

13 May 2014

(Revised 05 June 2014)

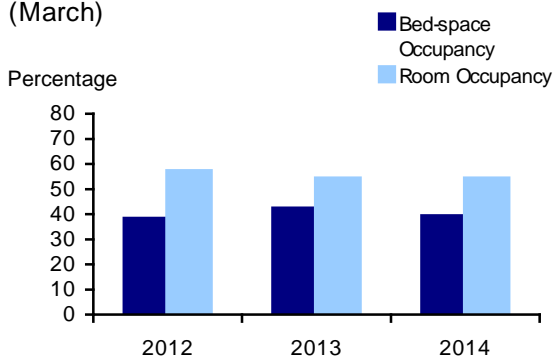
Coverage

Northern Ireland, unless otherwise stated

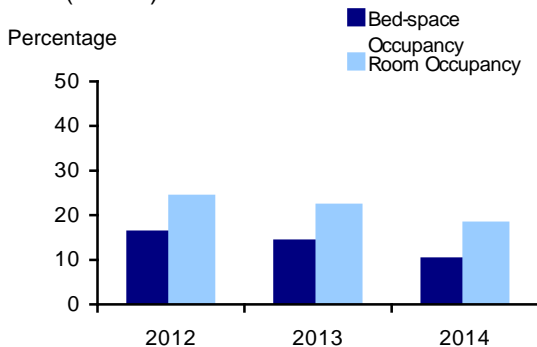
Theme

Tourism Statistics

Occupancy Rates for Hotels (March)



Occupancy Rates for B&Bs, GHs and GAs (March)



Data weighted by local authority and size.
Data is subject to revisions due to late returns.
Change reported through this bulletin is based on unrounded data
pps = percentage points

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Statistics on Accommodation in March 2014

Hotels

Average room occupancy in Hotels in March 2014 was 54%, showing no change when compared with March 2013. Average bed-space occupancy in March 2014 in Hotels was 39%, a decrease of 3 percentage points when compared with the same month in 2013. There were 131,100 rooms sold in Hotels in March 2014 showing an increase of 2%. There was a 5% decrease in the number of bed-spaces sold to 210,900 in March 2014. (Table 1)

The trend in hotel room occupancy coupled with the decrease in bed-space occupancy is likely to be explained by an increase in the number of people staying in hotels for shorter periods of time than in the previous year. Another possible reason is that Hotels may be experiencing higher rates of single occupancy.

Table 1: Occupancy Data for Hotels (March 2013/2014)

	Room Occupancy	Bed-space Occupancy**	Total Rooms Sold	Total Bed-spaces Sold**
2013	54%	42%	128,100	221,300
2014	54%	39%	131,100	210,900
Change 2013-2014 (+/-)	0pps	-3pps	+2%	-5%

*please note differences between years are calculated on unrounded figures and therefore percentage point change may not add back

**please note these figures exclude hotels who have not provided the appropriate breakdown of information

Bed & Breakfasts, Guesthouses and Guest Accommodation

Table 2 shows that in March 2014, average room occupancy in Bed and Breakfasts (B&Bs), Guesthouses (GHs) and Guest Accommodation (GA) in Northern Ireland was 18%, while average bed-space occupancy was 10%. This represents a decrease of 4 percentage points in both room occupancy and bed-space occupancy when compared with March 2013. There were 18,200 rooms sold in March 2014 showing a decrease of 11% from March 2013. There was also a decrease of 24% to 23,700 bed-spaces sold in March 2014.

Table 2: Occupancy Data for B&Bs, GHs and GAs (March 2013/2014)

	Room Occupancy	Bed-space Occupancy	Total Rooms Sold	Total Bed-spaces Sold
2013	22%	14%	20,300	31,100
2014	18%	10%	18,200	23,700
Change 2013-2014 (+/-)	-4pps	-4pps	-11%	-24%

*please note differences between years are calculated on unrounded figures and therefore percentage point change may not add back

For further information on the calculation of occupancy rates and rooms and bed-spaces sold please refer to the methodology section.

Hotel Occupancy – Year to Date

During January – March 2014, the hotel room occupancy increased by 4 percentage points (54%) while bed-space occupancy (36%) increased by 1 percentage point on the same period in 2013.

Table 3 shows there were 383,900 rooms sold in hotels in January – March 2014, an increase of 9% and 577,100 bed-spaces sold showing an increase of 4% when compared to the same period in 2013.

Table 3: Hotel Occupancy Year to Date (January - March 2013/2014)

	Room Occupancy	Bed-space Occupancy**	Rooms Sold	Bed-spaces sold**
2013	50%	35%	352,800	554,800
2014	54%	36%	383,900	577,100
Change 2013-2014 (+/-)	+4pps	+1pps	+9%	+4%

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**please note these figures exclude hotels who have not provided the appropriate breakdown of information

Hotel Size

During January - March 2014, hotels with less than 25 rooms and those with 51-100 rooms saw a decrease in room occupancy of 1 percentage point. Those hotels with 26-50 rooms and those with over 100 rooms saw an increase of 7 percentage points and 6 percentage points respectively on the same period of 2013.

When compared to the same period in 2013, bed-space occupancy increased for all hotels with the exception of those with 100+ rooms. Hotels with more 26-50 rooms experienced the largest increase in bed-space occupancy showing an increase of 9 percentage points when compared to the same period of 2013. (Table 4)

Table 4: Hotel room and bed-space occupancy rates by Size, January - March 2013/2014

Size (no. of rooms)	2013		2014		Change 2013-2014	
	Room (%)	Bed-space (%)	Room (%)	Bed-space** (%)	Room (pps)	Bed-space (pps)
All Hotels	50	35	54	36	+4	+1
Less than 25	39	26	38	27	-1	+1
26-50	38	22	46	30	+7	+9
51-100	53	36	51	37	-1	+1
100+	55	41	61	40	+6	-1

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**please note these figures exclude hotels who have not provided the appropriate breakdown of information

Price of Room - Hotels

During January - March 2014, all hotels regardless of price experienced an increase on room occupancy. Hotels priced £50-£59.99 experienced the largest increases in both room occupancy (+13 percentage points) and bed-space occupancy (+13 percentage points). Hotels priced over £60 experienced a decrease in bed-space occupancy of 2 percentage points when compared with January to March 2013.

The sample size was too small to provide a reliable estimate for those priced below £40. Table 5 shows the room and bed-space occupancy rates for Hotels by price.

Table 5: Hotel room and bed-space occupancy rates by Room Prices, January - March 2013/2014

Price	2013		2014		Change 2013-2014	
	Room (%)	Bed-space (%)	Room (%)	Bed-space (%)**	Room (pps)	Bed-space (pps)
All Hotels^	50	35	54	36	+4	+1
Less than £40	#	#	#	#	#	#
£40-£49.99	36	24	48	33	+12	+9
£50-59.99	46	31	59	45	+13	+13
£60+	52	37	54	35	+2	-2

*please note differences between years are calculated on unrounded figures and therefore percentage point change may not add back

sample size too small to provide a reliable estimate

^All hotels include those less than £40

**please note these figures exclude hotels who have not provided the appropriate breakdown of information

Hotel Grade

During January – March 2014, hotels classified as 4* and above experienced the highest bed and room-space occupancy (59% and 39% respectively).

The sample size was too small to provide a reliable estimate for hotels classified as 1*

Table 6 Hotel room and bed-space occupancy rates by Classification, January – March 2013/2014

Price	2013		2014		Change 2013-2014	
	Room (%)	Bed-space (%)	Room (%)	Bed-space (%)**	Room (pps)	Bed-space (pps)
All Hotels^	50	35	54	36	+4	+1
1 Star	#	#	#	#	#	#
2 Star	#	#	#	#	#	#
3 Star	44	35	52	34	+8	-1
4+ Star	57	37	59	39	+2	+2

*please note differences between years are calculated on unrounded figures and therefore percentage point change may not add back

sample size too small to provide a reliable estimate

^All hotels includes those unclassified, 1 star and 2 star

**please note these figures exclude hotels who have not provided the appropriate breakdown of information

Hotel Location

Table 7 shows that during January - March 2014, hotels in the Belfast and Castlereagh experienced the highest rates in room occupancy 63%. Hotels in the South West and Belfast and Castlereagh experienced the highest rates in bed-space occupancy (41%). Hotels in the Mid West experienced the lowest room occupancy rates (39%) with hotels in the Mid West also experiencing the lowest rates of bed-space occupancy (26%).

The hotel room occupancy in the North West showed a decrease of 6 percentage points in room occupancy and 5 percentage points in bed-space occupancy. Hotels in the Mid East experienced the largest increases in occupancy rates with an increase of 8 percentage points in room occupancy and 10 percentage points in bed-space occupancy.

Table 7: Hotel room and bed-space occupancy rates by Geographical region, January - March 2013/2014

Geographical Location	2013		2014		Change 2013-2014	
	Room (%)	Bed-space (%)	Room (%)	Bed-space (%)**	Room (pps)	Bed-space (pps)
All Hotels	50	35	54	36	+4	+1
North West	56	39	50	34	-6	-5
Mid West	43	27	39	26	-4	0
South West	46	37	49	41	+2	+4
North East	43	28	44	28	+1	0
South East	47	34	42	31	-5	-4
Belfast & Castlereagh	56	40	63	41	+7	+1
Mid East	37	25	45	34	+8	+10

*please note differences between years are calculated on unrounded figures and therefore percentage point change may not add back

**please note these figures exclude hotels who have not provided the appropriate breakdown of information

(Geographical regions are defined by Local Government Districts as provided:

North West– Derry, Limavady

Mid West– Cookstown, Magherafelt, Omagh, Strabane

South West – Dungannon, Fermanagh

North East – Ballymena, Ballymoney, Coleraine, Larne, Moyle

South East – Ards, Armagh, Banbridge, Craigavon, Down, Newry&Mourne

Belfast & Castlereagh –Belfast, Castlereagh

Mid East – Antrim, Carrickfergus, Lisburn, Newtownabbey, North Down)

Bed & Breakfasts, Guesthouses and Guest Accommodation Occupancy – Year to Date

Table 8 shows that during January – March 2014, the guesthouses, bed & breakfasts and guest accommodation room (16%) and bed-space (9%) occupancy both decreased by 5 percentage points when compared to the previous year. There

was a 17% decrease in the number of rooms sold to 46,200 in January –March 2014. There were 61,200 bed-spaces sold in this period which showed a 31% decrease on the same period in 2013.

Table 8: Bed & Breakfasts, Guesthouses and Guest Accommodation - Year to Date (January - March 2013/2014)

	Room Occupancy	Bed-space Occupancy	Rooms Sold	Bed-spaces sold
2013	21%	14%	55,600	88,300
2014	16%	9%	46,200	61,200
Change 2013-2014 (+/-)*	-5pps	-5pps	-17%	-31%

*please note differences between years are calculated on unrounded figures and therefore percentage point change may not add back

Bed & Breakfasts, Guesthouses and Guest Accommodation - Price of Room

During January - March 2014, all GHs, B&Bs and GAs experienced decreases in room and bed-space occupancy rates. Those priced £20-£29.99 experienced the largest decreases, with a decrease of 5 percentage points in room occupancy and 4 percentage points in bed-space occupancy when compared to the same period in 2013.

The sample size for GHs and B&B's priced less than £20 was too small to provide a reliable estimate (Table 9).

Table 9: Bed & Breakfasts, Guesthouses and Guest Accommodation room and bed-space occupancy rates by Room Prices, January - March 2013/2014

Price	2013		2014		Change 2013-2014	
	Room (%)	Bed-space (%)	Room (%)	Bed-space (%)	Room (pps)	Bed-space (pps)
All GHs, B&Bs and GAs^	21	14	16	9	-5	-5
< £20	#	#	#	#	#	#
£20-£29.99	13	9	8	5	-5	-4
£30+	20	13	17	9	-2	-3

*please note differences between years are calculated on unrounded figures and therefore percentage point change may not add back

sample size too small to provide a reliable estimate

^Total includes those priced below £20

Bed & Breakfasts, Guesthouses and Guest Accommodation - Location

Table 10 shows that during January - March 2014, Guesthouses, Bed & Breakfasts and Guest Accommodation in the South West experienced the highest room occupancy (21%).

All regions experienced a decrease in bed-space occupancy with those in the South West and the North East experiencing the largest decreases of 8 percentage points.

Table 10: Bed & Breakfasts, Guesthouses and Guest Accommodation room and bed-space occupancy rates by Geographical region, January - March 2013/2014

Geographical Location	2013		2014		Change 2013-2014	
	Room (%)	Bed-space (%)	Room (%)	Bed-space (%)	Room (pps)	Bed-space (pps)
All GHs, B&Bs and GAs^	21	14	16	9	-5	-5
North West	#	#	#	#	#	#
Mid West	16	12	7	4	-10	-7
South West	25	17	21	9	-4	-8
North East	20	13	10	6	-10	-8
South East	17	11	18	11	+1	-1
Belfast & Castlereagh	#	#	#	#	#	#
Mid East	23	14	19	10	-4	-4

*please note differences between years are calculated on unrounded figures and therefore percentage point change may not add back

Sample size too small to provide a reliable estimate

^ Total includes the 'North West' and 'Belfast and Castlereagh'

Occupancy Survey - Methodology

Sample

To offer tourist accommodation in NI, you must have a certificate from the Northern Ireland Tourist Board (NITB) - NITB refers to this as certification. It is illegal to offer tourist accommodation in NI without a certificate from NITB. The list of certified accommodation in NITB is known as the 'stock'. At the beginning of the year, a sample of the guesthouses and

bed & breakfasts in NI was drawn from the stock, particularly including good responders from the previous year to ensure year on year comparison. The process of selecting respondents can have the potential to introduce bias but the inclusion of weighting processes are designed to counteract any such bias.

In 2014, Tourism Statistics Branch has started to select respondents on a random sample basis. We will, however, need to build up a time series on this new basis to enable comparison to be made on a like for like basis before publishing any of this data. Monitoring of the comparison of the old and new systems shows no bias at this point in time and we will, of course, continue to monitor. The sample is drawn at different rates according to district council as the number of establishments in these smaller geographical areas differs. For example in Belfast there were 32 establishments in total, but 199 in Moyle and each of these establishments differs in size/price/star rating so to ensure valid data for each area, a different sample would be 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. Over the month of March 2014 the response rate for the hotel sector was 59% and 30% of sampled Guesthouses, Bed & Breakfasts and Guest Accommodation. The data is therefore based on 79 Hotel responses and 91 Guesthouses, Bed & Breakfasts and Guest Accommodation.

The information in this bulletin 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 survey, 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 as opposed to daily data).

Terminology

The main measures are bed-space occupancy and room occupancy.

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 over the months 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. $(\text{Total number of bed-spaces occupied} / \text{total number of bed-spaces available}) * 100$

Bed-space occupancy rates for hotels 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. $(\text{Total number of rooms occupied} / \text{Total number of rooms available}) * 100$

Weekend/Weekday

Weekends are defined as Friday, Saturday and Sunday, with Monday to Thursday being defined as weekdays.

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 for

hotels exclude those who have not provided the appropriate breakdown of information i.e. those who have not provided information on the number of guests.

Revision 05/06/2014

Please note that corrections have been made to this document. These corrections were necessary due to a revision to the data to exclude missing cases i.e. those who have not provided information on the number of guests have been excluded. This has caused a slight change to the hotel bed-space occupancy rates and bed-spaces sold. A list of revisions to the document can be found below.

The original report stated: -

- “Average bed-space occupancy in March 2014 in Hotels was 34%, a decrease of 8 percentage points when compared with the same month in 2013”; “There was a 17% decrease in the number of bed-spaces sold to 182,900 in March 2014.” this has subsequently been revised to “Average bed-space occupancy in March 2014 in Hotels was 39%, a decrease of 3 percentage points when compared with the same month in 2013”; “There was a 5% decrease in the number of bed-spaces sold to 210,900 in March 2014.”
- “bed-space occupancy (33%) decreased by 2 percentage points on the same period in 2013”, “522,000 bed-spaces sold showing a decrease of 6% when compared to the same period in 2013” this has subsequently been revised to “bed-space occupancy (36%) increased by 1 percentage point on the same period in 2013”, “577,100 bed-spaces sold showing an increase of 4% when compared to the same period in 2013.”
- “When compared to the same period in 2013, bed-space occupancy increased for hotels with 26-50 rooms by 3 percentage points. Hotels with more than 100 rooms experienced the largest decrease in bed spaces sold showing a decrease of 6 percentage points when compared to the same period of 2013.” this has subsequently been revised to “When compared to the same period in 2013, bed-space occupancy increased for all hotels with the exception of those with 100+ rooms. Hotels with more 26-50 rooms experienced the largest increase in bed-space occupancy showing an increase of 9 percentage points when compared to the same period of 2013.”
- “Hotels priced £50-£59.99 experienced the largest increases... in bed-space occupancy (+12 percentage points). Hotels priced over £60 experienced a decrease in bed-space occupancy of 6 percentage points when compared with January to March 2013” this has subsequently been revised to “Hotels priced £50-£59.99 experienced the largest increases... in bed-space occupancy (+13 percentage points). Hotels priced over £60 experienced a decrease in bed-space occupancy of 2 percentage points when compared with January to March 2013”
- “hotels classified as 4* and above experienced the highest bed and room-space occupancy (59% and 34% respectively)” this has subsequently been revised to “hotels classified as 4* and above experienced the highest bed and room-space occupancy (59% and 39% respectively).”
- “Hotels in the South West experienced the highest rates in bed-space occupancy (40%). Hotels in the Mid West experienced the lowest room occupancy rates (39%) with hotels in the Mid West also experiencing the lowest rates of bed-space occupancy (27%). The hotel room occupancy in the North West showed a decrease of 6 percentage points in both room and bed-space occupancy. Hotels in the Mid East experienced the largest increases in occupancy rates with an increase of 8 percentage points in both room occupancy and bed-space occupancy.” this has subsequently been revised to “Hotels in the South West and Belfast and Castlereagh experienced the highest rates in bed-space occupancy (41%). Hotels in the Mid West experienced the lowest room occupancy rates (39%) with hotels in the Mid West also experiencing the lowest rates of bed-space occupancy (26%). The hotel room occupancy in the North West showed a decrease of 6 percentage points in room occupancy and 5 percentage points in bed-space occupancy. Hotels in the Mid East experienced the largest increases in occupancy rates with an increase of 8 percentage points in room occupancy and 10 percentage points in bed-space occupancy.”