



TOURISM  
NORTHERN  
IRELAND

# Self-Catering

## Performance Report

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January-June 2025

Data Source:  lighthouse

Lighthouse short-term rental accommodation statistics for January-June 2025 indicate that NI self-catering occupancy is slightly behind last year. While the overall occupancy rate has declined, this doesn't show the full picture, as the supply of self-catering properties is significantly higher than last year. Encouragingly, year-to-date reserved nights have increased by 4% and year-to-date ADR has seen growth of 6%. Average length of stay for those booking self-catering accommodation is marginally behind the same period in 2024. Forward-looking occupancy data is looking positive for the next 90 days.

### YTD Occupancy

44%

-3pps vs Jan-June 2024

### YTD ADR

£153.87

+6% vs Jan-June 2024

### YTD Reserved Nights

487,711

+4% vs Jan-June 2024

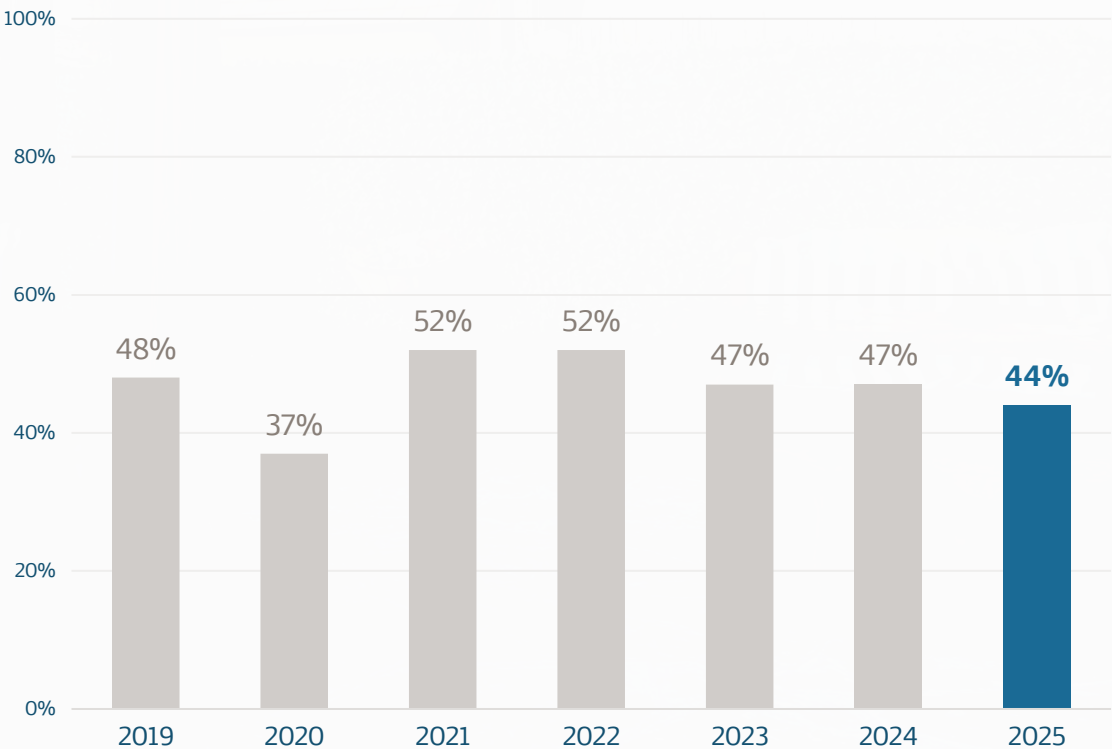
### YTD Average Stay

3.6 nights

-0.3 nights vs Jan-June 2024

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.

### 2024 Jan-June YTD Occupancy vs previous years

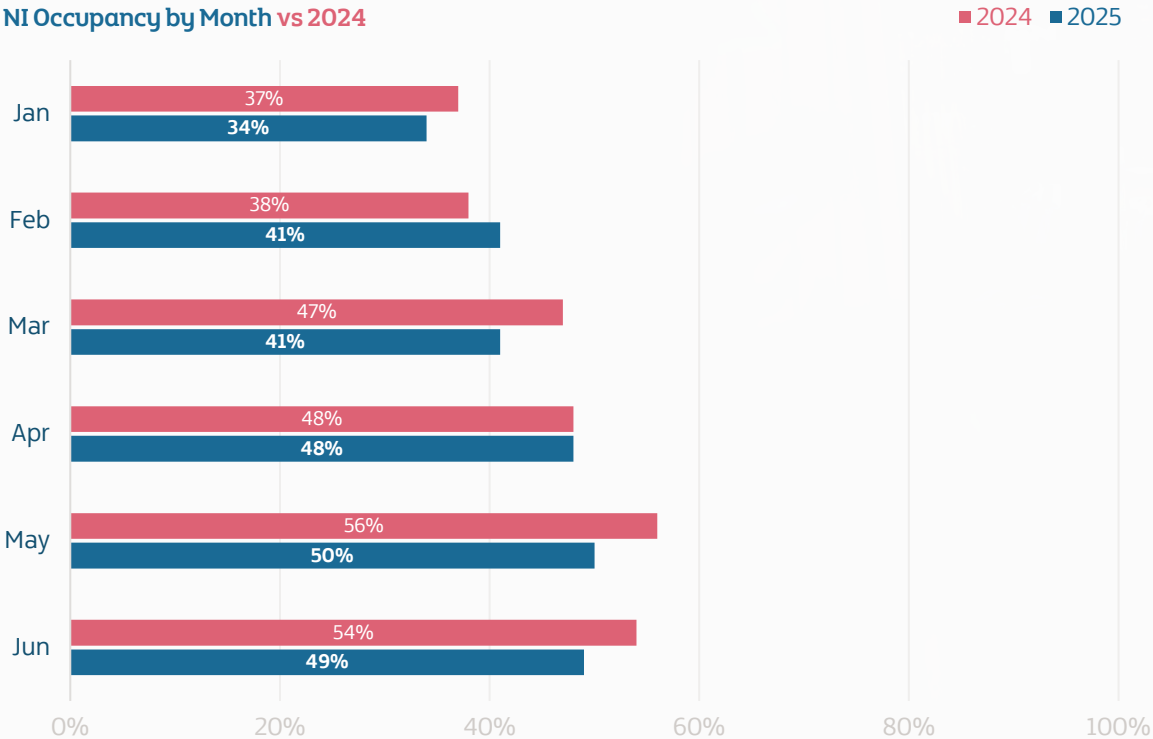




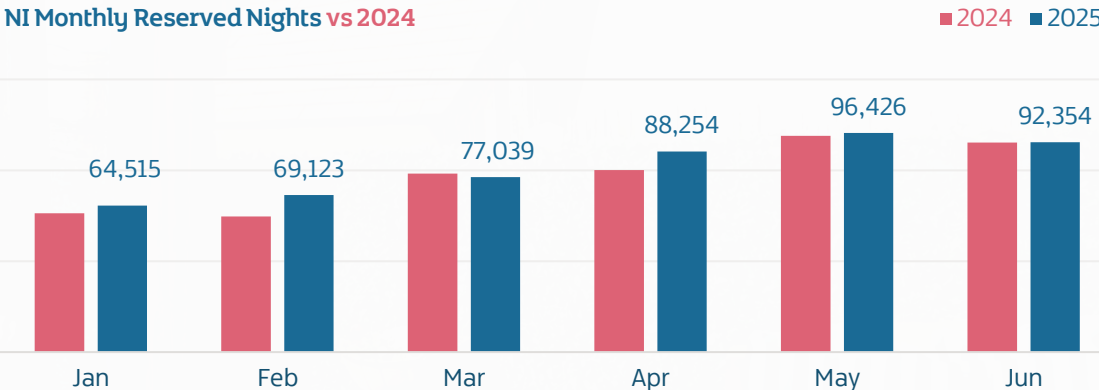
Lighthouse short-term rental accommodation statistics for June 2025 indicate that monthly occupancy in self-catering accommodation was 49%, representing a 1-percentage point decline compared to the previous month (May 2025). Monthly occupancy has fallen short of 2024 levels in all but one month so far this year, likely impacted by the growth in accommodation stock. Reserved nights in self-catering accommodation in June 2025 were on par with last year, however reserved nights have declined slightly compared to last month (May 2025). Monthly ADR continued to increase relative to 2024 in June (+11% - the largest monthly increase vs 2024 experienced so far this year).

### NI Monthly Self-Catering Performance

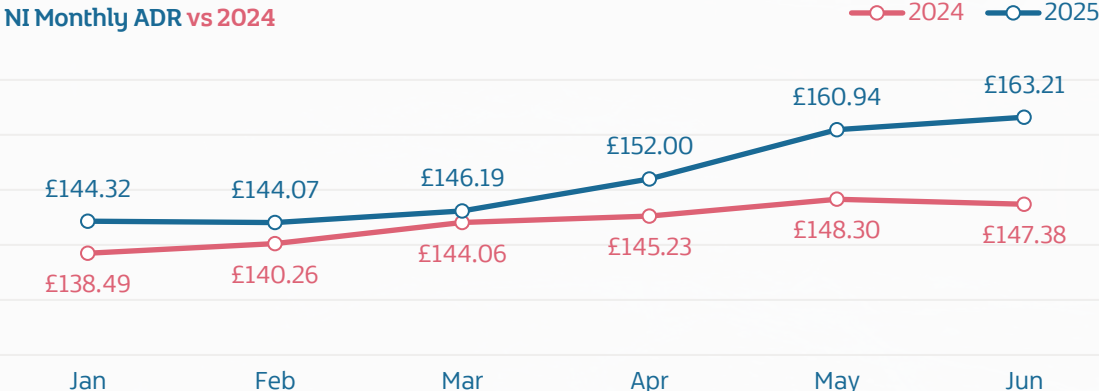
NI Occupancy by Month vs 2024



NI Monthly Reserved Nights vs 2024



NI Monthly ADR vs 2024



### Northern Ireland

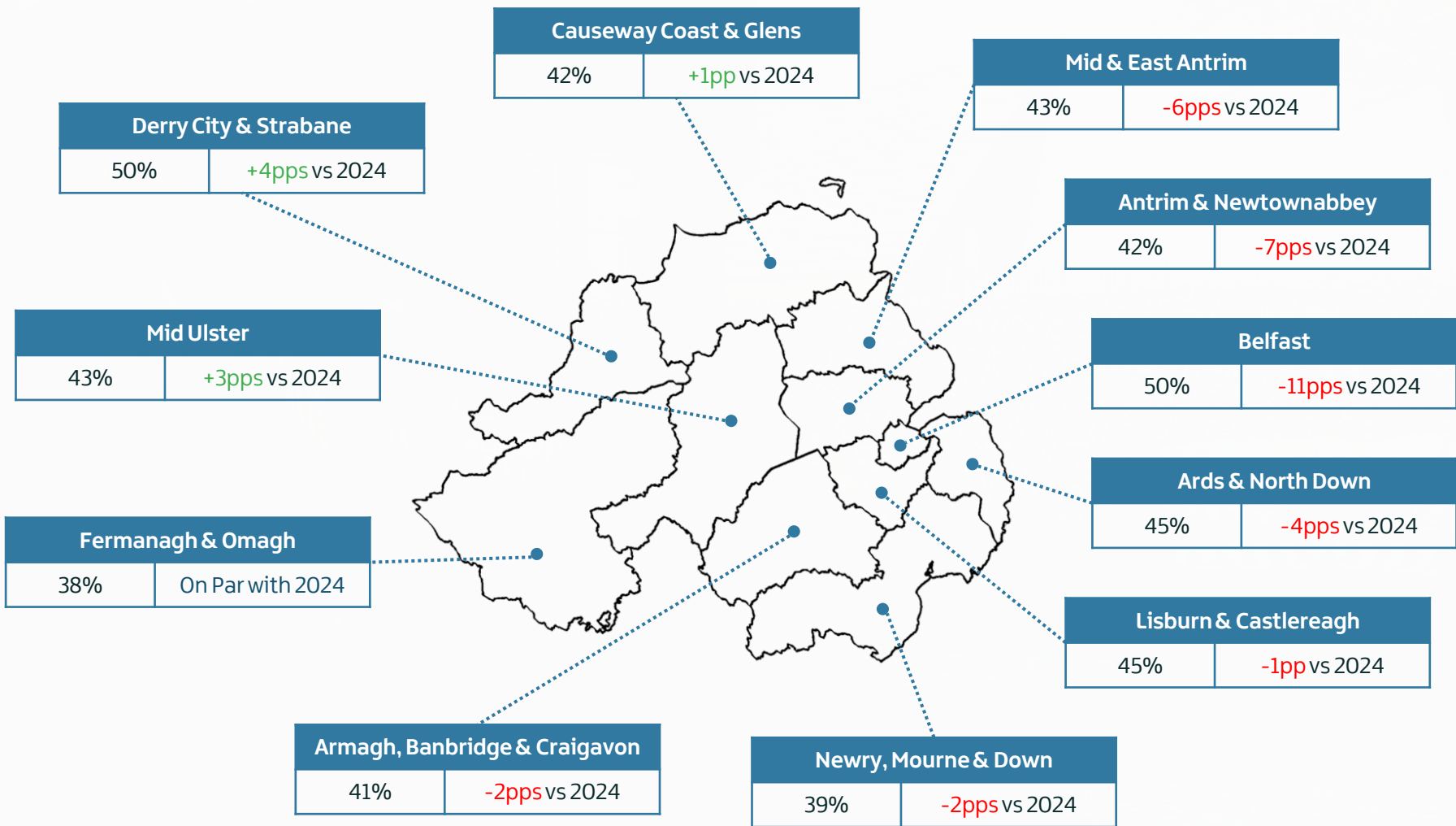
**44%**

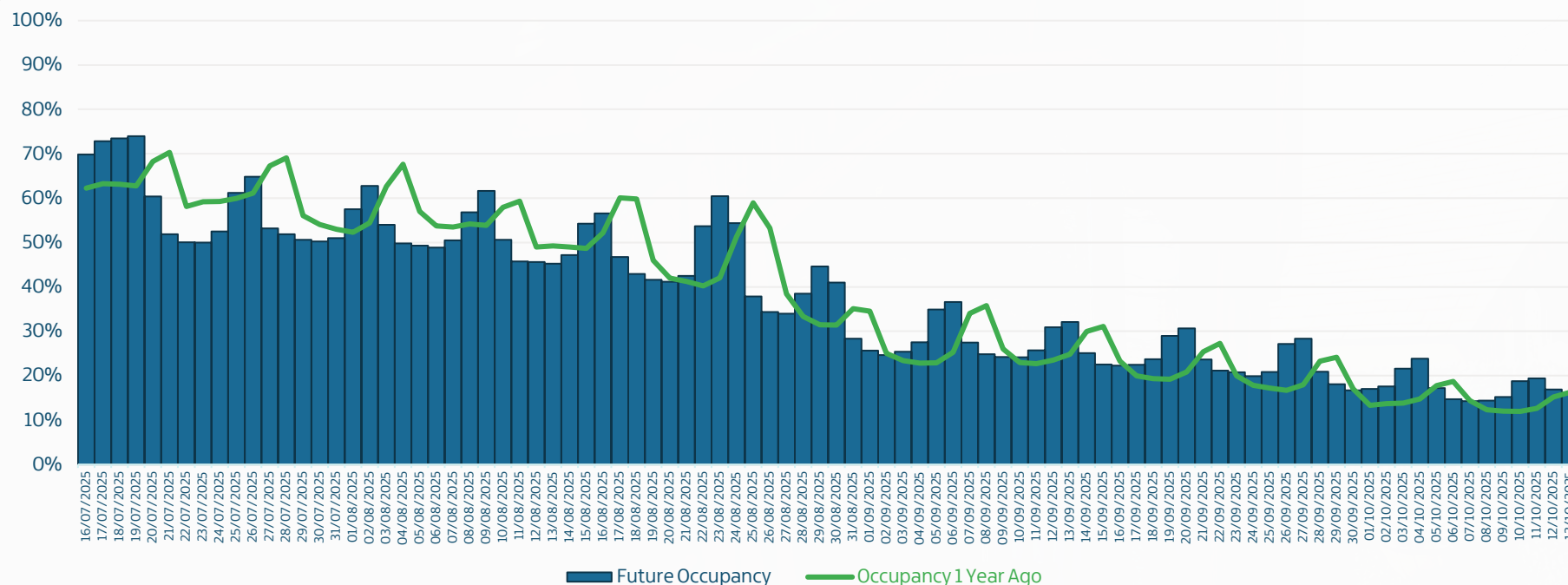
Jan-June 2025

**-3pps**

vs 2024

LGD	2024	2025
A&N	49%	42%
AND	49%	45%
ABC	43%	41%
BC	61%	50%
CCG	41%	42%
DC&S	46%	50%
F&O	38%	38%
L&C	46%	45%
MU	40%	43%
M&EA	49%	43%
NMD	41%	39%
NI	47%	44%





**Average Occupancy**  
(Next 3 months)

**38%**

No Change vs last year



**Reserved Nights**  
(Next 3 months)

**182,401**

▲ +6% 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 16/07/2025) reveals that daily occupancy on the books is exceeding the same period last year for 45/90 days in this outlook.
- Forward looking occupancy currently peaks at 74% on 19/07/25 when The 153<sup>rd</sup> Open Championship takes place at Royal Portrush Golf Club. Peak occupancy in this outlook is ahead of the peak occupancy seen over this period 2024 (70%).
- The occupancy trend is largely similar to last year, with small increases in occupancy at weekends. Pacing data is positive for the whole week in which The Open takes place. There are some spikes in occupancy in late summer, potentially linked to popular music festivals in Belfast, and the bank holiday at the end of 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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