



TOURISM
NORTHERN
IRELAND

Self-Catering

Performance Report

January-September 2025

Data Source:  lighthouse

Lighthouse short-term rental accommodation statistics for January-September 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 15%. Average length of stay for those booking self-catering accommodation is marginally shorter than the same period in 2024. Forward-looking occupancy data is looking positive for the next 90 days.

YTD Occupancy

48%

-4pps vs Jan-Sep 2024

YTD ADR

£170.58

+15% vs Jan-Sep 2024

YTD Reserved Nights

818,236

+4% vs Jan-Sep 2024

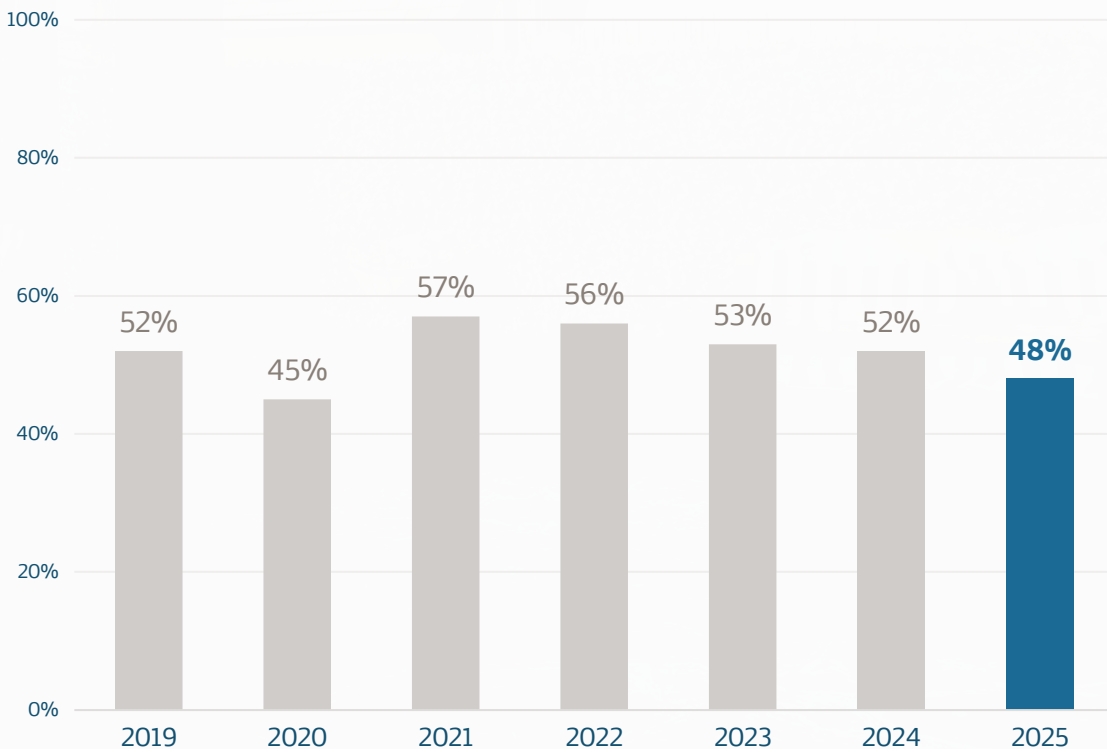
YTD Average Stay

3.6 nights

-0.2 nights vs Jan-Sep 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.

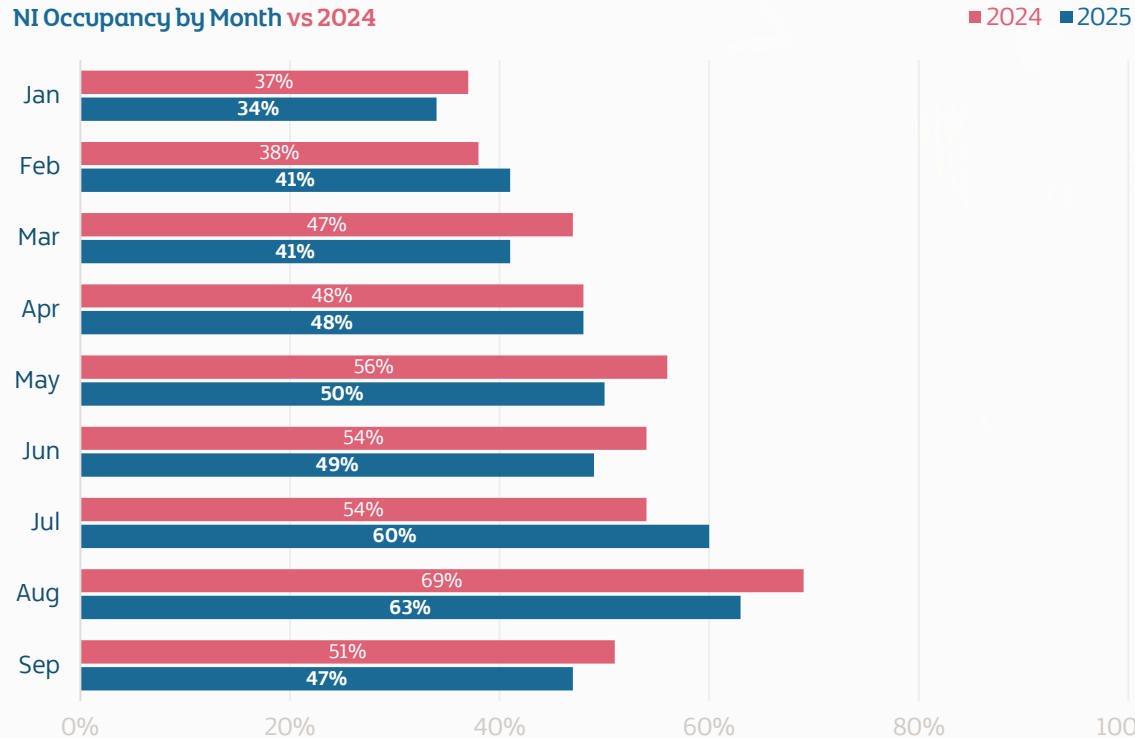
2025 Jan-Sep YTD Occupancy vs previous years



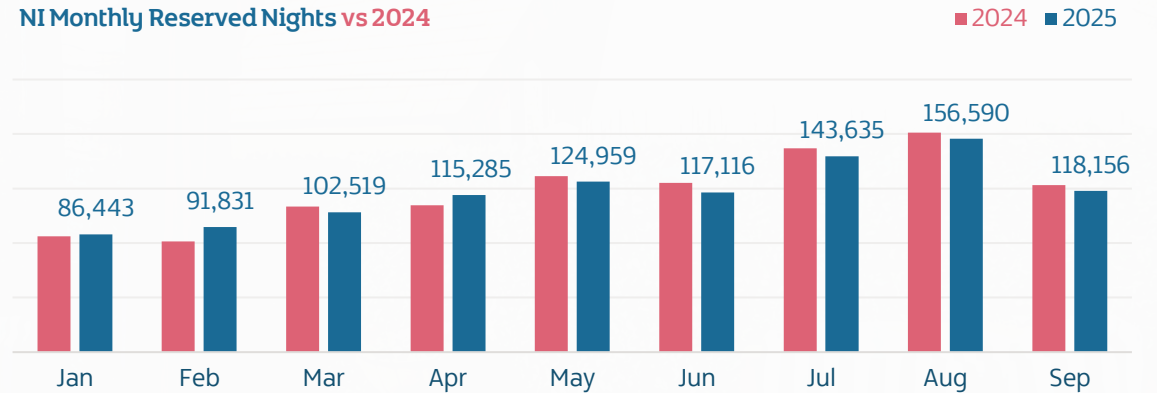
Lighthouse short-term rental accommodation statistics for September 2025 indicate that monthly occupancy in self-catering accommodation was 47%, representing a 16-percentage point decline compared to the previous month (August 2025). Monthly occupancy has fallen short of 2024 levels in all but one month so far this year, likely impacted by the growth in accommodation stock. Reserved nights in September 2025 were on par with last year, however reserved nights have declined compared to the previous month. Monthly ADR continued to increase relative to 2024 in September (+16%).

NI Monthly Self-Catering Performance

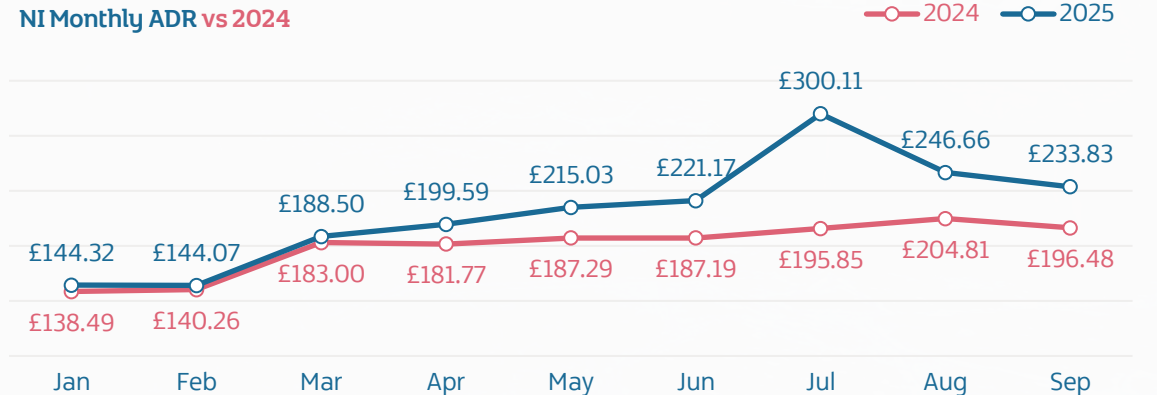
NI Occupancy by Month vs 2024



NI Monthly Reserved Nights vs 2024



NI Monthly ADR vs 2024



Northern Ireland

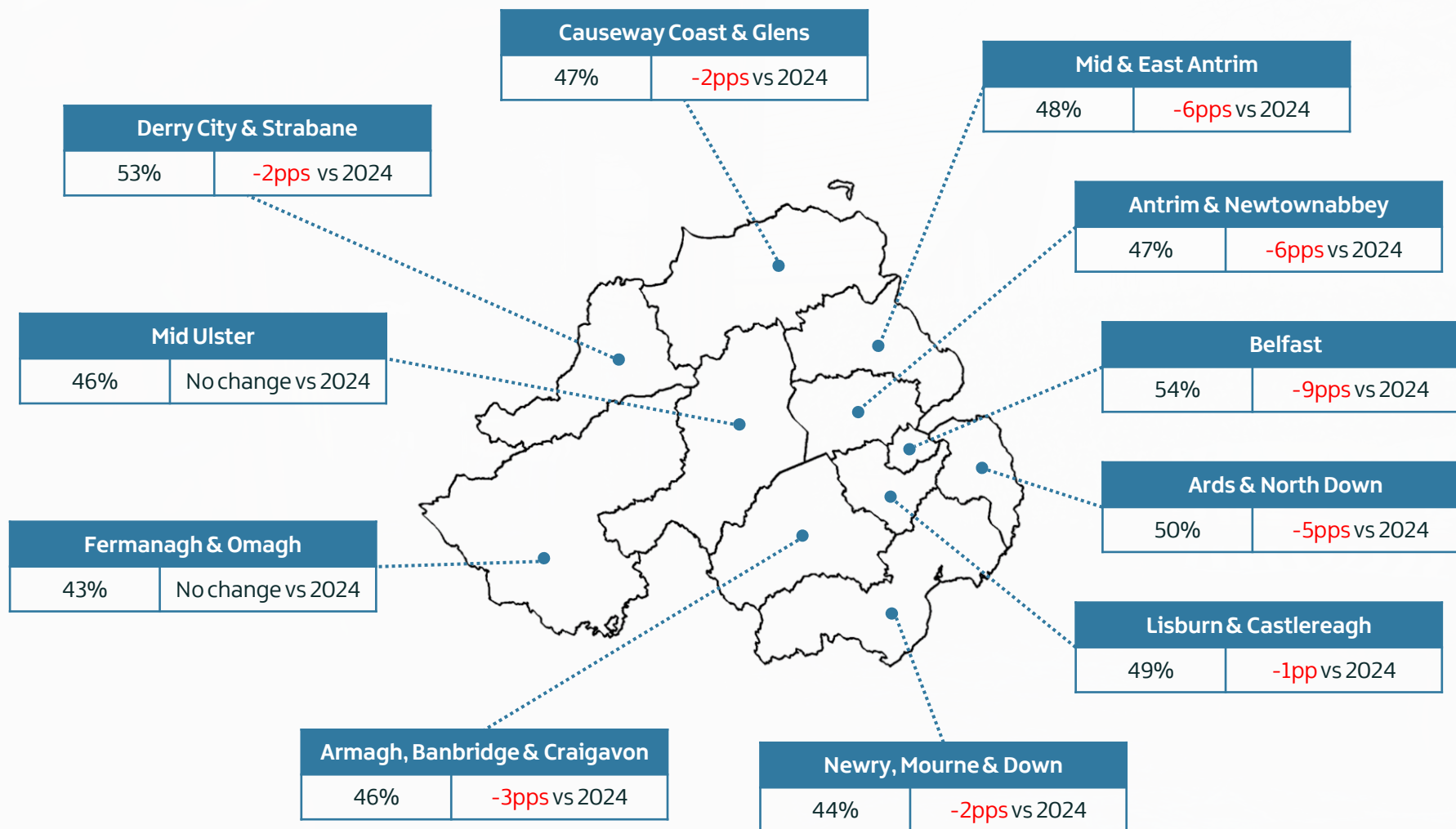
48%

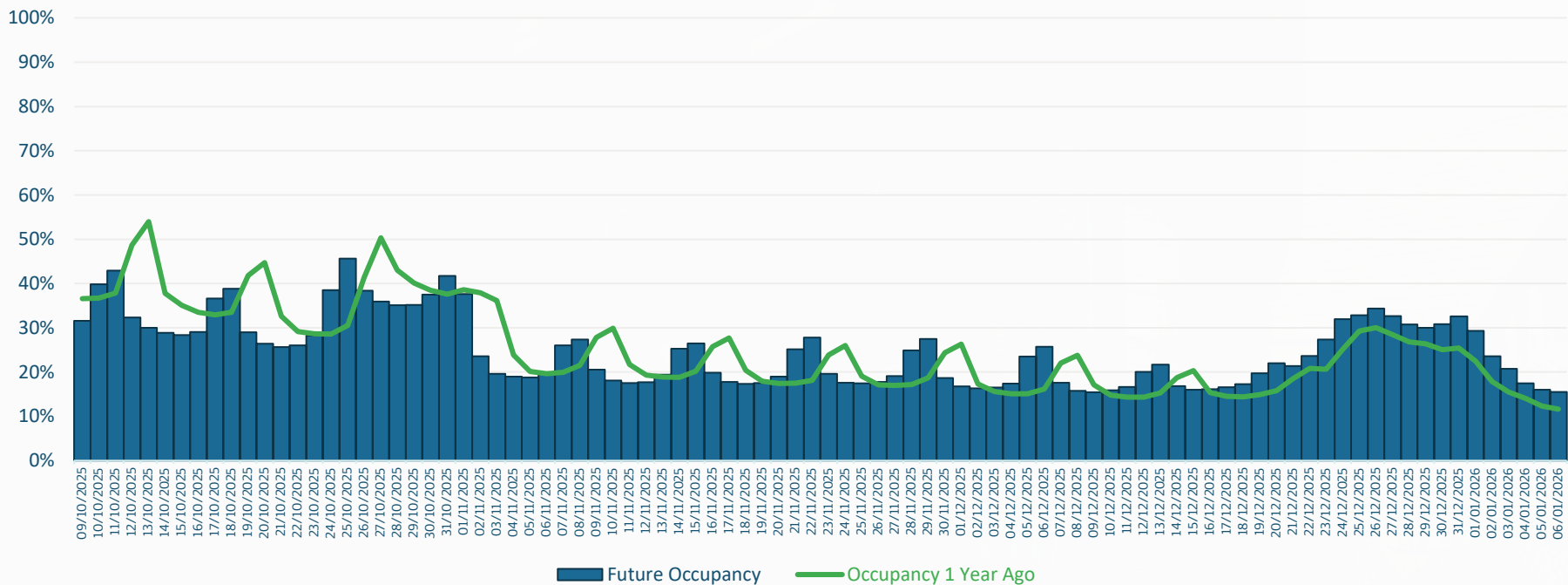
Jan–Sep 2025

-4pps

vs 2024

LGD	2024	2025
A&N	53%	47%
AND	55%	50%
ABC	49%	46%
BC	63%	54%
CCG	49%	47%
DC&S	51%	53%
F&O	43%	43%
L&C	50%	49%
MU	46%	46%
M&EA	54%	48%
NMD	46%	44%
NI	52%	48%





Average Occupancy
(Next 3 months)

25%

No Change vs last year



Reserved Nights
(Next 3 months)

139,299

▲ +3% 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 09/10/2025) reveals that daily occupancy on the books is exceeding the same period last year for 50/90 days in this outlook.
- Forward looking occupancy currently peaks at 46% on 25/10/25, possibly due to the mid term break for schools (Halloween). Peak occupancy in this outlook (46%) is below the peak occupancy seen over this period in 2024 (54%).
- The occupancy trend is largely similar to last year, with small increases in occupancy at weekends. Pacing data is positive for week around the Halloween break. Predictably there is a spike in occupancy for the Christmas and New Year period.

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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