



NORTHERN IRELAND SELF-CATERING OCCUPANCY SURVEY (JANUARY-DECEMBER 2011)

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This report provides the analysis of the most recent (January-December 2011) annual information on the performance of the self-catering industry in Northern Ireland. The figures show:

- The annual unit occupancy for 2011 was 27 percent, showing no change when compared with the 2010 level.
- The seasonal (April-September) unit occupancy for 2011 was 40%, a decrease of 1 percentage point when compared with the 2010 level.
- There were 24,080 weeks sold in self-catering units during 2011, an increase of 12% when compared with 2010.
- During 2011, annual occupancy for establishments with 5-9 units increased by 3 percentage points. Establishments with 5-9 units were the only size grouping to increase occupancy (+2 percentage points) in the seasonal months when compared to 2010.
- During 2011, five star establishments showed the biggest fall in occupancy compared to 2010, falling by 7 percentage points.
- The estimated number of seasonal weeks sold to out-of-state visitors in 2011 increased by 6% to 14,600.

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Executive Summary

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Introduction

This report provides an overview of the performance of the self-catering industry in Northern Ireland for the year of 2011. Full details of the research method employed and definitions used are presented in section 7.

Occupancy levels

In 2011, the annual unit occupancy level for self-catering units was 27%, showing no change when compared with the 2010 level. The seasonal unit occupancy level was 40%, a decrease of 1 percentage point when compared with the 2010 level.

In 2011, annual occupancy levels for establishments with 5-9 units increased by 3 percentage points. Seasonal occupancy levels fell in the smallest and largest establishments (those with over 10 units experiencing a 3 percentage points fall and those with less than 5 by 2 percentage points).

Five star units experienced the largest fall in occupancy of 7 percentage points all year and 11 percentage points in the peak season (April-September).

Weeks sold

There were 24,080 weeks sold in self-catering units during 2011, an increase of 12% when compared with 2010. There was also an increase of 12% of weeks sold during the seasonal period 2011 compared with 2010.

The number of both annual and seasonal weeks sold increased across all units regardless of size of the establishment.

All graded establishments experienced increases in weeks sold apart from five star establishments who experienced a decrease of 26% in annual and 28% in seasonal weeks sold since 2010.

Country of residence of guests

While the proportion of seasonal weeks sold to out-of-state visitors in 2011 was similar to 2010 (61% in both years), the estimated number of seasonal weeks sold to out-of-state visitors increased by 6% to 14,600.

Arrivals

It is estimated that there were 132,500 arrivals to self-catering establishments during 2011. This represents an increase of 23% when compared with 2010 arrivals. The majority (50%) of arrivals in 2011 were domestic (Northern Ireland) followed by Great Britain (28%).

Average Length of Stay

In 2011, the average length of stay in self-catering accommodation was 5.0 nights, representing a small fall from the 2010 average length of stay (5.4 nights).

Stock

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To offer tourist accommodation in Northern Ireland, you must have a certificate from the Northern Ireland Tourist Board (NITB). NITB refers to this as the certified stock. The Northern Ireland Tourist Board has responsibility to record all certified tourism accommodation in Northern Ireland. This chapter looks at the self-catering stock as recorded at December 2011.

Table 1 shows the characteristics of Northern Ireland's certified self-catering stock operating at December 2010 and December 2011. Between 2010 and 2011 the number of establishments increased by 10% and the number of units increased by 11%.

Table 1: Northern Ireland self-catering stock by classification, 2010-2011

	No. of trading establishments			No. of available units		
	2010	2011	Change 2010-2011 (%)	2010	2011	Change 2010-2011 (%)
Size						
1-4 units	1,180	1,292	9	1,375	1,499	9
5-9 units	33	43	30	218	278	28
10+ units	18	18	0	324	357	10
Grade						
Unclassified	215	258	20	373	461	24
One star	2	2	0	4	4	0
Two star	21	23	10	33	35	6
Three star	371	396	7	528	575	9
Four star	474	517	9	672	723	8
Five star	148	157	6	307	336	9
Total	1,231	1,353	10	1,917	2,134	11

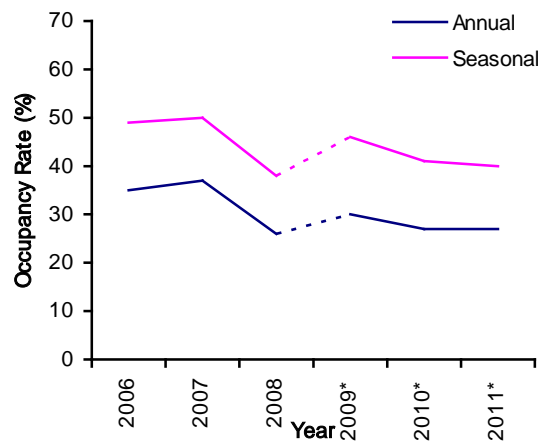
Source: Northern Ireland Tourist Board (stock as end November)

Occupancy levels and weeks sold

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The 2011 annual unit occupancy level for self-catering units was 27%, showing no change with the 2010 level. The 2011 seasonal unit occupancy level for self-catering units was 40%, a decrease of 1 percentage points when compared with the 2010 level. Figure 1 illustrates the annual and seasonal unit occupancy over the past five years.

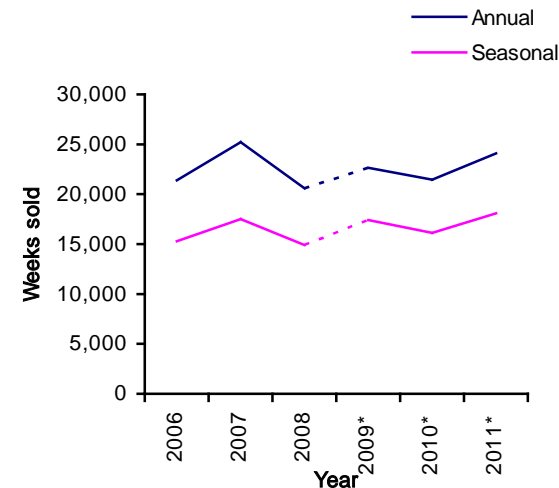
Figure 1: Unit occupancy (Annual and Seasonal) 2006-2011



*data weighted by local authority
Seasonal data=April-September

The number of weeks sold during 2011 increased when compared with 2010. The annual number of weeks sold rose by 12% to 24,080, and the seasonal number of weeks sold increased by 12% to 18,100. Figure 2 shows the weeks sold in self-catering establishments 2006-2011.

Figure 2: Weeks sold (Annual and Seasonal) 2006-2011



*data weighted by local authority
Seasonal data=April-September

Size of establishment

During 2011, annual occupancy rose by 3 percentage points and 2 percentage points respectively for 5-9 units and 10+ units. Seasonally, establishments with 5-9 units saw an increase in 2 percentage points in comparison to 2010, all other sized units saw decreases. Table 2 shows the annual and seasonal occupancy rates for Northern Ireland in 2010 and 2011.

Table 2: Occupancy by size of establishment 2010-2011

Size of establishment (no. of units)	Annual occupancy (%)			Seasonal occupancy (%)		
	2010	2011	Change (pps)	2010	2011	Change (pps)
1-4	27	26	-1	40	38	-2
5-9	28	32	3	41	43	2
10+	34	36	2	51	48	-3
All	27	27	0	41	40	-1

pps=percentage points
change based on unrounded data
Seasonal data=April-September

During 2011, annual and seasonal weeks sold increased for all sized establishments. Table 3 shows the annual and seasonal weeks sold by size of establishment in 2010-2011.

Table 3: Weeks sold by size of establishment 2010-2011

Size of establishment (no. of units)	Annual weeks sold (00s)			Seasonal weeks sold (00s)		
	2010	2011	Change (%)	2010	2011	Change (%)
1-4	182	187	3	137	143	5
5-9	13	26	106	9	19	106
10+	20	28	41	15	18	25
All	215	241	12	161	181	12

change based on unrounded data
Seasonal data=April-September

Establishment Grade

During 2011, five star establishments experienced a decrease in both annual and seasonal occupancy of 7 percentage points and 11 percentage points respectively. Two star establishments experienced a 1 percentage point increase in annual occupancy, but a 3 percentage points decrease in seasonal occupancy.

The sample size for one star establishments in 2010 and 2011 were too small to provide a reliable estimate.

Table 4 shows the annual and seasonal occupancy levels by grade.

Table 4: Occupancy by establishment grade 2010-2011

* sample size too small to provide a reliable estimate

Establishment Grade	Annual occupancy (%)			Seasonal occupancy (%)		
	2010	2011	Change (pps)	2010	2011	Change (pps)
One star	*	*	*	*	*	*
Two star	20	20	1	33	31	-3
Three star	26	25	-1	38	36	-2
Four star	29	30	1	45	45	0
Five star	33	26	-7	47	36	-11
All (including unclassified and one star)	27	27	0	41	40	-1

change based on unrounded data
Seasonal data=April-September

Five star establishments were the only grade to experience a decrease in the weeks sold during 2011 compared with 2010 (-26% in annual weeks sold and -28% in seasonal weeks). In comparison, two star

establishments experienced the largest increases (14% on annual weeks sold and 12% on seasonal weeks sold). Table 5 illustrates the annual and seasonal weeks sold by grade in 2010 and 2011.

Table 5: Weeks sold by establishment grade 2010-2011

Establishment Grade	Annual Weeks sold (00s)			Seasonal Weeks sold (00s)		
	2010	2011	Change (%)	2010	2011	Change (%)
One star	*	*	*	*	*	*
Two star	6	7	14	5	6	12
Three star	72	78	9	53	58	10
Four star	91	101	12	71	78	10
Five star	39	29	-26	28	20	-28
All (including unclassified and one star)	215	241	12	161	181	12

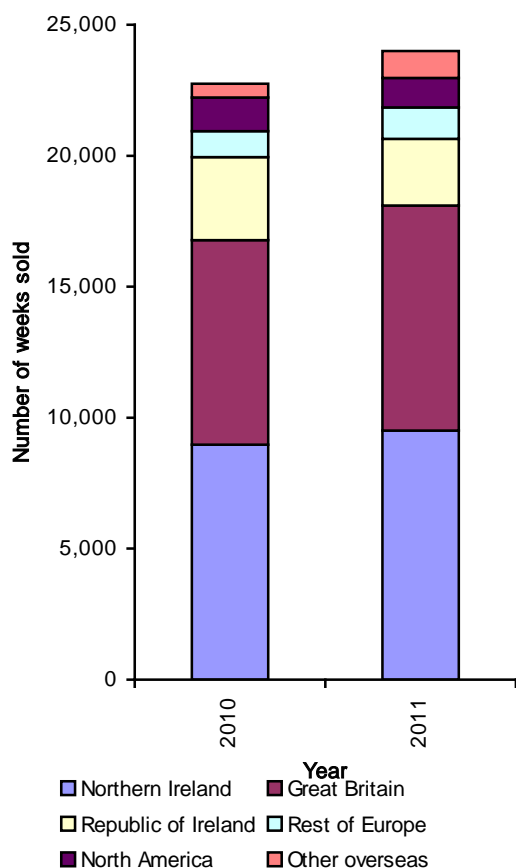
* sample size too small to provide a reliable estimate
change based on unrounded data
Seasonal data=April-September

Country of Residence of Guests

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In 2011, 61% of all weeks sold were to non-Northern Ireland visitors, showing no change since 2010. In real terms, the actual number of weeks sold to out-of-state visitors in 2011 was 14,600, an increase of 6% from the number sold in 2010 (13,800). Figure 3 shows the weeks sold in 2010 and 2011 broken down by the country of residence of the guests.

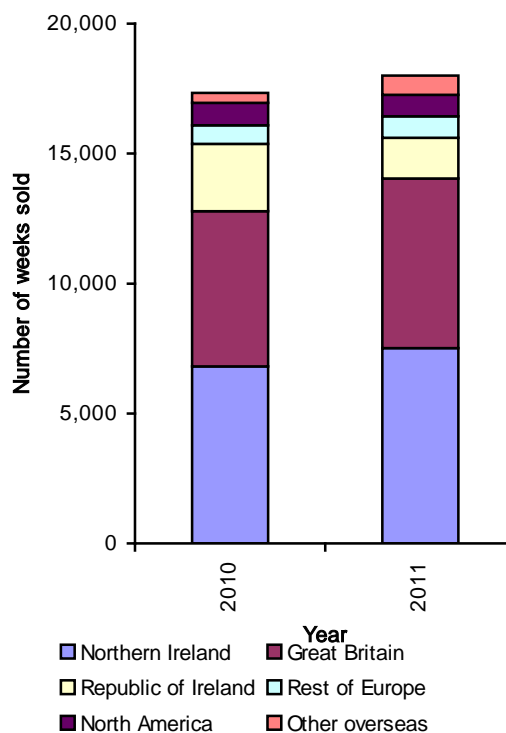
Figure 3: Total Weeks sold by Country of Residence of Guests 2010-2011



In 2011, Republic of Ireland guests made up 11% of total annual bookings, compared with 14% in 2010. In 2011, the proportion of guests from Great Britain increased by 2 percentage points to 36%.

Figure 4 illustrates the seasonal weeks sold in 2010 and 2011 broken down by the country of residence of the guests. The total number of seasonal weeks sold to out-of-state visitors was 10,600, showing no change when compared with 2010. The Republic of Ireland guests make up 9% of this total, a decrease of 5 percentage points when compared with 2010.

Figure 4: Seasonal weeks sold by Country of Residence of Guests 2010-2011



Arrivals by Country of Residence

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An arrival does not take into consideration the length of stay, therefore a party of 5 staying two weeks is treated as 5 arrivals, as would a party of 5 staying one week.

It is estimated that there were 132,500 arrivals to self-catering establishments during 2011. This represents an increase of 23% when compared with the 2010 arrival numbers. There was very little change between the breakdown of arrivals in 2010 and 2011. The majority of arrivals in 2011 (50%) were domestic (Northern Ireland) followed by Great Britain (28%). Figure 5 illustrates the breakdown of arrivals by country of residence for 2011.

Figure 5: All arrivals by Country of Residence 2010-2011

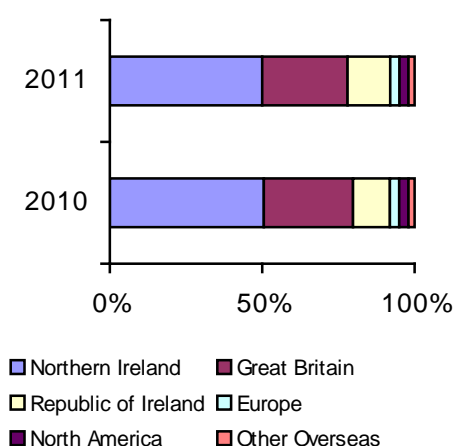


Figure 6: Peak season arrivals by Country of Residence 2010-2011



Figure 6 shows the seasonal arrivals broken down by country of residence. Northern Ireland accounted for 50% of the total arrivals in 2011, an increase of 1 percentage point when compared with 2010. The Republic of Ireland seasonal arrivals decreased by 1 percentage point to 13% in 2011.

Average Length of Stay

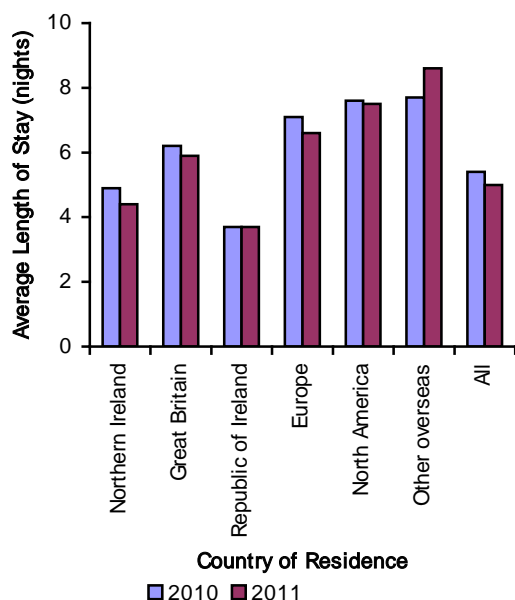
6

In 2011, the average length of stay in self-catering accommodation was 5.0 nights, representing a fall from the 2010 average length of stay (5.4 nights).

Northern Ireland visitors decreased their stay by 0.5 to 4.4 nights in 2011 compared with 2010. Other overseas were the only country to increase their length of stay (7.7 in 2010 to 8.6 in 2011).

Figure 6 shows the average length of stay by country of residency for 2010 and 2011.

Figure 6: Average Length of Stay by Country of Residence, 2010-2011



Methodology

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To offer tourist accommodation in Northern Ireland, you must have a certificate from the Northern Ireland Tourist Board (NITB) – NITB refers to this as certification. It is illegal to offer tourist accommodation in NI without a certificate from NITB. The list of certified accommodation in NITB is known as the ‘stock’ (section 2).

The 2011 self-catering survey was conducted by means of a postal questionnaire covering the period of January – December of that year. All owners of self-catering establishments were asked to provide the length of stay, number of arrivals and country of residence for each arrival for each booking throughout the year. Owners were also asked to provide an estimated income for the year.

In 2011, there were a total of 1,353 establishments in the self-catering stock. Of these, 369 returned a completed form resulting in a 27% response rate.

Data was analysed by size of establishments, season and visitor’s country of origin.

All of the analysis was carried out using a weighting procedure which takes into account non respondents. The weights were calculated by local authority and number of units. Statistics presented in this report pre-2009 are NITB statistics.

The following definitions are employed throughout the report;

“establishment” refers to the total property of self-catering chalets/houses/flats

“units” refer to the actual number of chalets/houses/flats within an establishment

“seasonal” refers to the period “April-September”

“out-of-state visitors” refers to visitors not from Northern Ireland

Further Information



For further information, please contact:

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<http://www.detini.gov.uk/deti-stats-index/tourism-statistics/stats-self-catering.htm>

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