MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT

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Results of the Accommodation Survey Stakeholder Questionnaire

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Introduction

In March of 2019, MBIE carried out a stakeholder questionnaire in order to better understand stakeholder's usage and needs regarding Accommodation Survey data.

The Accommodation Survey is funded by MBIE and produced by Statistics New Zealand, and provides a census of hotels, motels, holiday parks and backpackers. It provides occupancy rates, establishments and guest nights on a monthly basis, and provides this information for both international and domestic visitors at regional scales.

The objective of the Accommodation Survey was to provide an authoritative set of information on accommodation supply and demand for use in policy planning at the national and regional level. It is also commonly used to estimate visitor volumes across regions and it remains the only publicly available measure of commercial accommodation at subnational levels.

Following the announcement of the cessation of the Accommodation Survey, in September 2019, MBIE is now working with industry and local government to identify alternative and innovative means of gathering accommodation data.

Overall feedback from the questionnaire indicates that while the industry values and relies on the insights that the survey provides, there is a clear need for improvement.

Method

The questionnaire was developed by the Business and Economic Development team at MBIE, and was structured around the following six questions:

> a. *What category best describes your organisation?*
> b. *How often is Accommodation Survey data used by your organisation?*
> c. *How important is Accommodation Survey data to your organisation?*
> d. *Overall, how useful is the Accommodation Survey data?*
> e. *How could the Accommodation Survey data better meet your organisation's needs?*
> f. *Is there anything else you would like us to consider?*

The questionnaire was emailed to the *Tourism Stakeholder Alerts* mailing list*;* members could then forward the questionnaire to their networks. The survey was administered electronically using Survey Monkey. Respondents were given ten days to complete the survey (from Friday 25th March 2019 to Friday 5th April 2019). Key themes were drawn-out from responses to question 5 (open-ended) and the frequency of responses discussing each theme is reported on.

Respondents

There were 191 respondents to the questionnaire and a further 36 respondents dropped out of the survey before reaching the final question.

Figure 1: All respondents
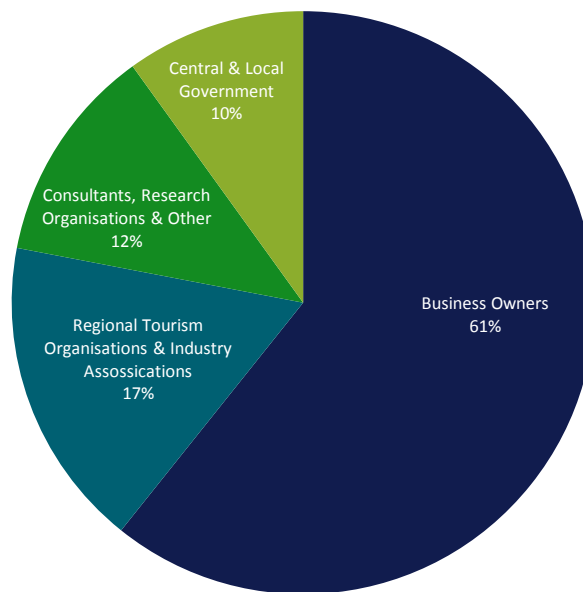
Responses were classified into four categories: 1) *Regional Tourism Organisations & Industry Associations*, 2) *Central & Local Government*, 3) *Business Owners*, and 4) *Consultants, Research Organisations and Other*. The classifications are based on respondent's answers to question 1. Results of the questionnaire are presented for categories 1 through 3, in order to illustrate relativities between groups. *Consultants, Research Organisations and Other* are not reported on independently due to the heterogeneous composition of the group.

Key Themes

Key themes were drawn-out from responses to question 5: *How could the Accommodation Survey data better meet your organisation's needs?* The most frequently discussed themes in the questionnaire were:

a. **Greater coverage to include non-traditional forms of accommodation**
Respondents to the questionnaire frequently commented that the survey data had become increasingly inadequate because it did not capture the impact or extent of the unmeasured accommodation sector (e.g. the market share and volume of Airbnb, Book-A-Batch, luxury accommodation and hosted accommodation).

b. **Greater breakdown of results, particularly by country of origin**
A greater disaggregation of results was identified as important by 17 percent of respondents. Users commented that it would be useful if country of origin data could be further broken down past the current international / domestic split. Some users also said that a more granular or consistent disaggregation of geographic data was important (e.g. to better align with RTO boundaries and the MRTE's).

c. **Data quality concerns**
Eight percent of respondents lacked confidence in the accuracy of the Accommodation Survey results. These respondents questioned the reliability and validity of the Accommodation Survey – stating that the data was either unsubstantiated, over-reliant on self-reporting, or inconsistent with their own data / experience.

d. **Faster Results**
Eight percent of the sample commented that the lag on delivery of results limited the usefulness of the data, given it is disseminated approximately 1-2 months after the time of collection.

Results

Section 1: Regional Tourism Organisations & Industry Associations

MBIE received 29 responses from Regional Tourism Organisations (RTOs) and 4 responses from Industry Associations (17 percent of the sample).

Figure 2: How often is Accommodation Survey data used by RTOs and Industry Associations?

Legend: ■ At least once per month ■ At least quarterly ■ At least annually ■ Less often than annually ■ Don't use

Category	At least once per month	At least quarterly	At least annually	Less often than annually	Don't use
Regional analysis (e.g. impact of event; regional…)	79.3%	17.2%	3.5%		
Understanding trends in visitor patterns	67.9%	32.1%			
Market Intelligence	67.9%	21.4%	7.1%	3.6%	
Monitoring and benchmarking performance	67.9%	21.4%	7.1%	3.6%	
Understanding trends in performance	67.9%	32.1%			
Reporting	64.3%	21.4%	14.3%		
As a proxy for visitor volumes and flows	55.6%	33.3%	11.1%		
Reporting on KPIs	44.4%	29.6%	22.2%	3.7%	
Media queries	37.0%	48.2%	11.1%	3.7%	
Planning for capacity	30.8%	19.2%	38.5%	7.7%	3.9%
Feasibility studies (e.g. demand forecasting)	29.6%	33.3%	14.8%	14.8%	7.4%
Forecasting	25.9%	44.4%	25.9%	3.7%	
Lobbying purposes	23.1%	50.0%	19.2%	7.7%	

Figure 3: How important is Accommodation Survey data to RTOs and Industry Associations?

Legend: ■ Important ■ Not Important ■ Don't use

Category	Important	Not Important	Don't use
Understanding trends in performance	100%		
Regional analysis (e.g. impact of event; regional…)	100%		
Annual reporting	97%	3%	
Understanding trends in visitor patterns	97%	3%	
Market Intelligence	97%	3%	
Monitoring and benchmarking performance	94%	6%	
Quarterly reporting	93%	7%	
Reporting on KPIs	90%	10%	
As a proxy for visitor volumes and flows	90%	10%	
Lobbying purposes	90%	10%	
Forecasting	90%	10%	
Feasibility studies (e.g. demand forecasting)	90%	10%	
Media queries	87%	13%	
Monthly reporting	86%	14%	
Planning for capacity	79%	21%	

Figure 4: Overall, how useful is Accommodation Survey data for RTOs and Industry Associations?

Category	Percentage
Very useful	24.1%
Quite useful	51.7%
Not that useful	20.7%
Not at all useful	3.5%
Would rather not say	
Don't know	
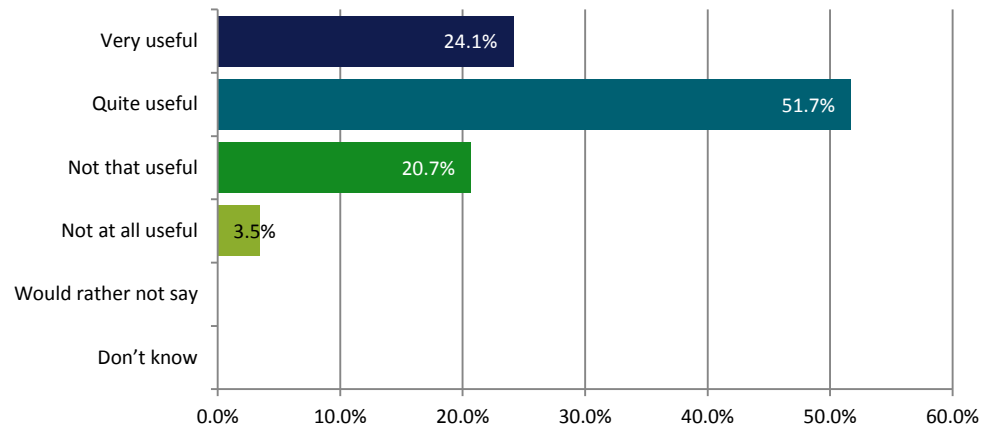
Figure 5: How could the Accommodation Survey data better meet RTO and Industry Association needs?

Category	Percentage
Greater Coverage	66.7%
Greater Breakdown	14.8%
Faster Results	14.8%
Accessibility	3.7%
It's Fine As Is	
Data Quality Concerns	
It's Irrelevant	
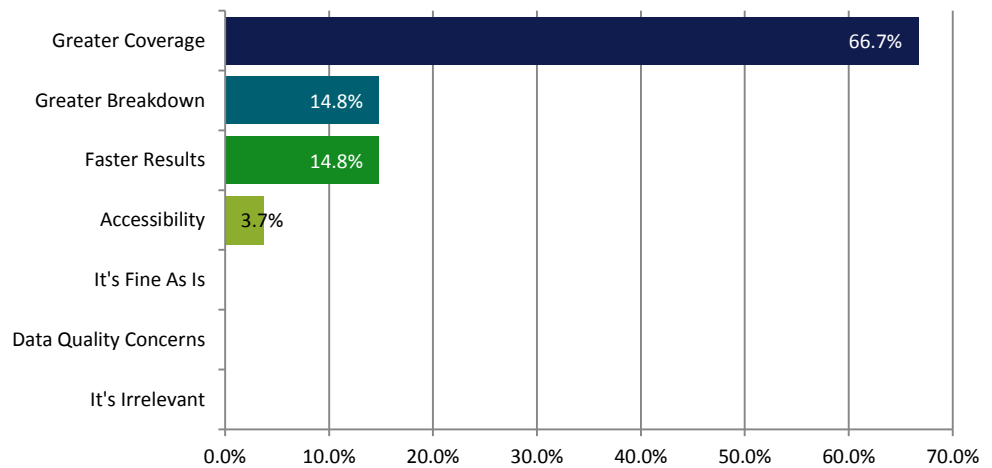
Findings

- RTOs and Industry Associations were the most likely group to view each of the use categories as important to their organisations (figure 3).

- While this group emphasise the importance of the Accommodation Survey data, their perception of the overall usefulness of the data is less pronounced. A relatively small proportion of the group (24.1 percent) viewed the Accommodation Survey data as 'very useful', while 51.7 percent indicated the data was 'quite useful', and a further 20.7 percent of the group regarded the data as 'not that useful' (figure 4).

- The majority of the group (66.7 percent) identified the lack of coverage of the entire accommodation market as a pertinent issue, particularly in areas that are popular for non-commercial types of accommodation (figure 5).

- A greater breakdown of results (by geographic area and/or country of origin) was identified as important by 14.8 percent of the group. And a further 14.8 percent of respondents identified the need for the data to be available in a timelier manner.

Section 2: Central and Local Government

This group is made up of Local and Central Government respondents, including crown entities and Regional Council's; 19 respondents (10 percent of the sample).

Figure 6: How often is Accommodation Survey data used by Central and Local Government?

Legend: ■ At least once per month ■ At least quarterly ■ At least annually ■ Less often than annually ■ Don't use

Category	At least once per month	At least quarterly	At least annually	Less often than annually	Don't use
Monitoring and benchmarking performance	53.3%	13.3%	20.0%		13.3%
Reporting	50.0%	18.8%	12.5%	6.3%	12.5%
Regional analysis (e.g. impact of event; regional…	50.0%	22.2%	27.8%		
Feasibility studies (e.g. demand forecasting)	46.2%	7.7%		23.1%	23.1%
Understanding trends in visitor patterns	44.4%	38.9%		5.6%	11.1%
Market Intelligence	43.8%	31.3%	6.3%		18.8%
Understanding trends in performance	43.8%	25.0%	31.3%		
As a proxy for visitor volumes and flows	42.9%	21.4%	14.3%		21.4%
Reporting on KPIs	42.9%	7.1%	7.1%		42.9%
Media queries	40.0%		20.0%	13.3%	26.7%
Lobbying purposes	40.0%	6.7%		13.3%	40.0%
Forecasting	35.7%	7.1%		28.6%	28.6%
Planning for capacity	33.3%	6.7%	6.7%	13.3%	40.0%

Figure 7: How important is Accommodation Survey data to Central and Local Government?

Legend: ■ Important ■ Not Important ■ Don't use

Category	Important	Not Important	Don't use
Understanding trends in performance	94%	6%	
Regional analysis (e.g. impact of event; regional…	88%	12%	
Annual reporting	88%	6%	6%
Understanding trends in visitor patterns	81%	6%	13%
As a proxy for visitor volumes and flows	75%	6%	19%
Monitoring and benchmarking performance	73%	13%	13%
Quarterly reporting	73%	13%	13%
Market Intelligence	67%	13%	20%
Monthly reporting	67%	27%	7%
Feasibility studies (e.g. demand forecasting)	59%	18%	24%
Planning for capacity	56%	13%	31%
Lobbying purposes	53%	7%	40%
Forecasting	53%	20%	27%
Media queries	50%	25%	25%
Reporting on KPIs	40%	20%	40%

Figure 8: Overall, how useful is Accommodation Survey data for Central and Local Government?
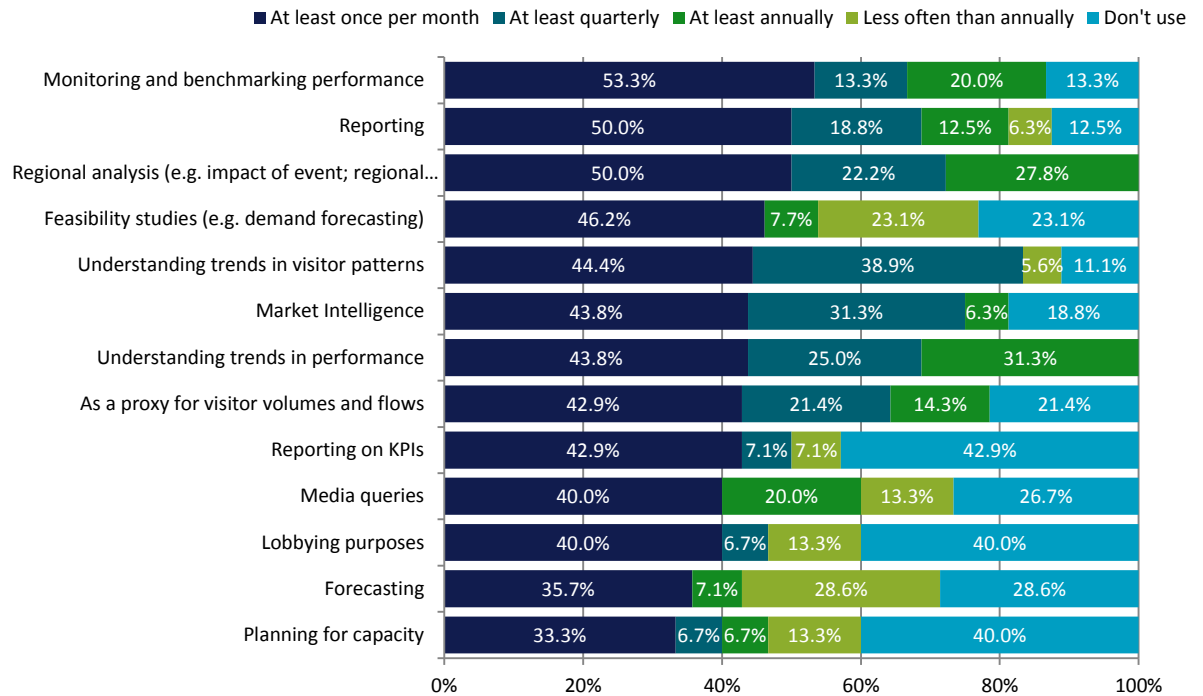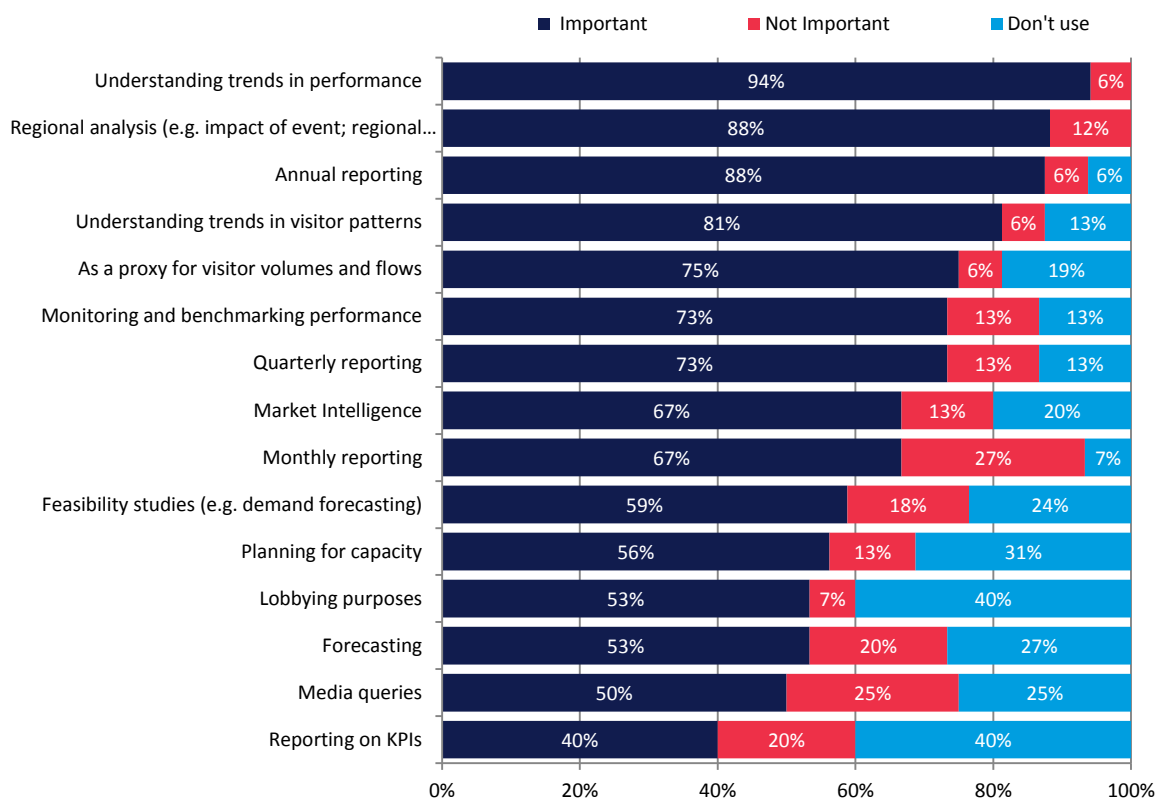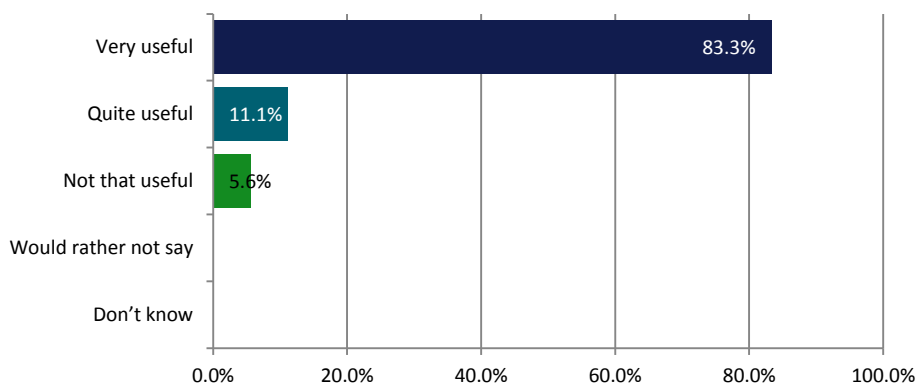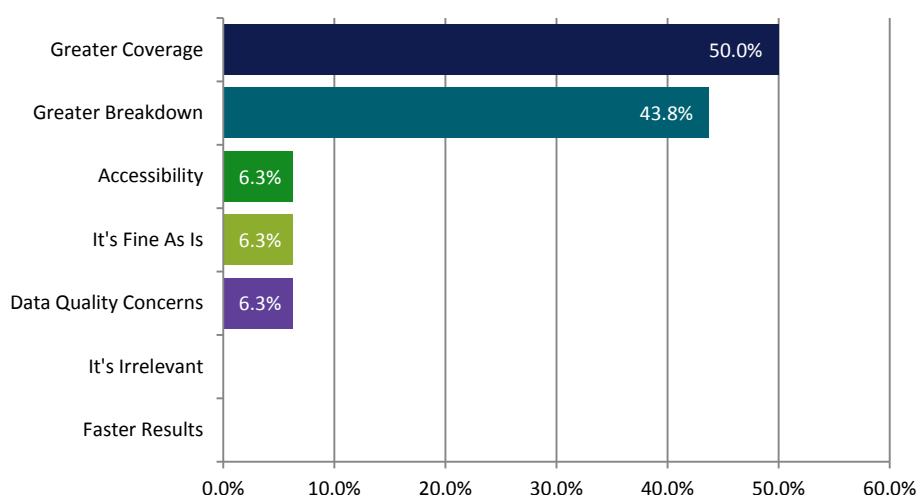

Figure 9: How could the Accommodation Survey data better meet Central and Local Government needs?

Findings

- The importance of Accommodation Survey data across different use categories is shown in Figure 7. Accommodation Survey data was often viewed as important for understanding trends in performance (94 percent), for undertaking regional analysis (88 percent), and for annual reporting purposes (88 percent).

- Central and Local Government are less frequent users of Accommodation Survey data compared to RTOs and Industry Associations, and ascribe relatively less importance to each use category (compare figure 3 to figure 7).

- Though less frequent users, Central and Local Government were the most likely group to view the Accommodation Survey data as 'very useful' overall (83 percent of respondents), as shown in figure 8.

- Half of the group mentioned that greater coverage of the unmeasured sector was required to better meet their organisation's accommodation data needs. 44 percent of respondents also viewed a greater breakdown, or more granular decomposition of results (by geographic area and/or country of origin), as desirable.

Section 3: Tourism Business Operators

This group includes respondents from Hotels, Motels, Holiday Parks and Backpackers, and from businesses involved in tourism based activities and services. The questionnaire received 116 responses in this group (61 percent of the sample).

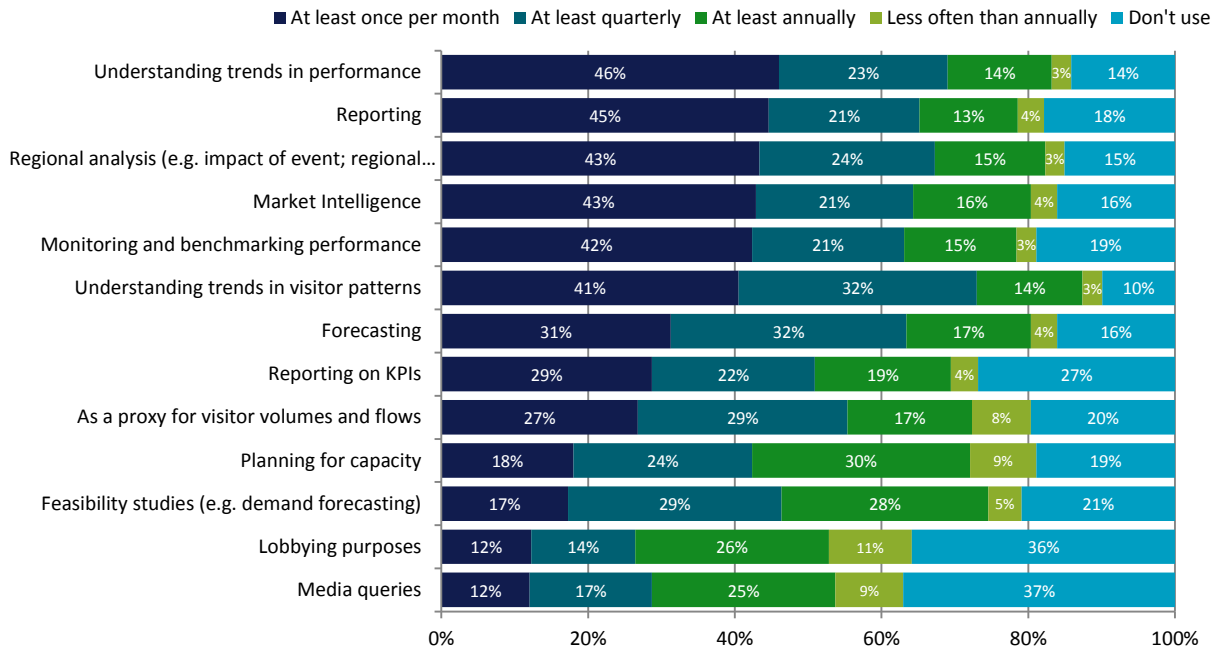**Figure 10: How often is Accommodation Survey data used by tourism business operators?**

Legend: ■ At least once per month ■ At least quarterly ■ At least annually ■ Less often than annually ■ Don't use

Category	At least once per month	At least quarterly	At least annually	Less often than annually	Don't use
Understanding trends in performance	46%	23%	14%	3%	14%
Reporting	45%	21%	13%	4%	18%
Regional analysis (e.g. impact of event; regional…	43%	24%	15%	3%	15%
Market Intelligence	43%	21%	16%	4%	16%
Monitoring and benchmarking performance	42%	21%	15%	3%	19%
Understanding trends in visitor patterns	41%	32%	14%	3%	10%
Forecasting	31%	32%	17%	4%	16%
Reporting on KPIs	29%	22%	19%	4%	27%
As a proxy for visitor volumes and flows	27%	29%	17%	8%	20%
Planning for capacity	18%	24%	30%	9%	19%
Feasibility studies (e.g. demand forecasting)	17%	29%	28%	5%	21%
Lobbying purposes	12%	14%	26%	11%	36%
Media queries	12%	17%	25%	9%	37%

Figure 11: How important is Accommodation Survey data to tourism business operators?

Legend: ■ Important ■ Not Important ■ Don't Use

Category	Important	Not Important	Don't Use
Reporting on KPIs	79%	12%	9%
Understanding trends in visitor patterns	79%	13%	8%
Understanding trends in performance	79%	12%	10%
Planning for capacity	76%	13%	11%
Regional analysis (e.g. impact of event; regional…	75%	15%	10%
Monthly reporting	74%	13%	12%
Media queries	70%	18%	12%
Forecasting	69%	18%	13%
Monitoring and benchmarking performance	68%	20%	13%
Quarterly reporting	67%	19%	14%
Lobbying purposes	66%	19%	15%
Feasibility studies (e.g. demand forecasting)	66%	18%	16%
Market Intelligence	63%	25%	13%
As a proxy for visitor volumes and flows	50%	24%	25%
Annual reporting	40%	34%	26%

Figure 12: Overall, how useful is Accommodation Survey data for tourism business operators?

Very useful	47.4%
Quite useful	33.3%
Not that useful	9.7%
Not at all useful	6.1%
Would rather not say	1.8%
Don't know	1.8%
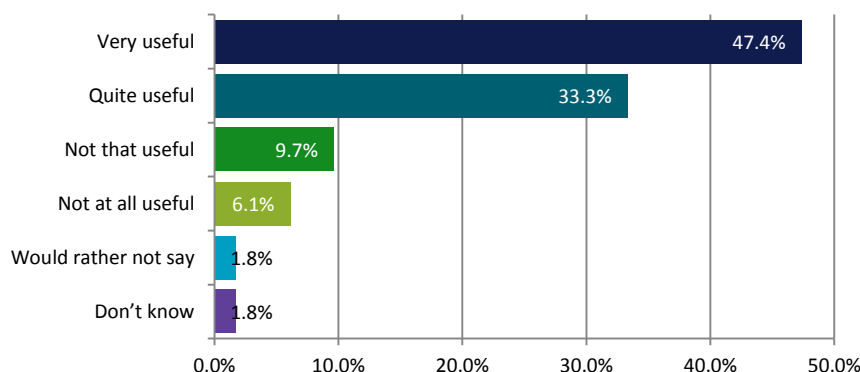
Figure 13: How could the Accommodation Survey data better meet tourism business operator's needs?

Greater Coverage	20.3%
It's Fine As Is	17.6%
Greater Breakdown	13.5%
Data Quality Concerns	6.8%
Faster Results	6.8%
It's Irrelevant	2.7%
Accessibility	2.7%
Data Commentary/ Data Insights	1.4%
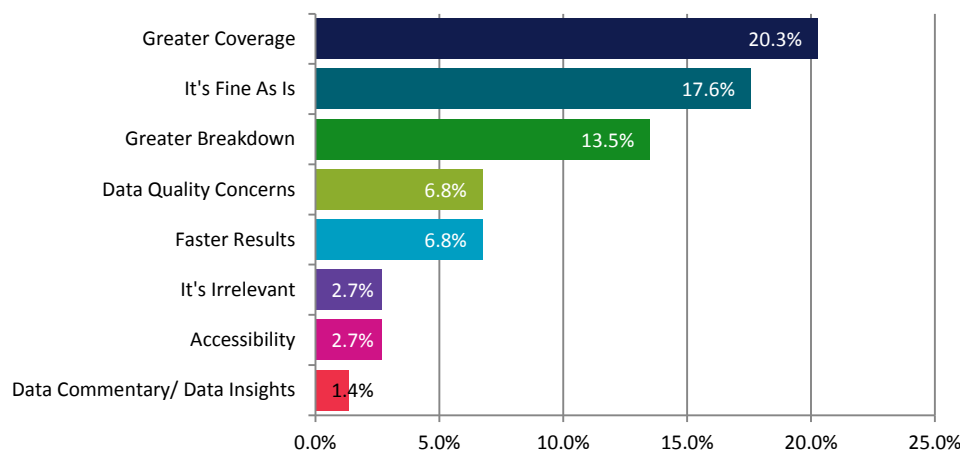
Findings

- Figure 11 shows the relative importance of Accommodation Survey data across different use categories. Reporting on KPIs (79 percent), understanding trends in visitor patterns (79 percent), and understanding trends in performance (79 percent), were most frequently regarded as important.

- Overall, tourism business operators predominantly viewed Accommodation Survey data as 'very useful' (47.4 percent). A further 33 percent of tourism business operators viewed the data as 'quite useful' (figure 12).

- Comments on how the Accommodation Survey data could better meet the needs of tourism business operators varied. Figure 13 shows that 20 percent of respondents mentioned that greater coverage of the unmeasured sector was desirable (e.g. coverage of Airbnb), while 18 percent of tourism business operators stated that the Accommodation Survey was fine as it currently is.

- A further 14 percent of respondents indicated a more granular breakdown of results (by geographic area and/or country of origin) was important.