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Commercial Accommodation Monitor:

February 2016

Northland

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Preface

Commercial Accommodation Monitor: February 2016 – Northland presents comprehensive and impartial information on short-term commercial accommodation for the Northland Regional Tourism Organisation (RTO) area, from the Accommodation Survey. This survey is run by Statistics New Zealand on behalf of the Ministry of Business, Innovation & Employment.

The data relates to the areas covered by the following local authorities:

- Far North District
- Kaipara District
- Whangarei District.

Comparisons of monthly data with the same month of the previous year need to be treated with caution, as data for one period may be influenced by events for which there is no equivalent in the previous period (eg Chinese New Year, Easter).

For further data and commentary, see the monthly Accommodation Survey Hot Off the Press, and the monthly pivot tables – with variables by RTO and local authority area – both available on the Statistics NZ website (www.stats.govt.nz).

The March 2016 monitor will be released on 11 May 2016.

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 Statistics New Zealand, except where otherwise stated. Both administrative and survey data has been used in this report.

Liability

While all care and diligence has been used in processing, analysing and extracting data and information in this report, Statistics NZ gives no warranty it is error free and will not be liable for any loss or damage suffered as a result of the use, directly or indirectly, of information in this report.

Statistics New Zealand Information Centre

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

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

Contact for the Commercial Accommodation Monitor

John Gudgeon or Craig Liken
Wellington 04 931 4600
Email: info@stats.govt.nz

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1 Highlights

Monthly highlights

In February 2016 compared with February 2015:

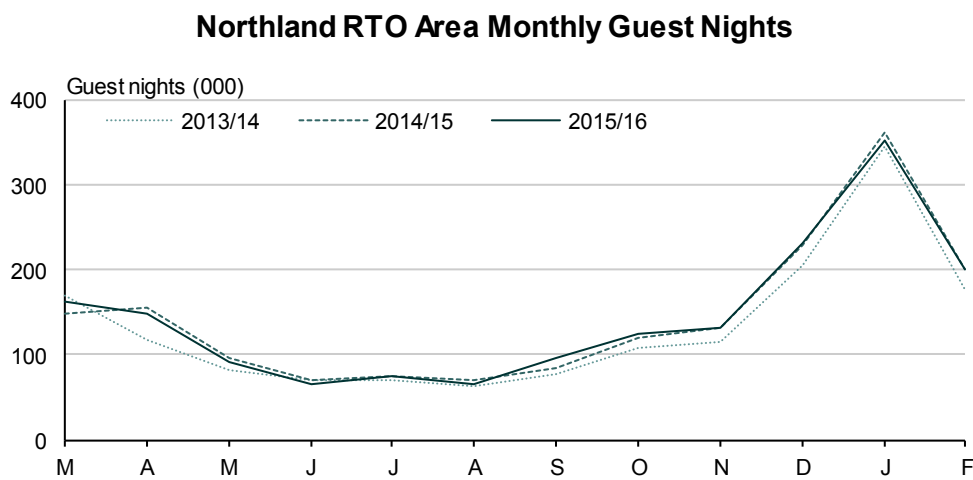
- Guest nights rose 0.4 percent to 200,942
- International guest nights rose 5.8 percent to 92,168
- Domestic guest nights fell 3.9 percent to 108,775
- The average length of stay fell from 2.11 nights to 2.08 nights
- The overall occupancy rate fell from 37.4 percent to 36.4 percent
- The occupancy rate, excluding holiday parks, was 63.3 percent in February 2016
- Accommodation capacity, excluding holiday parks, rose 6.5 percent.

Response rates for February 2016

The response rate for the Northland RTO area was 84 percent for February 2016.

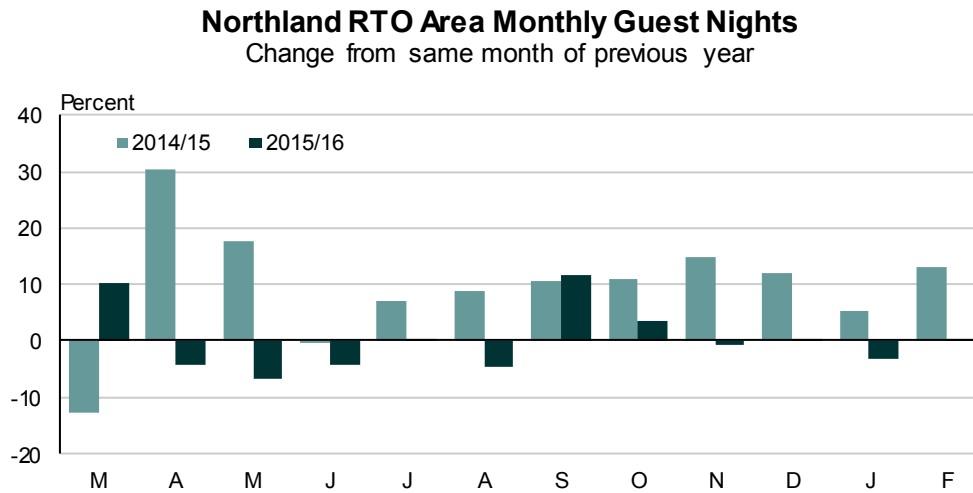
The proportion of the origin-of-guest estimate from unadjusted data was 70 percent.

Figure 1.1



Source: Statistics New Zealand

Figure 1.2



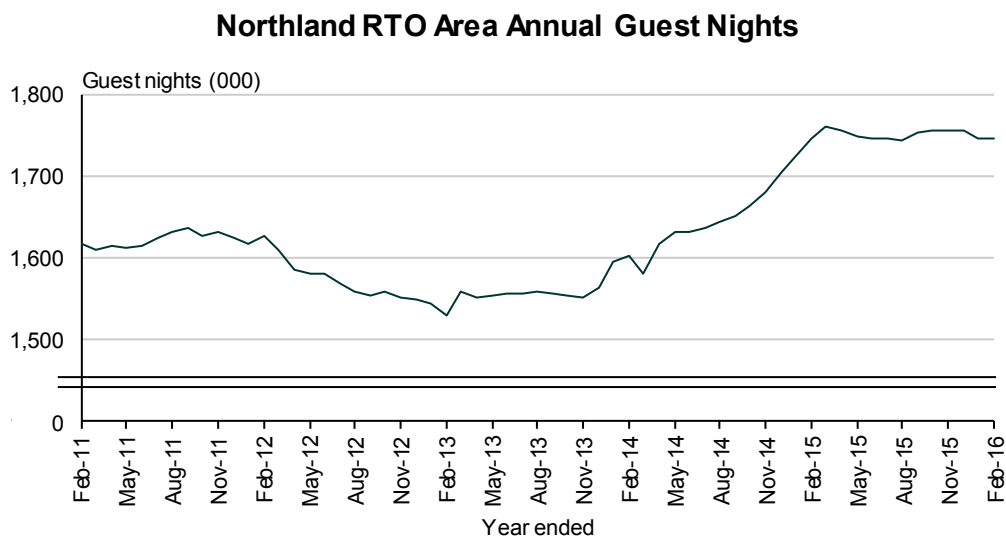
Source: Statistics New Zealand

Year ended highlights

For the year ended February 2016 compared with the previous year:

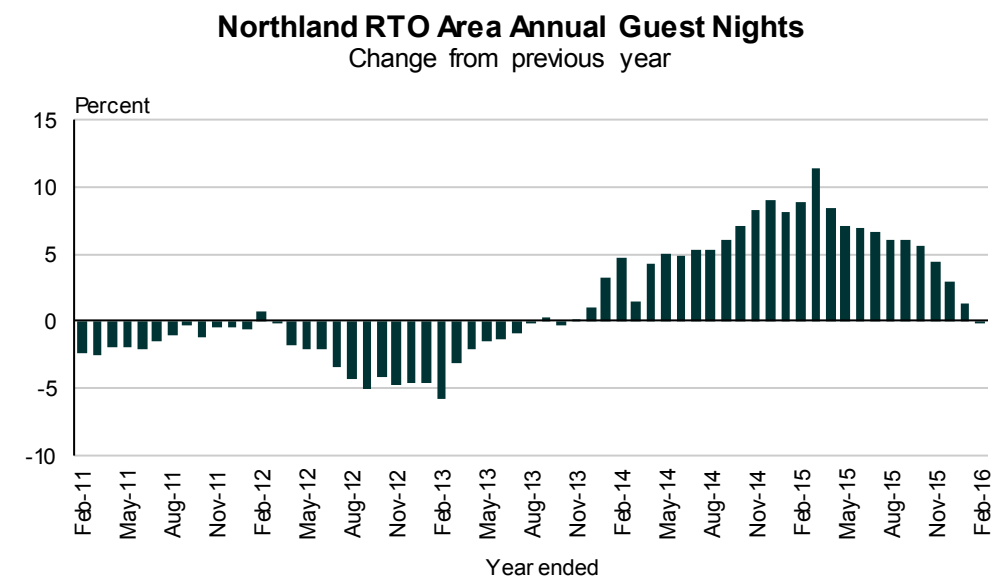
- Guest nights were almost unchanged at 1,745,192
- International guest nights rose 2.7 percent to 616,906
- Domestic guest nights fell 1.5 percent to 1,128,286
- The average length of stay fell from 2.24 nights to 2.20 nights
- The overall occupancy rate fell from 26.1 percent to 25.8 percent
- The occupancy rate, excluding holiday parks, was 43.0 percent for the year ended February 2016
- Accommodation capacity, excluding holiday parks, fell 1.4 percent.

Figure 1.3



Source: Statistics New Zealand

Figure 1.4



Source: Statistics New Zealand

2 Accommodation variables

In February 2016, compared with February 2015, there was an increase of 0.4 percent in total guest nights for the Northland RTO area. Backpackers had the largest increase, followed by motels. Holiday parks had the only decrease.

For the year ended February 2016, compared with the previous February year, total guest nights for the Northland RTO area were similar. Holiday parks had the largest decrease, followed by backpackers. Motels had the only increase.

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

Table 2.1

Northland Accommodation Variables

By accommodation type
Monthly and year ended⁽¹⁾⁽²⁾

Accommodation type	Monthly			Annual		
	February		Percentage change	Year ended		Percentage change
	2015	2016		February 2015	February 2016	
Guest nights						
Total guest nights	200,230	200,942	0.4	1,745,992	1,745,192	0.0
International	87,091	92,168	5.8	600,654	616,906	2.7
Domestic	113,140	108,775	-3.9	1,145,339	1,128,286	-1.5
Hotels	36,872	36,993	0.3	323,692	323,613	0.0
Motels/apartments	63,449	66,099	4.2	528,073	563,456	6.7
Backpackers	18,371	22,692	23.5	171,543	169,644	-1.1
Holiday parks	81,538	75,158	-7.8	722,685	688,478	-4.7
Occupancy rates⁽³⁾ (%)						
Hotels	59.5	60.8	2.2	41.5	42.2	1.6
Motels/apartments	66.9	69.0	3.2	46.1	48.4	5.0
Backpackers	46.3	57.7	24.7	34.9	36.4	4.2
Holiday parks	23.2	19.1	-17.4	15.7	14.6	-7.4
Total	37.4	36.4	-2.7	26.1	25.8	-1.2
Total excluding holiday parks ⁽⁴⁾	58.3	63.3	8.6	41.3	43.0	4.1
Average length of stay⁽⁵⁾						
Hotels	1.79	1.75	-2.4	1.88	1.82	-3.1
Motels/apartments	2.03	1.99	-2.1	2.01	2.00	-0.3
Backpackers	2.24	2.51	12.2	2.57	2.23	-13.2
Holiday parks	2.33	2.27	-2.4	2.59	2.65	2.6
Total	2.11	2.08	-1.2	2.24	2.20	-1.7
Guest arrivals						
Hotels	20,561	21,126	2.7	172,032	177,514	3.2
Motels/apartments	31,197	33,191	6.4	262,810	281,297	7.0
Backpackers	8,212	9,045	10.1	66,837	76,167	14.0
Holiday parks	34,994	33,051	-5.6	279,280	259,321	-7.1
Total	94,964	96,414	1.5	780,958	794,299	1.7
Establishments						
Hotels	29	28	-3.4	29	28	-3.4
Motels/apartments	131	128	-2.3	131	128	-2.3
Backpackers	27	26	-3.7	27	26	-3.7
Holiday parks	47	47	0.0	47	47	0.0
Total	234	229	-2.1	234	229	-2.1
Capacity⁽⁶⁾						
Hotels	33,321	33,466	0.4	424,217	420,509	-0.9
Motels/apartments	45,849	45,994	0.3	569,235	573,061	0.7
Backpackers	36,221	33,002	-8.9	430,568	410,790	-4.6
Holiday parks	169,331	175,305	3.5	2,103,300	2,165,843	3.0
Total	274,904	287,767	4.7	3,527,320	3,570,203	1.2

(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:

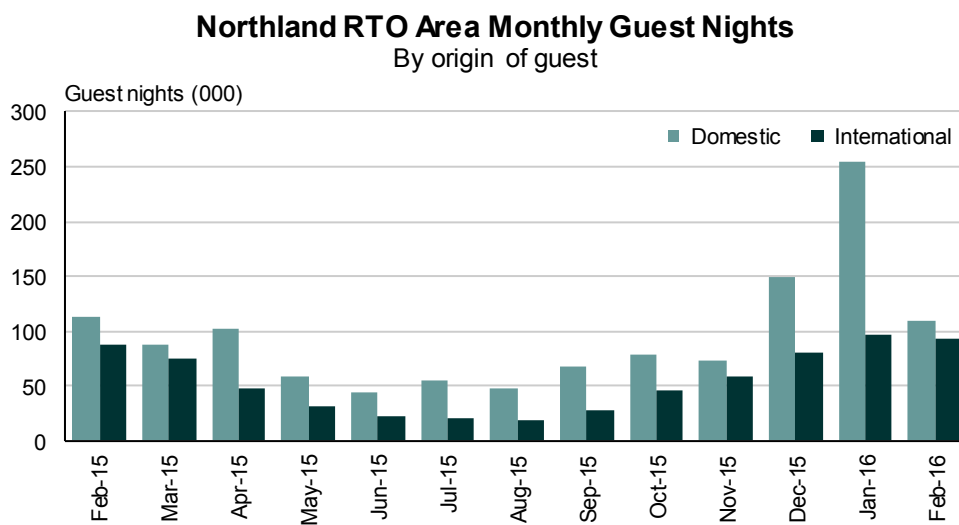
C confidential

3 Origin of guests

In February 2016, international guests accounted for 45.9 percent of all guest nights in the Northland RTO area. When compared with February 2015, the number of international guest nights spent in the area in February 2016 was up 5.8 percent to 92,168. Domestic guest nights decreased 3.9 percent, to 108,775, for the same period.

The proportion of the origin-of-guest estimate from actual data was 70 percent for February 2016.

Figure 3.1



Source: Statistics New Zealand

Table 3.1

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

		Northland RTO ⁽¹⁾ area			New Zealand		
		Origin of guest		Total	Origin of guest		Total
		Domestic	International		Domestic	International	
Month							
2015	Feb	113,140	87,091	200,230	1,900,787	1,803,851	3,704,638
	Mar	88,171	75,447	163,618	1,927,366	1,624,619	3,551,985
	Apr	101,567	46,864	148,431	1,877,594	1,246,428	3,124,021
	May	59,126	31,601	90,727	1,463,648	874,729	2,338,377
	Jun	44,312	21,663	65,975	1,241,206	691,988	1,933,195
	Jul	55,102	19,840	74,942	1,597,300	869,716	2,467,016
	Aug	47,074	19,390	66,464	1,473,688	827,051	2,300,740
	Sep	67,268	27,955	95,223	1,588,557	887,062	2,475,619
	Oct	78,589	45,326	123,915	1,772,303	1,061,184	2,833,487
	Nov	73,450	58,628	132,078	1,695,774	1,411,223	3,106,997
	Dec	149,982	80,908	230,891	2,164,026	1,687,843	3,851,869
2016	Jan	254,870	97,116	351,986	2,922,729	1,921,161	4,843,891
	Feb	108,775	92,168	200,942	2,017,277	1,948,236	3,965,513
Percent change from the current month of the previous year							
		-3.9	5.8	0.4	6.1	8.0	7.0
Year ended							
	February 2015	1,145,339	600,654	1,745,992	20,929,094	14,039,727	34,968,819
	February 2016	1,128,286	616,906	1,745,192	21,741,468	15,051,241	36,792,709
Percent change from previous year							
		-1.5	2.7	0.0	3.9	7.2	5.2

(1) Regional tourism organisation

4 National results

In February 2016, a total of 3,966,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 261,000 nights (7.0 percent) from February 2015.

All four accommodation types recorded an increase in guest nights in February 2016, compared with February 2015. Holiday parks had the largest increase in guest nights (up 83,000 or 10.2 percent), followed by hotels (up 66,000 or 5.5 percent), motels (up 60,000 or 5.1 percent), and backpacker accommodation (up 51,000 or 10.3 percent).

For the year ended February 2016, there were 36,793,000 guest nights, an increase of 1,824,000 (5.2 percent) from the previous February year.

Refer to Table 4.1 for comparisons of data.

Table 4.1

Northland and New Zealand Guest Nights

*By accommodation type
Monthly and year ended*

Accommodation type	Total guest nights			Percentage change	
	2014	2015	2016	2014 to 2015	2015 to 2016
February month					
Northland RTO area					
Hotels	36,840	36,872	36,993	0.1	0.3
Motels	55,194	63,449	66,099	15.0	4.2
Backpackers	17,448	18,371	22,692	5.3	23.5
Holiday parks	67,767	81,538	75,158	20.3	-7.8
Total	177,249	200,230	200,942	13.0	0.4
New Zealand					
Hotels	1,145,637	1,201,344	1,267,550	4.9	5.5
Motels	1,121,754	1,187,558	1,247,815	5.9	5.1
Backpackers	494,840	500,052	551,435	1.1	10.3
Holiday parks	752,679	815,685	898,712	8.4	10.2
Total	3,514,910	3,704,638	3,965,513	5.4	7.0
Year ended February					
Northland RTO area					
Hotels	299,002	323,692	323,613	8.3	0.0
Motels	488,200	528,073	563,456	8.2	6.7
Backpackers	160,855	171,543	169,644	6.6	-1.1
Holiday parks	655,623	722,685	688,478	10.2	-4.7
Total	1,603,679	1,745,992	1,745,192	8.9	0.0
New Zealand					
Hotels	11,588,331	12,341,264	13,017,492	6.5	5.5
Motels	10,764,764	11,073,408	11,608,071	2.9	4.8
Backpackers	4,478,536	4,820,406	5,032,844	7.6	4.4
Holiday parks	6,389,684	6,733,740	7,134,302	5.4	5.9
Total	33,221,315	34,968,819	36,792,709	5.3	5.2

5 Regional comparison

In February 2016, Wellington recorded the largest increase in guest nights (up 23,000 or 9.6 percent) from February 2015. This was followed by Queenstown (up 22,000 or 7.4 percent), Auckland (up 20,000 or 2.9 percent), Canterbury (up 18,000 or 5.1 percent), and Rotorua (up 16,000 or 8.4 percent).

Gisborne recorded the largest decrease (down 1,000 or 1.6 percent), followed by Whanganui (down 200 or 1.0 percent). No other RTO areas showed a decrease.

Table 5.1

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

RTO area	February guest nights								
	Domestic			International			Total		
	2015	2016	Percent age change	2015	2016	Percent age change	2015	2016	Percent age change
Northland	113,140	108,775	-3.9	87,091	92,168	5.8	200,230	200,942	0.4
Auckland	350,458	348,995	-0.4	313,382	334,416	6.7	663,840	683,411	2.9
Coromandel	60,940	59,823	-1.8	40,723	41,959	3.0	101,663	101,783	0.1
Waikato	83,343	88,190	5.8	34,267	41,596	21.4	117,609	129,785	10.4
Bay of Plenty	71,350	79,307	11.2	29,406	27,715	-5.8	100,756	107,021	6.2
Rotorua	79,918	83,894	5.0	111,027	123,182	10.9	190,945	207,076	8.4
Taupo	55,490	61,827	11.4	44,904	47,469	5.7	100,394	109,296	8.9
Whakatane-									
Kaw erau	18,118	23,631	30.4	4,949	8,671	75.2	23,068	32,303	40.0
Gisborne	27,824	27,787	-0.1	7,068	6,539	-7.5	34,892	34,326	-1.6
Taranaki	42,971	52,932	23.2	9,576	12,213	27.5	52,547	65,145	24.0
Haw ke's Bay	72,398	77,675	7.3	35,145	42,783	21.7	107,543	120,458	12.0
Ruapehu	18,979	22,217	17.1	22,640	20,933	-7.5	41,620	43,150	3.7
Manaw atu	42,056	45,614	8.5	5,554	6,794	22.3	47,609	52,408	10.1
Whanganui	14,173	13,379	-5.6	4,813	5,409	12.4	18,986	18,788	-1.0
Wairarapa	17,988	20,534	14.2	3,826	7,183	87.7	21,814	27,717	27.1
Kapiti-Horow henua	22,301	24,109	8.1	3,993	4,266	6.8	26,295	28,375	7.9
Wellington	135,079	163,953	21.4	99,136	92,841	-6.4	234,215	256,794	9.6
Marlborough	41,176	38,794	-5.8	44,815	53,053	18.4	85,991	91,847	6.8
Nelson-Tasman	107,539	116,534	8.4	77,009	80,588	4.6	184,548	197,122	6.8
Canterbury	165,236	170,816	3.4	189,750	202,171	6.5	354,985	372,987	5.1
Hurunui	22,981	26,107	13.6	11,450	13,934	21.7	34,431	40,042	16.3
Mackenzie	12,523	17,679	41.2	54,280	56,775	4.6	66,804	74,454	11.5
Timaru	20,611	22,399	8.7	13,040	12,396	-4.9	33,650	34,795	3.4
West Coast	53,967	57,964	7.4	115,780	125,355	8.3	169,747	183,319	8.0
Wanaka	26,603	29,456	10.7	59,842	62,617	4.6	86,445	92,073	6.5
Queenstow n	69,467	72,994	5.1	230,017	248,740	8.1	299,484	321,734	7.4
Waitaki	26,011	27,791	6.8	21,198	23,872	12.6	47,209	51,663	9.4
Central Otago	24,227	24,387	0.7	8,152	9,773	19.9	32,379	34,160	5.5
Dunedin	49,119	53,055	8.0	46,684	49,376	5.8	95,803	102,431	6.9
Clutha	7,066	7,632	8.0	5,582	6,480	16.1	12,647	14,112	11.6
Fiordland	21,023	18,527	-11.9	50,444	64,545	28.0	71,467	83,072	16.2
Southland	26,715	30,498	14.2	18,310	22,425	22.5	45,025	52,923	17.5
Total	1,900,787	2,017,277	6.1	1,803,851	1,948,236	8.0	3,704,638	3,965,513	7.0

Table 5.2

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

RTO area	February 2016 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks ⁽²⁾
	Percent					
Northland	60.8	69.0	57.7	19.1	36.4	63.3
Auckland	91.2	79.4	64.4	31.4	75.5	82.3
Coromandel	59.7	66.5	48.1	26.6	36.4	58.4
Waikato	71.1	67.8	42.5	27.0	48.2	62.3
Bay of Plenty	67.8	76.0	36.5	26.0	41.5	58.4
Rotorua	83.4	79.7	35.2	31.4	56.0	62.3
Taupo	72.1	73.1	65.3	24.2	54.7	70.0
Whakatane-Kaw erau	C	66.4	C	C	28.5	C
Gisborne	C	62.2	C	15.7	28.4	49.8
Taranaki	51.8	74.0	38.9	28.4	46.5	58.6
Haw ke's Bay	70.1	76.1	67.8	27.5	54.8	72.2
Ruapehu	48.3	39.2	29.7	41.6	37.7	36.9
Manaw atu	46.0	63.8	C	C	45.9	C
Whanganui	C	60.0	32.6	C	35.3	C
Wairarapa	C	68.5	C	18.0	34.1	56.2
Kapiti-Horow henua	C	68.9	C	17.8	28.8	42.0
Wellington	90.1	80.2	C	C	78.4	C
Marlborough	79.4	80.9	51.2	33.0	54.8	65.3
Nelson-Tasman	79.2	83.3	70.8	33.5	54.0	77.2
Canterbury	82.5	80.6	50.3	31.7	57.3	70.9
Hurunui	C	68.0	C	25.9	40.4	52.4
Mackenzie	84.7	69.1	83.5	45.7	67.7	78.5
Timaru	C	79.6	C	29.0	45.2	66.9
West Coast	67.8	83.8	74.8	44.4	65.1	75.1
Wanaka	79.7	82.1	71.7	41.3	58.7	76.9
Queenstow n	90.8	81.3	85.0	54.5	82.3	87.2
Waitaki	50.4	82.2	65.2	9.5	20.8	63.9
Central Otago	31.4	75.7	31.3	11.5	20.2	48.2
Dunedin	87.1	88.9	67.3	60.4	78.8	83.2
Clutha	C	62.5	C	35.1	40.7	50.0
Fiordland	86.9	78.9	66.2	49.6	67.5	75.8
Southland	59.4	65.0	60.0	27.0	50.6	61.9
Total	80.3	75.3	57.1	27.4	55.0	71.2

(1) Occupancy rates are calculated as the ratio of stay unit nights to monthly capacity.

(2) Occupancy rates excluding holiday parks are included because the capacity of holiday parks can distort the total occupancy rates.

Symbols:

C confidential

... not applicable

6 Local authority area results

Table 6.1 shows results for the individual local authority areas in the Northland RTO area.

Table 6.1

Local Authority and Northland Accommodation Results⁽¹⁾

Accommodation type	February 2016 results				
	Establish-ments	Capacity	Guest Nights	Average stay length	Occupancy rate
	Number			Days	Percent
Far North District					
Hotels	19	24,331	30,679	1.80	66.72
Motels	91	29,899	46,886	2.07	73.45
Backpackers	21	29,377	21,131	2.55	60.21
Holiday parks	25	93,322	37,411	2.56	19.04
Total	156	176,929	136,106	2.17	41.63
Whangarei District					
Hotels	6	7,656	C	C	C
Motels	30	14,065	17,792	1.90	64.22
Backpackers	3	2,581	C	C	C
Holiday parks	14	54,462	24,297	2.16	20.71
Total	53	78,764	48,911	1.97	31.63
Kaipara District					
Hotels	3	1,479	C	C	C
Motels	7	2,030	1,421	1.25	37.20
Backpackers	2	1,044	C	C	C
Holiday parks	8	27,521	13,450	1.87	16.41
Total	20	32,074	15,925	1.79	19.21
Northland Regional Tourism Organisation area					
Hotels	28	33,466	36,993	1.75	60.84
Motels	128	45,994	66,099	1.99	69.03
Backpackers	26	33,002	22,692	2.51	57.73
Holiday parks	47	175,305	75,158	2.27	19.15
Total	229	287,767	200,942	2.08	36.39

(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

Population

The target population for the Accommodation Survey is all 'geographic units' (called 'establishments' in this publication) that are classified as short-term (less than one month) commercial accommodation providers operating in New Zealand. In terms of the Australian and New Zealand Standard Industrial Classification 2006 (ANZSIC06), the target population is taken from class 4400 (accommodation), and the part of class 4520 (pubs, taverns, and bars) that also provides accommodation.

The survey frame is all short-term commercial accommodation-providing geographic units belonging to an economically significant enterprise. Economic significance is generally determined as being GST registered and having a turnover of at least \$30,000 per year. Any geographic unit classified as a hosted accommodation type is excluded from the survey.

Confidentiality and suppression

Data collected and information contained in this report must conform to the provisions of the Statistics Act 1975. This requires that published information maintains the confidentiality of respondents. Cell suppression has been used to prevent the disclosure of sensitive information and is represented by a 'C' in the tables.

Rounding is applied to produce 'confidentialised' data. The rounding to 'origin of guest' data means that subtotals may not add up to the totals shown.

Some data have been suppressed due to low response rates. These are represented by 'S' in the tables.

Data reliability

This survey aims for 100 percent coverage of the population (a full census). However, in practice an overall response rate of between 76 and 80 percent is usually achieved. The remaining units are given imputed values based on the characteristics of similar establishments in the same or similar regions. Imputation 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 occur for reasons such as respondent error, frame quality, and errors in processing. While every effort is made to minimise these errors, they will still occur. It is not possible to quantify their effect.

Comparison with other statistical sources

Care should be used when comparing statistics from the Accommodation Survey with other sources. The target populations and methodologies may not be comparable. For example, 'average length of stay' figures from the Accommodation Survey combine international and domestic guests, whereas the average length of stay figures published from the International Visitor Survey cover only international guests.

Classifications and definitions

Accommodation type is generally determined by the type that contributes the majority of an establishment's capacity. For instance, if a business provides both motel and camping ground accommodation, but the majority of its stay units are motel rooms, then it would be classified as a motel. The classification system used is the New Zealand Accommodation Classification, broadly defined below:

- Hotels: includes both hotels and resorts
- Motels: includes motor inns, apartments, and motels
- Backpackers/hostels
- Caravan parks/camping grounds.

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.

Further information is available on the Tourism Research website, www.tourismresearch.govt.nz or on request from Statistics New Zealand.

For definitions of other terms, please search for 'survey participants accommodation survey' on the Statistics NZ website (www.stats.govt.nz).