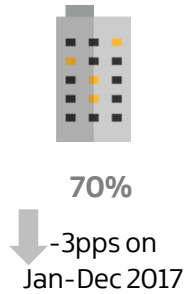
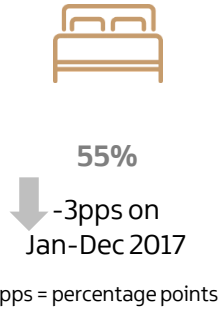


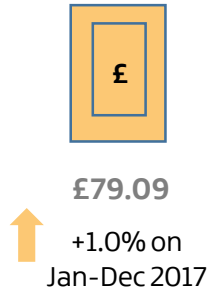
ROOM OCCUPANCY



BED-SPACE OCCUPANCY



AVERAGE DAILY RATE



2018 WAS A RECORD YEAR FOR HOTEL DEMAND IN TERMS OF ROOM AND BED SALES WITH OVER 3.7 MILLION HOTEL GUESTS ACCOMMODATED. HOWEVER BOTH ROOM AND BED-SPACE OCCUPANCY RECORDED DECREASES, AS AN IMPACT OF THE INFLUX OF HOTEL ROOMS AND BEDS DURING THIS PERIOD, PARTICULARLY IN BELFAST.

ROOM OCCUPANCY AND ROOM STOCK BY LOCAL GOVERNMENT DISTRICT

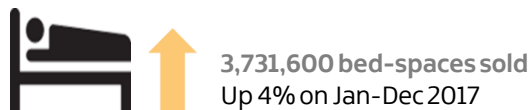
Hotels experienced record occupancy levels across all council areas in 2017, following on from this some areas have recorded declines during Jan-Dec 2018. With the exception of Belfast, figures are still above those recorded during the same period in 2016. The Belfast area recorded a drop of 6 percentage points in room occupancy (74%), due to the addition of more hotel rooms during this period, however sales have increased when compared with the same period last year.

Hotel room occupancy and room stock by Local Government District

Local Government District	Room occup Jan-Dec 2018	Occupancy Change from Jan-Dec 2017	Room stock end Dec 2018	% of total NI room stock Dec 2018	Stock change Dec 18 v Dec 17
Antrim and Newtownabbey	66%	-3pps	631	7%	0%
Ards and North Down	*	*	292	3%	-2%
Armagh City, Banbridge and Craigavon	65%	+7pps	209	2%	0%
Belfast City	74%	-6pps	4,706	51%	+30%
Causeway Coast and Glens	67%	no change	692	8%	0%
Derry City and Strabane	68%	-2pps	711	8%	0%
Fermanagh and Omagh	64%	-4pps	435	5%	0%
Lisburn and Castlereagh	*	*	255	3%	0%
Mid and East Antrim	74%	+1pp	539	6%	10%
Mid Ulster	55%	-1pp	237	3%	0%
Newry, Mourne and Down	60%	-3pps	514	6%	-3%
Total	70%	-3pps	9,221	100%	+14%

SALES JAN-DEC 2018

Overall there were an additional 107,700 rooms and 130,600 bed-spaces sold in hotels during Jan-Dec 2018



some figures have been revised due to release of NISRA annual occupancy figures on 6/6/19

Sources: NISRA Accommodation Surveys, STR Global

*sample size too small to provide a reliable estimate

(percentage point change Jan-Dec 2018/17)

ROOM OCCUPANCY



37%
↑ +1pp on
Jan-Dec 2017

BED-SPACE OCCUPANCY



28%
↑ +1pp on
Jan-Dec 2017

GUEST HOUSE/GUEST ACCOMMODATION/B&Bs DELIVERED A STRONG PERFORMANCE DURING JAN-DEC 2018 WITH AN ADDITIONAL 51,000 BED-SPACES SOLD COMPARED WITH THE SAME PERIOD IN 2017.

SALES JAN-DEC 2018

NI guest house/guest accommodation and B&B establishments achieved record breaking sales during December 2018 with over 44,000 bed-spaces sold, an increase of 20% compared to December 2017



↑ 453,700 rooms sold
Up 7% on Jan-Dec 2017



↑ 777,100 bed-spaces sold
Up 7% on Jan-Dec 2017

ROOM OCCUPANCY AND ROOM STOCK BY LOCAL AUTHORITY DISTRICT

Guest House, Guest Accommodation and B&B room occupancy and room stock by Local Government District					
Local Government District	Room occup Jan-Dec 2018	Occupancy Change from Jan-Dec 2017	Room stock end Dec 2018	% of total NI room stock Dec 2018	Stock change Dec 18 v Dec 17
Antrim and Newtownabbey	54%	+17pps	97	3%	-7%
Ards and North Down	25%	-9pps	226	6%	+6%
Armagh City, Banbridge and Craigavon	28%	-22pps	189	5%	+9%
Belfast City	58%	-5pps	550	15%	+54%
Causeway Coast and Glens	34%	-2pps	914	25%	+12%
Derry City and Strabane	40%	+13pps	255	7%	+3%
Fermanagh and Omagh	40%	+3pps	421	12%	+1%
Lisburn and Castlereagh	29%	-6pps	149	4%	+26%
Mid and East Antrim	41%	-6pps	186	5%	+24%
Mid Ulster	55%	+19pps	155	4%	+10%
Newry, Mourne and Down	29%	+2pps	477	13%	+2%
Total	37%	+1pp	3,619	100%	+13%

pps = percentage points

(percentage point change Jan-Dec 2018/17)

OVERALL 4.5 MILLION BED-SPACES WERE SOLD IN HOTELS, GUEST HOUSES, GUEST ACCOMMODATION AND B&Bs DURING JAN-DEC 2018, AN INCREASE OF 4% ON JAN-DEC 2017.