Tourism

Statistics Bulletin

NORTHERN IRELAND HOTEL, BED & BREAKFAST AND GUESTHOUSE OCCUPANCY SURVEY

(JANUARY-DECEMBER 2013)

Published 29/05/14

This report provides the analysis of the most recent (January-December 2013) annual information from the Occupancy Survey for Hotels, Bed & Breakfasts and Guesthouses in Northern Ireland. The figures show:

- Average room occupancy in hotels during 2013 was 64%, a decrease of 1 percentage point from 2012. Bed-space occupancy experienced a decrease of 2 percentage points to 44%.

- Average room occupancy for Guesthouses and Bed & Breakfasts in the same period was 31% showing a decrease of 1 percentage point on 2012 while bed-space occupancy decreased by 2 percentage points to 22%.

- Average hotel occupancy rates were highest for 4/5 star hotels who experienced room occupancy of 69% and bed-space occupancy of 46%.

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Occupancy Rates
Average hotel room occupancy in Northern Ireland for 2013 was 64%, a decrease of 1 percentage point from 2012. Bed-space occupancy experienced a decrease of 2 percentage points to 44%.

Average room occupancy for Guesthouses and Bed & Breakfasts in the same period was 31% showing a decrease of 1 percentage point on 2012 while bed-space occupancy decreased by 2 percentage points to 22%.

Hotels with 100+ rooms experienced the highest occupancy rates of all hotels in Northern Ireland in 2013 (72% room occupancy and 52% bed-space occupancy).

Rooms and Beds Sold
An estimated 1,828,000 hotel rooms and 2,775,000 bed-spaces were sold across Northern Ireland during 2013. This showed an increase of 1% in rooms sold and a decrease of 1% in the number of bed-spaces sold compared with 2012.

At the same time, the number of rooms sold in guesthouses and bed & breakfasts decreased by 4% to an estimated 354,000 while there was a 7% decrease in the number of bed-spaces sold to 568,000.

Average Length of Stay
The average length of stay for hotels guesthouses and bed & breakfasts showed little change between 2012 and 2013 with average length of stay in hotels of 1.8 nights and average length of stay in guesthouses and bed & breakfasts remaining at 1.5 nights.

Arrivals
Visitors from Great Britain accounted for the highest proportion of arrivals to Northern Ireland hotels in 2013 (41%) while Northern Ireland residents accounted for the highest proportion of arrivals to guesthouses and bed & breakfasts (41%).

Stock (Source: Northern Ireland Tourist Board)

To offer tourist accommodation in NI, you must have a certificate from the Northern Ireland Tourist Board (NITB) - NITB refers to this as certification. It is illegal to offer tourist accommodation in NI without a certificate from NITB. The list of certified accommodation in NITB is known as the 'stock'. Table 1 shows all the available stock as registered with the Tourist Board.

Within Northern Ireland there were 138 hotels with a total of 7,893 hotel rooms and 17,661 hotel bed-spaces available at end December 2013. There was no change in the number of hotels but an increase of 2% in the number of rooms and 3% in the number of bed-spaces available, when compared with the hotel stock at end December 2012.

Table 1: Northern Ireland Stock, 2011 to 2013

	2011			2012			2013		
	Number	Room	Bed	Number	Room	Bed	Number	Room	Bed
Hotel	139	7,765	17,382	138	7,708	17,176	138	7,893	17,661
Bed & Breakfast	621	2,155	4,919	583	1,944	4,438	581	1,925	4,376
Guesthouse	121	975	2,231	112	882	2,010	106	837	1,920
Guest Accommodation	n/a	n/a	n/a	12	187	427	22	283	652

Hotel Stock
The largest share of available rooms in hotels was in the four/five star classification (41%), while the smallest share of rooms was in the one star classification (<1%). Hotels were reclassified in September 2012 therefore this report is based on the new classifications (Table 2).

Table 2: Northern Ireland Hotel stock by classification, December 2013

Classification	**Number**	**%**	**Room**	**%**	**Bed**	**%**
4/5*	39	28%	3,197	41%	7,024	40%
3*	46	33%	2,291	29%	5,266	30%
2*	4	3%	113	1%	227	1%
1*	1	1%	16	<1%	33	<1%
Unclassified	48	35%	2,276	29%	5,111	29%
Total	**138**	**100%**	**7,893**	**100%**	**17,661**	**100%**

Guesthouse and Bed & Breakfast stock

At the end of December 2013, there were a total of 709 guesthouses, bed & breakfasts and guest accommodation (GHBBGA), with a total of 3,045 rooms and 6,948 bed-spaces (Table 3). While there was virtually no change in the number of GHBBGAs the number of rooms and bed-spaces available both showed an increase of 1%, when compared with the GHBBGA stock at end December 2012.

Table 3: Northern Ireland Guesthouse and Bed & Breakfast stock, December 2013

Classification	Number	%	Room	%	Bed	%
Guesthouse	106	15%	837	27%	1,920	28%
Bed & Breakfast	581	82%	1,925	63%	4,376	63%
Guest Accommodation	22	3%	283	9%	652	9%
Total	**709**	**100%**	**3,045**	**100%**	**6,948**	**100%**

There was virtually no change over the year in the stock for bed & breakfast establishments and a 5% decrease in the stock for Guesthouses. Both bed & breakfasts and guesthouses saw a decrease in the number of rooms and bed-spaces available. Bed & breakfasts saw a decrease of 1% in rooms and 1% in bed-spaces while guesthouses saw a decrease of 5% in rooms and 4% in bed-spaces when compared with the previous year. Table 6 details the stock in December 2013 for guesthouses and bed & breakfasts in Northern Ireland.

Stock by District Council
Table 4 details all certified hotel, guesthouse and bed & breakfast stock combined, by district council area.

This shows that although Belfast only accounts for 7% of the premises in Northern Ireland, it accounts for the largest share of rooms and bed-spaces (31% and 29% respectively) which can be explained by the higher proportion of large hotels.

When combining the rooms and bed-spaces available in hotels, guesthouses and bed & breakfasts, Coleraine accounts for the second largest proportion (8% and 9% respectively) (Table 4).

Table 4: Northern Ireland certified hotel, guesthouse, bed & breakfast and guest accommodation stock by region, December 2013

District council	Premises (No.)	%	Room (No.)	%	Bed (No.)	%
Antrim	34	4%	598	5%	1,229	5%
Ards	35	4%	155	1%	340	1%
Armagh	19	2%	175	2%	481	2%
Ballymena	28	3%	288	3%	647	3%
Ballymoney	20	2%	58	1%	129	1%
Banbridge	12	1%	58	1%	121	0%
Belfast	58	7%	3,423	31%	7,093	29%
Carrickfergus	14	2%	188	2%	414	2%
Castlereagh	3	0%	270	2%	652	3%
Coleraine	96	11%	874	8%	2,264	9%
Cookstown	13	2%	126	1%	315	1%
Craigavon	14	2%	112	1%	236	1%
Derry	63	7%	814	7%	1,964	8%
Down	64	8%	591	5%	1,370	6%
Dungannon	20	2%	174	2%	397	2%
Fermanagh	73	9%	738	7%	1,749	7%
Larne	27	3%	202	2%	447	2%
Limavady	16	2%	208	2%	517	2%
Lisburn	33	4%	302	3%	636	3%
Magherafelt	10	1%	66	1%	166	1%
Moyle	75	9%	380	3%	907	4%
Newry and Mourne	47	6%	388	4%	899	4%
Newtownabbey	10	1%	160	1%	343	1%
North Down	23	3%	347	3%	713	3%
Omagh	25	3%	162	1%	388	2%
Strabane	15	2%	81	1%	192	1%
Total	**847**	**100%**	**10,938**	**100%**	**24,609**	**100%**

Note (1) Totals may not add to 100% due to rounding

Table 5 shows that Belfast district council accounts for just over one-fifth of all the hotels in Northern Ireland (21%). It also accounts for the largest share of hotel rooms (40%) and bed-spaces (37%). Fermanagh accounts for the second highest proportion with 8% of the total stock of Northern Ireland. This is closely followed by Derry who account for 7% of the stock which equates to 8% of hotel rooms and 9% of bed-spaces in Northern Ireland hotels.

Table 5 Northern Ireland certified hotel stock by region, December 2013

District council	Premises	%	Room	%	Bed	%
Antrim	8	6%	502	6%	1,020	6%
Ards	2	1%	50	1%	104	1%
Armagh	2	1%	120	2%	338	2%
Ballymena	5	4%	208	3%	468	3%
Ballymoney	1	1%	10	0%	20	0%
Banbridge	3	2%	35	0%	71	0%
Belfast	29	21%	3,187	40%	6,619	37%
Carrickfergus	4	3%	158	2%	342	2%
Castlereagh	3	2%	270	3%	652	4%
Coleraine	12	9%	419	5%	1,189	7%
Cookstown	4	3%	98	1%	247	1%
Craigavon	2	1%	49	1%	103	1%
Derry	10	7%	635	8%	1,544	9%
Down	6	4%	309	4%	739	4%
Dungannon	3	2%	107	1%	248	1%
Fermanagh	11	8%	384	5%	895	5%
Larne	4	3%	127	2%	275	2%
Limavady	2	1%	158	2%	408	2%
Lisburn	4	3%	189	2%	385	2%
Magherafelt	2	1%	33	0%	93	1%
Moyle	4	3%	121	2%	294	2%
Newry and Mourne	6	4%	229	3%	545	3%
Newtownabbey	2	1%	130	2%	276	2%
North Down	6	4%	261	3%	534	3%
Omagh	2	1%	80	1%	199	1%
Strabane	1	1%	24	0%	53	0%
Total	**138**	**100%**	**7,893**	**100%**	**17,661**	**100%**

Note (1) Totals may not add to 100% due to rounding

Coleraine district council accounted for the largest share of guesthouses, bed & breakfasts and guest accommodation in Northern Ireland (12%), which accounted for 15% of rooms and 15% of bed-spaces. Moyle accounted for 10% of the stock, which accounted for 9% of rooms and 9% of bed-spaces. Fermanagh accounted for 12% of the rooms and 12% of bed-spaces while accounting for 9% of the overall stock (Table 6).

Table 6 Northern Ireland certified guesthouse, bed & breakfast and guest accommodation stock by region, December 2013

District council	Premises	%	Room	%	Bed	%
Antrim	26	4%	96	3%	209	3%
Ards	33	5%	105	3%	236	3%
Armagh	17	2%	55	2%	143	2%
Ballymena	23	3%	80	3%	179	3%
Ballymoney	19	3%	48	2%	109	2%
Banbridge	9	1%	23	1%	50	1%
Belfast	29	4%	236	8%	474	7%
Carrickfergus	10	1%	30	1%	72	1%
Castlereagh	0	0%	0	0%	0	0%
Coleraine	84	12%	455	15%	1,075	15%
Cookstown	9	1%	28	1%	68	1%
Craigavon	12	2%	63	2%	133	2%
Derry	53	7%	179	6%	420	6%
Down	58	8%	282	9%	631	9%
Dungannon	17	2%	67	2%	149	2%
Fermanagh	62	9%	354	12%	854	12%
Larne	23	3%	75	2%	172	2%
Limavady	14	2%	50	2%	109	2%
Lisburn	29	4%	113	4%	251	4%
Magherafelt	8	1%	33	1%	73	1%
Moyle	71	10%	259	9%	613	9%
Newry and Mourne	41	6%	159	5%	354	5%
Newtownabbey	8	1%	30	1%	67	1%
North Down	17	2%	86	3%	179	3%
Omagh	23	3%	82	3%	189	3%
Strabane	14	2%	57	2%	139	2%
Total	**709**	**100%**	**3,045**	**100%**	**6,948**	**100%**

Note (1) Totals may not add to 100% due to rounding

The Occupancy Survey aims to collect data on all hotels and a sample of guesthouses and bed & breakfasts across Northern Ireland to produce accommodation statistics on the occupancy levels of these establishments. Unless otherwise detailed, from this point forward data is based on this sample. It should also be noted that unless otherwise detailed the occupancy rate for all GHBB includes Guest Accommodation.

Hotel Occupancy

During 2013, hotel room and bed-space occupancy rates were 64% and 44% respectively, showing a decrease in room occupancy of 1 percentage point and a decrease of 2 percentage points in bed-space occupancy when compared with 2012.

Hotel Size

During 2013, those hotels with 51–100 rooms size experienced an increase in both room occupancy and bed-space occupancy of 1 percentage point. Hotels with 26-50 rooms and those with 100+ rooms both saw a decrease in room occupancy (-3 percentage points and -1 percentage point respectively) and a decrease in bed-space occupancy (-1 percentage point and -3 percentage points respectively). Those hotels with less than 25 rooms showed no change (Table 7).

Table 7: Hotel room and bed-space occupancy rates by hotel size, 2011 to 2013

	2011		2012		2013		Change (2012-2013)[1]	
	Room (%)	Bed-space (%)	Room (%)	Bed-space (%)	Room (%)	Bed-space (%)	Room (pps)	Bed-space (pps)
All hotels	**59%**	**41%**	**65%**	**45%**	**64%**	**44%**	**-1**	**-2**
Less than 25	43%	29%	48%	33%	47%	33%	0	0
26-50	50%	31%	55%	30%	52%	29%	-3	-1
51-100	59%	39%	63%	42%	64%	43%	+1	+1
100+	64%	49%	73%	55%	72%	52%	-1	-3

Note (1) Change calculated using unrounded figures

Hotel Price

During 2013, both those hotels with a price band of £40-£49.99 and those priced £50-£59.99 saw an increase in both room occupancy and bed-space occupancy. The most expensive hotels (£60+) experienced a decrease of 2 percentage points in room occupancy and 3 percentage points in bed-space occupancy (Table 8).

Table 8: Hotel room and bed-space occupancy rates by price, 2011 to 2013

	2011		2012		2013		Change (2012-2013[1])	
	Room %	Bed-space (%)	Room (%)	Bed-space (%)	Room (%)	Bed-space (%)	Room (pps)	Bed-space (pps)
All hotels[3]	**59%**	**41%**	**65%**	**45%**	**64%**	**44%**	**-1**	**-2**
Less than £40[2]	*	*	*	*	*	*	*	*
£40-£49.99	48%	31%	51%	34%	59%	42%	+8	+7
£50-£59.99	59%	46%	59%	44%	64%	45%	+4	+1
£60+	60%	42%	68%	47%	65%	44%	-2	-3

Note (1) Change calculated using unrounded figures
*(2) * Sample size too small to provide a reliable estimate*
(3) All hotels includes those priced less than £40

Hotel Location

Table 9 shows that during January - December 2013, hotels in Belfast & Castlereagh experienced the highest rates in room and bed-space occupancy (73% and 51% respectively). Hotels in the Mid West experienced the lowest room and bed-space occupancy rates (48% and 33%).

Table 9: Hotel room and bed-space occupancy rates by Geographical region, January - December 2011 to 2013

	2011		2012		2013		Change (2012/2013)[1]	
Geographical Location	Room %	Bed %	Room %	Bed %	Room %	Bed %	Room (pps)	Bed (pps)
All Hotels	**59%**	**41%**	**65%**	**45%**	**64%**	**44%**	**-1**	**-2**
North West	63%	43%	63%	41%	68%	44%	+5	+2
Mid West	47%	32%	46%	30%	48%	33%	+2	+2
South West	55%	43%	65%	46%	55%	42%	-10	-4
North East	52%	34%	57%	38%	56%	36%	-1	-2
South East	51%	39%	53%	41%	56%	38%	+3	-3
Belfast and Castlereagh	65%	46%	75%	54%	73%	51%	-1	-3
Mid East	48%	33%	53%	33%	52%	35%	-1	+2

Note (1) Change calculated using unrounded figures
(Geographical regions are defined by Local Government Districts as provided:
North West – Derry, Limavady
Mid West – Cookstown, Magherafelt, Omagh, Strabane
South West – Dungannon, Fermanagh
North East – Ballymena, Ballymoney, Coleraine, Larne, Moyle
South East – Ards, Armagh, Banbridge, Craigavon, Down, Newry&Mourne
Belfast & Castlereagh –Belfast, Castlereagh
Mid East – Antrim, Carrickfergus, Lisburn, Newtownabbey, North Down)

Hotels in the North West experienced the largest increase in room occupancy of 5 percentage points while bed-space occupancy increased by 2 percentage points compared to the same period in 2012. Those hotels in the South East and the Mid West also saw increases in room occupancy of 3 percentage points and 2 percentage points respectively. The hotel room occupancy in the South West experienced the largest decrease in room occupancy of 10 percentage points.

Hotel Rooms and beds sold

During 2013, an estimated 1,828,000 hotel rooms were sold, representing a 1% increase on the number sold during 2012. The number of hotel bed-spaces sold during 2013 decreased by 1% when compared with the number sold during 2012 to 2,775,000 (Table 10).

Table 10: Hotel rooms and beds sold, 2011 to 2013 (Thousands)

2011		2012		2013		Change (2012-2013)[1]	
Room (000s)	Bed-space (000s)	Room (000s)	Bed-space (000s)	Room (000s)	Bed-space (000s)	Room (%)	Bed-space (%)
1,634	2,570	1,805	2,798	1,828	2,775	+1	-1

Note (1) Percentages calculated using unrounded figures

During 2013, 69% of hotel guests were from outside Northern Ireland. This was a decrease of 1 percentage point in the proportion of guests from Great Britain in 2013 (45%) compared to 2012 (47%). There was an increase of 1 percentage point in guests from Northern Ireland (31%) when compared with 2012 (29%) (Figure 1).

Figure 1: Guests to Northern Ireland Hotels 2011 to 2013 (%)

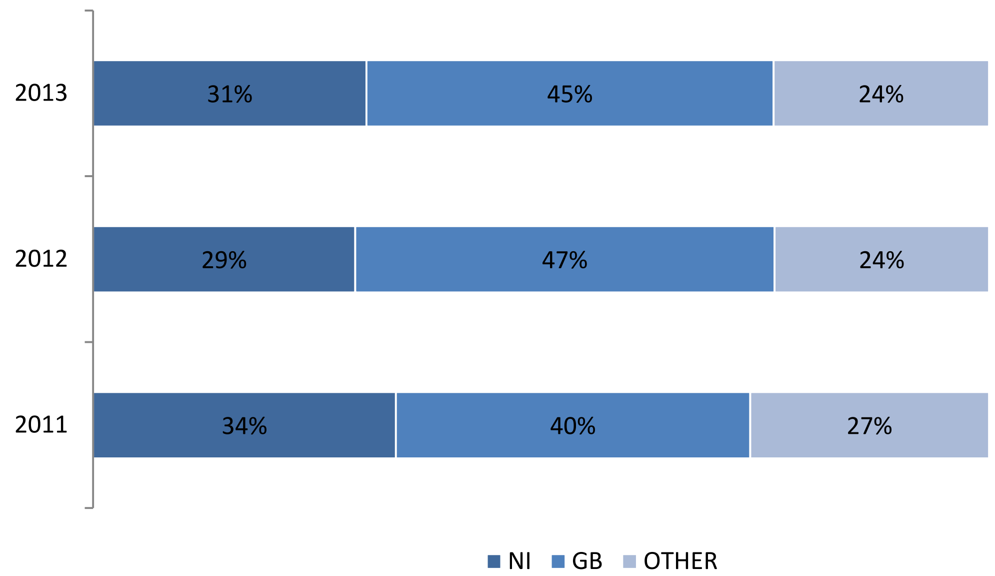


Table 11 Hotel Room and Bed-space occupancy Rates (%) Breakdown, 2011 to 2013

	2011		2012		2013		Change 2012-2013[1]	
	Room %	Bed %	Room %	Bed %	Room %	Bed %	Room (pps)	Bed (pps)
Hotels Overall[3]	**59%**	**41%**	**65%**	**45%**	**64%**	**44%**	**-1**	**-2**
Classification								
4/5 star	61%	43%	67%	47%	69%	46%	+2	-1
3 star	58%	38%	57%	37%	59%	40%	+2	+4
2 star	41%	28%	44%	32%	41%	30%	-2	-2
1 star[2]	*	*	*	*	*	*	*	*
Size								
<25 rooms	43%	29%	48%	33%	47%	33%	0	0
26-50 rooms	50%	31%	55%	30%	52%	29%	-3	-1
51-100 rooms	59%	39%	63%	42%	64%	43%	+1	+1
100+ rooms	64%	49%	73%	55%	72%	52%	-1	-3
Price								
<£40[2]	*	*	*	*	*	*	*	*
£40-£49.99	48%	31%	51%	34%	59%	42%	+8	+7
£50-£59.99	59%	46%	59%	44%	64%	45%	+4	+1
£60+	60%	42%	68%	47%	65%	44%	-2	-3

Note (1) Percentage change calculated using unrounded figures
*(2) * Sample size too small to provide a reliable estimate*
(3) All Hotels includes <40 and 1 star

Hotels- Classification

Average hotel room occupancy and bed-space occupancy in 2013 were highest in 4/5 star hotels, 69% and 46% respectively. Hotel occupancy rates were lowest in 2 star hotels which had average room occupancy of 41% and average bed-space occupancy of 30 % (Table 11).

Hotels – size

Hotels with 100+ rooms had the highest average room occupancy (72%) and bed-space occupancy (52%) during 2013. Those hotels with the lowest room occupancy had less than 25 rooms (47%), while hotels with 26-50 rooms had the lowest bed-space occupancy during 2013 (29%) (Table 11).

Hotel – Price
Average hotel room occupancy for 2013 was greatest in hotels priced £60+ (65%) and lowest in those priced £40-£49.99 (59%). Average bed-space occupancy for 2013 was greatest in hotels priced £50-£59.99 at 45% and lowest in hotels priced £40-£49.99 (42%) (Table 11).

Hotel Monthly Occupancy Rates
Room and bed-space occupancy rates vary from month to month. Hotel monthly room occupancy during 2013 was highest in August (82%) and lowest in January (44%). Hotel monthly bed-space occupancy was also highest during the month of August (59%) and lowest in January (28%) (See Table 12 for comparison with monthly occupancy rates in 2012).

Table 12: Monthly Hotel Occupancy 2011 to 2013

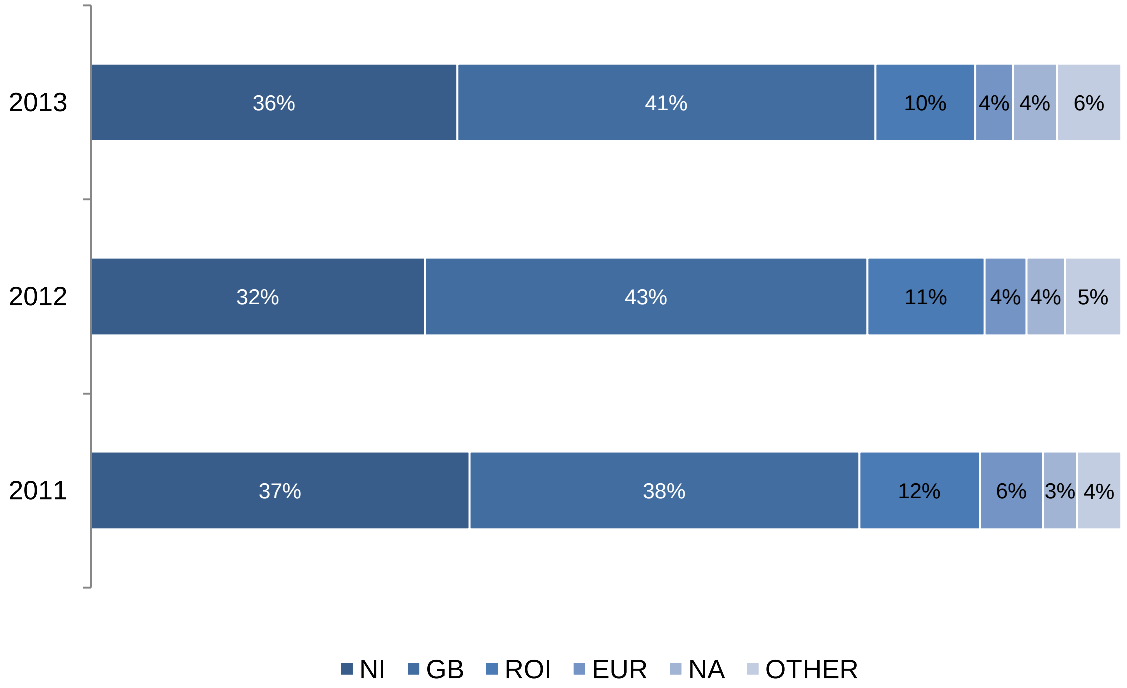
	2011		2012		2013		Change 2012 - 2013[1]	
	Room (%)	Bed (%)	Room (%)	Bed (%)	Room (%)	Bed (%)	Room (pps)	Bed (pps)
January	38	26	43	31	44	28	+1	-3
February	52	36	55	35	55	40	-1	+6
March	53	37	57	38	54	42	-4	+3
April	55	41	69	48	60	42	-9	-6
May	62	43	71	51	70	49	-2	-2
June	70	45	78	52	77	52	-1	0
July	66	46	76	58	74	48	-2	-10
August	73	56	82	61	82	59	+1	-2
September	68	47	76	52	75	45	-1	-6
October	61	42	65	44	68	46	+4	+2
November	54	38	59	40	61	38	+2	-2
December	47	34	49	35	50	35	+1	+1
Annual	**59**	**41**	**65**	**45**	**64**	**44**	**-1**	**-2**

Note (1) Change calculated using unrounded figures

Arrivals to Hotels

In 2013, the largest proportion of arrivals to Northern Ireland hotels came from Great Britain (41%) and from Northern Ireland residents (36%). Arrivals from the Republic of Ireland accounted for 10%, other European countries 4% and North America 4%. Figure 2 shows the arrivals to Northern Ireland hotels by country of residence for 2011-2013.

Figure 2: Arrivals to Northern Ireland Hotels 2011 to 2013 (%)



Average length of stay in Hotels

Average length of stay in hotels during 2013 was 1.8 nights. (See Table 13 for comparison with 2012 monthly average length of stay).

As can be seen in Table 13, there was very little change on a monthly basis in the average length of stay in hotels. The average number of nights stayed ranging from 1.6 nights in the month of December to 2.0 nights during the months of August and September.

The average length of stay for Northern Ireland residents in hotels during 2013 was 1.5 nights. While the average length of stay for non Northern Ireland residents during 2013 was 1.9 nights.

Table 13: Monthly hotel average length of stay (nights) 2011 to 2013

Month	**2011**	**2012**	**2013**
January	1.7	1.8	1.7
February	1.8	1.8	1.9
March	1.8	1.8	1.9
April	1.8	2.0	1.7
May	1.7	1.9	1.7
June	1.9	1.8	1.7
July	1.9	2.0	1.7
August	2.1	1.8	2.0
September	1.9	1.7	2.0
October	1.9	2.0	1.9
November	2.0	1.9	1.9
December	1.8	1.6	1.6
Annual	**1.9**	**1.9**	**1.8**

Guesthouse and Bed & Breakfast (GH&BB)

During 2013, GH&BB room occupancy rates were 31% a decrease of 1 percentage point when compared to 2012; bed-space occupancy was 22% showing a decrease of 2 percentage points on 2012.

Price

During 2013, all GH&BBs regardless of price saw a decrease in room occupancy and bed-space occupancy. Those GH&BBs with a price bracket of £20-£29.99 experienced the largest decreases in both room occupancy (5 percentage points) and bed-space occupancy (4 percentage points) (Table 14).

Table 14: Guesthouses and Bed & Breakfasts Room and bed-space occupancy rates by Room Prices, 2011 to 2013

	2011		2012		2013		Change (2012-2013)[1]	
	Room (%)	Bed-space (%)	Room (%)	Bed-space (%)	Room (%)	Bed-space (%)	Room (pps)	Bed-space (pps)
All Guesthouses and B&Bs[2]	**29%**	**21%**	**33%**	**23%**	**31%**	**22%**	**-1**	**-2**
Less than £20[2]	*	*	*	*	*	*	*	*
£20-£29.99	26%	19%	26%	18%	22%	14%	-5	-4
£30+	30%	21%	34%	25%	33%	24%	-1	-1

Note (1) Change calculated using unrounded figures

(2) All Guesthouses and B&BS includes those priced less than £20

Bed & Breakfasts, Guesthouses and Guest Accommodation – Location

Table 15 shows that during January - December 2013, Guesthouses and Bed & Breakfasts in the Mid East experienced the highest room occupancy of 35%, followed by the South West with 34%. The Mid West experienced the lowest room occupancy of 19%, but this was an increase of 1 percentage point on the same period in 2012.

The Mid East experienced an increase in room and bed-space occupancy of 4 and 3 percentage points respectively while the South East experienced an increase of 3 percentage points in room occupancy. The North East experienced the largest decrease in room occupancy of 2 percentage points while the South West experienced the largest decrease in bed-space occupancy (2 percentage points).

Table 15: Bed & Breakfasts and Guesthouse room and bed-space occupancy rates by Geographical region, January - December 2011 to 2013

	2011		2012		2013		Change (2012/2013)[1]	
Geographical Location	Room %	Bed %	Room %	Bed %	Room %	Bed %	Room (pps)	Bed (pps)
All GH's and B&B's[3]	**29%**	**21%**	**33%**	**23%**	**31%**	**22%**	**-1**	**-2**
North West	30%	20%	24%	17%	26%	20%	+1	+3
Mid West	14%	11%	18%	13%	19%	14%	+1	+1
South West	36%	26%	34%	23%	34%	21%	0	-2
North East	32%	24%	35%	24%	33%	23%	-2	-1
South East	22%	16%	24%	18%	27%	18%	+3	0
Belfast and Castlereagh[2]	*	*	*	*	*	*	*	*
Mid East	25%	17%	30%	21%	35%	24%	+4	+3

Note (1) Change calculated using unrounded figures
*(2) * Sample size too small to provide a reliable estimate*
(3) All GH's and B&Bs includes Belfast and Castlereagh
(Geographical regions are defined by Local Government Districts as provided:
North West – Derry, Limavady
Mid West – Cookstown, Magherafelt, Omagh, Strabane
South West – Dungannon, Fermanagh
North East – Ballymena, Ballymoney, Coleraine, Larne, Moyle
South East – Ards, Armagh, Banbridge, Craigavon, Down, Newry&Mourne
Belfast & Castlereagh –Belfast, Castlereagh
Mid East – Antrim, Carrickfergus, Lisburn, Newtownabbey, North Down)

Guesthouse and Bed & Breakfast Rooms and Beds sold

During 2013, an estimated 354,000 GHBB rooms were sold, a decrease of 4% on the number sold during 2012. Similarly, the number of GHBB bed-spaces sold during 2013 decreased by 7% to an estimated 568,000 when compared with the number sold during 2012 (Table 16).

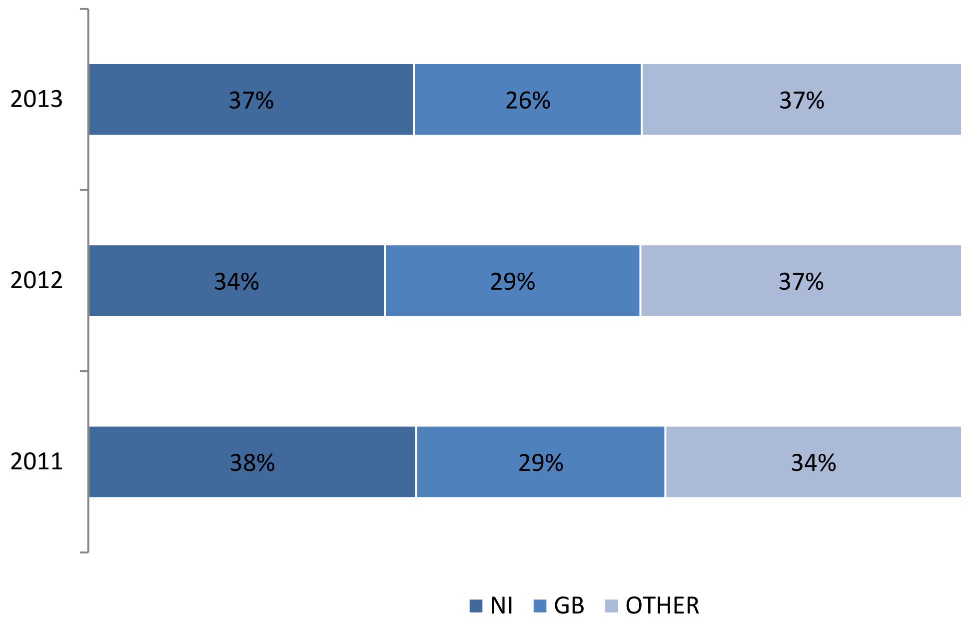
Table 16: Guesthouse and Bed & Breakfast Rooms and Beds Sold, 2011 to 2013 (Thousands)

2011		2012		2013		Change (2012-2013)[1]	
Room (000s)	Bed-space (000s)	Room (000s)	Bed-space (000s)	Room (000s)	Bed-space (000s)	Room (%)	Bed-space (%)
334	550	369	608	354	568	-4	-7

Note (1) Percentage change calculated using unrounded figures

As displayed in Figure 3, 63% of guests in Guesthouses and Bed and Breakfasts in 2013 were from outside Northern Ireland. This was a decrease of 3 percentage points on 2012. There was an increase of 3 percentage points in the proportion of guests from Northern Ireland in Guesthouses and Bed & Breakfasts between 2012 and 2013.

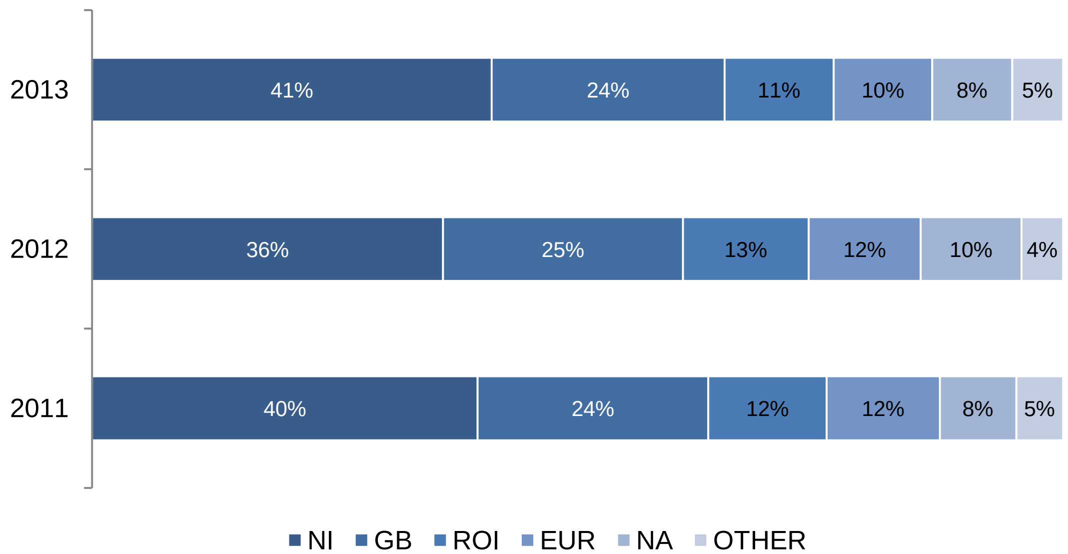
Figure 3: Guests to Northern Ireland GHBB 2011 to 2013 (%)



Arrivals to Guesthouses and Bed & Breakfasts

The largest group of arrivals to Northern Ireland Guest Houses and Bed and Breakfasts were from Northern Ireland residents (41%) this was followed by Great Britain (24%). Arrivals from the Republic of Ireland accounted for 11%, Other Europe 10% and North America 8%. Figure 4 shows the arrivals to Guest houses and Bed and Breakfasts in 2011, 2012 and 2013 by country of residence.

Figure 4: Arrivals to Northern Ireland GHBB 2011 to 2013 (%)



Guesthouses and Bed & Breakfasts
Average room occupancy in guesthouses decreased by 8 percentage points in 2013 to 36%. Average bed-space occupancy also saw a decrease of 7 percentage points to 26%.

Average room and bed-space occupancy in bed and breakfasts both decreased by 1 percentage point between 2012 and 2013 to 26% and 17% respectively.

Guesthouses and Bed & Breakfasts – Price
Average guesthouse and bed and breakfast room and bed-space occupancy for 2013 was greatest in establishments priced £30+ (33% and 24%) and lowest in establishments priced £20-£29.99 (22% and 14%) (Table 17).

Table 17: Room and Bed-space occupancy Rates (%) Breakdown, 2011 to 2013

	2011		2012		2013		Change (2012-2013)[1]	
	Room %	Bed %	Room %	Bed %	Room %	Bed %	Room (pps)	Bed (pps)
Guesthouses, B&Bs and Guest Accommodation Overall[3]	**29%**	**21%**	**33%**	**23%**	**31%**	**22%**	**-1**	**-2**
Guesthouses	31%	21%	44%	34%	36%	26%	-8	-7
Bed & Breakfasts	28%	21%	27%	19%	26%	17%	-1	-1
Guest Accommodation[2]	n/a	n/a	*	*	*	*	*	*
Price								
<£20[2]	*	*	*	*	*	*	*	*
£20-£29.99	26%	19%	26%	18%	22%	14%	-5	-4
£30+	30%	21%	34%	25%	33%	24%	-1	-1

Note (1) Change calculated using unrounded figures
*(2) * Sample size too small to provide a reliable estimate*
(3) All Guesthouses and B&Bs includes those priced less than £20

Monthly Occupancy Rates of Guesthouses and Bed &Breakfasts
Guesthouse and bed & breakfast occupancy during 2013 was highest in August (48%) and lowest in January (17%). Bed-space occupancy for guesthouses and bed & breakfasts was also highest in August (37%) and lowest in the months of January and December (11%) during 2013 (See Table 18 for comparison with 2012).

Table 18: Monthly GHBB[2] Occupancy 2011 to 2013 (%)

	2011		2012		2013		Change (2012 - 2013)[1]	
	Room (%)	Bed (%)	Room (%)	Bed (%)	Room (%)	Bed (%)	Room (pps)	Bed (pps)
January	15	10	14	9	17	11	+3	+2
February	21	15	18	12	23	16	+5	+4
March	20	13	24	16	23	15	-2	-2
April	30	23	29	19	27	19	-2	0
May	34	27	39	26	37	28	-2	+1
June	36	26	46	35	41	29	-5	-6
July	40	30	47	34	45	34	-2	0
August	49	37	52	41	48	37	-4	-4
September	37	28	42	31	37	26	-5	-5
October	30	21	32	24	29	20	-3	-4
November	19	13	25	18	25	14	0	-4
December	15	11	23	16	18	11	-6	-5
Annual	**29**	**21**	**33**	**23**	**31**	**22**	**-1**	**-2**

Note (1) Change calculated using unrounded figures
(2) Includes Guest Accommodation

Average Length of Stay in Guesthouses and Bed & Breakfasts
Average length of stay in guesthouses and Bed & Breakfasts showed no change from 2012 to 2013, remaining at 1.5 nights.

The average length of stay for Northern Ireland residents in guesthouses/bed & breakfasts during 2013 was 1.4 nights showing no change when compared to 2012. The average length of stay for Non Northern Ireland residents in guesthouses/bed & breakfasts also remained the same at 1.6 nights.

Similar to hotels there was very little difference on a monthly basis in the average length of stay in guesthouses and bed & breakfasts, ranging from 1.4 nights in the months of March, August, September, October and November to 1.9 nights during the month of January (See Table 19 for comparison with 2012 monthly average length of stay).

Table 19: Monthly Guesthouse/Bed & Breakfast average length of stay (nights) 2011 to 2013

Month	2011	2012	2013
January	1.5	1.6	1.9
February	1.7	1.7	1.8
March	1.6	1.4	1.4
April	1.5	1.3	1.5
May	1.6	1.6	1.6
June	1.3	1.5	1.5
July	1.3	1.7	1.6
August	1.3	1.5	1.4
September	1.5	1.6	1.4
October	1.9	1.6	1.4
November	1.5	1.5	1.4
December	1.8	1.5	1.6
Annual	**1.5**	**1.5**	**1.5**

Occupancy Survey - Methodology

Hotels/Guesthouses/Bed&Breakfasts

Sample

To offer tourist accommodation in NI, you must have a certificate from the Northern Ireland Tourist Board (NITB) - NITB refers to this as certification. It is illegal to offer tourist accommodation in NI without a certificate from NITB. The list of certified accommodation in NITB is known as the 'stock'. At the beginning of the year, a sample of the guesthouses and bed & breakfasts in NI was drawn from the stock, particularly including good responders from the previous year to ensure year on year comparison.

The process of selecting respondents can have the potential to introduce bias but the inclusion of weighting processes are designed to counteract any such bias. In 2013, Tourism Statistics Branch has started to select respondents on a random sample basis. We will, however, need to build up a time series on this new basis to enable comparison to be made on a like for like basis before publishing any of this data. Monitoring of the comparison of the old and new systems shows no bias at this point in time and we will, of course, continue to monitor.

The sample is drawn at different rates according to district council as the number of establishments in these smaller geographical areas differs. For example in Belfast there were 28 establishments in total, but 71 in Moyle and each of these establishments differs in size/price/star rating so to ensure valid data for each area, a different sample would be required. (This is known as disproportionate stratified sample).

Each month, all Hotels and the sample of Guesthouses, Bed & Breakfasts and Guest Accommodation are invited to participate in the occupancy survey by completing a questionnaire.

The information in this bulletin is presented in terms of room and bed-space occupancy, and rooms and bed-spaces sold. The room and bed-space occupancy can be influenced by an establishment adding new rooms or bed-spaces which have not been certified or closing rooms for refurbishment throughout the year and can change monthly. Occupancy rates can also be influenced by seasonality.

Full information on visitors to Northern Ireland during 2013 can be found at
Northern Ireland Annual Tourism Statistics 2013 publication

Questionnaire

Establishments are asked to record the following in the questionnaire:

- The total number of rooms let out each night,
- The total number of guests staying in the establishment each night,
- The total number of guests checking in as new arrivals each day,
- The daily number of new arrivals by area of residency (Northern Ireland, Republic of Ireland, Great Britain, Europe, North America and other countries),
- The daily number of guests by area of residency (Northern Ireland, Great Britain and other countries).

Weighting

The data has been weighted for non-response assuming no non-response bias and also weighted by local authority and size. Due to different response rates to different parts of the survey, there are different weights for arrivals, guests and weekend/weekday splits (some accommodation providers do not provide information on the country of residence of their arrivals/guests and others provide monthly data as opposed to daily data).

Terminology

The main measures are bed-space occupancy and room occupancy.

Bed-space occupancy rates
refer to the proportion of all bed-spaces available at any given time that are occupied by paying guests. In calculating these figures, the total number of bed-spaces available is allowed to vary over the months to take account of any changes in the number of beds offered by individual establishments through the use of extra beds or withdrawal of some rooms from use.
(Total number of bed-spaces occupied / total number of bed-spaces available) *100

Room occupancy rates
refer to the proportion of rooms available at any given time that are occupied by at least one paying guest. These rates differ from bed-space occupancy rates in that the room may be occupied whilst all the bed-spaces in the room are not.
(Total number of rooms occupied / Total number of rooms available) *100

Weekend/Weekday
Weekends are defined as Friday, Saturday and Sunday, with Monday to Thursday being defined as weekdays.

Rooms and Bed-spaces sold
Rooms Sold
applies the calculated room occupancy rate to the number of rooms available from the Northern Ireland Tourist Board stock. This does not take into account any known differences between the stock file and the actual number of rooms available as there may be a delay in updating the stock file to enable the process of re-certification.
Bed-spaces Sold
applies the calculated bed-space occupancy rate to the number of beds available from the Northern Ireland Tourist Board stock. This does not take into account any known differences between the stock file and the actual number of bed-spaces available as there may be a delay in updating the stock file to enable the process of re-certification.

Data Revisions

The information here-in may be subject to revision due to improvements to the survey/analysis methodology or the inclusion of data returned after the publication date. The figures presented in this bulletin are the most up-to-date available at the time of publication. Full information on the revision of tourism statistics can be found at Tourism Statistics Branch Revisions Policy

Further Information

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http://www.detini.gov.uk/deti-stats-index/tourism-statistics/stats-accomm-6.htm

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