



# Hotel Performance

## January–November 2023

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

*All figures correct as of 16/01/2024.*

*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 2023

Northern Ireland Statistics and Research Agency (NISRA) accommodation statistics for January–November 2023 indicate hotel room and bed occupancy experienced minor decreases compared with the same pre-pandemic period. Year-to-date sales were below those achieved during January–November 2019. Room occupancy for the month of November 2023 fell by 11 percentage points and room sales declined by 24% compared to November 2019.

YTD Room Occupancy

**66%**

▼ -2pp vs Jan–Nov 2019

YTD Bed Occupancy

**53%**

▼ -2pps vs Jan–Nov 2019

YTD Room Sales

**1,949,138**

▼ -9% vs Jan–Nov 2019

YTD Bed Sales

**3,548,897**

▼ -3% vs Jan–Nov 2019

### Room and Bed Occupancy

- Northern Ireland (NI) year-to-date (YTD) hotel room and bed occupancy figures sit at 66% and 53% respectively. These figures are just below the 2019 rates, with a 2 percentage point fall in both room and bed occupancy in 2023.
- Looking at individual monthly performance, room occupancy in November 2023 (49%) was down by 11 percentage points compared to November 2019. November room occupancy in 2023 decreased by 15 percentage points compared to last month (October 2023 – 64% room occupancy).
- NI's 2023 YTD hotel room occupancy is 2 percentage points lower than January–November 2022.

### Room and Bed Sales

- YTD room sales remain 9% below January–November 2019, which is 1% below the figure reported last month.
- Room sales in November 2023 decreased by 24% compared to November 2019, following monthly decreases in room sales in September and October 2023 vs 2019.
- YTD bed sales for January–November 2023 decreased by 9% compared with 2019.
- Bed sales in November 2023 decreased by 3% on 2019. This follows on from a 1% growth in bed sales in October 2023 v October 2019.
- Compared to 2022, January–November 2023 room and bed sales are 8% and 4% down, respectively.

Performance during January-November 2023 varied across NI's Local Government Districts (LGD).



## Hotel Performance

### January-November 2023

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**Hotel room and bed occupancy by Local Government District (January-November 2023)**

Local Government District	Room Occupancy	Change vs 2019	Bed Occupancy	Change vs 2019
Antrim and Newtownabbey	59%	No change	44%	+2pps
Ards and North Down	*	*	*	*
Armagh City, Banbridge and Craigavon	*	*	*	*
Belfast City	71%	-1pps	59%	+1pps
Causeway Coast and Glens	64%	-5pps	49%	+4pps
Derry City and Strabane	68%	+1pp	57%	+8pps
Fermanagh and Omagh	64%	-6pps	48%	-8pps
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-November 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-November  
2023

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

*All figures correct as of 16/01/2024.*

*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

**39%**

▲ +5pps vs Jan-Nov 2019

YTD Bed Occupancy

**33%**

▲ +6pps vs Jan-Nov 2019

YTD Room Sales

**502,249**

▲ +16% vs Jan-Nov 2019

YTD Bed Sales

**962,545**

▲ +22% vs Jan-Nov 2019

### Room and Bed Occupancy

- Northern Ireland (NI) guest houses, guest accommodation and B&Bs (GH/GA/BB) have had a positive January-November 2023 period, with room and bed occupancy experiencing an increase of 5 and 6 percentage points respectively compared to 2019.
- Looking at individual monthly performance, room occupancy in the month of November 2023 increased by 7 percentage points compared to the same month in 2019, following an increase of 7 percentage points in October 2023 v October 2019.
- GH/GA/BB room and bed occupancy both decreased by 8 percentage points in comparison to last month (October 2023).

### Room and Bed Sales

- More than 502,000 rooms and around 962,000 bed spaces were sold in guest houses, guest accommodation and B&Bs in January-November 2023.
- This represents growth of 16% and 22% respectively compared to January-November 2019.
- Looking at individual monthly performance, room sales in November 2023 increased by 30% compared to November 2019. This follows an increase of 17% in September 2023 compared with the same month in 2019.
- GH/GA/BB room sales for January-November 2023 are 2% lower than room sales in the same period in 2022.

Room and bed-space occupancy varied across Local Government Districts (LGDs) during January-November 2023. Belfast City LGD recorded the highest room occupancy (58%), while Lisburn and Castlereagh recorded the largest increase in room occupancy compared with January-November 2019 (+13pps).



## GH/GA/BB Performance

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*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-November 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	33%	+7pps	26%	+5pps
Belfast City	58%	+4pps	48%	+1pps
Causeway Coast and Glens	38%	+11pps	35%	+12pps
Derry City and Strabane	40%	+3pps	37%	+7pps
Fermanagh and Omagh	37%	+1pps	28%	+1pps
Lisburn and Castlereagh	44%	+13pps	34%	+6pps
Mid and East Antrim	23%	-10pps	26%	-1pps
Mid Ulster	*	*	*	*
Newry, Mourne and Down	38%	+12pps	27%	+7pps

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

†pps = percentage points