

NORTHERN IRELAND SELF-CATERING OCCUPANCY SURVEY (JANUARY-DECEMBER 2013)

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This report provides the analysis of the most recent (January-December 2013) annual information from the Self-catering occupancy survey in Northern Ireland. The figures show:

- The annual self-catering unit occupancy for 2013 was 31%, showing an increase of 4 percentage points since 2012.
- The seasonal (April-September) unit occupancy for 2013 was 42%, showing an increase of 1 percentage point on the same period a year ago.
- There were 29,399 weeks sold in self-catering units during 2013, 69% of these were during peak season (20,248 weeks in April-September 2013).
- During 2013, annual occupancy for establishments with 10 or more units increased by 19 percentage points to 53%. Annual self-catering occupancy for all establishments, regardless of how many units they owned increased.
- During 2013, four and five star units experienced the highest annual self-catering occupancy rates (34%).

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Executive Summary

Occupancy Rates

In 2013, the annual unit occupancy for self-catering establishments was 31%, showing an increase of 4 percentage points from the same period in 2012. The seasonal unit occupancy (peak season=April to September) was 42%, showing a slight increase of 1 percentage point compared with the 2012 level.

When looking at the number of units available, the annual occupancy levels for all categories increased. These increases ranged from +3 percentage points (to 27%) for those with less than five units to +19 percentage points (to 53%) for those with more than ten units

Four and five star units experienced the highest annual occupancy rates (34%). However, during the peak season, four star units fare slightly better (48%) than five star (46%).

Information on annual tourism statistics during 2013 can be found in the [Northern Ireland Annual Tourism Statistics 2013 Publication](#).

Weeks Sold

An estimated 29,399 weeks were sold in self-catering units during 2013, an increase of 8% when compared with 2012. Sixty-nine percent of these weeks were sold during peak season (20,248). Although there were more weeks sold over the whole year, the number of weeks sold during peak season showed a decrease of 3% when compared to the same period in 2012.

Country of residence of guests

The numbers of weeks sold to Northern Ireland residents in self-catering establishments in 2013 fell by 17% when compared to the previous year. There was also a decrease in weeks sold to North Americans (-9%) over this period.

Arrivals

It is estimated that there were 153,666 arrivals to self-catering establishments throughout 2013. This represented a decrease of 9% when compared with 2012 arrivals. The majority of arrivals to self-catering units during 2013 (44%) were domestic (Northern Ireland) followed by Great Britain (33%).

Average Length of Stay

In 2013, the average length of stay in self-catering accommodation was 4.8 nights (a decrease of 14% from 5.5 in 2012). Those from the Republic of Ireland and Northern Ireland stayed in self-catering for the shortest length of time (3.5 and 4.5 respectively). Apart from those from GB who stayed 5.1 nights in both 2012 and 2013, the average length of stay for visitors from all other markets decreased between 2012 and 2013.

Stock (Source: Northern Ireland Tourist Board)

To offer tourist accommodation in NI, 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'.

Table 1 shows the characteristics of Northern Ireland's certified self-catering stock operating at the start of December 2011-2013.

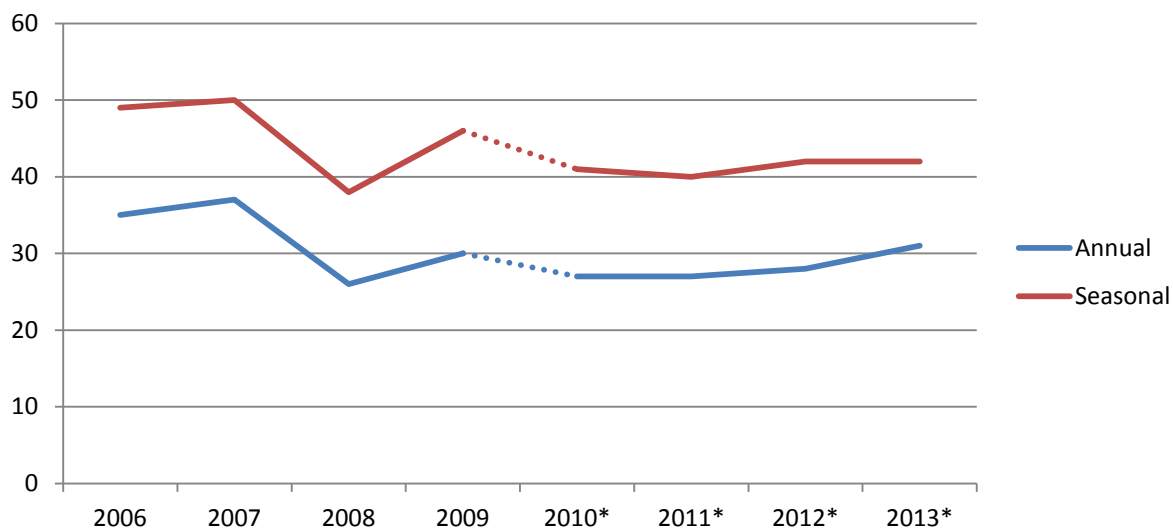
Table 1: Northern Ireland Stock, 2011 to 2013

	2011		2012		2013	
	Establishments	Units	Establishments	Units	Establishments	Units
1-4 units	1,292	1,499	1,372	1,641	1,379	1,641
5-9 units	43	278	37	235	35	229
10+ units	18	357	20	384	22	425
Unclassified	258	461	940	1,401	955	1,476
One star	2	4	0	0	2	2
Two star	23	35	4	5	9	14
Three star	396	575	143	242	152	255
Four star	517	723	250	419	239	417
Five star	157	336	92	193	79	131
Total	1,353	2,134	1,429	2,260	1,436	2,295

Occupancy levels and weeks sold

The 2013 annual unit occupancy level for self-catering units was 31%, an increase of 4 percentage points compared to 2012 (28%). This also showed an increase since 2011 (27%). The peak season occupancy has shown little change over the last three years (40% in 2011, 42% in 2012 and 2013).

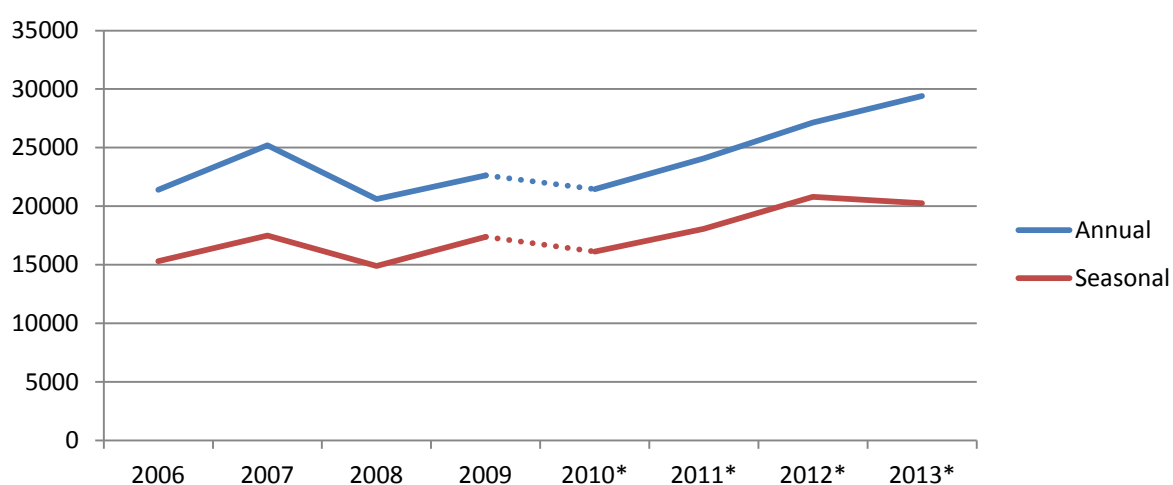
Figure 1: Unit Occupancy (Annual and Peak Season) 2006-2013



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

The number of weeks sold during 2013 increased by 8% (to 29,399) when compared with 2012. However, the number of peak season weeks decreased by 3% to 20,248 over the same period. Despite this fall, the proportion of weeks spent in self-catering units over peak season was 69% showing it remained the more popular time to take these trips.

Figure 2: Weeks sold (Annual and Peak Season) 2006-2013



Size of establishment

Table 2 shows that during 2013 annual occupancy rose by 4 percentage points. When looking at the size of the establishment by number of units it provides, increases were experienced by all, from 3 percentage points for those with 1-4 units and 19 percentage points for those with more than 10 units. The increase in occupancy levels during peak season was less marked (up 1 percentage point overall), despite those with more than 10 units experiencing a large increase (+22 percentage points).

Table 2: Self-catering occupancy rates by size of establishment, 2011 to 2013

	Annual Occupancy (%)				Peak Season Occupancy (%)			
	2011	2012	2013	Change 12/13 (pps ¹)	2011	2012	2013	Change 12/13 (pps ¹)
All establishments	27	28	31	+4	40	42	42	+1
1-4	26	24	27	+3	38	37	37	-
5-9	32	35	42	+6	43	54	58	+4
10+	36	34	53	+19	48	47	69	+22

Note (1) Change calculated using unrounded figures

Establishment Grade

During 2013, table 4 shows that four and five star establishments experienced the highest annual occupancy rates (34%). During 2011, NITB began a reclassification scheme on all self-catering establishments which is still ongoing. The sample size for one and two star establishments were too small to provide a reliable estimate.

The table also shows that regardless of the grade, all establishments experienced increases in the rates when comparing 2012 with 2013.

Table 4: Self-catering occupancy rates by establishment grade, 2011 to 2013

	Annual Occupancy (%)				Peak Season Occupancy (%)			
	2011 ³	2012	2013	Change 12/13 (pps ¹)	2011 ³	2012	2013	Change 12/13 (pps ¹)
All establishments ²	27	28	31	+4	40	42	42	+1
One star	*	*	*	*	*	*	*	*
Two star	*	*	*	*	*	*	*	*
Three star	25	28	30	+2	36	40	42	+1
Four star	30	29	34	+5	45	46	48	+3
Five star	26	30	34	+4	36	41	46	+5

Note (1) Percentage change calculated using unrounded figures

(2) All including unclassified, ungraded, one and two star establishments

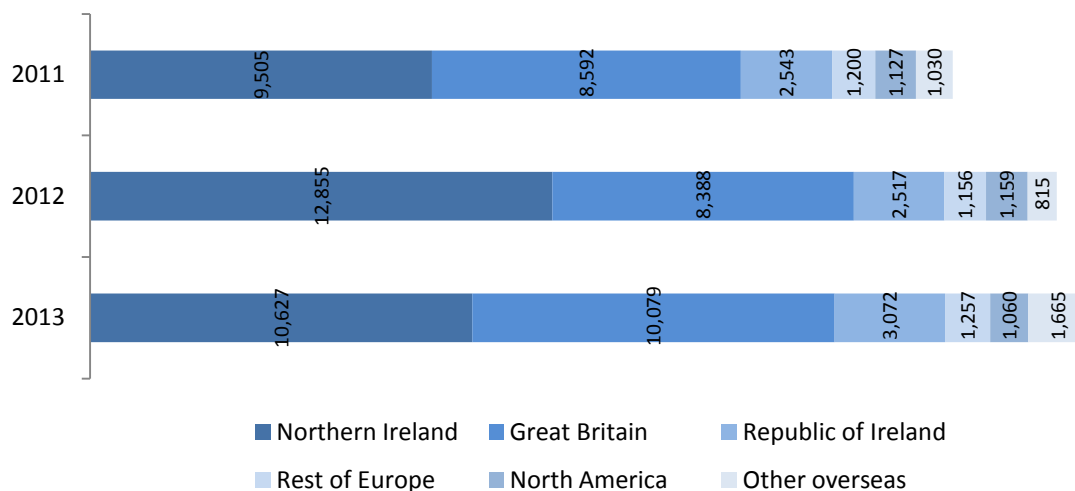
(3) Due to the reclassification, caution should be taken when comparing 2011 with other years

** sample size too small to provide a reliable estimate*

Country of Residence of Guests

In 2013, 64% of all weeks sold were to non-Northern Ireland visitors, showing a large increase from 2012 (53%). In real terms, the actual number of weeks sold to out-of-state visitors in 2013 was 18,772 an increase of 34% when compared to the number sold in 2012 (14,292).

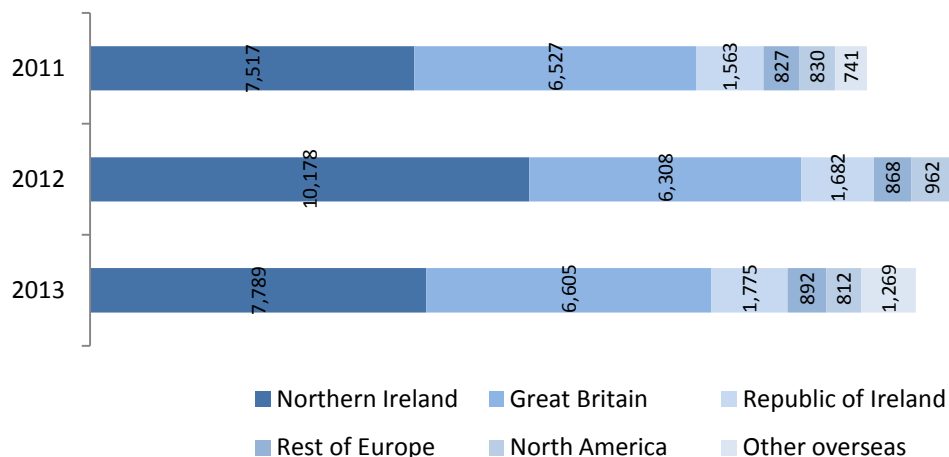
Figure 3: Total annual weeks sold by Country of Residence of guests 2011-2013



In 2013, guests from Great Britain made up 31% of total annual bookings in self-catering establishments compared to 36% in 2012. The Republic of Ireland was the next largest proportion of guests (9% of bookings in 2013).

Figure 4 illustrates the seasonal weeks sold in 2011-2013 broken down by the country of residence of the guests. The total number of seasonal weeks sold to out-of-state visitors was 12,459 (62% of all seasonal weeks sold in 2013). There were 17% more seasonal weeks sold to out-of-state visitors in 2013 than in the previous year. Great Britain makes up a third of seasonal weeks sold in 2013 (33%) and the Republic of Ireland makes up 9% (1,775).

Figure 4: Seasonal weeks sold by Country of Residence of guests 2011-2013



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.

It is estimated that there were 153,666 arrivals to self-catering establishments during 2013. This represents a decrease of 9% when compared with the 2012 arrival numbers. Forty-four percent of arrivals in 2013 were from Northern Ireland (67,894), with a third (33%) from Great Britain (50,061). When looking at the country of residence of arrivals, there is little change in the trends year on year, with Northern Ireland, Great Britain and Republic of Ireland remaining the three top countries of residence for arrivals. Figure 5 shows the breakdown of arrivals by country of residence for 2011-2013.

Figure 5: All arrivals by Country of Residence 2011-2013

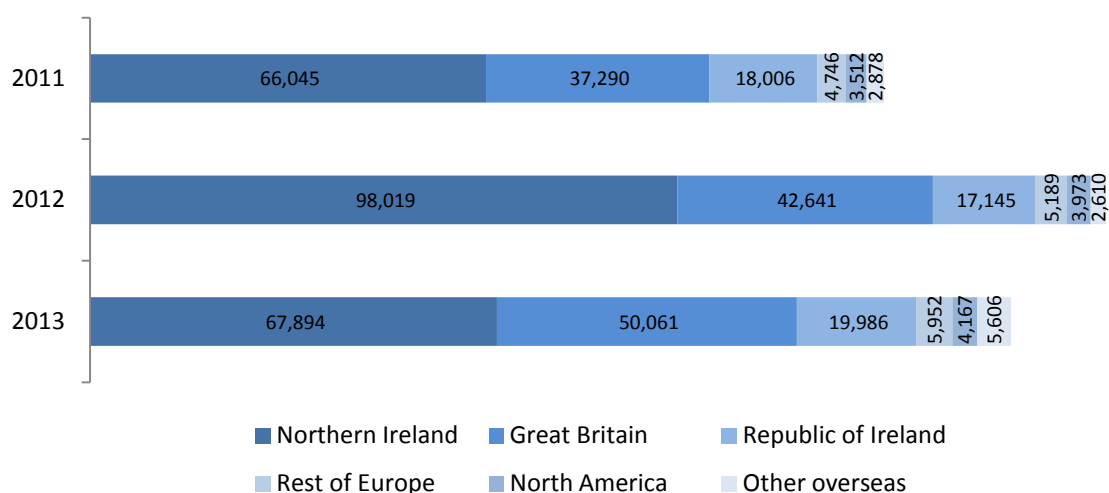


Figure 6 shows the seasonal arrivals broken by country of residence. Northern Ireland accounted for 45% of the seasonal arrivals in 2013, Great Britain accounted for 33% and the Republic of Ireland 11%.

Figure 6: All arrivals during peak season by Country of Residence 2011-2013

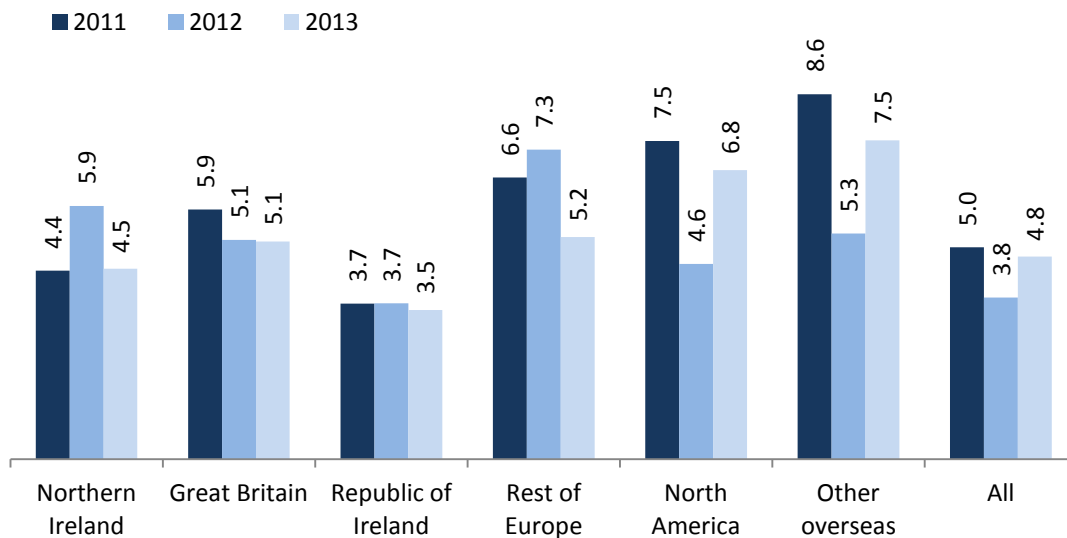


Average Length of Stay

In 2013 the average length of stay in self-catering accommodation was 4.8 nights. This was an increase of 25% when compared to 3.8 nights in 2012, but similar to that in 2011 (5.0).

In 2013, those from further away had longer lengths of stay (other overseas=7.5 nights annually, North America=6.8 and other Europe=5.2). Figure 7 shows the average length of stay by country of residence for 2011-2013.

Figure 7: Average Length of Stay by Country of Residence



Occupancy Survey - Methodology

Sample

To offer tourist accommodation in NI, 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'. Table 1 in the report showed the stock when the self-catering survey was issued.

The 2013 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 2013, there were a total of 1,436 establishments in the self-catering stock (table 1). Of these, 314 returned completed forms, 32 were closed/shut and a further 192 either refused or could not complete the form, resulting in a response rate of 26%.

Data was analysed by size of establishments, 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

“out-of-state visitors”

refers to visitors not from Northern Ireland

Full information on the revision of tourism statistics can be found at [Tourism Statistics Branch Revision Policy](#).

Further Information

For further information, please contact:
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<http://www.detini.gov.uk/deti-stats-index/tourism-statistics/stats-accomm-6.htm>

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