

Northern Ireland Annual Guesthouse, Bed & Breakfast and Guest Accommodation Occupancy Survey 2019

Published 22 October 2020

The key points are:

- during 2019 there were an estimated 456,000 rooms sold in guesthouse, bed & breakfasts and guest accommodation, showing little change from 454,000 in the previous year;
- during 2019 there was a large increase in stock levels with 10% more rooms and bed spaces available compared to 2018;
- during 2019 room occupancy for guesthouse, bed & breakfasts and guest accommodation was an estimated 33% while estimated bed-space occupancy was an estimated 26%;
- the figures point towards a positive year for guesthouse, bed & breakfasts and guest accommodation. Estimates suggest 2019 saw the highest guesthouse, bed & breakfasts and guest accommodation rooms sold on record.

Lead Statistician:

Louise Walker
Tourism Statistics Branch,
NISRA,

Telephone: 028 9025 5162

Email:

tourismstatistics@nisra.gov.uk

Frequency: Annual
Coverage: Northern Ireland
Theme: People and Places

Contents:

Introduction	1
Accommodation stock	2
Rooms and beds sold	4
Occupancy rates	5
Arrivals & guests	6
LGD comparison	8
Background notes	9

Introduction

This report provides statistics on guesthouse, bed & breakfasts and guest accommodation occupancy rates in Northern Ireland during 2019. As occupancy statistics are survey based estimates the statistics provided are an indicator of how guesthouse, bed & breakfasts and guest accommodation are performing.

What you can say....

Whilst we cannot say there has been a statistically significant change in guesthouse, bed & breakfasts and guest accommodation rooms sold year on year, when looking at the full picture sources point towards an increase since 2013.

What you cannot say....

During January to December 2019 there was a definite 1 percentage point increase in room occupancy to 47% in guesthouses, bed and breakfasts and guest accommodation.

This report should be read in conjunction with other tourism statistics reports for a full picture. When looking at the guesthouse, bed & breakfasts and guest accommodation sector from 2013 occupancy rates have been volatile. However estimates suggest an increase on rooms sold over this period.

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

Guesthouse, bed & breakfasts and guest accommodation stock

To offer tourist accommodation in Northern Ireland, you must have received certification from Tourism Northern Ireland (TNI). It is illegal to offer tourist accommodation in NI without a valid 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 & breakfasts and guest accommodation (GHBBGA) stock 2013-2019

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
2018	832	3,619	8,231
2019	955	3,975	9,073
Change 2018-2019	15%	10%	10%

As of the end of December 2019 there were a total of 955 guesthouse, bed & breakfasts and guest accommodation offering accommodation in Northern Ireland.

This consisted of 78 guesthouses, 227 guest accommodation and 650 bed & breakfasts.

The number of establishments increased by 15% when compared to 2018, while the number of available rooms and bed spaces both increased by 10%.

Figure 1: Northern Ireland guesthouse, bed & breakfasts and guest accommodation room stock 2019

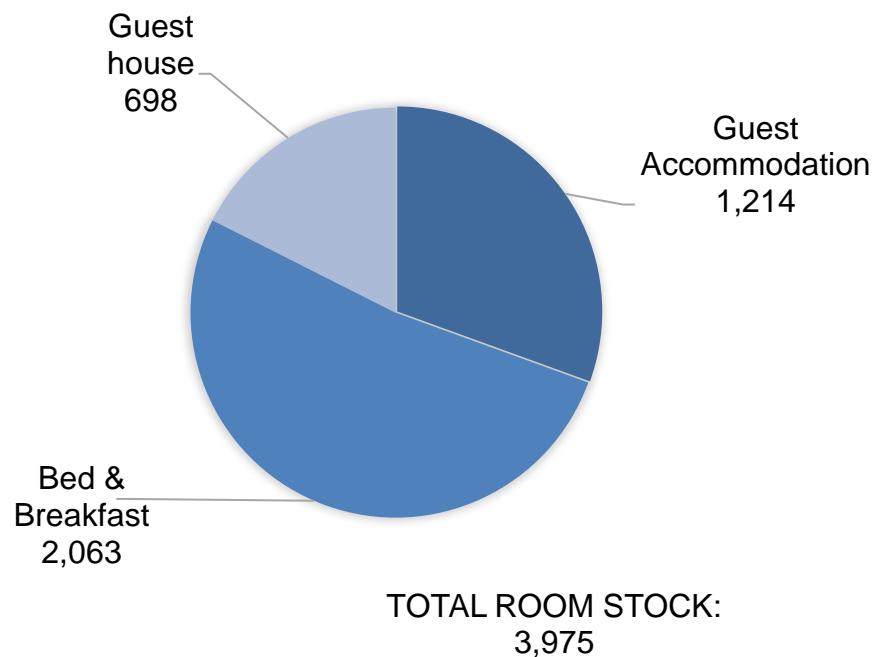
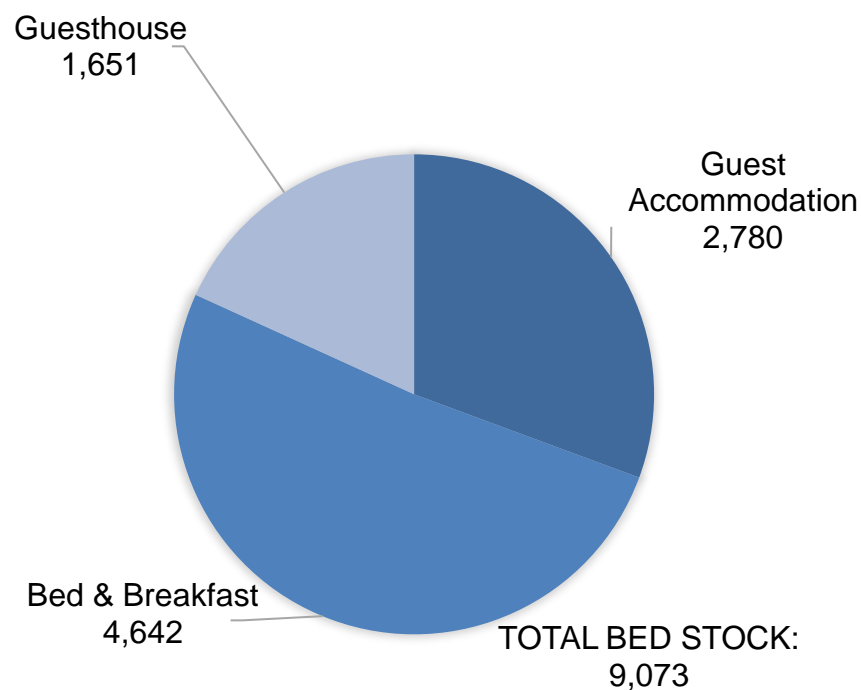


Figure 2: Northern Ireland guesthouse, bed & breakfasts and guest accommodation bed space stock 2019

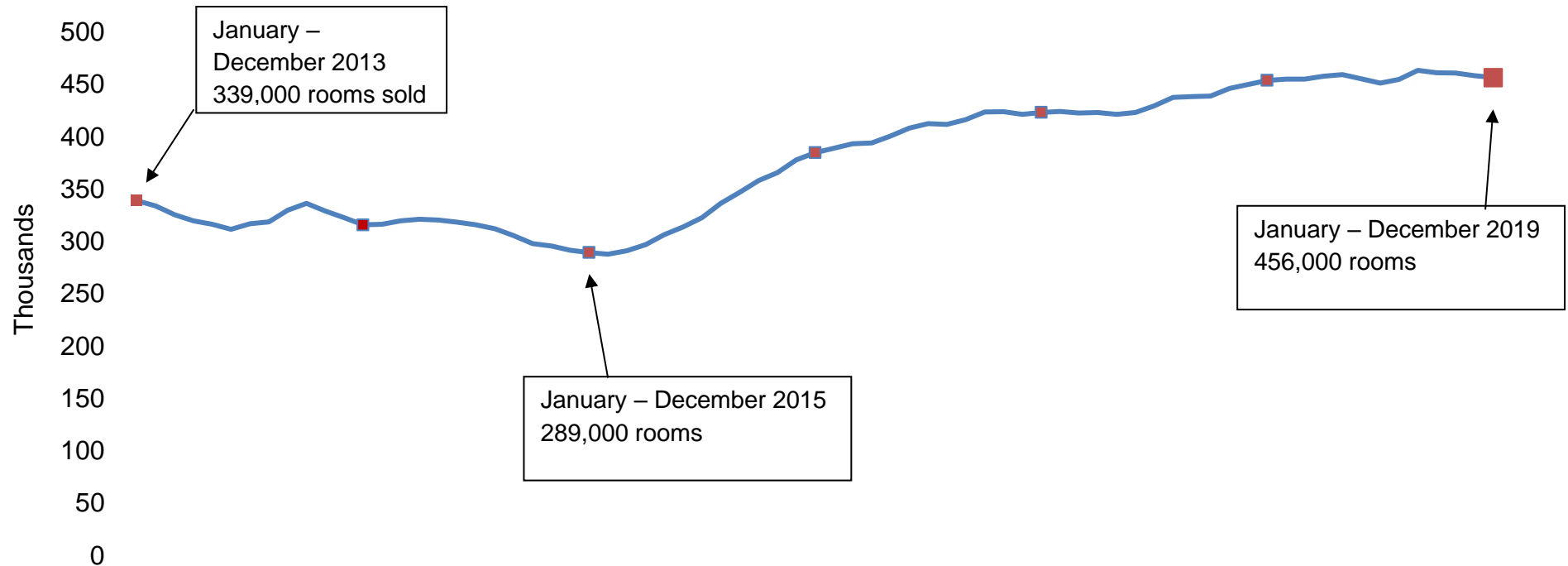


The room and bed stock available by accommodation type can be seen in figures 1 and 2.

Bed and breakfasts provide the majority of this stock within the guesthouse, bed & breakfasts and guest accommodation sector with 2,063 rooms (51.9%) and 4,642 bed spaces (51.2%) available.

Guesthouse, bed & breakfasts and guest accommodation occupancy nights sold

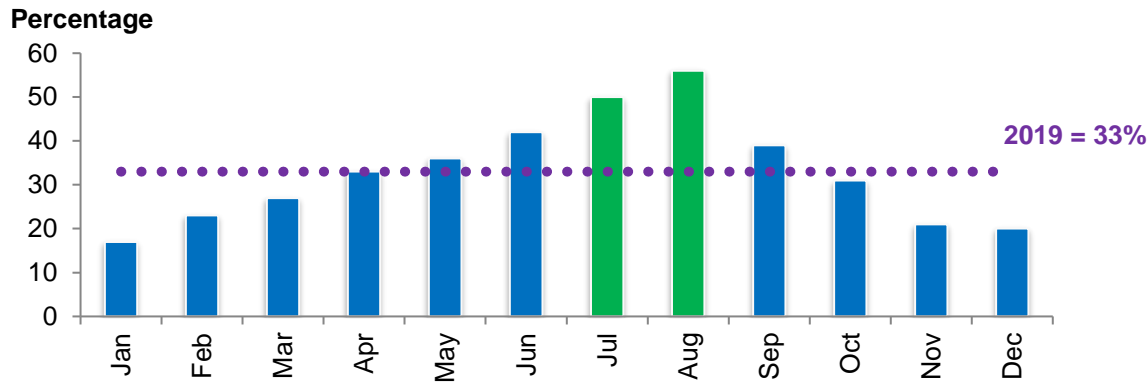
Figure 3: Estimated rolling twelve months guesthouse, bed & breakfasts and guest accommodation room and bed nights sold



Figures for 2019 show the number of rooms nights sold in Northern Ireland Guesthouse, Bed & Breakfasts and Guest Accommodation was an estimated 456,000, with an estimated 818,000 bed spaces sold over the same period. When looking at the guesthouse, bed & breakfasts and guest accommodation sector from 2014 the number of room nights sold has been volatile. Estimates would suggest that room nights sold during 2019 have seen an increase from 2014; however we cannot say that this increase has been statistically significant.

Guesthouse, bed & breakfasts and guest accommodation occupancy rates

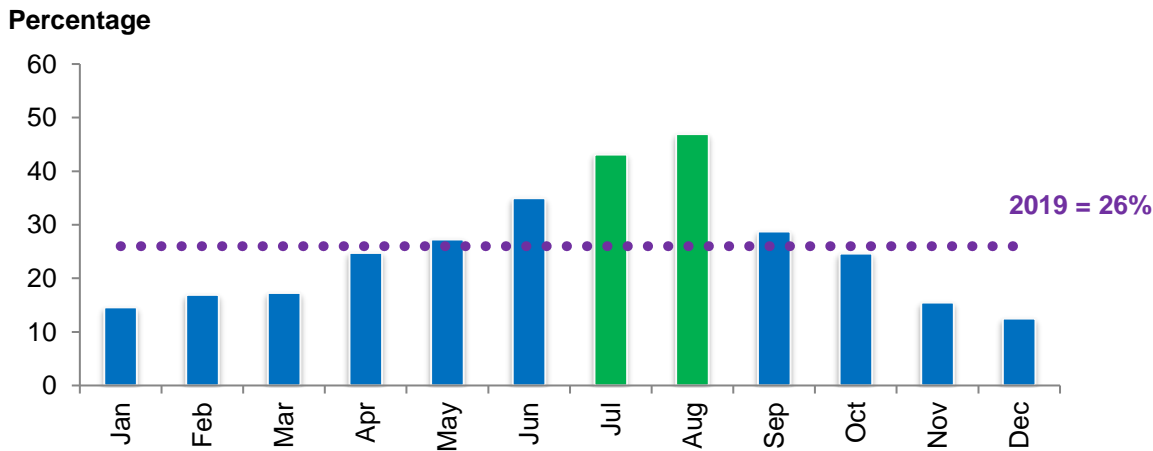
Figure 4: NI guesthouse, bed & breakfasts and guest accommodation room occupancy by month 2019



During January to December 2019 the room occupancy rate in Northern Ireland guesthouse, bed & breakfasts and guest accommodation was 33% while bed space occupancy was 26%.

Room and bed-space occupancy rates vary from month to month. Guesthouse, bed & breakfasts and guest accommodation monthly room occupancy during 2019 was highest in the months of July and August (50% and 56% respectively). Bed space occupancy was also highest in July and August (43% and 47% respectively).

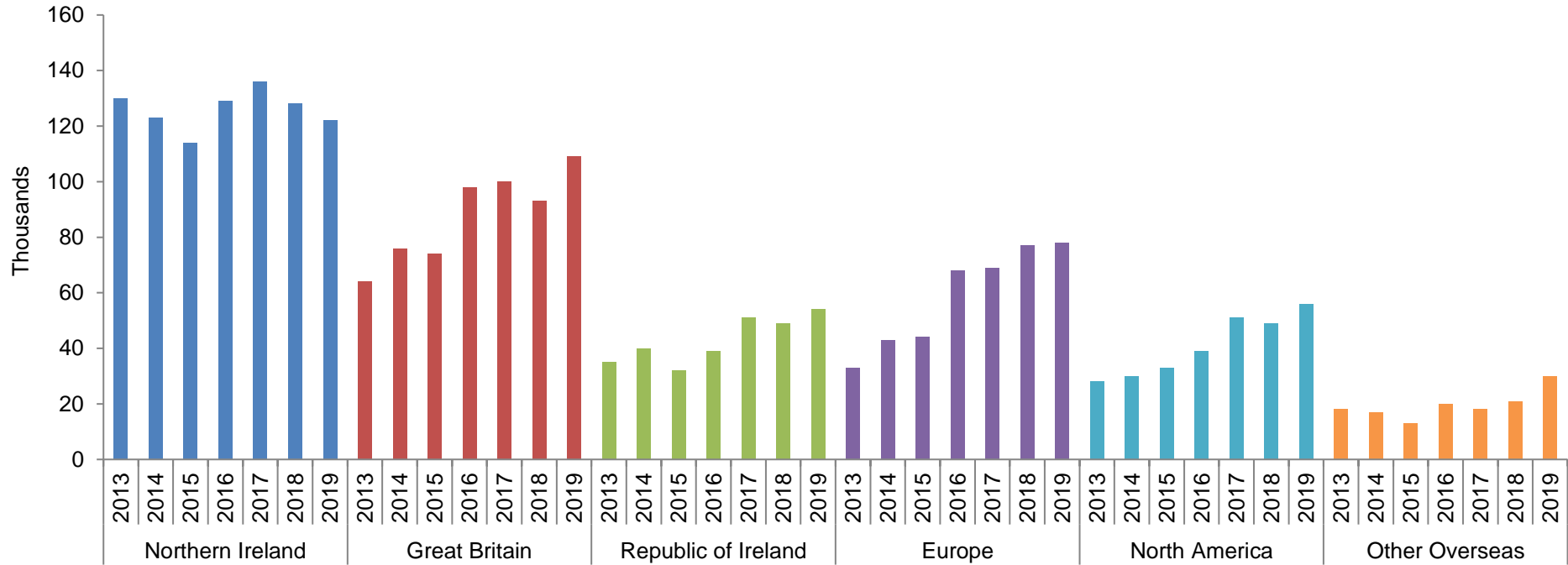
Figure 5: NI guesthouse, bed & breakfasts and guest accommodation bed space occupancy by month 2019



January saw the lowest estimated monthly occupancy rates of 17% room occupancy and December saw the lowest bed space occupancy rates at 12%.

Arrivals and guests

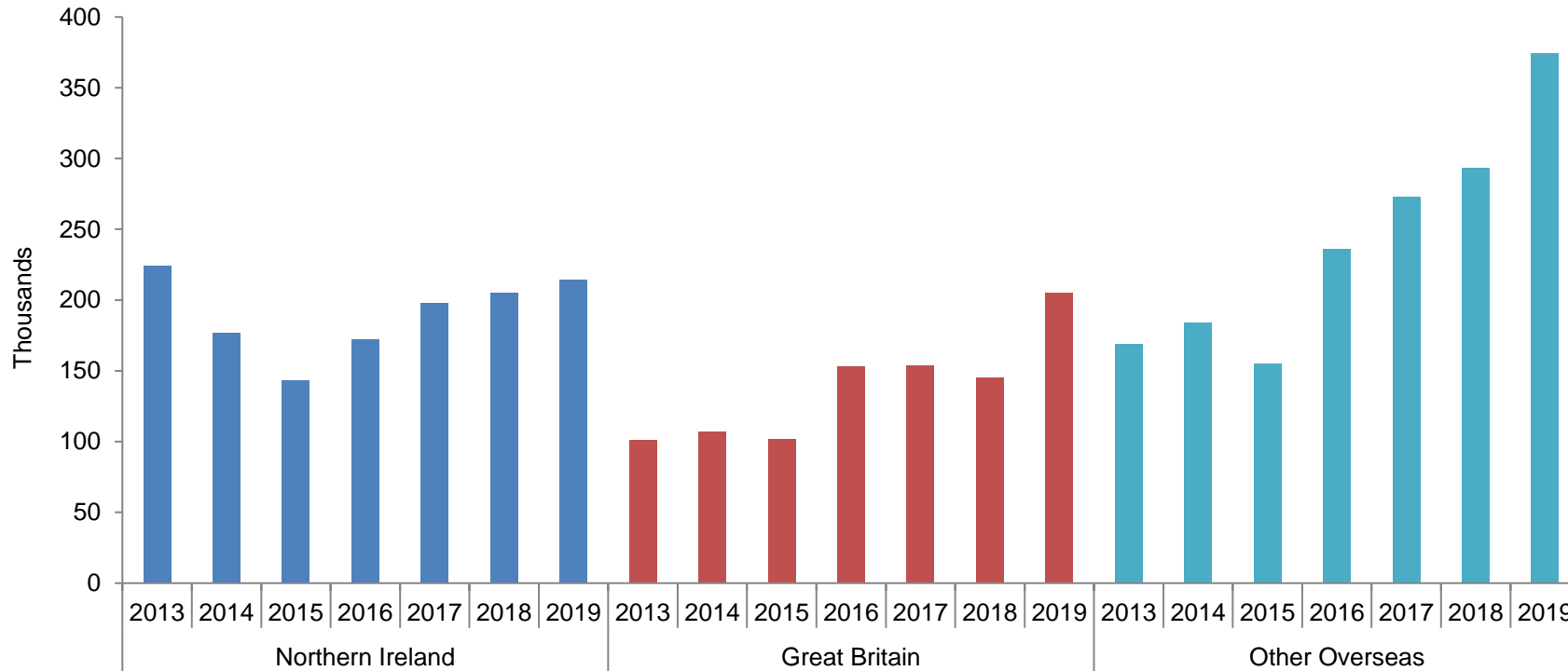
Figure 6: Arrivals to Northern Ireland guesthouse, bed & breakfasts and guest accommodation 2013 – 2019



It is estimated that there were 450,000 arrivals to guesthouse, bed & breakfasts and guest accommodation during 2019.

There were an estimated 122,000 thousand arrivals from Northern Ireland during 2019, accounting for over a quarter of the total arrivals for the year (27%). Arrivals from outside Northern Ireland in 2019 were an estimated 326,000 (73%), an increase from 290,000 in 2018.

Figure 7: Guests to Northern Ireland guesthouse, bed & breakfasts and guest accommodation 2013 – 2019

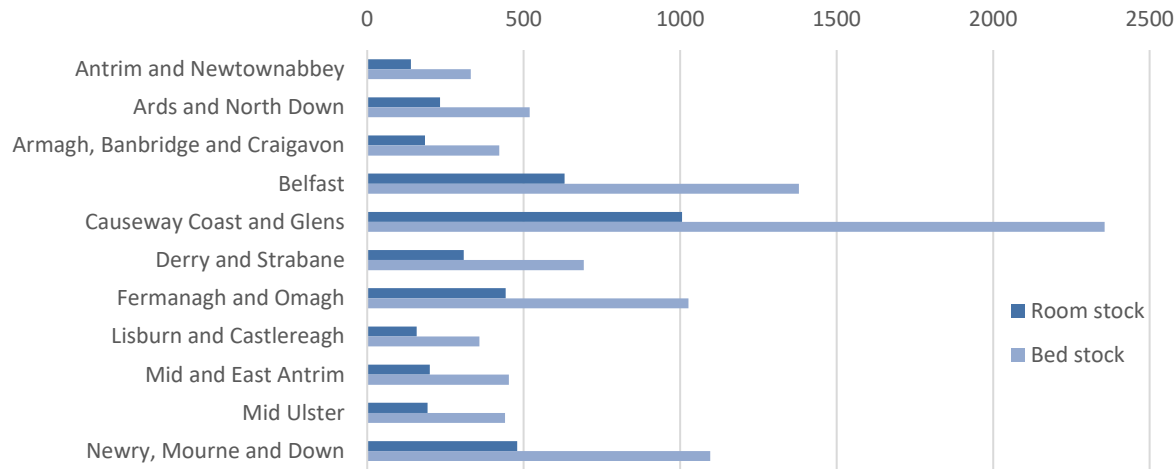


During 2019 there were an estimated 793,000 guests staying in Northern Ireland guesthouse, bed & breakfasts and guest accommodation, an increase from an estimated 644,000 in 2018.

An estimated 579,000 guests were from outside Northern Ireland (73%).

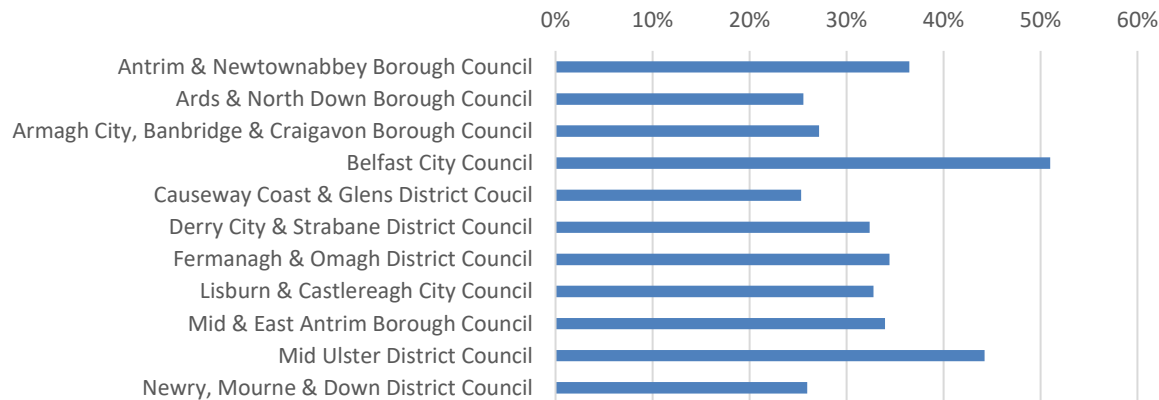
Stock levels and occupancy rates by Local Government District

Figure 8: Guesthouse, bed & breakfasts and guest accommodation room stock 2019 by Local Government District



Causeway Coast and Glens accounted for the highest share of accommodation rooms with 25% of the rooms stock in Northern Ireland. Belfast accounted for the second highest share of room stock (16%) with Newry, Mourne and Down third (12%).

Figure 9: Accommodation room occupancy 2019 by Local Government District



Belfast had the highest room occupancy during 2019 (51%). Mid Ulster had the second highest occupancy rates during 2019 (44%) followed by Antrim and Newtownabbey (36%)

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 guesthouse, bed & breakfasts 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 guesthouse, 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 guesthouse, 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 = (Total number of bed-spaces occupied / 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 = (Total number of rooms occupied / 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

Ards & North Down 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

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](#).

Copyright

This publication is Crown copyright and may be reproduced free of charge in any format or medium. Any material used must be acknowledged, and the title of the publication specified.