



# Hotel Performance

## January-December 2023

*Data are compared against pre-pandemic figures in January-December 2019.*

*All figures correct as of 20/02/2024.*

*YTD = Year-to-date.*

*Bed-space occupancy figures have been calculated excluding those who have not provided the appropriate breakdown of information.*

**Source: NISRA**

# Hotel Performance - NI

# January-December 2023

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January-December 2023 indicate hotel room and bed occupancy experienced minor decreases compared with the same pre-pandemic period. Year-to-date sales were below those achieved during January-December 2019. Room occupancy for the month of December 2023 fell by 3 percentage points and room sales declined by 12% compared to December 2019.

### YTD Room Occupancy

# 65%

▼ -2pps vs Jan-Dec 2019

### YTD Bed Occupancy

# 53%

▼ -2pps vs Jan-Dec 2019

### YTD Room Sales

# 2,089,123

▼ -10% vs Jan-Dec 2019

### YTD Bed Sales

# 3,843,412

▼ -3% vs Jan-Dec 2019

### Room and Bed Occupancy

- Northern Ireland (NI) year-to-date (YTD) hotel room and bed occupancy figures sit at 65% and 53% respectively. These figures are just below the 2019 rates, with a 2 percentage point fall in both room and bed occupancy in 2023.
- Looking at individual monthly performance, room occupancy in December 2023 (51%) was down by 3 percentage points compared to December 2019. December room occupancy in 2023 increased by 2 percentage points compared to last month (November 2023 – 49% room occupancy).
- NI's 2023 YTD hotel room occupancy is 1 percentage point lower than in January-December 2022.

### Room and Bed Sales

- YTD room sales remain 10% below January-December 2019, which is 1 percentage point less than the figure reported last month.
- Room sales in December 2023 decreased by 12% compared to December 2019, following monthly falls in room sales in September and October 2023 vs 2019.
- YTD bed sales for January-December 2023 decreased by 3% compared with 2019.
- Bed sales in December 2023 decreased by 1% on 2019. This follows on from an 11% fall in bed sales in November 2023 v November 2019.
- Compared to 2022, January-December 2023 room and bed sales are 9% and 4% down, respectively.

Performance during January-December 2023 varied across NI's Local Government Districts (LGD).



## Hotel Performance

### January-December 2023

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**Hotel room and bed occupancy by Local Government District (January-December 2023)**

Local Government District	Room Occupancy	Change vs 2019	Bed Occupancy	Change vs 2019
Antrim and Newtownabbey	58%	+1pps	43%	+2pps
Ards and North Down	*	*	*	*
Armagh City, Banbridge and Craigavon	*	*	*	*
Belfast City	70%	-2pps	58%	+1pps
Causeway Coast and Glens	63%	-4pps	48%	+4pps
Derry City and Strabane	67%	+1pp	56%	+8pps
Fermanagh and Omagh	63%	-5pps	47%	-8pps
Lisburn and Castlereagh	*	*	*	*
Mid and East Antrim	*	*	*	*
Mid Ulster	*	*	*	*
Newry, Mourne and Down	*	*	*	*

\* = sample size too small to provide a reliable estimate.

†pps = percentage points

**Source: NISRA**

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January-December 2023 indicate that guesthouses, guest accommodation and B&Bs (GH/GA/BB) experienced increases in both room occupancy and sales compared to 2019 and 2022 figures. Performance suggests this sector is continuing to progress better in its recovery than hotels.



## GH/GA/BB Performance

January-December  
2023

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*Bed-space occupancy figures have been calculated excluding those who have not provided the appropriate breakdown of information.*

**Source: NISRA**

YTD Room Occupancy

**38%**

▲ +5pps vs Jan-Dec 2019

YTD Bed Occupancy

**33%**

▲ +8pps vs Jan-Dec 2019

YTD Room Sales

**533,457**

▲ +16% vs Jan-Dec 2019

YTD Bed Sales

**1,019,390**

▲ +23% vs Jan-Dec 2019

### Room and Bed Occupancy

- NI guest houses, guest accommodation and B&Bs (GH/GA/BB) had a positive January-December 2023 period, with room and bed occupancy increasing by 5 and 8 percentage points respectively compared to 2019.
- Looking at individual monthly performance, room occupancy in the month of December 2023 increased by 6 percentage points compared to the same month in 2019.
- GH/GA/BB room and bed occupancy both fell by 3 percentage points compared to last month (November).
- Guesthouse and guest accommodation recorded room occupancy rates of 44% and 45% respectively for the period January-December 2023, while B&B's recorded a lower room occupancy of 26%.

### Room and Bed Sales

- More than 533,000 rooms and just over 1 million bed spaces were sold in guest houses, guest accommodation and B&Bs in January-December 2023.
- This represents growth of 16% and 23% respectively compared to January-December 2019.
- Looking at individual monthly performance, room sales in December 2023 increased by 27% compared to December 2019. This follows an increase of 30% in November 2023 compared with the same month in 2019.
- GH/GA/BB room sales for January-December 2023 are 4% lower than room sales in the same period in 2022.

Room and bed-space occupancy varied across Local Government Districts (LGDs) during January-December 2023. Belfast City LGD recorded the highest room occupancy (60%), while Lisburn and Castlereagh recorded the largest increase in room occupancy compared with January-December 2019 (+13pps).



## GH/GA/BB Performance

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*Bed-space occupancy figures have been calculated excluding those who have not provided the appropriate breakdown of information.*

**Source: NISRA**

**GH/GA/BB room and bed-space occupancy by Local Government District (January-December 2023)**

Local Government District	Room Occupancy	Change vs 2019	Bed Occupancy	Change vs 2019
Antrim and Newtownabbey	*	*	*	*
Ards and North Down	*	*	*	*
Armagh City, Banbridge and Craigavon	32%	+6pps	25%	+5pps
Belfast City	60%	+8pps	48%	+7pps
Causeway Coast and Glens	37%	+11pps	34%	+14pps
Derry City and Strabane	37%	+2pps	35%	+10pps
Fermanagh and Omagh	36%	+1pps	27%	+2pps
Lisburn and Castlereagh	43%	+13pps	33%	+8pps
Mid and East Antrim	22%	-10pps	25%	+1pps
Mid Ulster	*	*	*	*
Newry, Mourne and Down	36%	+11pps	27%	+7pps

\*Bed-space occupancy figures have been calculated excluding those who have not provided the appropriate breakdown of information.

†pps = percentage points