



# Hotel Performance

## January-July 2023

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

*All figures correct as of 07/09/2023.*

*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-July 2023

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January-July 2023 indicate hotel room occupancy experienced a minor increase while bed occupancy declined marginally compared with the same period pre-pandemic. Year-to-date room sales have decreased in January-July 2023 compared with 2019. Room occupancy for July 2023 fell by 4 percentage points and room sales declined by 12% compared to July 2019.

YTD Room Occupancy

**67%**

No change vs Jan-July 2019

YTD Bed Occupancy

**52%**

▼ -2pps vs Jan-July 2019

YTD Room Sales

**1,245,906**

▼ -6% vs Jan-July 2019

YTD Bed Sales

**2,207,109**

▼ -2% vs Jan-July 2019

### Room and Bed Occupancy

- Northern Ireland (NI) year-to-date (YTD) hotel room and bed occupancy figures sit at 67% and 52% respectively. These figures represent no change in room occupancy and a 2 percentage point decline in bed occupancy compared to 2019.
- Looking at individual monthly performance, room occupancy in July 2023 (76%) was down by 4 percentage points compared to July 2019. Room occupancy in July 2023 also decreased by 5 percentage points compared to last month (June 2023 – 81% room occupancy).
- NI's 2023 YTD hotel room occupancy is 3 percentage points higher than last year (January-July 2022).

### Room and Bed Sales

- Room sales in the month of July 2023 declined by 12% compared to July 2019. We had previously seen a monthly decrease in room sales in May and June 2023 vs 2019.
- YTD room sales remain 6% below January-July 2019. This is one percentage point lower than the figure reported in last month's report.
- Bed sales in July 2023 decreased by 8% on 2019. This followed from a 2% decline in bed sales reported in June 2023 on the 2019 figure.
- YTD bed sales for January-July 2023 decreased by 2 percentage points compared with 2019.
- Compared to last year (2022), January-July 2023 room and bed sales are both 3% below 2022 levels.



## Hotel Performance

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Source: NISRA

Performance during January-July 2023 varied across NI Local Government Districts (LGD). Belfast City recorded the highest room occupancy of all the NI LGDs (74%) and was the only reporting LGD to experience a growth in YTD room occupancy compared to 2019.

Hotel room and bed occupancy by Local Government District January-July 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	59%	-6pps	35%	+2pps
Belfast City	74%	+5pps	59%	+3pps
Causeway Coast and Glens	64%	-6pps	47%	+3pps
Derry City and Strabane	66%	-1pps	56%	+7pps
Fermanagh and Omagh	60%	-9pps	43%	-12pps
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

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January-July 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

YTD Room Occupancy

**38%**

▲ +5pps vs Jan-July 2019

YTD Bed Occupancy

**33%**

▲ +7pps vs Jan-July 2019

YTD Room Sales

**305,879**

▲ +19% vs Jan-July 2019

YTD Bed Sales

**601,372**

▲ +28% vs Jan-July 2019

### Room and Bed Occupancy

- Northern Ireland guest houses, guest accommodation and B&Bs (GH/GA/BB) have had a positive January-July 2023 period, with room occupancy experiencing growth of 5 percentage points compared to 2019. Bed occupancy has seen larger growth of 7 percentage points.
- Looking at individual monthly performance, room occupancy in the month of July 2023 experienced growth of 2 percentage points compared to the same month in 2019, marking the seventh consecutive month of growth vs 2019.
- GH/GA/BB room occupancy has increased by 3 percentage points, while bed occupancy has decreased by 2 percentage points, in comparison to last month (June 2023).

### Room and Bed Sales

- There have been over 305,000 rooms and more than 601,000 bed spaces sold in guest houses, guest accommodation and B&Bs in January-July 2023.
- NI GH/GA/BB room sales for January-July 2023 have increased by 19% compared to January-July 2019.
- Looking at individual monthly performance, room sales in July 2023 grew by 8% compared to July 2019. This follows on from increases of 18% in June, 10% in May, 18% in April, 26% in March, 13% in February 2019, and 73% in January 2019.
- Compared to last year (January-July 2022), GH/GA/BB room sales have increased by 3% in 2023.

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

Room and bed-space occupancy varied across Local Government Districts (LGDs) during January-July 2023. Belfast City LGD recorded the highest room occupancy (54%), while Lisburn & Castlereagh LGD and Causeway Coast and Glens LGD both recorded the largest increases in room occupancy compared with January-July 2019 (+12pps).



## GH/GA/BB Performance

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Source: NISRA

**GH/GA/BB room and bed-space occupancy by Local Government District January-July 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	29%	+4pps	25%	+5pps
Belfast City	54%	+4pps	44%	+1pps
Causeway Coast and Glens	38%	+12pps	36%	+14pps
Derry City and Strabane	40%	+5pps	33%	+4pps
Fermanagh and Omagh	34%	-2pps	33%	+8pps
Lisburn and Castlereagh	39%	+12pps	31%	+8pps
Mid and East Antrim	27%	-5pps	24%	+1pps
Mid Ulster	*	*	*	*
Newry, Mourne and Down	41%	+13pps	28%	+7pps

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

† pps = percentage points