

Northern Ireland Annual Guesthouse, Bed & Breakfast and Guest Accommodation Occupancy Survey 2017

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The key points are:

- during 2017 room occupancy for Guesthouses, Bed & Breakfasts and Guest Accommodation was an estimated 37% while estimated bed-space occupancy was 28%;
- during 2017 there were an estimated 423,000 rooms sold in Guesthouses, Bed & Breakfasts and Guest Accommodation;
- the figures point towards a positive year for Guesthouses, Bed & Breakfasts and Guest Accommodation. Estimates suggest 2017 saw the highest Guesthouse, Bed & Breakfast and Guest Accommodation occupancy rates of any year from 2013 onwards.

Lead Statistician:

Sarah McAuley
Tourism Statistics Branch,
NISRA,
Colby House,
Stranmillis Court
BELFAST
BT9 5RR

Telephone: 028 9025 5160

Email: tourismstatistics@nisra.gov.uk

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Introduction

This report provides statistics on Guesthouse, Bed & Breakfast and Guest Accommodation occupancy rates in Northern Ireland during 2017. As occupancy statistics are survey based estimates the statistics provided are an indicator of how Guesthouse, Bed & Breakfast and Guest Accommodation are performing.

What you can say....

Whilst we cannot say there has been a statistically significant change in Guesthouse, Bed & Breakfast and Guest Accommodation occupancy rates year on year, when looking at the full picture sources point towards a slight increase since 2013.

What you cannot say....

During January to December 2017 there was a definite increase in Northern Ireland Guesthouse, Bed & Breakfast and Guest Accommodation room occupancy rates to 37% compared to 34% during 2016.

This report should be read in conjunction with other tourism statistics reports for a full picture. When looking at the Guest house, Bed & Breakfast and Guest Accommodation sector from 2013 occupancy rates have been volatile. Estimates would suggest that 2017 occupancy rates have seen a slight increase from 2013, however we cannot say that this increase was statistically significant.

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

Guesthouse, Bed & Breakfast and Guest 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.

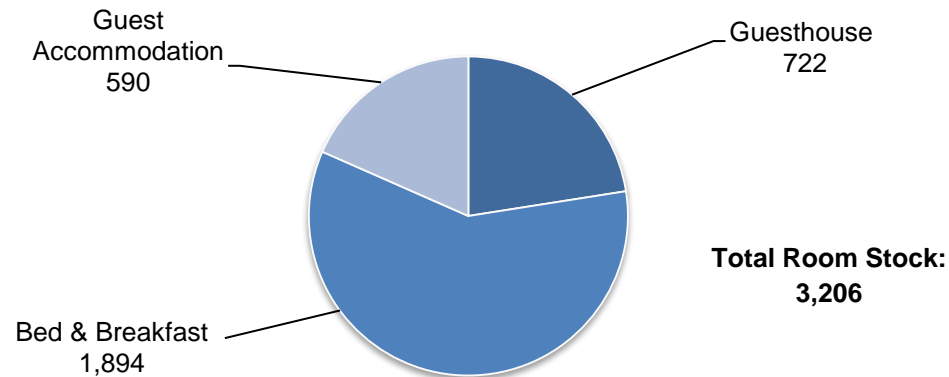
Table 1: Northern Ireland Guesthouse, Bed & Breakfast and Guest Accommodation (GHBBGA) Stock 2017

Year	GHBBGA	Rooms	Bed Spaces
2013	709	3,045	6,948
2014	688	2,978	6,815
2015	686	2,999	6,876
2016	739	3,158	7,224
2017	762	3,206	7,296
Change 16/17	3%	2%	1%

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

Accommodation Stock

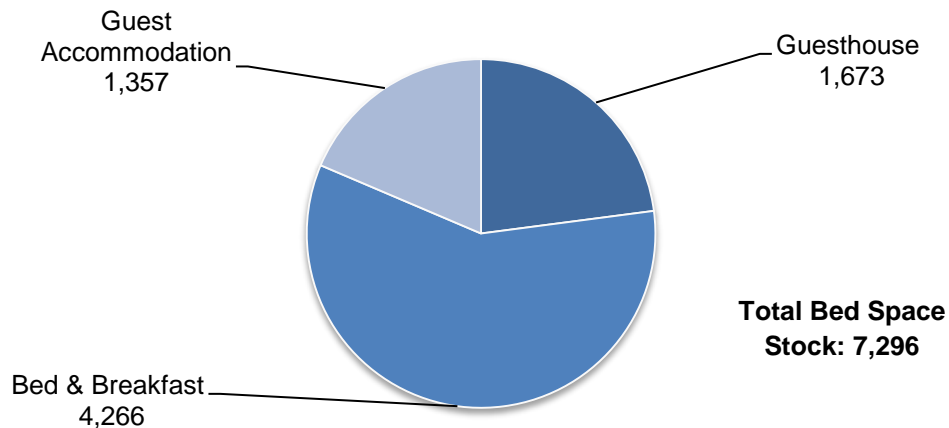
Figure 1: Northern Ireland Guesthouse, B&B, Guest Accommodation Room Stock 2017



As of the end of December 2017 there were a total of 762 guesthouses, bed & breakfasts and guest accommodation offering accommodation in Northern Ireland.

This consisted of 85 guesthouses, 99 guest accommodation and 578 bed & breakfasts.

Figure 2: Northern Ireland Guesthouse, B&B, Guest Accommodation Bed Space Stock 2017



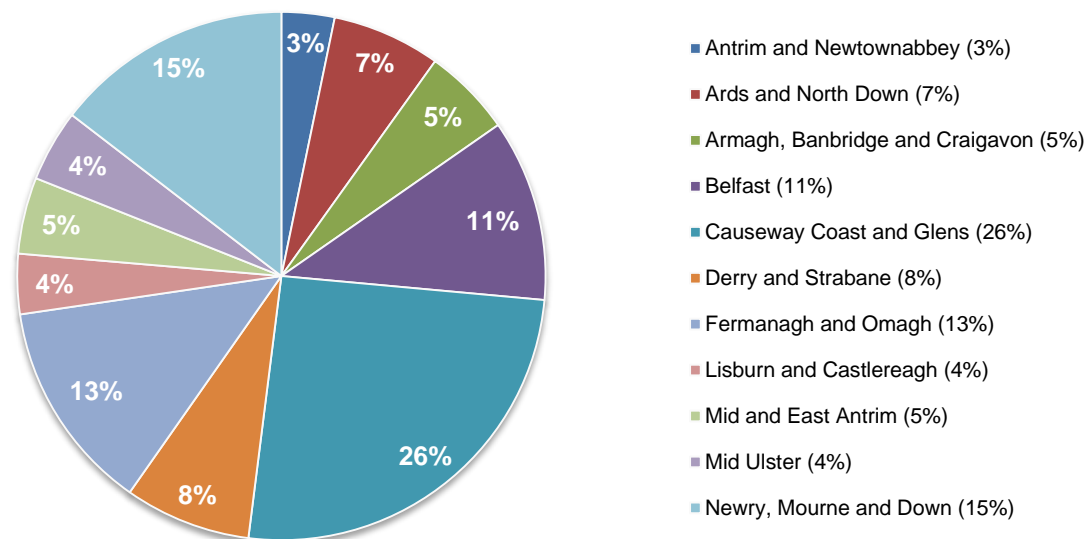
The number of establishments increased by 3% when compared to 2016, while the number of available rooms increased by 2% and the number of beds available increased by 1%.

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 Bed & Breakfast and Guesthouse Occupancy Survey Additional Tables](#)

Stock levels and Occupancy Rate by Local Government District

Figure 3: Guesthouse, B&B, Guest Accommodation Room Stock 2017 by Local Government District

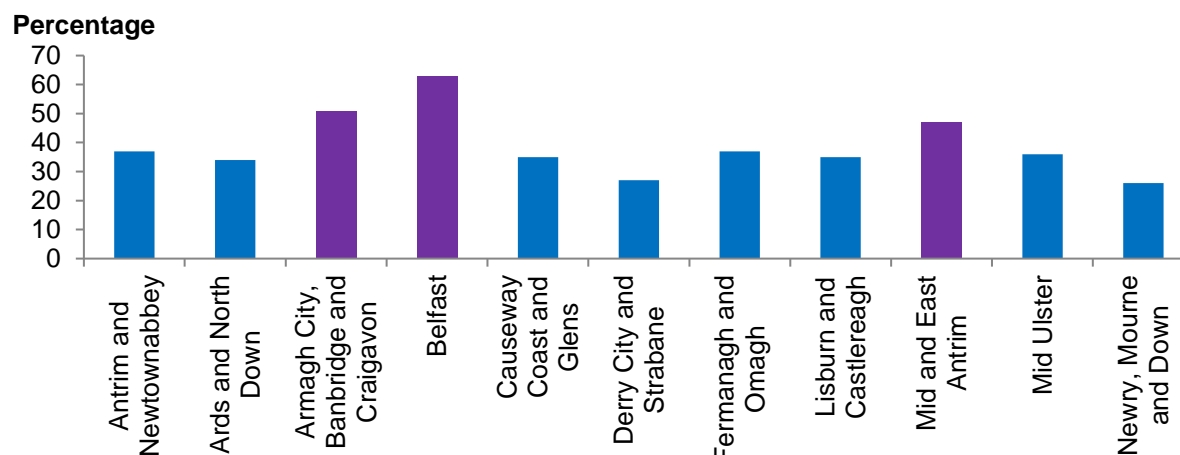


Room Stock

Causeway Coast and Glens
Newry, Mourne and Down
Fermanagh and Omagh

Causeway Coast and Glens accounted for the highest share of accommodation rooms with 26% of the rooms stock in Northern Ireland. Newry, Mourne and Down accounted for the second highest room stock (15%) with Fermanagh and Omagh third (13%).

Figure 4: Accommodation Room Occupancy 2017 by Local Government District



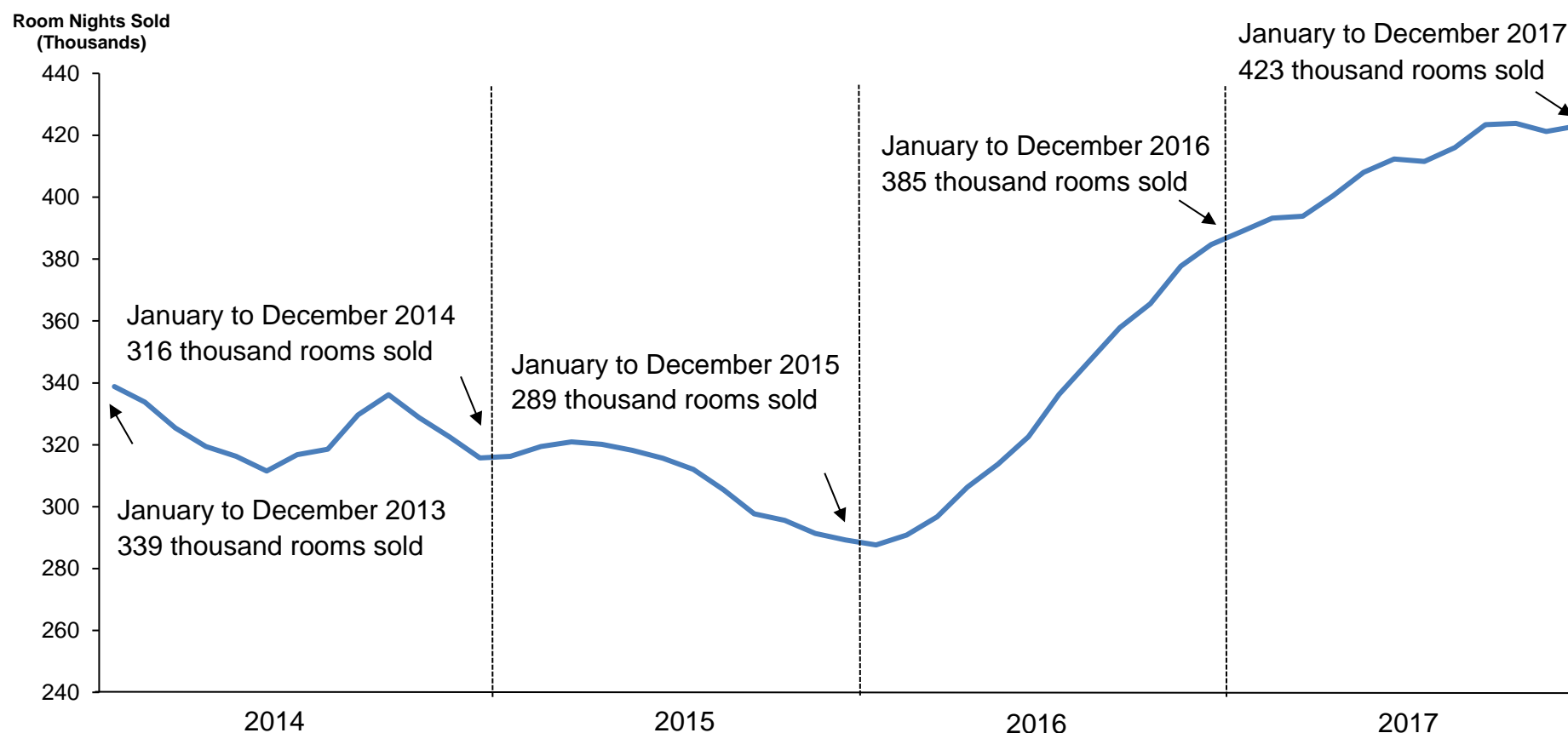
Room Occupancy

Belfast
Armagh City, Banbridge & Craigavon
Mid & East Antrim

Belfast had the highest room occupancy during 2017 (63%). Armagh City, Banbridge & Craigavon experienced the second highest occupancy rates during 2017 (51%) followed by Mid & East Antrim (47%)

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

Figure 5: Estimated Rolling Twelve Months Guesthouse, Bed & Breakfast and Guest Accommodation Room Nights Sold (non zero axis)



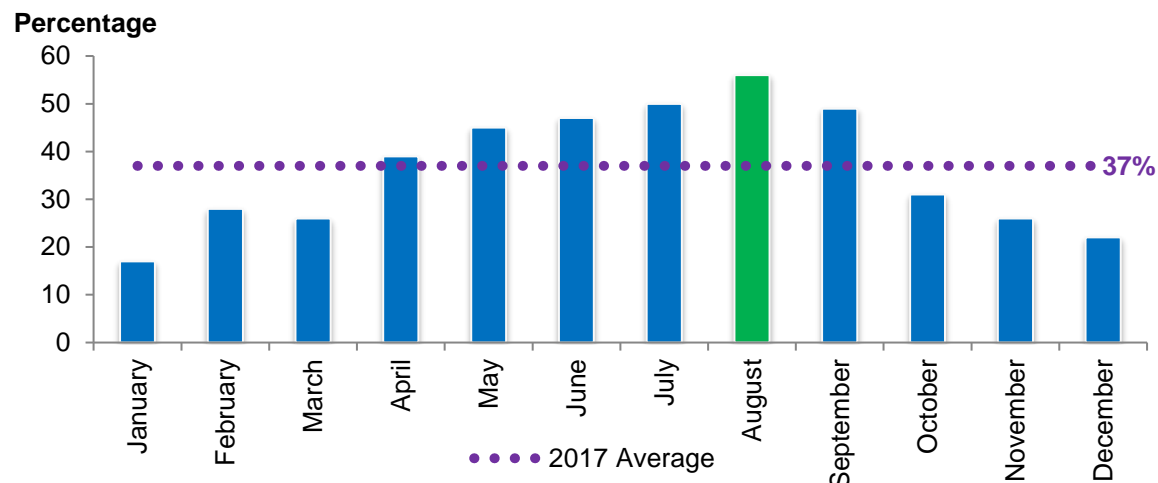
Figures for 2017 show the number of rooms nights sold in Northern Ireland Guesthouses, Bed & Breakfasts and Guest Accommodation was an estimated 423,000, with an estimated 726,000 bed spaces sold over the same period. When looking at the Guest house, Bed & Breakfast and Guest Accommodation sector from 2013 the number of room nights sold has been volatile. Estimates would suggest that room nights sold during 2017 have seen a slight increase from 2013; however we cannot say that this increase has been statistically significant.

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

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

Guesthouse, Bed & Breakfast and Guest accommodation Occupancy

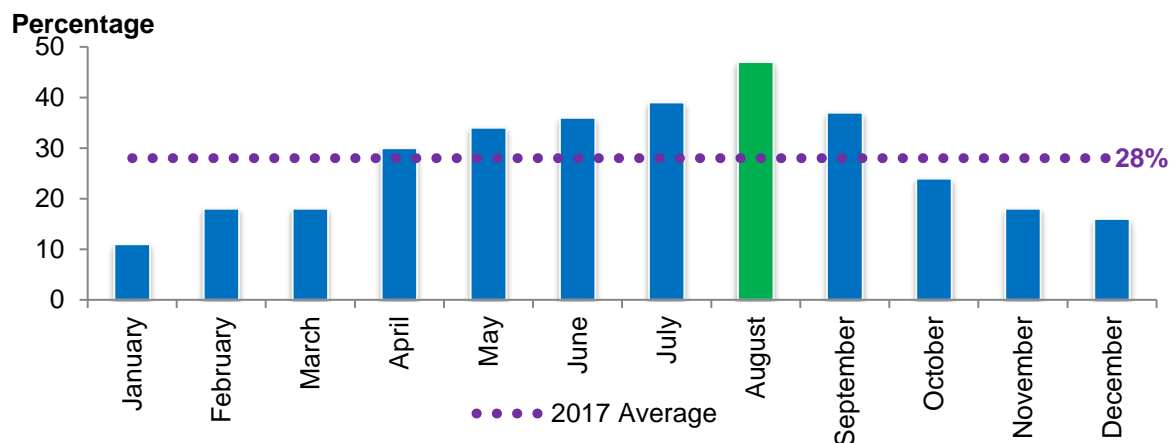
Figure 6: NI Guesthouse, Bed & Breakfast and Guest Accommodation Room Occupancy by Month 2017



During January to December 2017 the room occupancy rate in Northern Ireland guesthouses, bed & breakfasts and guest accommodation was 37% while bed space occupancy was 28%.

Room and bed-space occupancy rates vary from month to month. guesthouses, bed & breakfasts and guest accommodation monthly room and bed space occupancy during 2017 was highest in the month of August (56% and 47% respectively).

Figure 7: NI Guesthouse, Bed & Breakfast and Guest Accommodation Bed Space Occupancy by Month 2017



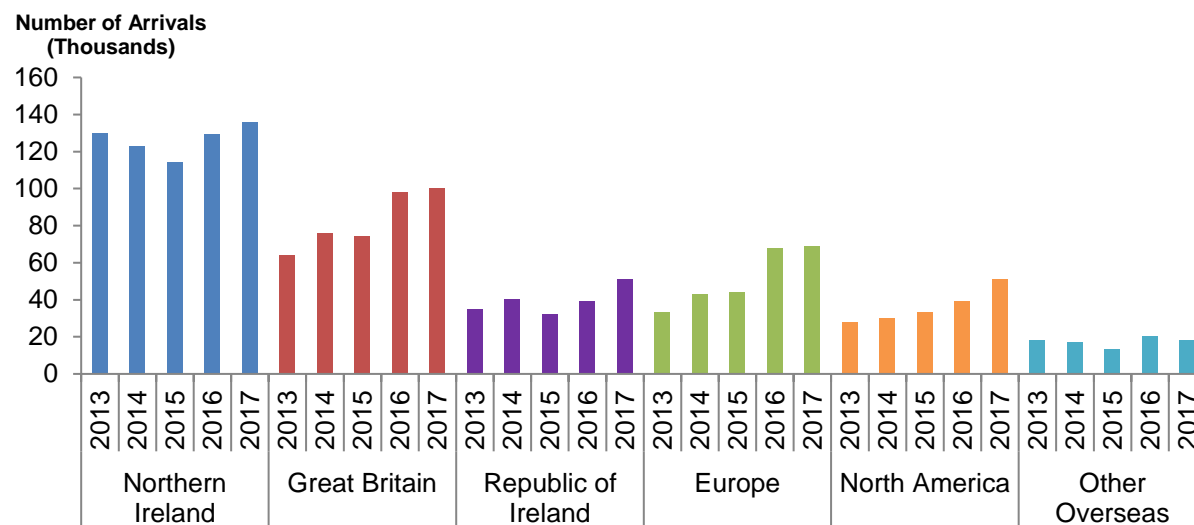
January saw the lowest monthly occupancy rates of 17% room occupancy and 11% bed space occupancy.

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

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

Arrivals and Guests

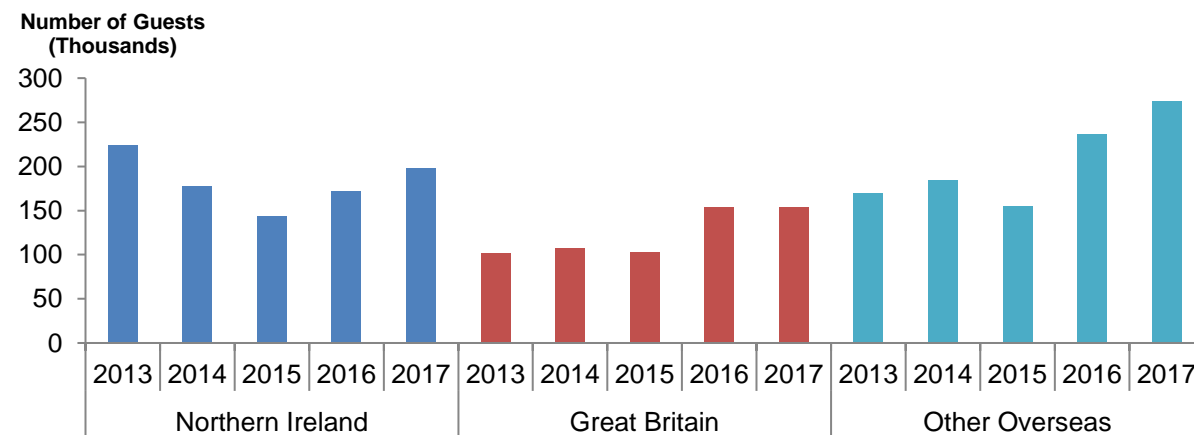
Figure 8: Arrivals to Northern Ireland Guesthouses, Bed & Breakfasts and Guest Accommodation 2013 - 2017



It is estimated that there were 426,000 arrivals to Northern Ireland guesthouses, bed & breakfasts and guest accommodation during 2017.

There were an estimated 136,000 thousand arrivals from Northern Ireland, accounting for almost a third of the total arrivals for the year (32%). Arrivals from Great Britain made up around a quarter of all arrivals (24%) with an estimated 100,000 arrivals during 2017.

Figure 9: Guests to Northern Ireland Guesthouses, Bed & Breakfasts and Guest Accommodation 2013 - 2017



During 2017 there were an estimated 625,000 guests staying in Northern Ireland guesthouses, bed & breakfasts and guest accommodation.

Around 68% of guests were from outside Northern Ireland (427,300).

Information for Guesthouses, Bed & Breakfasts and Guest Accommodation is only available from 2013 onward due to a change in the survey sampling methodology

Background Notes

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. Definitions of tourism statistics common terms can be found at the following [link](#).

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 excludes 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@nisra.gov.uk

More information on data quality can be found at [Data Quality Report](#).

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