



Hotel Performance

January-October 2023

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

All figures correct as of 14/12/2023.

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-October 2023

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January-October 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-October 2019. Room occupancy for the month of October 2023 fell by 3 percentage points and room sales declined by 12% compared to October 2019.

YTD Room Occupancy

68%

▼ -1pp vs Jan-Oct 2019

YTD Bed Occupancy

54%

▼ -1pps vs Jan-Oct 2019

YTD Room Sales

1,817,175

▼ -8% vs Jan-Oct 2019

YTD Bed Sales

3,290,023

▼ -2% vs Jan-Oct 2019

Room and Bed Occupancy

- Northern Ireland (NI) year-to-date (YTD) hotel room and bed occupancy figures sit at 68% and 54% respectively. These figures represent a 1 percentage point fall in both room and bed occupancy compared to 2019.
- Looking at individual monthly performance, room occupancy in October 2023 (64%) was down by 3 percentage points compared to October 2019. October room occupancy this year decreased by 5 percentage points compared to last month (September 2023 – 69% room occupancy).
- NI's 2023 YTD hotel room occupancy is 1 percentage point higher than last year (January-October 2022).

Room and Bed Sales

- YTD room sales remain 8% below January-October 2019, which is the same as the figure reported last month.
- Room sales in October 2023 decreased by 12% compared to October 2019, following monthly decreases in room sales in August and September 2023 vs 2019.
- YTD bed sales for January-October 2023 decreased by 2% compared with 2019.
- Bed sales in October 2023 increased by 1% on 2019. This follows on from a 1% growth in bed sales in September 2023 v September 2019.
- Compared to last year (2022), January-October 2023 room and bed sales are 12% and 5% down, respectively.

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



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Hotel room and bed occupancy by Local Government District (January-October 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	*	*	*	*
Belfast City	73%	No change	60%	+2pps
Causeway Coast and Glens	66%	-6pps	50%	+4pps
Derry City and Strabane	70%	+1pp	58%	+8pps
Fermanagh and Omagh	65%	-6pps	48%	-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

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January-October 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-October 2023

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Source: NISRA

YTD Room Occupancy

40%

▲ +4pps vs Jan-Oct 2019

YTD Bed Occupancy

34%

▲ +6pps vs Jan-Oct 2019

YTD Room Sales

466,414

▲ +15% vs Jan-Oct 2019

YTD Bed Sales

896,905

▲ +21% vs Jan-Oct 2019

Room and Bed Occupancy

- Northern Ireland (NI) guest houses, guest accommodation and B&Bs (GH/GA/BB) have had a positive January-October 2023 period, with room and bed occupancy experiencing an increase of 4 and 6 percentage points respectively compared to 2019.
- Looking at individual monthly performance, room occupancy in the month of October 2023 increased by 7 percentage points compared to the same month in 2019, following an increase of 6 percentage points in September 2023 v September 2019.
- GH/GA/BB room occupancy decreased by 8 percentage points in comparison to last month (September 2023), while bed occupancy fell by 5 percentage points.

Room and Bed Sales

- More than 466,000 rooms and around 897,000 bed spaces were sold in guest houses, guest accommodation and B&Bs in January-October 2023.
- This represents growth of 15% and 21% respectively compared to January-October 2019.
- Looking at individual monthly performance, room sales in October 2023 increased by 17% compared to October 2019. This follows an increase of 18% in September 2023 compared with the same month in 2019.
- GH/GA/BB room sales for January-October 2023 are 8% higher than room sales in the same period last year (January-October 2022).

Room and bed-space occupancy varied across Local Government Districts (LGDs) during January-October 2023. Belfast City LGD recorded the highest room occupancy (57%), while Lisburn and Castlereagh recorded the largest increase in room occupancy compared with January-October 2019 (+16pps).



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-October 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	34%	+6pps	27%	+4pps
Belfast City	57%	+2pps	48%	+1pps
Causeway Coast and Glens	40%	+11pps	37%	+12pps
Derry City and Strabane	42%	+5pps	37%	+6pps
Fermanagh and Omagh	37%	No change	28%	+1pps
Lisburn and Castlereagh	46%	+16pps	36%	+9pps
Mid and East Antrim	25%	-9pps	28%	+1pps
Mid Ulster	*	*	*	*
Newry, Mourne and Down	40%	+12pps	28%	+7pps

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

†pps = percentage points