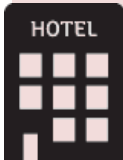


# Northern Ireland Hotel Performance

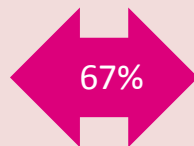
January – July 2016



## Hotels

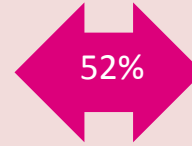


**Room occupancy**  
Jan-July 2016



-1pp  
Jan-July 2015

**Bed-space occupancy**  
Jan-July 2016



+1pp on  
Jan-July 2015

Source: NISRA  
pp = percentage point

**Following a slower start to the year Northern Ireland hotels achieved record room occupancy levels in both June and July 2016 (82% and 84% respectively)**

- At the end of July 2016 there were 136 hotels operating in NI with 7,852 rooms and 17,613 bed-spaces, this represents a marginal increase on the same period for 2015
- Increases in capacity can cause declines in occupancy, the increase in capacity means there are more rooms/bed-spaces to fill
- Following a slow start to the year compared to the first half of 2015, June saw hotel room demand growing, with July occupancy reaching 84%, (plus 12 percentage point increase)
- However, this late upturn in demand had little impact on the year-to-date occupancy, with hotel room occupancy at 67% (-1 percentage point) and bed-space occupancy of 52% (+1 percentage point)
- The number of hotel rooms sold during Jan-July 2016 saw no change compared to Jan-July 2015, while hotel bed-spaces sold during Jan-July 2016 recorded an increase of 2% to 1,932,300
- Performance varied across Northern Ireland Local Government Districts. During Jan-July 2016 the Mid Ulster District saw the highest increases in occupancy rates with a 6 percentage point increase in room occupancy and a 3 percentage point increase in bed-space occupancy
- While 4\* and 5\* hotels suffered declines in room occupancy (-3 percentage points), 3\* hotels realised a growth in room occupancy (+4 percentage points)
- Competitor occupancy figures are not available for July 2016, however during Jan-June hotels in England and Scotland indicate no change in room occupancy



**1,122,300**

Rooms sold



No change on  
Jan-July 2015

**1,932,300**

Bed-spaces sold

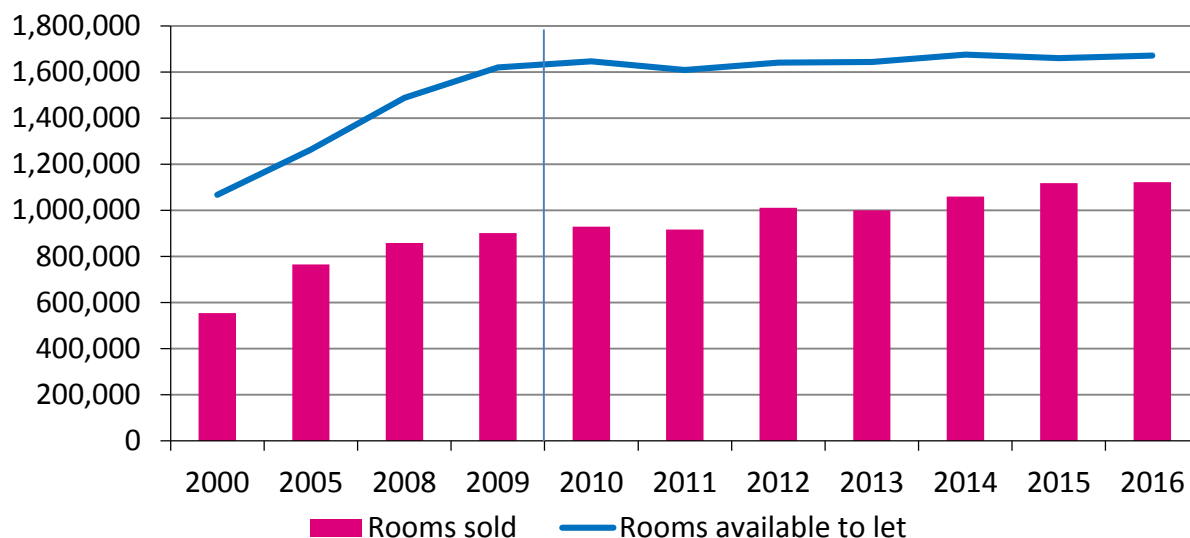


Up 2% on  
Jan-July 2015

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-July period between 2000-2016
- At end July 2016, there were 7,852 rooms and 17,613 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 June and grossed up by number of days available for the period Jan-July)

Rooms available by Local Government District (as at end July 2016)				
LGD	Number Hotels	Rooms Available	Bed-spaces Available	% of total rooms
Antrim and Newtownabbey	10	631	1,295	8%
Ards and North Down	7	299	606	4%
Armagh City, Banbridge and Craigavon	7	206	529	3%
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	7,852	17,613	

## Hotel performance by Local Government District, January – July 2016

- Performance varied across Northern Ireland Local Government Districts with most Districts enjoying a more positive Jan-July performance
- During Jan-July 2016 the Belfast area continued to attract the highest hotel demand despite a 3 percentage point decline in room (76%) occupancy, while bed-space occupancy increased by 2 percentage points, suggesting more multiple occupancy of rooms
- The Mid Ulster District enjoyed the highest increase in room occupancy, +6 percentage points, to record a room occupancy of 52%, the highest level recorded for this District for some years
- 2015 was a very good year for Northern Ireland Hotels, when 2016 figures are compared with the same period in 2014 (rather than 2015) growth is evident for all areas

	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	48	35	47	31	58	41	62	46	62	43	0	-3
Ards and North Down	50	39	52	36	56	44	54	45	58	51	+3	+6
Armagh City, Banbridge and Craigavon	42	38	52	31	59	44	59	39	#	#	#	#
Belfast City	71	56	68	51	73	48	79	61	76	62	-3	+2
Causeway Coast and Glens	59	38	58	39	59	38	59	38	62	38	+3	-1
Derry City and Strabane	59	44	68	47	57	43	60	47	63	47	+3	0
Fermanagh and Omagh	67	53	58	41	57	49	59	49	60	50	+1	+1
Lisburn and Castlereagh City	#	#	#	#	#	#	#	#	#	#	#	#
Mid and East Antrim	57	45	53	42	61	48	65	52	63	50	-2	-2
Mid Ulster	45	31	41	29	43	30	46	36	52	39	+6	+3
Newry, Mourne and Down	56	44	59	44	50	39	55	42	58	45	+3	+3
All Hotels‡	63	48	61	44	64	44	68	51	67	52	-1	+1

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 – July 2016

- During Jan-July 2016 3 star hotel room occupancy (67%) increased by 4 percentage points, bringing it to the level in terms of demand with 4/5\* hotels (66% average room occupancy), with the latter recording a decline in room occupancy

	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	63	49	67	48	67	47	69	52	66	54	-3	+2
3 star	57	39	56	40	58	39	63	47	67	47	+4	0
2 star	#	#	41	30	44	31	#	#	#	#	#	#
1 star	#	#	#	#	#	#	#	#	#	#	#	#
All Hotels‡	63	48	61	44	64	44	68	51	67	52	-1	+1

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 – July 2016

- During Jan-July 2016 hotels with less than 25 rooms recorded an increase in room occupancy while bed-space occupancy fell, the opposite was evident for hotels within the 100+ size category with room occupancy decreasing while bed-space occupancy experienced an increase
- Smaller establishments, on average, attracted the lowest levels of demand. However, one third of hotels fall into this category, of varying levels of quality, some of which may have achieved significantly higher levels of occupancy
- Hotels within the 51-100 category recorded decreases in both room and bed-space occupancy
- Hotels within the 26-50 size category saw no change in room occupancy while bed-space occupancy increased by 4 percentage points, suggesting more multiple occupancy of rooms
- The largest establishments, primarily 3\*-5\*, attract the highest demand

	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	49	36	46	33	45	33	50	36	52	35	+2	-1
26-50	54	38	51	33	57	42	60	46	61	51	0	+4
51-100	63	45	64	43	62	46	66	51	65	49	-1	-2
100+	70	55	67	50	71	46	75	56	74	58	-1	+2
All Hotels	63	48	61	44	64	44	68	51	67	52	-1	+1

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 – July 2016

- Hotels within the £60+ price category attract the highest hotel demand (66% room occupancy)
- All hotels within the price category recorded declines in room occupancy, the steepest declines during Jan-July 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	49	34	49	34	55	37	59	39	56	41	-3	+2
£50-£59.99	49	37	57	41	66	48	67	50	52	31	-15	-19
£60+	64	48	61	44	62	42	68	51	66	51	-2	-1
All Hotels‡	63	48	61	44	64	44	68	51	67	52	-1	+1

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 July 2016

- During July 2016 hotel room occupancy increased by 12 percentage points while bed-space occupancy increased by 11 percentage points compared with July 2015
- The number of rooms sold during July increased by 17% while bed-spaces sold experienced an increase of 20%. **This represents the highest recorded rooms (204,750) and bed-spaces (380,300) sold for the month of July since records began (previous highest was July 2015)**

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	68	74	82	<b>84</b>						
	Bed-space	30	45	49	53	56	58	<b>70</b>						
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	50
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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