



Commercial Accommodation Monitor: December 2018

Waikato

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Preface

Commercial Accommodation Monitor: December 2018 – Waikato presents comprehensive and impartial information on short-term commercial accommodation for the Waikato 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:

- Hamilton City
- Matamata-Piako District
- Otorohanga District
- South Waikato District
- Waikato District (excluding the area transferred in from Franklin District on 1 November 2010)
- Waipa District
- Waitomo 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 January 2019 monitor will be released on 14 March 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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Contents

List of tables and figures	vi
1 Highlights	1
Monthly highlights	1
Year ended highlights	2
2 Accommodation variables	4
3 Origin of guests	6
4 National results	8
5 Regional comparison	9
6 Local authority area results	12
7 Accommodation Survey technical notes	14

List of tables and figures

Tables by chapter

2 Accommodation variables

2.1 Waikato accommodation variables by accommodation type.....	5
--	---

3 Origin of guests

3.1 Waikato and New Zealand monthly guest nights by origin of guest.....	7
--	---

4 National results

4.1 Waikato and New Zealand guest nights by accommodation type.....	8
---	---

5 Regional comparison

5.1 Regional tourism organisation areas' monthly guest nights by origin of guest.....	10
---	----

5.2 Regional tourism organisation areas' monthly occupancy rates by accommodation type	11
--	----

6 Local authority results

6.1 Local authority and Waikato accommodation results.....	12
--	----

Figures by chapter

1 Highlights

1.1 Waikato RTO area monthly guest nights.....	1
--	---

1.2 Waikato RTO area monthly guest nights, change from same month of previous year	2
--	---

1.3 Waikato RTO area annual guest nights.....	3
---	---

1.4 Waikato RTO area annual guest nights, change from previous year.....	3
--	---

3 Origin of guests

3.1 Waikato RTO area monthly guest nights, by origin of guest.....	6
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1 Highlights

Monthly highlights

In December 2018 compared with December 2017:

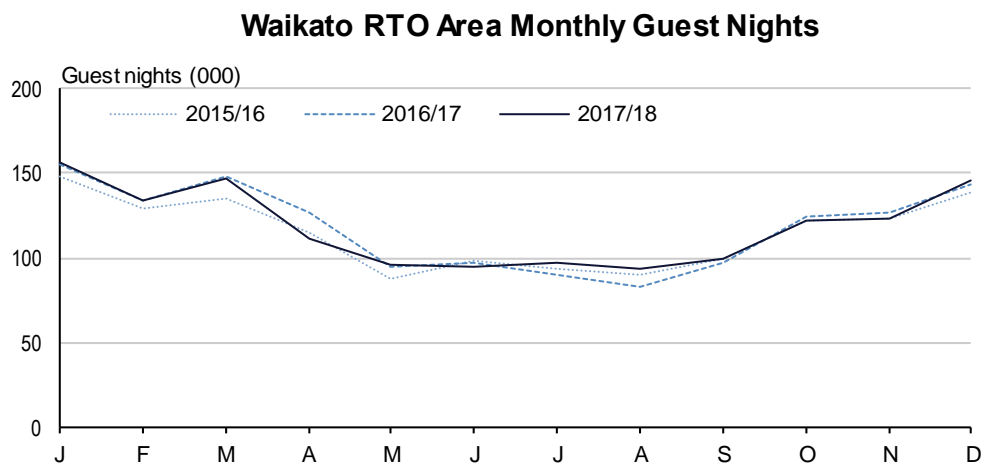
- Guest nights rose 2.0 percent to 145,841
- International guest nights fell 8.2 percent to 43,774
- Domestic guest nights rose 7.0 percent to 102,067
- The average length of stay rose from 1.86 nights to 2.02 nights
- The overall occupancy rate fell from 48.4 percent to 48.1 percent
- The occupancy rate, excluding holiday parks, was 58.0 percent in December 2018
- Accommodation capacity, excluding holiday parks, fell 0.6 percent.

Response rates for December 2018

The response rate for the Waikato RTO area was 84 percent for December 2018.

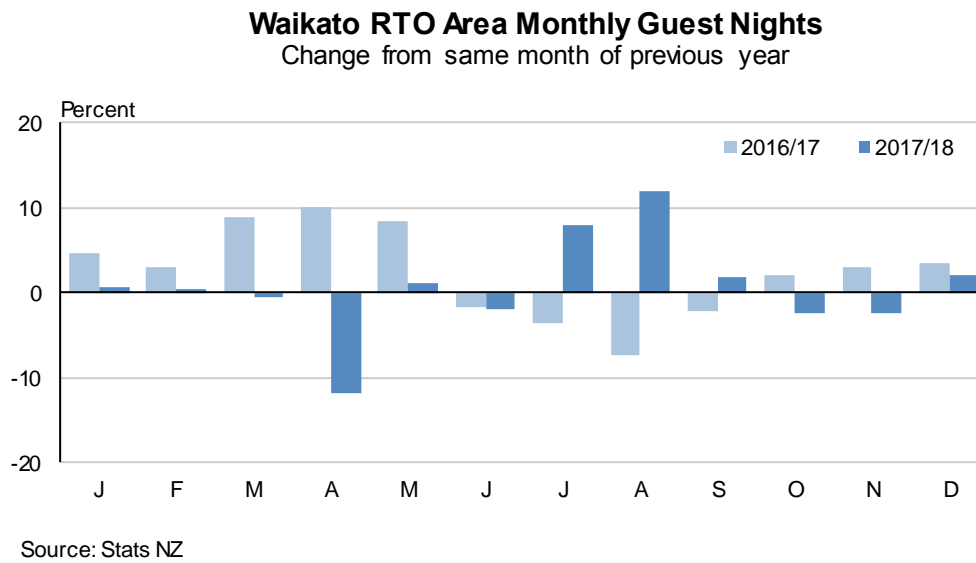
The proportion of the origin-of-guest estimate from unadjusted data was 66 percent.

Figure 1.1



Source: Stats NZ

Figure 1.2

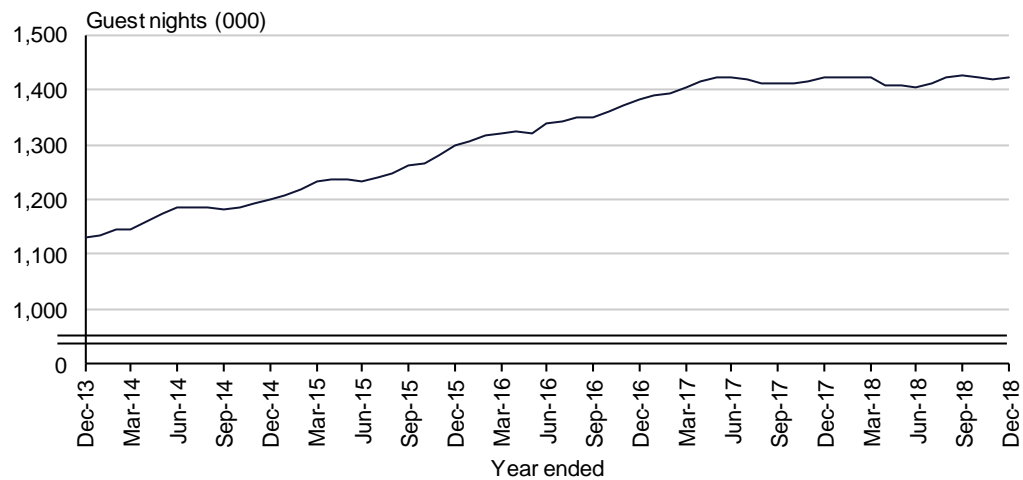


Year ended highlights

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

- Guest nights were almost unchanged at 1,420,872
- International guest nights rose 1.0 percent to 375,478
- Domestic guest nights fell 0.3 percent to 1,045,395
- The average length of stay rose from 1.83 nights to 1.87 nights
- The overall occupancy rate fell from 43.5 percent to 43.1 percent
- The occupancy rate, excluding holiday parks, was 57.3 percent for the year ended December 2018
- Accommodation capacity, excluding holiday parks, rose 2.4 percent.

Figure 1.3

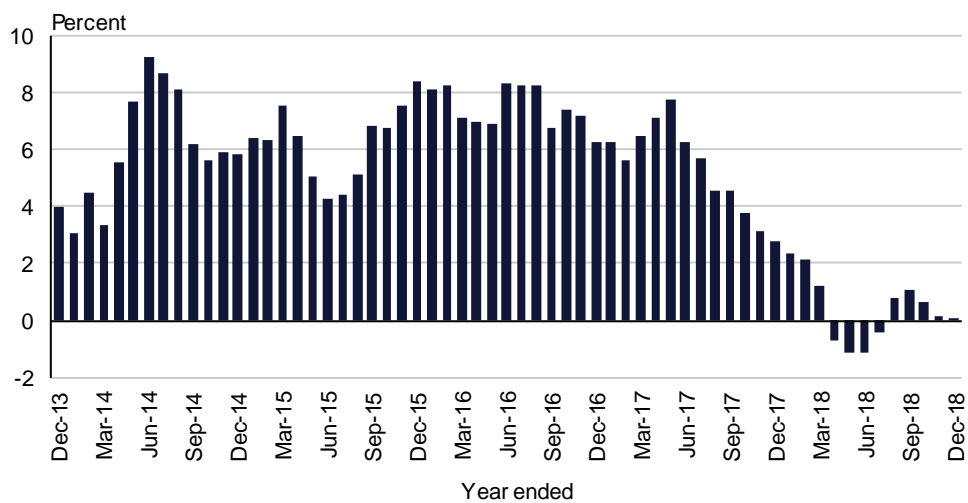
Waikato RTO Area Annual Guest Nights

Source: Stats NZ

Figure 1.4

Waikato RTO Area Annual Guest Nights

Change from previous year



Source: Stats NZ

2 Accommodation variables

In December 2018, compared with December 2017, there was an increase of 2.0 percent in total guest nights for the Waikato RTO area. Motels had the largest increase, followed by holiday parks. Hotels had the largest decrease.

For the year ended December 2018, compared with the previous December year, total guest nights for the Waikato RTO area were similar. Holiday parks had the largest increase, followed by backpackers. Hotels had the largest decrease.

See table 2.1 for comparisons of data across the main accommodation variables.

Table 2.1

Waikato Accommodation Variables*By accommodation type
Monthly and year ended⁽¹⁾⁽²⁾*

Accommodation type	Monthly			Annual		
	December		Percentage change	Year ended		Percentage change
	2017	2018		December 2017	December 2018	
Guest nights						
Total guest nights	143,039	145,841	2.0	1,420,372	1,420,872	0.0
International	47,667	43,774	-8.2	371,683	375,478	1.0
Domestic	95,372	102,067	7.0	1,048,688	1,045,395	-0.3
Hotels	30,637	29,171	-4.8	347,597	336,056	-3.3
Motels/apartments	58,909	61,460	4.3	672,588	664,061	-1.3
Backpackers	13,481	13,124	-2.6	121,369	128,087	5.5
Holiday parks	40,012	42,086	5.2	278,817	292,669	5.0
Occupancy rates ⁽³⁾ (%)						
Hotels	60.2	57.7	-4.2	64.8	61.5	-5.1
Motels/apartments	63.6	61.6	-3.2	66.3	64.6	-2.6
Backpackers	46.6	50.4	8.1	37.8	38.3	1.3
Holiday parks	32.0	31.8	-0.6	19.1	19.6	2.5
Total	48.4	48.1	-0.7	43.5	43.1	-1.0
Total excluding holiday parks ⁽⁴⁾	58.5	58.0	-0.8	58.8	57.3	-2.6
Average length of stay ⁽⁵⁾						
Hotels	1.77	1.85	4.5	1.86	1.82	-2.0
Motels/apartments	1.69	2.08	22.9	1.77	1.87	5.5
Backpackers	1.94	1.53	-21.3	1.85	1.73	-6.4
Holiday parks	2.27	2.30	1.3	1.92	1.99	3.5
Total	1.86	2.02	8.3	1.83	1.87	2.2
Guest arrivals						
Hotels	17,320	15,785	-8.9	187,093	184,626	-1.3
Motels/apartments	34,834	29,562	-15.1	379,125	354,956	-6.4
Backpackers	6,939	8,590	23.8	65,634	74,017	12.8
Holiday parks	17,619	18,291	3.8	145,246	147,320	1.4
Total	76,712	72,228	-5.8	777,098	760,918	-2.1
Establishments						
Hotels	21	21	0.0	21	21	0.0
Motels/apartments	85	86	1.2	85	86	1.2
Backpackers	14	14	0.0	14	14	0.0
Holiday parks	23	22	-4.3	23	22	-4.3
Total	143	143	0.0	143	143	0.0
Capacity ⁽⁶⁾						
Hotels	27,931	28,365	1.6	319,746	329,337	3.0
Motels/apartments	48,236	49,631	2.9	565,799	580,261	2.6
Backpackers	25,389	22,971	-9.5	292,706	296,989	1.5
Holiday parks	62,186	61,504	-1.1	736,362	724,237	-1.6
Total	163,742	162,471	-0.8	1,914,613	1,930,824	0.8

(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:

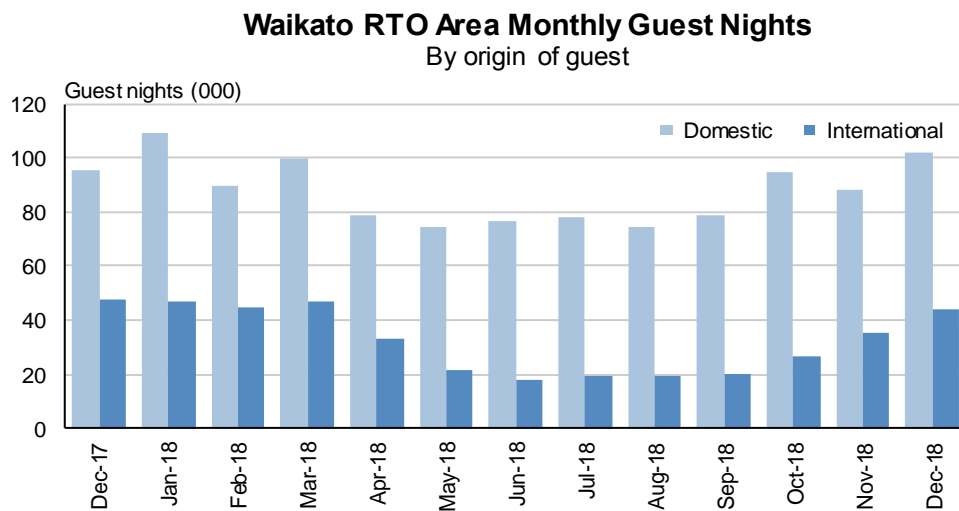
C confidential

3 Origin of guests

In December 2018, international guests accounted for 30 percent of all guest nights in the Waikato RTO area. When compared with December 2017, the number of international guest nights spent in the area in December 2018 was down 8.2 percent to 43,774. Domestic guest nights increased 7.0 percent, to 102,067, for the same period.

The proportion of the origin-of-guest estimate from actual data was 66 percent for December 2018.

Figure 3.1



Source: Stats NZ

Table 3.1

Waikato and New Zealand Monthly Guest Nights*By origin of guest*

		Waikato RTO ⁽¹⁾ area			New Zealand		
		Origin of guest		Total	Origin of guest		Total
		Domestic	International		Domestic	International	
Month							
2017	Dec	95,372	47,667	143,039	2,215,289	1,926,411	4,141,700
2018	Jan	109,401	46,787	156,188	2,851,307	2,117,813	4,969,120
	Feb	89,352	44,912	134,265	1,938,307	2,092,637	4,030,944
	Mar	99,683	47,209	146,892	2,180,388	1,996,067	4,176,455
	Apr	78,515	32,957	111,472	1,860,719	1,569,372	3,430,091
	May	74,566	21,430	95,996	1,493,682	1,047,474	2,541,156
	Jun	76,905	18,000	94,905	1,443,331	824,407	2,267,738
	Jul	78,302	19,322	97,624	1,688,075	989,310	2,677,385
	Aug	74,244	19,103	93,347	1,571,502	952,679	2,524,181
	Sep	79,151	20,040	99,191	1,701,704	1,046,180	2,747,884
	Oct	94,898	26,772	121,670	1,954,146	1,314,205	3,268,352
	Nov	88,309	35,173	123,482	1,804,941	1,730,166	3,535,107
	Dec	102,067	43,774	145,841	2,289,702	1,908,866	4,198,568
Percent change from the current month of the previous year							
		7.0	-8.2	2.0	3.4	-0.9	1.4
Year ended							
December 2017		1,048,688	371,683	1,420,372	22,225,169	17,239,262	39,464,431
December 2018		1,045,395	375,478	1,420,872	22,777,803	17,589,177	40,366,980
Percent change from previous year							
		-0.3	1.0	0.0	2.5	2.0	2.3

(1) Regional tourism organisation

4 National results

In December 2018, a total of 4,199,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 57,000 nights (1.4 percent) from December 2017. North Island guest nights were relatively unchanged (up 1,000 or 0.1 percent) while the South Island recorded an increase (up 55,000 or 3.1 percent).

Three of the four accommodation types recorded an increase in guest nights in December 2018, compared with December 2017. Hotels had the largest increase in guest nights (up 39,000 or 3.0 percent), followed by holiday parks (up 22,000 or 1.9 percent) and motels (up 19,000 or 1.6 percent). Backpackers had the only decrease in guest nights (down 24,000 or 4.6 percent).

For the year ended December 2018, there were 40,367,000 guest nights, an increase of 903,000 (2.29 percent) from the previous December year.

Refer to Table 4.1 for comparisons of data.

Table 4.1

Waikato 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
December month					
Waikato RTO area					
Hotels	29,785	30,637	29,171	2.9	-4.8
Motels	61,934	58,909	61,460	-4.9	4.3
Backpackers	12,909	13,481	13,124	4.4	-2.6
Holiday parks	33,740	40,012	42,086	18.6	5.2
Total	138,369	143,039	145,841	3.4	2.0
New Zealand					
Hotels	1,237,791	1,303,962	1,343,454	5.3	3.0
Motels	1,156,389	1,166,005	1,184,840	0.8	1.6
Backpackers	507,624	512,453	488,807	1.0	-4.6
Holiday parks	1,081,525	1,159,280	1,181,467	7.2	1.9
Total	3,983,330	4,141,700	4,198,568	4.0	1.4
Year ended December					
Waikato RTO area					
Hotels	328,682	347,597	336,056	5.8	-3.3
Motels	645,663	672,588	664,061	4.2	-1.3
Backpackers	123,397	121,369	128,087	-1.6	5.5
Holiday parks	283,755	278,817	292,669	-1.7	5.0
Total	1,381,496	1,420,372	1,420,872	2.8	0.0
New Zealand					
Hotels	13,606,865	13,932,801	14,457,019	2.4	3.8
Motels	12,128,919	12,359,189	12,483,219	1.9	1.0
Backpackers	5,154,200	5,210,060	5,061,309	1.1	-2.9
Holiday parks	7,610,913	7,962,381	8,365,433	4.6	5.1
Total	38,500,897	39,464,431	40,366,980	2.5	2.3

5 Regional comparison

In December 2018, Mackenzie recorded the largest increase in guest nights (up 20,000 or 23.8 percent) from December 2017. This was followed by Queenstown (up 17,000 or 4.9 percent), Canterbury (up 13,000 or 3.4 percent), Coromandel (up 10,000 or 8.0 percent), and Auckland (up 8,000 or 1.3 percent).

Rotorua recorded the largest decrease (down 12,000 or 5.0 percent), followed Hawke's Bay (down 9,000 or 6.9 percent), Taupo (down 6,000 or 4.5 percent), Hurunui (down 4,000 or 11.1 percent), and Taranaki (down 3,000 or 4.9 percent).

Table 5.1

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

RTO area	December guest nights								
	Domestic			International			Total		
	2017	2018	Percent age change	2017	2018	Percent age change	2017	2018	Percent age change
Northland	172,990	170,427	-1.5	80,171	83,177	3.7	253,161	253,604	0.2
Auckland	334,905	331,995	-0.9	328,564	339,830	3.4	663,469	671,825	1.3
Coromandel	83,579	96,121	15.0	38,501	35,677	-7.3	122,080	131,798	8.0
Waikato	95,372	102,067	7.0	47,667	43,774	-8.2	143,039	145,841	2.0
Bay of Plenty	93,703	95,896	2.3	36,549	32,687	-10.6	130,251	128,583	-1.3
Rotorua	108,310	109,842	1.4	128,902	115,496	-10.4	237,211	225,338	-5.0
Taupo	74,720	72,793	-2.6	54,637	50,775	-7.1	129,357	123,568	-4.5
Whakatane-									
Kawerau	32,399	30,976	-4.4	8,224	6,685	-18.7	40,623	37,661	-7.3
Gisborne	38,859	40,167	3.4	7,648	5,266	-31.1	46,507	45,433	-2.3
Taranaki	56,378	53,003	-6.0	14,140	14,036	-0.7	70,518	67,039	-4.9
Hawke's Bay	95,474	90,833	-4.9	41,403	36,574	-11.7	136,877	127,406	-6.9
Ruapehu	23,913	22,596	-5.5	22,112	22,500	1.8	46,025	45,097	-2.0
Manawatu	35,879	40,580	13.1	7,451	7,515	0.9	43,331	48,095	11.0
Whanganui	13,290	14,662	10.3	5,424	5,921	9.2	18,713	20,583	10.0
Wairarapa	20,217	23,880	18.1	5,604	4,377	-21.9	25,821	28,257	9.4
Kapiti-Horowhenua	25,052	29,495	17.7	4,957	5,616	13.3	30,009	35,111	17.0
Wellington	143,605	150,437	4.8	89,162	85,527	-4.1	232,767	235,964	1.4
Marlborough	42,391	45,162	6.5	34,933	36,170	3.5	77,325	81,332	5.2
Nelson-Tasman	115,477	117,057	1.4	71,665	72,466	1.1	187,142	189,523	1.3
Canterbury	189,450	192,505	1.6	196,972	207,221	5.2	386,423	399,727	3.4
Hurunui	23,547	22,792	-3.2	15,159	11,624	-23.3	38,706	34,416	-11.1
Mackenzie	23,407	38,266	63.5	62,737	68,376	9.0	86,144	106,642	23.8
Timaru	22,129	22,152	0.1	11,187	11,470	2.5	33,317	33,622	0.9
West Coast	49,846	51,329	3.0	115,647	111,833	-3.3	165,493	163,162	-1.4
Wanaka	44,648	48,454	8.5	61,401	59,180	-3.6	106,049	107,635	1.5
Queenstown	91,943	108,916	18.5	260,528	260,667	0.1	352,472	369,583	4.9
Waitaki	31,263	28,922	-7.5	20,747	23,329	12.4	52,010	52,251	0.5
Central Otago	39,032	34,817	-10.8	9,949	11,864	19.3	48,981	46,681	-4.7
Dunedin	42,962	48,940	13.9	46,993	38,837	-17.4	89,955	87,777	-2.4
Clutha	6,230	6,581	5.6	4,134	4,733	14.5	10,364	11,315	9.2
Fiordland	21,139	25,002	18.3	71,569	71,899	0.5	92,708	96,902	4.5
Southland	23,178	23,035	-0.6	21,676	23,764	9.6	44,854	46,799	4.3
Total	2,215,289	2,289,702	3.4	1,926,411	1,908,866	-0.9	4,141,700	4,198,568	1.4

Table 5.2

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

RTO area	December 2018 occupancy rate					
	Accommodation type					Total excluding holiday parks ⁽²⁾
	Hotels	Motels	Backpackers	Holiday parks	Total	
	Percent					
Northland	52.7	65.7	50.0	30.8	41.0	57.1
Auckland	77.2	63.6	53.0	30.4	64.3	68.9
Coromandel	53.9	55.6	34.1	31.2	35.8	46.5
Waikato	57.7	61.6	50.4	31.8	48.1	58.0
Bay of Plenty	60.6	67.4	47.7	32.0	45.1	58.1
Rotorua	78.2	70.0	33.0	38.2	54.1	58.4
Taupo	60.5	64.4	47.8	29.7	48.3	57.2
Whakatane-Kawerau	C	59.4	C	19.4	27.2	52.8
Gisborne	C	63.4	C	18.6	30.1	54.4
Taranaki	47.4	42.5	44.4	32.2	39.6	44.6
Hawke's Bay	64.1	65.9	68.3	34.3	53.7	66.2
Ruapehu	49.7	35.9	24.5	48.2	35.6	33.1
Manawatu	37.4	52.2	C	C	40.0	C
Whanganui	C	49.3	59.4	C	37.6	C
Wairarapa	C	56.0	C	20.7	32.3	48.3
Kapiti-Horowhenua	C	60.2	C	26.3	27.8	29.4
Wellington	71.9	66.9	C	C	61.6	C
Marlborough	53.4	62.6	44.4	36.9	47.3	54.0
Nelson-Tasman	59.5	61.6	55.9	34.0	45.5	58.7
Canterbury	70.2	63.5	41.4	30.6	49.4	58.5
Hurunui	C	50.7	C	20.6	30.9	39.7
Mackenzie	C	70.0	C	70.5	74.1	75.9
Timaru	C	59.8	C	28.9	39.0	52.8
West Coast	59.8	63.6	45.4	36.6	50.5	56.2
Wanaka	67.9	82.5	68.5	46.6	58.4	71.8
Queenstown	84.2	72.3	78.3	46.3	75.4	80.0
Waitaki	46.4	64.4	35.6	9.3	18.2	52.1
Central Otago	31.8	63.5	49.2	19.5	27.3	50.5
Dunedin	61.8	67.9	38.1	43.1	55.6	58.9
Clutha	C	44.6	C	22.7	30.0	40.5
Fiordland	C	72.5	C	57.5	64.6	68.6
Southland	49.9	46.6	37.9	27.8	39.7	44.9
Total	69.6	62.4	48.2	30.8	49.9	60.8

(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 Waikato RTO area.

Table 6.1

Local Authority and Waikato Accommodation Results⁽¹⁾

Accommodation type	December 2018 results				
	Establish-ments	Capacity	Guest Nights	Average stay length	Occupancy rate
	Number			Days	Percent
Waikato District					
Hotels	4	1,953	849	C	23.96
Motels	8	3,193	2,896	1.68	41.08
Backpackers	3	4,092	C	C	C
Holiday parks	4	16,523	C	C	C
Total	19	25,761	23,094	3.03	40.94
Hamilton City					
Hotels	8	21,235	24,249	2.01	63.72
Motels	40	29,636	38,063	2.33	66.11
Backpackers	3	4,960	C	C	C
Holiday parks	1	2,201	C	C	C
Total	52	58,032	66,794	2.12	62.81
Waipa District					
Hotels	3	961	C	C	C
Motels	13	6,851	9,485	2.07	57.26
Backpackers	4	7,285	C	C	C
Holiday parks	4	17,856	7,262	1.95	19.16
Total	24	32,953	20,027	2.02	31.61
Otorohanga and Waitomo Districts					
Hotels	3	1,705	C	C	C
Motels	11	4,433	4,563	1.59	50.97
Backpackers	3	5,332	C	C	C
Holiday parks	9	17,267	9,986	1.49	30.70
Total	26	28,737	21,285	1.44	43.05

Table 6.1(continued)

Local Authority and Waikato Accommodation Results

Accommodation type	December 2018 results				
	Establish-ments	Capacity	Guest Nights	Average stay length	Occupancy rate
	Number			Days	Percent
Matamata-Piako and South Waikato Districts					
Hotels	3	2,511	C	C	C
Motels	14	5,518	6,452	1.58	62.98
Backpackers	1	1,302	C	C	C
Holiday parks	4	7,657	5,378	C	35.39
Total	22	16,988	14,640	1.75	48.95
Waikato Regional Tourism Organisation area					
Hotels	21	28,365	29,171	1.85	57.74
Motels	86	49,631	61,460	2.08	61.58
Backpackers	14	22,971	13,124	1.53	50.43
Holiday parks	22	61,504	42,086	2.30	31.82
Total	143	162,471	145,841	2.02	48.07

(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>