

Accommodation Occupancy Survey

Strategic Research and Insight

Q3 2023



Summary and Background



Q3 2023 | Occupancy Survey

Summary

Occupancy levels remain higher or similar to 2022 in every sector

- **Guesthouse** room occupancy in Q3 2023 (83%) was very similar to Q3 2022 (82%) – the ‘recovery curve’ is now levelling off following much higher year-on-year occupancy levels for the first six months of 2023
- **B&B** room occupancy (74%) in Q3 2023 was higher than in Q3 2022 (66%) – but many B&Bs have remained closed, so net occupancy comparisons should be viewed with caution
- **Self-catering** unit occupancy in Q3 was 77% – very similar to Q3 last year (78%); 2022 was a good year for the sector
- **Hostel** bed occupancy (75%) in Q3 was similar to Q3 last year (72%) – the ‘recovery curve’ is now levelling off following Q2’s much higher year-on-year occupancy levels
- **Caravan & camping** pitch occupancy in Q3 was 69% – slightly higher than Q3 2022 (65%); growth could have been higher had the summer weather been better

Strong profile of international visitors

- International visitors occupied the majority of the bed spaces in Q3 in every sector except for caravan & camping – the [September Tourism Barometer](#) showed that the overseas market has been performing strongly this year

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
- The table below shows the number of monthly data forms completed by sector during Q3 2023

Sector / Month	Population	July sample			August sample			September sample		
		Open	Closed	Total	Open	Closed	Total	Open	Closed	Total
Guesthouses	138	50	12	62	44	10	54	42	9	51
B&Bs	916	202	54	256	179	57	236	121	62	183
Self-catering	525	205	29	234	205	34	239	120	38	158
Hostels	98	24	23	47	29	25	54	22	25	47
Caravan & camping	130	82	2	84	65	2	67	30	17	47

Individual Sectors



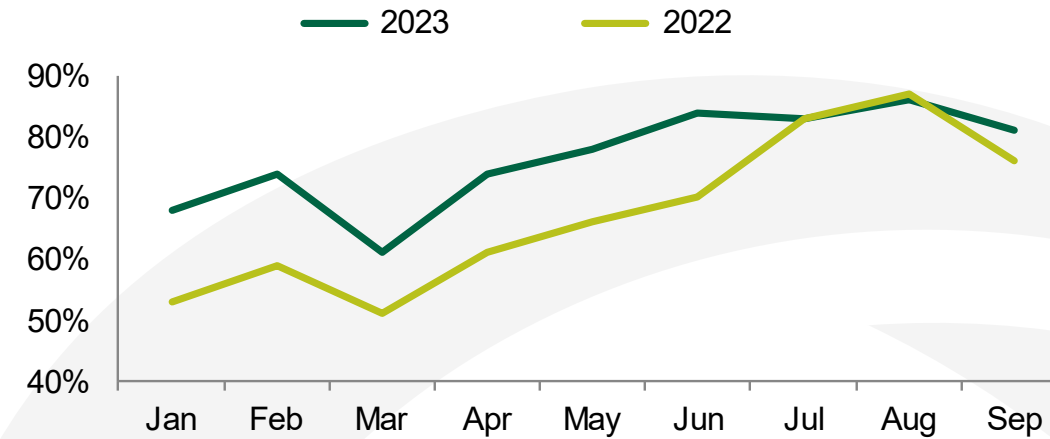
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Guesthouses (1)

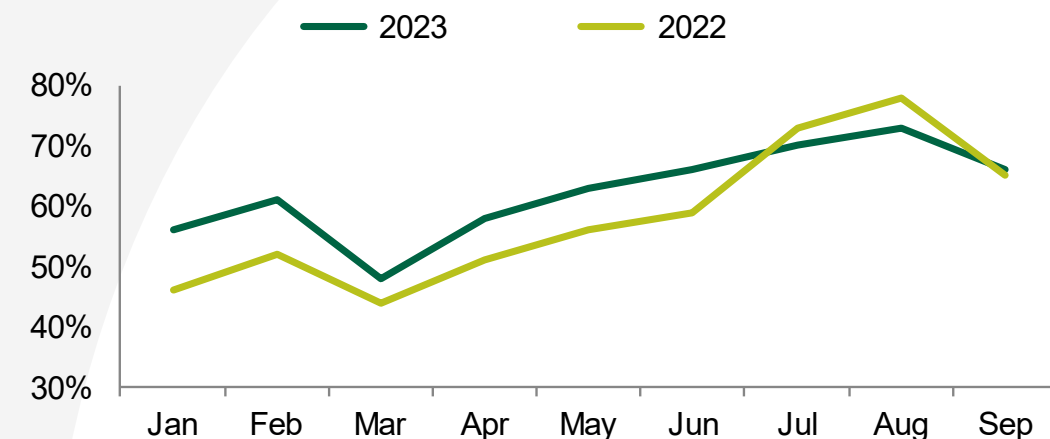
Sector has now recovered

- The guesthouse sector experienced high year-on-year occupancy levels throughout the first six months of 2023
- This recovery has now levelled off, with the peak season seeing very similar occupancy to 2022
- Overall net occupancy rates for July – September were:
 - 83% room occupancy in 2023 vs 82% in 2022
 - 70% bed occupancy in 2023 vs 72% in 2022
- The [September Tourism Barometer](#) showed that 16 out of 22 guesthouses giving data were up or level year to date vs 2022 – with the return of overseas visitors being the most frequently cited reason

Guesthouse % room occupancy



Guesthouse % bed occupancy



Guesthouses (2)

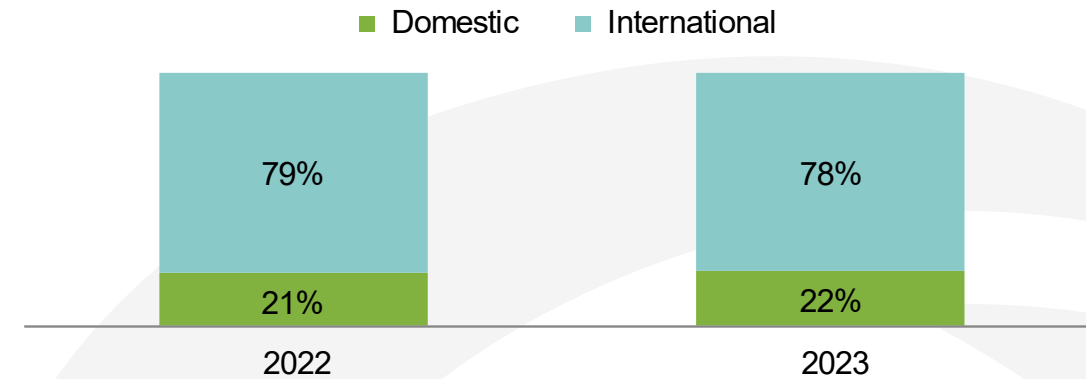
Visitor profile now back where it was in 2022

- Most (78%) Q3 visitors to guesthouses this year came from overseas – very similar to the same quarter last year
- Earlier quarters this year had seen the balance between domestic and international visitors tip towards the domestic market

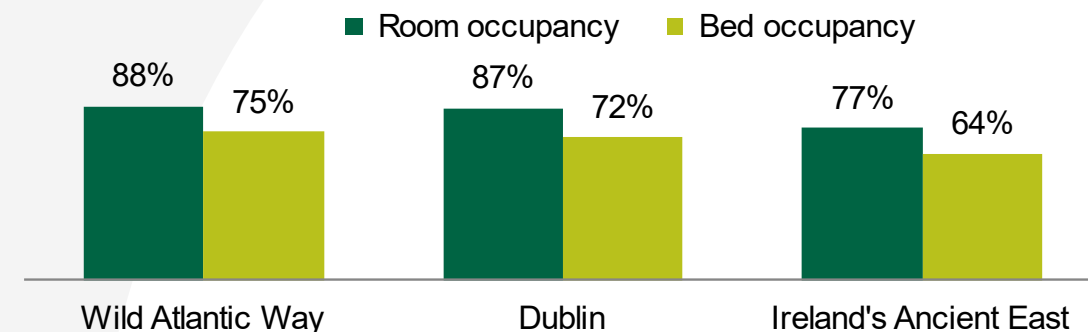
All regions performing well

- Early quarters this year saw Dublin performing ahead of the other regions
- Wild Atlantic Way has now matched Dublin's occupancy levels in Q3

Guesthouse % split by domestic / international (Jul-Sep)



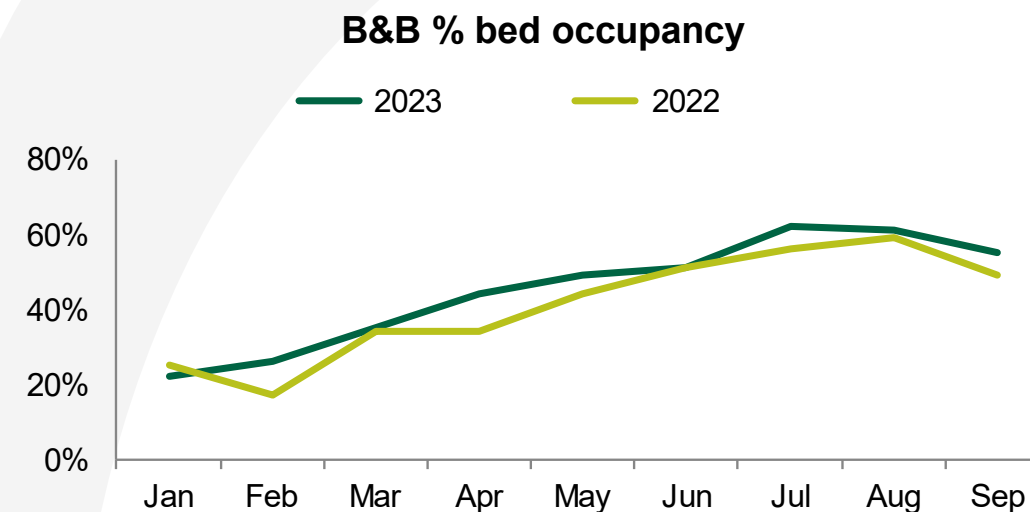
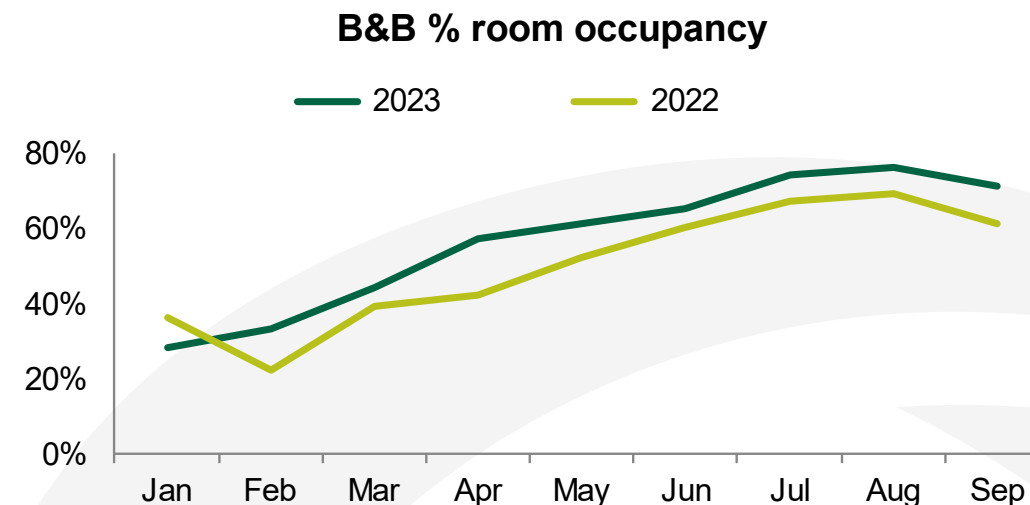
Guesthouse % occupancy by destination (Jul-Sep)



B&Bs (1)

Net occupancy remains ahead of last year

- B&B *net* occupancy levels across the quarter have remained ahead of 2022, as has been the case every month since February
- But many B&Bs have remained closed each month in Q3 (see *earlier background for details*)
- Overall net occupancy rates for July – September were:
 - 74% room occupancy in 2023 vs 66% in 2022
 - 59% bed occupancy in 2023 vs 55% in 2022
- The September Barometer showed that 43% of B&Bs were up year to date compared to 2022, whereas only 16% were down – with the return of overseas visitors standing out clearly as a positive factor (cited by 68% of operators)



B&Bs (2)

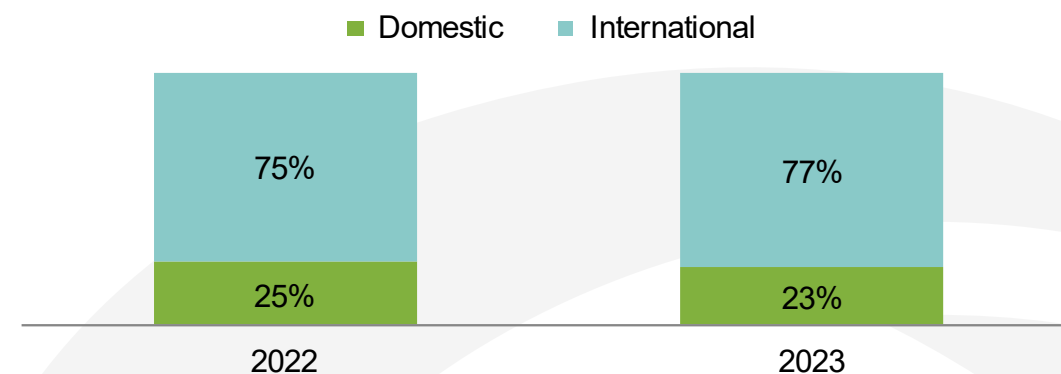
International visitors underpinning business

- International visitors made up about three quarters of the business in Q3
- The September Barometer showed that 70% of B&Bs were up on international visitors year to date compared to 2022, and only 8% were down

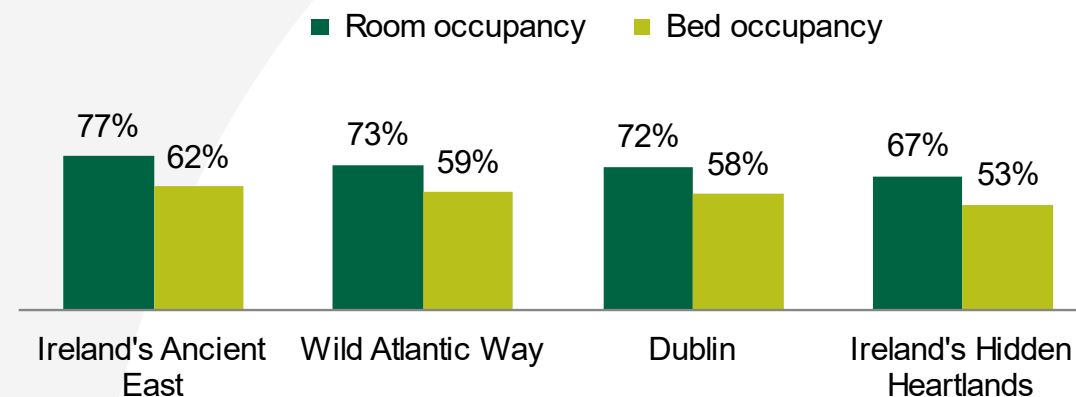
Fairly consistent performance by region

- The positive performance of the sector is being seen across all regions – all have performed significantly better in Q3 compared to last year

B&B % split by domestic / international (Jul-Sep)



B&B % occupancy by destination (Jul-Sep)

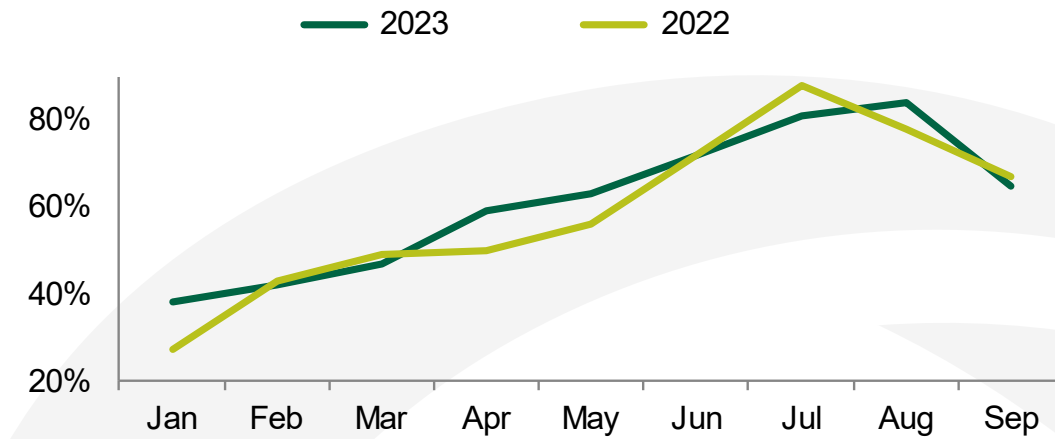


Self-catering (1)

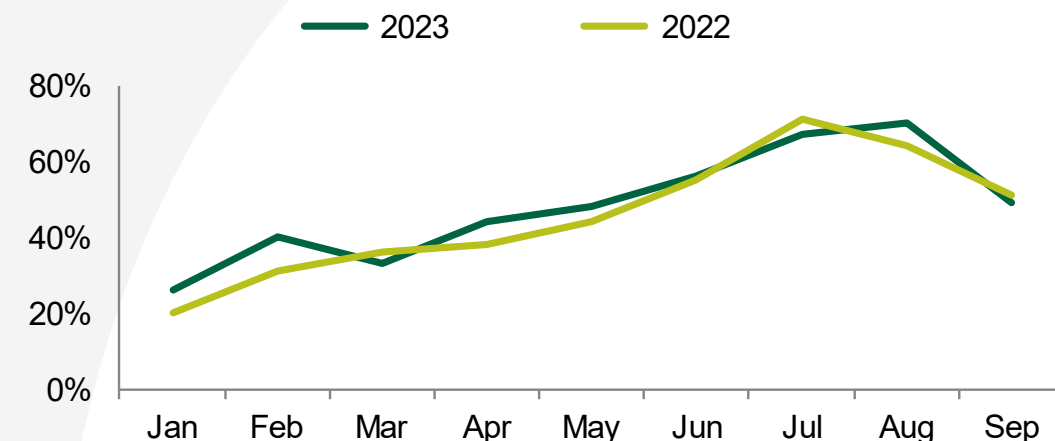
Similar overall performance to last year

- Self-catering occupancy rates dipped below last year in July but then surpassed last year in August
- Occupancy rates for Q3 overall were similar to last year:
 - 77% unit occupancy in 2023 vs 78% in 2022
 - 62% bed occupancy in 2023 vs 62% in 2022
- The September Barometer showed that the sector has once again benefited greatly from repeat visitors – 71% cited this as a positive factor on performance

Self-catering % unit occupancy



Self-catering % bed occupancy



Self-catering (2)

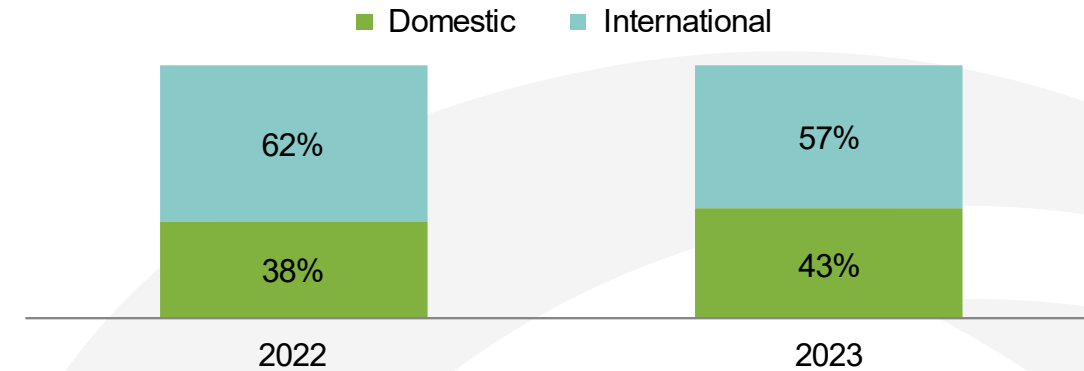
Both markets remain important

- International visitors represented over half of self-catering business in Q3, and the September Barometer also showed that this market has been performing well this year
- However, the domestic market also plays an important role in this sector by contributing many repeat visitors – the proportion of domestic visitors in Q3 was higher than last year

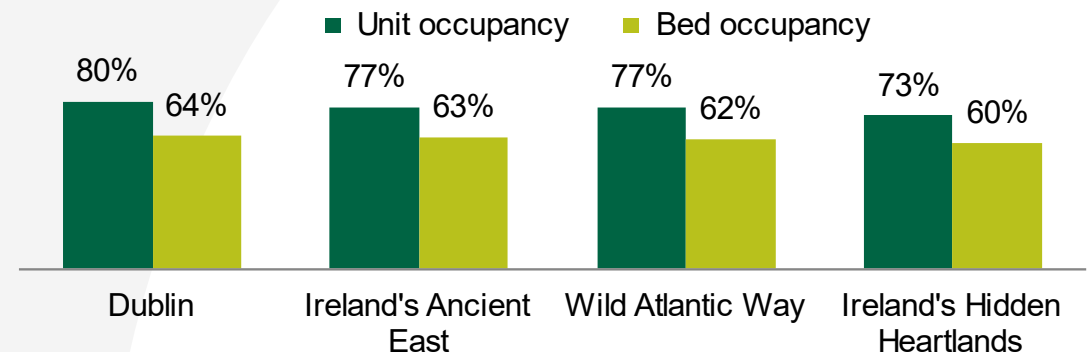
Varied year-on-year changes by region

- Occupancy levels in Q3 were quite high across all regions
- Wild Atlantic Way saw growth of 4% pts and Dublin's occupancy remained very similar to Q3 last year
- In contrast, Ireland's Ancient East (-7% pts) and Ireland's Hidden Heartlands (-8% pts) both saw decreases

Self-catering % split by domestic / international (Jul-Sep)



Self-catering % occupancy by destination (Jul-Sep)

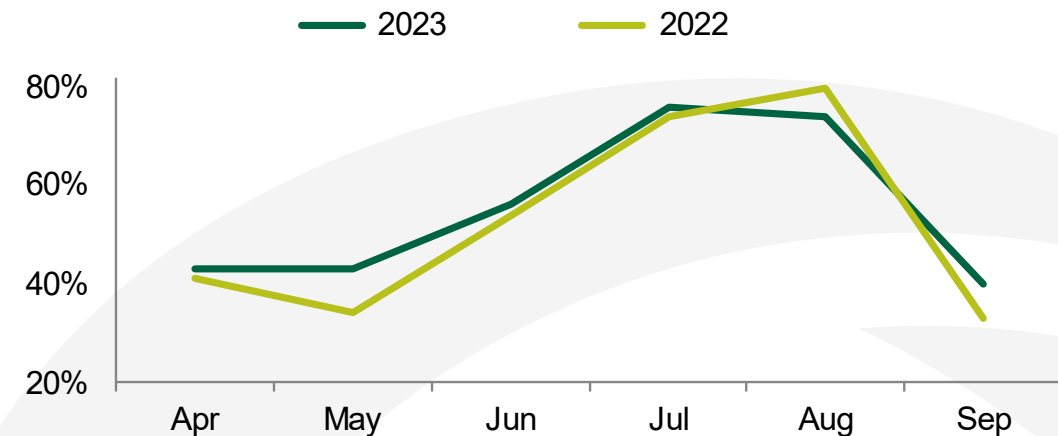


Caravan and Camping (1)

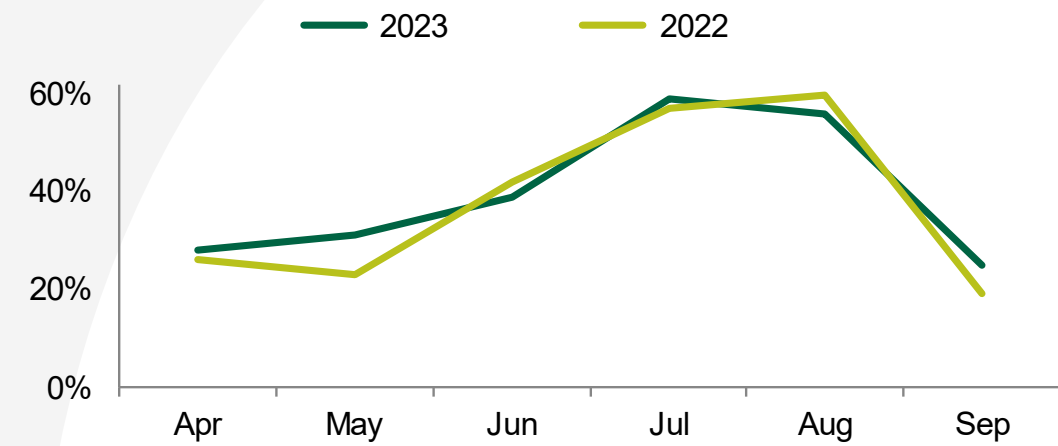
Good occupancy – could have been higher still

- Overall occupancy rates for July – September were:
 - 69% pitch occupancy in 2023 vs 65% in 2022
 - 52% guest occupancy in 2023 vs 48% in 2022
- Whilst occupancy rates for the quarter showed continued year-on-year growth in the sector, rates could have been higher still had it not been for persistent bad weather in late July and the first half of August – a key holiday period
- The September Barometer highlighted the weather as the joint highest concern in the sector affecting business this year

Caravan & camping % pitch occupancy



Caravan & camping % guest occupancy



Caravan and Camping (2)

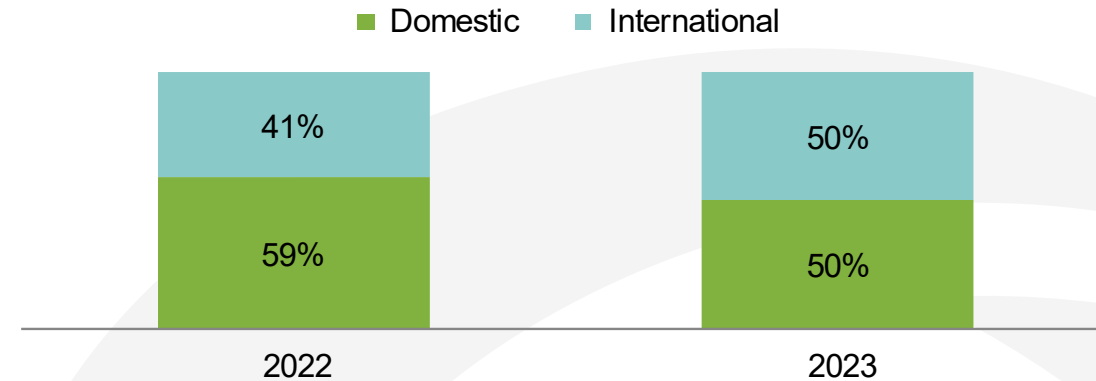
50/50 domestic and international split

- The balance between the domestic and international markets was 50/50 in Q3 – as was the case in Q2, but the domestic balance was higher in Q3 2022
- The September Barometer showed a stable domestic market year-to-date but a very strong overseas market (whereby 21 out of 25 operators reported to be up)

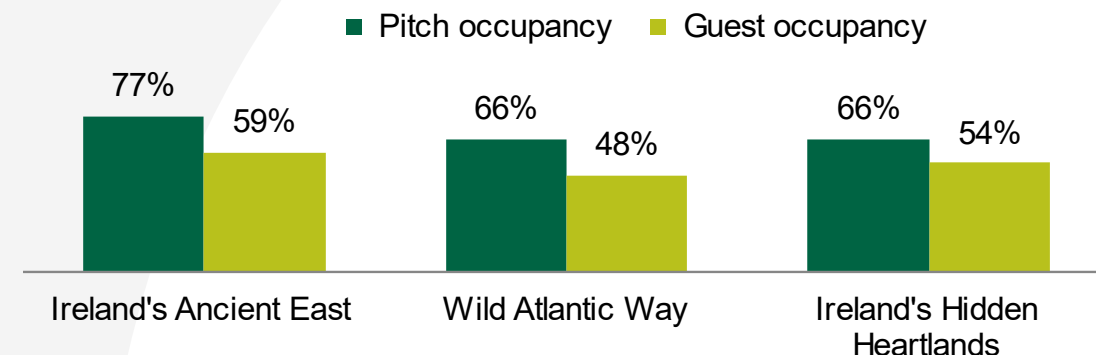
Resurgent Ireland’s Ancient East

- Ireland’s Ancient East performed particularly well in Q3 with an average pitch occupancy of 77% (up 14% pts from Q3 in 2022)

Caravan & camping % split by domestic / international (Jul-Sep)



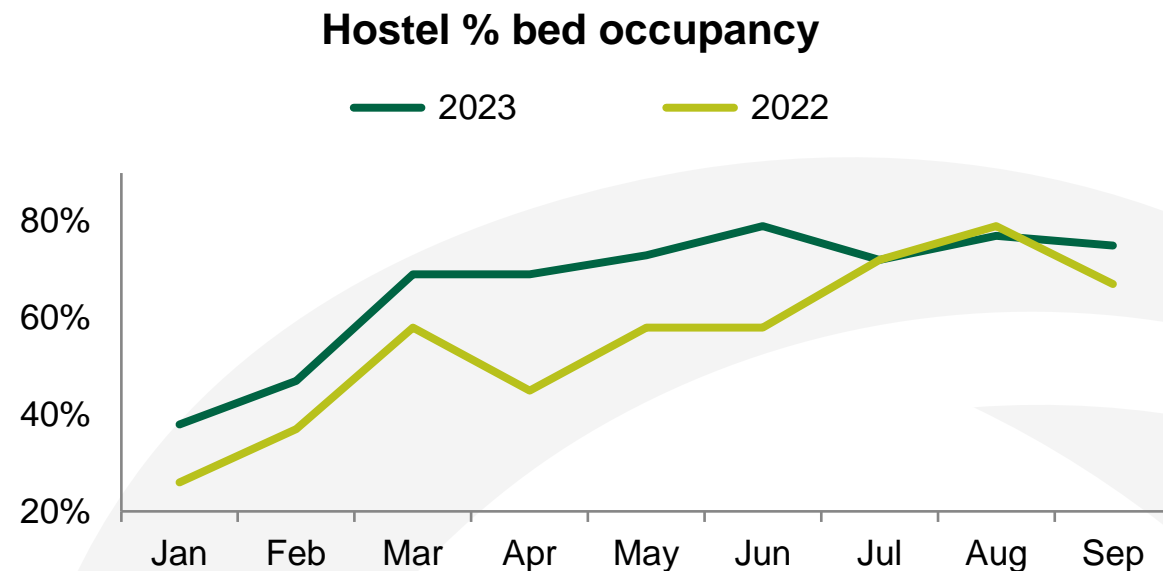
Caravan & camping % occupancy by destination (Jul-Sep)



Hostels (1)

Sector has recovered well

- The hostels sector was hit particularly hard during the pandemic due to the nature of the accommodation (not easily segregated) and its reliance on international visitors
- Following many months of high year-on-year increases, occupancy levelled off to 2022 rates in July and August
- Overall bed occupancy rates for July – September were:
 - 75% in 2023 vs 72% in 2022



Hostels (2)

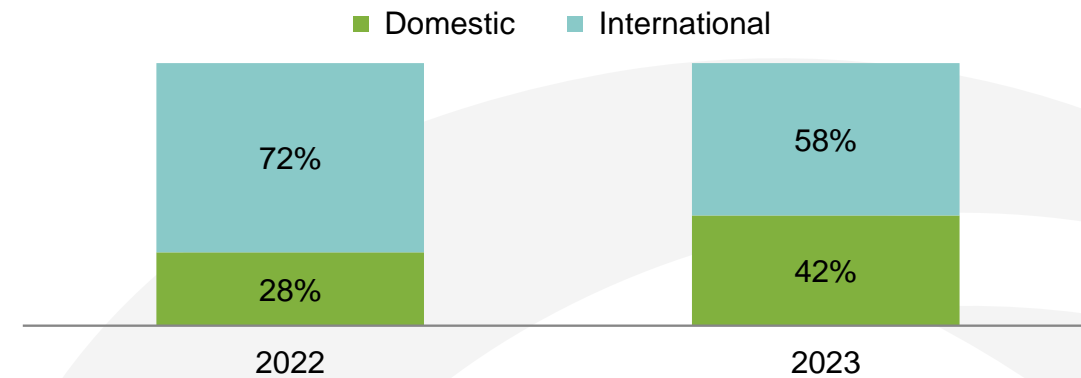
Balance tipped back towards domestic visitors

- The proportion (42%) of domestic visitors in Q3 this year was significantly higher than in Q3 last year (28%)
- Q2 showed a similar difference between 2023 and 2022
- The May Barometer findings suggested that this does not necessarily mean that the international market weakened; rather, the domestic market has performed well also (*the September Barometer had a very small sample size for hostels*)

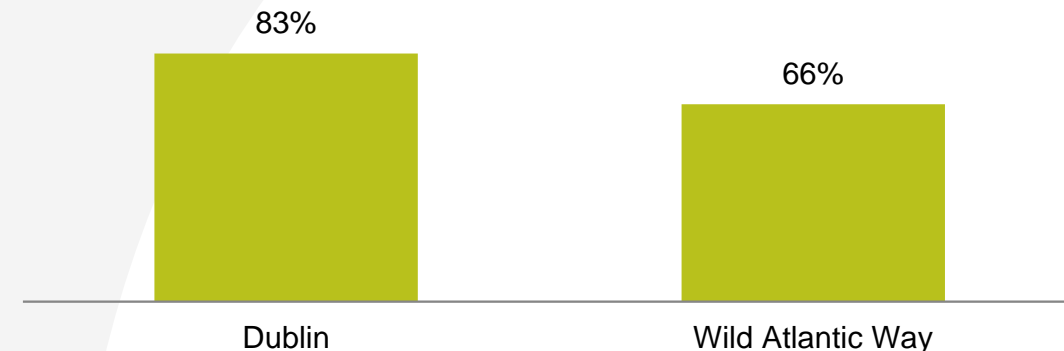
Dublin hostels continue to be very busy

- Hostel occupancy rates in Dublin continued to outperform other regions in Q3
- The sample sizes for Ireland’s Ancient East and Ireland’s Hidden Heartlands are too small to split individually, but the indication is that hostels in Dublin remain much fuller than those outside of Dublin

Hostel % split by domestic / international (Jul-Sep)



Hostel % bed occupancy by destination (Jul-Sep)





Thank you

Strategic Research and Insight

November 2023

