



Hotel Performance

January-June 2023

Data are compared against pre-pandemic figures in January-June 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-June 2023

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January-June 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-June 2023 compared with 2019. Room occupancy for June 2023 fell by 1 percentage point and room sales declined by 8% compared to June 2019.

YTD Room Occupancy

65%

▲ +1pp vs Jan-June 2019

YTD Bed Occupancy

51%

▼ -1pp vs Jan-June 2019

YTD Room Sales

1,039,322

▼ -5% vs Jan-June 2019

YTD Bed Sales

1,832,415

No change vs Jan-June 2019

Room and Bed Occupancy

- Northern Ireland (NI) year-to-date (YTD) hotel room and bed occupancy figures sit at 65% and 51% 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 June 2023 (81%) was down by 1 percentage point compared to June 2019. Room occupancy in June 2023 also increased by 6 percentage points compared to last month (May 2023 – 75% room occupancy).
- NI's 2023 YTD hotel room occupancy is 4 percentage points higher than last year (January-June 2022).

Room and Bed Sales

- Room sales in the month of June 2023 declined by 8% compared to June 2019. We had previously seen a monthly increase in room sales in April 2023 vs 2019, and a monthly decrease for May 2023 vs 2019.
- YTD room sales remain 5% below January-June 2019. This is one percentage point lower than the figure reported in last month's report.
- Bed sales in June 2023 decreased by 2%. This followed from a 4% decline in bed sales reported in May 2023.
- YTD bed sales for January-June 2023 are on par with 2019.
- Compared to last year (2022), January-June 2023 room and bed sales are 2% and 1% below 2022 levels respectively.



Hotel Performance

January-June 2023

Data are compared against pre-pandemic figures in January-June 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

Performance during January-June 2023 varied across NI Local Government Districts (LGD). Belfast City recorded the highest room occupancy of all the NI LGDs (74%) 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-June 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	74%	+6pps	58%	+4pps
Causeway Coast and Glens	61%	-6pps	45%	+2pps
Derry City and Strabane	63%	-3pps	54%	+6pps
Fermanagh and Omagh	60%	-8pps	41%	-13pps
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-June 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-June 2023

Data are compared against pre-pandemic figures in January-June 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

YTD Room Occupancy

35%

▲ +5pps vs Jan-June 2019

YTD Bed Occupancy

32%

▲ +8pps vs Jan-June 2019

YTD Room Sales

242,618

▲ +22% vs Jan-June 2019

YTD Bed Sales

487,189

▲ +37% vs Jan-June 2019

Room and Bed Occupancy

- Northern Ireland guest houses, guest accommodation and B&Bs (GH/GA/BB) have had a positive January-June 2023 period, with room occupancy experiencing growth of 5 percentage points compared to 2019. Bed occupancy has seen larger growth of 8 percentage points.
- Looking at individual monthly performance, room occupancy in the month of June 2022 experienced growth of 6 percentage points compared to the same month in 2019, marking the sixth consecutive month of growth vs 2019.
- GH/GA/BB room and bed occupancy have increased by 10 percentage points and 7 percentage points respectively in comparison to last month (May 2023).

Room and Bed Sales

- There have been over 242,000 rooms and more than 487,000 bed spaces sold in guest houses, guest accommodation and B&Bs in January-June 2023
- NI GH/GA/BB room sales for January-June 2023 have increased by 22% compared to January-June 2019.
- Looking at individual monthly performance, room sales in June 2023 grew by 18% compared to June 2019. This follows on from increases of 10% in May, 18% in April, 26% in March, 13% in February 2019, and 73% in January 2019.
- Compared to last year (January-June 2022), GH/GA/BB room sales have increased by 3% in 2023.

Room and bed-space occupancy varied across Local Government Districts (LGDs) during January-June 2023. Belfast City LGD recorded the highest room occupancy (53%), while Lisburn & Castlereagh LGD recorded the largest increase in room occupancy compared with January-June 2019 (+14pps).



GH/GA/BB Performance

January-June 2023

Data are compared against pre-pandemic figures in January-June 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

GH/GA/BB room and bed-space occupancy by Local Government District January-June 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	27%	+3pps	24%	+5pps
Belfast City	53%	+7pps	44%	+3pps
Causeway Coast and Glens	33%	+11pps	32%	+13pps
Derry City and Strabane	41%	+10pps	35%	+9pps
Fermanagh and Omagh	31%	-2pps	31%	+8pps
Lisburn and Castlereagh	38%	+14pps	30%	+10pps
Mid and East Antrim	26%	-2pps	24%	+5pps
Mid Ulster	*	*	*	*
Newry, Mourne and Down	39%	+12pps	27%	+8pps

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

†pps = percentage points