



Hotel Performance

January-September 2023

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

All figures correct as of 14/11/2023.

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-September 2023

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January-September 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-September 2019. Room occupancy for September 2023 fell by 1 percentage point and room sales declined by 14% compared to September 2019.

YTD Room Occupancy

68%

▼ -1pp vs Jan-Sep 2019

YTD Bed Occupancy

54%

▼ -2pps vs Jan-Sep 2019

YTD Room Sales

1,640,852

▼ -8% vs Jan-Sep 2019

YTD Bed Sales

2,958,088

▼ -3% vs Jan-Sep 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 room occupancy, and a 2 percentage point fall in bed occupancy compared to 2019.
- Looking at individual monthly performance, room occupancy in September 2023 (69%) was down by 5 percentage points compared to September 2019. September room occupancy this year decreased by 9 percentage points compared to last month (August 2023 – 78% room occupancy).
- NI's 2023 YTD hotel room occupancy is 2 percentage points higher than last year (January-September 2022).

Room and Bed Sales

- YTD room sales remain 8% below January-September 2019. This is one percentage point lower than the figure reported in last month's report.
- Room sales in the month of September 2023 decreased by 14% compared to September 2019, following monthly decreases in room sales in July and August 2023 vs 2019.
- YTD bed sales for January-September 2023 decreased by 3% compared with 2019.
- Bed sales in September 2023 increased by 1% on 2019. This followed from a 9% decline in bed sales reported in August 2023 on the 2019 figure.
- Compared to last year (2022), January-September 2023 room and bed sales are 17% and 1% below 2022 levels, respectively.

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



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Hotel room and bed occupancy by Local Government District (January-September 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	74%	+1pp	60%	+2pps
Causeway Coast and Glens	67%	-5pps	50%	+4pps
Derry City and Strabane	70%	+1pp	58%	+9pps
Fermanagh and Omagh	65%	-6pps	48%	-9pps
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-September 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-September
2023

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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-Sep 2019

YTD Bed Occupancy

34%

▲ +5pps vs Jan-Sep 2019

YTD Room Sales

421,609

▲ +15% vs Jan-Sep 2019

YTD Bed Sales

807,355

▲ +20% vs Jan-Sep 2019

Room and Bed Occupancy

- Northern Ireland (NI) guest houses, guest accommodation and B&Bs (GH/GA/BB) have had a positive January-September 2023 period, with room and bed occupancy experiencing an increase of 4 and 5 percentage points respectively compared to 2019.
- Looking at individual monthly performance, room occupancy in the month of September 2023 increased by 6 percentage points compared to the same month in 2019, following a slight decline in August 2023 v August 2019.
- GH/GA/BB room occupancy has decreased by 6 percentage points in comparison to last month (August 2023), while bed occupancy has risen by 3 percentage points.

Room and Bed Sales

- More than 421,000 rooms and 807,000 bed spaces were sold in guest houses, guest accommodation and B&Bs in January-September 2023.
- This represents growth of 15% and 20% respectively compared to January-September 2019.
- Looking at individual monthly performance, room sales in September 2023 increased by 18% compared to September 2019. This follows a fall of 4% in August 2023 compared with 2019.
- GH/GA/BB room sales for January-September 2023 are on par with room sales in the same period last year (January-September 2022).

Room and bed-space occupancy varied across Local Government Districts (LGDs) during January-September 2023. Belfast City LGD recorded the highest room occupancy (56%), while Lisburn & Castlereagh LGD recorded the largest increase in room occupancy compared with January-September 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-September 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%	+4pps	26%	+3pps
Belfast City	56%	+2pps	46%	-1pps
Causeway Coast and Glens	41%	+10pps	38%	+12pps
Derry City and Strabane	42%	+5pps	37%	+6pps
Fermanagh and Omagh	37%	No change	28%	+1pps
Lisburn and Castlereagh	45%	+16pps	35%	+10pps
Mid and East Antrim	27%	-9pps	28%	+1pps
Mid Ulster	*	*	*	*
Newry, Mourne and Down	41%	+12pps	29%	+7pps

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

†pps = percentage points