Accommodation Occupancy Survey

Strategic Research and Insight

August to December 2021

Summary and Background

Aug – Dec 2021 | Occupancy Survey

Summary

Very varied performance by sector August – December 2021 (last 5 months of 2021)

- **Self-catering** performed very well during August – December 2021, with occupancy exceeding pre-pandemic (2019) levels in every month
  - Average self-catering bed occupancy was 49% (well up on 36%, seen in the same period in 2019)
- **B&Bs** (35% bed occupancy) experienced similar levels to 2019 (34%)
- **Guesthouse and hostel** occupancy levels August – December 2021 were both well down on 2019
  - Average **guesthouse** bed occupancy was 49% (60% in 2019)
  - Average **hostel** bed occupancy was 43% (68% in 2019)

Performance depended on success in attracting domestic market

- During a period of possible but awkward international travel, most guests in each sector were domestic
- Self-catering sector, normally more reliant on international guests, adapted very effectively attracting the domestic market

Background

What is the accommodation occupancy survey?

- Strategic Research and Insight (SRI) operates a monthly survey with (non-hotel) accommodation operators
- Data on room/unit occupancy, bed occupancy and split by domestic / international guests is gathered on an ongoing basis online and by telephone
- Table below shows number of monthly data forms completed by sector during Aug – Dec 2021:

Sector / Month	Population	Aug sample			Sep sample			Oct sample			Nov sample			Dec sample		
		Open	Closed	Total	Open	Closed	Total	Open	Closed	Total	Open	Closed	Total	Open	Closed	Total
Guesthouses	138	27	2	29	29	1	30	26	17	43	15	23	38	10	23	33
B&Bs	916	92	10	102	132	17	149	119	165	284	67	203	270	53	219	272
Self-catering	525	154	8	162	125	11	136	122	37	159	75	64	139	61	70	131
Caravan & campsites	130	19	0	19	14	1	15	5	8	13	2	15	17	0	17	17
Hostels	98	13	31	44	14	2	16	15	31	46	13	32	45	13	31	44

Individual Sectors

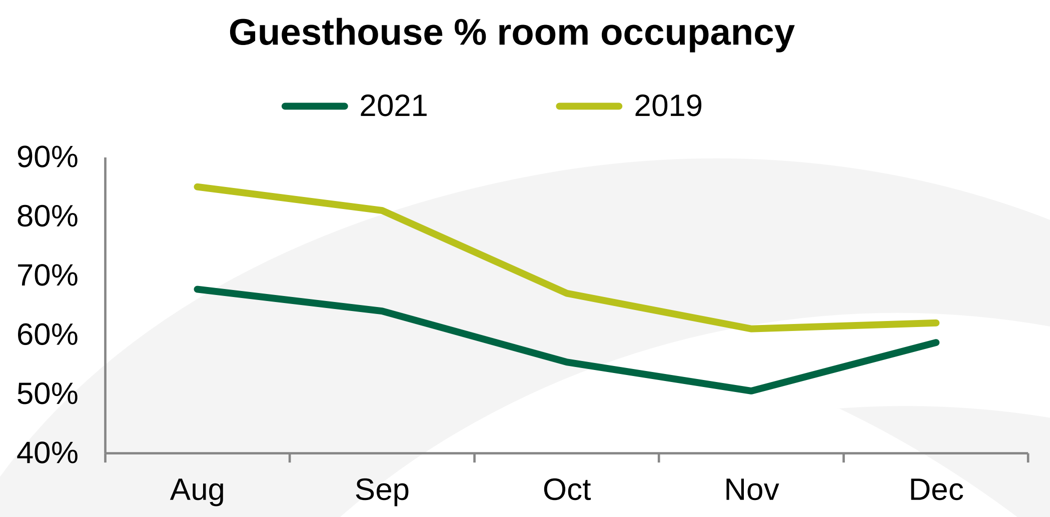
Aug – Dec 2021 | Occupancy Survey

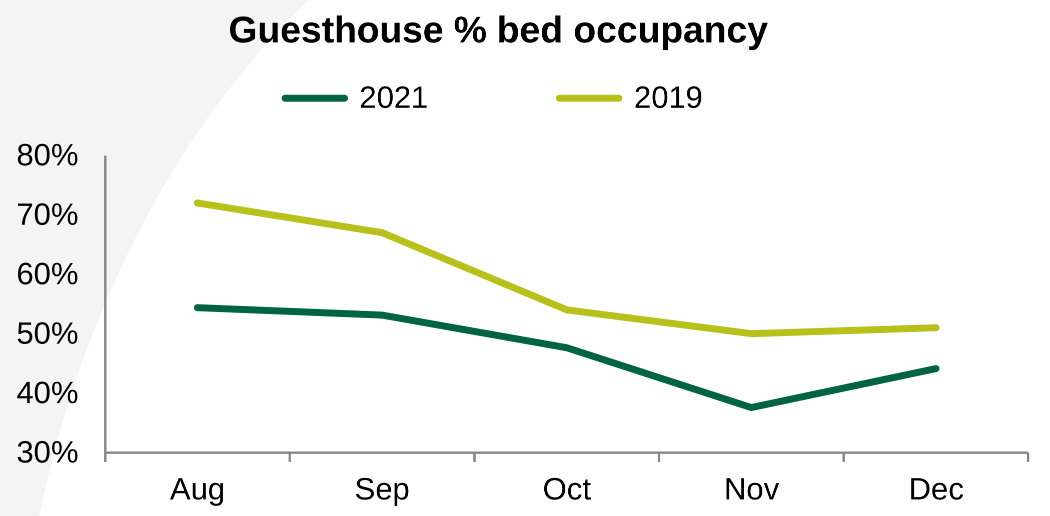
Guesthouses (1)

Occupancy well below ‘normal’ pre-pandemic year

- August occupancy levels were well below the same month in 2019, the most recent pre-pandemic year:
    - 68% room occupancy in August 2021 vs 85% in 2019
    - 54% bed occupancy in August 2021 vs 72% in 2019
- Trend continued to the end of the year (not many were open in December as lockdown measures tightened again)
- Overall average room occupancy August – December was 61% (72% in 2019)
- Overall average bed occupancy August – December was 49% (60% in 2019)

Some sectors, discussed next, do not follow same 2021 vs 2019 trend as guesthouses





Guesthouses (2)

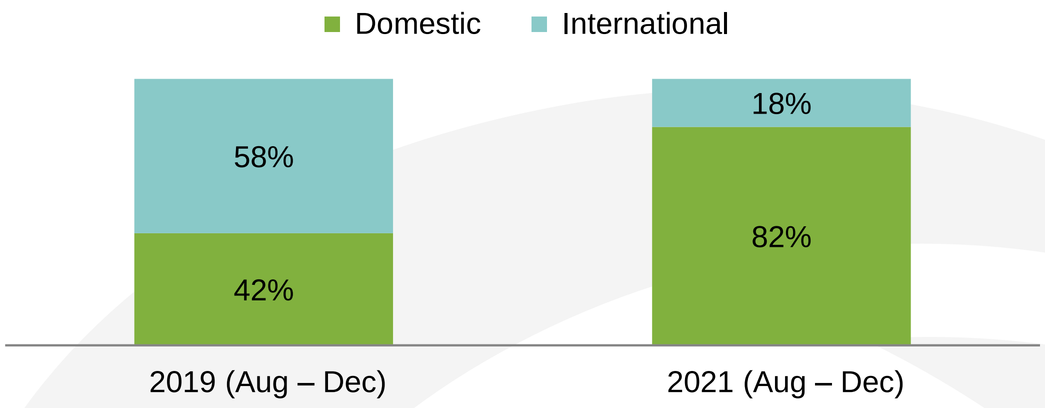
Very different guest composition under Covid

- Operators had to rely heavily on domestic market after reopening in 2021, as international travel was possible but awkward
- The same period in 2019 saw more international guests than domestic

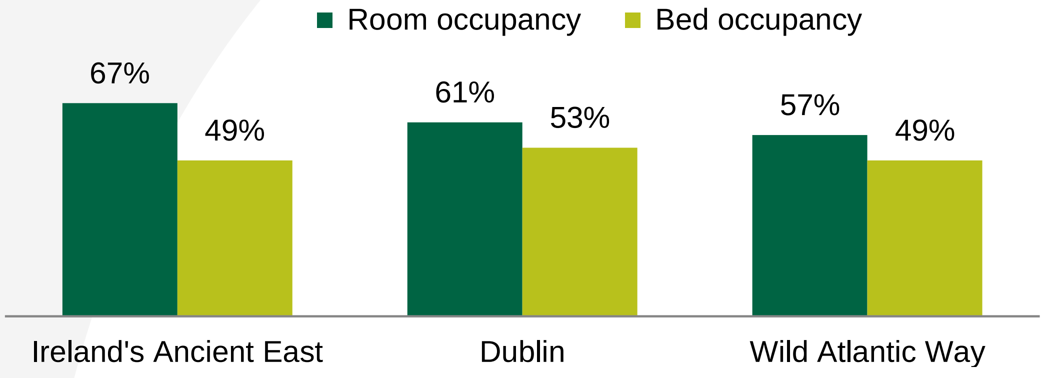
Importance of domestic guests shows in room occupancy in Ireland's Ancient East

- Previous trend analysis has shown that majority of guests in Ireland's Ancient East are domestic, whereas Dublin and Wild Atlantic Way are relatively more dependent (than Ireland's Ancient East) on international guests

Guesthouse % split by domestic / international



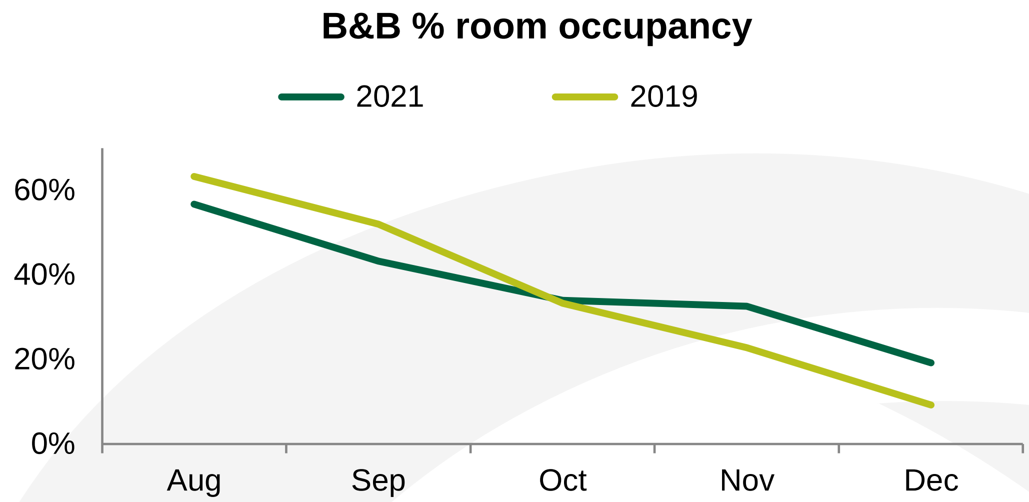
Guesthouse % occupancy by destination

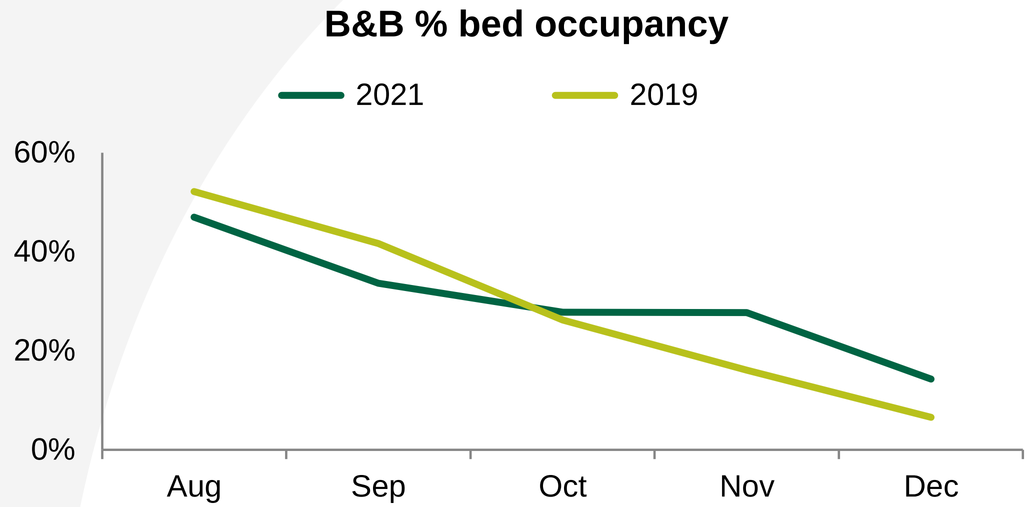


B&Bs (1)

Back 'on par' by October

- B&B occupancy levels started below pre-pandemic levels after reopening but caught up by October, for those open
- However, the closed businesses started to greatly outnumber open businesses from October onwards
- Overall net occupancy rates for August – December were:
  - 43% room occupancy in 2021 vs 42% in 2019
  - 35% bed occupancy in 2021 vs 34% in 2019
- However, recovery in the back end of 2021 did not mean a good 2021 performance for B&Bs – the November 2021 barometer showed that turnover for the year was significantly down for most operators compared to 2019





B&Bs (2)

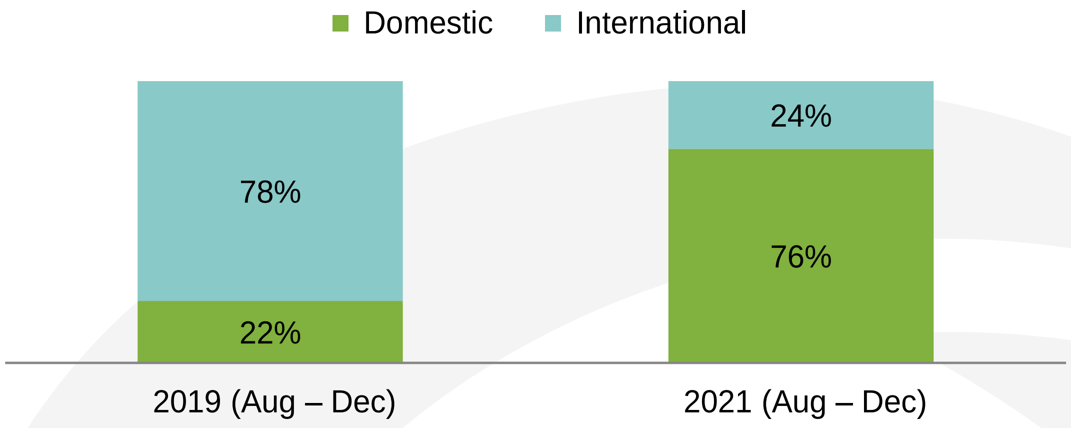
Reversal in guest composition under Covid

- Pre-pandemic, B&Bs were heavily reliant on international guests – guest composition was reversed on reopening

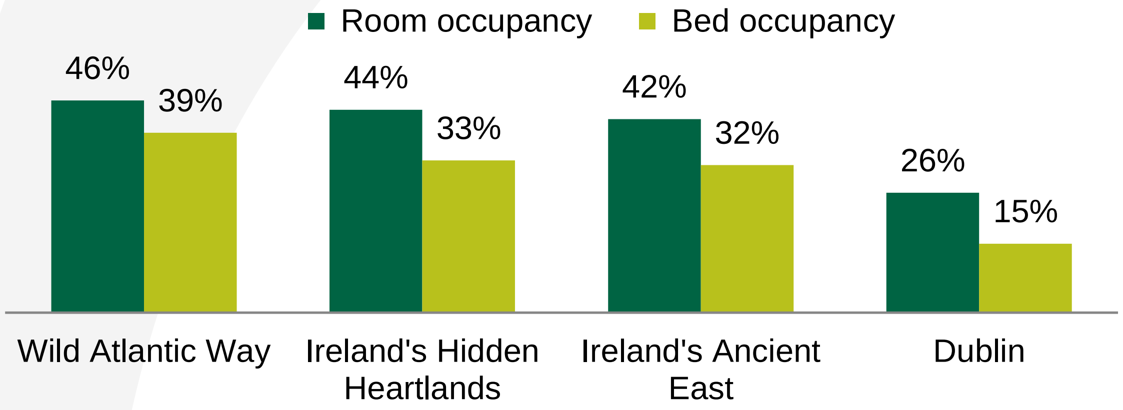
Hard times for B&Bs in Dublin

- Lack of international visitors to Ireland hit B&Bs in Dublin particularly hard, as they struggled to make up the shortfall with domestic tourists
- Regions outside Dublin fared similarly to each other

B&B % split by domestic / international



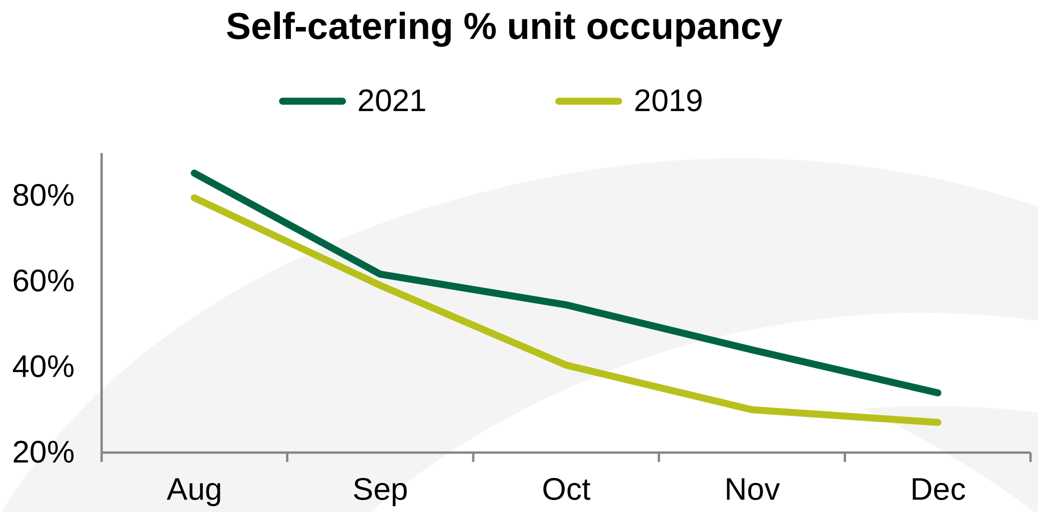
B&B % occupancy by destination

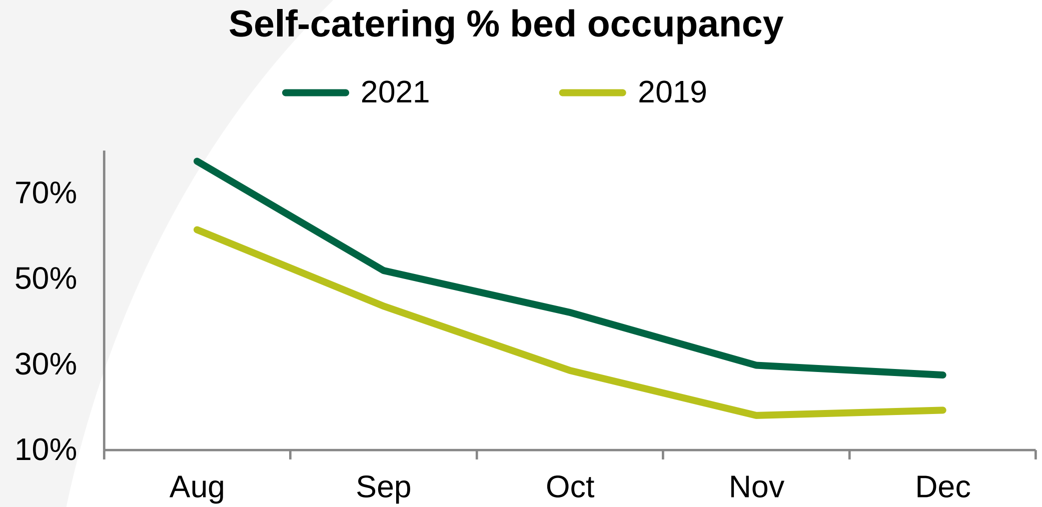


Self-catering (1)

Occupancy above pre-pandemic levels

- Self-catering occupancy levels were above 2019 in every month
- Overall occupancy rates for Aug – Dec were:
  - 59% unit occupancy in 2021 vs 50% in 2019
  - 49% bed occupancy in 2021 vs 36% in 2019
- This echoes the Nov 2021 barometer, which showed that self-catering was the best performing sector in 2021 in terms of turnover compared to 2019





Self-catering (2)

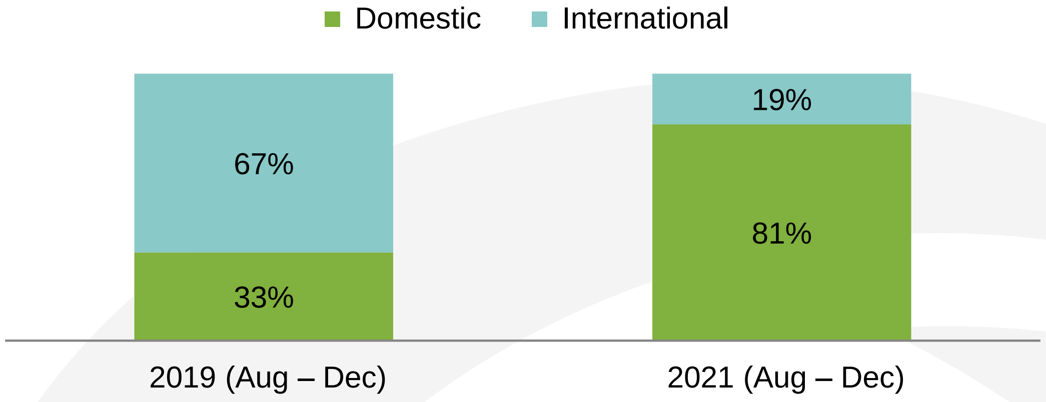
Strong occupancy rates came from domestic market

- Self-catering sector had to switch from relying on international guests to domestic
- Self-catering seems to have benefited from circumstances of international travel, as domestic market staying in Ireland has given the sector better occupancy than pre-pandemic

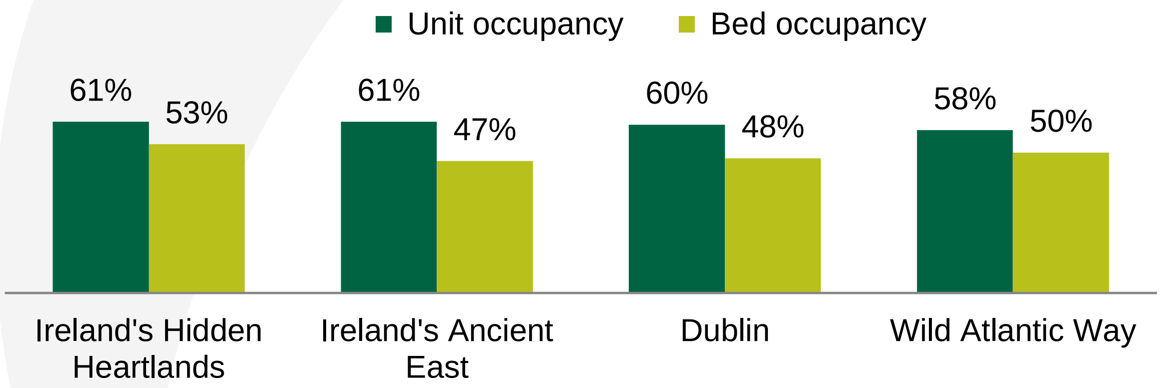
All regions performed well

- Strong market for self-catering benefits all regions, with no significant differences between them

Self-catering % split by domestic / international



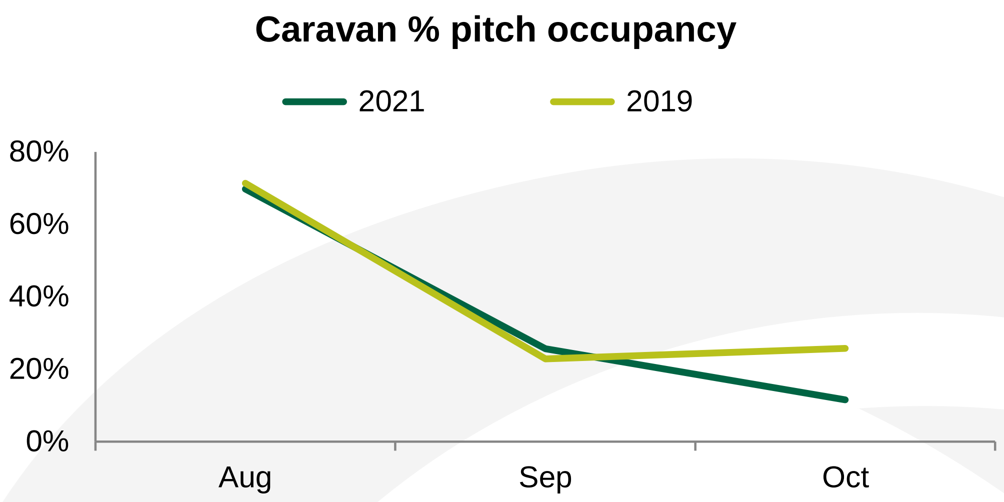
Self-catering % occupancy by destination

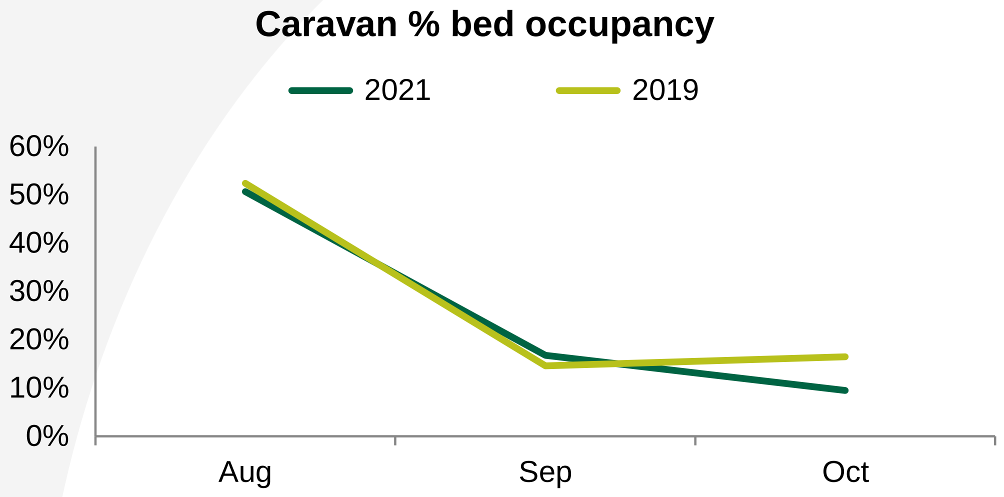


Caravan & Campsites (1)

On par with pre-pandemic levels

- Caravan & camping occupancy levels were on par with 2019 during Aug and Sep, before most operators closed from October
- This is consistent with the Nov 2021 barometer, which showed that around half of operators expected 2021 turnover to be up on 2019, and around half expected it to be down





Caravan & Campsites (2)

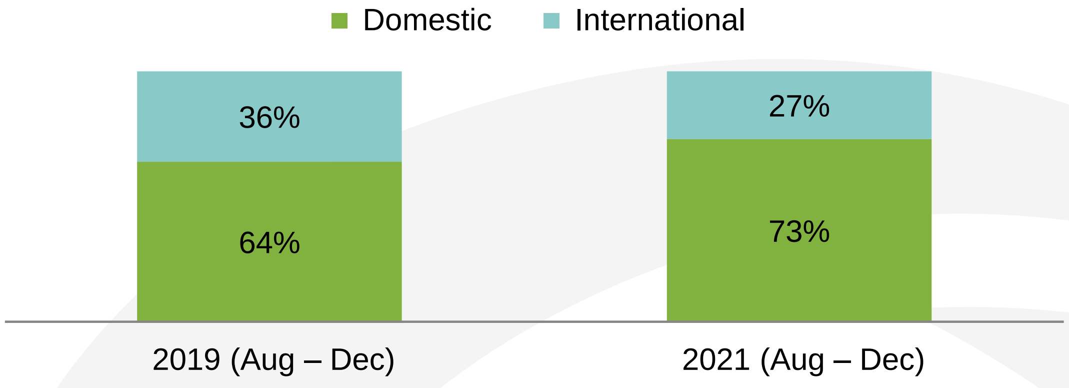
Only some shift in guest composition

- Unlike other sectors, caravan & campsites were already used to relying on the domestic market pre-pandemic
- The sector perhaps was unable to fully capitalise on strong domestic opportunities given that occupancy levels were same as 2019

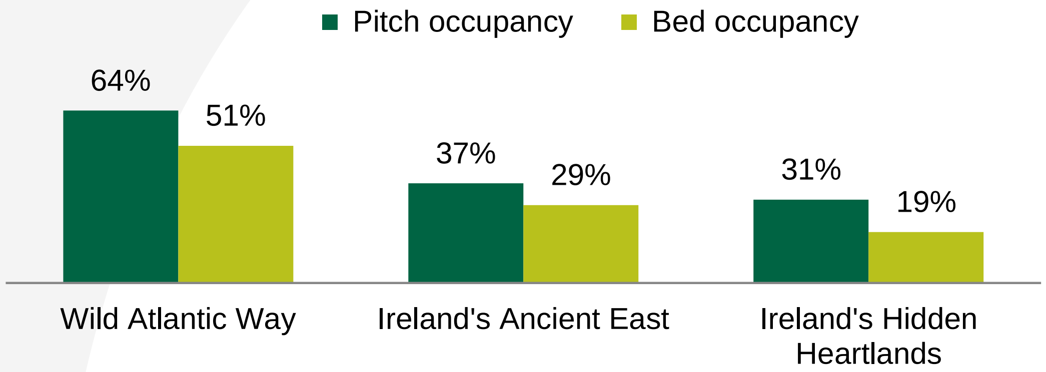
Wild Atlantic Way performed strongly

- Wild Atlantic Way outperformed the other regions in occupancy rates overall, although in August, the regions were comparable to each other

Caravan & camping % split by domestic / international



Caravan & camping % occupancy by destination

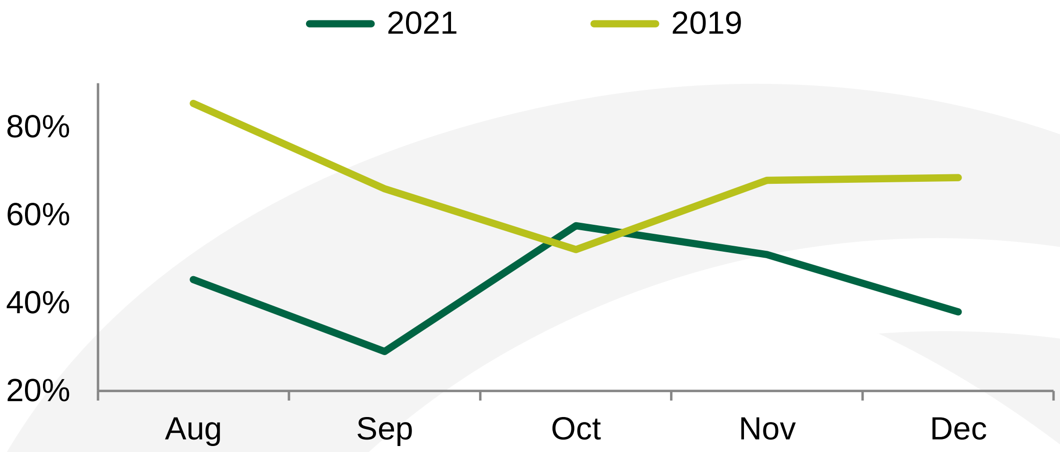


Hostels (1)

Well below normal, except in October

- Hostel occupancy levels were well down on 2019 in every month apart from October
- Overall bed occupancy rates for Aug – Dec were:
  - 43% in 2021 vs 68% in 2019
- This is consistent with the Nov 2021 barometer, which showed that most hostels expected 2021 turnover to be very substantially down on 2019

Hostel % bed occupancy

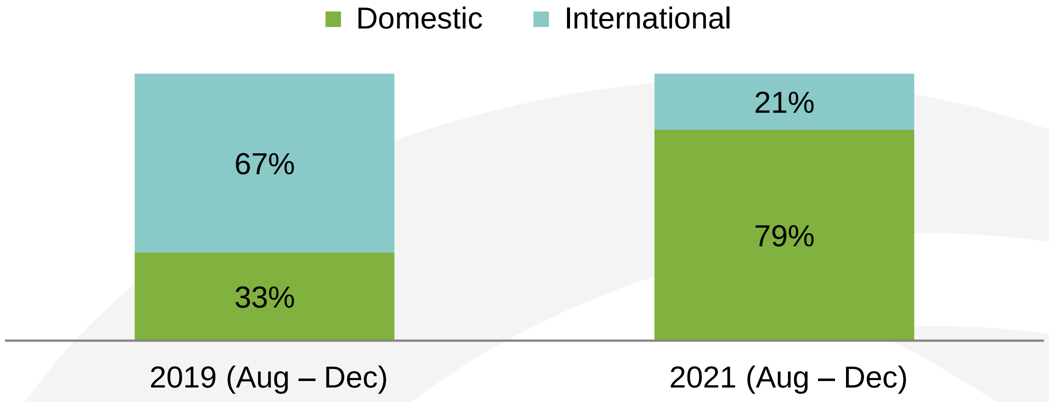


Hostels (2)

Shift to reliance on domestic market

- Like most other sectors, hostels had to adapt to attracting the domestic market in 2021
- Given the much lower occupancy rates compared to pre-pandemic, domestic tourists seem not to have warmed to the idea of staying in hostels very much

Hostel % split by domestic / international



No significant differences by region

- Sample sizes of open hostels in Dublin and Ireland's Hidden Heartlands are too small for comparisons
- Wild Atlantic Way and Ireland's Ancient East performed similarly to each other

Hostel % bed occupancy by destination

Thank you

Strategic Research and Insight

June 2022