



Northern Ireland Annual Hotel Occupancy Survey 2018

Published 06 June 2019

The key points are:

- there were an estimated 2.21 million rooms sold in Northern Ireland hotels during 2018 compared with an estimated 2.11 million in 2017;
- hotel stock increased by 14% in terms of both rooms and beds available compared to 2017;
- during 2018 room occupancy in Northern Ireland hotels was an estimated 70% compared with an estimated 73% in 2017. Bed-space occupancy was an estimated 53% compared with an estimated 56% in 2017;
- the figures point towards a positive year for hotels in terms of total rooms sold. Estimates suggest 2018 saw the highest number of hotel rooms sold on record. The fall in the estimated occupancy rates was possibly due to the large increase in available rooms and beds in Northern Ireland hotels.

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Frequency: Annual
Coverage: Northern Ireland
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.



Introduction

This report provides statistics on hotel occupancy rates in Northern Ireland during 2018. 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....

During January to December 2018 there was definite decrease in Northern Ireland hotel room occupancy rates from 73% during 2017 to 70% in 2018

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.

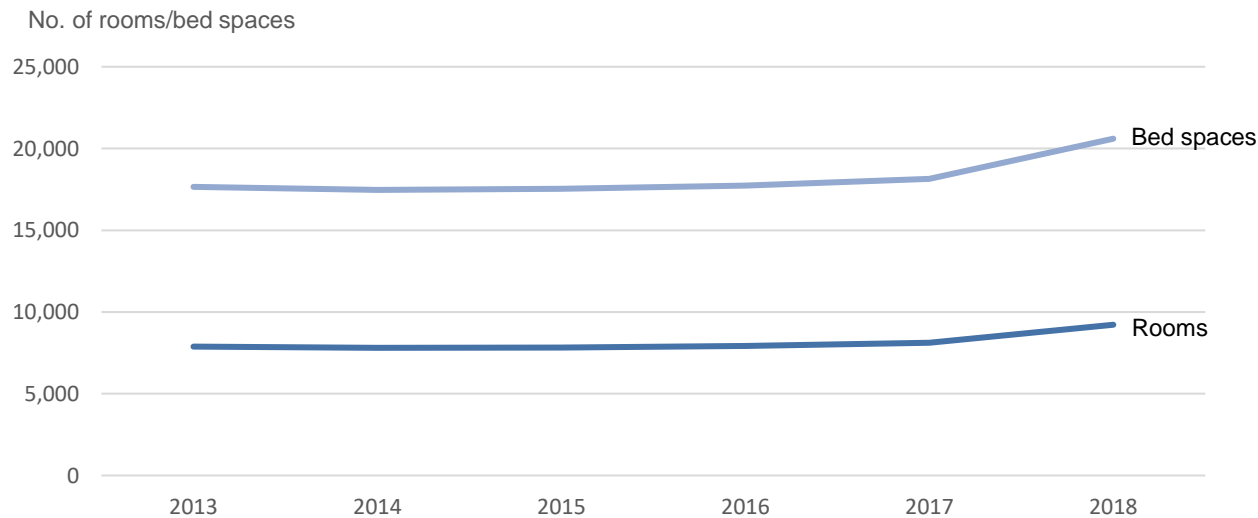
Table 1: Northern Ireland Hotel stock 2013 - 2018

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
Change 17/18	2%	14%	14%

As of the end of December 2018 there were a total of 141 hotels offering accommodation in Northern Ireland.

The number of hotels increased by 2% when compared to 2017. The number of hotel rooms and beds both increased by 14% over the same period.

Figure 1: Hotel room and bed stock 2013-2018

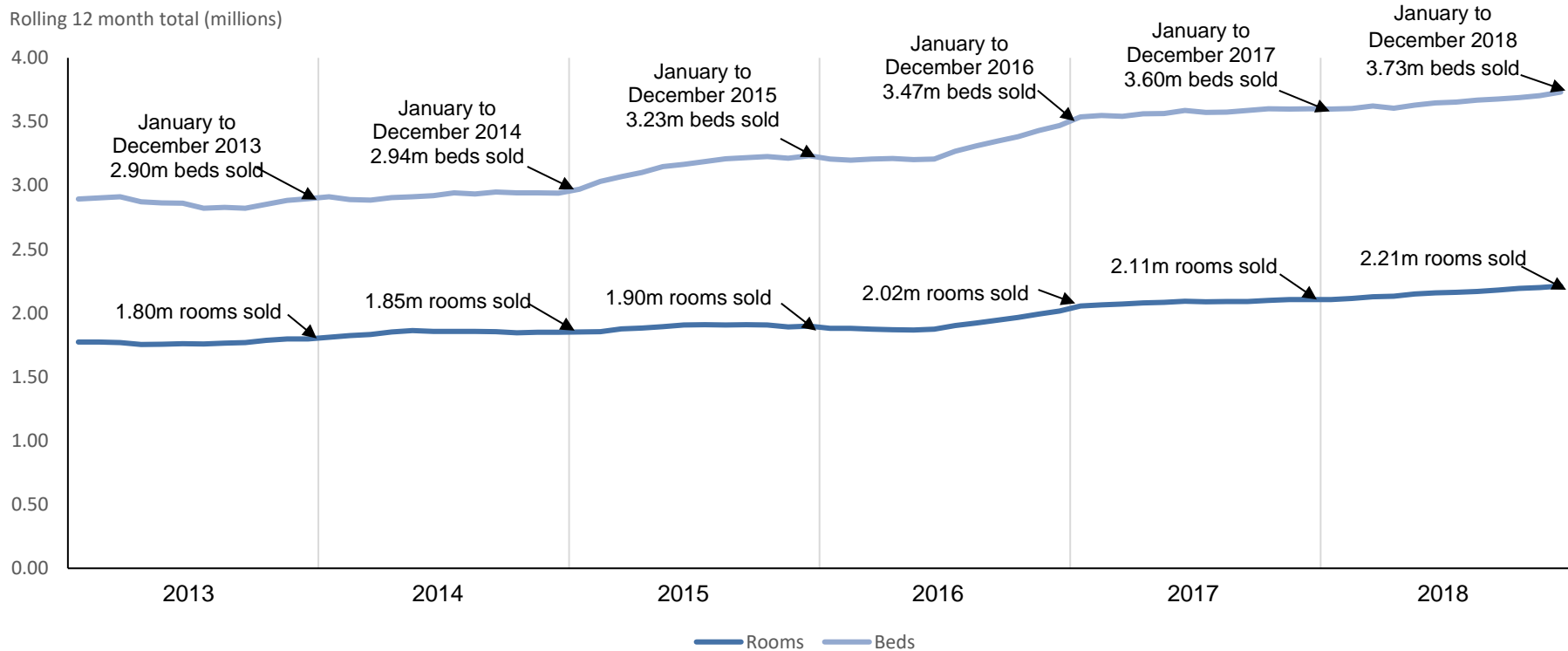


Hotel room nights sold

Figures for 2018 show the estimated number of hotel room nights sold was 2.21 million accounting for an estimated 3.73 million bed spaces sold. According to the estimates there were an additional 107,000 hotel room nights sold in 2018 compared to 2017.

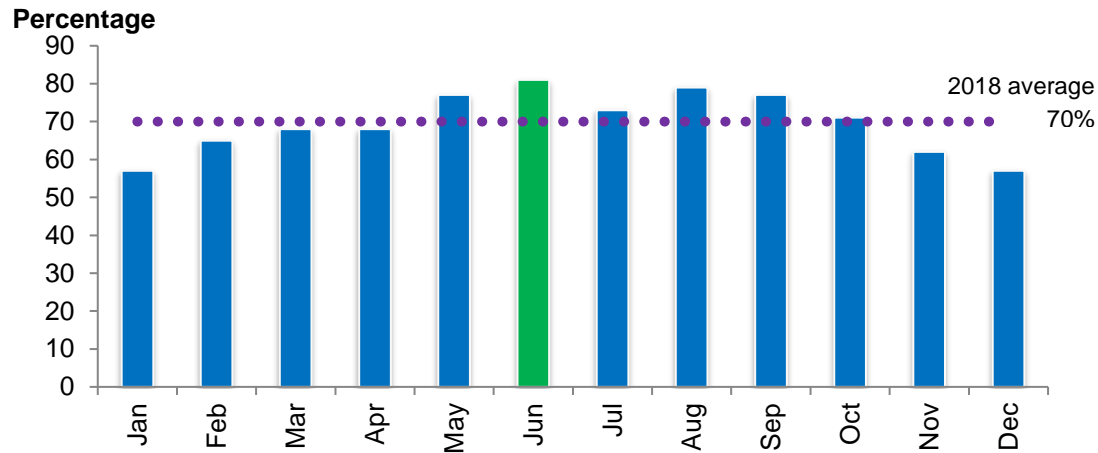
See Figure 2 for the rolling twelve month trend in hotel room nights sold from January 2013. The trend suggests an increase over the period in the estimated number of rooms sold in Northern Ireland hotels.

Figure 2: Estimated rolling twelve month hotel room and bed nights sold December 2013- December 2018



Hotel Occupancy

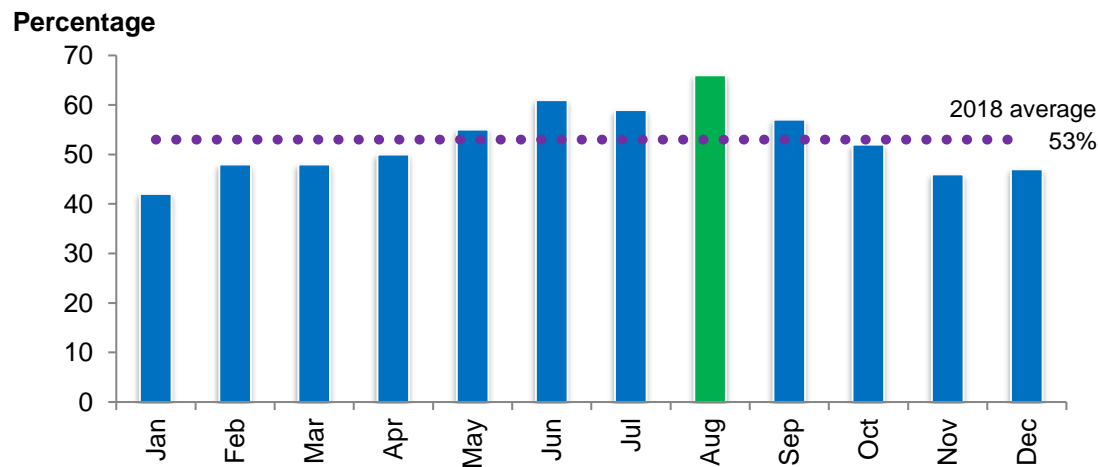
Figure 3: Northern Ireland Hotel room occupancy by month 2018



During January – December 2018 average room occupancy rates in Northern Ireland hotels were estimated to be 70%. The estimated average bed space occupancy rates were 53%.

Room and bed-space occupancy rates vary from month to month. Hotel monthly room occupancy during 2018 was highest in the month of June (81%) with the highest bed-space occupancy rates in August (66%).

Figure 4: Northern Ireland Hotel bed space occupancy by month 2018

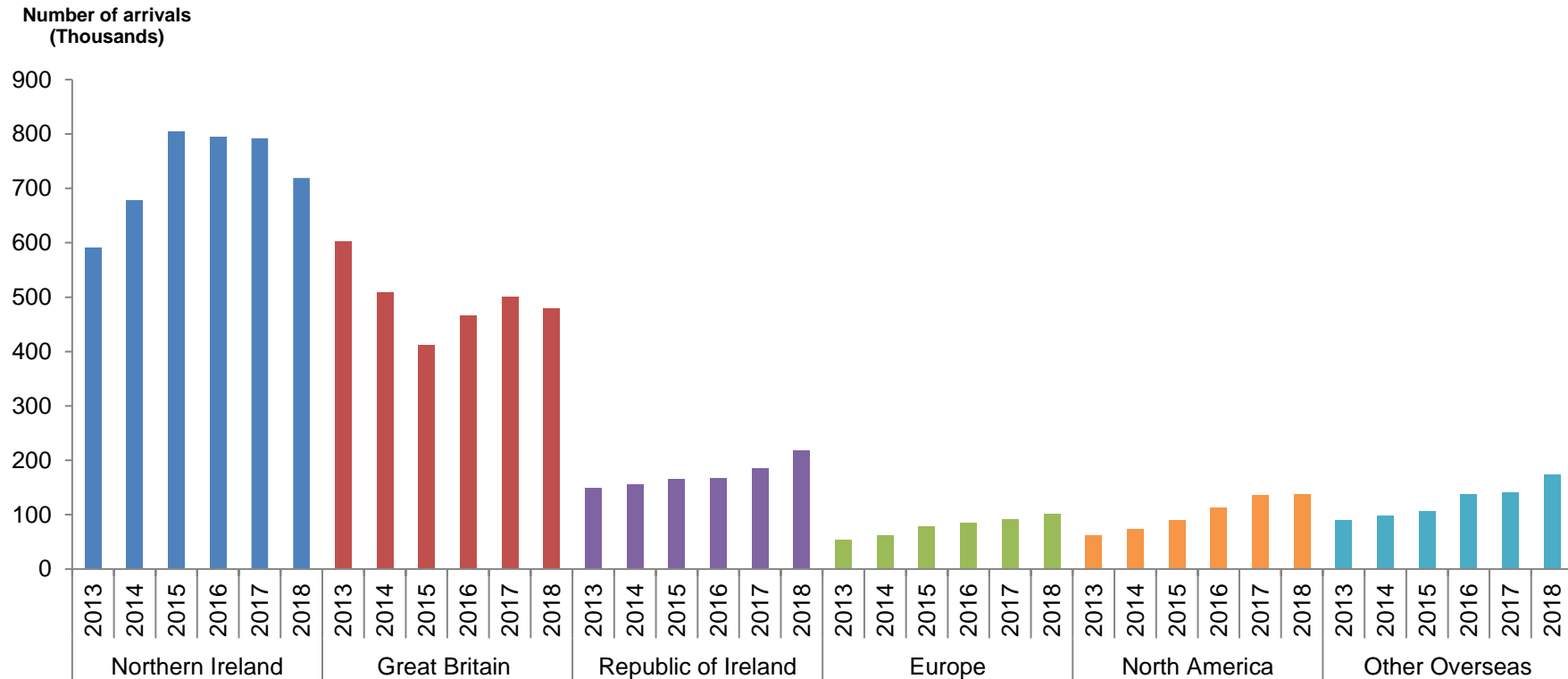


January and December saw the lowest estimated monthly room occupancy rates of 57% room occupancy.

January saw the lowest bed-space occupancy rate at an estimated 42%

Arrivals and Guests

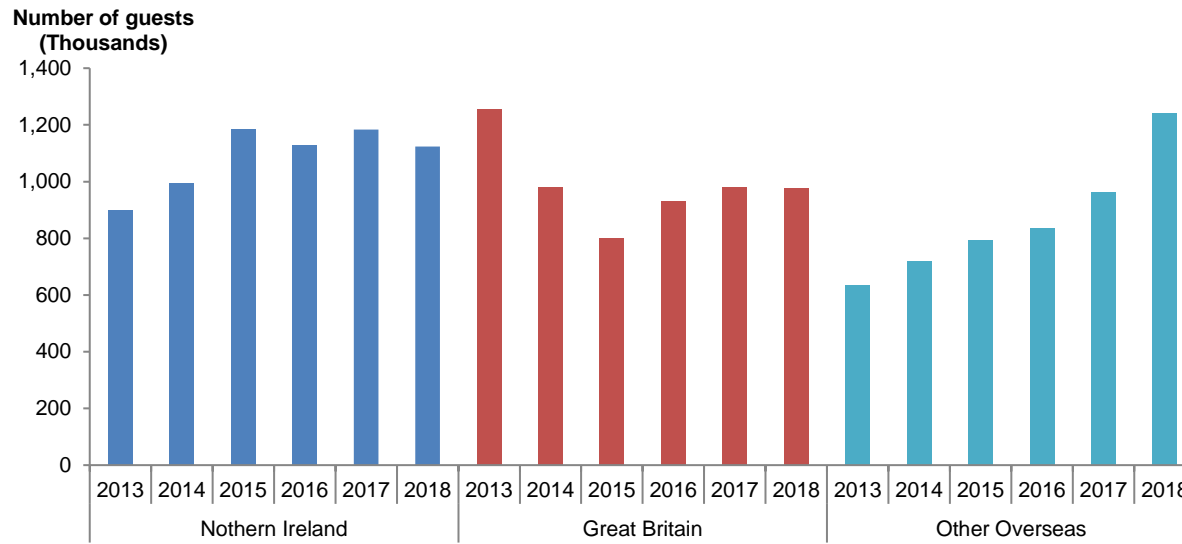
Figure 5: Arrivals to Northern Ireland hotels 2013 – 2018



It is estimated that there were 1.83 million arrivals to Northern Ireland hotels during 2018. There were an estimated 719,000 arrivals from Northern Ireland residents, accounting for under half (40%), of the total arrivals for the year. Arrivals from Great Britain made up just over a quarter (26%) of all arrivals with around 479,000 arrivals during 2018 (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 1.55 million in 2013 to 1.83 million in 2018

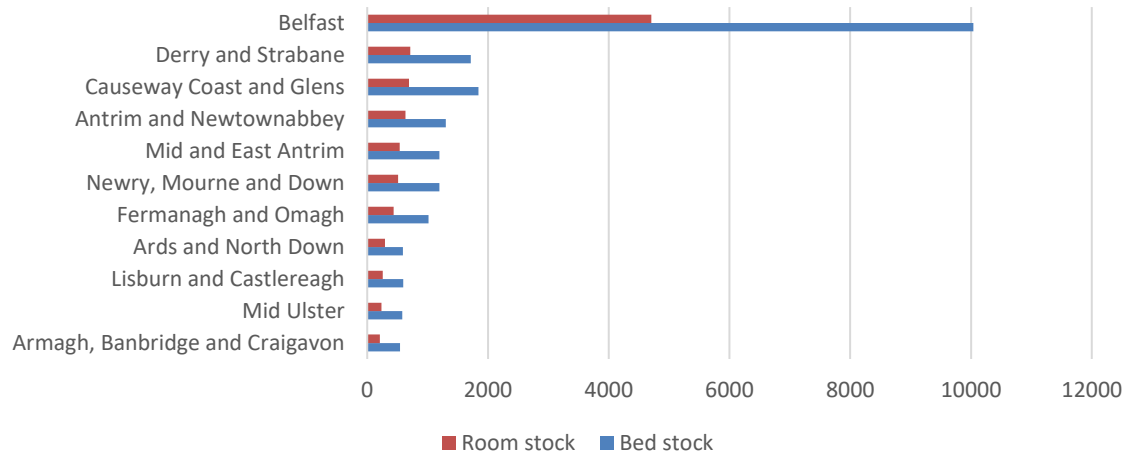
Figure 6: Guests to Northern Ireland Hotels 2013 – 2018



During 2018 there were an estimated 3.34 million guests staying in Northern Ireland hotels. Around 66% of hotel guests were from outside Northern Ireland (2.21 million).

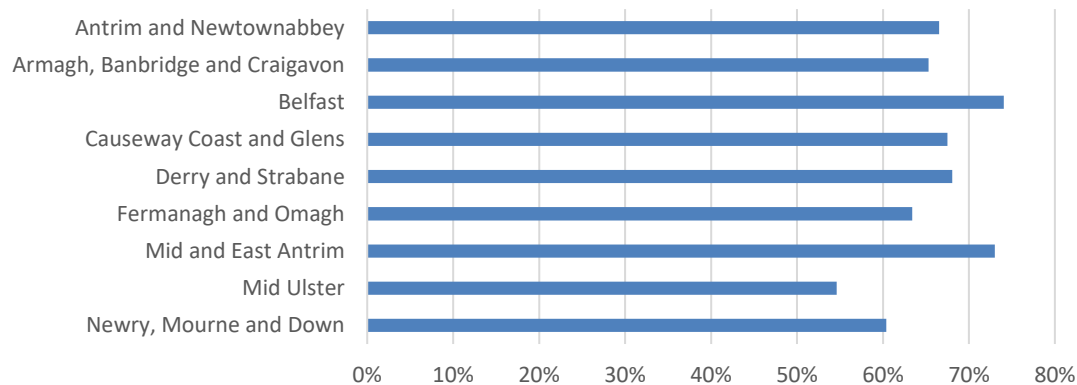
Stock levels and occupancy rates by Local Government District

Figure 7: Hotel room stock 2018 by Local Government District



Belfast accounted for the highest share of accommodation rooms during 2018 with 51% 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 7.7% and 7.5% respectively.

Figure 8: Hotel room occupancy 2018 by Local Government District*



Belfast had the highest room occupancy during 2018 (74%). Mid & East Antrim experienced the second highest room occupancy rates during 2018 (74%) followed by Derry and Strabane (68%).

*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 2018.

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](#).

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