



Hotel Performance

January-April 2023

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

All figures correct as of 20/06/2023.

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-April 2023

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January-April 2023 indicate hotel room and bed occupancy each experienced a small increase compared with the same period pre-pandemic. Year-to-date room sales have decreased in January-April 2023 compared with 2019. Room occupancy for the month of April 2023 grew by 6 percentage points compared to April 2019, while room sales experienced growth of 4%.

YTD Room Occupancy

59%

▲ +1pp vs Jan-Apr 2019

YTD Bed Occupancy

47%

▼ -1pp vs Jan-Apr 2019

YTD Room Sales

626,367

▼ -4% vs Jan-Apr 2019

YTD Bed Sales

1,118,976

▲ +1% vs Jan-Apr 2019

Room and Bed Occupancy

- Northern Ireland (NI) year-to-date (YTD) hotel room and bed occupancy figures sit at 59% and 47% respectively. These represent a 1 percentage point increase in room occupancy and a 1 percentage point decline in bed occupancy compared to 2019.
- Looking at individual monthly performance, room occupancy in April 2023 (68%) was up by 6 percentage points compared to April 2019. This followed on from a 6 percentage point increase in March and declines in January and February.
- NI's 2023 YTD hotel room occupancy is 1 percentage point higher than last year (January-April 2022).

Room and Bed Sales

- Room sales in the month of April 2023 experienced growth of 4% compared to April 2019. This followed on the 5% increase in March 2023 vs 2019.
- As a result, YTD room sales have moved closer to 2019 levels than we saw in last month's report but still fall 4% below January-April 2019.
- Bed sales in April 2022 were up by 17% on 2019, after two consecutive months of declines in February and March 2023.
- As a result, YTD bed sales are now marginally above bed sales in 2019.
- Compared to last year (2022), January-April 2023 room sales have increased by 2%.



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Source: NISRA

Hotel Performance - NI

January-April 2023

Performance during January-April 2023 varied across NI Local Government Districts (LGD). Belfast City recorded the highest room occupancy of all the NI LGDs (67%) and was the only LGD to experience a growth in YTD room occupancy compared to 2019. Fermanagh and Omagh LGD's 2023 room occupancy is on par with 2019, with all other LGDs experiencing declines.

Hotel room and bed occupancy by Local Government District January-April 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	67%	+5pps	53%	+4pps
Causeway Coast and Glens	55%	-5pps	41%	+2pps
Derry City and Strabane	56%	-2pps	50%	+7pps
Fermanagh and Omagh	63%	No Change	38%	-15pps
Lisburn and Castlereagh	*	*	*	*
Mid and East Antrim	28%	-34pps	28%	-22pps
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-April 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-April 2023

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Source: NISRA

YTD Room Occupancy

31%

▲ +6pps vs Jan-Apr 2019

YTD Bed Occupancy

28%

▲ +10pps vs Jan-Apr 2019

YTD Room Sales

138,615

▲ +29% vs Jan-Apr 2019

YTD Bed Sales

274,812

▲ +51% vs Jan-Apr 2019

Room and Bed Occupancy

- Northern Ireland guesthouses, guest accommodation and B&Bs (GH/GA/BB) have had a positive January-April 2023 period, with room occupancy experiencing growth of 6 percentage points compared to 2019. Bed occupancy has seen larger growth of 10 percentage points.
- Looking at individual monthly performance, room occupancy in the month of April 2022 saw growth of 4 percentage points compared to the same month in 2019, marking the fourth consecutive month of growth vs 2019.
- GH/GA/BB January-April 2023 room occupancy is also up 5 percentage points vs the same period last year (January-April 2022), and bed occupancy has grown by 11 percentage points.

Room and Bed Sales

- There have been over 138,000 rooms and more than 274,000 bed spaces sold in guesthouses, guest accommodation and B&Bs in January-April 2023
- NI GH/GA/BB room sales for January-April 2023 have increased by 29% compared to January-April 2019.
- Looking at individual monthly performance, room sales in April 2023 grew significantly (+18%) compared to April 2019. This follows on from increases of 26% in March, 13% in February 2019, and 73% in January 2019.
- Compared to last year (January-April 2022), GH/GA/BB room sales have increased by 9% in 2023.

Room and bed-space occupancy varied across Local Government Districts (LGDs) during January-April 2023. Belfast City LGD recorded the highest room occupancy (48%), while Lisburn & Castlereagh LGD recorded the largest increase in room occupancy compared with January-April 2019 (+18pps).



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-April 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	25%	+3pps	21%	+6pps
Belfast City	48%	+2pps	42%	+4pps
Causeway Coast and Glens	23%	+7pps	25%	+11pps
Derry City and Strabane	40%	+13pps	33%	+12pps
Fermanagh and Omagh	27%	No Change	25%	+7pps
Lisburn and Castlereagh	38%	+18pps	28%	+13pps
Mid and East Antrim	25%	+5pps	23%	+9pps
Mid Ulster	*	*	*	*
Newry, Mourne and Down	33%	+13pps	23%	+9pps

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

**pps = percentage points