Fáilte Ireland
National Tourism Development Authority

Fáilte Ireland
Hotel Review 2013

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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 2013, and also draws comparisons with recent years. The Review of Hotel Performance in 2013 also presents highlights of the Visitor Attitude Survey 2013 which are pertinent to the hotel industry. A capacity update for 2014 is also included in this report.

The following Summary highlights the key points emerging from the 2013 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 2013, both at their highest levels since 2007.

Capacity and Demand

- In 2014, the number of registered hotels decreased for the fifth consecutive year, decreases in all regions with the exception of Dublin led to an overall drop of 3% nationally.
- Compared with the previous year there was an increase in registered room capacity in Dublin while the West region remained stable, however decreases in all the other regions resulted in a 1% decrease overall.
- The decreases in capacity between 2012 and 2013 across all regions, with the exception of the North West, coupled with an increasing demand, resulted in increasing bed occupancy (44% in 2012 and 45% in 2013) and room occupancy rates (60% in 2012 and 61% in 2013).
- Falling capacity and increasing demand mean that both bed and room occupancy rates are at their highest recorded levels for more than 5 years.

Grade

- Grade 5* hotels experienced the highest average occupancy rates in 2013 maintaining the 66% room occupancy rate achieved in 2012. However, both Grade 3* and 4* properties achieved higher occupancy rates than Grade 5* in June. Grade 3* also outperformed the Grade 5* properties in August and September.
- More than half (57%) 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 three quarters (75%) of bednights in Grade 4* hotels.

Regions

- Demand has outstripped supply in East & Midlands, Shannon and the North West resulting in an increase in room occupancy rates in all three regions. The increases in room occupancy in these regions mean that they are all at their highest recorded occupancy levels since 2008.
- Although the overseas market only accounts for 30% of total bednights sold, more than two fifths (46%) of all bednights sold in Dublin in 2013 were attributable to overseas visitors.
- The domestic market is very important in the South East where it accounted for more than four fifths (81%) of all bednights sold. Northern Ireland is also very important to the North West where it accounts for more than a fifth (22%) of all bednight sales.

Hotel Size

- The large hotels experienced a very slight (less than 1%) decrease in bed capacity; however, demand increased slightly resulting in an overall increase of 1 percentage point in the occupancy rate for 2013.
- All other size category of hotels also experienced a 1 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 40% of all hotel nights in Major Metropolitan Areas (MMAs). In Other Urban and Rural locations just over one fifth (21% and 22% respectively) of guest nights are attributable to overseas visitors.

Markets

- Overall guestnight demand increased by 2% in 2013.
- The increase in demand in 2013 was mainly due to the increases across all markets with the exception of Britain (no change) and the North American markets (-6%).
- Overseas guest nights slightly increased in 2013, maintaining the level of 30% achieved in 2012.
- The number of domestic guest nights increased marginally in 2013 resulting in no movement in overall market share. Consistent with the 2012 results, domestic visitors still account for almost two thirds (65%) of all guest nights.

1 Capacity and Demand

Table 1.1 Number of Registered Hotels

	2009	2010	2011	2012	2013	2014	Growth Rate 2014 vs 2013
Dublin	160	159	157	154	151	151	nc
East & Midlands	130	124	119	114	113	106	-6
South East	112	111	105	104	99	96	-3
South West	166	163	161	157	153	151	-1
Shannon	92	90	88	83	81	78	-4
West	148	145	141	137	134	129	-4
North West	107	110	112	107	104	100	-4
	915	**902**	**883**	**856**	**835**	**811**	**-3**

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

	2009	2010	2011	2012	2013	2014	Growth Rate 2014 vs 2013
Dublin	19.1	19.2	18.9	18.6	18.5	18.7	+1
East & Midlands	7.1	6.9	6.8	6.5	6.4	6.2	-3
South East	5.6	5.6	5.4	5.4	5.3	5.2	-2
South West	10.4	10.3	10.1	9.9	9.7	9.6	-1
Shannon	5.4	5.4	5.3	5.1	5.0	4.9	-2
West	7.1	7.3	7.2	7.0	6.9	6.9	nc
North West	5.3	5.5	5.6	5.4	5.5	5.3	-4
	60.1	**60.2**	**59.3**	**57.9**	**57.4**	**56.7**	**-1**

Table 1.3 Average Hotel Occupancy Rates (%)

	2008	2009	2010	2011	2012	2013
Bed Occupancy	43	42	41	41	44	45
Room Occupancy	58	56	56	56	60	61

Table 1.4 Bednights (000's)

	2008	2009	2010	2011	2012	2013
Bednights Capacity	48,227	50,273	50,056	50,180	48,393	47,982
Bednights Sold	20,554	20,949	20,433	20,824	21,346	21,708
Bed Occupancy (%)	43	42	41	41	44	45

Table 1.5 Roomnights (000's)

	2008	2009	2010	2011	2012	2013
Roomnights Capacity	21,019	21,276	21,160	21,269	20,650	20,482
Roomnights Sold	12,294	11,978	11,785	11,997	12,356	12,433
Room Occupancy (%)	58	56	56	56	60	61

- In 2014, the number of registered hotels decreased for the fifth consecutive year, decreases in all regions with the exception of Dublin led to an overall drop of 3% nationally.
- Compared with the previous year there was an increase in registered room capacity in Dublin while the West region remained stable, however decreases in all the other regions resulted in a 1% decrease overall.
- Registered room capacity has declined at national level for the second consecutive year.
- The decreases in capacity between 2012 and 2013 across all regions, with the exception of the North West, coupled with an increasing demand, resulted in increasing bed occupancy (44% in 2012 and 45% in 2013) and room occupancy rates (60% in 2012 and 61% in 2013).
- Falling capacity and increasing demand mean that both bed and room occupancy rates are at their highest recorded levels for more than 5 years.
- Average room occupancy reached over 80% in August, the highest monthly room occupancy rate since 2008. Over two thirds (67%) of hotel beds were occupied in the same month.

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
2013	2,995	20,764	21,775	2,448
Year on Year Change (%)	-3%	-1%	nc	-3%
Bed Nights Sold				
2012	1,561	9,224	9,725	822
2013	1,502	9,297	10,045	865
Year on Year Change (%)	-4%	+1%	+3%	+5%
Room Capacity				
2012	1,359	9,061	9,079	1,136
2013	1,315	8,999	9,061	1,107
Year on Year Change (%)	-3%	-1%	nc	-3%
Room Nights Sold				
2012	901	5,305	5,616	524
2013	862	5,397	5,635	538
Year on Year Change (%)	-4%	+2%	nc	+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 2013 (%)

	5*	4*	3*	2* & 1*
Britain	11	7	9	13
Mainland Europe	9	7	14	16
North America	31	6	7	6
Rest of World	6	2	6	4
Total Overseas	**57**	**21**	**35**	**39**
Northern Ireland	2	4	5	8
Republic of Ireland	41	75	60	54
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 2013 (%)

	All	5*	4*	3*	2*&1*
Jan-Mar	49	59	50	48	41
April	57	60	56	59	41
May	64	68	61	68	50
June	71	68	70	76	47
July	72	75	73	74	59
August	81	81	79	83	66
September	70	70	65	76	59
Oct-Dec	54	61	54	54	44
Total	**61**	**66**	**60**	**62**	**49**

Table 2.4 Room Occupancy – By Grade (%)

	2011	2012	2013
Grade 5*	63	66	66
Grade 4*	57	59	60
Grade 3*	57	62	62
Grade 1* and 2*	42	46	49
Total	**56**	**60**	**61**

- Grade 5* hotels experienced the highest average room occupancy rates in 2013 maintaining the 66% room occupancy rate achieved in 2012. However, both Grade 3* and 4* properties achieved higher occupancy rates than Grade 5* in June. Grade 3* also outperformed the Grade 5* properties in August and September.
- Grade 1* and 2* hotels performed poorly only achieving 49% occupancy in 2013; however, this was a 3 percentage point increase on the occupancy rate recorded for 2012.
- There was a slight increase in Grade 4* hotel room occupancy rates, however, there was no change for Grade 3* hotels.
- More than half (57%) 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 three quarters (75%) 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
2013	15,782	5,540	4,530	8,007	4,054	5,740	4,330
Year on Year Change	*nc*	*-1%*	*-1%*	*-2%*	*-2%*	*-1%*	*-1%*
Bed Nights Sold							
2012	7,603	1,870	2,013	3,867	1,542	2,648	1,802
2013	7,582	1,867	2,061	3,862	1,658	2,765	1,913
Year on Year Change	*nc*	*nc*	*+2%*	*nc*	*+8%*	*+4%*	*+6%*
Room Capacity							
2012	6,772	2,352	1,921	3,421	1,786	2,451	1,948
2013	6,767	2,333	1,901	3,354	1,750	2,448	1,931
Year on Year Change	*nc*	*-1%*	*-1%*	*-2%*	*-2%*	*nc*	*-1%*
Room Nights Sold							
2012	4,684	1,055	1,106	2,074	885	1,520	1,031
2013	4,659	1,090	1,107	2,003	963	1,514	1,098
Year on Year Change	*-1%*	*+3%*	*nc*	*-3%*	*+9%*	*nc*	*+6%*

Table 3.2 Room Occupancy – by Region 2013 (%)

	Total	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Year	**61**	**69**	**47**	**58**	**60**	**55**	**62**	**57**
Jan-Mar	49	58	39	43	47	42	49	47
April	57	68	49	55	51	49	55	51
May	64	73	50	65	65	54	63	57
June	71	78	50	70	76	66	77	63
July	72	77	54	76	79	67	73	68
August	81	82	64	84	84	75	90	80
September	70	79	48	67	65	72	78	63
Oct-Dec	54	65	42	50	48	48	51	52

Table 3.3 Distribution of Regional Guest Nights by Market Area 2013 (%)

	Total	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Britain	8	12	8	6	6	6	4	10
Mainland Europe	10	17	3	3	8	12	6	7
North America	8	10	4	6	8	6	9	6
Rest of World	4	7	2	2	2	1	4	1
Total Overseas	**30**	**46**	**16**	**17**	**25**	**25**	**23**	**24**
Northern Ireland	5	3	9	1	3	1	2	22
Republic of Ireland	65	52	75	81	72	74	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 (%)

	2008	2009	2010	2011	2012	2013
Dublin	66	63	62	64	69	69
East & Midlands	46	40	42	40	45	47
South East	56	58	57	55	58	58
South West	58	61	58	60	61	60
Shannon	58	51	51	51	50	55
West	59	57	56	57	62	62
North West	51	47	50	48	53	57

- Demand has outstripped supply in East & Midlands, Shannon and the North West resulting in an increase in room occupancy rates in all three regions.
- Room occupancy rates in Shannon increased significantly to 55% from 50%, the highest room occupancy rate since 2008.
- East & Midlands and the North West regions also experienced increases in room occupancy. The increases in room occupancy in these regions mean that they are at their highest recorded occupancy levels since 2008.
- Hotels in the West achieved a room occupancy rate of 90% and bed occupancy of 79% in August 2013.
- Although the overseas market only accounts for 30% of total bednights sold, more than two fifths (46%) of all bednights sold in Dublin were attributable to overseas visitors.
- Visitors from Northern Ireland accounted for between 1% and 9% of bednights sold in all regions, with the exception of the North West, where more than a fifth (22%) of total bednight sales are attributable to this market.
- The domestic market accounted for more than four fifths (81%) of all bednights sold in the South East region. Dublin and the North West are the least dependent regions on the domestic market with around half (52% 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
2013	2,023	6,084	13,490	26,386
Year on Year Change	*-9%*	*-2%*	*nc*	*nc*
Bed Nights Sold				
2012	781	2,607	5,959	11,999
2013	764	2,666	6,182	12,097
Year on Year Change	*-2%*	*+2%*	*+4%*	*+1%*
Room Capacity				
2012	1,009	2,647	5,736	11,259
2013	923	2,597	5,716	11,247
Year on Year Change	*-9%*	*-2%*	*nc*	*nc*
Room Nights Sold				
2012	481	1,497	3,359	7,018
2013	456	1,497	3,434	7,046
Year on Year Change	*-5%*	*nc*	*+2%*	*nc*

Table 4.2 Room Occupancy – by Hotel Size 2013 (%)

	Total	1 - 20 Rooms	21 – 49 Rooms	50 – 99 Rooms	100+ Rooms
Year	**61**	**49**	**58**	**60**	**63**
Jan – Mar	49	40	45	48	51
April	57	41	53	56	60
May	64	50	61	64	66
June	71	53	68	72	73
July	72	61	70	73	74
August	81	70	79	83	81
September	70	60	68	69	72
Oct – Dec	54	42	50	52	57

Table 4.3 Distribution of Guest Nights by Market Area, by Hotel Size 2013 (%)

	Total	1 - 20 Rooms	21 – 49 Rooms	50 – 99 Rooms	100+ Rooms
Britain	8	8	8	7	9
Mainland Europe	10	8	10	8	12
North America	8	5	7	8	8
Rest of World	4	3	3	3	4
Total Overseas	**30**	**24**	**28**	**27**	**33**
Northern Ireland	5	7	7	5	4
Republic of Ireland	65	69	65	68	63
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

	2008	2009	2010	2011	2012	2013
1 - 20 Rooms	46	43	45	44	48	49
21 – 49 Rooms	55	53	53	53	57	58
50 – 99 Rooms	58	55	55	55	59	60
100+ Rooms	61	59	57	59	62	63

- Demand for rooms in hotels with 1-20 rooms decreased by 5%, however, supply actually decreased by 9%. This resulted in a 1 percentage point increase in occupancy rates for hotels with 1-20 rooms.
- There was no change in demand for rooms in hotels with 21-49 rooms although supply decreased by 2%. This resulted in a 1 percentage point increase in occupancy rates for hotels with 21-49 rooms.
- Demand for rooms in hotels with 50-99 rooms increased by 2%, however, there was no change in supply. This also resulted in a 1 percentage point increase in occupancy rates for hotels with 50-99 rooms.
- Large hotels experienced a very slight (less than 1%) decrease in capacity; however, demand increased slightly resulting in an overall increase of 1 percentage points in occupancy rates for large hotels (100+ rooms) in 2013.
- 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
2013	22,461	8,159	17,362
Year on Year Change	*nc*	*-1%*	*-1%*
Bed Nights Sold			
2012	10,577	3,461	7,309
2013	10,675	3,507	7,525
Year on Year Change	*+1%*	*+1%*	*+3%*
Room Capacity			
2012	9,672	3,384	7,595
2013	9,621	3,346	7,515
Year on Year Change	*-1%*	*-1%*	*-1%*
Room Nights Sold			
2012	6,359	1,855	4,142
2013	6,361	1,853	4,219
Year on Year Change	*nc*	*nc*	*+2%*

Table 5.2 Room Occupancy – by Location 2013 (%)

	Total	MMA	Other Urban	Rural
Year	**61**	**66**	**55**	**56**
Jan – Mar	49	54	44	44
April	57	64	51	51
May	64	70	60	58
June	71	77	67	66
July	72	76	69	69
August	81	83	77	79
September	70	77	61	65
Oct – Dec	54	61	47	49

Table 5.3 Distribution of Guest Nights by Market Area, by Location 2013 (%)

	All	MMA	Other Urban	Rural
Britain	8	10	7	7
Mainland Europe	10	14	7	6
North America	8	10	6	7
Rest of World	4	6	2	2
Total Overseas	**30**	**40**	**21**	**22**
Northern Ireland	5	2	6	8
Republic of Ireland	65	58	74	70
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

	2008	2009	2010	2011	2012	2013
MMA	64	61	60	62	66	66
Other Urban	55	53	52	52	55	55
Rural	54	52	52	51	55	56

- Rural areas experienced increased demand (+2%), coupled with a decrease (-1%) in the supply of rooms which has resulted in an overall increase of 1 percentage point in room occupancy.
- Major Metropolitan Areas (MMAs) and hotels in Other Urban areas experienced no change in demand, coupled with a slight decrease (-1%) in the supply of rooms which has resulted in no change overall.
- Overseas visitors accounted for 40% of all hotel nights in Major Metropolitan Areas (MMAs). In Other Urban and Rural locations just over one fifth (21% and 22% respectively) of guest nights are attributable to overseas visitors.

6 Markets

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

	2008	2009	2010	2011	2012	2013	% Change 2013/2012
Britain	2,753	2,238	2,184	1,987	1,807	1,805	nc
Mainland Europe	1,568	2,151	1,990	2,084	2,221	2,248	+1
North America	1,424	1,569	1,468	1,337	1,861	1,747	-6
Rest of World	679	590	516	530	585	820	+40
Total Overseas	**6,424**	**6,549**	**6,159**	**5,939**	**6,473**	**6,620**	**+2**
Northern Ireland	782	863	961	899	956	1,018	+6
Republic of Ireland	13,348	13,537	13,314	13,986	13,917	14,070	+1
Total	**20,554**	**20,949**	**20,433**	**20,824**	**21,346**	**21,708**	**+2**

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

	2008	2009	2010	2011	2012	2013
Britain	13	11	11	10	8	8
Mainland Europe	8	10	10	10	10	10
North America	7	7	7	6	9	8
Rest of World	3	3	3	3	3	4
Total Overseas	**31**	**31**	**30**	**29**	**30**	**30**
Northern Ireland	4	4	5	4	4	5
Republic of Ireland	65	65	65	67	65	65

Table 6.3 Distribution of Market Guest Nights (%) 2013

	Jan - Mar	April	May	June	July	Aug	Sept	Oct - Dec
Britain	8	10	9	8	7	8	8	8
Mainland Europe	9	13	12	13	12	12	10	6
North America	5	6	10	12	10	8	11	6
Rest of World	2	2	3	3	4	5	5	5
Total Overseas	**25**	**31**	**35**	**36**	**33**	**33**	**34**	**26**
Northern Ireland	5	5	4	4	5	5	4	4
Republic of Ireland	70	64	61	60	61	62	62	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 2% in 2013.
- The increase in demand in 2013 was mainly due to the increases across all markets with the exception of Britain (no change) and the North American markets (-6%).
- The 2% increase in the overseas market was generated by a slight increase in demand from Mainland Europe (+1%) and a significant increase in demand from the Rest of the World market (40% - on a small base).
- The overseas share of guest nights has remained consistent at 30% in 2013.
- The number of domestic guest nights increased marginally in 2013 resulting in no movement in overall market share. Consistent with the 2012 results, domestic visitors still account for almost two thirds (65%) of all guest nights.

7 Holidaymakers' Attitudes to Hotels

Chart 7.1 Rating of Hotels on Aspects of the Dining Experience

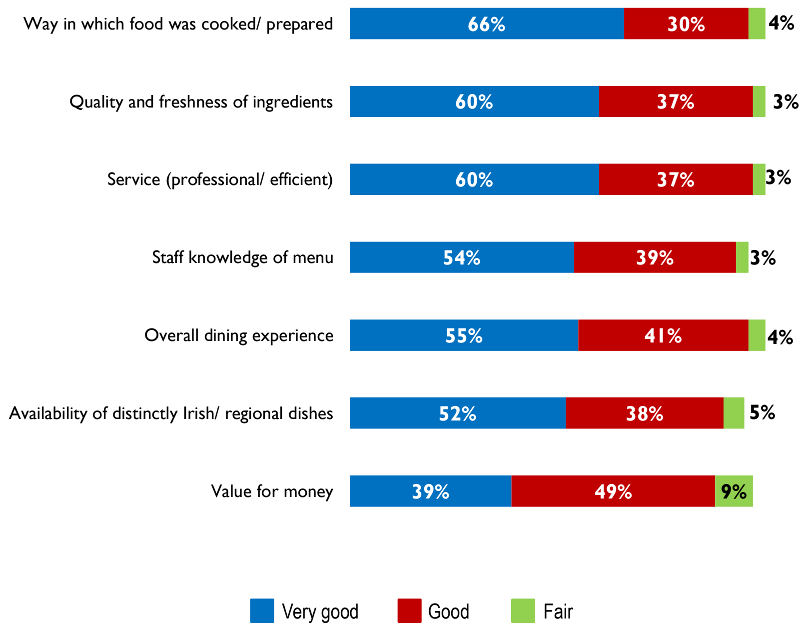

Chart 7.2 Rating of Hotels on Aspects of the Accommodation Experience

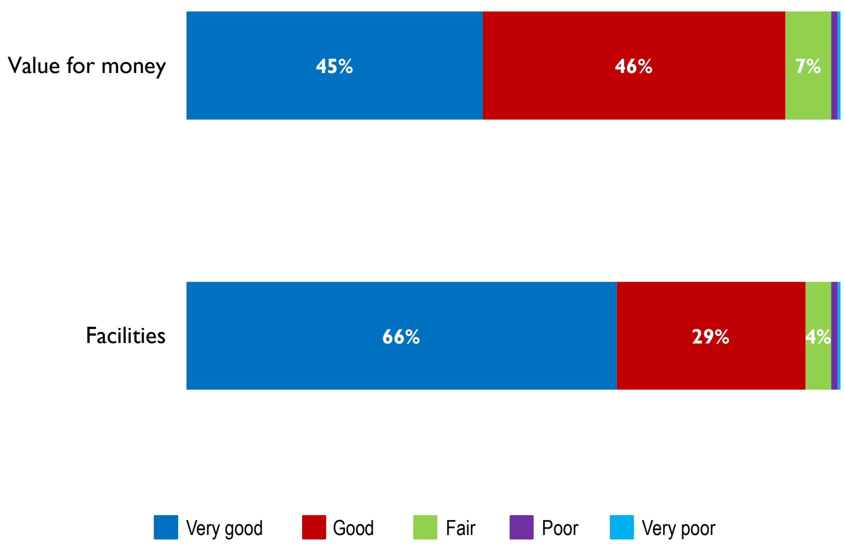

Chart 7.3 Areas for Improvement in the Hotel Accommodation Experience

Top five areas for improvement suggested by those giving a fair rating (4% or 163 respondents)	
1	Better equipped bedrooms
2.	Maintenance of bedrooms
3	Better hygiene/cleanliness
4	Faster service
5	More helpful staff

Chart 7.4 Areas for Improvement in the Hotel Accommodation Experience

Top five reasons for giving poor rating (1% or 28 respondents)	
1	Poorly maintained property
2.	Poorly equipped rooms
3	Not enough hygiene/cleanliness
4	Staff not helpful
5	Slow service

- Almost 10,000 overseas and domestic holidaymakers were interviewed about their holiday experience during the summer of 2013. Holidaymakers were interviewed in the course of their holiday in locations around Ireland.
- Almost one third of those interviewed (32%) had eaten in a hotel. They rated their dining experiences in hotels very highly. More than 90% rated most aspects of the experience they enjoyed as very good or good.
- A slightly lower proportion, 88%, said that the value for money of their hotel dining experience was good or very good.
- About two in five (39%) 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 95% of respondents.
- Those rating facilities "fair" (4% or 163 holidaymakers) suggested that improvements in bedroom facilities and maintenance, hygiene and service would have enhanced their hotel experience.
- The minority of respondents (1% or 28 holidaymakers interviewed) who complained of poor hotel facilities again referred to issues such as poorly equipped bedrooms, poorly maintained properties, hygiene, and staff issues.

APPENDICES

Appendix A – Capacity

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

	2009	2010	2011	2012	2013	2014	Growth Rate 2014 vs 2013 (%)
Dublin	41.1	44.9	43.8	43.2	43.0	41.4	-4
East and Midlands	15.6	16.3	15.9	15.3	15.1	14.4	-5
South East	12.3	13.6	13.1	12.8	12.7	12.4	-2
South West	22.7	24.6	24.1	23.2	22.6	22.0	-3
Shannon	11.6	12.6	12.5	11.9	11.7	11.4	-3
West	15.7	17.4	17.5	16.4	16.3	16.7	+2
North West	11.5	12.7	12.9	12.2	12.1	12.7	+5
Total	**130.3**	**142.1**	**139.9**	**135.0**	**133.5**	**130.9**	**-2**

Table 1.2 Registered Hotel Premises – By Grade

	2009	2010	2011	2012	2013	2014
Grade 5*	32	34	34	35	34	35
Grade 4*	246	269	267	271	272	277
Grade 3*	407	398	391	376	366	349
Grade 2*	168	160	152	141	131	122
Grade 1*	43	36	34	30	32	28
Total	**915**	**902**	**883**	**856**	**835**	**811**

Table 1.3 Hotel Beds and Rooms by Grade 2014

	Rooms	Beds
Grade 5*	3,969	8,201
Grade 4*	25,890	58,743
Grade 3*	24,045	57,657
Grade 2*	2,467	5,430
Grade 1*	365	844
Total	**56,736**	**130,875**

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

Appendix B – Demand

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

	2008	2009	2010	2011	2012	2013
January – March	4,001	3,914	3,724	3,704	3,945	4,108
April	1,617	1,688	1,667	1,835	1,792	1,690
May	1,937	1,882	1,816	1,829	1,979	1,947
June	1,928	1,959	2,013	2,070	2,150	2,128
July	2,308	2,348	2,310	2,437	2,416	2,439
August	2,450	2,693	2,541	2,585	2,644	2,802
September	1,885	1,965	2,021	2,016	2,091	2,037
October – December	4,427	4,501	4,341	4,350	4,330	4,558
Total	**20,554**	**20,949**	**20,433**	**20,824**	**21,346**	**21,708**

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

	2008	2009	2010	2011	2012	2013
January – March	2,462	2,321	2,230	2,235	2,360	2,406
April	1,021	942	966	1,021	1,015	981
May	1,146	1,109	1,081	1,108	1,180	1,145
June	1,158	1,135	1,137	1,184	1,244	1,234
July	1,302	1,294	1,258	1,330	1,295	1,299
August	1,356	1,396	1,352	1,368	1,404	1,442
September	1,172	1,159	1,206	1,185	1,256	1,209
October – December	2,677	2,624	2,553	2,566	2,603	2,718
Total	**12,294**	**11,978**	**11,785**	**11,997**	**12,356**	**12,433**

Table 2.3 Monthly Room Occupancy Rates (%)

	2008	2009	2010	2011	2012	2013
January	43	40	36	37	37	39
February	48	47	46	47	49	49
March	53	48	50	48	55	58
April	58	53	54	57	59	57
May	63	60	59	60	66	64
June	65	63	63	66	71	71
July	71	70	68	72	72	72
August	74	75	73	74	78	81
September	66	64	67	66	72	70
October	61	60	60	56	60	63
November	49	46	46	47	50	54
December	46	45	42	42	44	45
Total	**58**	**56**	**56**	**56**	**60**	**61**

Table 2.4 Monthly Bed Occupancy Rates (%)

	2008	2009	2010	2011	2012	2013
January	29	28	24	25	26	27
February	34	33	32	33	35	36
March	39	35	36	34	40	44
April	40	40	40	44	44	42
May	46	43	42	42	47	46
June	47	46	47	49	53	52
July	55	54	53	56	57	58
August	58	61	58	59	63	67
September	46	46	48	48	51	50
October	43	45	45	40	42	46
November	34	32	31	34	35	37
December	36	33	30	30	31	33
Total	**43**	**42**	**41**	**41**	**44**	**45**

Appendix C - Grade

Table 3.1 Bed Occupancy – By Grade 2013 (%)

	All	Grade 5*	Grade 4*	Grade 3*	Grade 2* and 1*
Jan – Mar	36	43	36	35	30
April	42	44	42	43	30
May	46	50	45	48	39
June	52	53	52	55	33
July	58	61	58	60	43
August	67	66	67	69	52
September	50	55	48	53	41
Oct – Dec	39	46	38	39	31
Total	**45**	**50**	**45**	**46**	**35**

Table 3.2 Distribution of Market Guestnights by Grade 2013 (%)

	Grade 5*	Grade 4*	Grade 3*	Grade 2* and 1*	Total
Britain	9	35	49	6	**100**
Mainland Europe	7	31	56	6	**100**
North America	27	31	39	3	**100**
Rest of World	11	18	67	4	**100**
Northern Ireland	4	37	52	6	**100**
Republic of Ireland	4	50	43	3	**100**

Table 3.3 Room Occupancy – By Grade (%)

	2011	2012	2013
Grade 5*	63	66	66
Grade 4*	57	59	60
Grade 3*	57	62	62
Grade 1* & 2*	42	46	49
Total	**56**	**60**	**61**

Table 3.4 Bed Occupancy – By Grade (%)

	2011	2012	2013
Grade 5*	45	51	50
Grade 4*	41	44	45
Grade 3*	43	45	46
Grade 1* & 2*	29	33	35
Total	**41**	**44**	**45**

Appendix D – Regions

Table 4.1 Room Occupancy – By Region (%)

	2008	2009	2010	2011	2012	2013
Dublin	66	63	62	64	69	69
East and Midlands	46	40	42	40	45	47
South East	56	58	57	55	58	58
South West	58	61	58	60	61	60
Shannon	58	51	51	51	50	55
West	59	57	56	57	62	62
North West	51	47	50	48	53	57
Total	**58**	**56**	**56**	**56**	**60**	**61**

Table 4.2 Bed Occupancy – By Region (%)

	2008	2009	2010	2011	2012	2013
Dublin	47	46	44	46	48	48
East and Midlands	31	28	27	27	33	34
South East	42	42	42	40	44	45
South West	41	47	46	49	47	48
Shannon	42	37	38	38	37	41
West	48	42	41	42	46	48
North West	37	37	40	37	41	44
Total	**43**	**42**	**41**	**41**	**44**	**45**

Table 4.3 Bed Occupancy – By Region 2013 (%)

	Total	Dublin	East and Midlands	South East	South West	Shannon	West	North West
Year	**45**	**48**	**34**	**45**	**48**	**41**	**48**	**44**
Jan – Mar	36	40	28	34	36	31	37	36
April	42	47	34	41	42	36	43	40
May	46	50	35	49	50	40	48	43
June	52	53	36	54	61	50	58	48
July	58	57	41	64	70	53	60	56
August	67	64	51	69	75	62	79	68
September	50	53	34	52	51	50	58	46
Oct – Dec	39	44	30	37	37	34	38	40

Appendix E – Grade within Region

Table 5.1 Bed Occupancy Rates – Grade within Region 2013 (%)

	Total	Grade 4* and 5*	Grade 3*	Grade 2* and 1*
Dublin	48	44	52	52
East & Midlands	34	32	39	24
South East	45	51	39	41
South West	48	51	46	27
Shannon	41	50	37	25
West	48	51	48	32
North West	44	46	46	20

Table 5.2 Room Occupancy Rates – Grade within Region 2013 (%)

	Total	Grade 4* and 5*	Grade 3*	Grade 2* and 1*
Dublin	69	61	77	75
East & Midlands	47	46	51	26
South East	58	64	52	51
South West	60	65	55	38
Shannon	55	63	52	38
West	62	65	61	41
North West	57	61	58	28

Appendix F – Hotel Size

Table 6.1 Room Occupancy – By Hotel Size (%)

	2008	2009	2010	2011	2012	2013
1-20 Rooms	46	43	45	44	48	49
21-49 Rooms	55	53	53	53	57	58
50-99 Rooms	58	55	55	55	59	60
100+ Rooms	61	59	57	59	62	63
Total	**58**	**56**	**56**	**56**	**60**	**61**

Table 6.2 Bed Occupancy – By Hotel Size (%)

	2008	2009	2010	2011	2012	2013
1-20 Rooms	33	31	33	32	35	38
21-49 Rooms	40	39	39	39	42	44
50-99 Rooms	43	41	41	41	44	46
100+ Rooms	44	44	42	43	45	46
Total	**43**	**42**	**41**	**41**	**44**	**45**

Table 6.3 Bed Occupancy – By Hotel Size 2013 (%)

	Total	1-20 Rooms	21-49 Rooms	50-99 Rooms	100+ Rooms
Jan – March	36	30	33	36	37
April	42	32	40	42	43
May	46	38	46	47	47
June	52	40	51	54	53
July	58	49	57	60	58
August	67	58	67	69	66
September	50	44	49	50	51
Oct – Dec	39	31	36	38	40
Total	**45**	**38**	**44**	**46**	**46**

Table 6.4 Distribution of Guestnights by Market Area by Hotel Size 2013 (%)

	1-20 Rooms	21-49 Rooms	50-99 Rooms	100+ Rooms
Britain	8	8	7	9
Mainland Europe	8	10	8	12
North America	5	7	8	8
Rest of World	3	3	3	4
Northern Ireland	7	7	5	4
Republic of Ireland	69	65	68	63
Total	**100**	**100**	**100**	**100**

Appendix G – Location

Table 7.1 Room Occupancy – By Location (%)

	2008	2009	2010	2011	2012	2013
MMA	64	61	60	62	66	66
Other Urban	55	53	52	52	55	55
Rural	54	52	52	51	55	56
Total	**58**	**56**	**56**	**56**	**60**	**61**

Table 7.2 Bed Occupancy – By Location (%)

	2008	2009	2010	2011	2012	2013
MMA	46	45	43	45	47	48
Other Urban	39	40	39	40	42	43
Rural	40	39	39	38	41	43
Total	**43**	**42**	**41**	**41**	**44**	**45**

Table 7.3 Bed Occupancy – By Location 2013 (%)

	MMA	Other Urban	Rural
January – March	38	33	33
April	45	39	39
May	49	45	44
June	54	52	50
July	59	59	57
August	67	67	67
September	53	46	48
October – December	42	35	36
Total	**48**	**43**	**43**

Appendix H – Markets

Table 8.1 Seasonality of Guestnights within Market Area 2013 (%)

	Jan-Mar	April	May	June	July	Aug	Sept	Oct-Dec	Total
Britain	19	9	10	9	10	13	9	21	**100**
Mainland Europe	17	10	11	12	14	15	9	13	**100**
North America	13	6	11	14	14	13	13	17	**100**
Rest of World	10	5	7	8	13	16	11	29	**100**
Northern Ireland	22	8	9	9	12	13	7	20	**100**
Republic of Ireland	20	8	8	9	11	12	9	23	**100**

Appendix I – Hotel Stock by Region 2014

Table 9.1 Dublin

	Premises	Rooms	Beds
Grade 5*	10	1,681	3,421
Grade 4*	47	8,260	17,616
Grade 3*	69	7,995	18,665
Grade 2*	21	700	1,518
Grade 1*	4	82	175
Total	**151**	**18,718**	**41,395**

Table 9.2 East and Midlands

	Premises	Rooms	Beds
Grade 5*	5	527	1,090
Grade 4*	37	3,388	7,767
Grade 3*	45	1,948	4,765
Grade 2*	17	303	676
Grade 1*	2	24	58
Total	**106**	**6,190**	**14,356**

Table 9.3 South East

	Premises	Rooms	Beds
Grade 5*	3	248	559
Grade 4*	37	2,562	6,255
Grade 3*	38	2,091	5,053
Grade 2*	13	197	409
Grade 1*	5	68	146
Total	**96**	**5,166**	**12,422**

Table 9.4 South West

	Premises	Rooms	Beds
Grade 5*	10	929	1,895
Grade 4*	57	4,529	10,298
Grade 3*	61	3,769	9,014
Grade 2*	18	302	689
Grade 1*	5	50	102
Total	**151**	**9,579**	**21,998**

Table 9.5 Shannon

	Premises	Rooms	Beds
Grade 5*	3	255	572
Grade 4*	23	1,511	3,674
Grade 3*	38	2,784	6,414
Grade 2*	12	294	626
Grade 1*	2	22	70
Total	**78**	**4,866**	**11,356**

Table 9.6 West

	Premises	Rooms	Beds
Grade 5*	3	233	472
Grade 4*	43	3,065	7,101
Grade 3*	55	3,152	8,096
Grade 2*	22	356	833
Grade 1*	6	74	179
Total	**129**	**6,880**	**16,681**

Table 9.7 North West

	Premises	Rooms	Beds
Grade 5*	1	96	192
Grade 4*	33	2,575	6,032
Grade 3*	43	2,306	5,650
Grade 2*	19	315	679
Grade 1*	4	45	114
Total	**100**	**5,337**	**12,667**

Appendix J – Hotel Stock by County 2014

Table 10.1 Hotel Stock by County 2014

County	Premises	Rooms
Carlow	10	532
Cavan	16	803
Clare	39	2,245
Cork	76	4,318
Donegal	54	2,885
Dublin	151	18,718
Galway	80	4,499
Kerry	75	5,261
Kildare	22	1,144
Kilkenny	16	1,131
Laois	10	519
Leitrim	7	269
Limerick	28	2,144
Longford	1	11
Louth	11	691
Mayo	45	2,217
Meath	17	1,098
Monaghan	8	328
Offaly	8	356
Roscommon	4	164
Sligo	15	1,052
Tipperary	23	866
Waterford	26	1,534
Westmeath	17	1,130
Wexford	28	1,442
Wicklow	24	1,379
Total	**811**	**56,736**

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 2013 the panel size fluctuated, with an average of 188 hotels participating in any given month (maximum of 198 and minimum of 175). Each hotel undertook to provide monthly information as to the number of room and bed nights sold. We achieved an annual response rate of 76% 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 80%, 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 2013 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. Almost 10,000 holidaymakers, both domestic and overseas, were interviewed during their holiday between May and October 2013, of these between 30% and 40% 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.