

Northern Ireland Hotel Performance

January – March 2016



Hotels

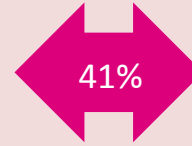


Room occupancy Jan-Mar 2016



-5pps on
Jan-Mar 2015
No change on
Jan-Mar 2014

Bed-space occupancy Jan-Mar 2016



-3pps on
Jan-Mar 2015
+6pps on
Jan-Mar 2014

Source: NISRA
pps = percentage point

2015 was an excellent year for hotels in Northern Ireland (NI). While the year to date (Jan- Mar 2016) figures for hotels haven't been able to match those achieved during Jan-Mar 2015, bed-spaces sold are still well above those recorded for the first 3 months of 2014.

- Overall **Jan-Mar 2016** hotel room and bed-space occupancy was down compared with the same period in 2015
- Hotel capacity over the Jan-Mar 2016 period remained unchanged compared with Jan-Mar 2015, with 136 hotels operating 7,851 rooms and 17,609 bed-spaces
- The number of rooms sold during Jan-Mar 2016 decreased by 7% to 382,427
- Bed-spaces sold during Jan-Mar 2016 recorded a decrease of 4% to 661,895
- Jan-Mar 2016 also saw some variations in performance by Local Government Districts and classification, with 4/5* hotel continuing to achieve the highest levels



382,427

Rooms sold



Down 7% on
Jan-Mar 2015



No change on
Jan-Mar 2014

661,895

Bed-spaces sold



Down 4% on
Jan-Mar 2015

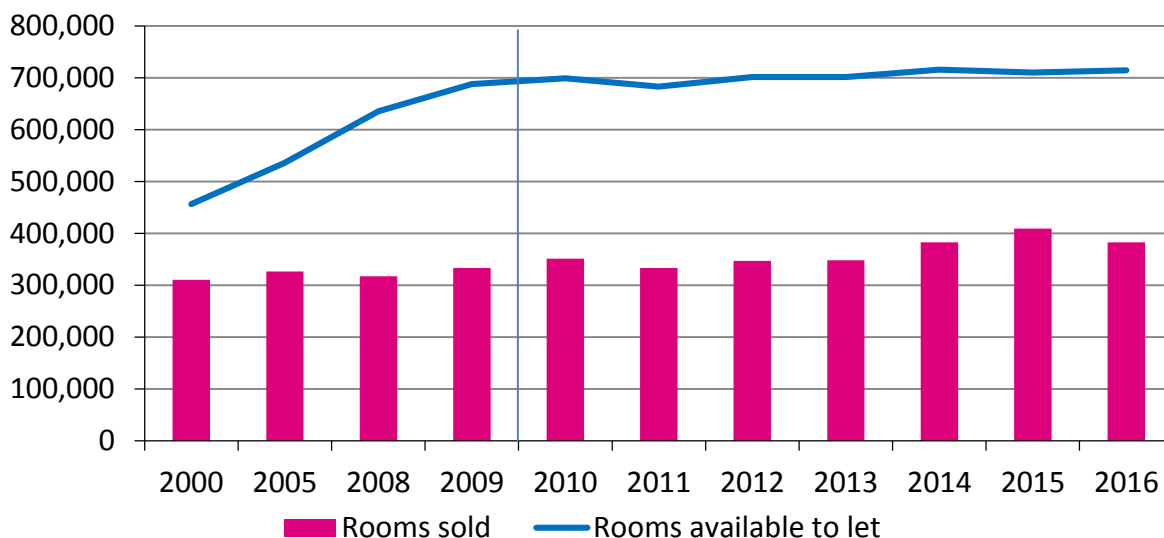


Up 18% on
Jan-Mar 2014

Source: NISRA

Trends in hotel rooms sold and hotel room stock availability

- The following chart shows both available room capacity and the estimated number of hotel rooms sold in Northern Ireland during the Jan-Mar period between 2000-2016
- At end March 2016, there were 7,851 rooms and 17,609 bed-spaces available in hotels across Northern Ireland, an increase of 57% in room stock and 56% in bed-space stock compared to year end 2000



Source: Rooms sold 2000-2009 Tourism NI 2010-2016 NISRA

Stock 2000- 2016 Tourism NI (note: capacity is based on end March and grossed up by number of days available for the period Jan-Mar)

Rooms available by Local Government District (as at end Mar 2016)				
LGD	Number Hotels	Rooms Available	Bed-spaces Available	% of total rooms
Antrim and Newtownabbey	10	631	1,295	8%
Armagh City, Banbridge and Craigavon	7	206	529	3%
Ards and North Down	7	299	606	4%
Belfast City	32	3,386	7,130	43%
Causeway Coast and Glens	20	723	1,942	9%
Derry City and Strabane	12	690	1,663	9%
Fermanagh and Omagh	11	415	973	5%
Lisburn and Castlereagh City	4	255	593	3%
Mid and East Antrim	12	479	1,063	6%
Mid Ulster	9	238	588	3%
Newry, Mourne and Down	12	529	1,227	7%
All Hotels	136	7,851	17,609	

Hotel performance by Local Government District, January – March 2016

- Performance varied across Northern Ireland Local Government Districts with 5 Districts recording increases and 4 experiencing declines
- The steepest declines in hotel occupancy during Jan-Mar 2016 were evident for Belfast, showing a 10 percentage point decrease in room occupancy and a 4 percentage point decrease in bed-space occupancy
- The Mid and East Antrim also experienced steep declines in room and bed-space occupancy of 8 and 6 percentage points respectively
- Hotels in the Fermanagh and Omagh District experienced a decrease of 3 percentage points in room occupancy while bed-space occupancy declined by 2 percentage points
- Room occupancy for hotels in Antrim and Newtownabbey remained on par with Jan-Mar 2015 while bed-space occupancy declined by 3 percentage points
- The Ards and North Down recorded the lowest room occupancy of 45%, albeit showing increases in room and bed-space occupancy of 2 and 1 percentage points respectively
- The Causeway Coast and Glens recorded a room occupancy of 50% and bed-space occupancy of 33% the highest levels recorded for this District for some years
- The Mid Ulster and Newry, Mourne & Down Districts experienced increases in room occupancy to record levels of 47% and 48% respectively, also the highest levels recorded for these Districts for some years
- Hotels in Derry City and Strabane District saw an increase of 3 percentage points in room (50%) occupancy while bed-space (37%) occupancy remained at the same level recorded for Jan-Mar 2015

	2012		2013		2014		2015		2016		Change 2015/ 2016*	
	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (pps)	Bed-space (pps)
Antrim and Newtownabbey	37	25	36	22	46	31	46	35	46	31	0	-3
Ards and North Down	37	25	43	31	46	37	43	35	45	37	+2	+1
Armagh City, Banbridge and Craigavon	37	21	51	27	63	44	#	#	#	#	#	#
Belfast City	57	44	56	44	64	39	70	53	60	49	-10	-4
Causeway Coast and Glens	46	30	47	32	47	28	49	31	50	33	+1	+2
Derry City and Strabane	46	33	54	37	47	35	46	37	50	37	+3	0
Fermanagh and Omagh	63	48	51	40	48	42	55	44	52	42	-3	-2
Lisburn and Castlereagh City	#	#	#	#	#	#	#	#	#	#	#	#
Mid and East Antrim	53	36	46	36	49	38	58	46	49	39	-8	-6
Mid Ulster	42	29	33	22	38	25	44	31	47	34	+4	+3
Newry, Mourne and Down	38	32	47	35	39	30	46	34	48	38	+2	+4
All Hotels‡	50	37	50	37	54	35	59	44	54	41	-5	-3

Source: NISRA

* Differences between years are calculated on unrounded figures

† Figures have been calculated excluding hotels who have not provided the appropriate breakdown of information

Sample size too small to provide a reliable estimate

‡ All hotels includes those in the Armagh, Banbridge and Craigavon District and Lisburn and Castlereagh District

Hotel performance by classification, January – March 2016

- During Jan-Mar 2016 hotels classified as 4/5 star saw a 6 percentage point decrease in room occupancy and a 2 percentage point decrease in bed-space occupancy
- Average room occupancy (52%) for 3 star hotels increased by 1 percentage point and narrows the gap in terms of occupancy performance achieved by the higher classified hotels

	2012		2013		2014		2015		2016		Change 2015/2016*	
	Room (%)	Bed-space† (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (pps)	Bed-space (pps)
4/5 star	50	39	56	40	60	38	62	46	55	44	-6	-2
3 star	45	29	46	36	51	33	51	38	52	38	+1	0
2 star	#	#	29	21	31	20	#	#	#	#	#	#
1 star	#	#	#	#	#	#	#	#	#	#	#	#
All Hotels‡	50	37	50	37	54	35	59	44	54	41	-5	-3

Source: NISRA

* Differences between years are calculated on unrounded figures

† Figures have been calculated excluding hotels who have not provided the appropriate breakdown of information

Sample size too small to provide a reliable estimate

‡ All hotels includes those unclassified, 1 star and 2 star

Hotel performance by size, January – March 2016

- During Jan-Mar 2016 hotels with less than 25 rooms recorded an increase of 2 percentage points for both room and bed-space occupancy
- Hotels within the 26-50 size category saw room occupancy decrease by 6 percentage points while bed-space occupancy increased by 2 percentage points, suggesting more multiple occupancy of rooms
- Hotels within the 51-100 and 100+ size category experienced room occupancy decreases of 4 and 7 percentage points respectively

	2012		2013		2014		2015		2016		Change 2015/2016*	
	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (pps)	Bed-space † (%)
Less than 25	38	27	37	25	35	24	39	27	41	29	+2	+2
26-50	44	28	38	25	49	30	51	34	45	36	-6	+2
51-100	51	35	54	38	51	37	55	45	52	38	-4	-6
100+	55	43	55	43	61	38	68	50	61	48	-7	-2
All Hotels	50	37	50	37	54	35	59	44	54	41	-5	-3

Source: NISRA

* Differences between years are calculated on unrounded figures

† Figures have been calculated excluding hotels who have not provided the appropriate breakdown of information

Hotel performance by price (per person per night), January – March 2016

- No hotels within the price category were able to record increases in room occupancy during Jan-Mar 2016
- The steepest declines in hotel occupancy during Jan-Mar 2016 were evident for those hotels within the £50-£59.99 price category

	2012		2013		2014		2015		2016		Change 2015/2016*	
	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (%)	Bed-space † (%)	Room (pps)	Bed-space † (%)
Less than £40	#	#	#	#	#	#	#	#	#	#	#	#
£40-£49.99	42	29	40	28	47	31	50	32	46	33	-4	+1
£50-£59.99	41	31	48	33	58	43	62	48	43	32	-19	-16
£60+	52	39	52	39	54	35	59	45	55	43	-4	-2
All Hotels‡	50	37	50	37	54	35	59	44	54	41	-5	-3

Source: NISRA

* Differences between years are calculated on unrounded figures

† Figures have been calculated excluding hotels who have not provided the appropriate breakdown of information

Sample size too small to provide a reliable estimate

‡ All hotels include those priced less than £40

Hotel performance March 2015

- During March 2016 hotel room occupancy decreased by 3 percentage points while bed-space occupancy experienced an increase of 2 percentage points, possibly indicating increases in multiple occupancy rooms
- The number of rooms sold during March decreased by 4% while bed-spaces sold experienced an increase of 4%

Difference between years are calculated on unrounded figures

HOTEL OCCUPANCY 2010-2016

		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	ANNUAL AVERAGE
2016	Room	41	58	62										
	Bed-space	30	45	49										
2015	Room	50	61	65	70	76	79	73	81	74	65	56	51	67*
	Bed-space	36	48	47	53	58	58	59	65	54	49	41	41	51*
2014	Room	48	59	55	67	71	73	72	81	73	64	62	49	65
	Bed-space	30	36	40	46	49	54	54	60	52	47	43	37	46
2013	Room	43	54	53	59	68	77	74	82	74	68	60	49	64
	Bed-space	28	41	42	43	49	53	51	63	49	48	43	38	46
2012	Room	42	54	56	67	68	77	75	81	75	64	57	50	64
	Bed-space	31	39	41	52	52	55	59	64	52	45	39	36	47
2011	Room	40	51	52	55	60	68	64	71	66	61	53	46	57
	Bed-space	28	36	36	42	43	50	50	57	47	43	39	35	42
2010	Room	41	57	56	47	64	69	68	69	68	59	53	42	58
	Bed-space	28	39	39	39	42	51	54	56	48	45	36	33	43

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