

11 July 2013

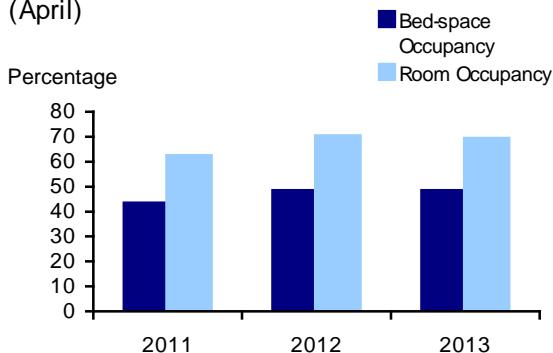
Coverage

Northern Ireland, unless otherwise stated

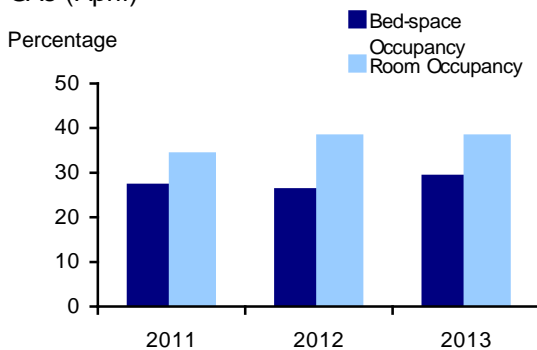
Theme

Tourism Statistics

Occupancy Rates for Hotels (April)



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



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 May 2013

Hotels

Average room occupancy in Hotels in May 2013 was 69%, a decrease of 1 percentage point when compared with May 2012. Average bed-space occupancy in May 2013 in Hotels was 48%, showing no change when compared with the same month in 2012. There were 165,500 rooms sold in Hotels in May 2013 showing no change in comparison to May 2012. There was a 4% increase in the number of bed-spaces sold to 258,100 in May 2013. (Table 1)

Table 1: Occupancy Data for Hotels (May 2012/2013)

| | Room Occupancy | Bed-space Occupancy | Total Rooms Sold | Total Bed- spaces Sold |
|------------------------|-------------------|------------------------|---------------------|---------------------------|
| 2012 | 70% | 48% | 164,500 | 249,200 |
| 2013 | 69% | 48% | 165,500 | 258,100 |
| Change 2012-2013 (+/-) | -1pps | 0pps | 0% | 4% |

*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

Table 2 shows that in May 2013, average room occupancy in Bed and Breakfasts (B&Bs), Guesthouses (GHs) and Guest Accommodation (GA) in Northern Ireland was 38%, while average bed-space occupancy was 29%. This represents a decrease of 1 percentage point in room occupancy and a 2 percentage point increase in bed-space occupancy when compared with May 2012. There were 45,200 rooms sold in May 2013 showing an increase of 35% from May 2012. There was an increase of 33% to 69,000 bed-spaces sold in May 2013.

Table 2: Occupancy Data for B&Bs, GHs and GAs (May 2012/2013)

| | Room Occupancy | Bed-space Occupancy | Total Rooms Sold | Total Bed- spaces Sold |
|------------------------|-------------------|------------------------|---------------------|---------------------------|
| 2012 | 39% | 26% | 33,400 | 51,700 |
| 2013 | 38% | 29% | 45,200 | 69,000 |
| Change 2012-2013 (+/-) | -1pps | 2pp | 35% | 33% |

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

The hotel occupancy survey is a census of all certified hotels in Northern Ireland. The B&B, GHs and GAs element is a disproportionate stratified sample. The data has been weighted for non-response assuming no non-response bias and also weighted by local authority and size. The response rate for May 2013 for Hotels in NI was 43% (60 respondents) and for B&Bs, GHs and GA (105 respondents) was 30%. More information can be found in the methodological section.

Hotel Occupancy – Year to Date

During January – May 2013, the hotel room occupancy decreased by 3 percentage points (56%) while bed-space occupancy (39%) experienced a decrease of 2 percentage points when compared to the same period in 2012.

Table 3 shows there were 655,200 rooms sold in hotels in January – May 2013, a decrease of 4% and 1,025,400 bed-spaces sold showing a decrease of 1% when compared to the same period in 2012.

Table 3: Hotel Occupancy Year to Date (January - May 2012/2013)

| | Room | | Rooms Sold | Bed-spaces sold |
|------------------------|-----------|---------------------|------------|-----------------|
| | Occupancy | Bed-space Occupancy | | |
| 2012 | 59% | 41% | 679,400 | 1,034,500 |
| 2013 | 56% | 39% | 655,200 | 1,025,400 |
| Change 2012-2013 (+/-) | -3pps | -2pps | -4% | -1% |

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

Hotel Size

During January - May 2013, all hotels saw a decrease in room occupancy. Those hotels with 26-50 rooms experienced the largest decrease in room occupancy (-6 percentage points). Those hotels with less than 25 rooms saw the smallest decrease of 1 percentage point on the same period of 2012.

When compared to the same period in 2012, bed-space occupancy increased for hotels with 26-50 rooms by 1 percentage. Hotels with more than 100 rooms experienced the largest decrease in bed spaces sold showing a decrease of 4 percentage points while those with less than 25 and those with 51-100 rooms showing no change. (Table 4)

Table 4: Hotel room and bed-space occupancy rates by Size, January – May 2012/2013

| Size (no. of rooms) | 2012 | | 2013 | | Change 2012-2013 | |
|---------------------|----------|---------------|----------|---------------|------------------|-----------------|
| | Room (%) | Bed-space (%) | Room (%) | Bed-space (%) | Room (pps) | Bed-space (pps) |
| All Hotels | 59 | 41 | 56 | 39 | -3 | -2 |
| Less than 25 | 43 | 30 | 42 | 30 | -1 | 0 |
| 26-50 | 50 | 25 | 44 | 26 | -6 | +1 |
| 51-100 | 59 | 39 | 56 | 39 | -3 | 0 |
| 100+ | 66 | 50 | 52 | 46 | -4 | -4 |

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Price of Room - Hotels

During January - May 2013, hotels priced £40-£49.99 and those priced £60+ experienced a decrease in both room occupancy (-4 percentage points) and bed-space occupancy (-2 percentage points). Hotels priced £50-£59.99 experienced an increase in room occupancy of 9 percentage points while bed-space occupancy increased by 7 percentage points when compared with January to May 2012.

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 - May 2012/2013

| Price | 2012 | | 2013 | | Change 2012-2013 | |
|-------------------------|----------|---------------|----------|---------------|------------------|-----------------|
| | Room (%) | Bed-space (%) | Room (%) | Bed-space (%) | Room (pps) | Bed-space (pps) |
| All Hotels [^] | 59 | 41 | 56 | 39 | -3 | -2 |
| Less than £40 | # | # | # | # | * | # |
| £40-£49.99 | 46 | 32 | 42 | 30 | -4 | -2 |
| £50-59.99 | 46 | 32 | 55 | 38 | +9 | +7 |
| £60+ | 62 | 43 | 58 | 41 | -4 | -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

Hotel Grade

During January – May 2013, hotels classified as 4* and above experienced the highest bed and room-space occupancy (62% and 42% respectively). The sample size was too small to provide a reliable estimate for hotels classified as 1 and 2 Star.

Table 6 Hotel room and bed-space occupancy rates by Classification, January – May 2012/2013

| Price | 2012 | | 2013 | | Change 2012-2013 | |
|-------------------------|----------|---------------|----------|---------------|------------------|-----------------|
| | Room (%) | Bed-space (%) | Room (%) | Bed-space (%) | Room (pps) | Bed-space (pps) |
| All Hotels [^] | 59 | 41 | 56 | 39 | -3 | -2 |
| 1 Star | # | # | # | # | # | # |
| 2 Star | # | # | # | # | # | # |
| 3 Star | 51 | 29 | 50 | 38 | 0 | +9 |
| 4+ Star | 56 | 41 | 62 | 42 | + | +1 |

*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

Hotel Location

Table 7 shows that during January - May 2013, hotels in the Belfast and Castlereagh and those in the North West experienced the highest rates in room occupancy 63%. Hotels in Belfast and Castlereagh also experienced the highest rates in bed-space occupancy (44%). Hotels in the Mid East experienced the lowest room occupancy rates (40%) and bed-space occupancy rates (28%).

The hotel room occupancy in the South West showed a decrease of 14 percentage points and a decrease of 5 percentage points in bed-space occupancy. Hotels in the North West experienced the largest increases in occupancy rates with an increase of 9 percentage points in room occupancy and a 6 percentage point increase in bed-space occupancy. Hotels in the South East also showed an increase of 3 percentage points in room occupancy.

Table 7: Hotel room and bed-space occupancy rates by Geographical region, January - May 2012/2013

| Geographical Location | 2012 | | 2013 | | Change 2012-2013 | |
|-----------------------|----------|---------------|----------|---------------|------------------|-----------------|
| | Room (%) | Bed-space (%) | Room (%) | Bed-space (%) | Room (pps) | Bed-space (pps) |
| All Hotels | 59 | 41 | 56 | 39 | -3 | -2 |
| North West | 55 | 36 | 63 | 43 | +9 | +6 |
| Mid West | 44 | 28 | 45 | 29 | 0 | +1 |
| South West | 66 | 46 | 52 | 41 | -14 | -5 |
| North East | 52 | 33 | 49 | 33 | -3 | -1 |
| South East | 47 | 36 | 50 | 38 | +3 | 0 |
| Belfast & Castlereagh | 68 | 49 | 63 | 44 | -5 | -4 |
| Mid East | 45 | 28 | 40 | 28 | -5 | +0 |

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

(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 – May 2013, the guesthouses, bed & breakfasts and guest accommodation room (26%) and bed-space (18%) occupancy both increased by 1 percentage point when compared to the previous year. There was an

11% increase in the number of rooms sold to 126,600 in January – May 2013. There were 198,200 bed-spaces sold in this period which showed a 15% increase on the same period in 2012.

Table 8: Bed & Breakfasts, Guesthouses and Guest Accommodation - Year to Date (January - May 2012/2013)

| | Room Occupancy | Bed-space Occupancy | Rooms Sold | Bed-spaces sold |
|-------------------------|----------------|---------------------|------------|-----------------|
| 2012 | 24% | 16% | 114,000 | 173,100 |
| 2013 | 26% | 18% | 126,600 | 198,200 |
| Change 2012-2013 (+/-)* | +1pps | +1pps | +11% | +15% |

*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 - May 2013, GHs, B&Bs and GAs priced £20-£29.99 experienced a decrease of 4 percentage points in bed-space occupancy when compared to the same period in 2012. Room occupancy for those GHs, B&Bs and GAs priced £30 and over showed a 2 percentage point increase. 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 - May 2012/2013

| Price | 2012 | | 2013 | | Change 2012-2013 | |
|------------------------|----------|---------------|----------|---------------|------------------|-----------------|
| | Room (%) | Bed-space (%) | Room (%) | Bed-space (%) | Room (pps) | Bed-space (pps) |
| All GHs, B&Bs and GAs^ | 24 | 16 | 26 | 18 | +1 | +1 |
| < £20 | # | # | # | # | # | # |
| £20-£29.99 | 20 | 12 | 16 | 11 | -4 | -1 |
| £30+ | 26 | 17 | 28 | 19 | +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

^Total includes those priced below £20

Bed & Breakfasts, Guesthouses and Guest Accommodation - Location

Table 10 shows that during January - May 2013, Guesthouses, Bed & Breakfasts and Guest Accommodation in the South West experienced the highest room occupancy (29%). Those in the Mid West experienced the lowest room occupancy of 18% though this was an increase of 3 percentage points on the same period in 2012.

All regions experienced an increase in room-occupancy and bed-space occupancy with those in the North West experienced the largest increase in both room and bed-space occupancy of 9 percentage points..

Table 10: Bed & Breakfasts, Guesthouses and Guest Accommodation room and bed-space occupancy rates by Geographical region, January – May 2012/2013

| Geographical Location | 2012 | | 2013 | | Change 2012-2013 | |
|------------------------|----------|---------------|----------|---------------|------------------|-----------------|
| | Room (%) | Bed-space (%) | Room (%) | Bed-space (%) | Room (pps) | Bed-space (pps) |
| All GHs, B&Bs and GAs^ | 24 | 16 | 26 | 18 | +1 | +1 |
| North West | 15 | 10 | 25 | 19 | +9 | +9 |
| Mid West | 16 | 11 | 18 | 14 | +3 | +2 |
| South West | 28 | 17 | 29 | 19 | +1 | +2 |
| North East | 25 | 16 | 26 | 18 | +1 | +2 |
| South East | 16 | 11 | 23 | 15 | +8 | +3 |
| Belfast & Castlereagh | # | # | # | # | # | # |
| Mid East | 25 | 17 | 27 | 18 | +2 | +1 |

*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

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. 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 May 2013 the response rate for the hotel sector was 43% and 30% of sampled Guesthouses, Bed & Breakfasts and Guest Accommodation. The data is therefore based on 60 Hotel responses and 105 Guesthouses, Bed & Breakfasts and Guest Accommodation.

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

Data is weighted by the number of bed-spaces, number of rooms and district council. 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. $(\text{Total number of bed-spaces occupied} / \text{Total number of bed-spaces available}) * 100$

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.