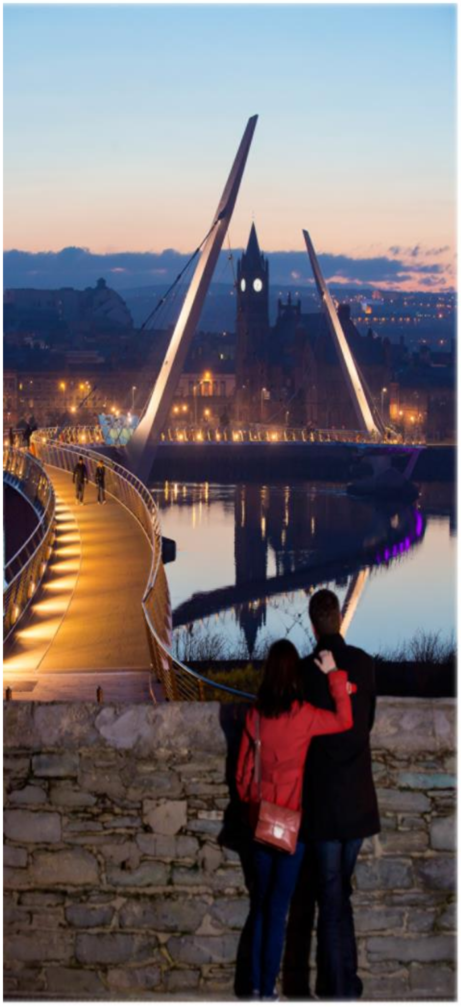
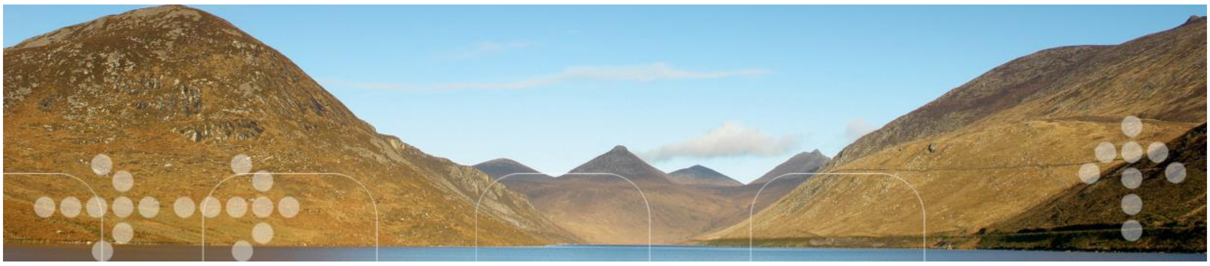
tourism northernireland

MillwardBrownUlster

TOURISM INDUSTRYBAROMETER

JUNE 2016





Contents

All research complied fully within the Market Research Society ethical Code of Conduct and in accordance with the definitive standards of IQCS (Interviewer Quality Control Scheme) and MRQSA (Market Research Quality Standards Authority) ISO 20252:2012

1. Background and Methodology

Background and objectives

1.1 The Northern Ireland Tourism Industry Barometer is a survey of tourism businesses designed to provide insight into tourism performance for the year to date and prospects for the remainder of the year / the following year.

1.2 In June 2015, Millward Brown Ulster, an independent research agency, was commissioned to conduct the survey in 2015, 2016 and 2017.

1.3 Fieldwork for the fourth wave in 2016 took place between 18th June and 8th July. The objectives were to measure:

- Business performance year to date in terms of visitor volume – overall and by key markets
- Profitability year to date
- Average room yield year to date (hotels)
- Visitor volume expectations for 2016

Methodology

1.4 The methodology used was a combination of an online survey and telephone interviews.

1.5 Tourism NI and Millward Brown Ulster worked together to develop a questionnaire for online and telephone interviewing.

1.6 Tourism NI provided a database of 3,038 contacts for the survey spread across numerous industry sectors (see sampling profile in appendix). Millward Brown removed all duplicate contacts so that owners or managers of more than one tourism business only received the survey once – this left an active database of 2,618 contacts.

1.7 An e-mail was sent on 18th June to all contacts on the database containing a link to the online survey and an explanation of the survey objectives. Two subsequent reminder emails were sent to non-respondents.

1.8 Following this, we conducted 290 'top-up' interviews by telephone with non-responders in order to improve the robustness of individual sector sample sizes so that results can be reported by sector. Interviews were conducted in daytime and evening hours with business owners or managers.

2. Headline Findings

The Tourism Industry Barometer and how it is conducted

2.1 The Northern Ireland Tourism Industry Barometer is a survey of tourism businesses designed to provide insight into tourism performance for the year to date and prospects for the remainder of the year / the following year.

2.2 Millward Brown Ulster received 213 responses to an online survey with tourism businesses in mid-June to early July 2016, and conducted 290 top-up telephone interviews.

Good performance for hotel sector

2.3 Hotels enjoyed a solid first period of 2016, with over two fifths (43%) hotels reported increased visitor numbers compared with the same period last year. This was on top of a very strong performance in 2015, when more than 7 in 10 (73%) of responding hotels reported performance to be up on 2014.

2.4 All markets, with the exception of the Republic of Ireland market, showed good signs of growth, with significantly more respondents reporting increases rather than decreases in visitor levels compared with the equivalent period of 2015. The overseas market performed particularly strongly. Nearly half of hoteliers cited an increase in visitor numbers from overseas (48%). Only a small minority of hoteliers (7%) cited decreases in these overseas markets.

Hotels' room yield and profitability shine

2.5 The increase in visitor volumes enjoyed by hotels is also reflected by very healthy increases in both average room yield and profitability (38% reported profitability to be up and 55% reported average room yield to be up in June 2016 compared with first half of 2015).

Business trips take the lead

2.6 Hotels enjoyed increases in most types during 2016, but especially with regards to their business/ corporate volumes (56% reported an increase in June 2016 compared with the early part of 2015).

2.7 Weekend breaks, general leisure and mid-week breaks also fared very well. More than half of all hoteliers reported an increase in weekend breaks (55%) and more than two fifths cited an increase in mid-week breaks (45%) and general leisure breaks (43%).

Positive year for the guesthouse market

2.8 Guesthouses have seen a positive start to 2016, with more around two fifths (38%) of respondents reporting an increase in visitor volumes compared to the same period of 2015.

More decline than growth for B&Bs

2.9 B&B operators experienced mixed results from January to June 2016; the challenge they have faced over recent years continues. A third (33%) reported an increase in business in June 2016, however, a greater proportion (35%) reported visitor volumes to be down on the same period of 2015.

Self-catering slowly improving

2.10 A third (33%) of self-catering operators reported visitor volumes to be up in June 2016, while 3 in 10 (31%) reported visitor volumes lower than those experienced in the first half of 2015. This was a similar picture to that seen in June last year when similar proportions (34%) reported increases and decreases (29%).

2.11 Positively, approximately two fifths of self-catering operators reported visitor volumes from the overseas markets to be up on the same period last year.

Good growth for attractions

2.12 Overall, attraction providers enjoyed good growth in June 2016, almost half (46%) reported an increase in visitor volumes on the levels achieved in the first half of 2015.

2.13 All markets were up on balance; more respondents reported an increase in visitor volumes compared to those who reported a decrease on the same period last year. Almost half of attraction providers reported an increase in overseas visitor volumes (48%).

Strong start to year for Belfast

2.14 PSA operators in Belfast have enjoyed a strong start to 2016, almost three fifths (58%) of Paid Serviced Accommodation (PSA) respondents reported business to be up on last year, with Belfast the best performing region. Belfast did not perform as strongly across all sectors as did in the PSA sector.

Increases in the East not as great as same time last year

2.15 Approximately a third of PSA respondents in the South East (36%) and the North East (35%) reported an increase in visitor levels in the first period of 2016. That being said this represents a slightly weaker position to June 2015 when the proportion stating an increase in the North East was 45% and the proportion stating an increase in the South East was 38%.

Difficulties continue in the West but showing some improvement

2.16 The South West of NI was the weakest performing region; a quarter (25%) of PSA respondents reported an increase and two fifths (38%) reported a decrease in business. Paid Serviced Accommodation (PSA) in the North West of NI had a better start to the year than 2015 with more than a third (34%) of respondents reporting business to be up, with only a quarter (23%) reporting business to be down compared with a third in June 2015.

Relatively positive expectations for remainder of 2016

2.17 Overall, tourism operators have an optimistic outlook continuing in the second half of 2016, around two fifths (39%) expect business to be up on the same period of 2015. Hotels are most positive for 2016 with more than three quarters (76%) expecting business to be up.

2.18 Other accommodation providers had mixed views. On balance there was more positivity from Guesthouse and B&Bs but the self-catering sector remained more pessimistic for the rest of the year.

2.19 Attraction providers (47%), also had a particularly positive outlook most positive sectors regarding expectations for the latter part of 2016.

2.20 Overall almost 3 in 10 (29%) of all tourism businesses expect domestic visitor volumes in 2016 to be better than the first half of 2015. The largest proportions of most sectors expect visitor volumes from Northern Ireland in 2016 to be up on the equivalent 2015 levels.

Positive outlook for the Republic of Ireland market

2.21 The outlook for visitors from the Republic of Ireland is largely positive with significant proportions of tourism operators within most sectors expecting visitor volumes to be up, or at least on a par with first half of 2016. However, self-catering had more than a third of businesses expecting decline.

2.22 Of all the accommodation providers, hotels were the most optimistic, well ahead of others.

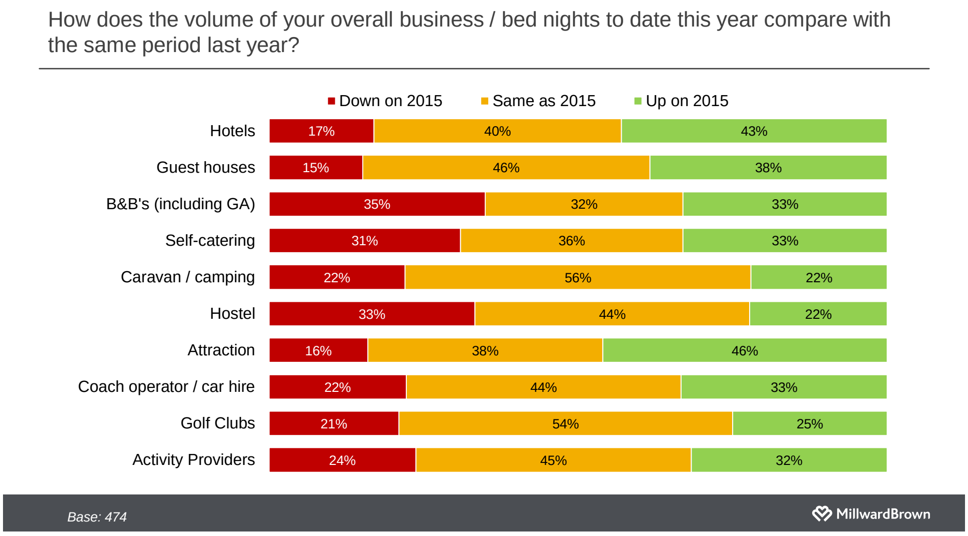
Good business expected from Great Britain and the overseas market

2.23 Growth from the Great Britain market is expected in the majority of sectors in June 2016. More than two fifths of all hotels (41%) expect visitor volumes from the Great Britain market to be up in the second half of 2016.

2.24 Expectations for the overseas market are also leaning towards growth. On balance all the paid serviced accommodation expect overseas business to be up on balance with the exception Caravan and Camping providers where there is more expectation of decline.

. Visitor Volumes in 2016 by Sector

Overall visitor volumes in 2016



**Some sectoral data is based on small sample sizes. Guesthouses (n=26), Car Hire and Coach Operators (n=9), Hostels (n=15), Caravan and Camping (n=9), Golf Clubs (n=24)*

In the charts, 'don't know' or 'not applicable' answers to the question have been excluded and the percentages re-based. Results are split by sector and shown in the same order each time.

Businesses not established since before the start of 2015 have not been asked questions on performance against the first half of last year, which they would not have been able to answer.

Growth not as great in 2016 for Northern Ireland

3.1 The above chart gives an overview of industry performance by sector in 2016.

3.2 Hotels enjoyed a solid first half in 2016, with over two fifths (43%) reporting increased visitor numbers compared with the same period in 2015. This was on top of a very strong performance at the same time last year, when more than 7 in 10 (73%) hotels reporting in uplift in visitor numbers.

3.3 Attractions would also appear to have had a slightly stronger year than other businesses so far in 2016. More than four in ten attractions (46%) reported an increase in visitor numbers compared with the previous year.

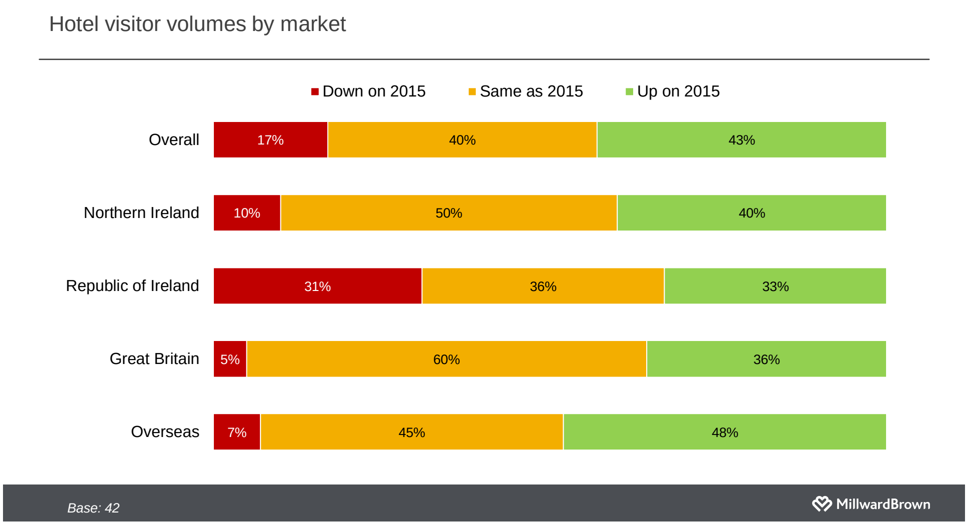
3.4 Guesthouses enjoyed a slightly less busy year, with just under four in ten (38%) reporting an increase in visitors, with a greater proportion (46%) reporting the same number of visitors as the previous year

3.5 The year so far was much more mixed for B&B's and self-catering operators. A third of B&B's (33%) and self-catering businesses (33%) reported an increase in visitors in 2016, but very similar proportions reported a decrease in visitors compared to 2015

3.6 Some other sectors experienced an even more challenging start to the year, especially hostel providers

Performance by sector is now discussed in more detail.

Hotels – visitor volumes by market



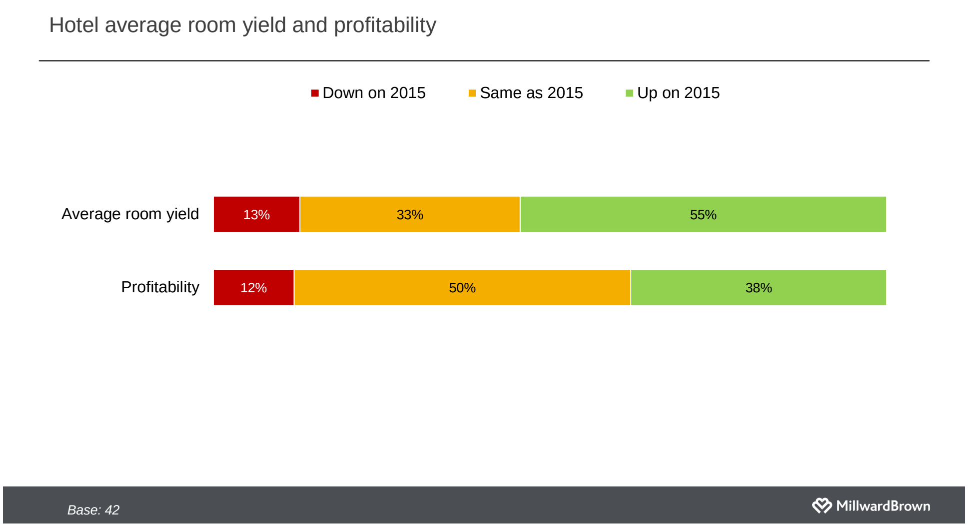
A comparatively strong start for hotel sector building on very strong growth in first half of 2015

3.7 Hotels enjoyed strong growth in 2015, which hasn't been seen quite to the same level in 2016, with just over 4 in 10 (compared to over 7 in 10 in 2015) seeing their visitor numbers rise. However while a few more than last year experienced a fall in visitor numbers across all markets, there was a much larger tendency to remain steady compared to last year. All markets did show some signs of growth, with more respondents still reporting increases greater than the level of decreases in visitor levels.

3.8 Perhaps unsurprisingly, the Republic of Ireland market still performed weakest, in the earlier part of the year, in relative terms, which may in part be due to unfavourable exchange rates. A third (33%) of hoteliers stated that the volume of visitors from the Republic of Ireland was up in 2016, however, a similar proportion (31%) reported a decrease in visitor numbers

3.9 The overseas market and domestic markets both performed a little more strongly with almost half of hoteliers citing an increase in visitor numbers from overseas (48%) and slightly less for Northern Ireland (40%). The Great Britain market, while showing a similar proportion with an uplift in the early part of 2016 as seen for ROI, had much fewer reporting a decline.

Hotels – average room yield and profitability

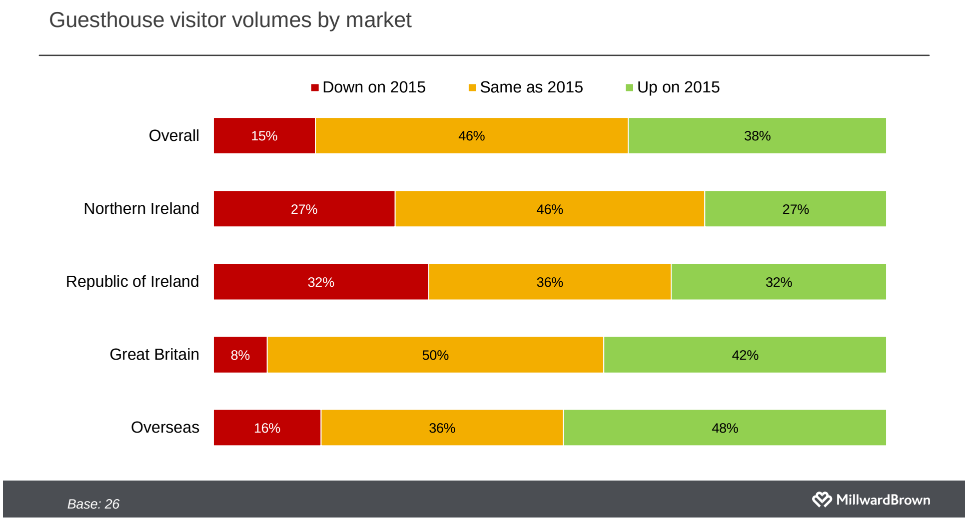


Relatively solid levels of room yield and profitability

3.10 Again growth wasn't as significant in 2016 as in the same period in 2015, which is reflected in an increase in profitability as reported by just over one third (38%) of respondents. However, the proportion reporting an increase in profits was still much higher than the numbers who experienced a decrease, with half of all hoteliers suggesting their profit levels were the same as last year.

3.11 Similarly, almost three fifths (55%) of hoteliers stated that average room yield increased on last year. Just over one in ten (13%) hotels reported a decrease in average room yield compared to 2015

Guesthouses



**The above results are based on a small sample size (n=26)*

Another positive year for the guesthouse market

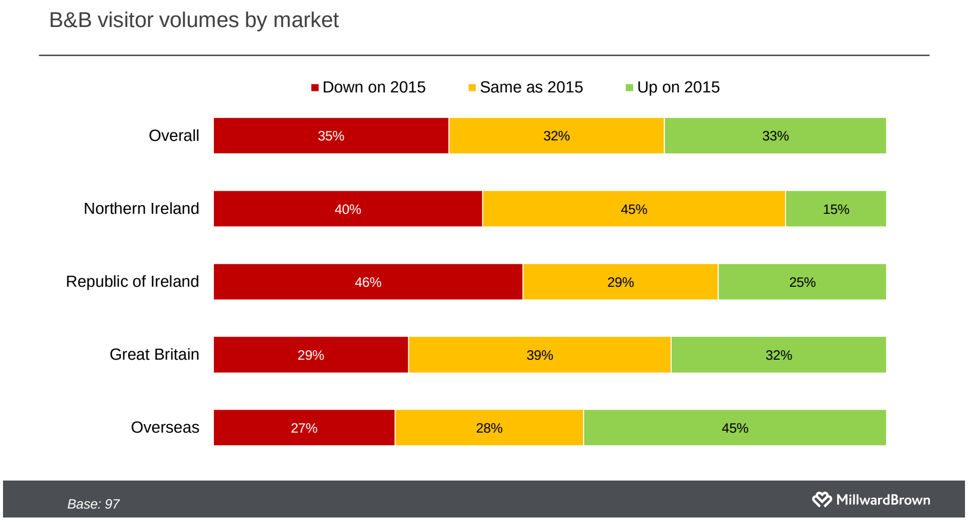
3.12 Guesthouses have seen a reasonably positive result in 2016, with two fifths (38%) of respondents reporting an increase in visitor volumes compared to 45% in 2015

3.13 This year the proportion of guesthouses reporting no change since this time last year has increased significantly from 30% to 46% suggesting a slowdown in growth but a more steady market, with a smaller proportion reporting a decline (15% compared to 25% in the same period in 2015).

3.14 Great Britain and the overseas markets all performed strongly with between two fifths and half of guesthouse owners citing an increase in visitor numbers.

3.15 The Republic of Ireland market performed weakest in relative terms so far this year with 3 in 10 (32%) stating a decrease in visitor volumes compared with 2015, although this decline was not just as dramatic as see last year when two fifths (42%) reported a decrease compared with 2014.

B&B's



B&B's continue to face challenges

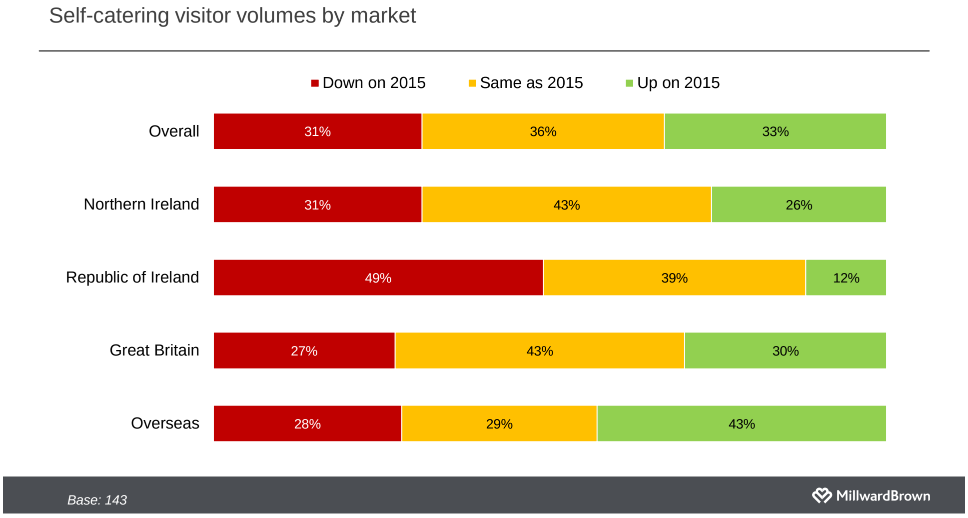
3.16 B&B operators continue to show mixed results in the first half of 2016. A third (33%) reported an increase in business in 2016. However, approximately the same proportion (35%) reported visitor volumes to be down compared with 2015.

3.17 Just under half (45%) of B&Bs reported that the domestic market was the same as in 2015, with two fifths (40%) reporting a decrease and just 3 in 20 (15%) citing an increase in visitor volumes.

3.18 Visitor volumes from the Republic of Ireland continue to struggle the most amongst key markets, with almost half (46%) of B&Bs reporting a decrease on the same period of 2015.

3.19 Positively, almost a third (32%) of B&Bs stated that their volume of business, from Great Britain and nearly half (45%) from the overseas market, had improved on last year. However a similar proportion reported a decline in the GB visitor market (29%), just slightly less than the number showing an increase.

Self-catering



Little material change for Self-catering sector

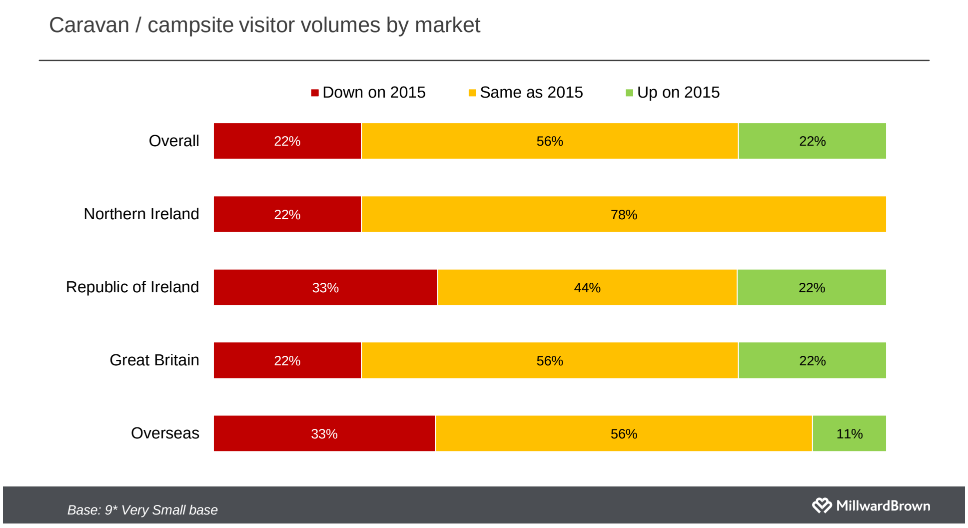
3.20 The self-catering sector maintained performance levels similar to that seen last year with around a third (33%) of operators reporting visitor volumes to increase compared to the same period of 2015

3.21 However a very similar proportion, around 3 in 10 (31%) reported a decline on the previous year.

3.22 The Republic of Ireland market is the main concern for self-catering businesses, with half of operators (49%) reporting a decrease in June 2016 compared with the first half of 2015. As per the reading taken this time last year, only a small number self-catering providers reported an increase in visitor numbers this year compared with 2015.

3.23 Overseas performed best across the markets with more than two fifths (43%) reporting an increase in relevant visitor numbers compared with the same period of 2015. This represents a moderate improvement in the market where 38% reported an increase in visitor numbers in June 2015 compared with the same period of the previous year.

Caravan / campsites



**The above results are based on a very small sample size (n=9)*

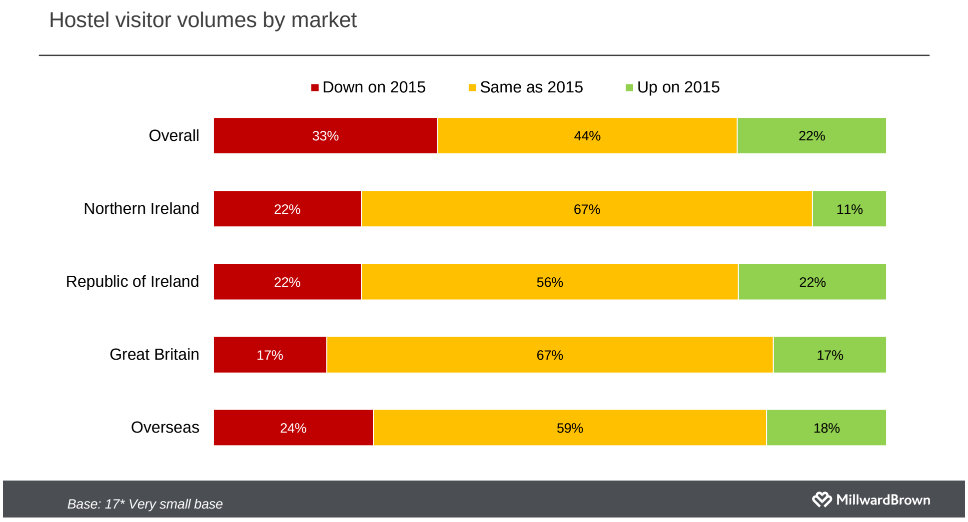
Reduced growth in caravan and camping sector

3.24 Compared to results seen in 2015, overall the caravan and camping sector performed more poorly when looking at the first half of 2016. Around a fifth (22%) of respondents reported an increase in visitor volumes compared to last year, with the exact same proportion reporting a reverse.

3.25 The domestic market saw no operators reporting an increase in visitor numbers compared with the same period of 2015.

3.26 The Republic of Ireland and overseas markets saw the largest decline with a third of operators reporting reduced visitor numbers in both cases.

Hostels



**The above results are based on a small sample size (n=17)*

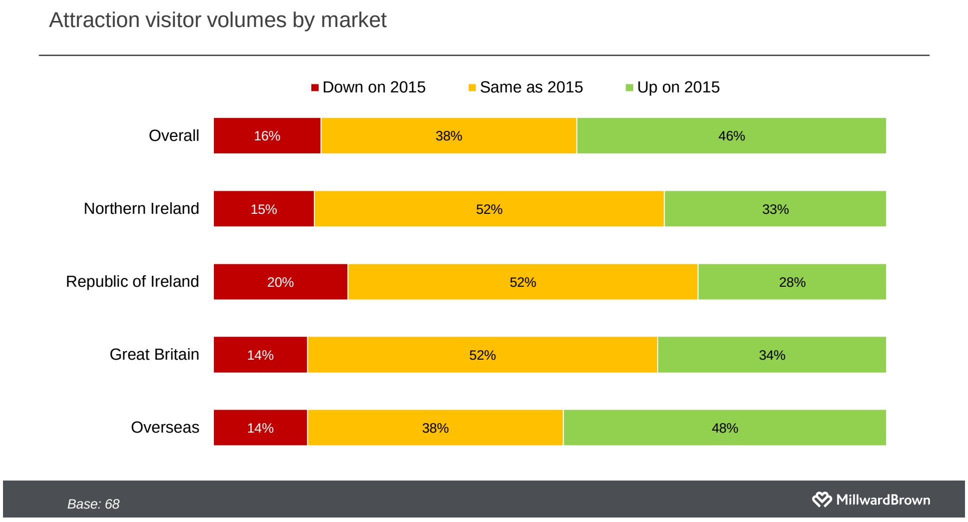
Slower start to the year for hostels

3.27 Overall, a fifth (22%) of hostel providers reported an uplift visitor volumes compared with the same period last year, although a greater number (33%) reported a decline. This performance was however, not just as strong as that seen in June 2015 where 41% of operators reported an increase in paying guests compared with the first half of 2014.

3.28 There was only a very marginal difference (when you take the very small sample sizes into account) across the key markets

3.29 The domestic market saw the lowest level of growth compared with the first half of 2015; 1 in 10 (11%) reported an increase and a further two thirds (67%) stated that visitor volumes remained on a par with the same period of 2015.

Attractions



Good growth for attractions

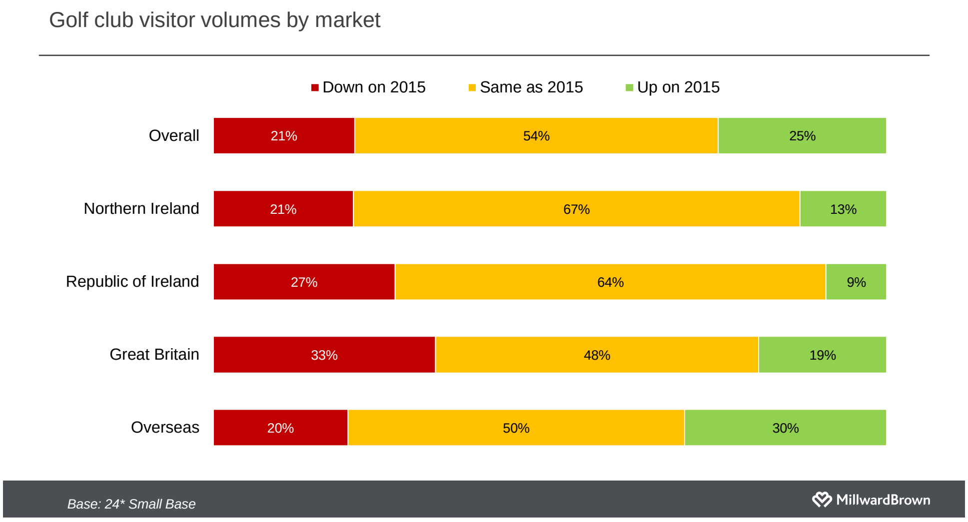
3.30 Overall, attraction providers enjoyed a reasonably positive start to the year, in the first half of 2016 around half (46%) reported an increase in visitor volumes on the levels achieved in first half of 2015.

3.31 All markets were up on balance, more respondents reported an increase in visitor volumes compared to those who reported a decrease on last year.

3.32 The overseas market performed strongest of the sectors under review with almost half (48%) of operators reporting an increase in visitor numbers, followed by the GB market which increased by a third

3.33 The Republic of Ireland market was the weakest performing market for attraction providers in June 2016; a fifth (20%) reported a decrease in visitor volumes and three in ten (28%) reported an increase.

Golf clubs



The above results are based on a small sample size (n=24)

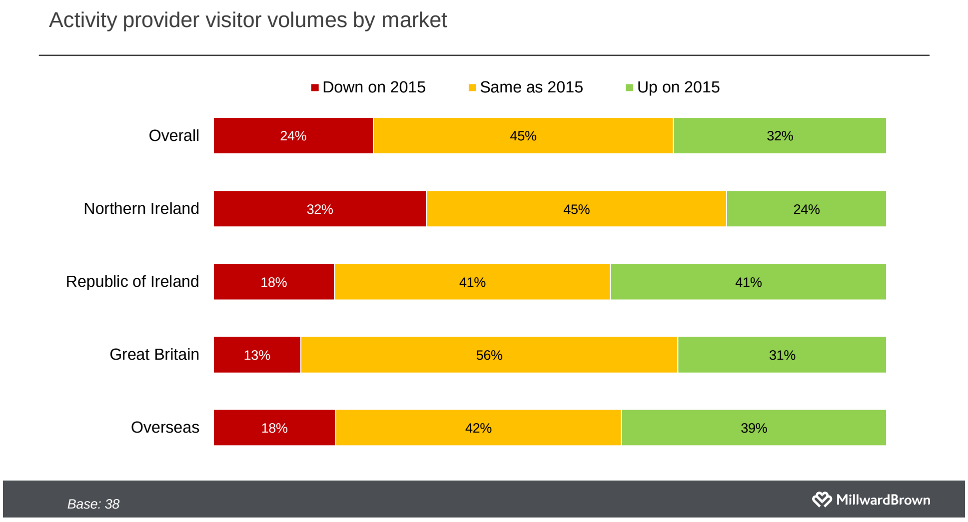
Weaker first half of the year for golf clubs

3.34 Overall, the first half of 2016 proved to be weaker for golf clubs than the same period of last year. In June 2016 only a quarter of operators reported uplift in business compared with the previous year. In June 2015 almost three fifths of operators (57%) reported an increase in visitor numbers. That being said the 2015 Irish open being hosted at Royal Co. Down is likely to have influenced a particularly strong period in the first part of 2015.

3.35 The Republic of Ireland market saw the lowest level of increase of the sectors being reviewed; only 1 in 10 (9%) reported an increase compared to the first half of the previous year.

3.36 The overseas markets performed best, with 3 in 10 (30%) reporting increases in 'green fee' visitor levels, while the GB market by comparison saw the biggest report in decline (33%).

Activity providers



**The above results are based on a small sample size (n=38)*

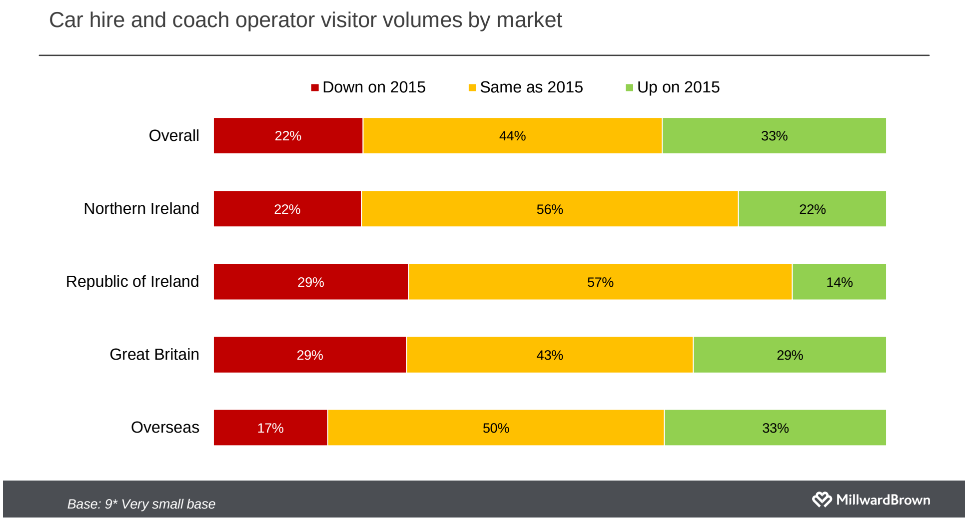
Improving picture for activity providers

3.37 More than three in ten (32%) activity providers reported an increase in visitor volumes in the first half of 2016, while around a quarter (24%) reported a decrease which represents an improved picture compared to the early part of 2015 when a larger proportion (32%) said they had experienced a decline from the first half of 2014.

3.38 The Northern Ireland market performed most poorly with a third (32%) citing a decrease in visitor volumes from this market.

3.39 The Republic of Ireland market has improved considerably with only a fifth (18%) citing a decrease in visitor volumes from this market. This represents is a considerable improvement compared with the early part of 2015 when almost half of operators reported a decline.

Car hire and coach operators



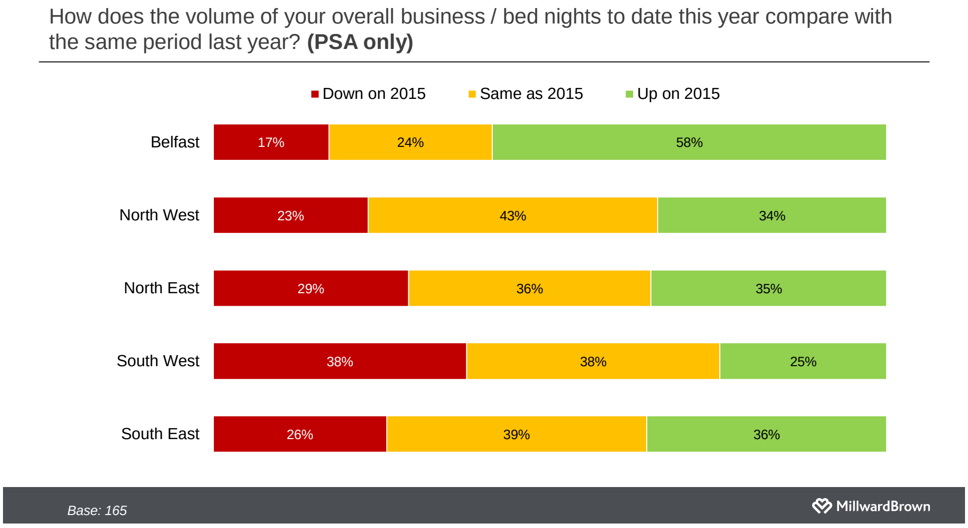
**The above results are based on a very small sample size (n=9)*

Little change for car hire and coach operators

3.40 Of the nine car hire and coach operators in the sample, three reported an increase in customers overall, four reported similar levels to the first half of 2015 and the remaining two reported a decrease.

4. Performance by Region

Paid Serviced Accommodation by Region



The above chart illustrates the business performance by region of the weighted paid serviced accommodation sector
Paid Serviced Accommodation (PSA): hotels, guesthouses and B&Bs

Strong improvement for Belfast

4.1 Operators in Belfast have enjoyed a strong 2016; almost three fifths (58%) of PSA respondents reported business to be up on the same period of last year.

Slightly more likely to see increases than decreases in the East

4.2 Approximately a third of respondents in the North East (35%) reported an increase in visitor levels in June 2016, down from that seen in the same period in June 2015 where the proportion reporting an increase compared to the first half of 2014 was 45%.

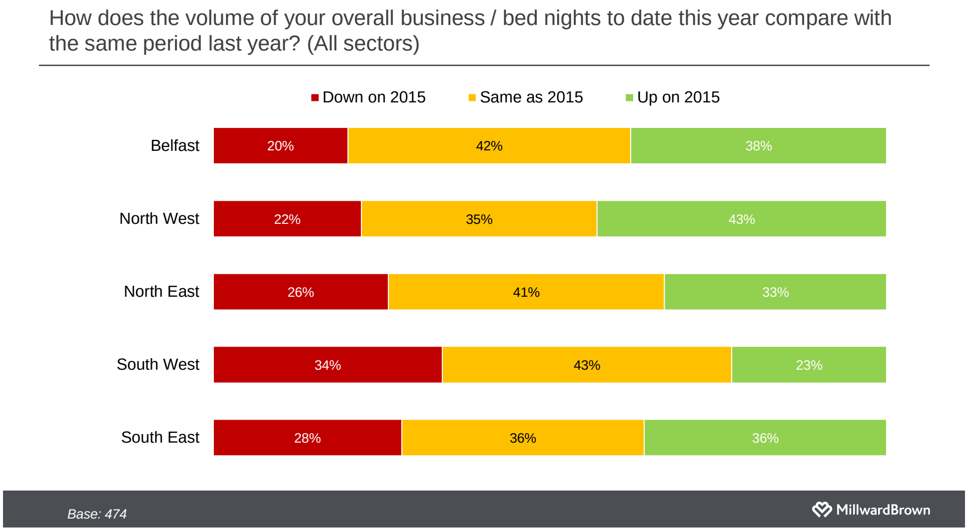
4.3 In the South East the proportion reporting an increase compared to the first half of 2015 was 36%, much greater that the number of reports of decreases in visitor numbers.

Difficulties continue in the West but showing some improvement

4.4 The South West of NI is still the weakest performing region with a quarter (25%) of PSA respondents reporting an increase while two fifths (38%) reported a decrease in business. However this is an improvement compared to the same period last year, when nearly three fifths were reporting a decrease on the year before to date.

4.5 The North West also sees a slightly more positive picture. In June 2015 the proportion reporting a decrease compared to the first half of 2014 was 36%. This has fallen to 23% in June 2016 comparing to the first half of 2015.

All Sectors by Region



The above chart illustrates the business performance by region for all sectors

Belfast not as strong overall

4.6 Overall while Belfast performs reasonably strongly in the year to date in 2016, it does not perform just as strongly as in 2015, with a smaller proportion (38%) reporting an improvement in performance for the year to date, compared to that seen at the same time in 2015, when the number reported an increase was 67%.

4.7 The picture was fairly similar in the North East, compared to last year, with just slightly more recording an increase rather than a decrease in performance.

4.8 The South East of NI also had a less positive start to 2016 with a third (36%) of respondents across all sectors reporting business to be up. In June 2015 almost half (48%) said that business improved overall compared to the early part of 2014.

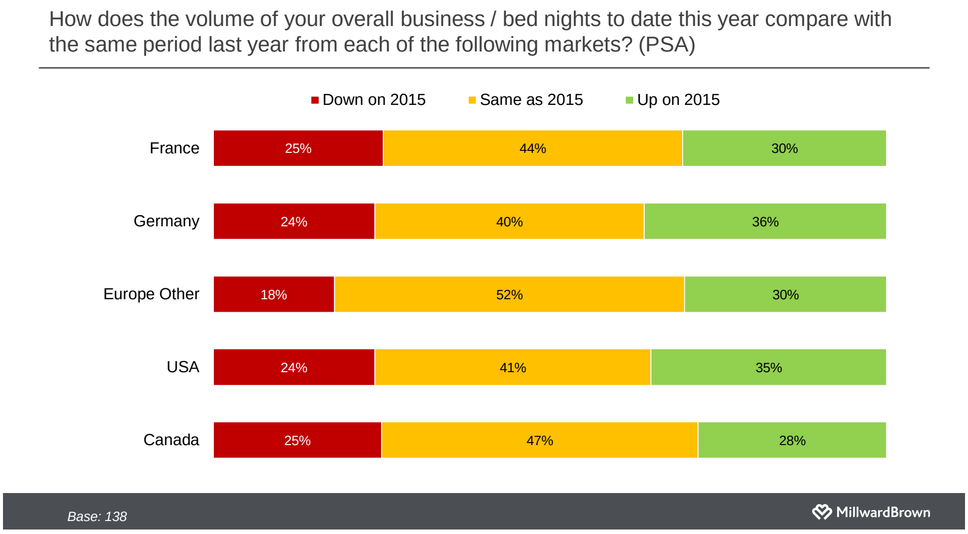
Mixed performance in the West

4.9 The picture in the South West is slightly more negative in June 2016 compared with the same period year; more than a third (34%) reported a decrease in overall business. The June 2015 figure compared to the first half of 2014 was 30%.

4.10 In this wave the best performing region was the North West with two fifths (43%) reporting an increase in overall business. This represents a significant increase as in June 2015 the equivalent figure was 27%.

5. Overseas Visitors by Market

Paid Serviced Accommodation



The above chart illustrates the business performance by overseas market of the weighted paid serviced accommodation sector

Strong growth in German and American visitors

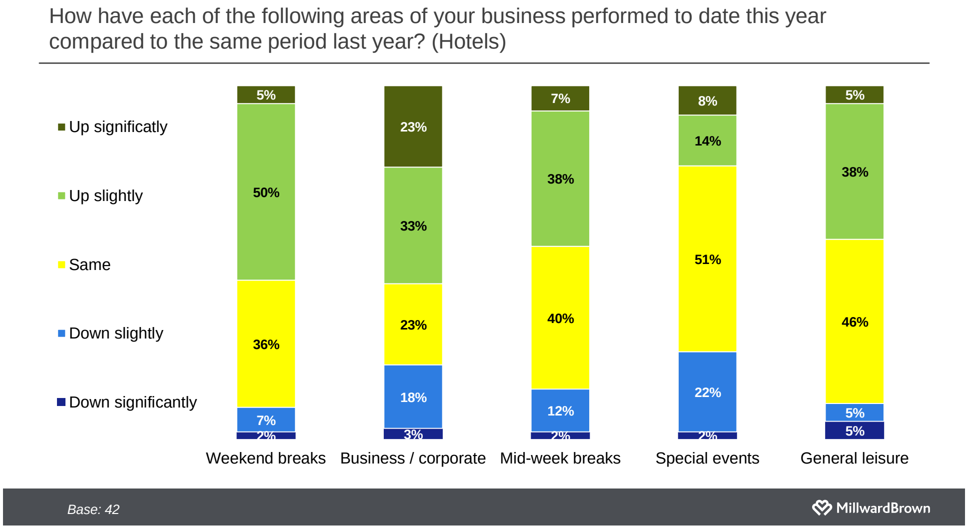
5.1 More than a third of PSA operators reported a growth in visitors from USA (35%) and Germany (36%).

Relatively positive performance in other markets

5.2 All other overseas markets were also slightly up on balance, more respondents reported an increase in visitor volumes compared to those who reported a decrease on last year.

6. Visitor Types (Hotels)

Hotel Visitor Types



The above questions were asked only to hotels

Business & weekend breaks trips take the lead

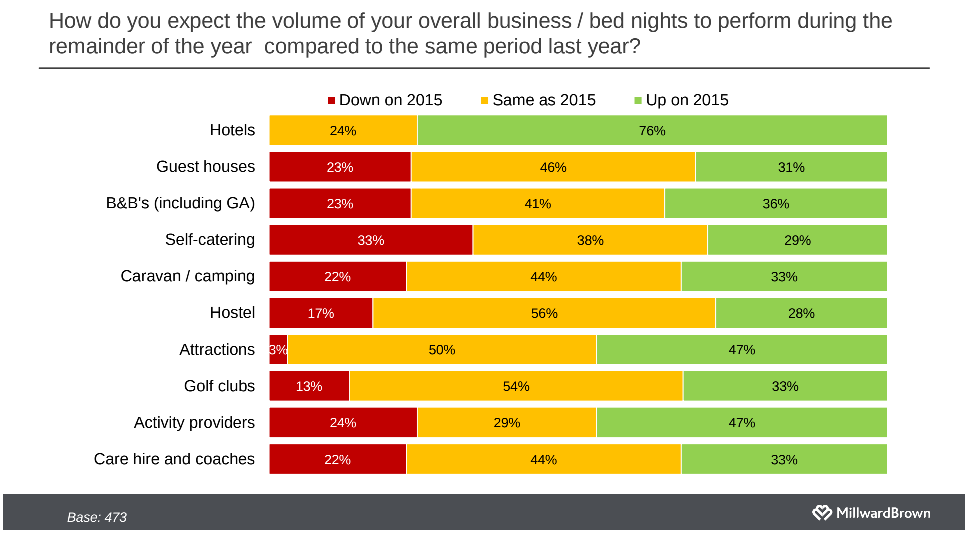
6.1 The business/corporate market has done particularly well, as has weekend breaks. In both cases more than half (56% and 55% respectively) of respondents reported an increase (either significant or slight). For Business and Corporate, the figures aren't quite as high seen for the same period last year, and for Weekend Breaks, there was a lesser proportion experiencing a significant uplift, but seeing rather more slight increases.

General leisure and midweek breaks going strong

6.2 General leisure and midweek breaks also fared very well. In June 2016 more than two fifths of all hoteliers reported an increase in relevant guests within these markets (45% and 43% respectively), most reporting slight increases however.

7. Expectations for 2016

Overall view of expectations



**Some sectoral data based on small sample sizes. Guesthouses (n=26), Car Hire and Coach Operators (n=9), Hostels (n=15), Caravan and Camping (n=9), Golf Clubs (n=24)*

In the charts, 'don't know' or 'not applicable' answers to the question have been excluded and the percentages re-based.

Mixed expectations for remainder 2016

7.1 Overall, Tourism operators have an optimistic outlook for the remainder 2016; around two fifths (39%) expect business to be up on 2015.

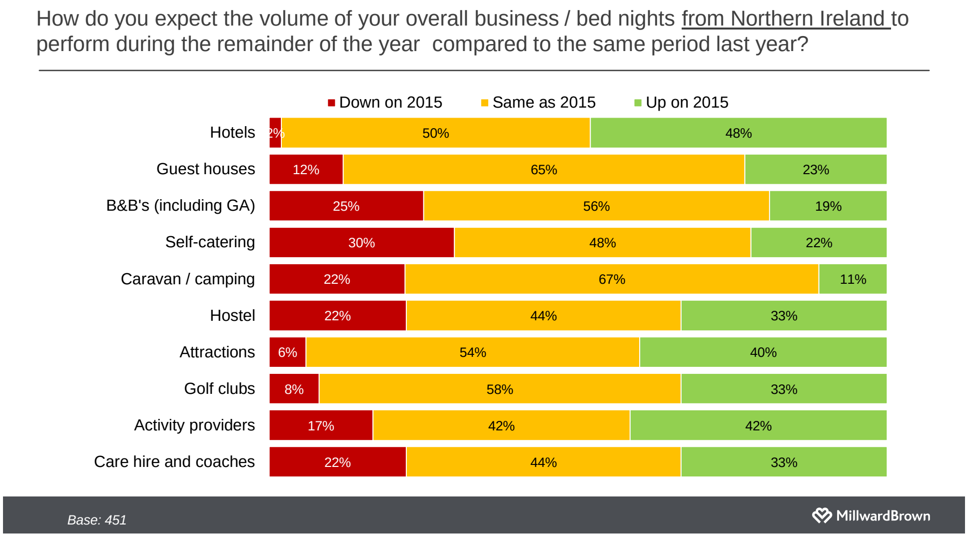
7.2 Following on from a very strong year in 2015, hotels remain positive for the remainder of 2016 with more than three quarters (76%) expecting business to be up.

7.3 Otherwise attractions and activity providers were the most positive regarding expectations for 2016. Almost half of attraction providers (47%), and the exact same proportion of activity providers (47%) expect increased visitor volumes in the rest of the year.

7.4 Some accommodation providers are not as optimistic, particularly self-catering operators. A third of self-catering operators said they expect their performance in the rest of 2016 to decline compared to 2015.

7.5 It is important to note, though, that while some predictions may be based on advanced bookings, this is not always the case and some predictions are more speculative.

Expectations for Northern Ireland



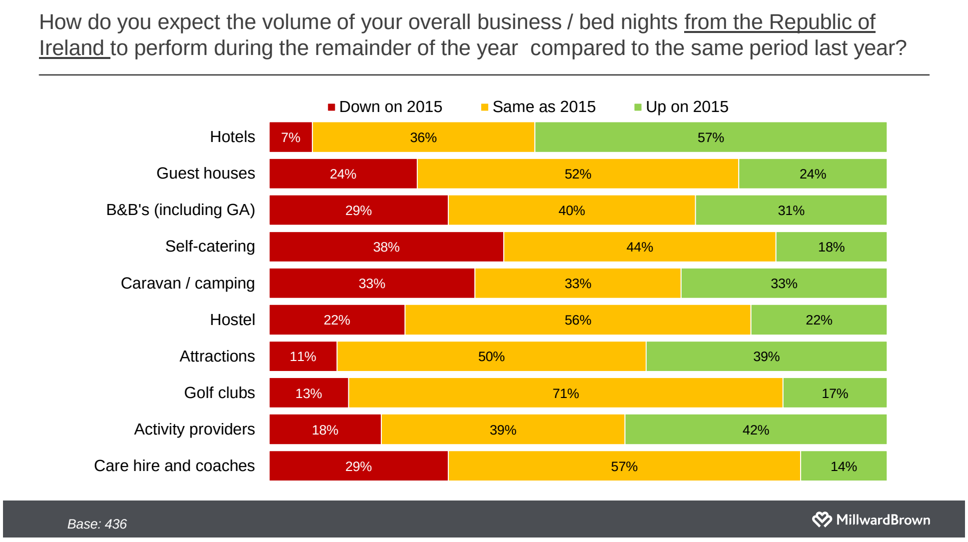
Positive expectations for the domestic market

7.6 Overall almost 3 in 10 (29%) of all tourism businesses expect domestic visitor volumes in the rest of 2016 to be better than the same period of 2015.

7.7 Significant proportions of all hotels (48%), hostels (33%), attractions (40%), golf clubs (33%), activity providers (42%) and car hire / coach operators (33%) expect an increase in the domestic market in 2016.

7.8 B&Bs, Guesthouses, self-catering and caravan and camping providers were the most pessimistic sectors; only around a fifth of all these businesses expected domestic visitor volumes to be up in the rest of 2016, compared to the same period of 2015.

Expectations for the Republic of Ireland



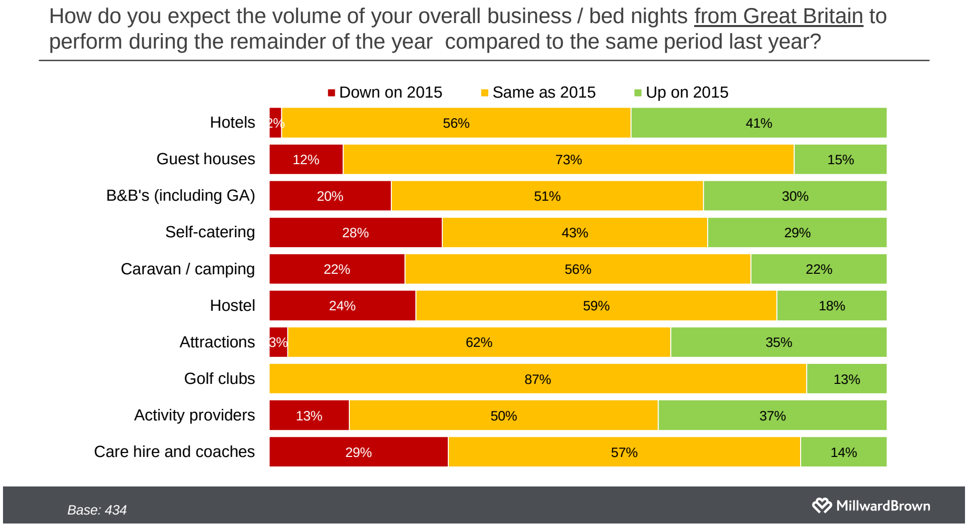
Positive outlook for the Republic of Ireland market

7.10 The outlook for visitors from the Republic of Ireland is largely positive with significant proportions of tourism operators within most sectors expecting visitor volumes to be up, or at least on a par with 2015.

7.11 Hotels, attractions and activity providers were most optimistic about the remainder of the year. 57%, 39% and 42% respectively indicated that they thought their business from ROI may improve in the second half of 2016.

7.12 Self-catering companies were the most pessimistic; with nearly 4 in 10 predicting a decrease in business from the Republic of Ireland market, much greater than the proportion forecasting an increase.

Expectations for Great Britain



Good business expected from Great Britain

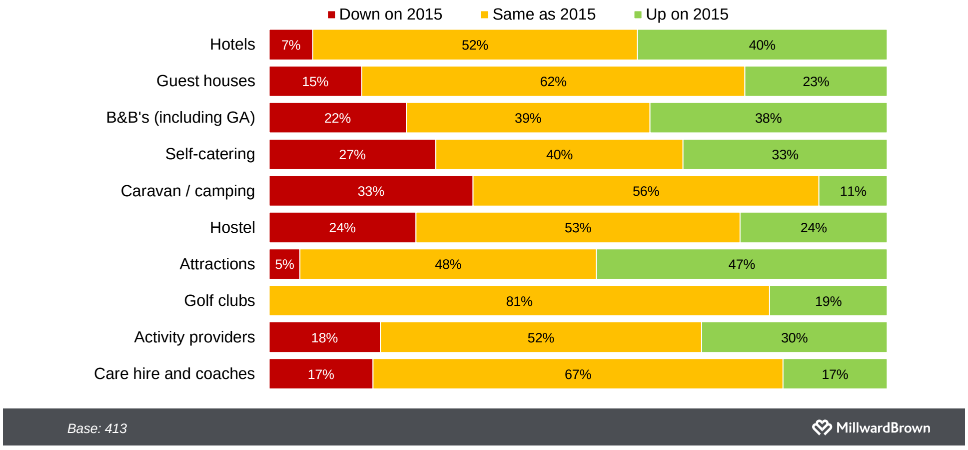
7.13 More than two fifths of all hotels (41%) expect visitor volumes from the Great Britain market to be up in the rest of 2016, compared to the same period of 2015, though not as optimistic as in the same period last year (at 61%).

7.14 Otherwise attractions and activity providers are the most optimistic with regards to the GB market. More than a third in both expected business to be up in the second half of 2016.

7.15 Golf clubs are the least optimistic; only 1 in 10 expected GB business to increase in the remainder of 2016 but on the other hand, none were predicting a decrease.

Expectations for Overseas

How do you expect the volume of your overall business / bed nights from overseas to perform during the remainder of the year compared to the same period last year?

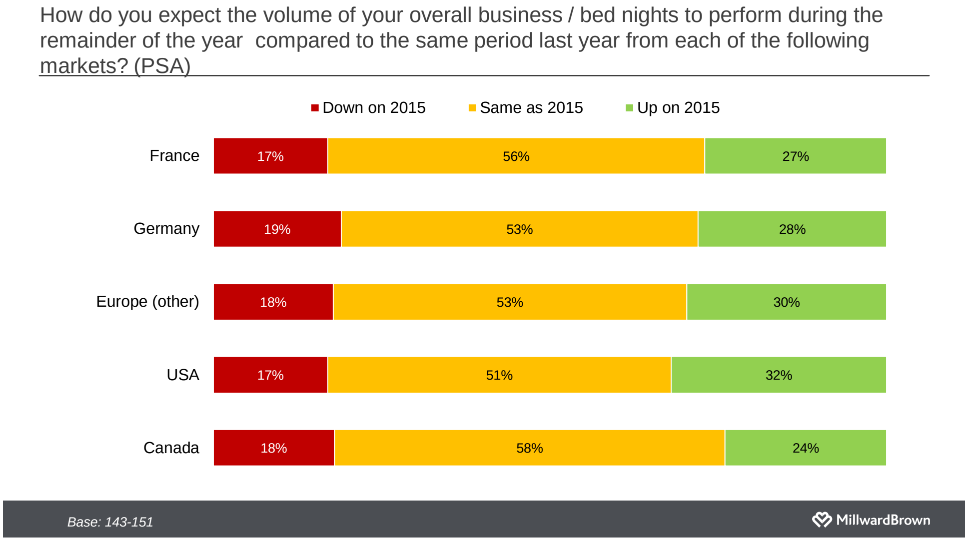


On balance growth expected from the overseas market

7.16 Expectations for the overseas market are also leaning towards growth. On balance with the exception of Caravan & Camping outlets all organisations surveyed expect business to be up on balance with at least a third of hotels, B&Bs, self-catering providers and attractions predicting increased visitor volumes.

7.17 Caravan & Camping outlets are the most pessimistic about the remainder of the year; with only around 1 in 10 (11%) predicting an increase compared to the same period of 2015, while a third (33%) predicted a reverse.

Expectations for Overseas – Specific Markets (All PSA) only



Some growth expected from the overseas market

7.19 Expectations for the overseas market are also leaning towards growth. On balance all were more likely to predict growth than not, although significant proportions think business will roughly the same as the second half of 2015. The most positive expectation is in relation to visitors from USA.

Appendix – Analysis of Sample

Sampling

The table below shows the sample split by sector and interview methodology:

Sector	Online Survey Responses	Telephone Top-up Surveys	Total Sample Size
Hotels	7	36	43
Guesthouses	3	25	28
Bed & Breakfast	44	58	102
Self-catering	121	40	161
Caravan & campsites	4	5	9
Hostels	4	14	18
Attractions	20	50	70
Golf clubs	1	24	25
Activity providers	8	30	38
Coach operators/Car hire	1	8	9
Total	**213**	**290**	**503**

Weighting

Figures quoted in the report for the 'paid serviced accommodation' sector have been weighted according to the relative number of bedrooms available in Northern Ireland in the hotel, guesthouse and B&B sectors:

Sector	Available bedrooms in Northern Ireland	Weighting applied to PSA figures
Hotels	7,708	73.0%
Guesthouses	888	8.4%
Bed & Breakfast	1,961	18.6%