



**TOURISM
NORTHERN
IRELAND**

Self-Catering

Performance Report

January - December 2024

Data Source:  **lighthouse**

Lighthouse accommodation statistics for January-December 2024 indicate that, similar to previous reports, NI self-catering occupancy remains marginally behind 2023, impacted by an increase in the number of self-catering properties available this year. Year-to-date reserved nights has increased by 14% and ADR has seen growth of 6% vs January-December 2023. Average length of stay for those booking self-catering accommodation has declined slightly vs the same period in 2023.

YTD Occupancy

49%

-1pp vs Jan-Dec 2023

YTD ADR

£147.83

+6% vs Jan-Dec 2023

YTD Reserved Nights

1.0m

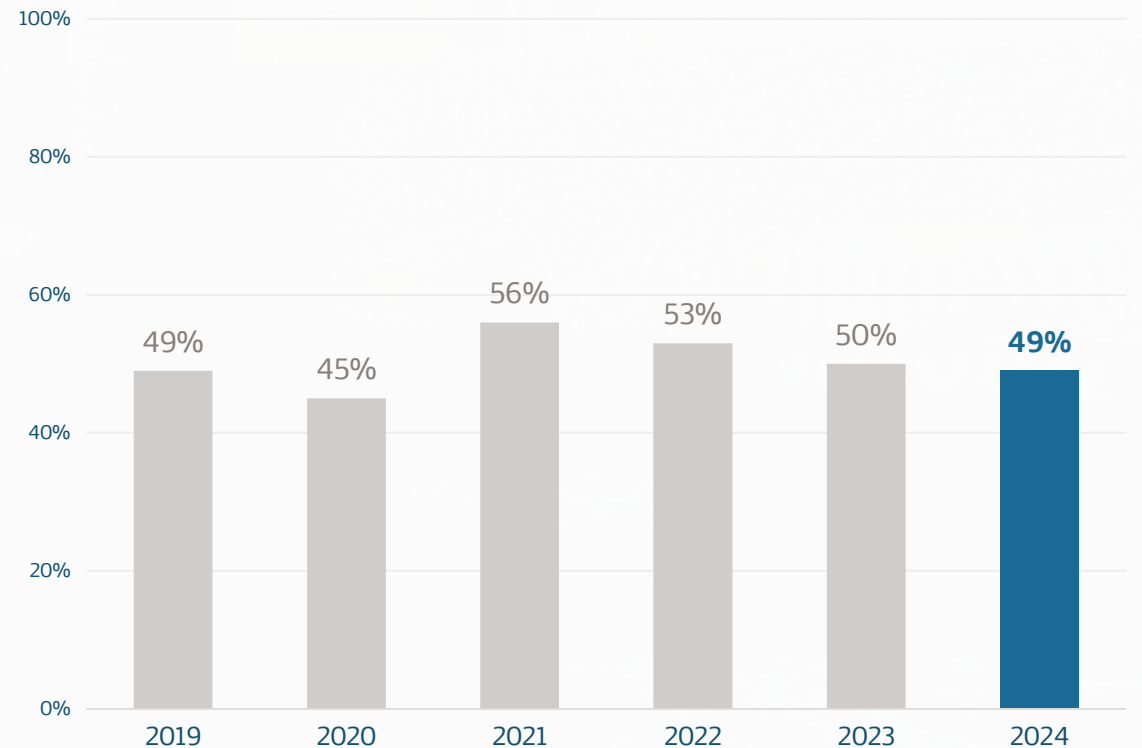
+14% vs Jan-Dec 2023

YTD Average Stay

3.7 Nights

-0.11 Nights vs Jan-Dec 2023

2024 Jan-Dec YTD Occupancy vs previous years



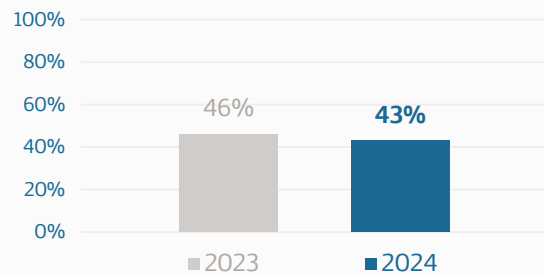
- Occupancy:** Reserved nights in NI self-catering accommodation divided by available nights.
- Average Daily Rate:** The average price paid for one night in NI self-catering accommodation.
- Reserved Nights:** The number of nights booked in NI self-catering accommodation.
- Average Stay:** The average length of stay in NI self-catering accommodation.

Lighthouse accommodation statistics for December 2024 indicate that monthly occupancy in self-catering accommodation was 43%, 3 percentage points below levels seen last year. Encouragingly, reserved nights experienced growth of 3% and ADR increased slightly compared to the same month in 2023. Comparing performance in December against last month (November 2024), occupancy has increased by 3-percentage points and reserved nights have increased by 10%. ADR increased by 4% vs last month, likely impacted by the festive period.

NI Monthly Self-Catering Performance - December 2024

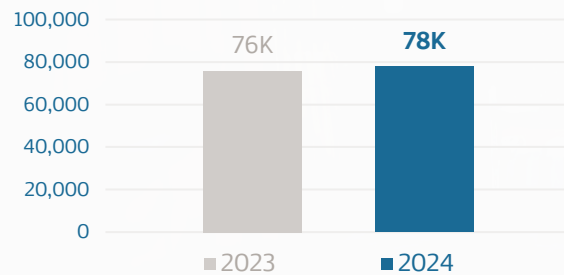
Occupancy vs December 2023

-3pps

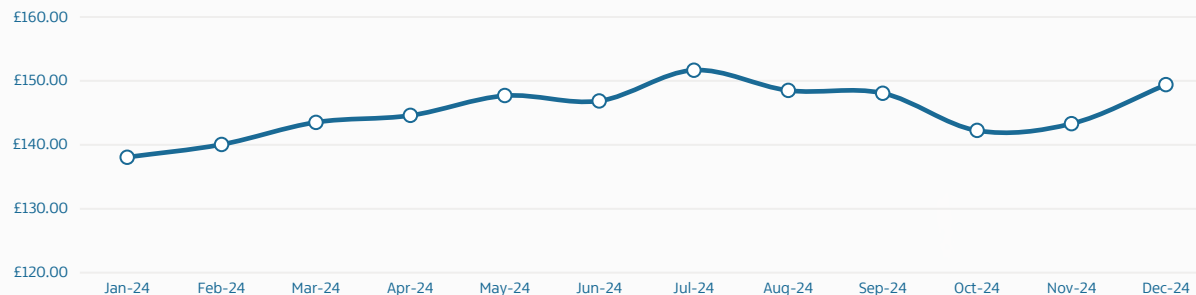


Reserved Nights vs December 2023

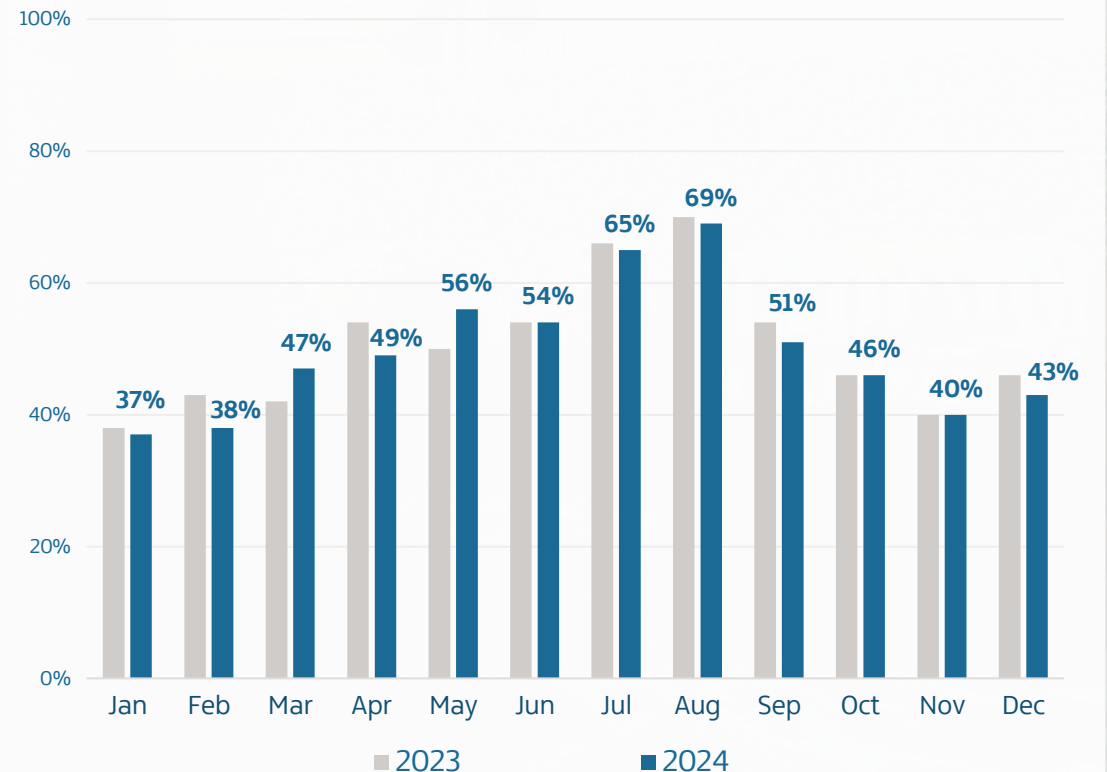
+3%

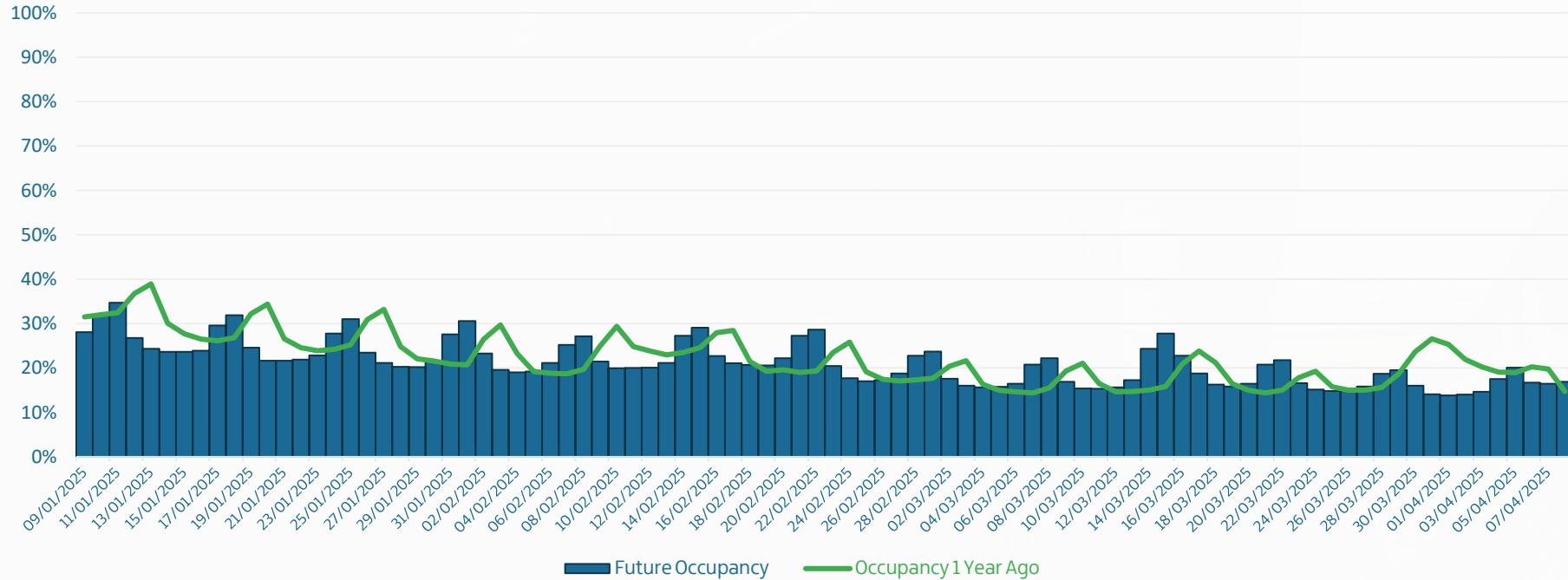


ADR over the last 12 months



NI Occupancy by Month vs previous year





Average Occupancy
(Next 3 months)

21%

▼ **-1pp vs last year**



Reserved Nights
(Next 3 months)

108,713

▲ **+1% vs last year**

Forward booking data shows the proportion of self-catering accommodation supply (%) that has been booked in for a specific future time period. Note, this is not a forecast or prediction of where occupancy will finish but a snapshot in time.

- Forward looking data for the NI self-catering accommodation sector (as at 09/01/2025) reveals that daily occupancy on the books is exceeding the same period last year for 37/90 days in this outlook.
- Forward looking occupancy currently peaks at 35% on 11/01/24. Peak occupancy in this outlook is 4 percentage points behind the same period last year.
- The occupancy trend is largely similar to last year although occupancy on the books at the end of March/start of April is noticeably behind last year, likely related to the early Easter in 2024. Easter 2025 is on the 20th April and occupancy for this period is not available in this outlook.

Notes:

- Lighthouse is a commercial travel and hospitality data platform specialising in real-time short term rental accommodation data, derived from listings on Airbnb, Booking.com, Vrbo and Tripadvisor.
- Analysis presented in this report relates to Tourism Northern Ireland's definition of 'Self-Catering Accommodation', defined as "a self-contained apartment, house, cottage, etc. which provides furnished accommodation for visitors including sleeping, dining and lounge areas and full catering facilities."
- Based on this definition, shared and private rooms have been excluded from the analysis and therefore this data should only be used as an indication of the self-catering sector's performance.
- If comparing this data against other self-catering accommodation performance sources, differing methodologies should be considered.



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