



# Hotel Performance

## January–November 2022

*Data are compared against pre-pandemic figures in January–November 2019.*

*All figures correct as of 02/02/2023.*

*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–November 2022

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January–November 2022 indicate hotel room and bed occupancy each experienced a 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 November 2022 increased by 7 percentage points compared to November 2019, while room sales experienced growth of 11%.

### YTD Room Occupancy

**67%**

▼ -2pps vs Jan–Nov 2019

### YTD Bed Occupancy

**51%**

▼ -4pps vs Jan–Nov 2019

### YTD Room Sales

**2,121,534**

▼ -1% vs Jan–Nov 2019

### YTD Bed Sales

**3,704,159**

▲ +1% vs Jan–Nov 2019

### Room and Bed Occupancy

- Northern Ireland (NI) hotel room and bed occupancy figures remain unchanged from the figures reported last month, with the declines compared to 2019 also remaining unchanged from the January–October 2022 report.
- Looking at individual monthly performance, room occupancy in November 2022 (68%) was up by 7 percentage points compared to November 2019. This is the largest single month percentage point increase in room occupancy vs 2019 so far in 2022.
- Bed occupancy in the month of November 2022 also experienced growth of 3 percentage points compared to November 2019.

### Room and Bed Sales

- Room sales in the month of November 2022 experienced growth of 11% compared to November 2019. This matched April 2022 (also +11%) as the largest increase in monthly room sales this year.
- As a result, 2022 YTD room sales have moved closer to pre-pandemic room sales than we saw in last month's report. YTD room sales are now just 1% down on 2019 levels.
- Bed sales in November 2022 were 6% higher than 2019, matching the 6% increase seen in October.
- Resultingly, YTD bed sales are now marginally above the January–November bed sales in 2019.



# Hotel Performance

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**Source: NISRA**

## Hotel Performance - NI

## January-November 2022

Performance during January-November 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-November 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	66%	-3pps	47%	+2pps
Derry City and Strabane	65%	-3pps	53%	+3pps
Fermanagh and Omagh	61%	-9pps	56%	No Change
Lisburn and Castlereagh	*	*	*	*
Mid and East Antrim	69%	-2pps	55%	-4pps
Mid Ulster	*	*	*	*
Newry, Mourne and Down	57%	-2pps	49%	+6pps

\* = sample size too small to provide a reliable estimate.

\*\*pps = percentage points

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January-November 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-November  
2022

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**Source: NISRA**

YTD Room Occupancy

**37%**

▲ +3pps vs Jan-Nov 2019

YTD Bed Occupancy

**29%**

▲ +1pp vs Jan-Nov 2019

YTD Room Sales

**514,722**

▲ +19% vs Jan-Nov 2019

YTD Bed Sales

**902,216**

▲ +14% vs Jan-Nov 2019

### Room and Bed Occupancy

- Northern Ireland guesthouses, guest accommodation and B&Bs (GH/GA/BB) have had a positive January-November 2022 period, with figures indicating that this sector continues to be further along in its recovery than the hotel sector.
- January-November 2022 room occupancy is 3 percentage points above levels seen during the same period in 2019, whilst bed occupancy is up 1pp on the first eleven months of 2019.
- GH/GA/BB room occupancy in the month of November 2022 saw growth of 10pps compared to the same month in 2019, while bed occupancy increased by 7pps.
- Last month (October 2022), room and bed occupancy each increased by 7pps.

### Room and Bed Sales

- There have been over 514,000 rooms and more than 900,000 bed spaces sold in guesthouses, guest accommodation and B&Bs so far in 2022.
- NI GH/GA/BB room sales for January-November 2022 have increased by 19% compared to January-November 2019.
- Looking at individual monthly performance, room sales in November 2022 grew significantly (+45%) compared to November 2019. This follows on from increases of 28% and 31% respectively in the previous two months.
- November 2022 bed sales also saw large growth of 44%. This follows on from 42% and 12% increases respectively in October and September 2022.

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



## GH/GA/BB Performance

### January-November 2022

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**Source: NISRA**

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

Local Government District	Room Occupancy	Change vs 2019	Bed Occupancy	Change vs 2019
Antrim and Newtownabbey	35%	-2pps	32%	+7pps
Ards and North Down	29%	+5pps	27%	+10pps
Armagh City, Banbridge and Craigavon	27%	+1pp	24%	+2pps
Belfast City	64%	+10pps	46%	-1pps
Causeway Coast and Glens	30%	+3pps	27%	+4pps
Derry City and Strabane	35%	-1pp	32%	+2pps
Fermanagh and Omagh	31%	-5pps	24%	-2pps
Lisburn and Castlereagh	44%	+12pps	35%	+6pps
Mid and East Antrim	35%	+1pp	34%	+8pps
Mid Ulster	35%	-9pps	26%	-2pps
Newry, Mourne and Down	26%	No Change	20%	-1pp

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

\*\*pps = percentage points