Tourism **Statistics Bulletin**

NORTHERN IRELAND HOTEL, BED & BREAKFAST AND GUESTHOUSE OCCUPANCY SURVEY

(JANUARY-DECEMBER 2012)

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This report provides the analysis of the most recent (January-December 2012) annual information from the Occupancy Survey for Hotels, Bed & Breakfasts and Guesthouses in Northern Ireland. The figures show:

- Average room occupancy in hotels during 2012 was 65%, an increase of 7 percentage points from 2011. Bed-space occupancy experienced an increase of 4 percentage points to 45%.
- Average room occupancy for Guesthouses and Bed & Breakfasts in the same period was 33% showing an increase of 4 percentage points on 2011 while bed-space occupancy increased 2 percentage points to 23%.
- Average hotel occupancy rates were highest for 4/5 star hotels who experienced room occupancy of 67% and bed-space occupancy of 47%.

Northern Ireland Statistics & Research agency

Contents

Executive summary

Occupancy Rates
Average hotel room occupancy in Northern Ireland for 2012 was 65%, an increase of 7 percentage points from 2011. Bed-space occupancy experienced an increase of 4 percentage points to 45%.

Average room occupancy for Guesthouses and Bed & Breakfasts in the same period was 33% showing an increase of 4 percentage points on 2011 while bed-space occupancy increased 2 percentage points to 23%.

Hotels with 100+ rooms experienced the highest occupancy rates of all hotels in Northern Ireland in 2012 (73% room occupancy and 55% bed-space occupancy).

Rooms and Beds Sold
An estimated 1,805,000 hotel rooms and 2,798,000 bed-spaces were sold across Northern Ireland during 2012. This showed an increase of 11% in rooms sold and an increase of 9% in the number of bed-spaces sold compared with 2011.

At the same time, the number of rooms sold in guesthouses and bed & breakfasts increased by 10% to 369,000 while there was an 11% increase in the number of bed-spaces sold to 608,000.

Average Length of Stay
The average length of stay for hotels guesthouses and bed & breakfasts showed no change between 2011 and 2012 with average length of stay in hotels of 1.9 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 2012 (43%) while Northern Ireland residents accounted for the highest proportion arrivals to guesthouses and bed & breakfasts (36%).

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 7,708 hotel rooms and 17,176 hotel bed-spaces available at end December 2012. This represents an increase of 2% in the number of hotels and an increase of 2% in the number of rooms and bed-spaces available, when compared with the hotel stock at end December 2011. At end December 2012, there were 1,424 self-catering establishments, showing an increase of 5% when compared with the same period in 2011. There was a 6% increase in the number of units within these establishments to 2,254 in December 2012.

Table 1: Northern Ireland Stock, 2011-2012

	2011			2012		
	Number	Room	Bed	Number	Room	Bed
Hotel	135	7,563	16,765	138	7,708	17,176
Bed & Breakfast	612	2,179	4,972	583	1,944	4,438
Guesthouse	117	948	2,153	112	882	2,010
Guest Accommodation	7	150	340	12	187	427
	Number	Units		Number	Units	
Self-Catering	1,353	2,134		1,424	2,254	
	Number	Room	Bed	Number	Room	Bed
Hostel	47	515	2,649	47	518	2,401
Bunkhouse	3	12	54	3	12	42
Campus	10	4,799	4,981	13	4,625	4,842

Hotel Stock

The largest share of available rooms in hotels was in the four/five star classification (37%), while the smallest share of rooms was in the one star classification (less than 1%). Hotels were reclassified in September 2011 therefore this report is based on the new classifications (see table 2).

Table 2: Northern Ireland Hotel stock by classification, December 2012

Classification	Number	%	Room	%	Bed	%
4/5*	33	24	2,838	37	6,117	36
3*	48	35	2,035	26	4,832	28
2*	8	6	199	3	434	3
1*	1	1	16	0	33	0
Unclassified/ Awaiting Classification	48	35	2,620	34	5,760	34
Total	**138**	**100**	**7,708**	**100**	**17,176**	**100**

Guesthouse and Bed & Breakfast stock
At end December 2012, there were a total of 694 guesthouses and bed & breakfasts (GHBB), with a total of 2,826 rooms and 6,448 bed-spaces (Table 3). This represents a decrease of 5% in the number of GHBBs, and a decrease of 10% in both the number of rooms and the number of bed-spaces available, when compared with the GHBB stock at December 2011.

Table 3: Northern Ireland Guesthouse and Bed & Breakfast stock, December 2012

Classification	Number	%	Room	%	Bed	%
Guesthouse	112	16	882	31	2,010	31
Bed & Breakfast	582	84	1,944	69	4,438	69
Total	**694**	**100**	**2,826**	**100**	**6,448**	**100**

There was a 5% decrease over the year in the stock for bed & breakfast establishments and a 4% 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 11% in both beds and rooms while Guesthouses saw a decrease of 7% in both when compared with the previous year. Table 6 details the stock in December 2012 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 28% 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 (9% and 10% respectively).(See table 4)

Table 4: Northern Ireland certified hotel, guesthouse and bed & breakfast stock by region, December 2012

District council	Premises (No.)	%	Room (No.)	%	Bed-spaces (No.)	%
Antrim	32	4	574	5	1180	5
Ards	38	5	154	1	333	1
Armagh	17	2	169	2	460	2
Ballymena	28	3	289	3	628	3
Ballymoney	21	3	59	1	128	1
Banbridge	12	1	61	1	126	1
Belfast	57	7	3,237	31	6,712	28
Carrickfergus	14	2	188	2	414	2
Castlereagh	3	0	270	3	622	3
Coleraine	101	12	899	9	2,327	10
Cookstown	14	2	130	1	326	1
Craigavon	14	2	107	1	224	1
Derry	46	6	757	7	1810	8
Down	56	7	529	5	1,240	5
Dungannon	19	2	169	2	387	2
Fermanagh	72	9	657	6	1,566	7
Larne	27	3	207	2	456	2
Limavady	18	2	217	2	535	2
Lisburn	31	4	291	3	614	3
Magherafelt	11	1	77	1	188	1
Moyle	79	9	356	3	828	4
Newry and Mourne	43	5	358	3	820	3
Newtownabbey	11	1	162	2	347	1
North Down	25	3	352	3	726	3
Omagh	26	3	166	2	395	2
Strabane	17	2	99	1	232	1
Total	**832**	**100**	**10,534**	**100**	**23,624**	**100**

Table 5 shows that Belfast district council accounts for one-fifth of all the hotels in Northern Ireland (20%). It also accounts for the largest share of hotel rooms (39%) and bed-spaces (37%). Derry accounts for the second highest proportion with 7% of the total stock of Northern Ireland hotels accounting for 8% of rooms and 9% of bed-spaces. This is closely followed by Coleraine who account for 6% of hotel rooms and 7% of bed-spaces in Northern Ireland hotels.

Table 5 Northern Ireland certified hotel stock by region, December 2012

District council	Premises (No.)	%	Rooms (No.)	%	Bed-spaces (No.)	%
Antrim	8	6	481	6	978	6
Ards	2	1	50	1	104	1
Armagh	2	1	120	2	333	2
Ballymena	5	4	211	3	454	3
Ballymoney	1	1	10	0	20	0
Banbridge	3	2	35	0	71	0
Belfast	28	20	3,036	39	6,319	37
Carrickfergus	4	3	158	2	342	2
Castlereagh	3	2	270	4	622	4
Coleraine	13	9	435	6	1,226	7
Cookstown	4	3	98	1	247	1
Craigavon	2	1	49	1	103	1
Derry	10	7	619	8	1,474	9
Down	6	4	309	4	734	4
Dungannon	3	2	107	1	248	1
Fermanagh	11	8	382	5	890	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	3	2	90	1	206	1
Newry and Mourne	6	4	231	3	549	3
Newtownabbey	2	1	130	2	276	2
North Down	6	4	261	3	534	3
Omagh	2	1	80	1	199	1
Strabane	2	1	39	1	86	1
Total	**138**	**100**	**7,708**	**100**	**17,176**	**100**

Coleraine district council accounted for the largest share of guesthouse and bed & breakfasts in Northern Ireland (13%), which accounted for 16% of rooms and 17% of bed-spaces. Moyle accounted for 11% of the stock, which accounted for 9% of rooms and 10% of bed-spaces. Fermanagh accounted for 10% of the rooms and 10% of bed-spaces while accounting for 9% of the overall stock (see table 6).

Table 6 Northern Ireland certified guesthouse and bed & breakfast stock by region, December 2012

District council	Premises (No.)	%	Rooms (No.)	%	Bed-spaces (No.)	%
Antrim	24	3	93	3	202	3
Ards	36	5	104	4	229	4
Armagh	15	2	49	2	127	2
Ballymena	23	3	78	3	174	3
Ballymoney	20	3	49	2	108	2
Banbridge	9	1	26	1	55	1
Belfast	29	4	201	7	393	6
Carrickfergus	10	1	30	1	72	1
Castlereagh	0	0	0	0	0	0
Coleraine	88	13	464	16	1,101	17
Cookstown	10	1	32	1	79	1
Craigavon	12	2	58	2	121	2
Derry	36	5	138	5	336	5
Down	50	7	220	8	506	8
Dungannon	16	2	62	2	139	2
Fermanagh	61	9	275	10	676	10
Larne	23	3	80	3	181	3
Limavady	16	2	59	2	127	2
Lisburn	27	4	102	4	229	4
Magherafelt	9	1	44	2	95	1
Moyle	76	11	266	9	622	10
Newry and Mourne	37	5	127	4	271	4
Newtownabbey	9	1	32	1	71	1
North Down	19	3	91	3	192	3
Omagh	24	3	86	3	196	3
Strabane	15	2	60	2	146	2
Total	**694**	**100**	**2,826**	**100**	**6,448**	**100**

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.

Hotel Occupancy

During 2012, hotel room and bed-space occupancy rates were 65% and 45% respectively, showing an increase in room occupancy of 7 percentage points and an increase of 4 percentage points in bed-space occupancy when compared with 2011.

Hotel Size

During 2012, all hotels irrespective of size experienced an increase in room occupancy. Hotels with 100+ rooms saw the highest increase (9 percentage points when compared to the same period in 2011). All hotels with the exception of those with 26-50 rooms also experienced an increase in bed-space occupancy. (Table 7)

Table 7: Hotel room and bed-space occupancy rates by hotel size, 2011 and 2012

	2011		2012		Change (2011-2012)[1]	
	Room (%)	Bed-space (%)	Room (%)	Bed-space (%)	Room (pps)	Bed-space (pps)
All hotels	**59**	**41**	**65**	**45**	**+7**	**+4**
Less than 25	43	29	48	33	+5	+4
26-50	50	31	55	30	+5	-2
51-100	59	39	63	42	+4	+3
100+	64	49	73	55	+9	+7

Note (1) Percentage change calculated using unrounded figures

Hotel Price

During 2012, both those hotels with a price band of £40-£49.99 and those priced £60+ saw an increase in both room occupancy and bed-space occupancy. The most expensive hotels (£60+) saw the largest increases of 7 percentage points and 5 percentage points respectively. Those hotels priced £50-£59.99 experienced a decrease of 2 percentage points in bed-space occupancy while their room occupancy rate remained static when compared to 2011. (Table 8)

Table 8: Hotel room and bed-space occupancy rates by price, 2011 and 2012

	2011		2012		Change (2011-2012)[1]	
	Room (%)	Bed-space (%)	Room (%)	Bed-space (%)	Room (pps)	Bed-space (pps)
All hotels	**59**	**41**	**65**	**45**	**+7**	**+4**
Less than £40[2]	*	*	*	*	*	*
£40-£49.99	48	31	51	34	+4	+3
£50-£59.99	59	46	59	44	+0	-2
£60+	60	42	68	47	+7	+5

Note (1) Percentage change calculated using unrounded figures
*(2) * Sample size too small to provide a reliable estimate*

Hotel Location
Table 9 shows that during January - December 2012, hotels in Belfast & Castlereagh experienced the highest rates in room and bed-space occupancy (75% and 54% respectively). Hotels in the Mid West experienced the lowest room and bed-space occupancy rates (46% and 30%).

The hotel room occupancy in Mid West showed a decrease of 1 percentage point. Hotels in the South West experienced an increase of 10 percentage points in room occupancy. Hotels in Belfast & Castlereagh experienced an increase of 9 percentage points in room occupancy and 8 percentage points in bed-space occupancy when compared to the same period in 2011, where the North West and the Mid West each experienced a decrease of 2 percentage points in bed-space occupancy.

Table 9: Hotel room and bed-space occupancy rates by Geographical region, January - December 2011/2012

	2011		2012		Change[1] 2011/2012	
Geographical Location	Room %	Bed-Space %	Room %	Bed-Space %	Room (pps)	Bed-Space (pps)
All Hotels	**59%**	**41%**	**65%**	**45%**	**7**	**4**
North West	63%	43%	63%	41%	+1	-2
Mid West	47%	32%	46%	30%	-1	-2
South West	55%	43%	65%	46%	+10	+3
North East	52%	34%	57%	38%	+5	+3
South East	51%	39%	53%	41%	+2	+2
Belfast and Castlereagh	65%	46%	75%	54%	+9	+8
Mid East	49%	33%	53%	33%	+4	0

Note (1) Percentage change calculated using unrounded figures

Hotel Rooms and beds sold

During 2012, an estimated 1,805,000 hotel rooms were sold, representing an 11% increase on the number sold during 2011. The number of hotel bed-spaces sold during 2012 increased by 9% when compared with the number sold during 2011 to 2,798,000. (Table 10)

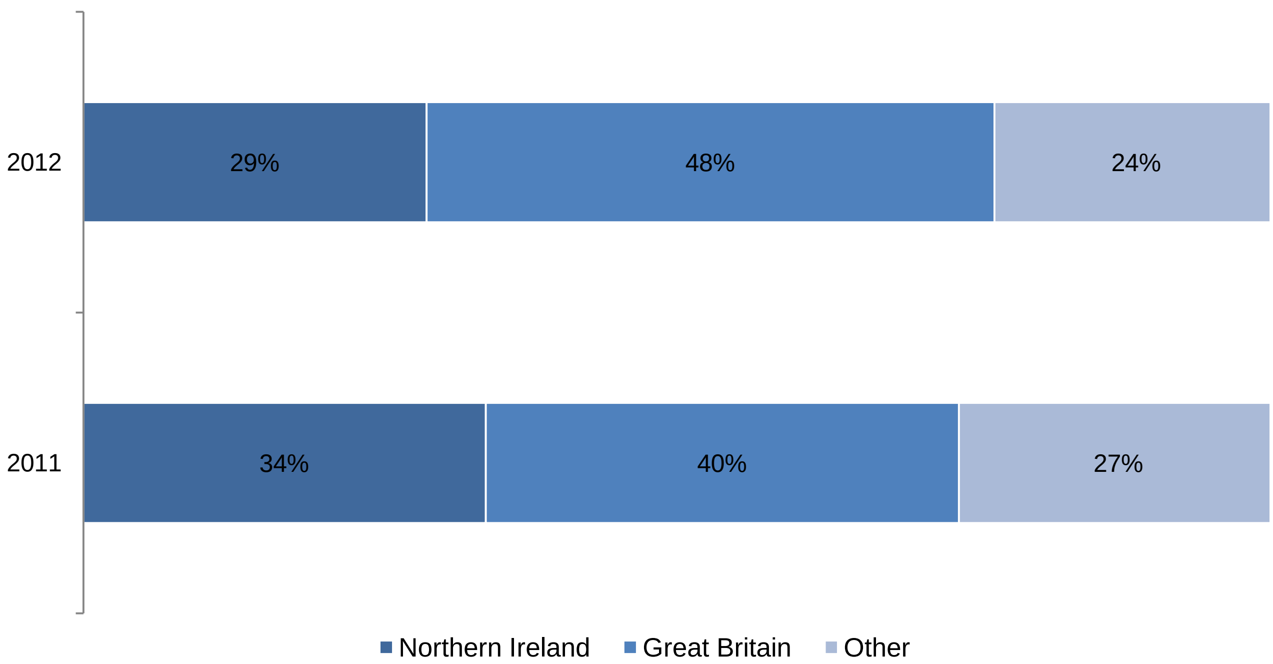
Table 10: Hotel rooms and beds sold, 2011 and 2012 (Thousands)

2011		2012		Change (2011-2012)[1]	
Room (000s)	Bed-space (000s)	Room (000s)	Bed-space (000s)	Room (%)	Bed-space (%)
1,634	2,570	1,805	2,798	11%	9%

Note (1) Percentages calculated using unrounded figures

During 2012, 72% of hotel guests were from outside Northern Ireland. This was an increase of 8 percentage points in the proportion of guests from Great Britain in 2012 (48%) compared to 2011 (40%). There was a decrease of 5 percentage points in guests from Northern Ireland (29%) when compared with 2011 (34%) (See Figure 1)

Figure 1: Guests to Northern Ireland Hotels 2011-2012[1]



Note (1) Percentages calculated using unrounded figures

Table 11 Hotel Room and Bed-space occupancy Rates (%) Breakdown, 2011-2012

	2011		2012		Change (2011-2012)[1]	
	Room %	Bed-Space %	Room %	Bed-Space %	Room (pps)	Bed-Space (pps)
All Hotels	**59**	**41**	**65**	**45**	**+7**	**+4**
Classification						
4/5 star	61	43	67	47	+6	+4
3 star	58	38	57	37	-1	-2
2 star	41	28	44	32	+2	+4
1 star[2]	*	*	*	*	*	*
Size						
<25 rooms	43	29	48	33	+5	+4
26-50 rooms	50	31	55	30	+5	-2
51-100 rooms	59	39	63	42	+4	+3
100+ rooms	64	49	73	55	+9	+7
Price						
<£40[2]	*	*	*	*	*	*
£40-£49.99	48	31	51	34	+4	+3
£50-£59.99	59	46	59	44	0	-2
£60+	60	42	68	47	+7	+5

Note (1) Percentage change calculated using unrounded figures
*(2) * Sample size too small to provide a reliable estimate*

Hotels- Classification
Average hotel room occupancy and bed-space occupancy in 2012 were highest in 4/5 star hotels, 67% and 47% respectively. Hotel occupancy rates were lowest in 2 star hotels which had average room occupancy of 44% and average bed-space occupancy of 32%. (Table 11)

Hotels – size
Hotels with 100+ rooms had the highest average room occupancy (73%) and bed-space occupancy (55%) during 2012. Those hotels with the lowest room occupancy had less than 25 rooms (48%), while hotels with 26-50 rooms had the lowest bed-space occupancy during 2012 (30%).
(Table 11)

Hotel – Price
Average hotel room occupancy for 2012 was greatest in hotels priced £60+ (68%) and lowest in those priced £40-£49.99 (51%). Similarly average bed-space occupancy for

2012 was greatest in hotels priced £60+ at 47% and lowest in hotels priced £40-£49.99 (34%) (Table 11).

Hotel Monthly Occupancy Rates

Room and bed-space occupancy rates vary from month to month. Hotel monthly room occupancy during 2012 was highest in August (82%) and lowest in January (43%). Hotel monthly bed-space occupancy was also highest during the month of August (61%) and lowest in January (31%). (See Table 12 for comparison with monthly occupancy rates in 2011).

Table 12: Monthly Hotel Occupancy

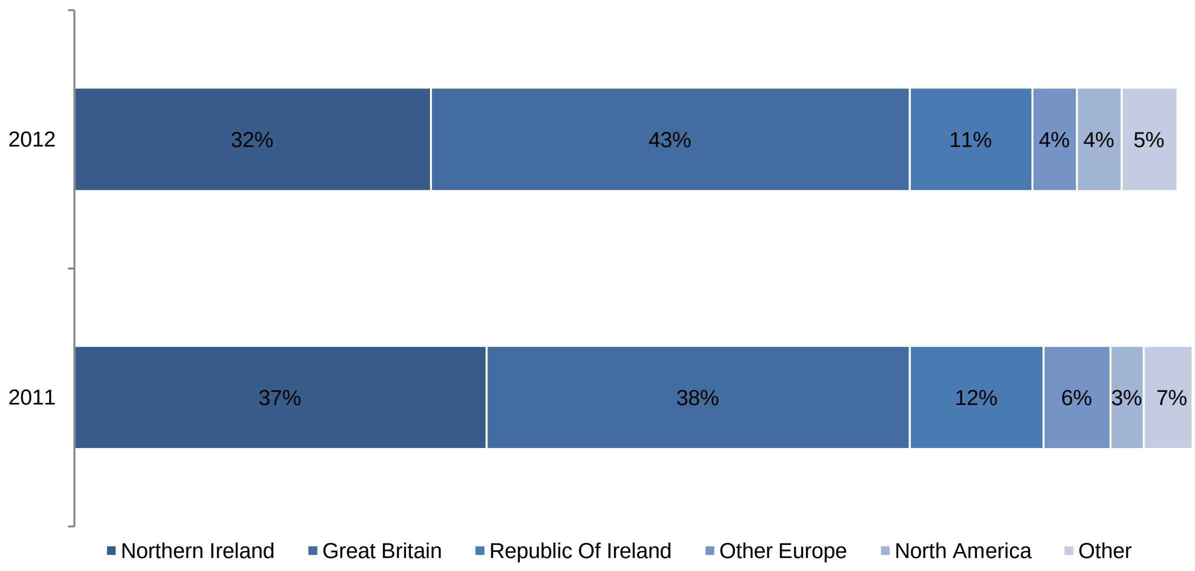
	2011		2012		Change (2011 -2012)[1]	
	Room (%)	Bed-Space (%)	Room (%)	Bed-Space (%)	Room (pps)	Bed-Space (pps)
January	38	26	43	31	+5	+5
February	52	36	55	36	+3	-1
March	53	37	57	38	+4	+2
April	55	41	69	48	+14	+7
May	62	43	71	51	+9	+8
June	70	45	78	52	+8	+7
July	66	46	76	58	+10	+12
August	73	56	82	61	+8	+5
September	68	47	76	52	+8	+4
October	61	42	65	44	+4	+2
November	54	38	59	40	+5	+2
December	47	34	49	35	+3	0
Annual	**59**	**41**	**65**	**45**	**+7**	**+4**

Note (1) Percentage change calculated using unrounded figures

Arrivals to Hotels

In 2012, the largest proportion of arrivals to Northern Ireland hotels came from Great Britain (43%) and from Northern Ireland residents (32%). Arrivals from the Republic of Ireland accounted for 11%, other European countries 4% and North America 4%. Figure 2 shows the arrivals to Northern Ireland hotels by country of residence for 2011-2012.

Figure 2: Arrivals to Northern Ireland Hotels 2011-2012



Note (1) Percentages calculated using unrounded figures

Average length of stay in Hotels
Average length of stay in hotels during 2012 was 1.9 nights. (See Table 13 for comparison with 2011 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 during the months of April, July and October.

The average length of stay for Northern Ireland residents in hotels during 2012 was 1.7 nights. While the average length of stay for non Northern Ireland residents during 2012 was 2.0 nights. All figures showed no change from 2011.

Table 13: Monthly hotel average length of stay (nights) 2011-2012

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

Guesthouse and Bed & Breakfast (GH&BB)

During 2012, GH&BB room occupancy rates were 33% an increase of 4 percentage points when compared to 2011, bed-space occupancy was 23% showing an increase of 2 percentage points on 2011.

Price

During 2012, the most expensive GH&BBs priced £30 or more saw an increase of 4 percentage points in room occupancy and an increase of 3 percentage points in bed-space occupancy. Those GH&BBs with a price bracket of £20-£29.99 saw a slight increase in room occupancy (1 percentage point) and a decrease in bed-space occupancy of 2 percentage points. (Table 14)

Table 14: Guesthouses and Bed & Breakfasts Room and bed-space occupancy rates by Room Prices, 2011 and 2012

	2011		2012		Change (2011-2012)[1]	
	Room (%)	Bed-space (%)	Room (%)	Bed-space (%)	Room (pps)	Bed-space (pps)
All Guesthouses and B&Bs	29	21	33	23	+4	+2
Less than £20[2]	*	*	*	*	*	*
£20-£29.99	26	19	26	18	+1	-2
£30+	30	21	34	25	+4	+3

Note (1) Percentage change calculated using unrounded figures

Bed & Breakfasts, Guesthouses and Guest Accommodation – Location

Table 15 shows that during January - December 2012, Guesthouses and Bed & Breakfasts in the North East experienced the highest room occupancy of 35%, followed by the South West with 34%. The Mid West experienced the lowest room occupancy of 20%, but this was an increase of 6 percentage points on the same period in 2011.

The Mid East experienced an increase in room and bed-space occupancy of +5 and +4 percentage points respectively and the Mid West experienced increases of +6 and +4 percentage points respectively. The North West experienced the largest decreases of -5 percentage points in room occupancy and -2 percentage points in bed-space occupancy.

Table 15: Bed & Breakfasts and Guesthouse room and bed-space occupancy rates by Geographical region, January - December 2011/2012

Geographical Location	2011 Room %	2011 Bed-Space %	2012 Room %	2012 Bed-Space %	Change[1] 2011/2012 Room %	Change[1] 2011/2012 Bed-Space %
All GH's and B&B's	**29%**	**21%**	**33%**	**23%**	**+4**	**+2**
North West	30%	20%	25%	17%	-5	-2
Mid West	14%	11%	20%	15%	+6	+4
South West	36%	26%	34%	23%	-2	-3
North East	32%	24%	35%	24%	+2	+0
South East	22%	16%	24%	18%	+2	+2
Belfast and Castlereagh[2]	*	*	*	*	*	*
Mid East	25%	17%	30%	22%	+5	+4

Note (1) Percentage change calculated using unrounded figures
*(2) * Sample size too small to provide a reliable estimate*

Guesthouse and Bed & Breakfast Rooms and Beds sold

During 2012, an estimated 369,000 GHBB rooms were sold, an increase of 10% on the number sold during 2011. Similarly, the number of GHBB bed-spaces sold during 2012 increased by 11% to an estimated 608,000 when compared with the number sold during 2011. (Table 16)

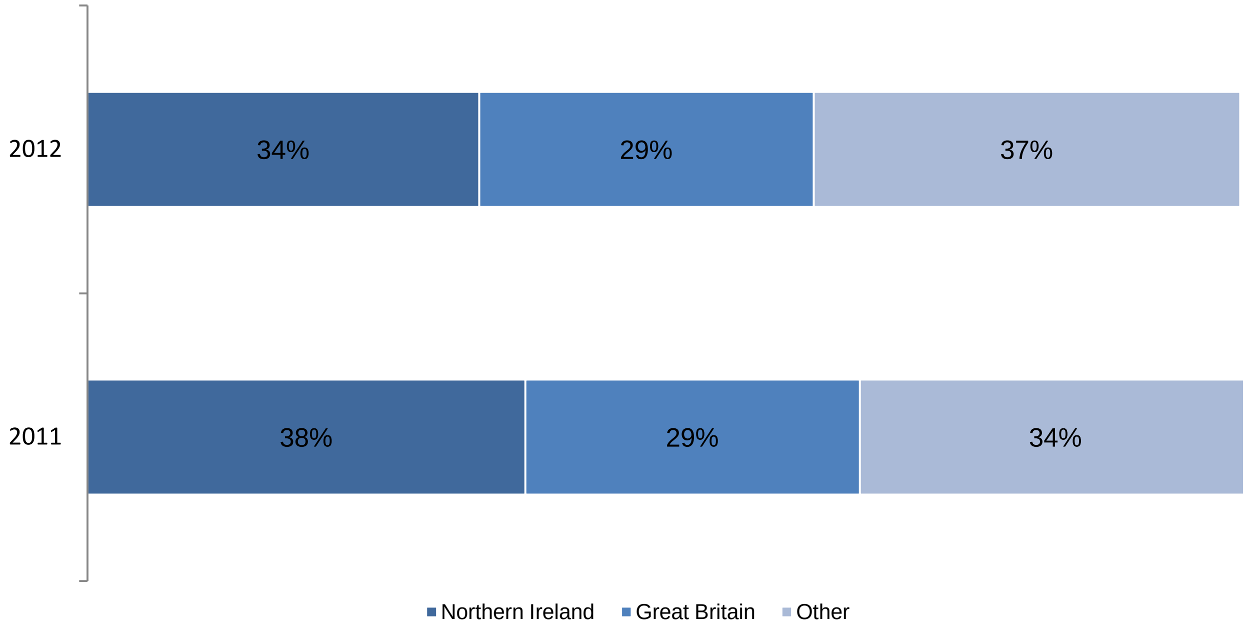
Table 16: Guesthouse and Bed & Breakfast Rooms and Beds Sold, 2011 and 2012 (Thousands)

2011 Room (000s)	2011 Bed-space (000s)	2012 Room (000s)	2012 Bed-space (000s)	Change (2011-2012)[1] Room (%)	Change (2011-2012)[1] Bed-space (%)
334	550	369	608	10	11

Note (1) Percentage change calculated using unrounded figures

As displayed in Figure 3, 66% of guests in Guesthouses and Bed and Breakfasts in 2012 were from outside Northern Ireland. This was an increase of 3 percentage points on 2011. There was a decrease of 4 percentage points in the proportion of guests from Northern Ireland in Guesthouses and Bed & Breakfasts between 2011 and 2012.

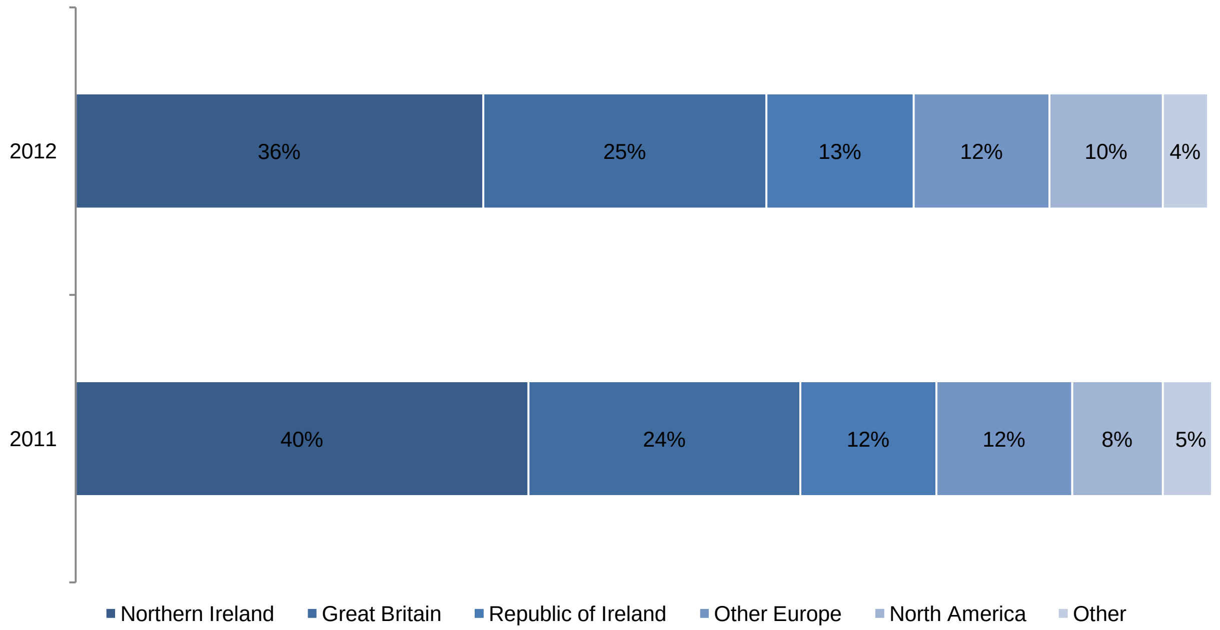
Figure 3: Guests to Northern Ireland GHBB 2011-2012 (000's)



Note (1) Percentages calculated using unrounded figures

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 (36%) this was followed by Great Britain (25%). Arrivals from the Republic of Ireland accounted for 13%, Other Europe 12% and North America 10%. Figure 4 shows the arrivals to Guest houses and Bed and Breakfasts in 2011 and 2012 by country of residence.

Figure 4: Arrivals to Northern Ireland GHBB 2011-2012



Note (1) Percentages calculated using unrounded figures

Guesthouses and Bed & Breakfasts
Average room occupancy in guesthouses rose by 12 percentage points in 2012 to 44%. Average bed-space occupancy also saw an increase of 13 percentage points to 34%.

Average room and bed-space occupancy in bed and breakfasts decreased by 1 percentage point and 2 percentage points respectively between 2011 and 2012 to 27% and 19%.

Guesthouses and Bed & Breakfasts – Price
Average guesthouse and bed and breakfast room and bed-space occupancy for 2012 was greatest in establishments priced £30+ (34% and 25%) and lowest in establishments priced £20-£29.99 (26% and 18%).
(Table 17)

Table 17: Room and Bed-space occupancy Rates (%) Breakdown, 2011-2012

	2011		2012		Change (2011-2012)[1]	
	Room %	Bed-Space %	Room %	Bed-Space %	Room (pps)	Bed-Space (pps)
All Guesthouses and B&Bs	**29**	**21**	**33**	**23**	**+4**	**+2**
Guesthouses	31	21	44	34	+12	+13
Bed & Breakfasts	28	21	27	19	-1	-2
Price						
<£20[2]	*	*	*	*	*	*
£20-£29.99	26	19	26	18	+1	-2
£30+	30	21	34	25	+4	+3

Note (1) Percentage change calculated using unrounded figures
*(2) * Sample size too small to provide a reliable estimate*

Monthly Occupancy Rates of Guesthouses and Bed &Breakfasts
Guesthouse and bed & breakfast occupancy during 2012 was highest in August (52%) and lowest in January (14%). Bed-space occupancy for guesthouses and bed & breakfasts was also highest in August (41%) and lowest in January (9%) during 2012. (See Table 18 for comparison with 2011).

Table 18: GHBB Monthly Occupancy

	2011		2012		Change (2011 -2012)[1]	
	Room (%)	Bed-Space (%)	Room (%)	Bed-Space (%)	Room (pps)	Bed-Space (pps)
January	15	10	14	9	-2	-1
February	21	15	18	12	-3	-3
March	20	13	24	16	+5	+3
April	30	23	29	19	-1	-4
May	34	27	39	26	+4	-1
June	36	26	46	35	+10	+9
July	40	30	47	34	+7	+4
August	49	37	52	41	+3	+4
September	37	28	42	31	+5	+3
October	30	21	34	24	+4	+3
November	19	13	25	18	+6	+5
December	15	11	23	16	+8	+5
Annual	**29**	**21**	**33**	**23**	**+4**	**+2**

Note (1) Percentage change calculated using unrounded figures

Average Length of Stay in Guesthouses and Bed & Breakfasts

Average length of stay in guesthouses and Bed & Breakfasts showed no change from 2011 to 2012, remaining at 1.5 nights.

The average length of stay for Northern Ireland residents in guesthouses/bed & breakfasts during 2012 was 1.4 nights showing no change when compared to 2011. The average length of stay for Non Northern Ireland residents in guesthouses/bed & breakfasts was 1.6 nights compared with 1.5 nights in 2011.

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 1.3 nights in April to 1.7 nights during the months of February and July. (See Table 19 for comparison with 2011 monthly average length of stay)

Table 19: Monthly Guesthouse/Bed & Breakfast average length of stay (nights) 2011-2012

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

Self-Catering

Size of establishment

During 2012, annual occupancy rose by 4 percentage points for self-catering establishments with 5-9 units. Seasonally, establishments with 5-9 units saw an increase of 12 percentage points in comparison to 2011, all other sized units saw decreases (-1 percentage point). Table 20 shows the annual and seasonal occupancy rates for Northern Ireland in 2011 and 2012.

Table 20: Occupancy by size of establishment 2011-2012

Size of establishment (no of units)	Annual occupancy (%)			Seasonal occupancy (%)		
	2011	2012	Change (pps)	2011	2012	Change (pps)
All	27	28	+1	40	42	+2
1-4	26	25	-1	38	38	-1
5-9	32	35	+4	43	55	+12
10+	36	34	-2	48	47	-1

Note (1) Percentage change calculated using unrounded figures

Establishment Grade

During 2012, four star establishments experienced a decrease in annual occupancy of 1 percentage point. All other graded establishments experienced increases in both annual and seasonal occupancy between 2011 and 2012. The sample size for one star establishment in 2011 and 2012 were too small to provide a reliable estimate.

Table 21: Self-Catering Occupancy Rates by establishment grade 2011-2012

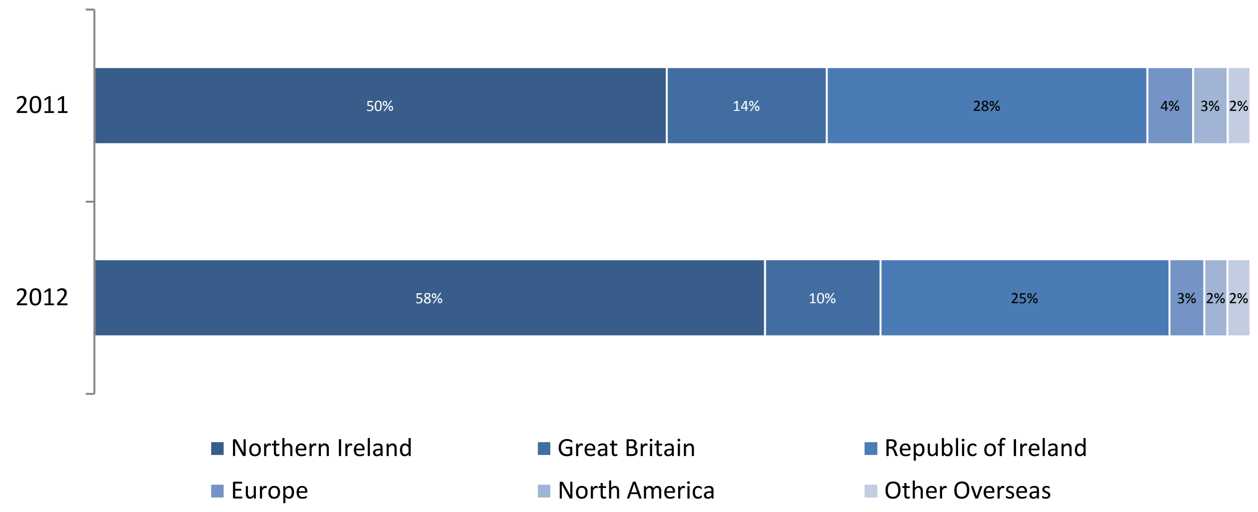
Establishment Grade	Annual occupancy (%)			Seasonal occupancy (%)		
	2011	2012	Change (pps)	2011	2012	Change (pps)
All	27	28	+1	40	42	+2
One star[2]	*	*	*	*	*	*
Two star[3]	20	24	+4	31	35	+5
Three star	25	27	+3	36	40	+5
Four star	30	29	-1	45	46	+1
Five star	26	30	+3	36	41	+5

Note (1) Percentage change calculated using unrounded figures
*(2) * Sample size too small to provide a reliable estimate*
(3) Estimates based on a sample size of 30 to 50 are displayed on a red background

Arrivals to Self-Catering

More than half (58%) of arrivals to self-catering establishments in 2012 were Northern Ireland residents this was an increase of 8 percentage points when compared to 2011. (Figure 5).

Figure 5 Arrivals to Self-Catering establishments (annual) by Country of Residence



Note (1) Percentages calculated using unrounded figures

There were increases in the number of arrivals to self-catering establishments in 2012 ranging from +79% from North America to +196% from Northern Ireland.

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. 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 32 establishments in total, but 199 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.

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

Data is weighted by the number of bed-spaces, number of rooms and district council. 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.

Self-catering Methodology

The 2012 self-catering survey was conducted by means of a postal questionnaire covering the period of January – December of that year. All owners of self-catering establishments were asked to provide the length of stay, number of arrivals and country of residence for each arrival for each booking throughout the year. Owners were also asked to provide an estimated income for the year.

In 2012, there were a total of 1,424 establishments in the self-catering stock. Of these, 400 returned a completed form resulting in a 28% response rate.

Data was analysed by size of establishments, season and visitor's country of origin.

All of the analysis was carried out using a weighting procedure which takes into account non respondents. The weights were calculated by local authority and number of units. Statistics presented in this report pre-2009 are NITB statistics.

The following definitions are employed throughout the chapter in reference to self-catering;

"**establishmen**t" refers to the total property of self-catering chalets/houses/flats

"**units**" refer to the actual number of chalets/houses/flats within an establishment

"**seasona**l" refers to the period "April-September"

Further Information

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

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