



GUESTHOUSE AND BED AND BREAKFAST OCCUPANCY SURVEY

MONTHLY REPORT – FEBRUARY 2005

Average room occupancy in guesthouse and bed and breakfast establishments for February was 21%, the same level recorded for February 2004. Average bed-space occupancy was also unchanged with last year's level of 15%. This represents a gross estimate of 20,300 bedrooms and 32,600 bed-spaces sold during February 2005, decreases of 10% and 9% respectively on February 2004.

By Type

Average room occupancy in guesthouses was 24%, down 1 percentage point on February 2004. Bed and breakfast establishments recorded an increase of 1 percentage point to give a room occupancy of 20%.

Visitor content in guesthouses increased by 9 percentage points from 41% to 50%. Visitor content in bed and breakfast establishments was 65%, a drop of 11 percentage points on the 2004 level.

By Region

Only the North West area of Northern Ireland was able to show an increase in average room occupancy on February 2004, up 3 percentage points to record a level of 18%. The North East, South West and South East areas showed decreases of 2, 1 and 1 percentage points to give room occupancy levels of 21%, 13% and 21% respectively. The limited return for the Belfast region was too small to ensure accurate occupancy statistics.

By Price

Guesthouse and bed and breakfast establishments in the £20-£29.99 price range experienced an increase of 3 percentage points to give a room occupancy level of 21%. Establishments in other price ranges experienced decreases in room occupancy.

SAMPLE SIZE IN FEBRUARY WAS 152 GUESTHOUSE AND BED AND BREAKFAST ESTABLISHMENTS WITH 657 BEDROOMS AND 1,558 BED-SPACES. EXCLUDING UNIVERSITY AND COLLEGE STOCK, IN FEBRUARY 2005 NORTHERN IRELAND GUESTHOUSE AND BED AND BREAKFAST STOCK COMPRISED OF 796 ESTABLISHMENTS WITH 3,460 BEDROOMS AND 7,760 BED-SPACES.

GUESTHOUSE AND BED AND BREAKFAST OCCUPANCY SURVEY FEBRUARY 2005

	Monthly sample size		Average Room Occupancy						Average Bed-space Occupancy						Visitor Content ¹					
			Monthly		Weekend		Weekday		Monthly		Weekend		Weekday		Monthly		Weekend		Weekday	
	No.	No. of rooms	2004 %	2003 %	2004 %	2003 %	2004 %	2003 %	2004 %	2003 %	2004 %	2003 %	2004 %	2003 %	2004 %	2003 %	2004 %	2003 %	2004 %	2003 %
Type																				
Guesthouses	30	238	24	25	26	32	23	25	16	18	19	25	14	15	50	41	43	35	62	62
Bed and Breakfast	122	419	20	19	20	19	19	19	14	13	16	14	13	13	65	76	63	68	68	84
Region																				
Belfast	++	++	++	++	++	++	++	++	++	++	++	++	++	++	++	++	++	++	++	++
North West	23	94	18	15	18	20	18	18	12	11	14	17	11	11	56	44	63	25	48	60
North East	47	173	21	23	24	27	19	22	16	16	19	19	14	15	53	69	47	62	60	85
South West	24	128	13	14	16	16	12	11	9	10	12	14	8	7	44	41	39	32	51	56
South East	54	230	21	22	18	19	22	23	13	16	14	15	12	15	63	69	53	68	77	80
Price																				
Less than £20	22	87	11	18	15	15	7	21	9	15	13	13	6	17	47	94	47	89	46	97
£20-£29.99	101	390	21	18	22	22	20	17	14	12	16	16	13	10	58	60	53	53	62	72
£30 or more	29	180	26	28	26	31	26	30	19	20	20	23	18	17	64	43	59	40	75	62
Average			21	21	22	23	20	21	15	15	17	17	13	13	59	63	54	56	65	79

1. Arrivals from outside Northern Ireland as a percentage of total arrivals.

++ Sample size too small for accurate results.

OCCUPANCY SURVEY – BED AND BREAKFAST ESTABLISHMENTS ONLY FEBRUARY 2005

	Monthly sample size		Average Room Occupancy						Average Bed-space Occupancy						Visitor Content ¹					
			Monthly		Weekend		Weekday		Monthly		Weekend		Weekday		Monthly		Weekend		Weekday	
	No.	No. of rooms	2004 %	2003 %	2004 %	2003 %	2004 %	2003 %	2004 %	2003 %	2004 %	2003 %	2004 %	2003 %	2004 %	2003 %	2004 %	2003 %	2004 %	2003 %
Region																				
Belfast	++	++	++	++	++	++	++	++	++	++	++	++	++	++	++	++	++	++	++	++
North West	18	48	8	10	8	7	8	11	6	6	7	7	5	6	66	69	87	60	47	76
North East	42	122	22	19	22	20	22	20	18	13	19	14	17	14	67	84	70	76	65	90
South West	16	79	13	11	17	13	10	9	9	9	14	11	6	6	46	42	41	35	56	50
South East	44	149	19	22	18	20	20	23	12	15	14	15	10	15	60	74	46	68	73	80
Price																				
Less than £20	21	81	10	19	14	16	7	22	8	16	13	13	5	19	44	95	44	92	46	97
£20-£29.99	82	260	20	16	21	18	20	15	15	10	17	13	13	9	63	61	62	56	65	68
£30 or more	19	78	24	32	20	29	27	34	16	21	15	21	16	21	86	74	85	66	86	84
Average			20	19	20	19	19	19	14	13	16	14	13	13	65	76	63	68	68	84

1. Arrivals from outside Northern Ireland as a percentage of total arrivals.

GUESTHOUSE AND BED AND BREAKFAST OCCUPANCY¹

		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YEAR AVERAGE
2005	Room	15	21											
	Bed-space	10	15											
2004	Room	15	21	26	33	36	39	46	50	39	29	22	18	31
	Bed-space	10	15	19	25	28	30	39	43	30	21	15	13	24
2003	Room	14	18	20	27	36	37	39	48	36	28	21	15	29
	Bed-space	9	12	14	20	28	28	31	40	27	21	14	10	22
2002	Room	15	17	21	25	31	33	34	39	32	22	17	13	26
	Bed-space	10	11	16	19	25	25	28	33	25	16	12	9	20
2001	Room	15	21	21	25	27	34	36	45	32	24	18	15	27
	Bed-space	11	14	14	19	21	26	29	37	25	17	12	10	20
2000	Room	14	21	19	28	33	36	36	43	34	23	21	14	28
	Bed-space	9	14	12	21	26	27	30	35	25	16	13	10	21
1999	Room	16	17	22	27	33	37	37	46	35	26	22	15	28
	Bed-space	11	12	15	19	25	28	31	38	28	19	15	10	21
1998	Room	14	14	19	23	31	35	32	41	32	25	20	15	26
	Bed-space	10	10	13	18	22	26	26	34	24	18	14	11	20
1997	Room	22	20	24	21	32	34	33	45	33	25	19	14	27
	Bed-space	14	13	18	16	25	26	27	36	26	19	13	9	20

¹ A new survey methodology was introduced in 1997 therefore caution should be taken when comparing pre-1997 results with post-1997 results. Due to the late arrival of some returns, these results may be subject to revision.