, 3, and 4.

The main results of all our surveys are available at www.stats.govt.nz

Thank you for your time and effort.

Statistics New Zealand Accommodation Survey

Month	

Optional Worksheet (see note B)

Day of month	Number of stay units occupied tonight	Number of guests staying tonight by usual residence			Total guests tonight	Number of guest arrivals tonight
		New Zealand	Overseas	Don't know		
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
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30						
31						

1

Total stay unit nights	Total NZ guests	Total overseas guests	Total-don't know usual residence	Total guest nights	Total guest arrivals

2 How many stay units do you have in this establishment?

Don't count stay units that are being redecorated or are otherwise out of use and that you would not be prepared to sell that day.

Count all units that are sold, and all vacant units available for sale.

Number of stay units

3 How long did it take you to complete this questionnaire?

Include:
- the time spent reading the instructions, working on questions and obtaining information
- the time spent by all employees in collecting and providing this information

hrs | mins

4 Who should we contact if we have any queries about the information that you have given?

Office use:

Name		Date			A	B	C
Signature			Day	Month	Year	A	B	C

Annex 3 - International practice

There is no consistent pattern for the collection of accommodation data worldwide. Countries are very individual according to their own needs, i.e. there is no 'one size fits all' approach. The countries listed below have some relevant similarities to New Zealand with regard to accommodation data.

Denmark

Statistics Denmark produces a number of tourism statistics. They include:

- The number of overnight stays in hotels, holiday centres, and youth hostels by region and nationality of guest
- Holiday dwellings for a selected area by nationality of guest
- The number of overnight stays at camping sites by nationality of guest
- The number of overnight stays in Marinas by nationality of guest

France

The National Institute of Statistics and Economic Studies produce three main tourism statistics:

- The Hotel Occupancy Survey measures the stock annually, and the occupancy monthly. The method of collection is a postal sample survey.
- The Outdoor Accommodation Occupancy Survey is conducted during the summer months (May to September), and the stock is measured on 30 November each year. The information is collected from all providers.
- The Other Collective Tourist Accommodation Occupancy Survey supplements the other two surveys. The method of collection is a postal sample survey.

Norway

Statistics Norway has the most similar approach to New Zealand. Their survey covers all hotels and similar establishments with a capacity over a specified size. Data is collected via a postal survey, directly from booking systems and an internet questionnaire.

Australia

Australia has the Survey of Tourist Accommodation (STA).

On 5 June 2014, the Australian Bureau of Statistics (ABS) announced that due to a $50 million reduction in their forward budget, a range of statistical collections, including the STA, would be discontinued. Following this announcement, Austrade agreed to provide funding to the ABS to allow data for the 2013/14 year to be collected, with the scheduled release in December 2014. Further funding will be required if the STA is to be maintained in future years. Austrade and the ABS are to work on developing future funding options.

Before these funding decisions were made, ABS had moved from monthly to quarterly frequency of the survey, and were going to publish it annually from this year onwards. They were also looking to get access to accommodation reservation systems so that data could be collected automatically. This included willingness of providers to grant this access and the cost of developing systems with those who provide the reservation systems to allow this to occur.

Annex 4 – MBIE's statistical production process

As recommended by the TDDP, MBIE's approach to producing statistics is shown in the flow diagram below: