



Hotel Performance

January-October 2022

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

All figures correct as of 13/12/2022.

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 2022

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January-October 2022 indicate hotel room and bed occupancy each experienced a decline compared with the same period pre-pandemic. Year-to-date room sales also decreased slightly in 2022 compared with 2019, while bed sales remained unchanged. Room occupancy for the month of October 2022 was also unchanged from October 2019.

YTD Room Occupancy

67%

▼ -2pps vs Jan-Oct 2019

YTD Bed Occupancy

51%

▼ -4pps vs Jan-Oct 2019

YTD Room Sales

1,927,985

▼ -3% vs Jan-Oct 2019

YTD Bed Sales

3,394,771

No change vs Jan-Oct 2019

Room and Bed Occupancy

- Northern Ireland (NI) hotel room occupancy for January-October 2022 is 2 percentage points down on January-October 2019, unchanged from the decline reported in the previous three year-to-date accommodation reports.
- Looking at individual monthly performance, room occupancy in October 2022 (68%) was unchanged when compared to October 2019. Last month (September) had seen an increase in occupancy compared to pre-pandemic times.
- 2022 year-to-date (YTD) hotel bed occupancy figures are 4pps behind January-October 2022, a small improvement on the figure reported in last month's report.

Room and Bed Sales

- Room sales in the month of October 2022 are on par with sales in the same month in 2019.
- As a result, 2022 YTD room sales remain 3% below pre-pandemic figures. This is the same difference in YTD occupancy as reported in last month's report.
- Following on from a 2pps increase in September 2022, bed sales in October experienced growth of 6pps on the same month in 2019.
- YTD bed sales continue to remain on par with 2019 levels. This also mirrors the 'no change' reported in the two previous Accommodation Performance reports.



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Source: NISRA

Hotel Performance - NI

January-October 2022

Performance during January-October 2022 varied across NI Local Government Districts (LGD). Belfast City recorded the highest room occupancy of all the NI LGDs (71%), and was also the closest to pre-pandemic room occupancy levels (-1 percentage points) of all the LGDs.

Hotel room and bed occupancy by Local Government District January-October 2022

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	71%	-1pp	53%	-5pps
Causeway Coast and Glens	67%	-4pps	48%	+2pps
Derry City and Strabane	66%	-3pps	53%	+4pps
Fermanagh and Omagh	62%	-8pps	57%	+1pp
Lisburn and Castlereagh	*	*	*	*
Mid and East Antrim	69%	-2pps	55%	-5pps
Mid Ulster	*	*	*	*
Newry, Mourne and Down	58%	-2pps	50%	+5pps

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

**pps = percentage points

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



GH/GA/BB Performance

January-October 2022

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Source: NISRA

YTD Room Occupancy

38%

▲ +2pps vs Jan-Oct 2019

YTD Bed Occupancy

29%

▲ +1pp vs Jan-Oct 2019

YTD Room Sales

474,774

▲ +17% vs Jan-Oct 2019

YTD Bed Sales

830,007

▲ +12% vs Jan-Oct 2019

Room and Bed Occupancy

- Northern Ireland guesthouses, guest accommodation and B&Bs (GH/GA/BB) have had a positive January-October 2022 period, with figures indicating that this sector continues to be further along in its recovery than the hotel sector.
- January-October 2022 room occupancy is 2 percentage points above levels seen during the same period in 2019, whilst bed occupancy is up 1pp on the first ten months of 2019.
- GH/GA/BB room and bed occupancy in the month of October 2022 each saw growth of 7pps compared to the same month in 2019.
- Last month (September 2022), room occupancy had increased by 10pps and bed occupancy grew by 3pps.

Room and Bed Sales

- There have been over 474,000 rooms and more than 830,000 bed spaces sold in guesthouses, guest accommodation and B&Bs so far in 2022.
- NI GH/GA/BB room sales for January-October 2022 have increased by 17% compared to January-October 2019.
- Looking at individual monthly performance, room sales in October 2022 grew significantly (+28%) compared to October 2019. This follows on from 31% growth reported last month.
- October's 2022 bed sales experienced the largest single-month increase so far this year – up 42% on October 2019. As a result, YTD bed sales are now 12% above 2019 (last month, YTD bed sales were up 9% on 2019).

Room and bed-space occupancy varied across Local Government Districts (LGDs) during January-October 2022. Belfast City LGD recorded the highest room occupancy (63%) by a considerable margin, while Lisburn & Castlereagh recorded the largest increase in room occupancy compared with January-October 2019 (+15pps).



GH/GA/BB Performance

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GH/GA/BB room and bed-space occupancy by Local Government District January-October 2022

Local Government District	Room Occupancy	Change vs 2019	Bed Occupancy	Change vs 2019
Antrim and Newtownabbey	37%	+1pp	34%	+9pps
Ards and North Down	31%	+5pps	28%	+10pps
Armagh City, Banbridge and Craigavon	28%	No Change	24%	+2pps
Belfast City	63%	+8pps	42%	-4pps
Causeway Coast and Glens	32%	+3pps	29%	+4pps
Derry City and Strabane	34%	-3pps	32%	+1pp
Fermanagh and Omagh	31%	-6pps	25%	-3pps
Lisburn and Castlereagh	45%	+15pps	35%	+9pps
Mid and East Antrim	35%	+1pp	35%	+8pps
Mid Ulster	35%	-11pps	26%	-3pps
Newry, Mourne and Down	27%	-1pp	21%	-1pp

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

**pps = percentage points