

## Northern Ireland Annual Guesthouse, Bed & Breakfast and Guest Accommodation Occupancy Survey 2018

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### The key points are:

- during 2018 there were an estimated 454,000 rooms sold in guesthouse, bed & breakfasts and guest accommodation, compared with an estimated 423,000 in 2017;
- during 2018 there was a significant increase in stock levels with 13% more rooms and bed spaces available compared to 2017;
- during 2018 room occupancy for guesthouse, bed & breakfasts and guest accommodation was an estimated 37% while estimated bed-space occupancy was an estimated 28%;
- the figures point towards a positive year for guesthouse, bed & breakfasts and guest accommodation. Estimates suggest 2018 saw the highest **guesthouse**, bed & breakfasts and guest accommodation rooms sold on record.

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## Introduction

This report provides statistics on guesthouse, bed & breakfasts and guest accommodation occupancy rates in Northern Ireland during 2018. 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 a increase since 2013.**

### What you cannot say....

**During January to December 2018 there was a no change in Northern Ireland guesthouses, bed & breakfasts and guest accommodation room occupancy rates from 2017**

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.

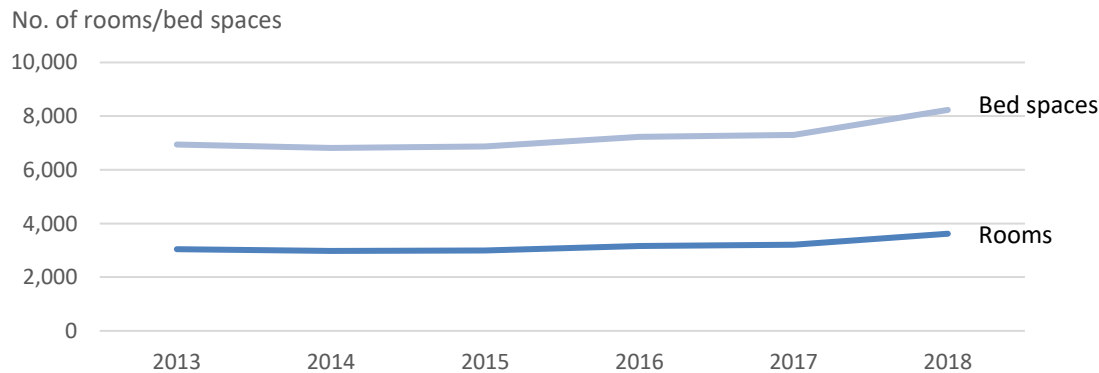
**Table 1: Northern Ireland guesthouse, bed & breakfasts and guest accommodation (GHBBGA) stock 2013-2018**

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
<b>Change 17/18</b>	<b>9%</b>	<b>13%</b>	<b>13%</b>

As of the end of December 2018 there were a total of 832 guesthouse, bed & breakfasts and guest accommodation offering accommodation in Northern Ireland.

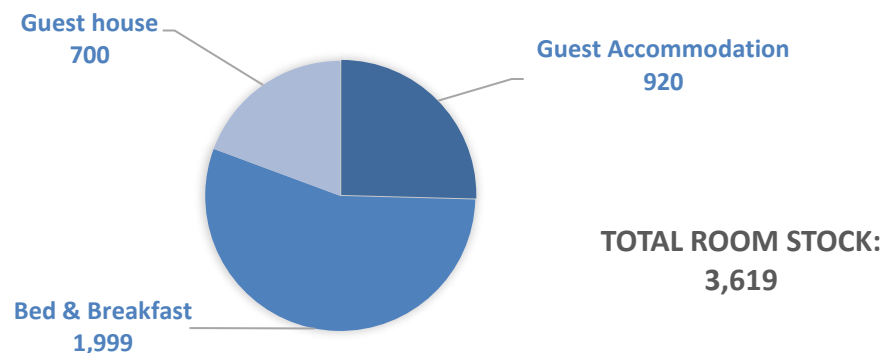
This consisted of 80 guesthouse, 148 guest accommodation and 604 bed & breakfasts.

**Figure 1: Northern Ireland guesthouse, bed & breakfasts and guest accommodation (GHBBGA) stock 2013-2018**



The number of establishments increased by 9% when compared to 2017, while the number of available rooms and bed spaces both increased by 13%.

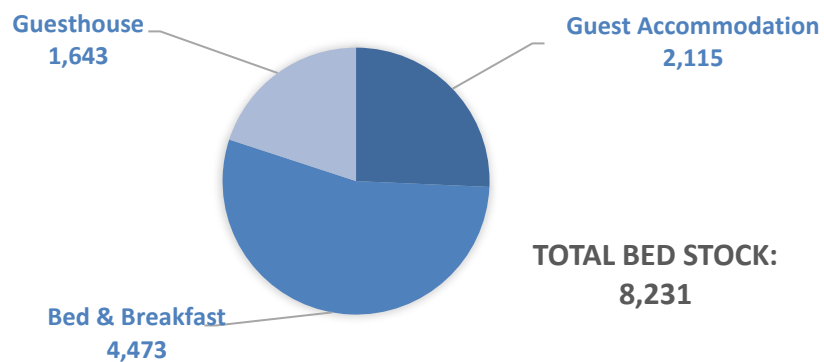
**Figure 2: Northern Ireland guesthouse, bed & breakfasts and guest accommodation room stock 2018**



The room and bed stock available by accommodation type can be seen in figures 2 and 3.

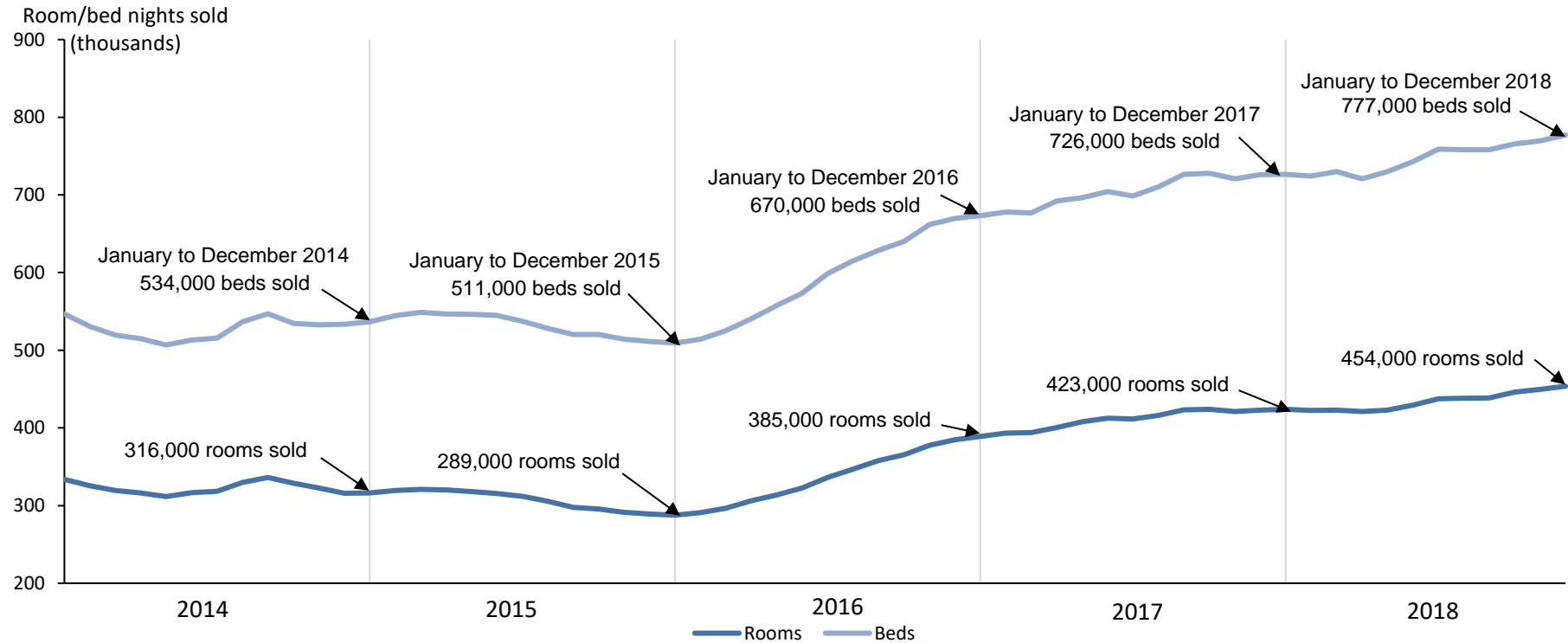
Bed and breakfasts provide the majority of this stock within the guesthouse, bed & breakfasts and guest accommodation sector with 1,999 rooms (55%) and 4,473 bed spaces (54%) available.

**Figure 3: Northern Ireland guesthouse, bed & breakfasts and guest accommodation bed space stock 2018**



## Guesthouse, bed & breakfasts and guest accommodation occupancy nights sold

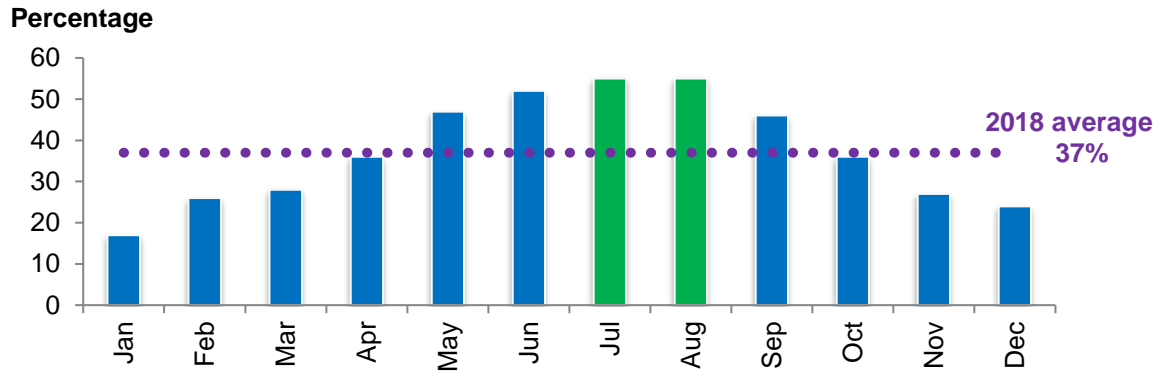
**Figure 4: Estimated rolling twelve months guesthouse, bed & breakfasts and guest accommodation room and bed nights sold (non zero axis)**



Figures for 2018 show the number of rooms nights sold in Northern Ireland Guesthouse, Bed & Breakfasts and Guest Accommodation was an estimated 454,000, with an estimated 777,000 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 2018 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

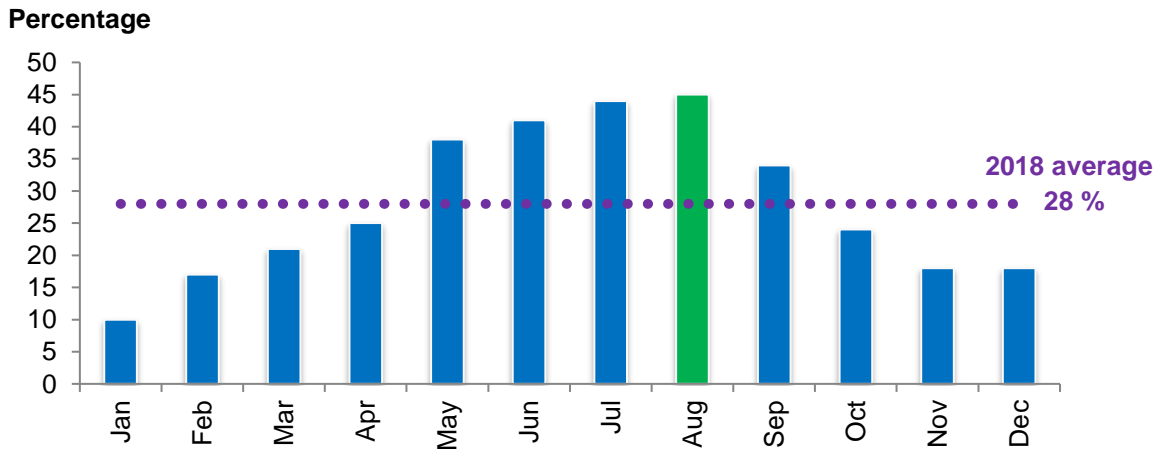
**Figure 5: NI guesthouse, bed & breakfasts and guest accommodation room occupancy by month 2018**



During January to December 2018 the room occupancy rate in Northern Ireland guesthouse, bed & breakfasts and guest accommodation was 37% while bed space occupancy was 28%.

Room and bed-space occupancy rates vary from month to month. Guesthouse, bed & breakfasts and guest accommodation monthly room occupancy during 2018 was highest in the months of July and August (55%). Bed space occupancy was highest in August (45%).

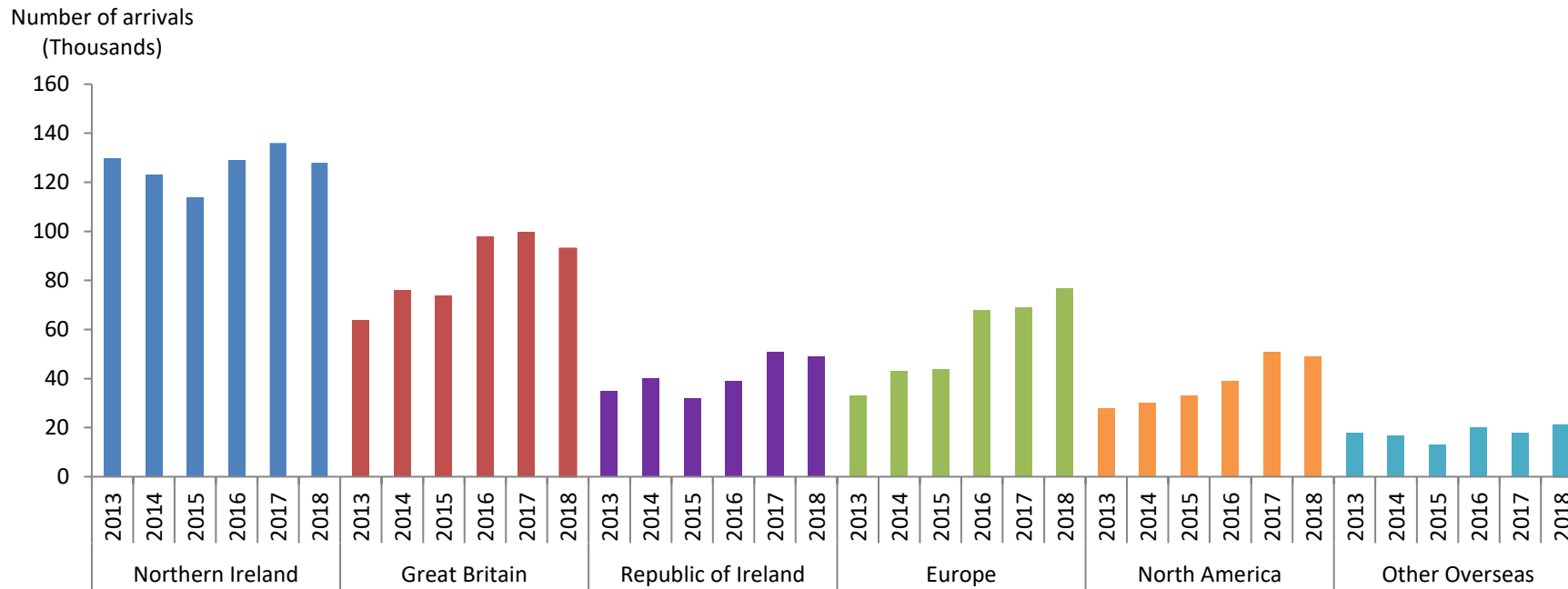
**Figure 6: NI guesthouse, bed & breakfasts and guest accommodation bed space occupancy by month 2018**



January saw the lowest estimated monthly occupancy rates of 17% room occupancy and 10% bed space occupancy.

## Arrivals and guests

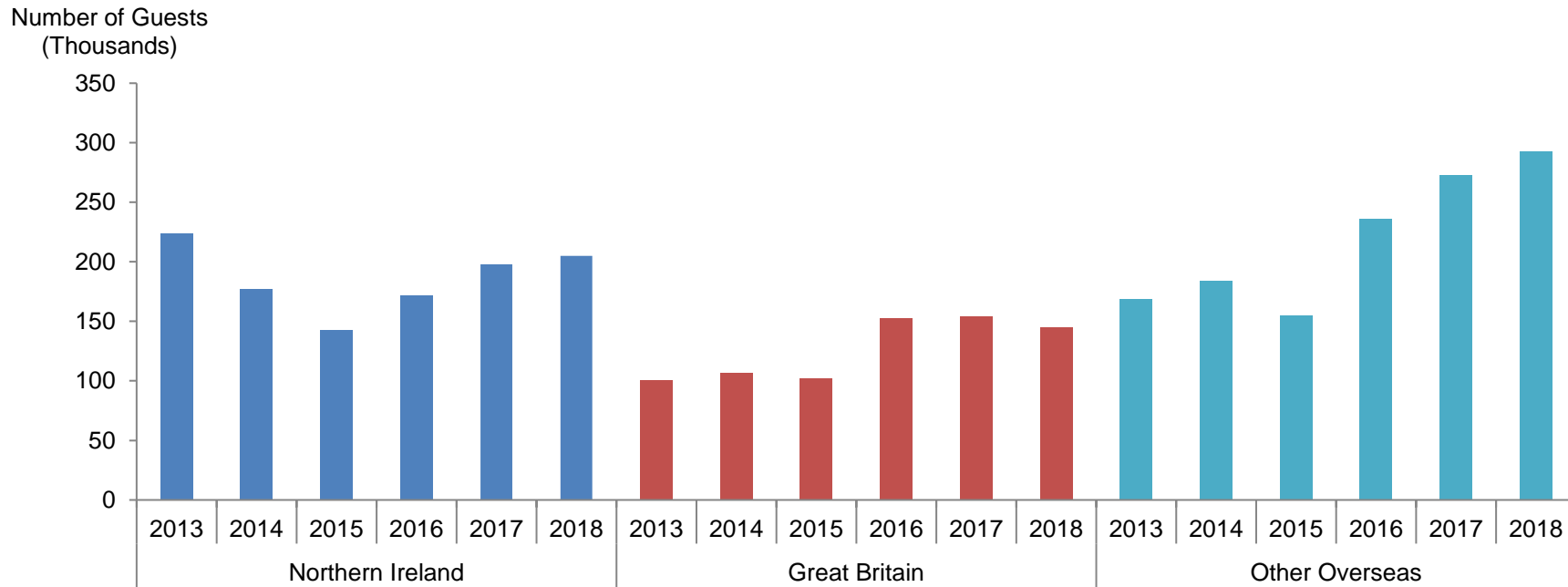
**Figure 7: Arrivals to Northern Ireland guesthouse, bed & breakfasts and guest accommodation 2013 - 2018**



It is estimated that there were 418,000 arrivals to guesthouse, bed & breakfasts and guest accommodation during 2018.

There were an estimated 128,000 thousand arrivals from Northern Ireland during 2018, accounting for almost a third of the total arrivals for the year (31%). Arrivals from outside Northern Ireland in 2018 were an estimated 290,000 (69%).

**Figure 8: Guests to Northern Ireland guesthouse, bed & breakfasts and guest accommodation 2013 - 2018**



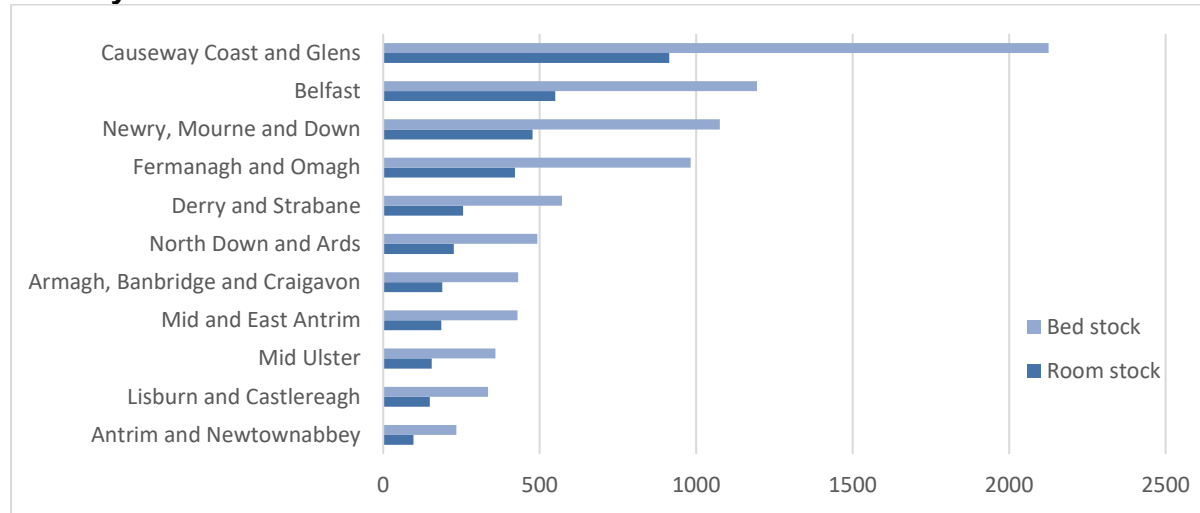
During 2018 there were an estimated 644,000 guests staying in Northern Ireland guesthouse, bed & breakfasts and guest accommodation.

An estimated 439,000 guests were from outside Northern Ireland (68%).



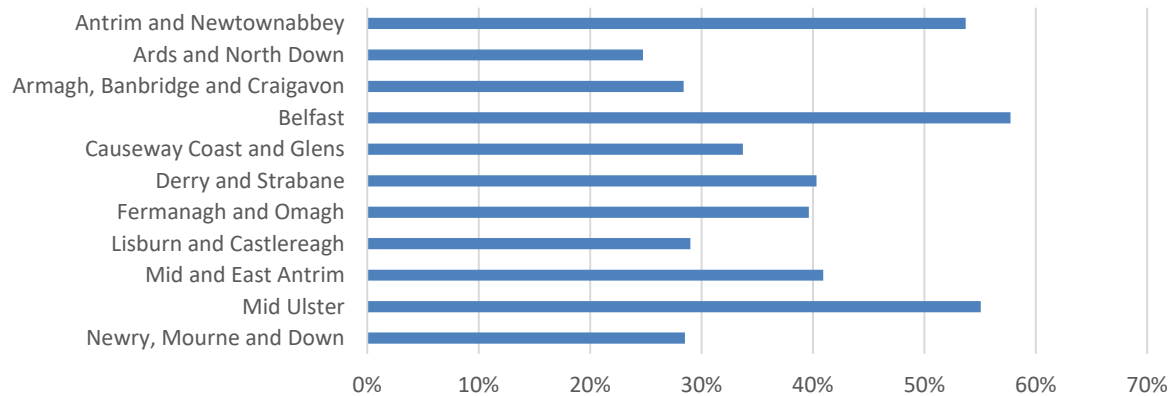
## Stock levels and occupancy rates by Local Government District

**Figure 9: Guesthouse, bed & breakfasts and guest accommodation room stock 2018 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 (15%) with Newry, Mourne and Down third (13%).

**Figure 10: Accommodation room occupancy 2018 by Local Government District**



Belfast had the highest room occupancy during 2018 (58%). Mid Ulster had the second highest occupancy rates during 2018 (55%) followed by Antrim and Newtownabbey (54%)

## **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 =  $(\text{Total number of bed-spaces occupied} / \text{total number of bed-spaces available}) * 100$

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

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](mailto:tourismstatistics@nisra.gov.uk)

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

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