

NI Hotel, Bed & Breakfast and Guesthouse Occupancy Survey (January - December 2014)

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This report provides analysis of the 2014 Northern Ireland hotel, bed & breakfast and guesthouse occupancy survey. The key findings are:

- average room occupancy in hotels during 2014 was 65%, an increase of 1 percentage point from 2013. Bed-space occupancy showed no change (46%);
- average room occupancy for Guesthouses and Bed & Breakfasts in 2014 was 28% showing a decrease of 2 percentage points on 2013 while bed-space occupancy showed no change (21%);
- average hotel occupancy rates were highest for 4/5 star hotels who experienced room occupancy of 68% and bed-space occupancy of 51%; and
- the figures point towards a positive year for hotels especially those at the top of the market but that bed & breakfasts and guesthouses had a more challenging year.

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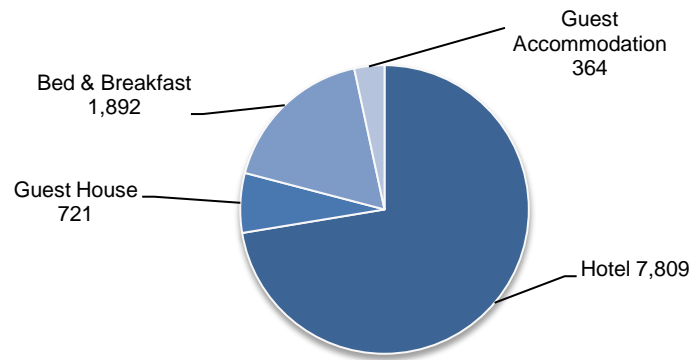
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Accommodation Stock

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

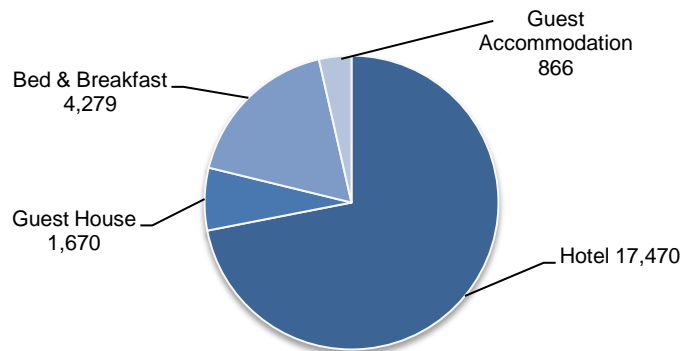
Figure 1: Northern Ireland Room Stock 2014



**Total Room Stock:
10,786**

As of end December 2014 there were a total of 822 hotels, guesthouses, bed & breakfasts and guest accommodation offering accommodation in Northern Ireland.

Figure 2: Northern Ireland Bed Space Stock 2014



**Total Bed Space
Stock: 24,285**

This consisted of 134 hotels, 36 guest accommodation, 92 guesthouses and 560 bed & breakfasts. The number of hotels decreased by 3% when compared to 2013, while the number of hotel rooms and beds both decreased by 1%.

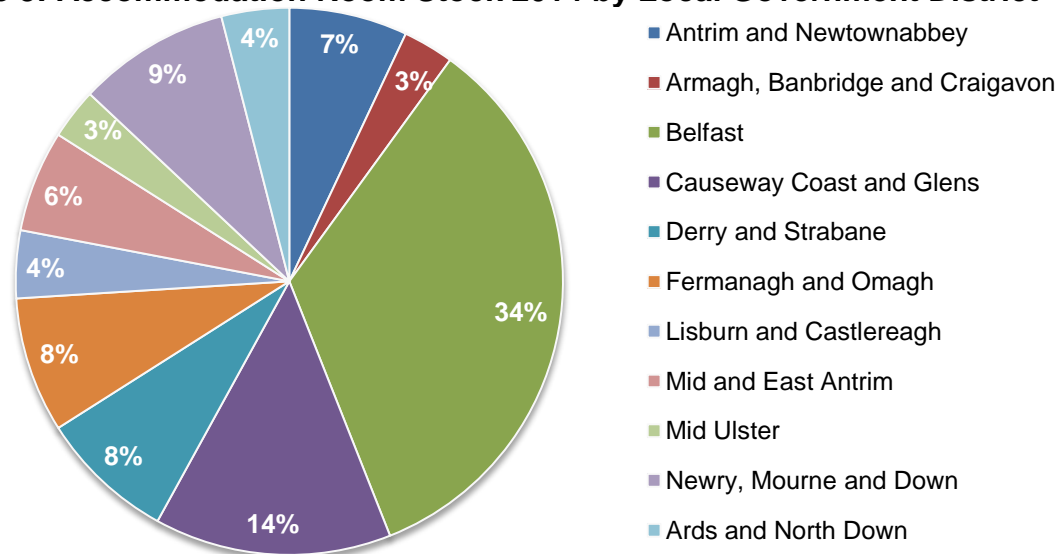
The number of guesthouses, bed & breakfasts and guest accommodation also decreased by 3%, while the room and bed stock both decreased by 2%.

The room and bed stock available by accommodation type can be seen in figures 1 and 2.

Full information on Northern Ireland accommodation stock can be found at the following link [NI Hotel, Bed & Breakfast and Guesthouse Occupancy Survey Additional Tables](#)

Stock levels and Occupancy Rate by Local Government District

Figure 3: Accommodation Room Stock 2014 by Local Government District

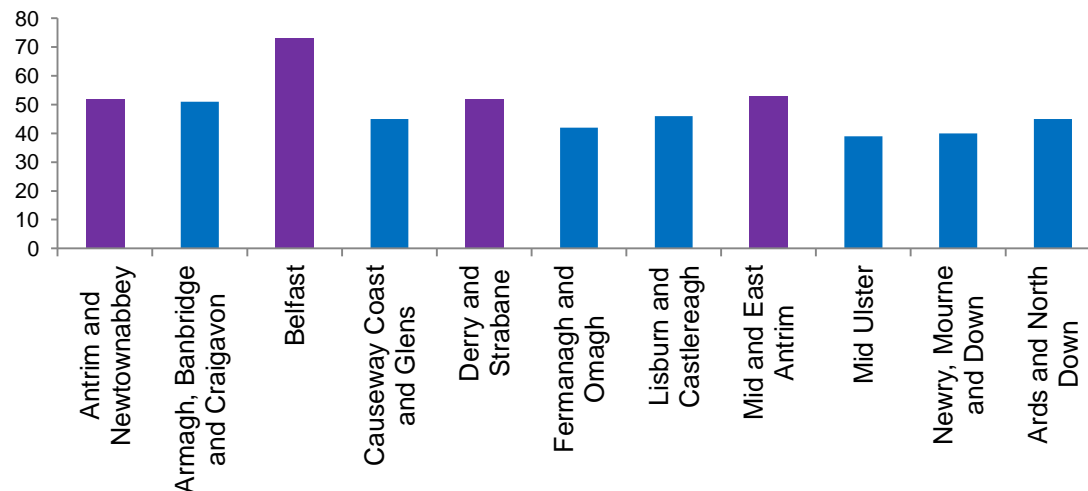


Room Stock

Belfast
Causeway Coast and Glens
Newry, Mourne and Down

Belfast accounted for the highest share of accommodation rooms with 34% of the rooms stock in Northern Ireland. Causeway Coast and Glens accounted for the second highest room stock (14%) with Newry, Mourne and Down third (9%).

Figure 4: Accommodation Room Occupancy 2014 by Local Government District



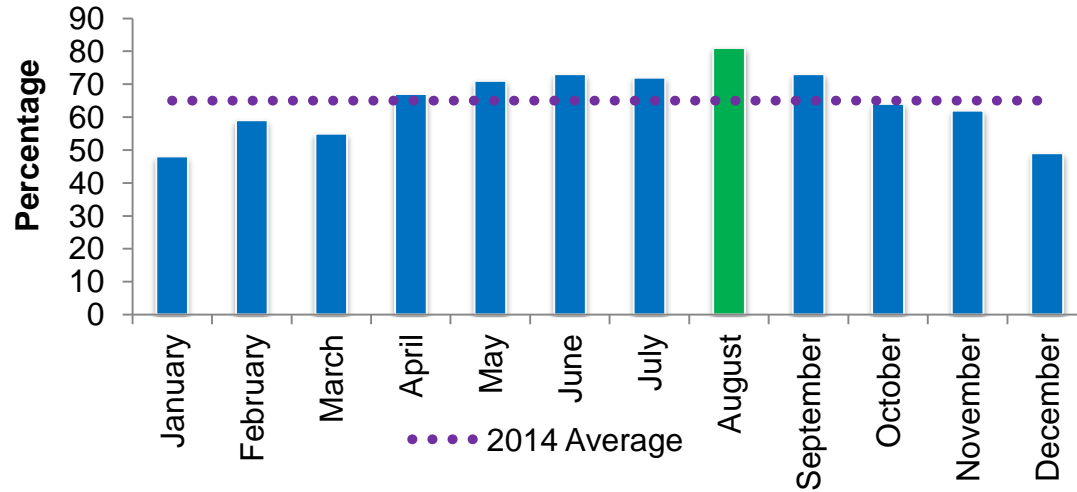
Room Occupancy

Belfast
Mid and East Antrim
Armagh, Banbridge and Craigavon;
Derry and Strabane

Belfast had the highest room occupancy during 2014 (73%). Mid and East Antrim experienced the second highest occupancy rates during 2014 (53%) closely followed by Antrim and Newtownabbey and Derry and Strabane (52%).

Hotel Occupancy

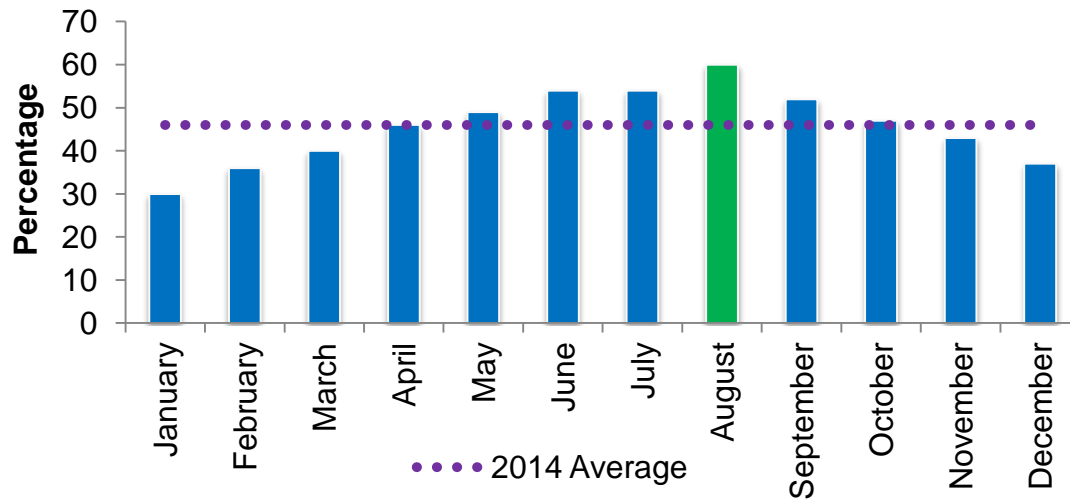
Figure 5: Northern Ireland Hotel Room Occupancy by Month 2014



During January – December 2014 room occupancy rates in Northern Ireland hotels were 65% an increase of 1 percentage point when compared to the same period of 2013. Bed space occupancy rates showed no change (46%).

Room and bed-space occupancy rates vary from month to month. Hotel monthly room and bed space occupancy during 2014 was highest in the month of August (81% and 60% respectively). January saw the lowest monthly occupancy rates of 48% room occupancy and 30% bed space occupancy.

Figure 6: Northern Ireland Hotel Bed Space Occupancy by Month 2014



There were 1,849,500 hotel rooms sold and 2,939,500 hotel bed spaces sold in Northern Ireland during 2014. The number of rooms sold increased by 3% while the number of bed spaces sold increased by 1%.

Full information on Northern Ireland Hotel Occupancy Statistics can be found at the following link [NI Hotel, Bed & Breakfast and Guesthouse Occupancy Survey Additional Tables](#)

Guesthouse, Bed & Breakfast and Guest accommodation Occupancy

Figure 7: NI Guesthouse, Bed & Breakfast and Guest Accommodation Room Occupancy by Month 2014

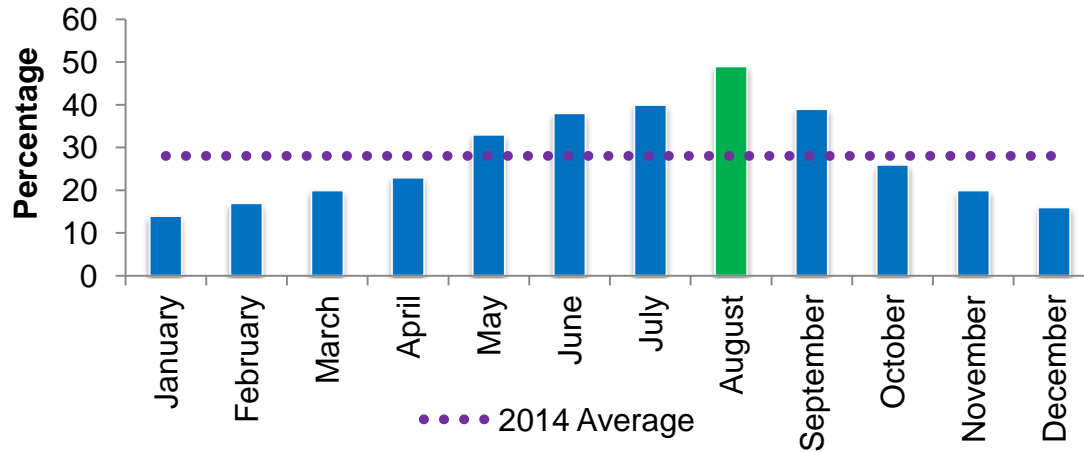
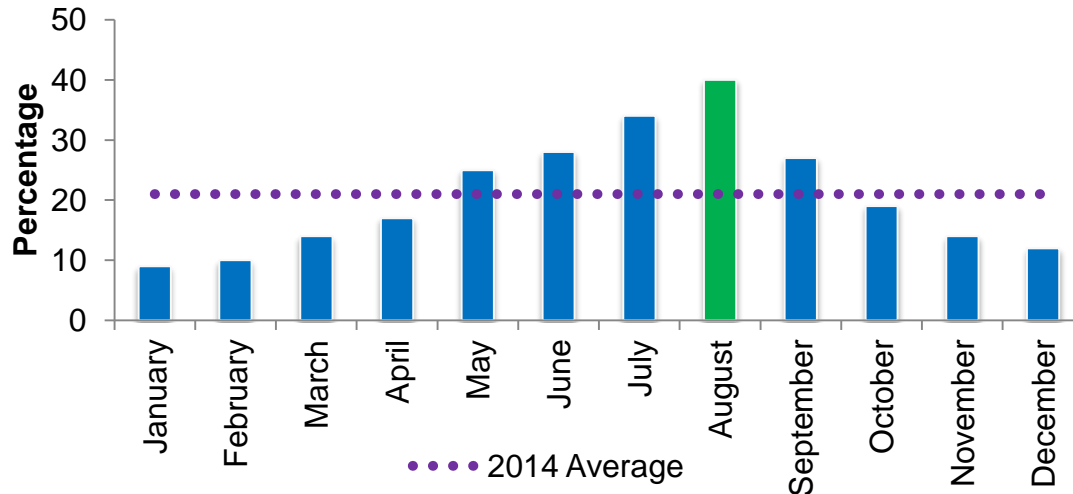


Figure 8: NI Guesthouse, Bed & Breakfast and Guest Accommodation Bed Space Occupancy by Month 2014



During January to December 2014 the room occupancy rate in Northern Ireland guesthouses, bed & breakfasts and guest accommodation was 28% while bed space occupancy was 21%. This was a 2 percentage point decrease in room occupancy, while bed space occupancy showed no change.

Guesthouses, bed and breakfasts and guest accommodation followed the same trend to hotels with the highest occupancy rates experienced in August (49% room occupancy and 40% bed space occupancy) and the lowest rates in January (14% room occupancy and 9% bed space occupancy).

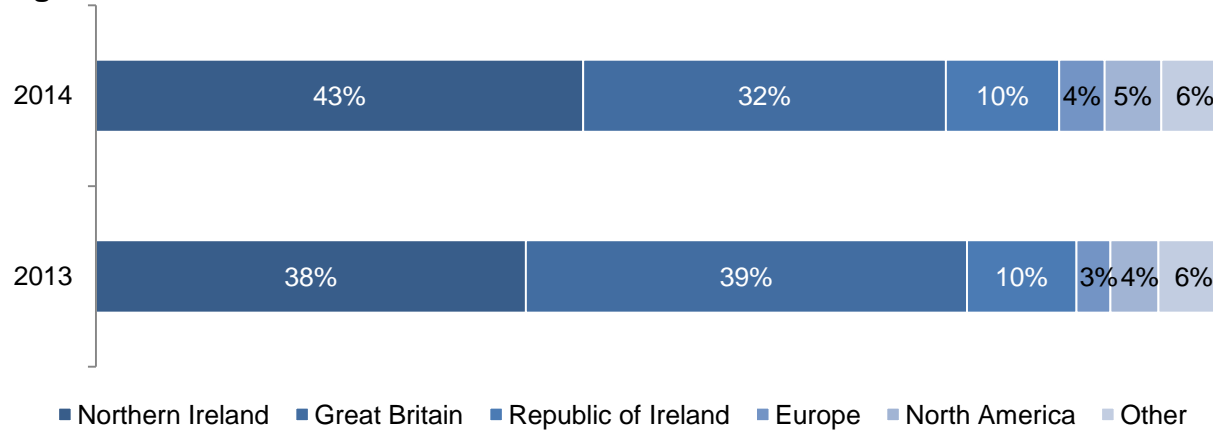
During 2014 the number of rooms sold in Northern Ireland guesthouses, bed & breakfasts and guest accommodation decreased by 7% to 315,700, while the number of bed spaces sold decreased by 4% to 534,000.

Full information on Northern Ireland Guesthouse, Bed & Breakfast and Guest Accommodation Statistics can be found at the following link

[NI Hotel, Bed & Breakfast and Guesthouse Occupancy Survey Additional Tables](#)

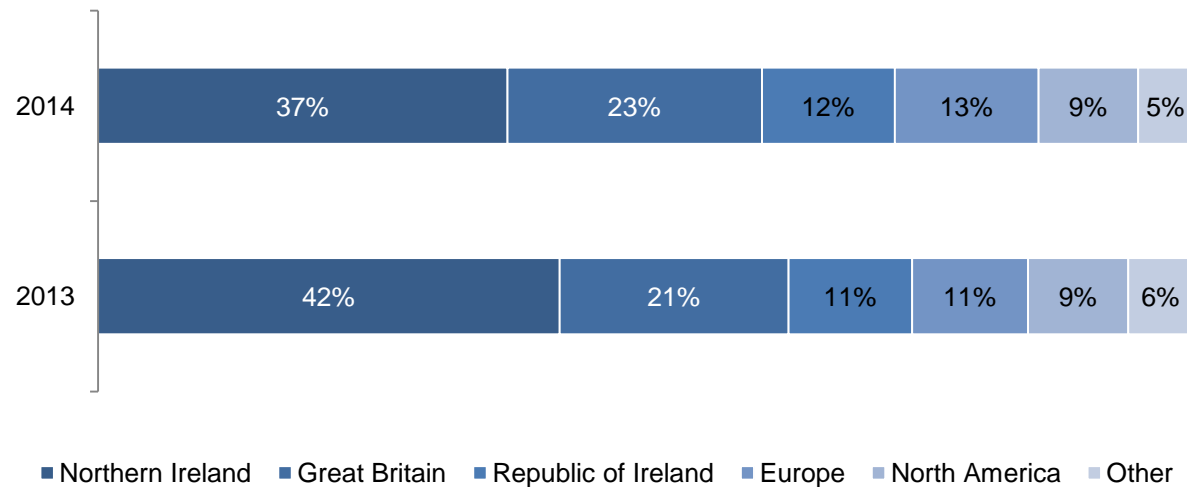
Arrivals

Figure 9: Arrivals to Northern Ireland Hotels 2013 - 2014



In 2014 the highest proportion of arrivals to Northern Ireland hotels were from Northern Ireland (43%) and Great Britain (32%). The proportion of arrivals from Northern Ireland showed a 5 percentage point increase while those from Great Britain decreased by 7 percentage points. The proportion of arrivals from Europe and North America both increased by 1 percentage point when compared to the previous year.

Figure 10: Arrivals to Northern Ireland Guesthouses, Bed & Breakfasts and Guest Accommodation 2013 - 2014

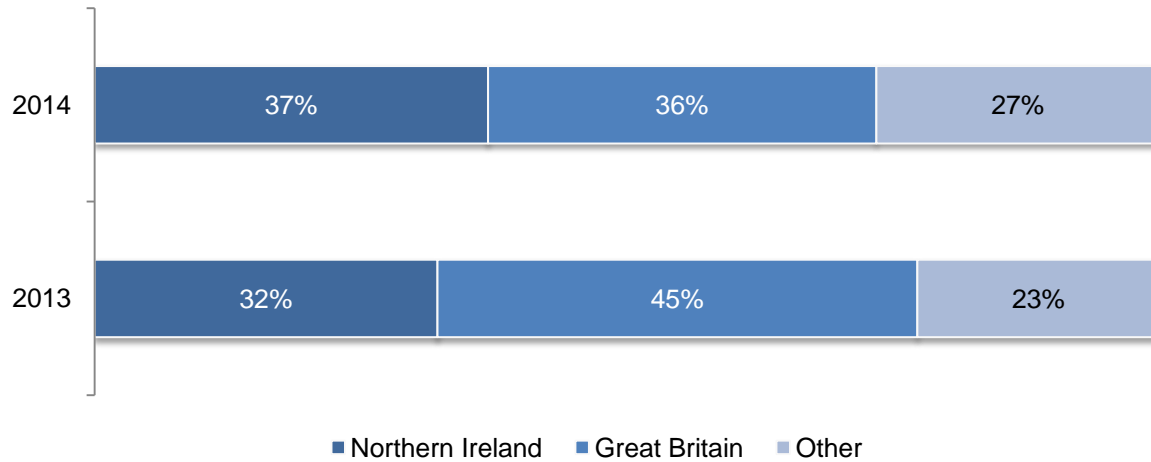


In 2014 the highest proportion of arrivals to Northern Ireland guesthouses, bed & breakfasts and guest accommodation came from Northern Ireland (37%) and Great Britain (23%). The proportion of arrivals from Northern Ireland decreased by 5 percentage points while arrivals from Great Britain rose by 2 percentage points on the previous year. The proportion of arrivals from the Republic of Ireland increased by 1 percentage point whilst the proportion of European arrivals increased by 2 percentage points when compared to 2013.

Full information on Northern Ireland Hotel, Guesthouse, Bed & Breakfast and Guest Accommodation Statistics can be found at the following link [NI Hotel, Bed & Breakfast and Guesthouse Occupancy Survey Additional Tables](#)

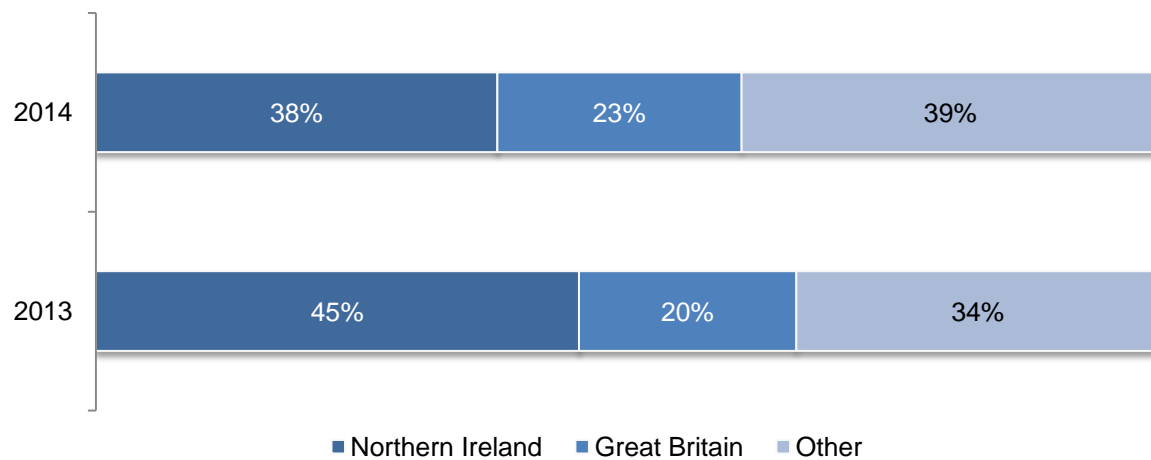
Guests

Figure 11: Guests to Northern Ireland Hotels 2013 - 2014



During 2014 63% of hotel guests were from outside Northern Ireland. The proportion of guests from Northern Ireland increased by 5 percentage points, while the proportion of guests from other countries increased by 4 percentage points when compared to 2013. The proportion of guests from Great Britain decreased by 9 percentage points.

Figure 12: Guests to Northern Ireland Guesthouses, Bed & Breakfasts and Guest Accommodation 2013 - 2014



During 2014 62% of guest house, Bed & breakfast and guest accommodation guests were from outside Northern Ireland. There was an 8 percentage point decrease in the proportion of guests from Northern Ireland during 2014. The proportion of guests from Great Britain and other countries increased by 3 percentage points and 5 percentage points respectively on the previous year.

Full information on Northern Ireland Hotel, Guesthouse, Bed & Breakfast and Guest Accommodation Statistics can be found at the following link [NI Hotel, Bed & Breakfast and Guesthouse Occupancy Survey Additional Tables](#)

Methodology

To offer tourist accommodation in NI, you must have a certificate from Tourism Northern Ireland (TNI) - TNI refers to this as certification. It is illegal to offer tourist accommodation in NI without a certificate from TNI. The list of certified accommodation from TNI is known as the 'stock'.

Historically the random sample of guesthouses, B&Bs and guest accommodation drawn from the stock provided by Tourism NI was extended to include good responders and those with 5+ rooms. Since January 2013 Tourism Statistics Branch has been selecting respondents on a stratified random sample basis. Monitoring of the old and new systems has shown no bias. Having built up a two year time series Tourism Statistics Branch will now begin to publish on the new stratified random sample basis. Information for guesthouses, B&Bs and guest accommodation is therefore only available for January 2013 onwards due to these changes in the survey sampling methodology.

The sample is drawn at different rates according to local government district as the number of establishments in each area can differ. To ensure valid data for each area, a different sampling rate is 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 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

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 questionnaire, 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 rather than 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 from month to month 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.

The bed-space occupancy rate calculation = $(\text{Total number of bed-spaces occupied} / \text{total number of bed-spaces available}) * 100$

Bed-space occupancy rates exclude those who have not provided the appropriate breakdown of information i.e. those who have not provided information on the number of guests.

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.

The room occupancy rate calculation = $(\text{Total number of rooms occupied} / \text{Total number of rooms available}) * 100$

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. Bed-spaces sold for exclude those who have not provided the appropriate breakdown of information i.e. those who have not provided information on the number of guests.

Stock

Stock is provided by Tourism Northern Ireland. Stock levels used are as of month's end of the previous month.

Geographic Referencing

Information is presented for Northern Ireland and local government districts as follows:

Antrim & Newtownabbey Borough Council
Armagh City, Banbridge & Craigavon Borough Council
Belfast City Council
Causeway Coast & Glens District Council
Derry City & Strabane District Council
Fermanagh & Omagh District Council
Lisburn & Castlereagh City Council
Mid & East Antrim Borough Council
Mid Ulster District Council
Newry, Mourne & Down District Council
Ards & North Down Borough Council

A full picture of all tourism activity can be found in the [Northern Ireland Annual Tourism Statistics Publication](#).

Further Information

Tables containing data used in this publication can be found at: [NI Hotel, Bed & Breakfast and Guesthouse Occupancy Survey Additional Tables](#).

For more information relating to this publication or if an alternative format is required, please contact us at tourismstatistics@dfpni.gov.uk

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