

Northern Ireland Self Catering Occupancy Statistics (January – December 2014)

Published 28 May 2015

This report provides information on occupancy in self catering accommodation in Northern Ireland in 2014. Key findings are:

- self catering unit occupancy in 2014 was 33%, an increase of 1 percentage point from 2013;
- seasonal (April-September) unit occupancy was 45% in 2014, an increase of 2 percentage points on the previous year;
- of the 31,600 weeks sold in self catering units, 70% (22,000) were during peak season (April-September);
- around two out of three weeks sold in self catering establishments were to visitors from outside Northern Ireland; and
- the average length of stay has decreased from 4.8 nights in 2013 to 4.6 nights in 2014.

Lead Statistician:

Patricia Wyers
Tourism Statistics Branch,
Netherleigh, Massey Avenue,
BELFAST
BT4 2JP

Telephone: 028 9052 9585

Email: tourismstatistics@dfpni.gov.uk

Frequency: Annual
Coverage: Northern Ireland
Theme: People and Places

Contents:

Summary	2
Self catering stock	3
Occupancy rates and weeks sold	4
Guests country of residence	5
Arrivals country of residence	6
Average length of stay	7
Methodology	8

Summary

The occupancy rate for self catering accommodation in Northern Ireland (NI) was 33%, a rise of 1 percentage point on the 2013 rate. The occupancy rate for peak season (April to September) rose by 2 percentage points to 45%. This is set against a fall in the number of self catering establishment available. The occupancy rates have shown a steady rise over the last number of years but have not recovered from the peak occupancy rates of 2007.

The number of weeks sold in 2014 was 31,600, 70% of which were in the peak season. This is an increase of 8% annually and of 9% in peak season. Over 1/3 of all weeks sold were to NI residents, with 32% and 14% sold to Great Britain (GB) and Republic of Ireland (RoI) residents respectively. Rises were seen in weeks sold to NI, RoI, the rest of European and North American residents. While the number of weeks sold to GB residents remained the same, sales to the 'other (overseas)' market fell between 2013 and 2014. Although accounting for only 6% of annual sales, the annual number of weeks sold to North American residents rose by 76%.

The number of arrivals to self catering establishments rose by 18% to 181,300. Peak season arrivals, which accounted for two-thirds of all arrivals, also rose by 18%. Arrivals information displayed similar patterns to guest figures in that 39% were from NI, 32% were from GB and 17% were from RoI. Rises in arrivals were, however, seen in all markets and ranged from 1% in the 'other' market to 89% in the North American market.

The annual average length of stay has fallen from 4.8 nights in 2013 to 4.6 nights in 2014, with peak season rate also falling (from 5.2 to 5.0 nights). Although a rise in the length of stay was seen in those from NI and RoI, all other markets showed decreases on the previous year. Despite this, those who travelled further tended to stay longer.

Overall, while the number of guests choosing to stay in self catering accommodation in NI has risen in 2014, the average length of stay has decreased. The overall impact of these measures taken together has resulted on the overall occupancy rates showing smaller rises than those experienced in number of weeks sold and the number of arrivals to self catering accommodation in 2014.

It is worth noting that the availability of establishments for rental purposes can fluctuate throughout each year. This can be due to temporary closures, for example, to accommodate redecorating. For this reason, occupancy rates and weeks sold are not directly comparable as the number of available rental weeks can vary each year.

Self catering stock (Source: Tourism NI)

You must have a certificate from Tourism NI (TNI) to offer tourist accommodation in NI – this is referred to as certification. It is illegal to offer tourist accommodation in NI without a certificate from TNI. The list of certified accommodation in TNI is known as the 'stock'. See Table 1 below for more information on Northern Ireland's certified self catering stock operating at the start of December 2014.

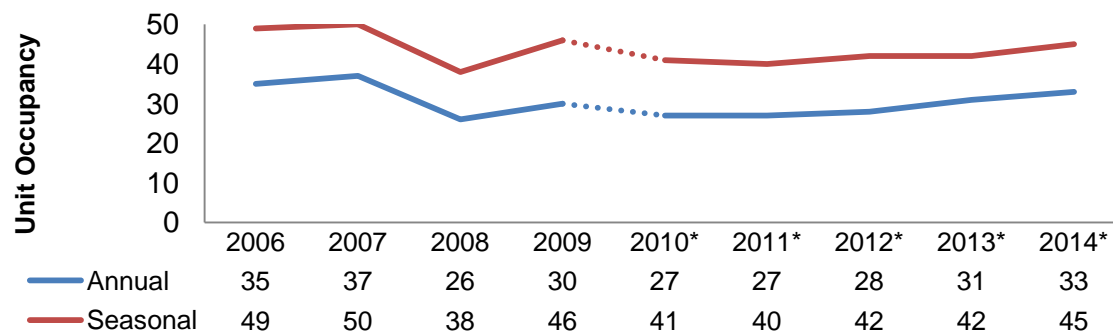
Table 1: Northern Ireland Self Catering Accommodation Stock 2014

Size / Classification of Establishment	Establishments	Units
1 to 4 Units	1,352	1,604
5 to 9 Units	36	233
10 + Units	23	445
Total	1,411	2,282
Unclassified	1,014	1,636
One Star	0	0
Two Star	7	13
Three Star	150	256
Four Star	180	303
Five Star	60	74
Total	1,411	2,282

Source: Tourism NI

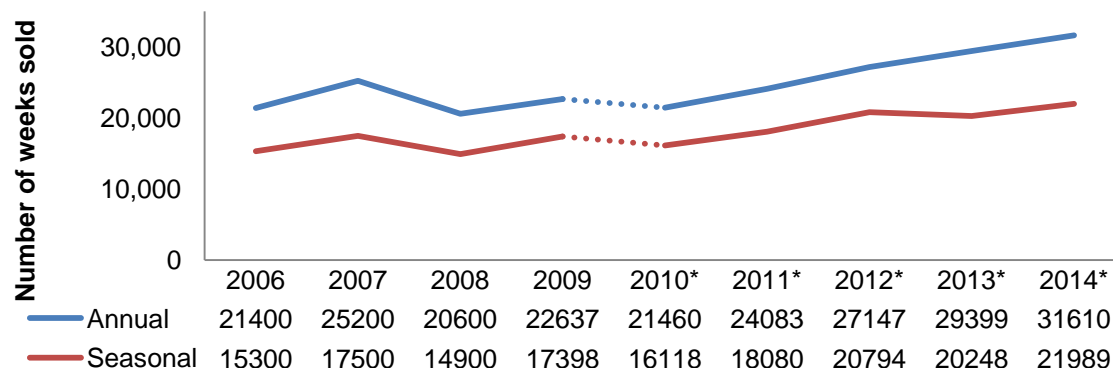
Occupancy levels and weeks sold

Figure 1: Unit Occupancy (Annual and Peak Season) 2006-2014



The overall 2014 self catering unit occupancy level increased by 1 percentage point to 33%. While there has been a steady rise over recent years, occupancy rates have not yet recovered to the level experienced in 2007. At 45% (a rise of 2 percentage points), the peak season (April to September) occupancy rate reflects the same steady rise over time as the annual rate.

Figure 2: Weeks sold (Annual and Peak Season) 2006-2014

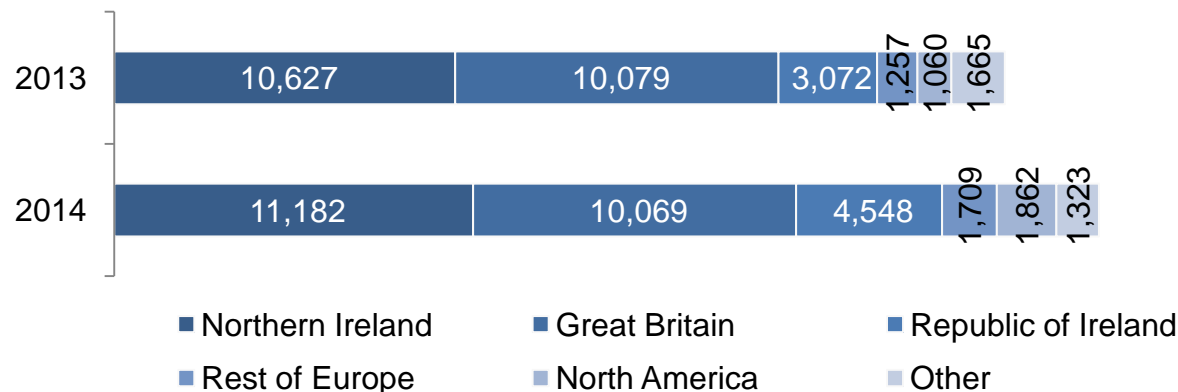


The number of weeks sold during 2014 increased by 8% (to 31,610) when compared with 2013. The number of peak season weeks also increased by a similar amount (9%) to 21,989. The proportion of weeks spent in self catering units over peak season was 70%, showing that this period remains the more popular time to take these trips.

*data weighted by local authority Peak season=April-September

Country of Residence of Guests

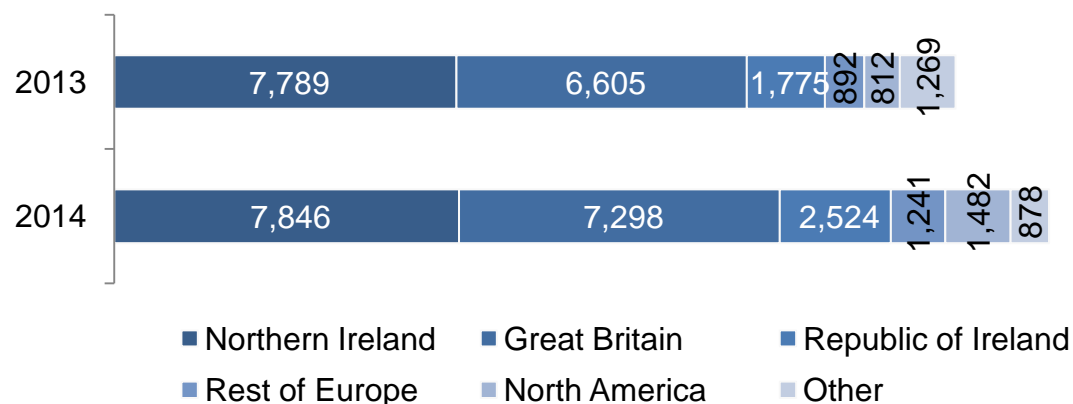
Figure 3: Total weeks sold by Country of Residence of guests 2013-2014



In 2014, 35% of all weeks sold were to NI residents, a similar proportion to the 2013 figure (36%). The sale of 20,428 weeks to non-residents represents a rise of 9% (from 18,772 weeks) in the previous year.

Guests from Great Britain made up 31% of total annual bookings in self catering establishments in 2014, with Republic of Ireland residents representing the next largest proportion of guests (13% of bookings in 2014).

Figure 4: Seasonal weeks sold by Country of Residence of guests 2013-2014

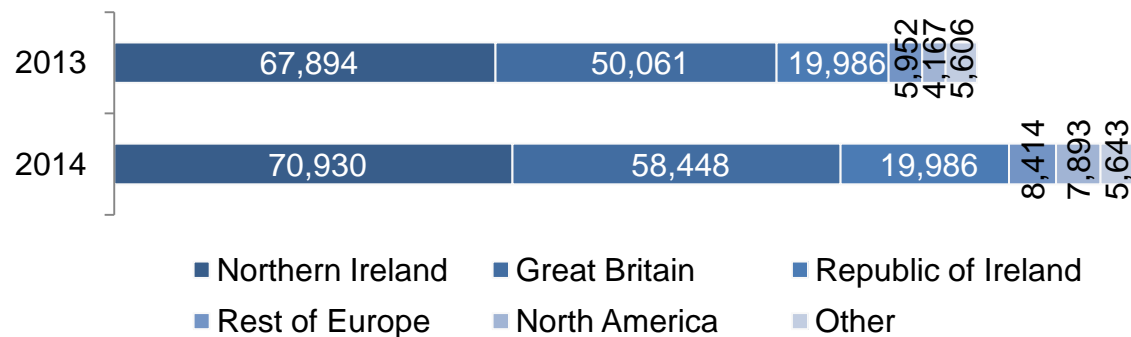


The total number of seasonal weeks sold to non residents was 14,144 (64% of all seasonal weeks sold in 2014) – a rise of 14% on the previous year. Visitors from Great Britain make up a third of seasonal weeks sold in 2014 (33%) with visitors from the Republic of Ireland making up 11% (2,524).

Arrivals by Country of Residence

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

Figure 5: All arrivals by Country of Residence 2013-2014



It is estimated that there were 181,296 arrivals to self catering establishments during 2014 - an increase of 18%. Thirty-nine percent (39%) of arrivals in 2014 were from NI (70,930), with a further third (32%) from Great Britain (58,448). There is little change in the proportions of arrivals by country of residence, with Northern Ireland, Great Britain and Republic of Ireland remaining the three top countries of residence for arrivals.

Figure 6: All arrivals during peak season by Country of Residence 2013-2014

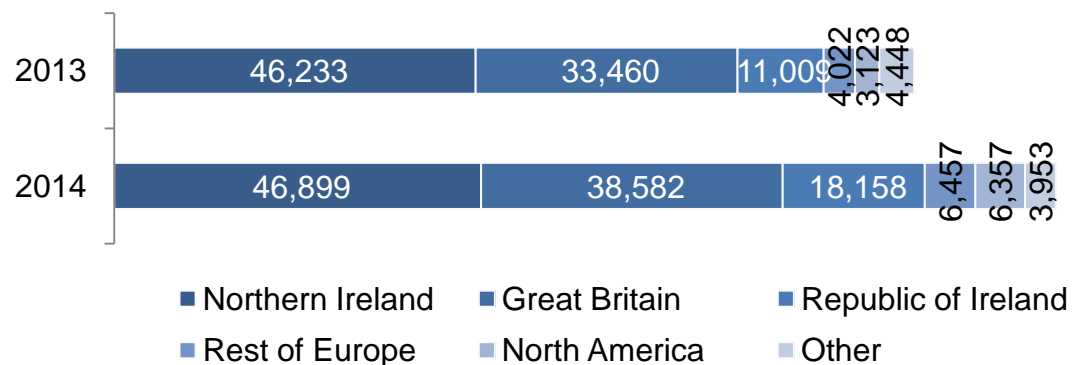
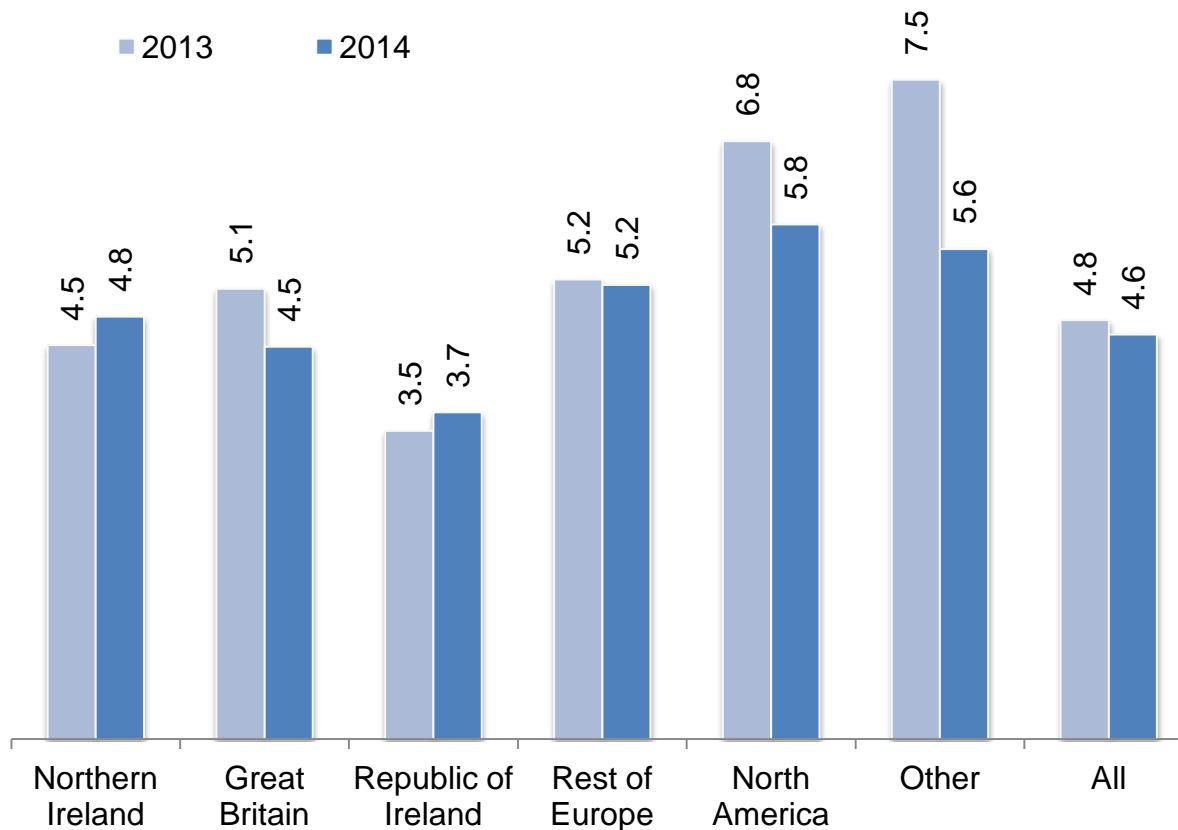


Figure 6 depicts seasonal arrivals broken by country of residence. Northern Ireland accounted for 39% of the seasonal arrivals in 2014, Great Britain accounted for 32% and the Republic of Ireland 15%. Although representing only 5% of all peak season arrivals, arrivals from North America doubled.

Average Length of Stay

Figure 7: Average Length of Stay by Country of Residence



In 2014 the average length of stay in self catering accommodation was 4.6 nights. This was a decrease of 3% when compared to 4.8 nights in 2013.

Those from Northern Ireland and the Republic of Ireland stayed in self catering accommodation slightly longer than in the previous year. All other markets showed shorter length of stays than in 2013.

Those from further away had longer lengths of stay with visitors from North America staying an average of 5.8 nights annually, while visitors from 'other' locations and the 'rest of Europe' staying an average of 5.6 nights and 5.2 nights respectively.

Occupancy Survey - Methodology

Sample

To offer tourist accommodation in NI, you must have a certificate from Tourism NI (TNI) - TNI refers to this as certification. It is illegal to offer tourist accommodation in NI without a certificate from TNI. The list of certified accommodation in TNI is known as the 'stock'. Table 1 in the report showed the stock when the self catering survey was issued.

The 2014 self catering survey was conducted by means of a postal questionnaire covering the period January-December of that year. The questionnaire was issued in December, it was also emailed to any establishments that had an email address and an option for returning it through the same method. All owners (a full census) 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, however response to this was relatively low and due to different interpretations of the question unreliable.

In 2014, there were a total of 1,411 establishments in the self catering stock (table 1). Of these, 304 returned completed forms. Additionally, 88 were closed (temporary closure) or shut (cessation of trading) and a further 220 either refused or could not complete the form. The resultant response rate is 28%. Data was analysed by season and visitor's country of origin.

Weighting

All the analysis was carried out on weighted data. The data was weighted for non-response assuming no non-response bias and also weighted by local authority and number of units.

Terminology

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” which in tourism is deemed to be peak season

Data Revisions

The information here-in may be subject to revision due to improvements to the survey/analysis methodology or the inclusion of data returned after the publication date. The figures presented in this bulletin are the most up-to-date available at the time of publication. Full information on the revision of tourism statistics can be found at [Tourism Statistics Branch Revisions Policy](#)