



Hotel Performance

January-August 2023

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

All figures correct as of 11/10/2023.

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-August 2023

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January-August 2023 indicate hotel room occupancy experienced no change while bed occupancy declined marginally compared with the same pre-pandemic period. Year-to-date sales were below those achieved during January-August 2019. Room occupancy for August 2023 fell by 3 percentage points and room sales declined by 12% compared to August 2019.

YTD Room Occupancy

68%

No change vs Jan-Aug 2019

YTD Bed Occupancy

54%

▼ -2pps vs Jan-Aug 2019

YTD Room Sales

1,458,883

▼ -7% vs Jan-Aug 2019

YTD Bed Sales

2,609,501

▼ -3% vs Jan-Aug 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 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 August 2023 (78%) was down by 3 percentage points compared to August 2019. August room occupancy this year also decreased by 2 percentage points compared to last month (July 2023 – 76% room occupancy).
- NI's 2023 YTD hotel room occupancy is 3 percentage points higher than last year (January-August 2022).

Room and Bed Sales

- YTD room sales remain 7% below January-August 2019. This is one percentage point lower than the figure reported in last month's report.
- Room sales in the month of August 2023 declined by 12% compared to August 2019. We had previously seen a monthly decrease in room sales in June and July 2023 vs 2019.
- YTD bed sales for January-August 2023 decreased by 3% compared with 2019.
- Bed sales in August 2023 decreased by 9% on 2019. This followed from an 8% decline in bed sales reported in July 2023 on the 2019 figure.
- Compared to last year (2022), January-August 2023 room and bed sales are both 3% below 2022 levels.



Hotel Performance

January-August 2023

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Source: NISRA

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

Hotel room and bed occupancy by Local Government District January-August 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	75%	+3pps	60%	+2pps
Causeway Coast and Glens	66%	-6pps	49%	+3pps
Derry City and Strabane	69%	No change	58%	+8pps
Fermanagh and Omagh	63%	-8pps	46%	-11pps
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-August 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-August 2023

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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

YTD Room Occupancy

40%

▲ +4pps vs Jan-Aug 2019

YTD Bed Occupancy

34%

▲ +5pps vs Jan-Aug 2019

YTD Room Sales

368,088

▲ +14% vs Jan-Aug 2019

YTD Bed Sales

703,671

▲ +19% vs Jan-Aug 2019

Room and Bed Occupancy

- Northern Ireland (NI) guest houses, guest accommodation and B&Bs (GH/GA/BB) have had a positive January-August 2023 period, with room and bed occupancy experiencing growth of 4 and 5 percentage points respectively compared to 2019.
- Looking at individual monthly performance, room occupancy in the month of August 2023 experienced a decline of 4 percentage points compared to the same month in 2019, the first fall recorded after seven consecutive months of growth vs 2019.
- GH/GA/BB room occupancy has decreased by 1 percentage point, while bed occupancy has decreased by 5 percentage points, in comparison to last month (July 2023).

Room and Bed Sales

- There have been over 368,000 rooms and 704,000 bed spaces sold in guest houses, guest accommodation and B&Bs in January-August 2023.
- NI GH/GA/BB room sales for January-August 2023 have increased by 14% compared to January-August 2019.
- Looking at individual monthly performance, room sales in August 2023 fell by 4% compared to August 2019. This follows on from increases in each of the previous seven months.
- GH/GA/BB room sales for January-August 2023 are on par with room sales in the same period last year (January-August 2022).

Room and bed-space occupancy varied across Local Government Districts (LGDs) during January-August 2023. Belfast City LGD recorded the highest room occupancy (55%), while Lisburn & Castlereagh LGD recorded the largest increase in room occupancy compared with January-August 2019 (+15pps).



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-August 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	30%	+4pps	25%	+4pps
Belfast City	55%	+2pps	45%	-1pps
Causeway Coast and Glens	40%	+10pps	39%	+13pps
Derry City and Strabane	41%	+4pps	37%	+6pps
Fermanagh and Omagh	36%	-2pps	26%	-1pps
Lisburn and Castlereagh	44%	+15pps	35%	+9pps
Mid and East Antrim	28%	-6pps	29%	+3pps
Mid Ulster	*	*	*	*
Newry, Mourne and Down	41%	+11pps	29%	+7pps

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

†pps = percentage points