



**TOURISM
NORTHERN
IRELAND**

Self-Catering

Performance Report

January - November 2024

Data Source:  **lighthouse**

Lighthouse accommodation statistics for January–November 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 compared to 2023. Year-to-date reserved nights has increased by 15% and ADR has seen growth of almost 7% vs January–November 2023. Average length of stay for those booking self-catering accommodation has declined slightly vs the same period in 2023. Forward-looking occupancy data is mixed in December compared to last year but the current snapshot for early 2025 is encouraging.

YTD Occupancy

50%

-1pp vs Jan–Nov 2023

YTD ADR

£147.56

+7% vs Jan–Nov 2023

YTD Reserved Nights

942,000

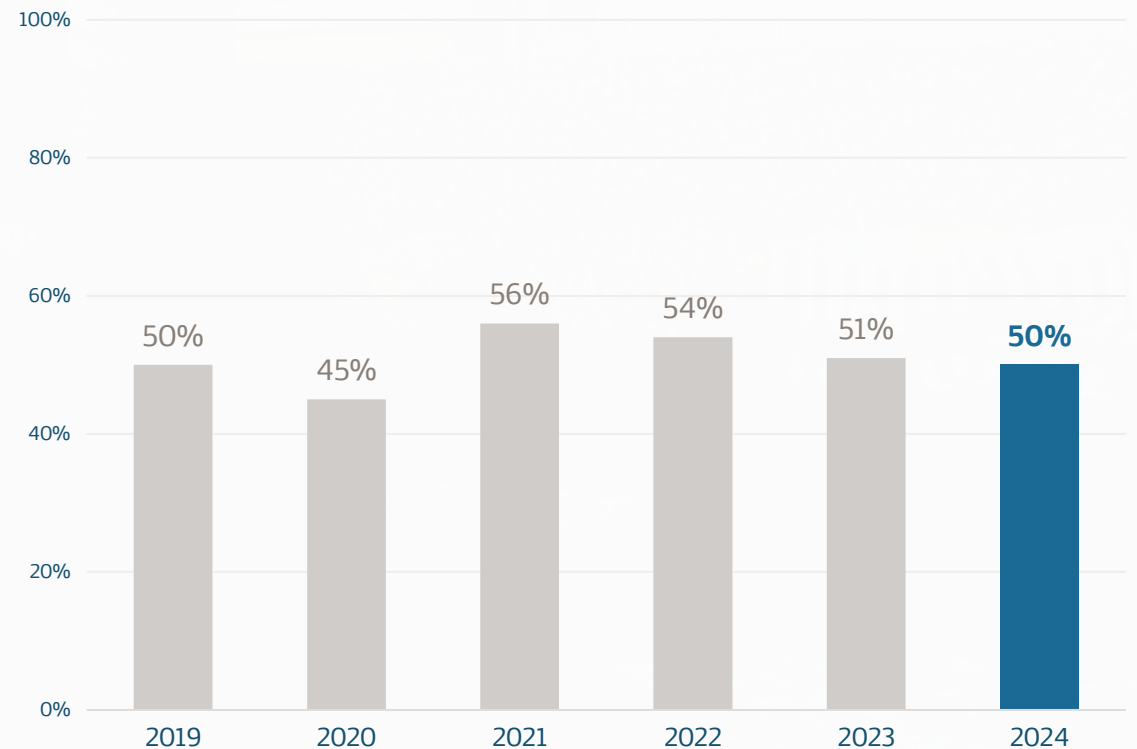
+15% vs Jan–Nov 2023

YTD Average Stay

3.7 days

-4% vs Jan–Nov 2023

2024 Jan–Nov YTD Occupancy vs previous years



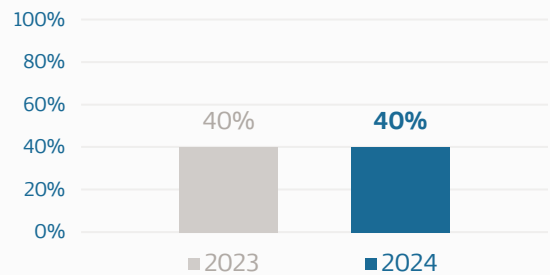
- Occupancy:** Reserved nights in NI self-catering accommodation divided by available nights.
- Average Daily Rate:** The average price paid for one night in NI self-catering accommodation.
- Reserved Nights:** The number of nights booked in NI self-catering accommodation.
- Average Stay:** The average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

Lighthouse accommodation statistics for November 2024 indicate that monthly occupancy in self-catering accommodation was 40%, the same occupancy recorded in November last year. Encouragingly, reserved nights experienced growth of 12% and ADR increased slightly compared to the same month in 2023. Comparing performance in November against last month (October 2024), occupancy has fallen by 6-percentage points and reserved nights have declined by 16%. In contrast, ADR increased by 1% vs last month.

NI Monthly Self-Catering Performance - November 2024

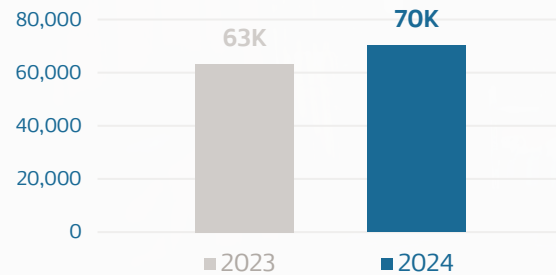
Occupancy vs November 2023

No Change

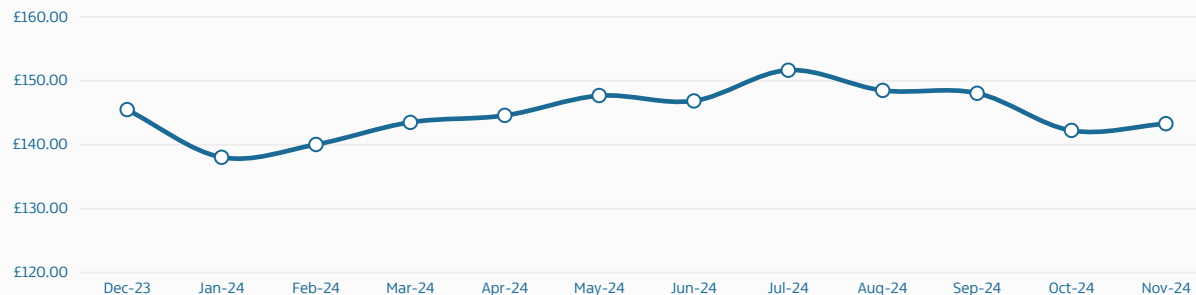


Reserved Nights vs November 2023

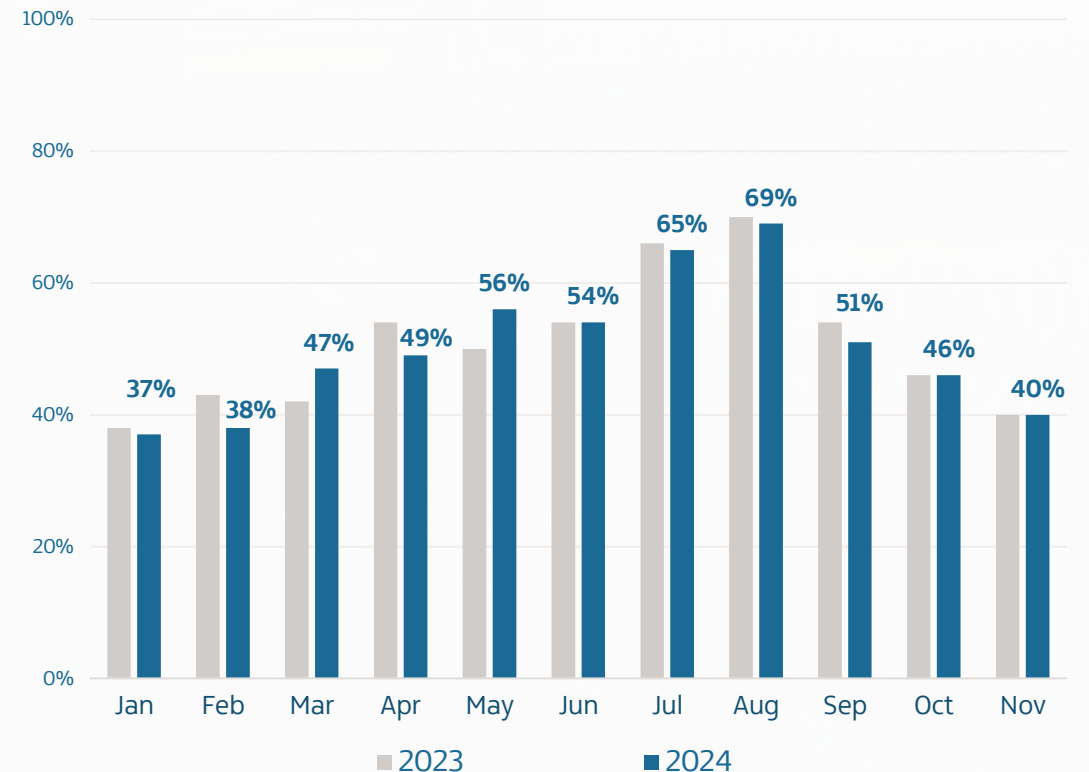
+12%

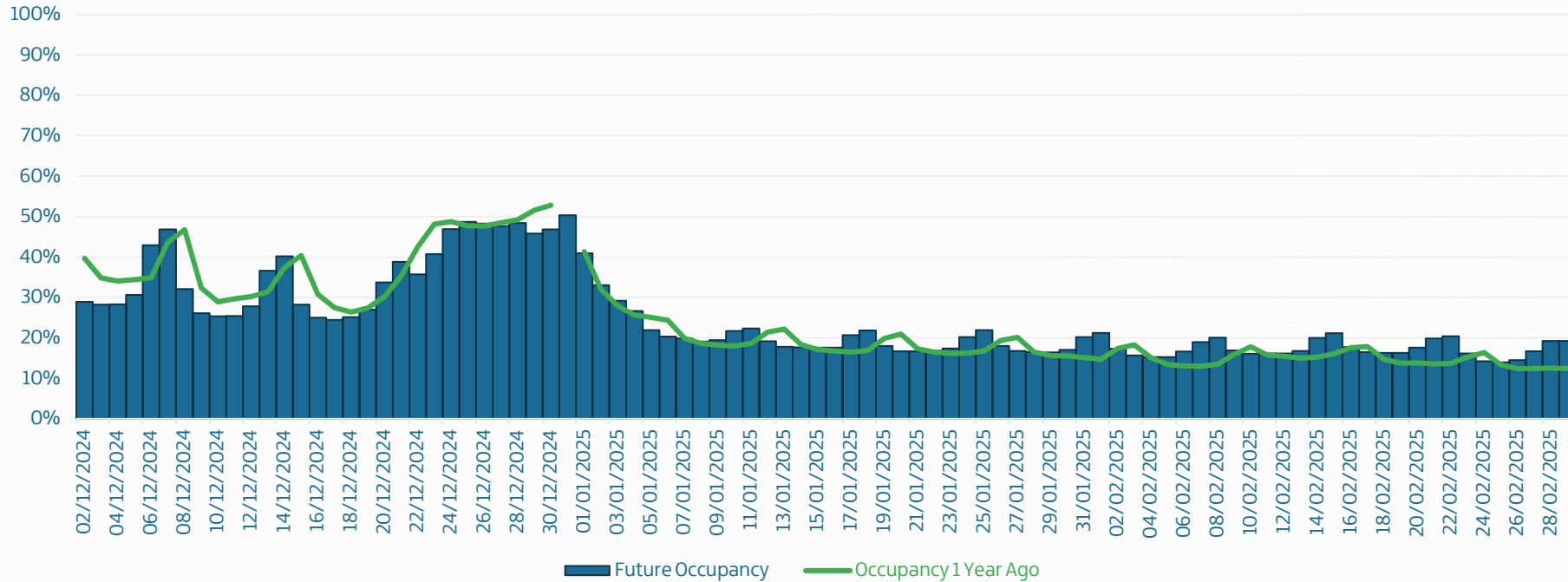


ADR over the last 12 months



NI Occupancy by Month vs previous year





Average Occupancy
(Next 3 months)

25%

▲ +1pp 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 02/12/2024) reveals that daily occupancy on the books is exceeding the same period last year for 52/90 days in this outlook.
- Forward looking occupancy currently peaks at 50% on New Year’s Eve. Peak occupancy in this outlook marginally behind the same period last year.
- The occupancy trend is largely similar to last year although occupancy on the books in December is largely behind levels seen in 2023. Looking ahead, occupancy in February 2025 is currently ahead of last year for 23/28 days in that month.

Reserved Nights
(Next 3 months)

125,735

▲ +9% vs last year

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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