

Northern Ireland Annual Hotel Occupancy Survey 2019

Published 22 October 2020

The key points are:

- there were an estimated 2.4 million rooms sold in Northern Ireland hotels during 2019 compared with an estimated 2.2 million in 2018;
- hotel stock increased between 2018 and 2019, with an increase of 4% in rooms available and bed-spaces available;
- during 2019 room occupancy in Northern Ireland hotels was an estimated 67% compared with an estimated 70% in the previous year. Bed-space occupancy was an estimated 54% showing little change from 53% in 2018;
- the figures point towards a positive year for hotels in terms of total rooms sold. Estimates suggest 2019 saw the highest number of hotel rooms sold on record.

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Theme: People and Places

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National Statistics Status

National Statistics status means that our statistics meet the highest standards of trustworthiness, quality and public value, and it is our responsibility to maintain compliance with these standards.

These statistics were designated as National Statistics in May 2017 following a full assessment against the Code of Practice. Since the assessment by the UK Statistics Authority, we have continued to comply with the Code of Practice for Statistics, and have also made the following improvements:

- Made the survey more accessible to respondents by improving the flow and presentation of questions, helping reduce the burden on respondents and maintain response rates.
- Increased accessibility by publishing data in open source format for all statistics.
- Increasing awareness of statistics by allowing users to sign up to a mailing list that means they are informed of any new statistical releases.
- Improved response rates through using NI Direct to help chase up responses.



Introduction

This report provides statistics on hotel occupancy rates in Northern Ireland during 2019. As occupancy statistics are survey based estimates the statistics provided are an indicator of how hotels are performing.

What you can say....

Whilst we cannot say there has been a statistically significant change in hotel rooms sold year on year, when looking at the full picture, sources point towards a general upward trend since 2013

What you cannot say....

There was a definitive increase of 8% in rooms sold in hotel between 2018 and 2019 to the highest on record.

This report should be read in conjunction with other tourism statistics reports for a full picture. When looking at the full picture, sources point toward a general upward trend in hotel rooms sold since 2013. A full picture of all tourism activity can be found in the [Northern Ireland Annual Tourism Statistics Publication](#).

Hotel 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 Hotel stock 2013 - 2019

| Year | Hotels | Rooms | Bed Spaces |
|-------------------------|-----------|-----------|------------|
| 2013 | 138 | 7,893 | 17,661 |
| 2014 | 134 | 7,809 | 17,470 |
| 2015 | 135 | 7,822 | 17,545 |
| 2016 | 137 | 7,916 | 17,739 |
| 2017 | 138 | 8,121 | 18,135 |
| 2018 | 141 | 9,221 | 20,603 |
| 2019 | 145 | 9,592 | 21,498 |
| Change 18/19 (%) | 3% | 4% | 4% |

As of the end of December 2019 there were a total of 145 hotels offering accommodation in Northern Ireland.

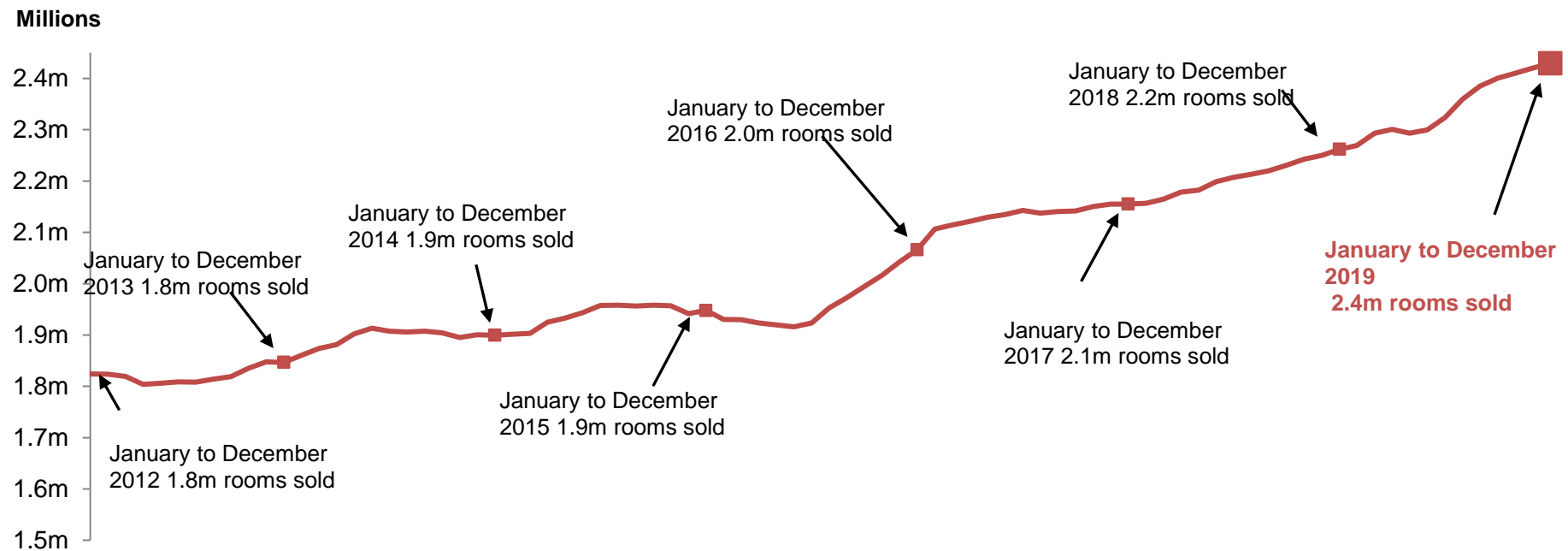
The number of hotels increased by 3% when compared to 2018. The number of hotel rooms and bed spaces available also increased over this time, both by 4%.

Hotel room nights sold

Figures for 2019 show the estimated number of hotel room nights sold was 2.38 million accounting for an estimated 4.17 million bed spaces sold. According to the estimates there were an additional 167,000 hotel room nights sold in 2019 compared to 2018.

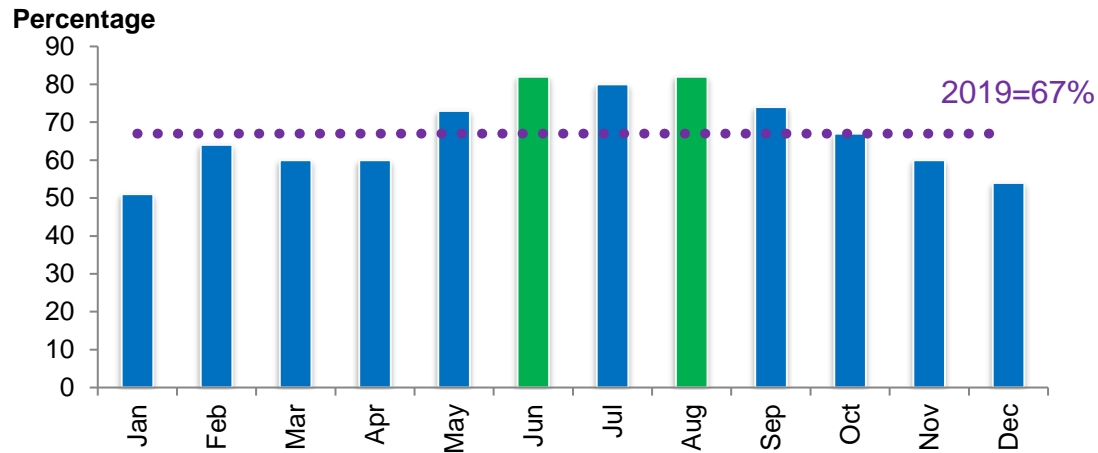
See Figure 2 for the rolling twelve month trend in hotel room nights sold from January 2013. The trend suggests an increase over the period in the estimated number of rooms sold in Northern Ireland hotels.

Figure 2: Estimated rolling twelve month hotel room and bed nights sold 2013-2019



Hotel Occupancy

Figure 3: Northern Ireland Hotel room occupancy by month 2019

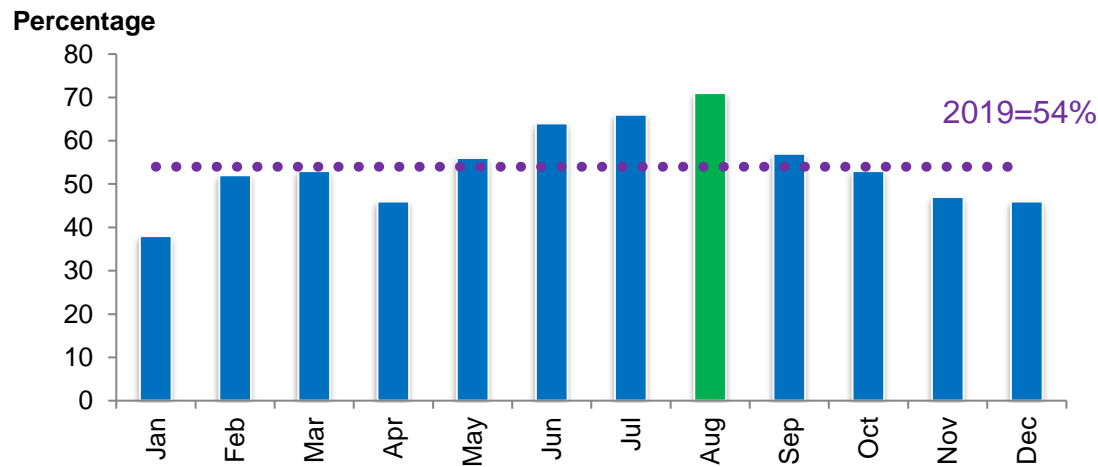


During 2019 room occupancy rates in Northern Ireland hotels were estimated to be 67%. The estimated bed space occupancy rates were 54%.

Room and bed-space occupancy rates vary from month to month. Hotel monthly room occupancy during 2019 was highest in the months of June and August (82%)

January saw the lowest estimated occupancy rates with 51% rooms occupied and 38% bed spaces occupied.

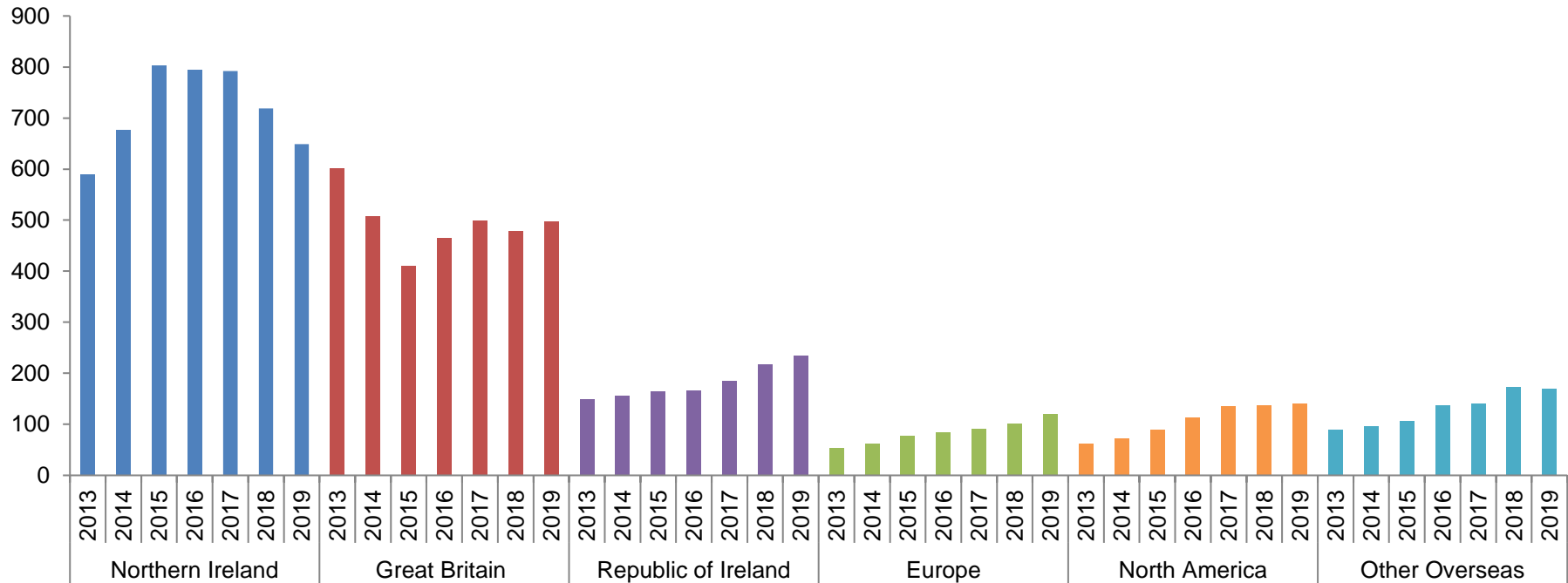
Figure 4: Northern Ireland Hotel bed space occupancy by month 2019



Arrivals and Guests

Figure 5: Arrivals to Northern Ireland hotels 2013 – 2019

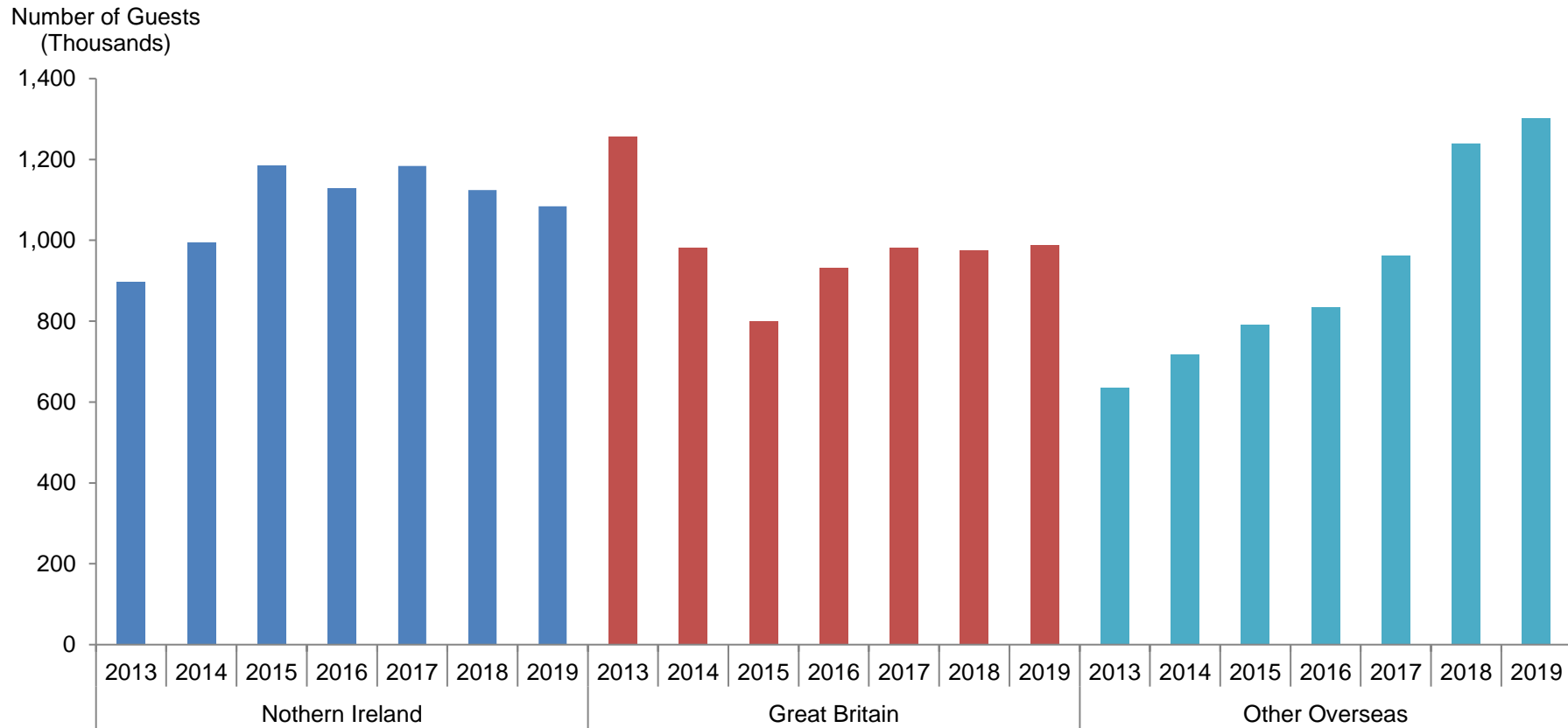
Number of Arrivals
(Thousands)



It is estimated that there were 1.8 million arrivals checked into Northern Ireland hotels during 2019. Northern Ireland residents made up over a third of the arrivals at hotels (36% or 649,000). Another 28% checked in from Great Britain (498,000). (Figure 5).

When looking at the estimated total number of arrivals to Northern Ireland hotels from 2013 onward the figures suggest an upward trend, rising from an estimated 1.6 million in 2013 to 1.8 million in 2019.

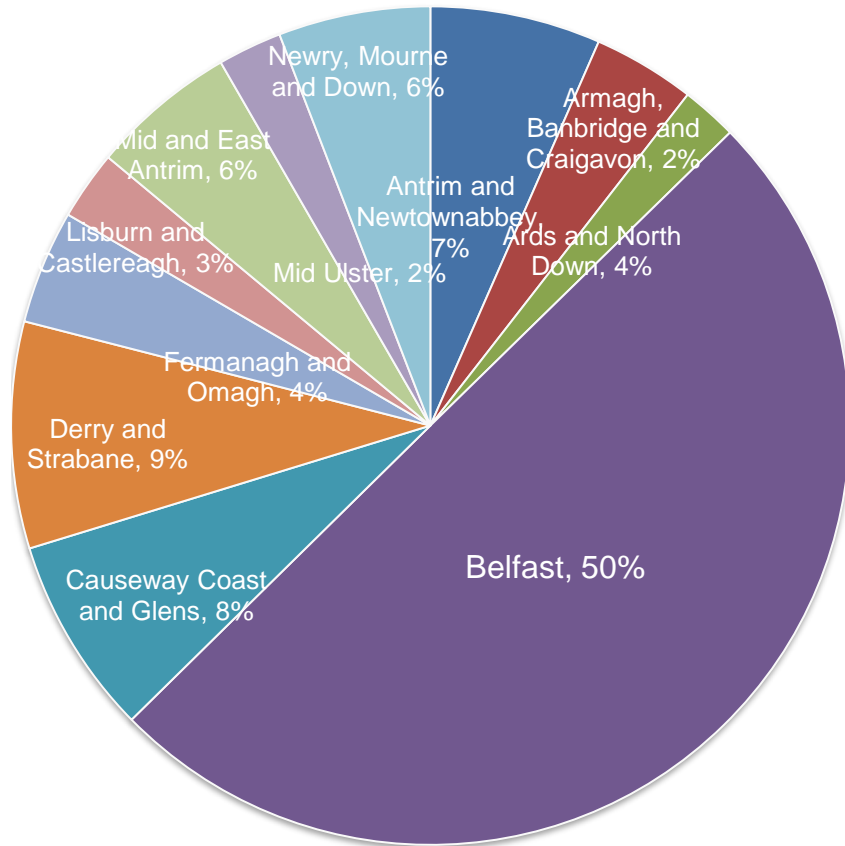
Figure 6: Guests to Northern Ireland Hotels 2013 – 2019



During 2019 there were an estimated 3.4 million guests staying in Northern Ireland hotels. Around 68% of hotel guests were from outside Northern Ireland (2.3 million).

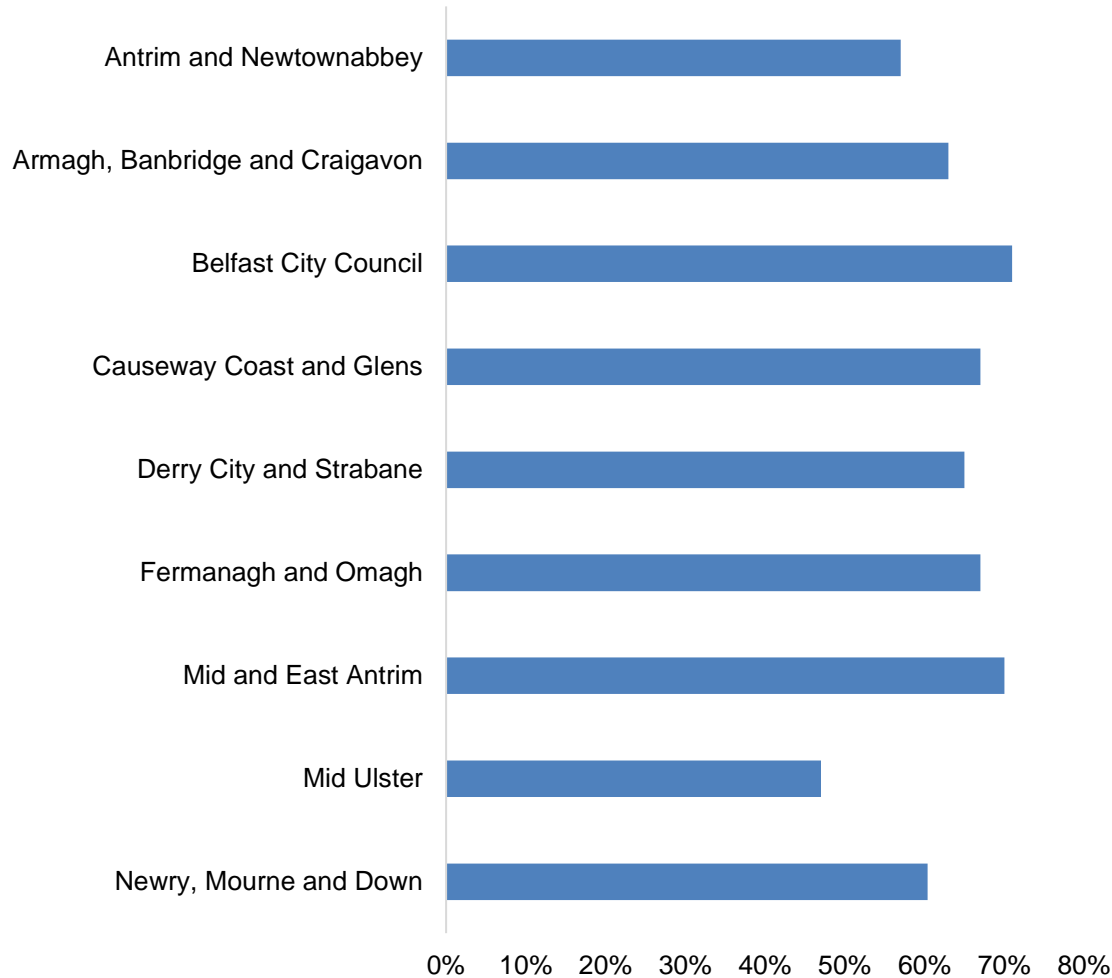
Stock levels and occupancy rates by Local Government District

Figure 7: Hotel room stock 2019 by Local Government District



Belfast accounted for the highest share of accommodation rooms during 2019 with 50% of the hotel room stock in Northern Ireland. Derry City & Strabane and Causeway Coast & Glens accounted for the second and third highest hotel room stock both with 9% and 8% respectively.

Figure 8: Hotel room occupancy 2019 by Local Government District*



While Northern Ireland overall had a room occupancy rate of 67% in 2019, this varied slightly by geographical area. Belfast City Council had the highest room occupancy (71%). This is particularly important when considering that it accounted for 50% of all rooms available in NI.

*The sample sizes for Lisburn and Castlereagh City Council and Ards and North Down Borough Council were not large enough to provide a reliable estimate for occupancy rates in 2019.

Background Notes

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 survey uses a census of all hotels in Northern Ireland. Each month, all hotels are invited to participate in the occupancy survey by completing a questionnaire. The survey is issued both by post and electronically by email. Responses are also accepted by telephone in an effort to boost response rates.

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 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
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

Further information on the survey methodology can be found at this [link](#).

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 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 the data quality of tourism statistics can be found at [Data Quality Report](#).

Information on the data quality of administrative sources can be found at this [link](#).

A revision was made to improve the weighting of the 2018 data which resulted in approximately a 5% change in the rooms and bed spaces sold during this year. The overall “story” has not changed and the figures have been updated in this report and accompanying tables.

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