



# Fáilte Ireland

National Tourism Development Authority

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## Fáilte Ireland Hotel Review 2009

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## Introduction

The Hotel Survey has been conducted by Bord Fáilte/Fáilte Ireland since 1963. In 2008, 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 2009, and also draws comparisons with recent years. The Review of Hotel Performance in 2009 also presents highlights of the Visitor Attitudes Survey 2009 which are pertinent to the hotel industry. A capacity update for 2010 is also included in this report.

The following Summary highlights the key points emerging from the 2009 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, occupancy rates at national and also at 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

- Hotels experienced declines in both room and bed occupancy in 2009. This fall off in guestnight demand was driven by a weakness in overseas business and some of the most challenging economic circumstances ever faced by the Irish Hotel industry.

### Capacity and Demand

- The changes in capacity were not met by sufficient demand in 2009, resulting in falling room and bed occupancy rates. This has produced an overall decrease in room occupancy (58% in 2008 and 55% in 2009) and bed occupancy (43% in 2008 and 42% in 2009) rates.
- In 2010, there was no change in registered room capacity in Shannon and the South East regions, while decreases in the South West and East and Midlands regions were offset by increases in Dublin, West and the North West.
- Following several years of expansion, growth in registered room capacity remained static at national level between 2009 and 2010.

### Grade

- Grade 4\* hotels experienced the highest occupancy rates throughout 2009.
- Half (50%) of all bednight sales in Grade 5\* hotels are attributable to overseas visitors, with North American (24%) and British (14%) guests being most prevalent.

### Regions

- Room occupancy rates have declined across most regions with Shannon suffering the greatest decline, dropping 8 percentage points. The South East and South West experienced no change in room occupancy.
- Despite only accounting for 31% of the total market at a national level, overseas visitors account for almost half (48%) of all bednights sold in Dublin during 2009.
- The domestic market is very important in the North West, South East and East & Midlands regions where it accounts for more than 85% of all bednights sold. Northern Ireland is also very important to the North West where it accounts for a quarter (25%) of all bednight sales.

### Hotel Size

- Large hotels (100+ rooms) experienced an eleven percentage point decrease in occupancy rates, falling to their lowest level in six years. However, the smaller hotels (those with less than 20 rooms) have experienced slight increases in their annual room occupancy rates.
- Overseas visitors were most prevalent in large hotels (100+ rooms) accounting for more than one third (34%) of all guests in this category.

### Location

- Hotels in all areas experienced decreases in their room occupancy rates between 2008 and 2009 to their lowest level in the past six years.

- Overseas visitors accounted for 41% of all hotel nights in Major Metropolitan Areas (MMAs). In Other Urban and Rural locations only around one fifth (22% and 20% respectively) of guest nights are attributable to overseas visitors.

## **Markets**

- Guestnight demand fell by 2% in 2009, however the number of beds sold is greater than those sold in any year prior to 2007.
- The drop in demand in 2009 was mainly due to a decline in the overseas markets, particularly from Britain.
- For the second year running the Republic of Ireland's market share is still the highest it has been in six years (65%), due to declining overseas demand.
- Northern Ireland's overall market share of bednight sales has remained static at 4%, despite a 4% increase in demand.
- Overseas market share has remained at 31% for the second year running, this is however its lowest point over a six year period.

# 1 Capacity and Demand

**Table 1.1 Number of Registered Hotels**

	2005	2006	2007	2008	2009	2010	Growth Rate 2010 vs 2009 (%)
Dublin	143	137	151	154	160	159	-1
East & Midlands	108	108	118	124	130	124	-5
South East	106	102	108	112	112	111	-1
South West	165	158	161	163	166	163	-2
Shannon	85	77	85	90	92	90	-2
West	137	127	140	144	148	145	-2
North West	109	105	105	107	107	110	+3
<b>Total</b>	<b>853</b>	<b>814</b>	<b>868</b>	<b>894</b>	<b>915</b>	<b>902</b>	<b>-1</b>

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

	2005	2006	2007	2008	2009	2010	Growth Rate 2010 vs. 2009 (%)
Dublin	14.0	15.2	16.6	18.6	19.1	19.2	+1
East & Midlands	4.3	4.8	6.3	6.7	7.1	6.9	-3
South East	4.3	4.5	5.4	5.6	5.6	5.6	n.c.
South West	8.7	8.9	9.6	10.6	10.4	10.3	-1
Shannon	4.5	4.4	4.7	5.5	5.4	5.4	n.c.
West	5.7	5.8	6.5	6.8	7.1	7.3	+3
North West	4.2	4.7	5.0	5.2	5.3	5.5	+4
<b>Total</b>	<b>45.7</b>	<b>48.2</b>	<b>54.1</b>	<b>59.0</b>	<b>60.1</b>	<b>60.2</b>	<b>*</b>

**Table 1.3 Average Hotel Occupancy Rates (%)**

	2004	2005	2006	2007	2008	2009
Bed Occupancy	44	46	46	46	43	42
Room Occupancy	60	62	64	64	58	55

- After three consecutive increases from 2006, the growth in registered hotels was arrested between 2009 and 2010 dropping by 1% nationally.
- There was no change in registered room capacity in Shannon and the South East regions, while decreases in the South West and East and Midlands regions were offset by increases in Dublin, West and the North West.
- Following several years of expansion, growth in registered room capacity remained static at national level between 2009 and 2010.
- The changes in capacity across regions in 2009 were not met by sufficient demand, resulting in falling room and bed occupancy rates.

## 2 Grade

**Table 2.1 Capacity and Demand (000's)**

	5*	4*	3*	2* & 1* <sup>1</sup>
<b>Bed Capacity</b>				
2009	3,007	18,986	22,612	3,156
2008	2,697	17,602	24,077	3,851
<i>Year on year change</i>	+12%	+13%	-6%	-18%
<b>Bed Nights Sold</b>				
2009	1,222	8,412	9,502	895
2008	1,180	7,455	10,718	1,202
<i>Year on year change</i>	+4%	+13%	-11%	-26%
<b>Room Capacity</b>				
2009	1,359	8,557	10,228	1,507
2008	1,235	7,804	10,158	1,822
<i>Year on year change</i>	+10%	+10%	+1%	-17%
<b>Room Nights Sold</b>				
2009	708	4,896	5,674	583
2008	719	4,585	6,199	790
<i>Year on year change</i>	-2%	+7%	-8%	-26%

<sup>1</sup> 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 2009 (%)**

	5*	4*	3*	2* & 1*
Britain	14	8	12	13
Mainland Europe	9	7	13	15
North America	24	7	6	4
Rest of World	4	2	4	3
<b>Total Overseas</b>	<b>50</b>	<b>23</b>	<b>35</b>	<b>36</b>
Northern Ireland	2	3	5	5
Republic of Ireland	48	73	61	59
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

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

### 2.3 Room Occupancy – By Grade 2009 (%)

	All	5*	4*	3*	2*&1*
January-March	44	44	46	44	32
April	52	50	53	53	37
May	58	50	60	60	41
June	62	55	63	64	40
July	68	62	71	69	47
August	73	68	75	74	52
September	62	60	66	62	45
October-December	50	49	52	49	34
<b>Year</b>	<b>55</b>	<b>52</b>	<b>57</b>	<b>55</b>	<b>39</b>

- Grade 4\* hotels experienced the highest occupancy rates throughout 2009.
- Grade 1\* and 2\* hotels performed poorly only achieving 39% occupancy in 2009.
- Half (50%) of all bednight sales in Grade 5\* hotels are attributable to overseas visitors, with North American (24%) and British (14%) guests being most prevalent.
- Domestic visitors made up the majority of bednights across all other grades, accounting for almost three quarters (73%) 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
<b>Bed Capacity</b>							
2009	15,558	5,602	4,453	8,125	4,129	5,709	4,223
2008	14,747	5,476	4,852	8,747	4,672	5,653	4,298
<i>Year on Year Change</i>	+5%	+2%	-8%	-7%	-12%	+1%	-2%
<b>Bed Nights Sold</b>							
2009	7,017	1,645	1,992	3,674	1,660	2,606	1,478
2008	6,972	1,701	2,021	3,596	1,947	2,726	1,592
<i>Year on Year Change</i>	+1%	-3%	-1%	+2%	-15%	-4%	-7%
<b>Room Capacity</b>							
2009	7,058	2,581	2,001	3,658	1,931	2,549	1,888
2008	6,704	2,438	2,012	3,645	1,936	2,431	1,852
<i>Year on Year Change</i>	+5%	+6%	-1%	*	*	+5%	+2%
<b>Room Nights Sold</b>							
2009	4,371	1,038	1,115	2,105	958	1,426	875
2008	4,453	1,118	1,123	2,109	1,125	1,425	941
<i>Year on Year Change</i>	-2%	-7%	-1%	*	-15%	*	-7%

**Table 3.2 Room Occupancy – by Region 2009 (%)**

	Total	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Year	55	62	40	56	58	50	56	46
January-March	44	52	30	41	47	42	42	35
April	52	58	37	55	50	50	54	47
May	58	65	44	61	59	54	59	50
June	62	68	41	64	67	58	66	51
July	68	73	46	69	73	62	77	58
August	73	74	54	76	82	67	82	66
September	62	72	50	59	65	51	62	54
October-December	50	59	39	53	48	42	46	41

**Table 3.3 Distribution of Regional Guest Nights by Market Area 2009 (%)**

	Total	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Britain	10	16	7	5	10	8	5	8
Mainland Europe	10	18	4	2	7	13	6	3
North America	8	9	2	4	8	11	8	2
Rest of World	3	5	1	1	2	1	2	2
<b>Total Overseas</b>	<b>31</b>	<b>48</b>	<b>15</b>	<b>13</b>	<b>27</b>	<b>33</b>	<b>21</b>	<b>14</b>
Northern Ireland	4	2	4	1	3	1	2	25
Republic of Ireland	65	49	81	86	70	67	76	60
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

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

**Table 3.4 Regional Room Occupancy (%)**

	2004	2005	2006	2007	2008	2009
Dublin	69	71	72	72	66	62
East & Midlands	50	53	54	54	46	40
South East	58	55	60	57	56	56
South West	62	63	67	66	58	58
Shannon	57	60	63	61	58	50
West	54	57	59	60	59	56
North West	51	54	56	57	51	46

\*Note: 2005-2008 data are not directly comparable with previous years due to boundary changes.

- In the South East and South West room supply and demand have remained generally stagnant. This has produced room occupancy rates at a similar level to 2008.
- Shannon has suffered the greatest decline in room occupancy rates, dropping 8 percentage points.
- All regions, with the exception of West and the South East, recorded their lowest occupancy levels in the last six years.
- Overseas markets accounts for 31% of total bednights sold, however almost half (48%) of all bednights sold in Dublin were attributable to overseas visitors.
- Visitors from Northern Ireland accounted for between 1% and 4% of bednights sold in most regions, with the exception of the North West, where a quarter (25%) of total bednight sales are attributable to this market.
- The domestic market accounted for more than 80% of bednights sold in the South East and East & Midlands regions. Dublin is the least dependent region on this market with just under half (49%) of all guestnights attributable to the Irish 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
<b>Bed Capacity</b>				
2009	2,326	6,646	13,539	25,287
2008	2,404	6,740	13,402	25,899
<i>Year on Year Change</i>	-3%	-1%	+1%	-2%
<b>Bed Nights Sold</b>				
2009	751	2,614	5,691	11,017
2008	803	2,701	5,719	11,331
<i>Year on Year Change</i>	-6%	-3%	*	-3%
<b>Room Capacity</b>				
2009	1,103	3,010	6,139	11,415
2008	1,090	2,924	5,680	11,325
<i>Year on Year Change</i>	+1%	+3%	+8%	+1%
<b>Room Nights Sold</b>				
2009	463	1,537	3,305	6,582
2008	504	1,616	3,290	6,885
<i>Year on Year Change</i>	-8%	-5%	*	-4%

**Table 4.2 Room Occupancy by Hotel Size 2009 (%)**

	Total	1 - 20 Rooms	21 - 49 Rooms	50 - 99 Rooms	100+ Rooms
Year	55	42	51	54	58
January-March	44	33	40	42	47
April	52	40	49	51	54
May	58	45	55	57	61
June	62	46	58	61	65
July	68	52	64	68	70
August	73	58	70	74	74
September	62	49	58	61	66
October-December	50	37	45	48	53

**Table 4.3 Distribution of Guest Nights by Market Area, by Hotel Size 2009 (%)**

	Total	1 - 20 Rooms	21 - 49 Rooms	50 - 99 Rooms	100+ Rooms
Britain	10	9	10	9	12
Mainland Europe	10	8	9	8	12
North America	8	5	6	7	8
Rest of World	3	2	2	2	3
<b>Total Overseas</b>	<b>31</b>	<b>25</b>	<b>27</b>	<b>26</b>	<b>35</b>
Northern Ireland	4	6	6	5	3
Republic of Ireland	65	69	67	70	62
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

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

**Table 4.4 Room Occupancy by Hotel Size (%)**

	2004	2005	2006	2007	2008	2009
<b>1 - 20 Rooms</b>	39	39	46	44	46	42
<b>21 - 49 Rooms</b>	52	55	55	56	55	51
<b>50 - 99 Rooms</b>	62	63	61	59	58	54
<b>100+ Rooms</b>	66	68	70	72	61	58

- Demand for rooms remained similar to the levels experienced in 2008 for hotels with 50-99 rooms, however the total number of rooms available increased by 8%. This resulted in a four percentage point decrease in occupancy rates, taking this to the lowest level in six years.
- There have been small increases in supply and decreasing demand for hotels with 1-20, 21-49 and 100+ rooms. The availability of rooms increased between 1% and 3%, while demand fell between 4% and 8% which resulted in the decrease in occupancy rates in 2009.
- Room occupancy rates in hotels with 21-49, 50-99 and 100+ rooms have continued to deteriorate since 2007 and have now all fallen to their lowest levels in six years.
- In hotels with 1-20 rooms, occupancy rates decreased by 4% but remain at higher levels to those experienced in 2004 and 2005.
- The large hotels (100+ rooms) had the highest proportion of overseas visitors (35%), with Britain (12%) and 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
<b>Bed Capacity</b>			
2009	22,145	7,845	17,808
2008	21,377	8,243	18,825
<i>Year on Year Change</i>	+4%	-5%	-5%
<b>Bed Nights Sold</b>			
2009	9,889	3,125	7,058
2008	9,843	3,247	7,464
<i>Year on Year Change</i>	*	-4%	-5%
<b>Room Capacity</b>			
2009	10,068	3,557	8,043
2008	9,438	3,480	8,100
<i>Year on Year Change</i>	+7%	+2%	-1%
<b>Room Nights Sold</b>			
2009	5,999	1,828	4,060
2008	6,005	1,912	4,378
<i>Year on Year Change</i>	*	-4%	-7%

**Table 5.2 Room Occupancy by Location 2009 (%)**

	Total	MMA	Other Urban	Rural
Year	55	60	51	50
January–March	44	49	41	39
April	52	56	47	48
May	58	63	55	54
June	62	66	59	57
July	68	73	63	63
August	73	76	72	70
September	62	68	59	57
October–December	50	55	45	45

**Table 5.3 Distribution of Guest Nights by Market Area, by Location 2009 (%)**

	All	MMA	Other Urban	Rural
Britain	10	13	8	7
Mainland Europe	10	14	6	6
North America	8	9	6	6
Rest of World	3	4	2	1
<b>Total Overseas</b>	<b>31</b>	<b>41</b>	<b>22</b>	<b>20</b>
Northern Ireland	4	2	4	7
Republic of Ireland	65	56	74	73
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

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

**Table 5.4 Room Occupancy by Location (%)**

	2004	2005	2006	2007	2008	2009
MMA	65	68	68	70	64	60
Other Urban	61	64	64	62	55	51
Rural	53	53	58	59	54	50

- Hotels in all areas experienced decreases in their room occupancy rates between 2008 and 2009 and are now at their lowest levels in the past six years.
- The fall in room occupancy in Major Metropolitan Areas (MMAs) is due to an increasing supply of rooms (+7%) coupled with static demand.
- The four percentage point fall in room occupancy in Other Urban Areas is due to an increasing supply of rooms (+2%) coupled with falling demand for rooms.
- Rural hotels experienced a declining supply of rooms, but also endured a significant decrease in demand (-7%).
- Overseas visitors accounted for 41% of all hotel nights in Major Metropolitan Areas (MMAs). In Other Urban and Rural locations only around one fifth (22% and 20% respectively) of guest nights are attributable to overseas visitors.

## 6 Markets

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

	2004	2005	2006	2007	2008	2009	% Change 2009/2008
Total Overseas	6,780	7,009	7,128	7,289	6,424	6,195	-4
Northern Ireland	839	939	801	862	782	816	4
Republic of Ireland	8,059	8,867	10,272	12,687	13,348	13,061	-2
<b>Total</b>	<b>15,678</b>	<b>16,815</b>	<b>18,201</b>	<b>20,839</b>	<b>20,554</b>	<b>20,072</b>	<b>-2</b>

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

	2004	2005	2006	2007	2008	2009
Britain	18	17	16	15	13	10
Mainland Europe	8	9	9	8	8	10
North America	11	11	11	9	7	8
Rest of World	5	5	3	3	3	3
<b>Total Overseas</b>	<b>43</b>	<b>42</b>	<b>39</b>	<b>35</b>	<b>31</b>	<b>31</b>
Northern Ireland	5	6	4	4	4	4
Republic of Ireland	52	53	56	61	65	65

**Table 6.3 Distribution of Market Guest Nights (%) 2009**

	Jan - Mar	April	May	June	July	Aug	Sept	Oct - Dec
Britain	12	11	11	10	9	9	11	11
Mainland Europe	8	9	11	12	11	13	10	9
North America	5	7	9	11	9	8	10	6
Rest of World	2	2	3	4	3	3	4	3
<b>Total Overseas</b>	<b>27</b>	<b>28</b>	<b>35</b>	<b>36</b>	<b>32</b>	<b>33</b>	<b>35</b>	<b>29</b>
Northern Ireland	4	5	4	3	4	4	4	4
Republic of Ireland	69	67	62	61	64	63	61	67
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

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

- Guestnight demand fell by 2% in 2009, however the number of beds sold is greater than those sold in any year prior to 2007.
- The drop in demand in 2009 was mainly due to the continued deterioration in the overseas market, particularly from Britain.
- There was a significant increase in the absolute number of hotel guest nights from Mainland Europe, which has resulted in a two percentage point increase in the share accounted for by this market.
- Despite an increase in the number of bednights sold to the Northern Irish market, market share has been maintained at 4%, the same level as the three previous years.
- The overseas share of guest nights remained static at 31% in 2009, equal to its lowest level in the past six years, however it brings to an end the continued deterioration which has been evident since 2004.
- While British market share has continued to decline over the past six years, there has, however, been a slight increase in the share of the guest nights represented by North America.
- Although the number of domestic guest nights fell in 2009, the decline was not sufficient to impact market share at 65%.
- While there was a significant decrease in demand from the 'Rest of the World' category, market share at 3% remained unchanged.

## 7 Visitor Attitudes

Chart 1.1 Rating of Hotels on Quality

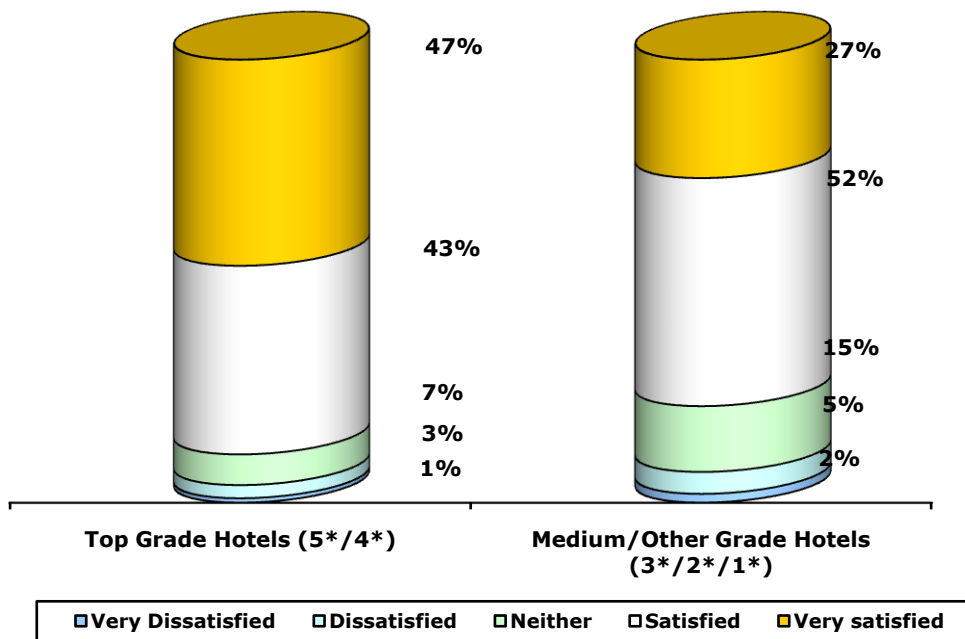
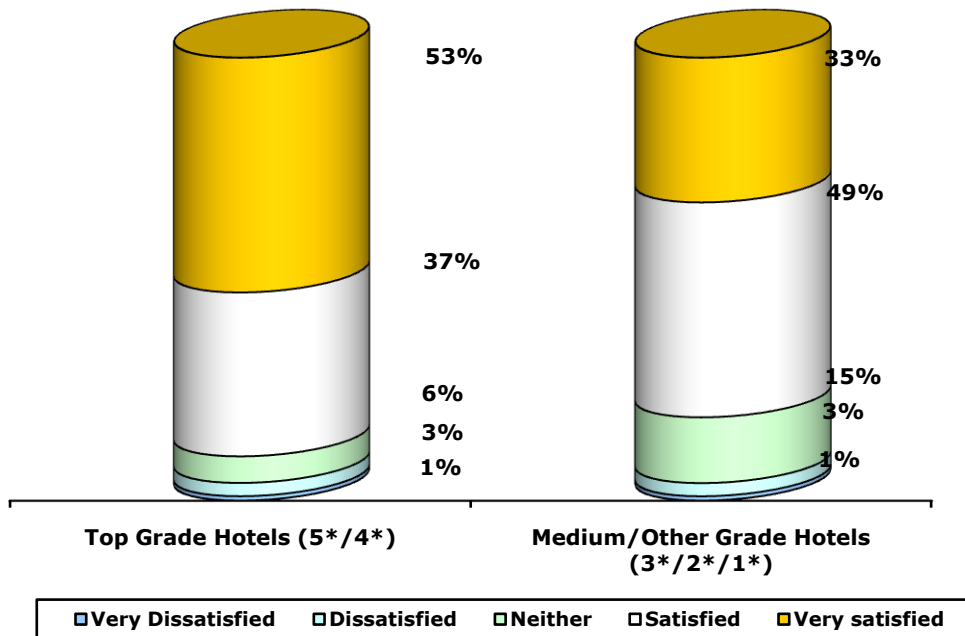
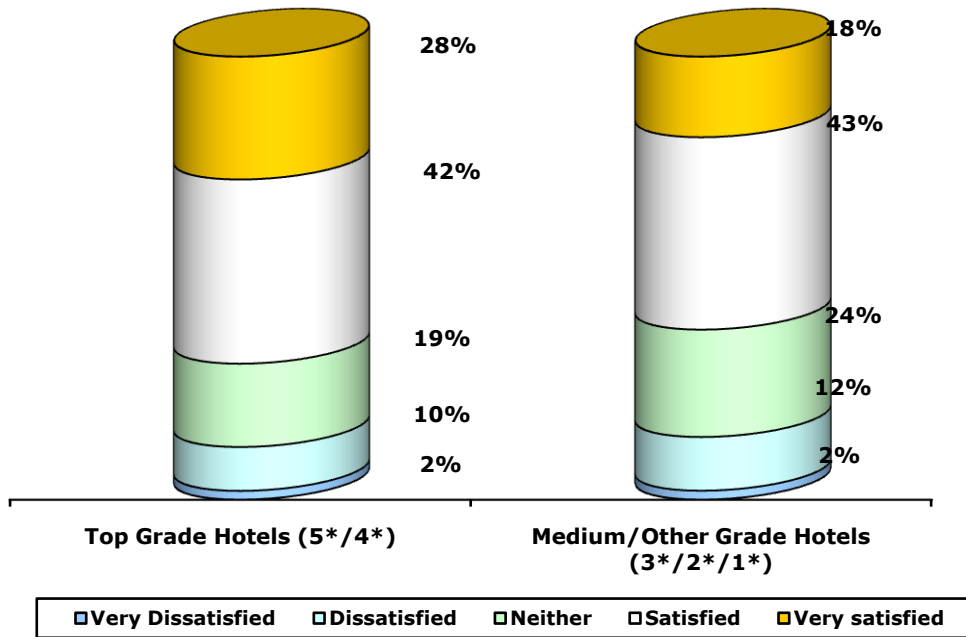


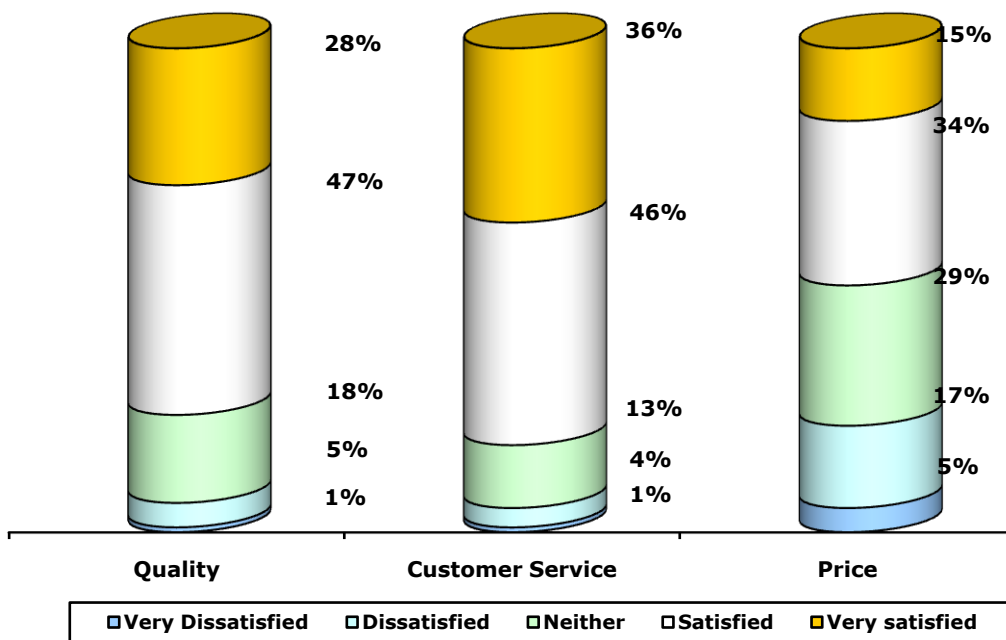
Chart 1.2 Rating of Hotels on Customer Service



**Chart 1.3 Rating of Hotels on Price**



**Chart 1.4 Rating of Food in Hotels**



- Levels of satisfaction for quality and customer service in top grade hotels were high in 2009, 90% of guests stating they were satisfied or very satisfied. Satisfaction with price was rated much lower with 70% satisfaction. However it should be borne in mind that almost two in five nights in Grade 5\* hotels are represented by British and North American guests, markets which were adversely affected by a strong euro in 2009.
- Satisfaction levels for quality and customer service in other hotels were also quite high in 2009, approximately 80% of guests expressing satisfaction, price was again rated much lower (61%).
- Satisfaction levels with food in hotels followed a similar pattern with quality and customer service rated significantly higher than price.

# APPENDICES

## Appendix A – Capacity

**Table 1.1 Registered Bed Capacity in Peak Season (000's)**

	2005	2006	2007	2008	2009	2010	Growth Rate 2010 vs 2009 (%)
Dublin	31.3	35.1	40.4	39.5	41.1	38.2	-7
East and Midlands	9.7	10.8	14.3	15.2	15.6	14.1	-10
South East	10.4	11.0	12.9	13.7	12.3	11.3	-7
South West	20.5	20.9	22.5	24.3	22.7	20.3	-11
Shannon	10.8	10.5	10.8	13.0	11.6	10.9	-6
West	13.6	14.2	15.1	16.6	15.7	14.8	-6
North West	10.0	11.2	11.2	11.9	11.5	11.3	-2
<b>Total</b>	<b>106.2</b>	<b>113.6</b>	<b>127.2</b>	<b>134.2</b>	<b>130.3</b>	<b>120.9</b>	<b>-7</b>

**Table 1.2 Registered Hotel Premises By Grade**

	2005	2006	2007	2008	2009	2010
Grade 5*	20	22	24	<b>30</b>	<b>32</b>	<b>34</b>
Grade 4*	90	100	125	<b>230</b>	<b>246</b>	<b>264</b>
Grade 3*	310	306	321	<b>402</b>	<b>407</b>	<b>401</b>
Grade 2*	180	154	144	<b>176</b>	<b>168</b>	<b>161</b>
Grade 1*	48	36	33	<b>50</b>	<b>43</b>	<b>35</b>
Other	205	196	221	<b>17</b>	<b>19</b>	<b>7</b>
<b>Total</b>	<b>853</b>	<b>814</b>	<b>868</b>	<b>905</b>	<b>915</b>	<b>902</b>

**NOTES:**

A new classification system was introduced in 2008 so direct comparisons with the years 2005-2007 are not advisable. Other hotels include hotels awaiting registration, hotels under refurbishment and hotels for which classification is under review.

**Table 1.3 Hotel Beds and Rooms by Grade 2010**

	<b>Rooms</b>	<b>Beds</b>
Grade 5*	3,893	7,804
Grade 4*	24,630	49,690
Grade 3*	27,622	55,344
Grade 2*	3,433	6,784
Grade 1*	500	972
Other	139	269
<b>Total</b>	<b>60,217</b>	<b>120,863</b>

## Appendix B – Demand

**Table 2.1 Bednights (000's)**

	2004	2005	2006	2007	2008	2009
Bednights Capacity	35,980	36,896	39,347	44,852	48,227	47,797
Bednights Sold	15,678	16,815	18,201	20,839	20,554	20,072
Bed Occupancy (%)	44	46	46	46	43	42

**Table 2.2 Roomnights (000's)**

	2004	2005	2006	2007	2008	2009
Roomnights Capacity	15,445	15,842	16,707	19,273	21,019	21,668
Roomnights Sold	9,243	9,795	10,685	12,284	12,294	11,888
Room Occupancy (%)	60	62	64	64	58	55

**Table 2.3 Timing of Demand – Bednights Sold (000's)**

	2004	2005	2006	2007	2008	2009
January–March	2,974	3,047	3,431	3,832	4,001	3,760
April	1,359	1,436	1,602	1,743	1,617	1,616
May	1,445	1,518	1,587	1,850	1,937	1,800
June	1,531	1,735	1,749	2,043	1,928	1,881
July	1,758	1,861	1,967	2,285	2,308	2,257
August	1,848	1,977	2,159	2,496	2,450	2,577
September	1,463	1,626	1,714	2,069	1,885	1,863
October–December	3,300	3,614	3,993	4,520	4,427	4,319
<b>Total</b>	<b>15,678</b>	<b>16,815</b>	<b>18,201</b>	<b>20,839</b>	<b>20,554</b>	<b>20,072</b>

**Table 2.4 Timing of Demand – Roomnights Sold (000's)**

	2004	2005	2006	2007	2008	2009
January–March	1,767	1,840	2,103	2,371	2,462	2,322
April	766	844	922	1,044	1,021	933
May	854	896	981	1,140	1,146	1,097
June	924	971	1,034	1,240	1,158	1,124
July	987	1,030	1,078	1,282	1,302	1,277
August	988	1,057	1,141	1,304	1,356	1,377
September	905	979	1,029	1,239	1,172	1,138
October–December	2,052	2,176	2,397	2,665	2,677	2,618
<b>Total</b>	<b>9,243</b>	<b>9,795</b>	<b>10,685</b>	<b>12,284</b>	<b>12,294</b>	<b>11,888</b>

**Table 2.5 Monthly Room Occupancy Rates (%)**

	2004	2005	2006	2007	2008	2009
January	40	41	46	44	43	39
February	51	53	55	54	48	46
March	52	55	59	56	53	47
April	59	62	67	65	58	52
May	63	64	67	67	63	58
June	70	72	73	76	65	62
July	73	73	73	76	71	68
August	73	75	77	77	74	73
September	69	72	74	76	66	62
October	64	63	64	66	61	59
November	54	56	57	55	49	45
December	45	48	51	47	46	44
<b>Total</b>	<b>60</b>	<b>62</b>	<b>64</b>	<b>64</b>	<b>58</b>	<b>55</b>

**Table 2.6 Monthly Bed Occupancy Rates (%)**

	2004	2005	2006	2007	2008	2009
January	29	27	31	30	29	28
February	37	36	39	38	34	34
March	38	42	40	40	39	35
April	45	45	49	46	40	40
May	46	47	46	47	46	43
June	50	55	52	54	47	47
July	56	57	57	58	55	54
August	58	60	62	63	58	62
September	48	51	53	54	46	46
October	45	45	46	46	43	45
November	36	40	39	41	34	32
December	31	35	38	34	36	33
<b>Total</b>	<b>44</b>	<b>46</b>	<b>46</b>	<b>46</b>	<b>43</b>	<b>42</b>

## Appendix C - Grade

**Table 3.1 Bed Occupancy – By Grade 2009 (%)**

	All	Grade 5*	Grade 4*	Grade 3*	Grade 2* and 1*
January–March	32	33	34	32	24
April	40	42	42	41	26
May	43	39	45	44	29
June	47	43	50	47	29
July	54	50	59	54	36
August	62	58	65	63	40
September	46	44	49	46	31
October–December	37	37	39	37	25
<b>Total</b>	<b>42</b>	<b>41</b>	<b>44</b>	<b>42</b>	<b>28</b>

**Table 3.2 Distribution of Market Guestnights by Grade 2009 (%)**

	Grade 5*	Grade 4*	Grade 3*	Grade 2* and 1*	Total
Britain	8	31	55	6	100
Mainland Europe	5	28	60	7	100
North America	20	39	39	3	100
Rest of World	9	25	61	5	100
Northern Ireland	3	36	56	6	100
Republic of Ireland	5	47	44	4	100

## Appendix D – Regions

**Table 4.1 Room Occupancy By Region (%)**

	2004	2005	2006	2007	2008	2009
Dublin	69	71	72	72	66	62
South East	58	55	60	57	56	56
South West	62*	63	67	66	58	58
Shannon	57*	60	63	61	58	50
West	54	57	59	60	59	56
North West	51	54	56	57	51	46
East & Midlands	50	53	54	54	46	40
<b>Total</b>	<b>60</b>	<b>62</b>	<b>64</b>	<b>64</b>	<b>58</b>	<b>55</b>

\* 2004 data is not directly comparable with recent years due to boundary changes.

**Table 4.2 Bed Occupancy By Region (%)**

	2004	2005	2006	2007	2008	2009
Dublin	49	51	51	53	47	45
South East	42	40	42	41	42	45
South West	46*	49	52	48	41	45
Shannon	42*	43	44	41	42	40
West	39	44	43	46	48	46
North West	39	39	41	44	37	35
East & Midlands	36	37	38	36	31	29
<b>Total</b>	<b>44</b>	<b>46</b>	<b>46</b>	<b>46</b>	<b>43</b>	<b>42</b>

\* 2004 data is not directly comparable with recent years due to boundary change

**Table 4.3 Bed Occupancy By Region 2009 (%)**

	Total	Dublin	South East	South West	Shannon	West	North West	East and Midlands
<b>Year</b>	<b>42</b>	<b>45</b>	<b>45</b>	<b>45</b>	<b>40</b>	<b>46</b>	<b>35</b>	<b>29</b>
January–March	32	36	33	36	31	33	25	22
April	40	42	46	42	40	45	36	29
May	43	46	50	44	44	46	36	33
June	47	49	51	51	46	52	42	30
July	54	54	60	62	52	68	45	34
August	62	61	66	72	60	74	55	42
September	46	51	46	50	42	50	38	35
October–December	37	43	38	36	34	36	30	28

## Appendix E – Grade within Region

**Table 5.1 Bed Occupancy Rates Grade within Region 2009 (%)**

	Total	Grade 4* and 5*	Grade 3*	Grade 2* and 1*
Dublin	45	44	47	41
East & Midlands	29	31	30	16
South East	45	58	36	30
South West	45	46	46	34
Shannon	40	47	41	19
West	46	49	45	31
North West	34	41	34	12

**Table 5.2 Room Occupancy Rates Grade within Region 2009 (%)**

	Total	Grade 4* and 5*	Grade 3*	Grade 2* and 1*
Dublin	62	60	64	56
East & Midlands	40	42	41	23
South East	56	68	48	35
South West	58	57	59	48
Shannon	50	49	54	26
West	56	62	54	43
North West	45	56	43	16

## Appendix F – Hotel Size

**Table 6.1 Room Occupancy By Hotel Size (%)**

	2004	2005	2006	2007	2008	2009
1-20 Rooms	39	39	46	44	46	42
21-49 Rooms	52	55	55	56	55	51
50-99 Rooms	62	63	61	59	58	54
100+ Rooms	66	68	70	72	61	58
<b>Total</b>	<b>60</b>	<b>62</b>	<b>63</b>	<b>64</b>	<b>58</b>	<b>55</b>

**Table 6.2 Bed Occupancy By Hotel Size (%)**

	2004	2005	2006	2007	2008	2009
1-20 Rooms	29	29	32	31	33	32
21-49 Rooms	40	41	41	42	40	39
50-99 Rooms	45	46	45	42	43	42
100+ Rooms	47	50	49	50	44	44
<b>Total</b>	<b>44</b>	<b>46</b>	<b>45</b>	<b>46</b>	<b>43</b>	<b>42</b>

**Table 6.3 Bed Occupancy By Hotel Size 2009 (%)**

	Total	1-20 Rooms	21-49 Rooms	50-99 Rooms	100+ Rooms
January – March	32	24	30	32	34
April	40	31	38	41	42
May	43	34	41	44	45
June	47	35	44	47	48
July	54	42	52	55	55
August	62	48	59	64	63
September	46	36	43	46	48
October–December	37	28	34	36	39
<b>Year</b>	<b>42</b>	<b>32</b>	<b>39</b>	<b>42</b>	<b>44</b>

**Table 6.4 Distribution of Guestnights by Market Area by Hotel Size 2009 (%)**

	1-20 Rooms	21-49 Rooms	50-99 Rooms	100+ Rooms
Britain	9	10	9	12
Mainland Europe	8	9	8	12
North America	5	6	7	8
Rest of World	2	2	2	3
Northern Ireland	6	6	5	3
Republic of Ireland	69	67	70	62
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

## Appendix G – Location

**Table 7.1 Room Occupancy By Location (%)**

	2004	2005	2006	2007	2008	2009
MMA	65	68	68	70	64	60
Other Urban	61	64	64	62	55	51
Rural	53	53	58	59	54	50
<b>Total</b>	<b>60</b>	<b>62</b>	<b>64</b>	<b>64</b>	<b>58</b>	<b>55</b>

**Table 7.2 Bed Occupancy By Location (%)**

	2004	2005	2006	2007	2008	2009
MMA	45	49	47	48	46	45
Other Urban	47	49	47	45	39	40
Rural	40	40	43	44	40	40
<b>Total</b>	<b>44</b>	<b>46</b>	<b>46</b>	<b>46</b>	<b>43</b>	<b>42</b>

**Table 7.3 Bed Occupancy By Location 2009 (%)**

	MMA	Other Urban	Rural
January – March	35	31	29
April	42	38	39
May	45	41	42
June	49	45	45
July	56	52	53
August	63	61	61
September	50	44	43
October – December	41	34	34
<b>Total</b>	<b>45</b>	<b>40</b>	<b>40</b>

## Appendix H – Markets

**Table 8.1 Seasonality of Guestnights within Market Area 2009 (%)**

	January- March	April	May	June	July	August	September	October- December	Total
Britain	21	8	9	9	10	11	10	22	100
Mainland Europe	15	7	10	11	12	16	9	20	100
North America	12	7	11	13	14	14	12	16	100
Rest of World	15	6	11	12	11	12	13	20	100
Northern Ireland	20	9	8	8	11	14	8	22	100
Rep. of Ireland	20	8	9	9	11	12	9	22	100

## Appendix I – Hotel Stock by Region 2010

**Table 9.1 Dublin**

	Premises	Rooms	Beds
Grade 5*	9	1,492	2,993
Grade 4*	43	7,755	15,557
Grade 3*	75	8,892	17,568
Grade 2*	25	901	1,801
Grade 1*	4	99	173
Other	3	46	90
<b>Total</b>	<b>159</b>	<b>19,185</b>	<b>38,182</b>

**Table 9.2 South East**

	Premises	Rooms	Beds
Grade 5*	3	246	502
Grade 4*	35	2,436	4,803
Grade 3*	47	2,571	5,266
Grade 2*	17	248	467
Grade 1*	9	124	242
<b>Total</b>	<b>111</b>	<b>5,625</b>	<b>11,280</b>

**Table 9.3 South West**

	Premises	Rooms	Beds
Grade 5*	11	1,067	2,077
Grade 4*	52	4,145	8,346
Grade 3*	70	4,562	8,822
Grade 2*	25	470	918
Grade 1*	4	44	82
Other	1	15	25
<b>Total</b>	<b>163</b>	<b>10,303</b>	<b>20,270</b>

**Table 9.4 Shannon**

	Premises	Rooms	Beds
Grade 5*	3	254	568
Grade 4*	24	1,540	3,125
Grade 3*	44	3,048	6,226
Grade 2*	17	507	1,030
Grade 1*	2	22	48
<b>Total</b>	<b>90</b>	<b>5,371</b>	<b>10,997</b>

**Table 9.5 West**

	Premises	Rooms	Beds
Grade 5*	3	227	454
Grade 4*	39	2,752	5,516
Grade 3*	66	3,685	7,599
Grade 2*	27	446	890
Grade 1*	9	117	236
Other	1	51	100
<b>Total</b>	<b>145</b>	<b>7,278</b>	<b>14,795</b>

**Table 9.6 North West**

	Premises	Rooms	Beds
Grade 5*	1	95	190
Grade 4*	32	2,455	5,053
Grade 3*	47	2,473	5,061
Grade 2*	24	425	818
Grade 1*	4	48	93
Other	2	27	54
<b>Total</b>	<b>110</b>	<b>5,523</b>	<b>11,269</b>

**Table 9.7 East & Midlands**

	Premises	Rooms	Beds
Grade 5*	4	512	1,020
Grade 4*	39	3,547	7,290
Grade 3*	52	2,391	4,802
Grade 2*	26	436	860
Grade 1*	3	46	98
<b>Total</b>	<b>124</b>	<b>6,932</b>	<b>14,070</b>

## Appendix J–Hotel Stock by County 2010

**Table 10.1 Hotel Stock by County 2010**

County	Premises	Rooms
Carlow	9	525
Cavan	17	841
Clare	47	2,517
Cork	82	4,694
Donegal	61	3,023
Dublin	159	19,185
Galway	89	4,773
Kerry	81	5,609
Kildare	25	1,242
Kilkenny	18	1,168
Laois	9	510
Leitrim	7	265
Limerick	30	2,364
Longford	4	111
Louth	15	898
Mayo	52	2,335
Meath	22	1,278
Monaghan	9	341
Offaly	8	385
Roscommon	4	170
Sligo	16	1,053
Tipperary	28	912
Waterford	31	1,696
Westmeath	19	1,244
Wexford	34	1,675
Wicklow	26	1,403
<b>Total</b>	<b>902</b>	<b>60,217</b>

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## 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 2009 the panel size fluctuated, with an average of 232 hotels participating in any given month (maximum of 244 and minimum of 204). Each hotel undertook to provide monthly information as to the number of room and bed nights sold. We achieved an annual response rate of 72% 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 78%, while the minimum response rate achieved was 68%. The current weighting is three dimensional; by month, grade, and region.

The panel results were grossed up to the national hotel room and bed stock to provide national results. Capacity information has been drawn from the Gulliver System and, more recently, TAMS between January and March. During 2009 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 Visitor Attitudes Survey provides information on holidaymakers' experiences regarding their usage of hotels while in Ireland. The methodology with regard to holidaymakers' satisfaction levels changed in the 2009 survey and therefore comparisons with previous years are not recommended.

### 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 Fáilte Ireland's Tourism Regions.

#### Dublin

- Dublin County

#### 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.

### **East & Midlands**

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

### **Classification**

A new classification system was introduced in 2008 so direct comparisons with previous years 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.