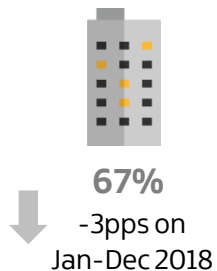
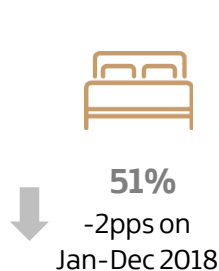


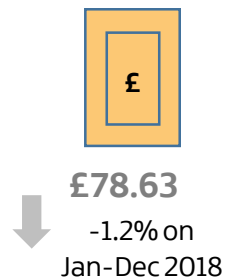
ROOM OCCUPANCY



BED-SPACE OCCUPANCY



AVERAGE DAILY RATE*



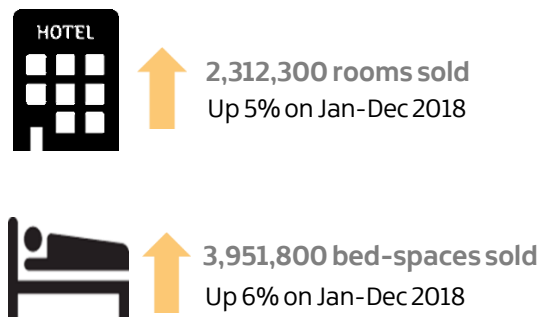
ROOM OCCUPANCY AND ROOM STOCK BY LOCAL GOVERNMENT DISTRICT

Performance varied across Northern Ireland Local Government Districts over 2019. The highest room occupancy was recorded in the Belfast area, achieving a room occupancy of 71%. The Mid Ulster area recorded the lowest room occupancy at 47%. At the end of December 2019 there were 9,596 hotel rooms available in hotels across Northern Ireland with half of those available in the Belfast area.

DURING JAN-DEC 2019 HOTELS ACHIEVED UNPRECEDENTED SALES WITH OVER 3.9 MILLION BED-SPACES SOLD. HOWEVER, BOTH ROOM AND BED-SPACE OCCUPANCY RECORDED DECREASES, LIKELY IMPACTED BY THE NUMBER OF ADDITIONAL ROOMS TO FILL DURING THIS PERIOD.

SALES JAN-DEC 2019

During 2019, on average, over 300,000 bed-spaces were sold every month.



Local Government District	Room occup Jan-Dec 2019	Occupancy Change from Jan-Dec 2018†	Room stock end Dec 2019	% of total NI room stock Dec 2019	Stock change Dec 19 v Dec 18
Antrim and Newtownabbey	57%	-9pps	631	7%	0%
Ards and North Down	+	+	378	4%	+29%
Armagh City, Banbridge and Craigavon	64%	-2pps	207	2%	-1%
Belfast City	71%	-3pps	4,791	50%	+2%
Causeway Coast and Glens	67%	no change	737	8%	+6%
Derry City and Strabane	66%	-2pps	838	9%	+18%
Fermanagh and Omagh	68%	+4pps	421	4%	-3%
Lisburn and Castlereagh	+	+	255	3%	0%
Mid and East Antrim	70%	-4pps	539	6%	0%
Mid Ulster	47%	-7pps	237	2%	0%
Newry, Mourne and Down	57%	-3pps	562	6%	+9%
Total	67%	-3pps	9,596		+4%

*Average Daily Rate (ADR) – A measure of the average rate paid for rooms sold, calculated by dividing room revenue by rooms sold.

Sources: NISRA Accommodation Surveys & STR Global

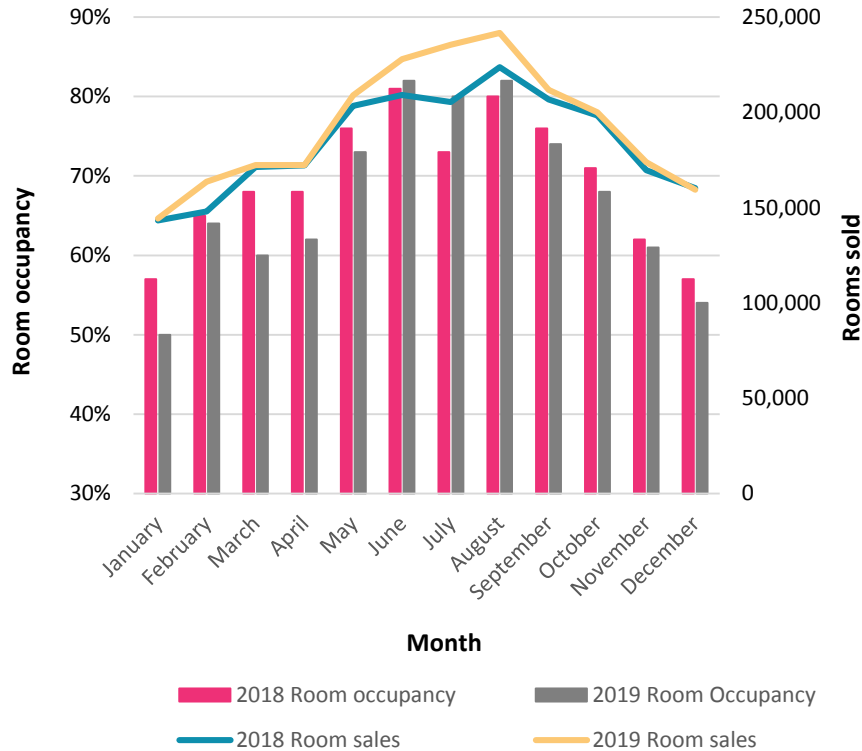
†(percentage point change Jan-Dec 2019/18)

pps = percentage points

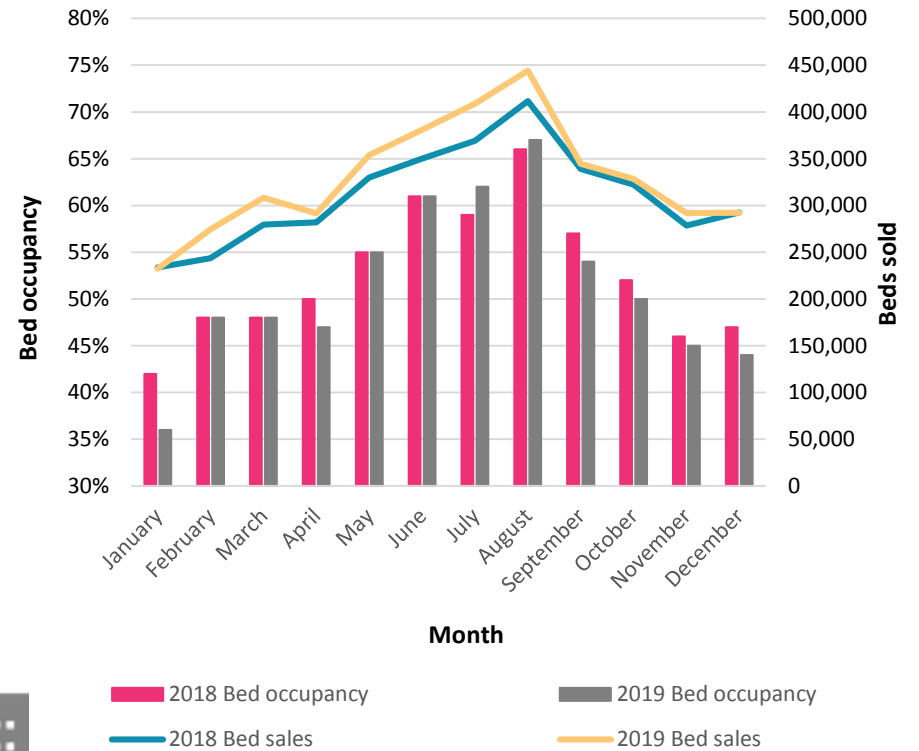
* sample size too small to provide a reliable estimate

HOTEL OCCUPANCY 2019 – ANALYSIS BY MONTH

Hotel room occupancy & sales by month



Hotel bed occupancy & sales by month



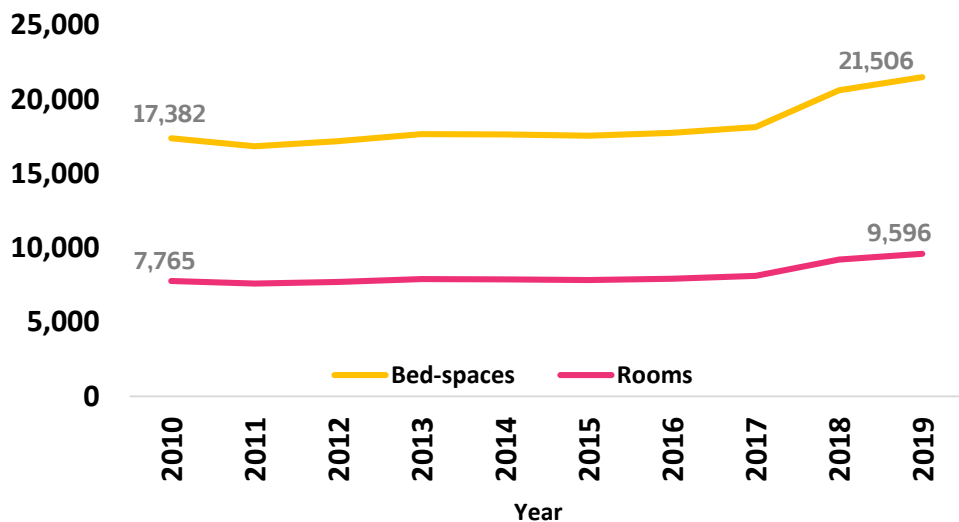
- Room occupancy and bed-space occupancy rates vary from month to month
- Hotel monthly room occupancy during 2019 was the highest in the months of June and August (82%) with the highest bed-space occupancy recorded in the month of August
- January experienced the lowest monthly room occupancy rate of 50% and the lowest bed-space occupancy rate of 36%

- The month of August recorded the highest rooms sold (241,700) and the highest number of bed-spaces sold (444,300) both increasing by 8% on August 2018
- The month of July saw the highest increase in room and bed-spaces sold, an increase of 15% and 11% respectively, likely impacted by the increase in demand due to NI's hosting of The 148th Open



HOTEL ROOM AND BED-SPACE 2010 - 2019

Hotel room and bed-space stock 2010 - 2019



At the end of December 2019 there were 145 hotels with 9,596 rooms and 21,506 bed-spaces, an increase of 4% on both rooms and bed-spaces available compared to the end of December 2018.

Hotel room and bed-space capacity remained relatively stable during the period 2010 to 2017 with a period of growth during 2018 and 2019. There was an increase of 1,475 rooms and 3,371 bed-spaces added during this period.

Additional Hotels Opened During 2019

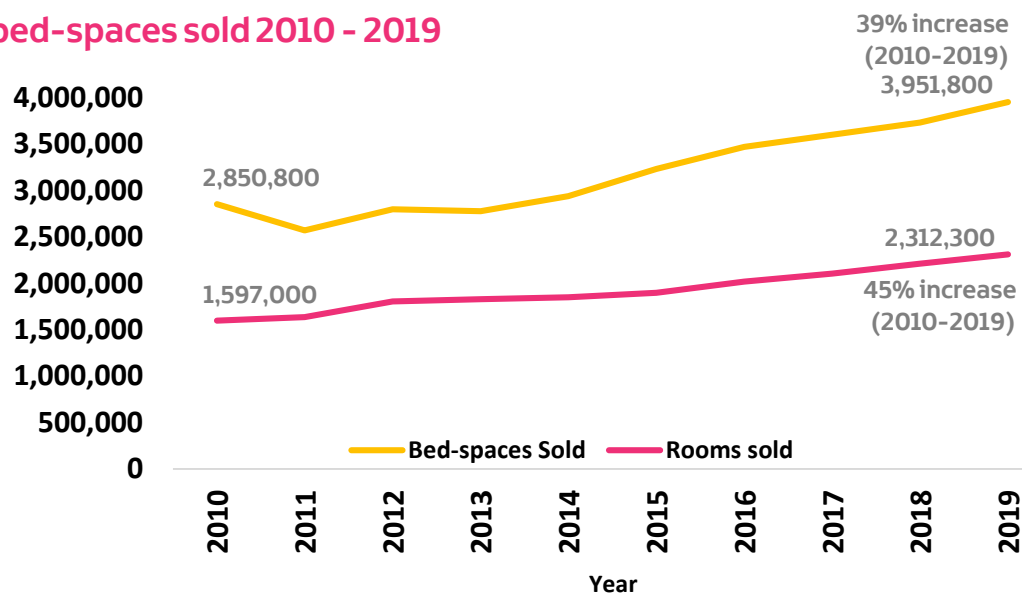
Hotel name	Month opened	Location	Rooms available	Bed-spaces available
Killeavy Castle Estate	April	Armagh	46	98
Holiday Inn Express	June	Derry~Londonderry	119	238
Premier Inn	June	Bangor	85	170
The Salthouse	June	Ballycastle	24	48
The Landsdowne [‡]	July	Belfast	23	48

[‡]Re-opened following closure during June 2018 to June 2019

Hotel rooms and bed-spaces sold 2010 - 2019

There were 2,312,300 rooms and 3,951,800 bed-spaces sold during 2019 an increase 5% and 6% compared to the same period in 2018. This equated to an additional 100,400 rooms and 220,200 bed-spaces sold compared to Jan-Dec 2018.

When we compare bed sales to the same period in 2010, there were over 1.1 million additional bed-spaces sold in hotels during Jan-Dec 2019 compared to Jan-Dec 2010.



ROOM OCCUPANCY



33%

↓ -4pps on Jan-Dec 2018

BED-SPACE OCCUPANCY



25%

↓ -3pps on Jan-Dec 2018

GUEST HOUSE/GUEST ACCOMMODATION/B&Bs (GH/GA/B&Bs) DELIVERED A STRONG PERFORMANCE DURING JAN-DEC 2019 WITH AN ADDITIONAL 49,000 BED-SPACES SOLD COMPARED TO THE SAME PERIOD IN 2018. HOWEVER AVERAGE ROOM AND BED-SPACE OCCUPANCY RECORDED DECREASES, PROBABLY AFFECTED BY THE INCREASE IN ADDITIONAL ROOMS TO FILL COMPARED WITH JAN-DEC 2018.

SALES JAN-DEC 2019

The number of rooms sold in GH/GA/B&Bs during Jan-Dec 2019 increased by 1% while bed-spaces sold experienced an increase of 6%, possibly indicating increases in multiple occupancy rooms.



2019 was a record year for GH/GA/B&Bs in terms of room and bed-space sales.

↑ 458,200 rooms sold
Up 1% on Jan-Dec 2018



↑ 826,400 bed-spaces sold
Up 6% on Jan-Dec 2018

ROOM OCCUPANCY AND ROOM STOCK BY LOCAL GOVERNMENT DISTRICT

Room occupancy declined across many Council areas, likely impacted by the increase in additional rooms to fill compared with Jan-Dec 2018. The highest room occupancy was recorded in the Belfast area, achieving an occupancy level of 52%.

At the end of December 2019 there were 3,999 rooms available in GH/GA/B&Bs across Northern Ireland with a quarter of those available in the Causeway Coast and Glens area. Antrim and Newtownabbey area has the lowest number of GH/GA/B&B rooms.

Guest House, Guest Accommodation and B&B room occupancy and room stock by Local Government District

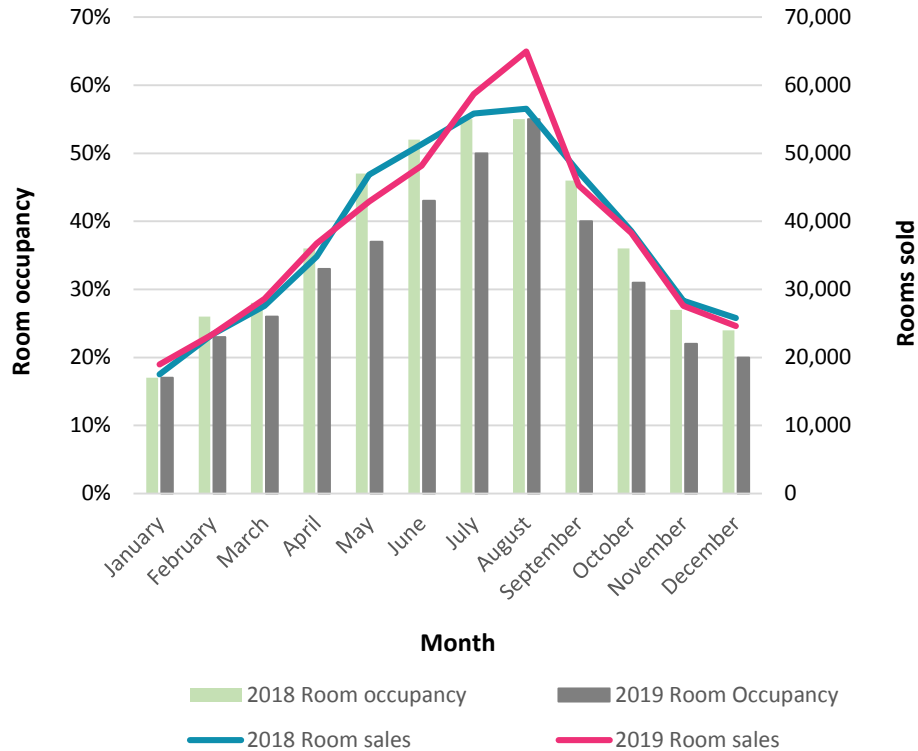
Local Government District	Room occup Jan-Dec 2019	Occupancy Change from Jan-Dec 2018*	Room stock end Dec 2019	% of total NI room stock Dec 2019	Stock change Dec 19 v Dec 18
Antrim and Newtownabbey	36%	-18pps	140	4%	+44%
Ards and North Down	25%	no change	231	6%	+2%
Armagh City, Banbridge and Craigavon	26%	-2pps	186	5%	-2%
Belfast City	52%	-6pps	631	16%	+15%
Causeway Coast and Glens	26%	-8pps	1,009	25%	+10%
Derry City and Strabane	35%	-5pps	318	8%	+25%
Fermanagh and Omagh	35%	-5pps	445	11%	+6%
Lisburn and Castlereagh	31%	+2pps	159	4%	+7%
Mid and East Antrim	32%	-9pps	201	5%	+8%
Mid Ulster	44%	-11pps	193	5%	+25%
Newry, Mourne and Down	25%	-3pps	486	12%	+2%
Total	33%	-4pps	3,999		+11%

* (percentage point change Jan-Dec 2019/18)

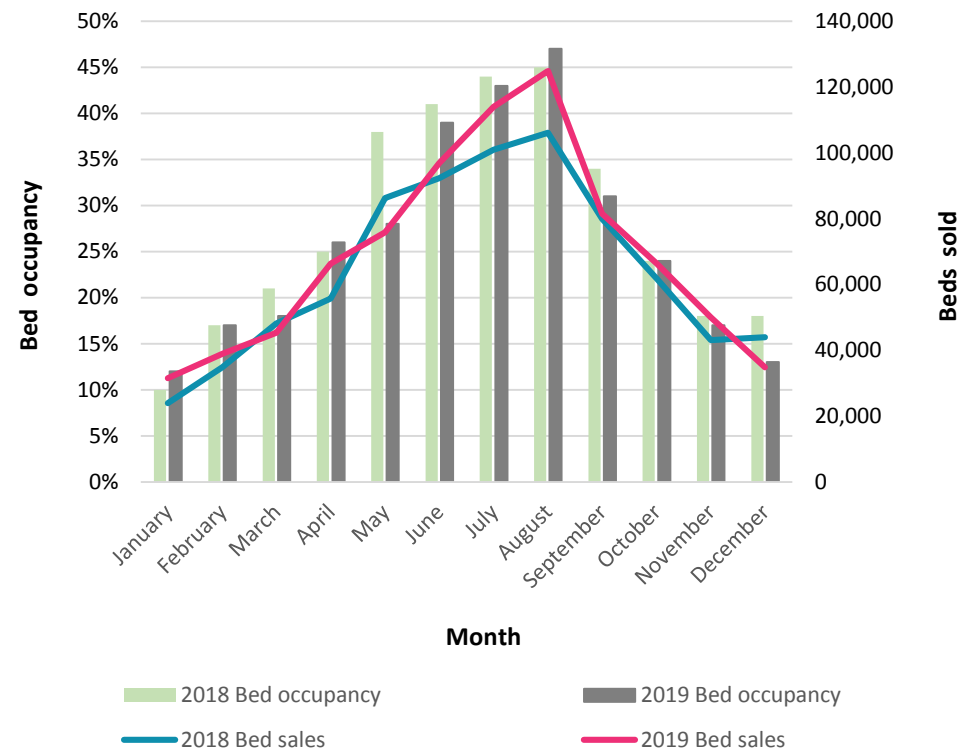
pps = percentage points

GH/GA/B&B OCCUPANCY 2019 – ANALYSIS BY MONTH

GH/GA/B&B room occupancy & sales by month



GH/GA/B&B bed occupancy & sales by month

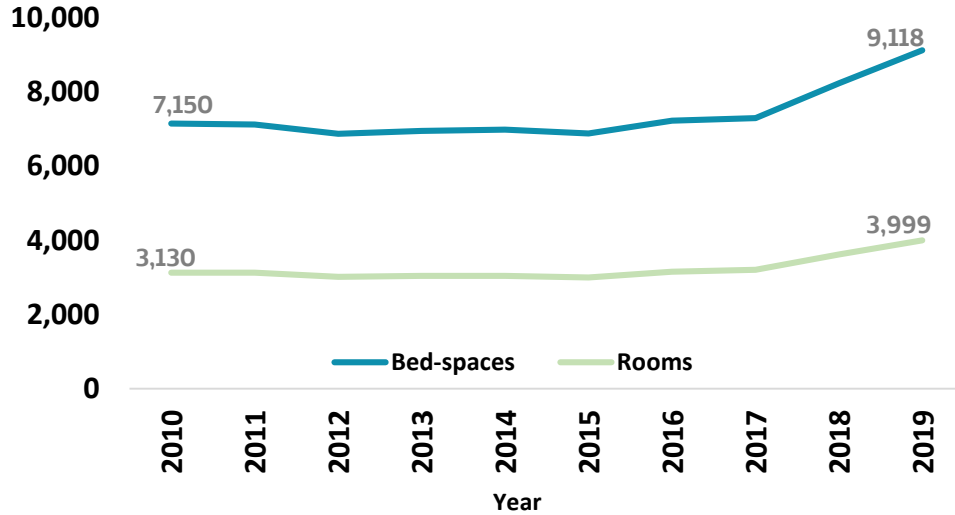


- GH/GA/B&B monthly room occupancy during 2019 was the highest in August (55%) with the highest bed-space occupancy also recorded that month (47%)
- January saw the lowest monthly room occupancy rate of 17% and the lowest bed-space occupancy rate of 12%

- The month of August recorded the highest number of rooms sold (65,000) and the highest number of bed-spaces sold (124,900), increases of 15% and 18% respectively compared to August 2018
- The month of January experienced the highest increase in bed-spaces sold up 31% compared with January 2018 with the largest decrease evident during the month of December, bed-spaces sold during December declined by 21% compared with December 2018

GH/GA/B&B BED-SPACE 2010 - 2019

GH/GA/B&B room and bed-space stock 2010 - 2019

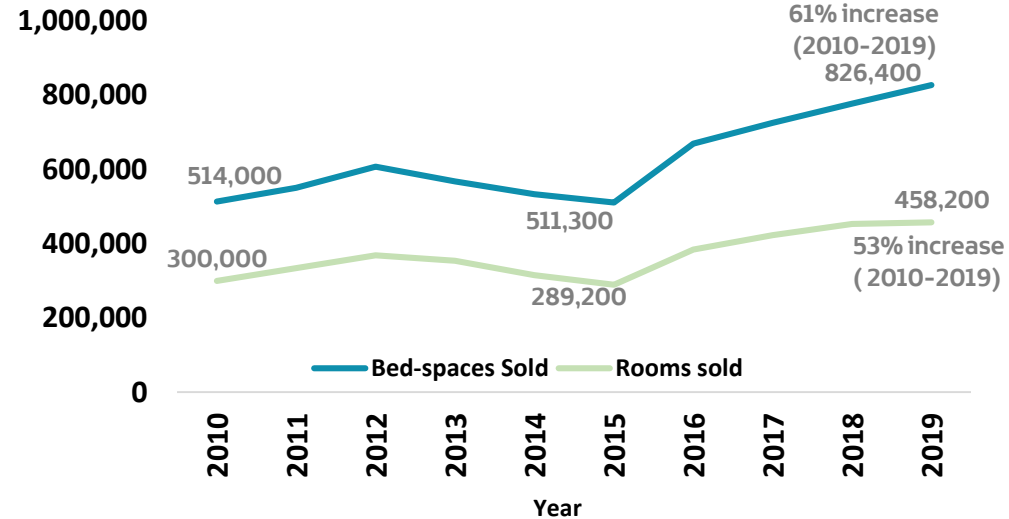


At the end of December 2019 there were 962 GH/GA/B&Bs with 3,999 rooms and 9,118 bed-spaces, an increase of 11% on both rooms and bed-spaces available compared to end December 2018.

Room and bed-space capacity remained relatively stable during the period 2010 to 2017 with a period of growth between 2017 and 2019.

GH/GA/B&B rooms and bed-spaces sold 2010 - 2019

Following a decline in room and bed-space sales between 2012 and 2015, sales picked up, demonstrating growth between 2016 and 2019.



ALMOST 4.8 MILLION BED-SPACES WERE SOLD IN HOTELS, GUEST HOUSES, GUEST ACCOMMODATION AND B&Bs DURING JAN-DEC 2019, AN INCREASE OF 6% ON JAN-DEC 2018.