Northern Ireland GH/GA/BB Performance

January – March 2016

tourism northernireland

Guesthouses, Guest Accommodation and B&Bs

B&B

Room occupancy
Jan-Mar 2016

ROOM
22%

+4pps on
Jan-Mar 2015

Bed-space occupancy
Jan-Mar 2016

BEDS
15%

+4pps on
Jan-Mar 2015

Source: NISRA
pp s= percentage points

- Guesthouse/guest accommodation / B&B occupancy rates were up compared with Jan-Mar 2015
- Room occupancy increased by 4 percentage points to record a level of 22%
- Bed-space occupancy was 15% an increase of 4 percentage points on Jan-Mar 2015
- Rooms sold in guesthouses, guest accommodation and B&B's recorded an increase of 31% to 60,842, there were an additional 14,334 rooms sold compared to Jan-Mar 2015
- Bed-spaces sold during Jan-Mar 2016 recorded an increase of 26,570 to 99,733, there were an additional 26,570 rooms sold compared to Jan-Mar 2015
- At the end of March there were 685 guesthouses, guest accommodation and B&B establishments (excluding campus) operating with 3,001 rooms and 6,879 bed-spaces available, showing a 2% increase on both rooms and bed-spaces available compared with the end March 2015

60,843
Rooms sold

Up 31% on Jan-Mar 2015

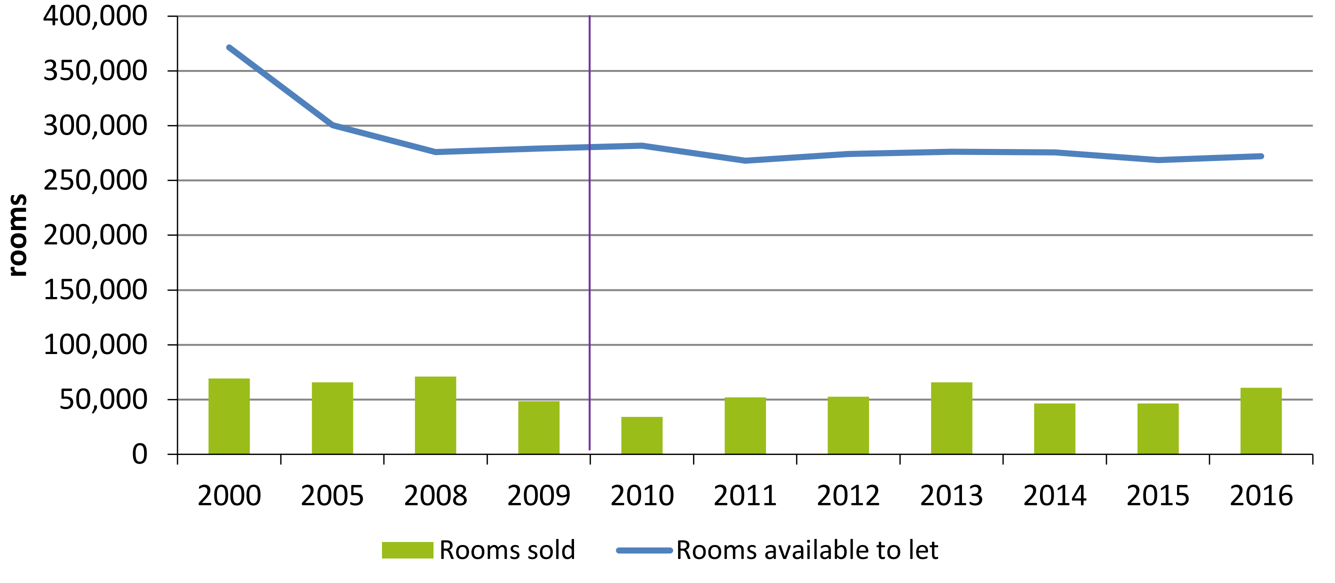
99,733
Bed-spaces sold

Up 36% on Jan-Mar 2015

Source: NISRA

Trends in GH/GA/BB rooms sold and GH/GA/BB room stock availability

- The following chart shows both available room capacity and the estimated number of GH/GA/BB rooms sold in Northern Ireland during the Jan-Mar period between 2000-2016. Following significant declines, the capacity has remained relatively stable since 2008
- At end March 2016, there were 3,001 rooms and 6,879 bed-spaces available in guesthouses, guest accommodation and B&Bs (excluding campus) across Northern Ireland, a decrease of 27% in room stock and 25% in bed-space stock compared to year end 2000



Source: Rooms sold 2000-2009 Tourism NI 2010-2016 NISRA
Stock 2000- 2016 Tourism NI (note: capacity is based on end March and grossed up by number days available for the period Jan-Mar)

GH/GA/BB performance by price (per person per night), January – March 2016

	2012		2013		2014		2015		2016		Change 2015/ 2016*	
Room and bed-space occupancy by price Jan-Sep	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)
<£20	#	#	#	#	#	#	#	#	#	#	#	#
£20-£29.99	#	#	34	22	20	10	14	7	8	5	-6	-3
£30+	#	#	23	16	16	11	20	13	23	16	+3	+4
Total‡	#	#	24	16	17	11	17	11	22	15	+4	+4

- During Jan-Mar 2016 guesthouses, guest accommodation and B&Bs priced £30 and over experienced a 3 percentage point increase in room occupancy and a 4 percentage point increase in bed-space occupancy
- Guesthouses, guest accommodation and B&Bs priced £20-£29.99 recorded a 6 percentage point decrease in room occupancy and a 4 percentage point decrease in bed-space occupancy
- The sample size for those priced less than £20 was too small to provide a reliable estimate
- There is a disparity across price ranges, however the majority of establishments would fall into the highest price bracket resulting in more sales

Source: NISRA

* Differences between years are calculated on unrounded figures
† Figures have been calculated excluding hotels who have not provided the appropriate breakdown of information
# Sample size too small to provide a reliable estimate
‡ Total includes those priced less than £20

GH/GA/BB by Local Government District, January – March 2016

- Performance varied across Northern Ireland Local Government Districts
- The Lisburn and Castlereagh City and Mid and East Antrim Districts recorded the highest room occupancy of 32%
- The Newry, Mourne and Down District recorded the lowest room occupancy of 14%, albeit showing increases in room and bed-space occupancy of 3 and 4 percentage points respectively
- Guesthouses, guest accommodation and B&Bs in Antrim and Newtownabbey and Mid Ulster were the only Districts to experience declines in room and bed-space occupancy
- The Armagh City, Banbridge and Craigavon District room occupancy increased by 10 percentage points to record a room occupancy of 27%, the highest level recorded for this District for sometime
- The Fermanagh and Omagh District room (25%) occupancy remained consistent with the same period last year while bed-space occupancy increased by 2 percentage points, suggesting more multiple occupancy of rooms
- Guesthouses, guest accommodation and B&Bs in the Ards and North Down District recorded a room occupancy of 16% and bed-space occupancy of 10%, an increase of 4 and 2 percentage points respectively
- The Causeway Coast and Glens experienced a 7 percentage point increase in room (19%) occupancy and a 6 percentage point increase in bed-space (15%) occupancy

	2013		2014		2015		2016		Change 2015/ 2016*	
	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (pps)	Bed-space (pps)
Antrim and Newtownabbey	#	#	#	#	18	12	15	10	-3	-2
Ards and North Down	4	3	21	14	13	9	16	10	+4	+2
Armagh City, Banbridge and Craigavon	13	9	11	7	17	11	27	18	+10	+7
Belfast City	#	#	#	#	#	#	#	#	#	#
Causeway Coast and Glens	15	12	18	13	12	9	19	15	+7	+6
Derry City and Strabane	7	4	10	7	16	14	#	#	#	#
Fermanagh and Omagh	17	12	15	8	25	16	25	18	0	+2
Lisburn and Castlereagh City	24	16	24	12	23	14	32	19	+9	+6
Mid and East Antrim	18	11	7	3	31	20	32	27	+2	+7
Mid Ulster	36	27	10	7	29	19	27	14	-3	-5
Newry, Mourne and Down	14	12	17	12	12	7	14	11	+3	+4
All Hotels‡	24	16	17	11	17	11	22	15	+4	+4

Source: NISRA

* Differences between years are calculated on unrounded figures
†Figures have been calculated excluding hotels who have not provided the appropriate breakdown of information
Sample size too small to provide a reliable estimate
‡ Total includes Belfast & Castlereagh

GH/BB/GA performance March 2016*

- Average room occupancy in guesthouse, guest accommodation and B&Bs for March 2016 was 29%, an increase of 9 percentage points compared with March 2015
- Average bed-space occupancy (21%) recorded an increase of 8 percentage points compared with March 2015
- The number of rooms sold during March 2016 increased by 36% to 27,902
- There were 47,330 bed-spaces sold in March 2016 an increase of 44% on March 2015

*please note difference between years are calculated on unrounded figures

GH/GA/BB OCCUPANCY 2010-2016*

		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	ANNUAL AVERAGE
2016	Room	13	23	**29**										
	Bed-space	9	16	**21**										
2015	Room	15	22	23	24	34	36	38	45	32	25	18	15	27
	Bed-space	11	14	16	17	27	27	32	37	25	20	13	11	20
2014	Room	14	17	20	23	33	38	40	49	39	26	20	16	28
	Bed-space	9	10	13	17	25	28	34	40	27	19	14	12	21
2013	Room	20	27	26	26	38	31	37	36	31	34	29	24	30
	Bed-space	12	19	18	19	29	24	32	29	23	24	16	12	22
2012	Room	14	18	24	29	39	46	47	52	42	32	25	23	33
	Bed-space	9	12	16	19	26	35	34	41	31	24	18	16	23
2011	Room	15	21	20	30	34	36	40	49	37	30	19	15	29
	Bed-space	10	15	13	23	27	26	30	37	28	21	13	11	21
2010	Room	12	11	15	21	31	35	41	49	37	26	21	19	27
	Bed-space	9	8	10	17	24	25	34	37	27	21	14	12	21

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