



Hotel Performance

January-December 2022

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

All figures correct as of 23/02/2023.

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-December 2022

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January-December 2022 indicate hotel room and bed occupancy each experienced a small decline compared with the same period pre-pandemic. Year-to-date room sales also decreased slightly in 2022 compared with 2019. Room occupancy for the month of December 2022 increased by 3 percentage points compared to December 2019, while room sales experienced growth of 5%.

YTD Room Occupancy

66%

▼ -1pps vs Jan-Dec 2019

YTD Bed Occupancy

51%

▼ -3pps vs Jan-Dec 2019

YTD Room Sales

2,289,343

▼ -1% vs Jan-Dec 2019

YTD Bed Sales

4,011,779

▲ +2% vs Jan-Dec 2019

Room and Bed Occupancy

- Northern Ireland (NI) year-to-date (YTD) hotel room and bed occupancy figures sit at 66% and 51% respectively. These represent a 1 percentage point decline in room occupancy and a 3 percentage point decline in bed occupancy compared to 2019.
- Given the challenging start to 2022 when the Omicron variant had a significant impact on performance, these YTD figures have exceeded expectations and are encouraging as we progress into 2023.
- Looking at individual monthly performance, room occupancy in December 2022 (57%) was up by 3 percentage points compared to December 2019. This followed on from a very positive November to give a strong performing end to 2022.

Room and Bed Sales

- Room sales in the month of December 2022 experienced growth of 5% compared to December 2019. This followed on from growth of 11% in November 2022.
- Despite this, YTD room sales remain 1% below 2019, the same figure reported in last month's report.
- Bed sales in November 2022 were also 5% higher than 2019, matching the 6% increase seen in October.
- As a result, YTD bed sales are now 2% above the December bed sales in 2019. Last month's report showed YTD bed sales only marginally exceeding 2019 figures.
- 4.0m bed sales in 2022 is a new record high for NI hotels.



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Source: NISRA

Hotel Performance - NI

January-December 2022

Performance during January-December 2022 varied across NI Local Government Districts (LGD). Belfast City recorded the highest room occupancy of all the NI LGDs (72%), and was also the only LGD to match pre-pandemic room occupancy levels.

Hotel room and bed occupancy by Local Government District January-December 2022

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	72%	No Change	53%	-4pps
Causeway Coast and Glens	64%	-3pps	46%	+2pps
Derry City and Strabane	63%	-3pps	52%	+4pps
Fermanagh and Omagh	59%	-9pps	55%	No Change
Lisburn and Castlereagh	*	*	*	*
Mid and East Antrim	69%	-2pps	56%	-3pps
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-December 2022 indicate that guesthouses, guest accommodation and B&Bs (GH/GA/BB) experienced increases in both room occupancy and sales compared to 2019 figures. Performance suggests this sector is continuing to progress better in its recovery than hotels.



GH/GA/BB Performance

January-December
2022

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Source: NISRA

YTD Room Occupancy

37%

▲ +3pps vs Jan-Dec 2019

YTD Bed Occupancy

28%

▲ +3pps vs Jan-Dec 2019

YTD Room Sales

554,687

▲ +21% vs Jan-Dec 2019

YTD Bed Sales

952,391

▲ +15% vs Jan-Dec 2019

Room and Bed Occupancy

- Northern Ireland guesthouses, guest accommodation and B&Bs (GH/GA/BB) have had a positive January-December 2022 period, with figures indicating that this sector continues to be further along in its recovery than the hotel sector.
- GH/GA/BB room occupancy in the month of December 2022 saw growth of 9pps compared to the same month in 2019, while bed occupancy increased by 4pps.
- Breaking this sector down further, guesthouses YTD room and bed occupancy saw increases of 2pps and 6pps respectively. B&Bs saw a 4pps decline in room occupancy and no change in bed occupancy. Guest accommodation saw a 6pps growth in room occupancy and a 3pps growth in bed occupancy.

Room and Bed Sales

- There have been over 554,000 rooms and more than 952,000 bed spaces sold in guesthouses, guest accommodation and B&Bs in 2022 – a record year for both KPIs.
- NI GH/GA/BB room sales for January-December 2022 have increased by 21% compared to January-December 2019.
- Looking at individual monthly performance, room sales in December 2022 grew significantly (+62%) compared to December 2019. This follows on from increases of 45% in November, 28% in October and 31% in September.
- December 2022 bed sales also saw large growth of 44%. This follows on from 44%, 42% and 12% increases respectively in November, October and September 2022.

Room and bed-space occupancy varied across Local Government Districts (LGDs) during January-December 2022. Belfast City LGD recorded the highest room occupancy (64%) by a considerable margin, while Belfast City and Lisburn & Castlereagh each recorded the largest increase in room occupancy compared with January-December 2019 (+12pps).



GH/GA/BB Performance

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Source: NISRA

GH/GA/BB room and bed-space occupancy by Local Government District January-December 2022

Local Government District	Room Occupancy	Change vs 2019	Bed Occupancy	Change vs 2019
Antrim and Newtownabbey	32%	-4pps	31%	+7pps
Ards and North Down	28%	+4pps	27%	+9pps
Armagh City, Banbridge and Craigavon	26%	No Change	23%	+4pps
Belfast City	64%	+12pps	45%	+5pps
Causeway Coast and Glens	29%	+3pps	26%	+6pps
Derry City and Strabane	36%	+1pp	32%	+7pps
Fermanagh and Omagh	30%	-4pps	24%	-1pps
Lisburn and Castlereagh	43%	+12pps	35%	+9pps
Mid and East Antrim	33%	No Change	33%	+9pps
Mid Ulster	34%	-9pps	25%	-2pps
Newry, Mourne and Down	25%	No Change	20%	No Change

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

**pps = percentage points