



Hotel Performance

January-May 2023

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

All figures correct as of 18/07/2023.

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-May 2023

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January-May 2023 indicate hotel room occupancy experienced a minor increase while bed occupancy declined marginally compared with the same period pre-pandemic. Year-to-date room sales have decreased in January-May 2023 compared with 2019. Room occupancy for the month of May 2023 grew by 3 percentage points and room sales also declined by 3% compared to May 2019.

YTD Room Occupancy

62%

▲ +1pp vs Jan-May 2019

YTD Bed Occupancy

48%

▼ -1pp vs Jan-May 2019

YTD Room Sales

828,616

▼ -4% vs Jan-May 2019

YTD Bed Sales

1,459,853

No change vs Jan-May 2019

Room and Bed Occupancy

- Northern Ireland (NI) year-to-date (YTD) hotel room and bed occupancy figures sit at 62% and 48% 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 May 2023 (75%) was up by 3 percentage points compared to May 2019. Room occupancy in May 2023 also increased by 7 percentage points compared to last month (April 2023 – 68% room occupancy).
- NI's 2023 YTD hotel room occupancy is 4 percentage points higher than last year (January-May 2022).

Room and Bed Sales

- Room sales in the month of May 2023 declined by 3% compared to May 2019. We had previously seen monthly increases in room sales in March and April 2023 vs 2019.
- Despite this, YTD room sales remain 4% below January-May 2019. The same figure as reported in last month's report.
- Bed sales in May 2022 also declined by 4%. This followed on from the 17% increase in bed sales reported in April 2023.
- YTD bed sales for January-May 2023 are on par with 2019.
- Compared to last year (2022), January-May 2023 room and bed sales are both 1% below 2022 levels.



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Source: NISRA

Hotel Performance - NI

January-May 2023

Performance during January-May 2023 varied across NI Local Government Districts (LGD). Belfast City recorded the highest room occupancy of all the NI LGDs (71%) and was the only reporting LGD to experience a growth in YTD room occupancy compared to 2019.

Hotel room and bed occupancy by Local Government District January-May 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	71%	+6pps	55%	+4pps
Causeway Coast and Glens	57%	-7pps	43%	+2pps
Derry City and Strabane	60%	-3pps	52%	+6pps
Fermanagh and Omagh	61%	-5pps	39%	-14pps
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-May 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-May 2023

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Source: NISRA

YTD Room Occupancy

33%

▲ +5pps vs Jan-May 2019

YTD Bed Occupancy

30%

▲ +9pps vs Jan-May 2019

YTD Room Sales

185,778

▲ +23% vs Jan-May 2019

YTD Bed Sales

373,431

▲ +45% vs Jan-May 2019

Room and Bed Occupancy

- Northern Ireland guest houses, guest accommodation and B&Bs (GH/GA/BB) have had a positive January-May 2023 period, with room occupancy experiencing growth of 5 percentage points compared to 2019. Bed occupancy has seen larger growth of 9 percentage points.
- Looking at individual monthly performance, room occupancy in the month of May 2022 experienced growth of 2 percentage points compared to the same month in 2019, marking the fifth consecutive month of growth vs 2019.
- GH/GA/BB room and bed occupancy have increased by 1 percentage point and 4 percentage points respectively in comparison to last month (April 2023)

Room and Bed Sales

- There have been over 185,000 rooms and more than 373,000 bed spaces sold in guest houses, guest accommodation and B&Bs in January-May 2023
- NI GH/GA/BB room sales for January-May 2023 have increased by 23% compared to January-May 2019.
- Looking at individual monthly performance, room sales in May 2023 grew by 10% compared to May 2019. This follows on from increases of 18% in April, 26% in March, 13% in February 2019, and 73% in January 2019.
- Compared to last year (January-May 2022), GH/GA/BB room sales have increased by 5% in 2023.

Room and bed-space occupancy varied across Local Government Districts (LGDs) during January-May 2023. Belfast City LGD recorded the highest room occupancy (51%), while Lisburn & Castlereagh LGD recorded the largest increase in room occupancy compared with January-May 2019 (+14pps).



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-May 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%	+2pps	24%	+7pps
Belfast City	51%	+8pps	43%	+6pps
Causeway Coast and Glens	28%	+9pps	28%	+13pps
Derry City and Strabane	38%	+8pps	34%	+10pps
Fermanagh and Omagh	30%	-2pps	28%	+7pps
Lisburn and Castlereagh	37%	+14pps	31%	+11pps
Mid and East Antrim	26%	+3pps	24%	+9pps
Mid Ulster	*	*	*	*
Newry, Mourne and Down	32%	+8pps	23%	+7pps

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

†pps = percentage points