Fáilte Ireland
Hotel Review 2012

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Introduction

The Hotel Survey has been conducted by Bord Fáilte/Fáilte Ireland since 1963. Following a formal tendering process in 2008 and again in 2011, Fáilte Ireland commissioned Millward Brown Ulster to undertake the fieldwork and provide data tabulation of the survey on its behalf.

The aim of this survey is to monitor hotel performance, particularly occupancy levels, and to provide overall demand and supply trends, in relation to:

- grade;
- region;
- size; and
- location.

Fáilte Ireland and Millward Brown Ulster would like to acknowledge the invaluable support of those hotels included in the panel, without whose co-operation this survey would not be possible.

This report summarises the results of the hotel sector in the Republic of Ireland for 2012, and also draws comparisons with recent years. The Review of Hotel Performance in 2012 also presents highlights of the Visitor Attitude Survey 2012 which are pertinent to the hotel industry. A capacity update for 2013 is also included in this report.

The following Summary highlights the key points emerging from the 2012 survey. The body of the report focuses initially on the demand and supply aspects of the hotel industry, examining the current year and also the trends which have emerged in recent years. This is followed by an overview of the sources of business for hotels in Ireland in terms of markets.

The appendices contain detailed tables on supply, demand and occupancy rates at national and also at a seasonal, regional, grade, size and location level.

Notes

- National totals vary slightly depending on disaggregation.
- Due to the small number of 1* hotels in the panel, grades 2* and 1* have been combined to provide more meaningful results.
- Prior to 2008, hotel classification included an “Other” category which included unclassified hotels, hotels awaiting registration, hotels under refurbishment etc.

Executive Summary

- Both bed and room occupancy in hotels increased in 2012, both at their highest levels since 2007. Positively, there was also an increase in overseas visitors.

Capacity and Demand

- In 2013, the number of registered hotels decreased for the fourth consecutive year, decreases in all regions led to an overall drop of 2% nationally.
- There was an increase in registered room capacity in the North West region in 2013, however decreases in all the other regions has resulted in a 1% decrease overall.
- In 2012, there were decreases in capacity across all regions, with the exception of the South East, coupled with an increasing demand in 2012. This resulted in increases in both bed occupancy (41% in 2011 and 44% in 2012) and room occupancy rates (56% in 2011 and 60% in 2012).
- The falling capacity and increasing demand mean that both bed and room occupancy rates are at their highest recorded levels since 2007.

Grade

- Grade 5* hotels experienced the highest occupancy rates throughout 2012 and experienced a 3 percentage point increase when compared to 2011.
- More than half (56%) of all bednight sales in Grade 5* hotels are attributable to overseas visitors, with North American (31%) and British (11%) guests being most prevalent.
- Domestic visitors made up the majority of bednights across all other grades, accounting for more than three quarters (76%) of bednights in Grade 4* hotels.

Regions

- Demand has outstripped supply in 2012 resulting in an increase in room occupancy rates in all regions with the exception of Shannon. Room occupancy rates in Shannon dropped slightly to 50% from 51% in the previous three years.
- Despite only accounting for 30% of the total market at a national level, overseas visitors account for more than two fifths (45%) of all bednights sold in Dublin during 2012.
- The domestic market is very important in the South East and East & Midlands regions where it accounts for more than three quarters of all bednights sold. Northern Ireland is also very important to the North West where it accounts for more than a quarter (26%) of all bednight sales.

Hotel Size

- Large hotels experienced a 2% decrease in capacity; however, demand also increased resulting in an overall increase of 3 percentage points in occupancy rates for Large hotels (100+ rooms) in 2012.
- All other size category of hotels experienced a 4 percentage point increase in annual room occupancy rates, all at their highest levels since 2007.
- Overseas visitors were most prevalent in large hotels (100+ rooms) accounting for one third (33%) of all guests in this category.

Location

- Overseas visitors accounted for 39% of all hotel nights in Major Metropolitan Areas (MMAs). In Other Urban and Rural locations just over one fifth (22%) of guest nights are attributable to overseas visitors.

Markets

- Overall guestnight demand increased by 3% in 2012.
- The increase in demand in 2012 was mainly due to the increases across the North America, mainland Europe, Rest of the World and Northern Ireland markets.
- The overseas share of guest nights has slightly increased to 30% in 2012, bringing it back on par with the levels achieved in 2010.
- The number of domestic guest nights decreased slightly in 2012 resulting in a 2 percentage point decrease in market share. Domestic visitors account for almost two thirds (65%) of all guest nights.

1 Capacity and Demand

Table 1.1 Number of Registered Hotels

	2008	2009	2010	2011	2012	2013	Growth Rate 2013 vs 2012
Dublin	154	160	159	157	154	151	-2
East & Midlands	124	130	124	119	114	113	-1
South East	112	112	111	105	104	99	-5
South West	163	166	163	161	157	153	-3
Shannon	90	92	90	88	83	81	-2
West	144	148	145	141	137	134	-2
North West	107	107	110	112	107	104	-3
	894	**915**	**902**	**883**	**856**	**835**	**-2**

Table 1.2 Registered Room Capacity in Peak Season (000's)

	2008	2009	2010	2011	2012	2013	Growth Rate 2013 vs 2012
Dublin	18.6	19.1	19.2	18.9	18.6	18.5	-1
East & Midlands	6.7	7.1	6.9	6.8	6.5	6.4	-2
South East	5.6	5.6	5.6	5.4	5.4	5.3	-2
South West	10.6	10.4	10.3	10.1	9.9	9.7	-2
Shannon	5.5	5.4	5.4	5.3	5.1	5.0	-2
West	6.8	7.1	7.3	7.2	7.0	6.9	-1
North West	5.2	5.3	5.5	5.6	5.4	5.5	+2
	59.0	**60.1**	**60.2**	**59.3**	**57.9**	**57.4**	**-1**

Table 1.3 Average Hotel Occupancy Rates (%)

	2007	2008	2009	2010	2011	2012
Bed Occupancy	46	43	42	41	41	44
Room Occupancy	64	58	56	56	56	60

Table 1.4 Bednights (000's)

	2007	2008	2009	2010	2011	2012
Bednights Capacity	44,852	48,227	50,273	50,056	50,180	48,393
Bednights Sold	20,839	20,554	20,949	20,433	20,824	21,346
Bed Occupancy (%)	46	43	42	41	41	44

Table 1.5 Roomnights (000's)

	2007	2008	2009	2010	2011	2012
Roomnights Capacity	19,273	21,019	21,276	21,160	21,269	20,650
Roomnights Sold	12,284	12,294	11,978	11,785	11,997	12,356
Room Occupancy (%)	64	58	56	56	56	60

- In 2013, the number of registered hotels decreased for the fourth consecutive year, decreases in all regions led to an overall drop of 2% nationally.
- There was an increase in registered room capacity in the North West region in 2013, however decreases in all the other regions has resulted in a 1% decrease overall.
- Registered room capacity has declined at national level for the third consecutive year.
- In 2012, the decreases in capacity across all regions, with the exception of the South East, coupled with an increasing demand in 2012, resulted in increasing bed and room occupancy rates.
- Falling capacity and increasing demand mean that both bed and room occupancy rates are at their highest recorded levels since 2007.

2 Grade

2.1 Capacity and Demand (000's)

	5*	4*	3*	2* & 1*[1]
Bed Capacity				
2012	3,086	20,963	21,791	2,522
2011	3,073	20,838	23,340	2,884
Year on Year Change (%)	nc	+1%	-7%	-13%
Bed Nights Sold				
2012	1,561	9,224	9,725	822
2011	1,381	8,597	9,998	829
Year on Year Change (%)	+13%	+7%	-3%	-1%
Room Capacity				
2012	1,359	9,061	9,079	1,136
2011	1,368	8,982	9,608	1,288
Year on Year Change (%)	-1%	+1%	-6%	-12%
Room Nights Sold				
2012	901	5,305	5,616	524
2011	860	5,088	5,495	540
Year on Year Change (%)	+5%	+4%	+2%	-3%

[1] Due to the small numbers of Grade 2* & 1* hotels, these Grades have been combined for analysis purposes.

Table 2.2 Market Guest Nights within Grade 2012 (%)

	5*	4*	3*	2* & 1*
Britain	11	7	10	11
Mainland Europe	8	6	14	19
North America	31	6	8	5
Rest of World	6	1	3	5
Total Overseas	**56**	**20**	**35**	**39**
Northern Ireland	2	4	5	7
Republic of Ireland	41	76	59	55
Total	**100**	**100**	**100**	**100**

Note: Not all totals add to 100% (or the equivalent overseas total) due to rounding

2.3 Room Occupancy – By Grade 2012 (%)

	All	5*	4*	3*	2*&1*
Jan-Mar	47	57	47	47	35
April	59	65	59	60	42
May	66	66	65	69	47
June	71	74	70	74	55
July	72	78	70	76	55
August	78	85	77	80	61
September	72	75	71	75	55
Oct-Dec	51	59	49	54	43
Total	**60**	**66**	**59**	**62**	**46**

Table 2.4 Room Occupancy – By Grade (%)

	2010	2011	2012
Grade 5*	56	63	66
Grade 4*	55	57	59
Grade 3*	58	57	62
Grade 1* and 2*	42	42	46
Total	**56**	**56**	**60**

- Grade 5* hotels experienced the highest occupancy rates throughout 2012 and experienced a 3 percentage point increase when compared to 2011.
- Grade 1* and 2* hotels performed poorly only achieving 46% occupancy in 2012; however, this was a 4 percentage point increase on the occupancy rate recorded for 2011.
- There was a slight increase in Grade 4* hotel room occupancy rates, however, Grade 3* hotels experienced significant recovery from the drop in 2011.
- More than half (56%) of all bednight sales in Grade 5* hotels are attributable to overseas visitors, with North American (31%) and British (11%) guests being most prevalent.
- Domestic visitors made up the majority of bednights across all other grades, accounting for more than three quarters (76%) of bednights in Grade 4* hotels.

3 Regions

Table 3.1 Capacity and Demand (000's)

	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Bed Capacity							
2012	15,728	5,585	4,585	8,158	4,154	5,799	4,384
2011	16,022	5,748	4,708	8,279	4,462	6,334	4,627
Year on Year Change	*-2%*	*-3%*	*-3%*	*-1%*	*-7%*	*-8%*	*-5%*
Bed Nights Sold							
2012	7,603	1,870	2,013	3,867	1,542	2,648	1,802
2011	7,334	1,537	1,885	4,034	1,686	2,645	1,702
Year on Year Change	*+4%*	*+22%*	*+7%*	*-4%*	*-9%*	*nc*	*+6%*
Room Capacity							
2012	6,772	2,352	1,921	3,421	1,786	2,451	1,948
2011	6,908	2,440	1,938	3,492	1,893	2,585	2,011
Year on Year Change	*-2%*	*-4%*	*-1%*	*-2%*	*-6%*	*-5%*	*-3%*
Room Nights Sold							
2012	4,684	1,055	1,106	2,074	885	1,520	1,031
2011	4,451	982	1,065	2,081	974	1,481	964
Year on Year Change	*+5%*	*+7%*	*+4%*	*nc*	*-9%*	*+3%*	*+7%*

Table 3.2 Room Occupancy – by Region 2012 (%)

	Total	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Year	**60**	**69**	**45**	**58**	**61**	**50**	**62**	**53**
Jan-Mar	47	59	35	41	47	37	45	40
April	59	69	45	60	58	46	58	53
May	66	77	51	65	65	55	67	55
June	71	80	51	69	75	61	77	64
July	72	77	53	75	77	56	84	64
August	78	78	63	79	88	68	89	73
September	72	80	50	76	74	63	82	63
Oct-Dec	51	63	39	47	47	43	49	47

Table 3.3 Distribution of Regional Guest Nights by Market Area 2012 (%)

	Total	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Britain	8	12	8	6	7	6	4	9
Mainland Europe	10	17	3	4	7	13	6	6
North America	9	11	3	6	11	7	9	4
Rest of World	3	4	1	1	2	1	3	2
Total Overseas	**30**	**45**	**15**	**18**	**27**	**28**	**23**	**20**
Northern Ireland	4	2	6	1	3	1	3	26
Republic of Ireland	65	53	79	81	70	72	74	54
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Note: Not all total add to 100% (or the equivalent overseas total) due to rounding

Table 3.4 Regional Room Occupancy (%)

	2007	2008	2009	2010	2011	2012
Dublin	72	66	63	62	64	69
East & Midlands	54	46	40	42	40	45
South East	57	56	58	57	55	58
South West	66	58	61	58	60	61
Shannon	61	58	51	51	51	50
West	60	59	57	56	57	62
North West	57	51	47	50	48	53

- Demand has outstripped supply in 2012 resulting in an increase in room occupancy rates in all regions with the exception of Shannon.
- Room occupancy rates in Shannon dropped slightly to 50% from 51% in the previous three years.
- Dublin, East and Midlands, the West and the North West regions all experienced a significant increase in room occupancy (+5%). The increases in room occupancy in these regions mean that most are at their highest recorded occupancy levels over the past four or five years.
- Hotels in the West achieved room occupancy rates in excess of 80% for the period July to September.
- Although the overseas market only accounts for 30% of total bednights sold, more than two fifths (45%) of all bednights sold in Dublin were attributable to overseas visitors.
- Visitors from Northern Ireland accounted for between 1% and 6% of bednights sold in all regions, with the exception of the North West, where more than a quarter (26%) of total bednight sales are attributable to this market.
- The domestic market accounted for more than three quarters of all bednights sold in the South East and East & Midlands regions. Dublin and the North West are the least dependent regions on the domestic market with less than three fifths (53% and 54% respectively) of all guestnights attributable to the home market.

4 Hotel Size

Table 4.1 Capacity and Demand by Hotel Size (000's)

	1 - 20 Rooms	21 – 49 Rooms	50 – 99 Rooms	100+ Rooms
Bed Capacity				
2012	2,213	6,219	13,536	26,426
2011	2,330	6,657	14,049	27,145
Year on Year Change	*-5%*	*-7%*	*-4%*	*-3%*
Bed Nights Sold				
2012	781	2,607	5,959	11,999
2011	736	2,606	5,810	11,672
Year on Year Change	*+6%*	*nc*	*+3%*	*+3%*
Room Capacity				
2012	1,009	2,647	5,736	11,259
2011	1,053	2,802	5,868	11,547
Year on Year Change	*-4%*	*-6%*	*-2%*	*-2%*
Room Nights Sold				
2012	481	1,497	3,359	7,018
2011	462	1,477	3,247	6,811
Year on Year Change	*+4%*	*+1%*	*+3%*	*+3%*

Table 4.2 Room Occupancy – by Hotel Size 2012 (%)

	Total	1 - 20 Rooms	21 – 49 Rooms	50 – 99 Rooms	100+ Rooms
Year	**60**	**48**	**57**	**59**	**62**
Jan – Mar	47	35	42	45	51
April	59	44	55	57	62
May	66	50	61	64	69
June	71	58	69	70	74
July	72	59	71	73	73
August	78	65	77	80	79
September	72	59	69	72	74
Oct – Dec	51	42	48	49	54

Table 4.3 Distribution of Guest Nights by Market Area, by Hotel Size 2012 (%)

	Total	1 - 20 Rooms	21 – 49 Rooms	50 – 99 Rooms	100+ Rooms
Britain	8	8	8	7	9
Mainland Europe	10	9	10	8	12
North America	9	5	7	9	9
Rest of World	3	3	3	2	3
Total Overseas	**30**	**25**	**28**	**27**	**33**
Northern Ireland	4	7	7	5	3
Republic of Ireland	65	69	65	68	64
Total	**100**	**100**	**100**	**100**	**100**

Note: Not all totals add to 100% (or the equivalent overseas total) due to rounding

Table 4.4 Room Occupancy (%) by Hotel Size

	2007	2008	2009	2010	2011	2012
1 - 20 Rooms	44	46	43	45	44	48
21 – 49 Rooms	56	55	53	53	53	57
50 – 99 Rooms	59	58	55	55	55	59
100+ Rooms	72	61	59	57	59	62

- Demand for rooms in hotels with 1-20 rooms increased by 4% while supply actually decreased by 4%. This resulted in a 4 percentage point increase in occupancy rates for hotels with 1-20 rooms.
- Demand for rooms in hotels with 21-49 rooms increased by 1% although supply decreased by 6%. This resulted in a 4 percentage point increase in occupancy rates for hotels with 21-49 rooms.
- Demand for rooms in hotels with 50-99 rooms increased by 3, however, supply decreased by 2%. This also resulted in a 4 percentage point increase in occupancy rates for hotels with 50-99 rooms.
- The large hotels experienced a 2% decrease in capacity; however, demand also increased resulting in an overall increase of 3 percentage points in occupancy rates for the large hotels (100+ rooms) in 2012.
- The large hotels (100+ rooms) had the highest proportion of overseas visitors (33%), with mainland Europe (12%) guests being the most prevalent source of business within this category.

5 Location

Table 5.1 Capacity and Demand by Location (000's)

	MMA	Other Urban	Rural
Bed Capacity			
2012	22,525	8,256	17,611
2011	23,130	8,384	18,667
Year on Year Change	*-3%*	*-2%*	*-6%*
Bed Nights Sold			
2012	10,577	3,461	7,309
2011	10,314	3,359	7,151
Year on Year Change	*+3%*	*+3%*	*+2%*
Room Capacity			
2012	9,672	3,384	7,595
2011	9,895	3,459	7,914
Year on Year Change	*-2%*	*-2%*	*-4%*
Room Nights Sold			
2012	6,359	1,855	4,142
2011	6,123	1,811	4,064
Year on Year Change	*+4%*	*+2%*	*+2%*

Table 5.2 Room Occupancy – by Location 2012 (%)

	Total	MMA	Other Urban	Rural
Year	**60**	**66**	**55**	**55**
Jan – Mar	47	54	42	40
April	59	65	53	54
May	66	73	60	59
June	71	78	66	66
July	72	77	68	68
August	78	80	78	76
September	72	78	66	67
Oct – Dec	51	58	45	45

Table 5.3 Distribution of Guest Nights by Market Area, by Location 2012 (%)

	All	MMA	Other Urban	Rural
Britain	8	10	7	7
Mainland Europe	10	14	6	6
North America	9	11	7	7
Rest of World	3	4	2	2
Total Overseas	**30**	**39**	**22**	**22**
Northern Ireland	4	2	5	8
Republic of Ireland	65	59	73	71
Total	**100**	**100**	**100**	**100**

Note: Not all totals add to 100% (or the equivalent overseas total) due to rounding

Table 5.4 Room Occupancy (%) by Location

	2007	2008	2009	2010	2011	2012
MMA	70	64	61	60	62	66
Other Urban	62	55	53	52	52	55
Rural	59	54	52	52	51	55

- The increases in room occupancy across all locations are due to falling supply coupled with an increasing demand for rooms.
- Rural areas experienced increased demand (+2%), coupled with a decrease (-4%) in the supply of rooms which has resulted in an overall increase of 4 percentage points in room occupancy.
- Major Metropolitan Areas (MMAs) also experienced an increase in demand (+4%), coupled with a decrease (-2%) in the supply of rooms which has resulted in an overall increase of 4 percentage points in room occupancy.
- Overseas visitors accounted for 39% of all hotel nights in Major Metropolitan Areas (MMAs). In Other Urban and Rural locations just over one fifth (22%) of guest nights are attributable to overseas visitors.

6 Markets

Table 6.1 Hotel Guest Nights by Market Area (000's)

	2007	2008	2009	2010	2011	2012	% Change 2012/2011
Britain	3,120	2,753	2,238	2,184	1,987	1,807	-9
Mainland Europe	1,718	1,568	2,151	1,990	2,084	2,221	+7
North America	1,818	1,424	1,569	1,468	1,337	1,861	+39
Rest of World	634	679	590	516	530	585	+10
Total Overseas	**7,289**	**6,424**	**6,549**	**6,159**	**5,939**	**6,473**	**+9**
Northern Ireland	862	782	863	961	899	956	+6
Republic of Ireland	12,687	13,348	13,537	13,314	13,986	13,917	nc
Total	**20,839**	**20,554**	**20,949**	**20,433**	**20,824**	**21,346**	**+3**

Table 6.2 Share of Hotel Guest Nights by Market Area (%)

	2007	2008	2009	2010	2011	2012
Britain	15	13	11	11	10	8
Mainland Europe	8	8	10	10	10	10
North America	9	7	7	7	6	9
Rest of World	3	3	3	3	3	3
Total Overseas	**35**	**31**	**31**	**30**	**29**	**30**
Northern Ireland	4	4	4	5	4	4
Republic of Ireland	61	65	65	65	67	65

Table 6.3 Distribution of Market Guest Nights (%) 2012

	Jan - Mar	April	May	June	July	Aug	Sept	Oct - Dec
Britain	9	9	9	9	8	8	8	8
Mainland Europe	8	12	13	12	12	11	10	9
North America	5	7	10	11	12	10	14	6
Rest of World	2	2	4	4	3	2	3	3
Total Overseas	**24**	**30**	**36**	**35**	**34**	**31**	**36**	**26**
Northern Ireland	5	6	3	4	5	4	4	5
Republic of Ireland	71	65	61	61	61	64	60	70
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Note: Not all totals add to 100% (or the equivalent overseas total) due to rounding

- Overall guestnight demand increased by 3% in 2012.
- The increase in demand in 2012 was mainly due to the increases across the Northern Ireland, North America, mainland Europe and Rest of the World markets.
- There has been a 9% increase in the overseas market, driven mainly by significant increases in demand from North America and Mainland Europe.
- The overseas share of guest nights has slightly increased to 30% in 2012, bringing it back on par with the levels achieved in 2010.
- The number of domestic guest nights decreased marginally (by less than 1%) in 2012 resulting in a 2 percentage point decrease in market share. Domestic visitors now account for almost two thirds (65%) of all guest nights.
- There has been a big decrease (-9%) in demand from the British market; the decrease was significant enough to reduce market share to 8%, its lowest level in the past 6 years.

7 Holidaymakers' Attitudes to Hotels

Chart 7.1 Rating of Hotels on Aspects of the Dining Experience

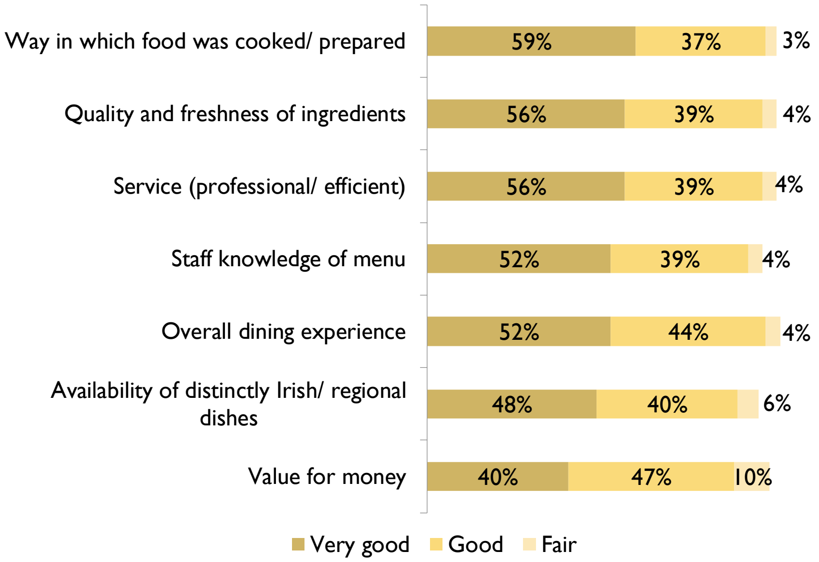

Chart 7.2 Rating of Hotels on Aspects of the Accommodation Experience

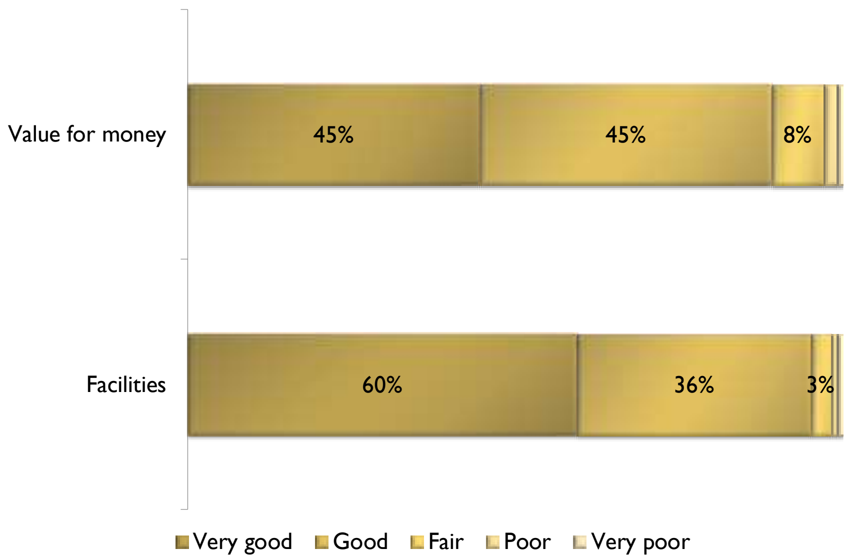

Chart 7.3 Areas for Improvement in the Hotel Accommodation Experience

Top reasons for giving a fair to poor rating on hotel facilities (4% or 143 respondents)	
1	Poorly equipped rooms
2	Poorly maintained property
3	Not enough hygiene / cleanliness
4	Staff not helpful
5	Slow service
6	Lack of internet access

- Over 8,000 overseas and domestic holidaymakers were interviewed about their holiday experience during the summer of 2012. Holidaymakers were interviewed in the course of their holiday in locations around Ireland.
- More than one third of those interviewed (34%) had eaten in a hotel. They rated their dining experiences in hotels very highly. More than 90% rated aspects of their food and the service they enjoyed as very good or good.
- A slightly lower proportion, 88%, rated the availability of distinctly Irish/regional dishes in hotels highly. A similar proportion, 87%, said that the value for money of their hotel dining experience was good or very good.
- More than two in five (45%) of respondents had spent at least one night in a hotel. Nine out of ten said the value for money in hotel accommodation was good or very good. Hotel facilities were highly rated by 96% of respondents.
- The minority of respondents (4% or 143 holidaymakers interviewed) who were less than satisfied with hotel facilities mentioned issues such as poorly equipped bedrooms, poorly maintained properties, hygiene, staff issues and lack of internet access.

APPENDICES

Appendix A – Capacity

Table 1.1 Registered Bed Capacity in Peak Season[1] (000's)

	2008	2009	2010	2011	2012	2013	Growth Rate 2013 vs 2012 (%)
Dublin	39.5	41.1	44.9	43.8	43.2	43.0	-1
East and Midlands	15.2	15.6	16.3	15.9	15.3	15.1	-1
South East	13.7	12.3	13.6	13.1	12.8	12.7	-1
South West	24.3	22.7	24.6	24.1	23.2	22.6	-3
Shannon	13.0	11.6	12.6	12.5	11.9	11.7	-2
West	16.6	15.7	17.4	17.5	16.4	16.3	-1
North West	11.9	11.5	12.7	12.9	12.2	12.1	-1
Total	**134.2**	**130.3**	**142.1**	**139.9**	**135.0**	**133.5**	**-1**

Table 1.2 Registered Hotel Premises – By Grade

	2007	2008	2009	2010	2011	2012	2013
Grade 5*	24	30	32	34	34	35	34
Grade 4*	125	230	246	269	267	271	272
Grade 3*	321	402	407	398	391	376	366
Grade 2*	144	176	168	160	152	141	131
Grade 1*	33	50	43	36	34	30	32
Total	**868**	**905**	**915**	**902**	**883**	**856**	**835**

NOTES:

A new classification system was introduced in 2008 so direct comparisons with 2007 (or earlier) are not advisable. Other hotels include hotels awaiting registration, hotels under refurbishment and hotels for which classification is under review.

[1] Please note 2009 bed capacity has been revised.

Table 1.3 Hotel Beds and Rooms by Grade 2013

	Rooms	Beds
Grade 5*	3,776	8,169
Grade 4*	25,434	58,591
Grade 3*	25,011	59,773
Grade 2*	2,700	6,003
Grade 1*	441	937
Total	**57,362**	**133,473**

Appendix B – Demand

Table 2.1 Timing of Demand – Bednights Sold (000's)

	2007	2008	2009	2010	2011	2012
January – March	3,832	4,001	3,914	3,724	3,704	3,945
April	1,743	1,617	1,688	1,667	1,835	1,792
May	1,850	1,937	1,882	1,816	1,829	1,979
June	2,043	1,928	1,959	2,013	2,070	2,150
July	2,285	2,308	2,348	2,310	2,437	2,416
August	2,496	2,450	2,693	2,541	2,585	2,644
September	2,069	1,885	1,965	2,021	2,016	2,091
October – December	4,520	4,427	4,501	4,341	4,350	4,330
Total	**20,839**	**20,554**	**20,949**	**20,433**	**20,824**	**21,346**

Table 2.2 Timing of Demand – Roomnights Sold (000's)

	2007	2008	2009	2010	2011	2012
January – March	2,371	2,462	2,321	2,230	2,235	2,360
April	1,044	1,021	942	966	1,021	1,015
May	1,140	1,146	1,109	1,081	1,108	1,180
June	1,240	1,158	1,135	1,137	1,184	1,244
July	1,282	1,302	1,294	1,258	1,330	1,295
August	1,304	1,356	1,396	1,352	1,368	1,404
September	1,239	1,172	1,159	1,206	1,185	1,256
October – December	2,665	2,677	2,624	2,553	2,566	2,603
Total	**12,284**	**12,294**	**11,978**	**11,785**	**11,997**	**12,356**

Table 2.3 Monthly Room Occupancy Rates (%)

	2007	2008	2009	2010	2011	2012
January	44	43	40	36	37	37
February	54	48	47	46	47	49
March	56	53	48	50	48	55
April	65	58	53	54	57	59
May	67	63	60	59	60	66
June	76	65	63	63	66	71
July	76	71	70	68	72	72
August	77	74	75	73	74	78
September	76	66	64	67	66	72
October	66	61	60	60	56	60
November	55	49	46	46	47	50
December	47	46	45	42	42	44
Total	**64**	**58**	**56**	**56**	**56**	**60**

Table 2.4 Monthly Bed Occupancy Rates (%)

	2007	2008	2009	2010	2011	2012
January	30	29	28	24	25	26
February	38	34	33	32	33	35
March	40	39	35	36	34	40
April	46	40	40	40	44	44
May	47	46	43	42	42	47
June	54	47	46	47	49	53
July	58	55	54	53	56	57
August	63	58	61	58	59	63
September	54	46	46	48	48	51
October	46	43	45	45	40	42
November	41	34	32	31	34	35
December	34	36	33	30	30	31
Total	**46**	**43**	**42**	**41**	**41**	**44**

Appendix C - Grade

Table 3.1 Bed Occupancy – By Grade 2012 (%)

	All	Grade 5*	Grade 4*	Grade 3*	Grade 2* and 1*
Jan – Mar	34	42	34	34	25
April	44	50	45	45	30
May	47	48	47	49	32
June	53	55	52	54	40
July	57	64	58	57	40
August	63	72	64	62	45
September	51	57	51	52	38
Oct – Dec	36	44	35	37	29
Total	**44**	**51**	**44**	**45**	**33**

Table 3.2 Distribution of Market Guestnights by Grade 2012 (%)

	Grade 5*	Grade 4*	Grade 3*	Grade 2* and 1*	Total
Britain	10	34	52	5	100
Mainland Europe	6	24	63	7	100
North America	26	31	40	2	100
Rest of World	15	21	57	7	100
Northern Ireland	4	36	55	6	100
Republic of Ireland	5	51	42	3	100

Table 3.3 Room Occupancy – By Grade (%)

	2010	2011	2012
Grade 5*	56	63	66
Grade 4*	55	57	59
Grade 3*	58	57	62
Grade 1* & 2*	42	42	46
Total	**56**	**56**	**60**

Table 3.4 Bed Occupancy – By Grade (%)

	2010	2011	2012
Grade 5*	44	45	51
Grade 4*	40	41	44
Grade 3*	43	43	45
Grade 1* & 2*	29	29	33
Total	**41**	**41**	**44**

Appendix D – Regions

Table 4.1 Room Occupancy – By Region (%)

	2007	2008	2009	2010	2011	2012
Dublin	72	66	63	62	64	69
East and Midlands	54	46	40	42	40	45
South East	57	56	58	57	55	58
South West	66	58	61	58	60	61
Shannon	61	58	51	51	51	50
West	60	59	57	56	57	62
North West	57	51	47	50	48	53
Total	**64**	**58**	**56**	**56**	**56**	**60**

Table 4.2 Bed Occupancy – By Region (%)

	2007	2008	2009	2010	2011	2012
Dublin	53	47	46	44	46	48
East and Midlands	36	31	28	27	27	33
South East	41	42	42	42	40	44
South West	48	41	47	46	49	47
Shannon	41	42	37	38	38	37
West	46	48	42	41	42	46
North West	44	37	37	40	37	41
Total	**46**	**43**	**42**	**41**	**41**	**44**

Table 4.3 Bed Occupancy – By Region 2012 (%)

	Total	Dublin	South East	South West	Shannon	West	North West	East and Midlands
Year	**44**	**48**	**44**	**47**	**37**	**46**	**41**	**33**
Jan – Mar	34	40	30	36	26	31	30	25
April	44	49	48	45	35	45	42	34
May	47	53	48	49	40	48	41	36
June	53	56	52	59	47	55	51	39
July	57	60	60	62	45	65	58	42
August	63	57	66	76	55	73	61	52
September	51	53	56	58	45	57	45	36
Oct – Dec	36	43	35	35	31	35	34	29

Appendix E – Grade within Region

Table 5.1 Bed Occupancy Rates – Grade within Region 2012 (%)

	Total	Grade 4* and 5*	Grade 3*	Grade 2* and 1*
Dublin	48	46	51	50
East & Midlands	33	34	35	21
South East	44	51	37	35
South West	47	49	47	24
Shannon	37	41	36	24
West	46	45	48	28
North West	41	45	41	17

Table 5.2 Room Occupancy Rates – Grade within Region 2012 (%)

	Total	Grade 4* and 5*	Grade 3*	Grade 2* and 1*
Dublin	69	63	76	74
East & Midlands	45	46	47	26
South East	58	64	51	44
South West	61	61	63	34
Shannon	50	53	49	36
West	62	65	62	41
North West	53	58	52	24

Appendix F – Hotel Size

Table 6.1 Room Occupancy – By Hotel Size (%)

	2007	2008	2009	2010	2011	2012
1-20 Rooms	44	46	43	45	44	48
21-49 Rooms	56	55	53	53	53	57
50-99 Rooms	59	58	55	55	55	59
100+ Rooms	72	61	59	57	59	62
Total	**64**	**58**	**56**	**56**	**56**	**60**

Table 6.2 Bed Occupancy – By Hotel Size (%)

	2007	2008	2009	2010	2011	2012
1-20 Rooms	31	33	31	33	32	35
21-49 Rooms	42	40	39	39	39	42
50-99 Rooms	42	43	41	41	41	44
100+ Rooms	50	44	44	42	43	45
Total	**46**	**43**	**42**	**41**	**41**	**44**

Table 6.3 Bed Occupancy – By Hotel Size 2012 (%)

	Total	1-20 Rooms	21-49 Rooms	50-99 Rooms	100+ Rooms
Jan – March	34	25	30	33	36
April	44	33	42	44	46
May	47	36	44	46	49
June	53	43	52	53	54
July	57	46	56	58	58
August	63	51	62	66	62
September	51	42	49	52	52
Oct – Dec	36	30	34	36	38
Total	**44**	**35**	**42**	**44**	**45**

Table 6.4 Distribution of Guestnights by Market Area by Hotel Size 2012 (%)

	1-20 Rooms	21-49 Rooms	50-99 Rooms	100+ Rooms
Britain	8	8	7	9
Mainland Europe	9	10	8	12
North America	5	7	9	9
Rest of World	3	3	2	3
Northern Ireland	7	7	5	3
Republic of Ireland	69	65	68	64
Total	**100**	**100**	**100**	**100**

Appendix G – Location

Table 7.1 Room Occupancy – By Location (%)

	2007	2008	2009	2010	2011	2012
MMA	70	64	61	60	62	66
Other Urban	62	55	53	52	52	55
Rural	59	54	52	52	51	55
Total	**64**	**58**	**56**	**56**	**56**	**60**

Table 7.2 Bed Occupancy – By Location (%)

	2007	2008	2009	2010	2011	2012
MMA	48	46	45	43	45	47
Other Urban	45	39	40	39	40	42
Rural	44	40	39	39	38	41
Total	**46**	**43**	**42**	**41**	**41**	**44**

Table 7.3 Bed Occupancy – By Location 2012 (%)

	MMA	Other Urban	Rural
January – March	38	31	30
April	47	41	42
May	51	44	43
June	55	52	50
July	60	55	56
August	61	65	64
September	54	50	49
October – December	40	33	33
Total	**47**	**42**	**41**

Appendix H – Markets

Table 8.1 Seasonality of Guestnights within Market Area 2012 (%)

	Jan-Mar	April	May	June	July	Aug	Sept	Oct-Dec	Total
Britain	21	9	9	10	11	11	10	19	100
Mainland Europe	14	10	12	12	13	13	9	17	100
North America	11	7	11	13	15	14	16	14	100
Rest of World	14	7	12	13	11	10	12	20	100
Northern Ireland	19	10	7	9	12	12	9	22	100
Republic of Ireland	20	8	9	9	11	12	9	22	100

Appendix I – Hotel Stock by Region 2013

Table 9.1 Dublin

	Premises	Rooms	Beds
Grade 5*	9	1,492	3,427
Grade 4*	45	7,821	17,417
Grade 3*	71	8,343	20,151
Grade 2*	21	770	1,782
Grade 1*	5	104	227
Total	**151**	**18,530**	**43,004**

Table 9.2 East and Midlands

	Premises	Rooms	Beds
Grade 5*	5	527	1,151
Grade 4*	37	3,441	8,398
Grade 3*	48	2,086	4,811
Grade 2*	21	352	718
Grade 1*	2	24	47
Total	**113**	**6,430**	**15,125**

Table 9.3 South East

	Premises	Rooms	Beds
Grade 5*	3	246	502
Grade 4*	38	2,631	6,253
Grade 3*	39	2,154	5,349
Grade 2*	13	195	415
Grade 1*	6	81	456
Total	**99**	**5,307**	**12,975**

Table 9.4 South West

	Premises	Rooms	Beds
Grade 5*	10	935	1,881
Grade 4*	54	4,381	10,319
Grade 3*	65	4,009	9,481
Grade 2*	19	321	776
Grade 1*	5	52	111
Total	**153**	**9,698**	**22,568**

Table 9.5 Shannon

	Premises	Rooms	Beds
Grade 5*	3	254	564
Grade 4*	22	1,465	3,334
Grade 3*	40	2,947	7,056
Grade 2*	14	319	684
Grade 1*	2	22	50
Total	**81**	**5,007**	**11,688**

Table 9.6 West

	Premises	Rooms	Beds
Grade 5*	3	227	454
Grade 4*	43	3,074	7,095
Grade 3*	58	3,139	7,700
Grade 2*	23	383	833
Grade 1*	7	97	216
Total	**134**	**6,920**	**16,298**

Table 9.7 North West

	Premises	Rooms	Beds
Grade 5*	1	95	190
Grade 4*	33	2,621	5,775
Grade 3*	45	2,333	5,225
Grade 2*	20	360	795
Grade 1*	5	61	130
Total	**104**	**5,470**	**12,115**

Appendix J – Hotel Stock by County 2013

Table 10.1 Hotel Stock by County 2013

County	Premises	Rooms
Carlow	10	540
Cavan	17	846
Clare	41	2,323
Cork	77	4,424
Donegal	56	2,941
Dublin	151	18,530
Galway	83	4,498
Kerry	76	5,274
Kildare	23	1,152
Kilkenny	17	1,138
Laois	10	524
Leitrim	7	263
Limerick	28	2,180
Longford	3	81
Louth	13	793
Mayo	48	2,268
Meath	18	1,105
Monaghan	8	330
Offaly	8	368
Roscommon	3	154
Sligo	16	1,090
Tipperary	24	896
Waterford	27	1,572
Westmeath	17	1,176
Wexford	29	1,526
Wicklow	25	1,370
Total	**835**	**57,362**

Appendix K – Methodology

Methodology of Hotel Survey

The panel was constructed to be as representative as possible of the hotel sector by grade and region. During 2012 the panel size fluctuated, with an average of 193 hotels participating in any given month (maximum of 200 and minimum of 181). Each hotel undertook to provide monthly information as to the number of room and bed nights sold. We achieved an annual response rate of 71% of all possible returns (taking into account that some hotels are closed at certain times of the year). The maximum response rate achieved in any given month was 73%, while the minimum response rate achieved was 70%. The current weighting is three dimensional; by month, grade, and region.

The panel results were grossed up to the national hotel room and stock to provide national results. Capacity information has been drawn from the Gulliver System and, more recently, TAMS between January and March. During 2012 capacity information was updated/amended for panel hotels, where anomalies occurred, to make the information as accurate as possible. It was not feasible however to do this for all hotels in the Universe, therefore the majority of capacity information has remained static throughout the year and does not take account of changing capacity. During years of considerable development, this will result in an underestimate for room and bed capacity, with the knock-on effect that the number of rooms and beds sold will be under-estimated. Likewise, during years of considerable hotel closures, this will result in an overestimate for room and bed capacity, with the knock-on effect that the number of rooms and beds sold will be over-estimated. However, as occupancy rates are calculated from complete information collected from the panel, this underestimation or overestimation of capacity should not affect the estimation of occupancy rates.

Fáilte Ireland has attempted to ensure the accuracy of this report, but we cannot accept responsibility for errors or omissions. Where these are brought to our attention, we will amend future publications. There will be margins of error associated with survey results, but this should not interfere with the interpretation of the results. Some caution should be exercised in drawing conclusions on the performance of hotels at sub-sector level.

Other Sources

Fáilte Ireland's survey of holidaymaker attitudes provides feedback on experiences of hotels in Ireland. Over 8,000 holidaymakers, both domestic and overseas, were interviewed during their holiday between May and October 2012, of these more than a third used hotels for accommodation, dining or both.

Definition of Terms

Throughout the report certain terms are used constantly which may necessitate some explanation. These include:

- A Hotel – A premises with a minimum of ten bedrooms, registered in the register of hotels kept by Fáilte Ireland in accordance with the Tourist Traffic Acts 1935-1979.
- A Guestnight or Bednight – Defined as one person staying one night in a hotel. Thus, one person staying three nights in a hotel is counted as three guestnights or bednights.
- Room Capacity – This is the number of rooms declared at the beginning of the year. In assessing occupancy rates, allowance is made for seasonality and varying capacity during the year. Annual capacity can thus be affected by the length of time premises are open during the year.
- Room Occupancy – This refers to the number of rooms occupied in relation to the number of rooms available.
- Bed Capacity – This denotes the capacity declared at the beginning of the year. For capacity purposes, twin beds or double beds are counted as two beds. As mentioned for room capacity, allowance is made for seasonality and varying bed capacity throughout the year.
- Bed Occupancy – This means the number of guestnights taken up in relation to the number of beds available. For example, if a room with a double or twin beds is occupied by one person it has a 50% bed occupancy rate.
- Market Area- This relates to the country where the guest normally resides.

Interpreting the Results

Much of the analysis groups hotels by region or by grade to ensure the accuracy of results. Regions correspond to the Regional Tourism Authority for that area.

Dublin

- Dublin County

East & Midlands

- Kildare;
- Laois;
- Longford;
- Louth;
- Meath;
- Wicklow;
- Offaly (East);
- Westmeath.

South East

- Carlow;
- Kilkenny;
- South Tipperary;
- Waterford;
- Wexford.

South West

- Cork;
- Kerry.

Shannon

- Clare;
- Limerick;
- Tipperary (North);
- Offaly (West).

West

- Galway;
- Mayo;
- Roscommon.

North West

- Cavan;
- Donegal;
- Leitrim;
- Monaghan;
- Sligo.

Classification

A new classification system was introduced in 2008 so direct comparisons with the years 2005-2007 are not advisable.

Location

The location of hotels comprises three categories, according to the 2006 Census:

- Major Metropolitan Areas (MMAs) – population greater than 40,000;
- Other Urban Areas – population between 10,000 and 40,000; and
- Rural – population less than 10,000.