



**TOURISM
NORTHERN
IRELAND**

Self-Catering

Performance Report

January - April 2024

Data Source:  lighthouse

Lighthouse short-term rental accommodation statistics for January-April 2024 indicate that NI self-catering room occupancy experienced a 1-percentage point decrease compared with 2023. Despite a significant increase in the number of self-catering properties available in this year in comparison to 2023, year-to-date room occupancy remains close to levels seen in 2023. Year-to-date reserved nights has increased by 15% and Year-to-date ADR has seen growth of almost one-tenth. Encouragingly those who have stayed in NI self-catering accommodation are staying longer than they did last year. Forward-looking occupancy data is looking very positive for the next 90 days.

YTD Occupancy

43%

-1pp vs Jan-Apr 2023

YTD ADR

£141.79

+9% vs Jan-Apr 2023

YTD Reserved Nights

278,718

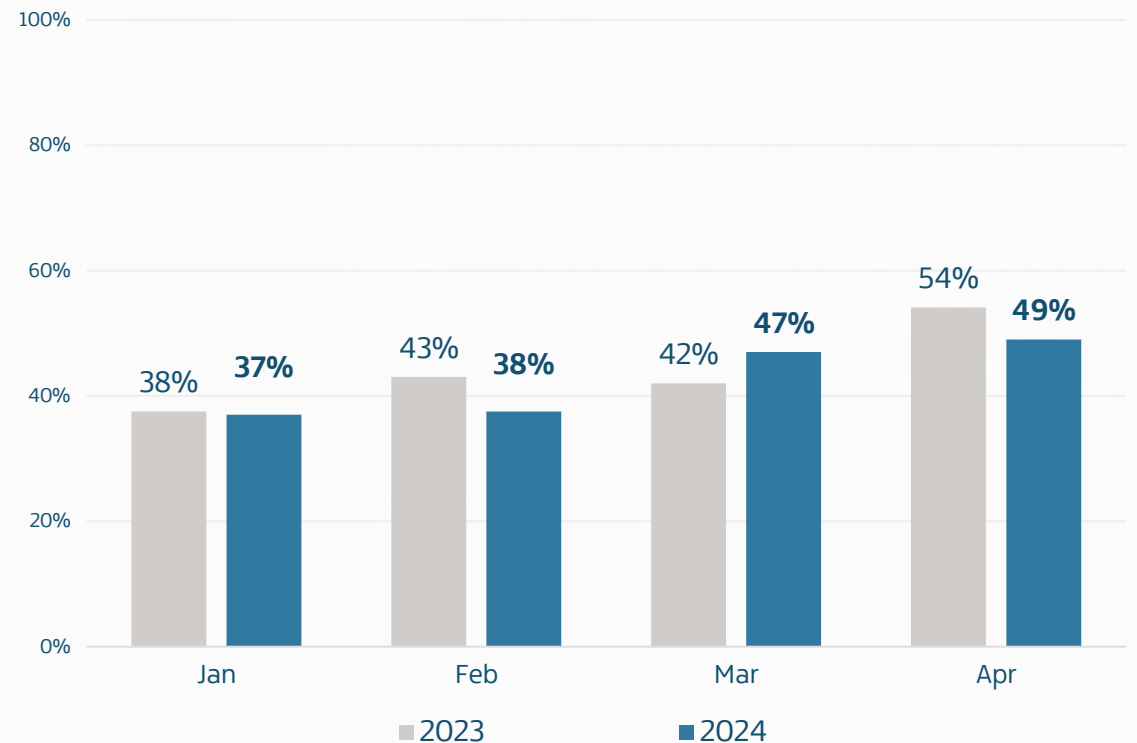
+15% vs Jan-Apr 2023

YTD Average Stay

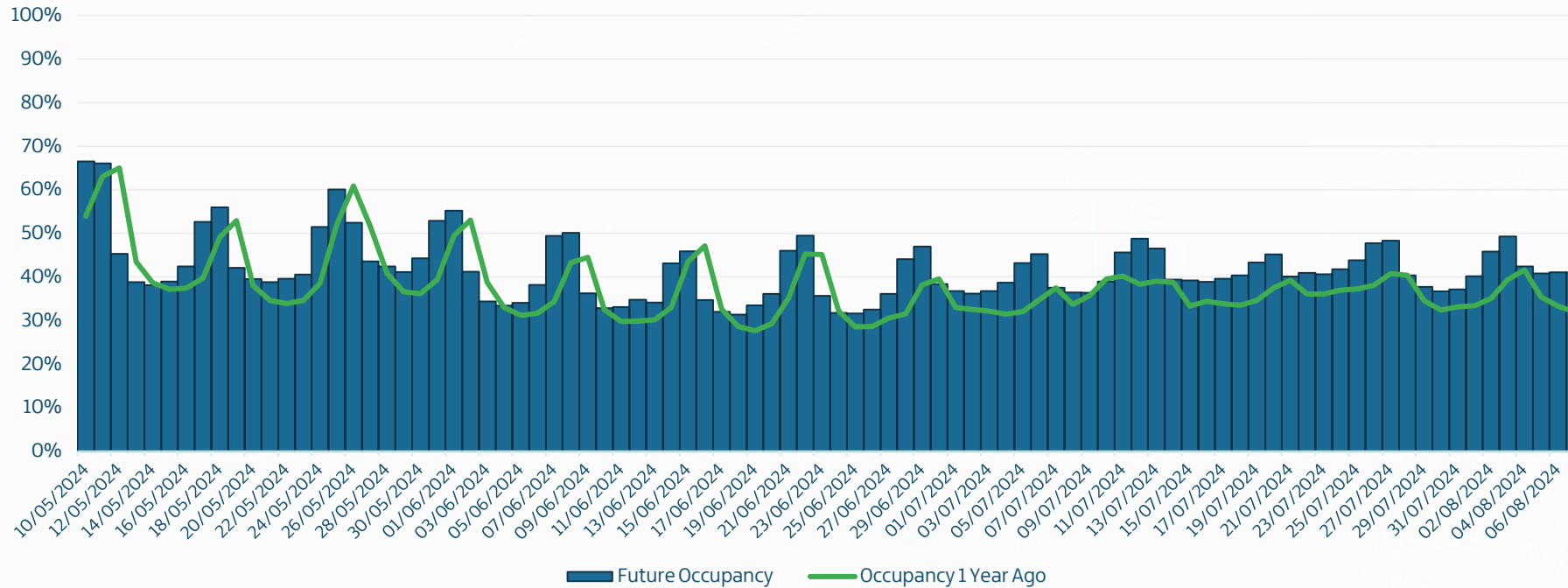
4.2 days

+4% vs Jan-Apr 2023

2024 Occupancy by Individual Month vs 2023



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




Average Occupancy
(Next 3 months)

42%

▲ +4pps vs last year



Reserved Nights
(Next 3 months)

204,066

▲ +21% 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 daily occupancy for the NI self-catering accommodation sector (as at 10/05/2024) reveals that daily occupancy on the books is exceeding the same period last year for 63/90 days in this outlook.
- Forward looking occupancy currently peaks at 67% on 10/05/24. Peak occupancy in this outlook is above the peak occupancy seen over this period 2023. Previous pacing data suggested that occupancy on the books was strong during the bank holiday weekend at the beginning of May.
- The occupancy trend is largely similar to last year, with small increases in occupancy at weekends. Encouragingly, current occupancy on the books is exceeding 2023 levels for most dates in July and early August.

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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