Fáilte Ireland
Hotel Review 2010

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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 2010, and also draws comparisons with recent years. The Review of Hotel Performance in 2010 also presents highlights of the Visitor Attitude Survey 2010 which are pertinent to the hotel industry. A capacity update for 2011 is also included in this report.

The following Summary highlights the key points emerging from the 2010 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

- Hotels experienced a slight decline in bed occupancy in 2010, while room occupancy remained static. This decrease in bednight demand was driven by weak performance across all the main markets.

Capacity[1] and Demand

- The decreases in capacity across many regions, coupled with falling demand in 2010, resulted in a slight fall in bed occupancy (42% in 2009 and 41% in 2010) and a static room occupancy rate (56% in 2009 and 56% in 2010).
- There was an increase in registered room capacity in the North West region in 2011, however decreases in all the other regions have resulted in a 1 percentage point decrease overall.
- Following several years of expansion, registered room capacity declined at national level between 2010 and 2011.

Grade

- Grade 3* hotels experienced the highest occupancy rates in 2010.
- More than half (51%) of all bednight sales in Grade 5* hotels are attributable to overseas visitors, with North American (25%) and British (13%) guests being most prevalent.

Regions

- Room occupancy rates have increased in two of the seven regions with the North West and East & Midlands increasing by 3 and 2 percentage points respectively. Dublin, the West, the South East and the South West regions all experienced a fall in room occupancy.
- Despite only accounting for 30% of the total market at a national level, overseas visitors account for almost half (45%) of all bednights sold in Dublin during 2010.
- The domestic market is very important in the West, South East and East & Midlands regions where it accounts for more than three quarters of all bednights sold. Northern Ireland is also very important to the North West where it accounts for more than a quarter (26%) of all bednight sales.

Hotel Size

- Large hotels (100+ rooms) experienced a 2 percentage point decrease in room occupancy rates, falling to their lowest level in six years. However, small hotels (1-20 rooms) experienced a 2 percentage point increase in room occupancy rates.
- All other size category of hotels (those with 21-49 rooms and those with 50-99 rooms) experienced static annual room occupancy rates.
- Overseas visitors were most prevalent in large hotels (100+ rooms) accounting for one third (33%) of all guests in this category.

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[1] 2009 bed capacity has been revised.

Location

- Overseas visitors accounted for 39% of all hotel nights in Major Metropolitan Areas (MMAs). In Other Urban and Rural locations only around one fifth (23% and 21% respectively) of guest nights are attributable to overseas visitors.

Markets

- Guestnight demand decreased by 2% in 2010 and the number of beds sold is the lowest since 2006.
- The decrease in demand in 2010 was mainly due to the decreases across most markets, except Northern Ireland.
- For the third year running the Republic of Ireland's market share remains at 65%.
- Overseas market share has dipped to 30%, the lowest it has been over the past six years.

1 Capacity and Demand

Table 1.1 Number of Registered Hotels

	2006	2007	2008	2009	2010	2011	Growth Rate 2011 vs 2010
Dublin	137	151	154	160	159	157	**-1**
East & Midlands	108	118	124	130	124	119	**-4**
South East	102	108	112	112	111	105	**-5**
South West	158	161	163	166	163	161	**-1**
Shannon	77	85	90	92	90	88	**-2**
West	127	140	144	148	145	141	**-3**
North West	105	105	107	107	110	112	**+2**
TOTAL	**814**	**868**	**894**	**915**	**902**	**883**	**-2**

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

	2006	2007	2008	2009	2010	2011	Growth Rate 2011 vs 2010
Dublin	15.2	16.6	18.6	19.1	19.2	18.9	**-2**
East & Midlands	4.8	6.3	6.7	7.1	6.9	6.8	**-1**
South East	4.5	5.4	5.6	5.6	5.6	5.4	**-4**
South West	8.9	9.6	10.6	10.4	10.3	10.1	**-2**
Shannon	4.4	4.7	5.5	5.4	5.4	5.3	**-2**
West	5.8	6.5	6.8	7.1	7.3	7.2	**-1**
North West	4.7	5.0	5.2	5.3	5.5	5.6	**+2**
	48.3	**54.1**	**59.0**	**60.0**	**60.2**	**59.3**	

Table 1.3 Average Hotel Occupancy Rates (%)

	2005	2006	2007	2008	2009	2010
Bed Occupancy	46	46	46	43	42	41
Room Occupancy	62	64	64	58	56	56

- In 2011, the growth in registered hotels slowed for the second consecutive year, dropping by 2% nationally.
- There was an increase in registered room capacity in the North West region in 2011, however decreases in all the other regions has resulted in a 1% decrease overall.
- Following several years of expansion, registered room capacity declined at national level between 2009 and 2010.
- The decreases in capacity across all regions, with the exception of the North West, coupled with falling demand in 2010, resulted in a slight fall in bed occupancy and static room occupancy rate.

2 Grade

2.1 Capacity and Demand (000's)

	5*	4*	3*	2* & 1* [1]
Bed Capacity				
2009	2,952	19,611	24,228	3,375
2010	3,028	20,542	23,463	2,922
Year on Year Change (%)	+3%	+5%	-3%	-13%
Bed Nights Sold				
2009	1,210	8,359	10,422	914
2010	1,322	8,218	9,995	858
Year on Year Change (%)	+9%	-2%	-4%	-6%
Room Capacity				
2009	1,315	8,387	10,041	1,481
2010	1,354	8,803	9,649	1,304
Year on Year Change (%)	+3%	+5%	-1%	-12%
Room Nights Sold				
2009	707	4,863	5,794	587
2010	765	4,855	5,589	547
Year on Year Change (%)	+8%	*	-4%	-7%

[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 2010 (%)

	5*	4*	3*	2* & 1*
Britain	13	7	13	12
Mainland Europe	8	5	14	13
North America	25	5	7	3
Rest of World	6	2	3	5
Total Overseas	**51**	**19**	**37**	**33**
Northern Ireland	2	4	5	5
Republic of Ireland	47	77	58	62
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 2010 (%)

	All	5*	4*	3*	2*&1*
Jan-Mar	44	42	44	45	34
April	54	46	57	55	40
May	59	53	58	62	44
June	63	64	60	69	48
July	68	68	67	71	48
August	73	74	72	76	53
September	67	70	69	68	46
Oct-Dec	50	58	48	51	40
Total	56	56	55	58	42

Table 2.4 Room Occupancy – By Grade (%)

	2008	2009	2010
Grade 5*	58	54	56
Grade 4*	59	58	55
Grade 3*	61	58	58
Grade 1* and 2*	43	40	42
Total	58	56	56

- Grade 3* hotels experienced the highest occupancy rates throughout 2010 and remain unchanged compared to 2009.
- Grade 1* and 2* hotels performed poorly only achieving 42% occupancy in 2010, however this is an improvement on the bed occupancy rate recorded for 2009.
- Grade 4* hotels have experienced a drop in room occupancy rates for the third year in succession and Grade 5* have experienced some recovery from the drop in 2009.
- More than half (51%) of all bednight sales in Grade 5* hotels are attributable to overseas visitors, with North American (25%) and British (13%) guests being most prevalent.
- Domestic visitors made up the majority of bednights across all other grades, accounting for more than three quarters (77%) 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							
2010	16,116	5,839	4,821	8,335	4,313	6,188	4,445
2009	16,005	6,017	4,828	8,588	4,457	6,076	4,301
Year on Year Change	*+1%*	*-3%*	*Nc*	*-3%*	*-3%*	*+2%*	*+3%*
Bed Nights Sold							
2010	7,024	1,604	2,008	3,820	1,651	2,545	1,781
2009	7,402	1,685	2,011	4,040	1,657	2,576	1,579
Year on Year Change	*-5%*	*-5%*	*Nc*	*-5%*	*nc*	*-1%*	*+13%*
Room Capacity							
2010	6,877	2,489	1,981	3,491	1,841	2,550	1,931
2009	6,864	2,568	1,987	3,580	1,896	2,520	1,861
Year on Year Change	*nc*	*-3%*	*Nc*	*-2%*	*-3%*	*+1%*	*+4%*
Room Nights Sold							
2010	4,256	1,048	1,137	2,013	947	1,418	965
2009	4,339	1,038	1,150	2,178	976	1,427	871
Year on Year Change	***-2%***	***+1%***	***-1%***	***-8%***	***-3%***	***-1%***	*+11%*

Table 3.2 Room Occupancy – by Region 2010 (%)

	Total	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Year	56	62	42	57	58	51	56	50
Jan-Mar	44	52	31	43	44	39	40	40
April	54	58	41	67	53	51	54	53
May	59	63	44	60	64	55	61	50
June	63	68	45	58	73	62	67	55
July	68	68	51	75	75	62	74	65
August	73	74	55	81	80	65	82	67
September	67	76	56	68	69	57	65	58
Oct-Dec	50	60	39	48	45	47	46	43

Table 3.3 Distribution of Regional Guest Nights by Market Area 2010 (%)

	Total	Dublin	East & Midlands	South East	South West	Shannon	West	North West
Britain	11	16	8	7	10	8	5	11
Mainland Europe	10	16	4	3	7	14	6	3
North America	7	9	3	5	9	8	7	3
Rest of World	3	4	2	1	2	2	1	1
Total Overseas	**30**	**45**	**18**	**15**	**27**	**32**	**20**	**18**
Northern Ireland	5	3	5	1	3	1	3	26
Republic of Ireland	65	52	77	84	70	68	77	57
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 (%)

	2005	2006	2007	2008	2009	2010
Dublin	71	72	72	66	63	62
East & Midlands	53	54	54	46	40	42
South East	55	60	57	56	58	57
South West	63	67	66	58	61	58
Shannon	60	63	61	58	51	51
West	57	59	60	59	57	56
North West	54	56	57	51	47	50

- Demand in the North West has outstripped supply resulting in a 3 percentage point increase in room occupancy rates for 2010.
- Room occupancy rates in Shannon have remained static.
- Dublin, the West, the South East and the South West experienced a fall in room occupancy meaning that they all, with the exception of the South East, remain at their lowest occupancy levels achieved over the last six years.
- Although the overseas market only accounts for 30% of total bednights sold, almost half (45%) of all bednights sold in Dublin were attributable to overseas visitors.
- Visitors from Northern Ireland accounted for between 1% and 5% of bednights sold in all regions, with the exception of the North West, where more than a quarter (26%) of total bednight sales are attributable to this market.
- The domestic market accounted for more than three quarters of all bednights sold in the South East, West and East & Midlands regions. Dublin is the least dependent region on this market with just over half (52%) of all guestnights attributable to the Irish market.

4 Hotel Size

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

	1 - 20 Rooms	21 – 49 Rooms	50 – 99 Rooms	100+ Rooms
Bed Capacity				
2010	2,273	6,787	14,136	26,861
2009	2,392	7,018	14,417	26,446
Year on Year Change	*-5%*	*-3%*	*-2%*	*+2%*
Bed Nights Sold				
2010	757	2,667	5,806	11,204
2009	752	2,739	5,917	11,542
Year on Year Change	*+1%*	*-3%*	*-2%*	*-3%*
Room Capacity				
2010	1,036	2,867	5,890	11,367
2009	1,086	2,957	6,004	11,229
Year on Year Change	*-5%*	*-3%*	*-2%*	*+1%*
Room Nights Sold				
2010	468	1,525	3,261	6,531
2009	465	1,561	3,320	6,632
Year on Year Change	*+1%*	*-2%*	*-2%*	*-2%*

Table 4.2 Room Occupancy – by Room Size 2010 (%)

	Total	1 - 20 Rooms	21 – 49 Rooms	50 – 99 Rooms	100+ Rooms
Year	56	45	53	55	57
Jan – Mar	44	34	41	43	46
April	54	43	53	55	55
May	59	48	57	58	60
June	63	51	62	63	65
July	68	56	66	69	69
August	73	60	71	75	74
September	67	51	63	67	70
Oct – Dec	50	40	46	48	52

Table 4.3 Distribution of Guest Nights by Market Area, by Room Size 2010 (%)

	Total	1 - 20 Rooms	21 – 49 Rooms	50 – 99 Rooms	100+ Rooms
Britain	11	9	10	9	12
Mainland Europe	10	8	9	8	11
North America	7	4	6	7	8
Rest of World	3	2	2	2	3
Total Overseas	**30**	**24**	**27**	**26**	**33**
Northern Ireland	5	5	7	5	4
Republic of Ireland	65	71	66	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

	2005	2006	2007	2008	2009	2010
1 - 20 Rooms	39	46	44	46	43	45
21 – 49 Rooms	55	55	56	55	53	53
50 – 99 Rooms	63	61	59	58	55	55
100+ Rooms	68	70	72	61	59	57

- Demand for rooms in hotels with 21-49 rooms decreased by 2% although supply also decreased by 3%. For hotels with 50-99 rooms, the total number of rooms available also decreased at a similar rate to demand. This resulted in static room occupancy rates for hotels with 21-49 rooms and 50-99 rooms.
- Demand for rooms in hotels with 1-20 rooms increased by 1% however supply actually decreased by 5%. This resulted in a 2 percentage point increase in occupancy rates for hotels with 1-20 rooms.
- A slight increase in supply coupled with a decreasing demand resulted in the overall decrease in occupancy rates for the large hotels (100+ rooms) in 2010.
- The large hotels (100+ rooms) had the highest proportion of overseas visitors (33%), with Britain (12%) and mainland Europe (11%) 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			
2010	23,315	8,416	18,325
2009	23,216	8,511	18,546
Year on Year Change	*nc*	*-1%*	*-1%*
Bed Nights Sold			
2010	9,977	3,296	7,160
2009	10,368	3,409	7,172
Year on Year Change	*-4%*	*-3%*	*nc*
Room Capacity			
2010	9,900	3,473	7,787
2009	9,894	3,530	7,853
Year on Year Change	*nc*	*-2%*	*-1%*
Room Nights Sold			
2010	5,907	1,817	4,060
2009	6,023	1,885	4,070
Year on Year Change	*-2%*	*-4%*	*nc*

Table 5.2 Room Occupancy – by Location 2010 (%)

	Total	MMA	Other Urban	Rural
Year	56	60	52	52
Jan – Mar	44	49	40	39
April	54	56	51	53
May	59	62	57	55
June	63	67	62	59
July	68	69	67	67
August	73	75	71	71
September	67	73	64	62
Oct – Dec	**50**	**55**	**43**	45

Table 5.3 Distribution of Guest Nights by Market Area, by Location 2010 (%)

	All	MMA	Other Urban	Rural
Britain	11	13	9	8
Mainland Europe	10	14	6	6
North America	7	9	6	6
Rest of World	3	4	2	1
Total Overseas	**30**	**39**	**23**	**21**
Northern Ireland	5	3	5	8
Republic of Ireland	65	58	73	71
Total	100	100	100	100

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

Table 5.4 Room Occupancy (%) by Location

	2005	2006	2007	2008	2009	2010
MMA	68	68	70	64	61	60
Other Urban	64	64	62	55	53	52
Rural	53	58	59	54	52	52

- The static room occupancy in Rural hotels is due to a slight decrease in supply of rooms (-1%) coupled with a static demand for rooms in these areas.
- The 1% decrease in room occupancy in Other Urban Areas is due to a decreasing supply of rooms (-2%) coupled with a much bigger decrease in demand (-4%) for rooms in these areas.
- Major Metropolitan Areas (MMAs) experienced a static supply of rooms, but falling demand which resulted in an overall decrease of 1 percentage point in room occupancy.
- Overseas visitors accounted for 39% of all hotel nights in Major Metropolitan Areas (MMAs). In Other Urban and Rural locations only around one fifth (23% and 21% respectively) of guest nights are attributable to overseas visitors.

6 Markets

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

	2005	2006	2007	2008	2009	2010	% Change 2010/2009
Britain	2,817	2,975	3,120	2,753	2,238	2,184	**-2**
Mainland Europe	1,520	1,629	1,718	1,568	2,151	1,990	**-7**
North America	1,845	1,978	1,818	1,424	1,569	1,468	**-6**
Rest of World	827	545	634	679	590	516	**-13**
Total Overseas	**7,009**	**7,128**	**7,289**	**6,424**	**6,549**	**6,159**	**-6**
Northern Ireland	939	801	862	782	863	961	**+11**
Republic of Ireland	8,867	10,272	12,687	13,348	13,537	13,314	**-2**
Total	16,815	18,201	20,839	20,554	20,949	20,433	-2

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

	2005	2006	2007	2008	2009	2010
Britain	17	16	15	13	11	11
Mainland Europe	9	9	8	8	10	10
North America	11	11	9	7	7	7
Rest of World	5	3	3	3	3	3
Total Overseas	**42**	**39**	**35**	**31**	**31**	**30**
Northern Ireland	6	4	4	4	4	5
Republic of Ireland	53	56	61	65	65	65

Table 6.3 Distribution of Market Guest Nights (%) 2010

	Jan - Mar	April	May	June	July	Aug	Sept	Oct - Dec
Britain	12	11	11	10	9	9	12	10
Mainland Europe	8	9	12	12	12	12	9	7
North America	5	5	8	10	9	8	11	5
Rest of World	2	2	3	3	3	3	3	2
Total Overseas	**27**	**28**	**35**	**35**	**32**	**32**	**35**	**25**
Northern Ireland	4	5	4	4	5	5	4	6
Republic of Ireland	69	67	61	61	63	64	60	69
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 decreased by 2% in 2010 and the number of beds sold is the lowest since 2006.
- The decrease in demand in 2010 was mainly due to the decreases across the markets, with the exception of Northern Ireland.
- There has been a 6% decrease in all overseas markets, driven mainly by a drop in demand from North American and Mainland Europe.
- The overseas share of guest nights has dipped to 30% in 2010, its lowest level in the past six years.
- The number of domestic guest nights slightly decreased in 2010 but due to the big base size the decrease was not sufficient enough to impact market share which remained at 65% for the third year in a row.
- There has been a big decrease (-13%) in demand from the 'Rest of the World' category; however, as this was from a small base there remains enough to maintain market share at 3%.

7 Visitor Attitudes

Chart 1.1 Rating of Hotels on Quality

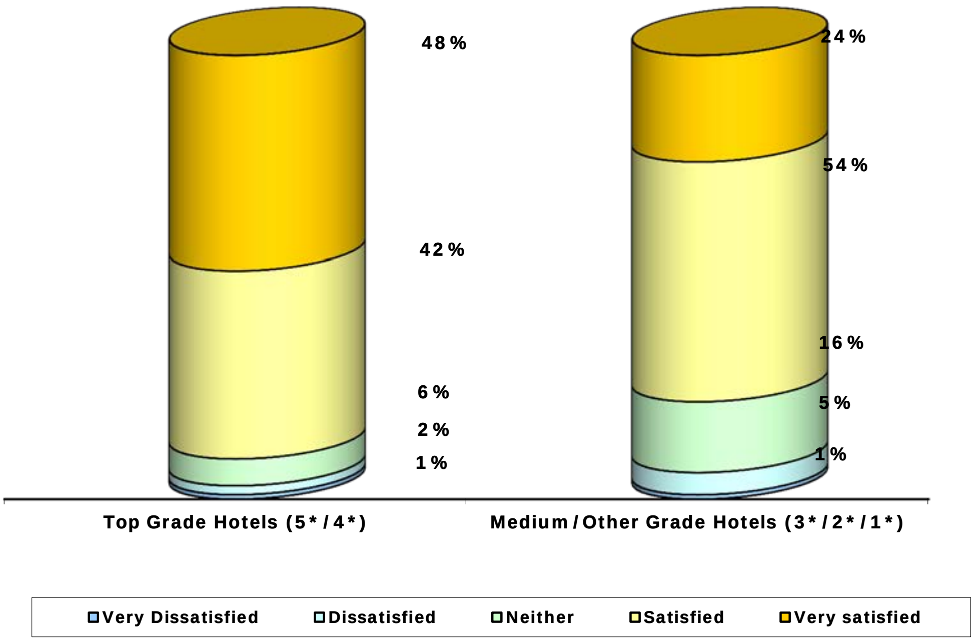


Chart 1.2 Rating of Hotels on Customer Service

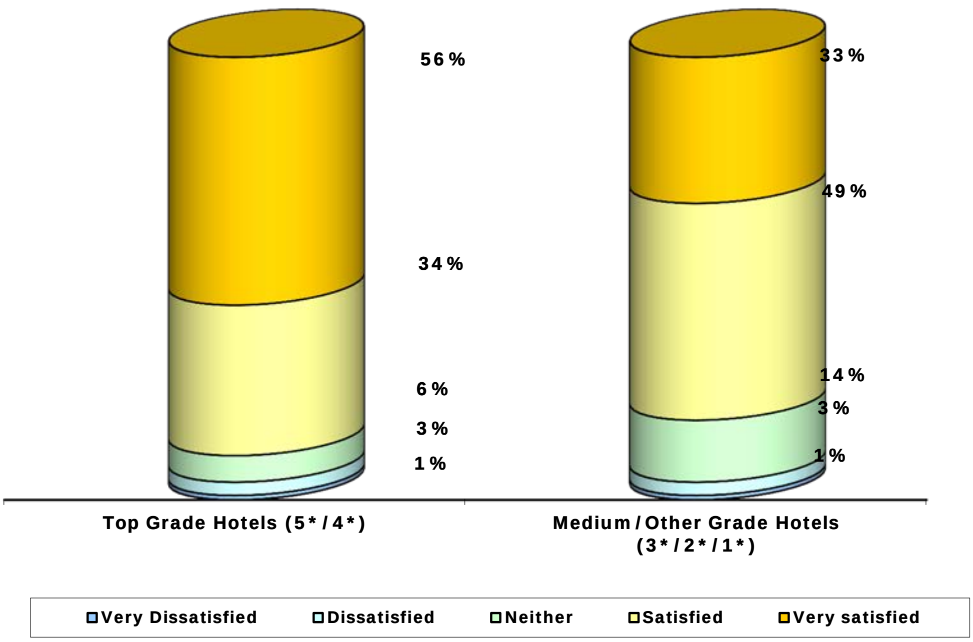


Chart 1.3 Rating of Hotels on Price

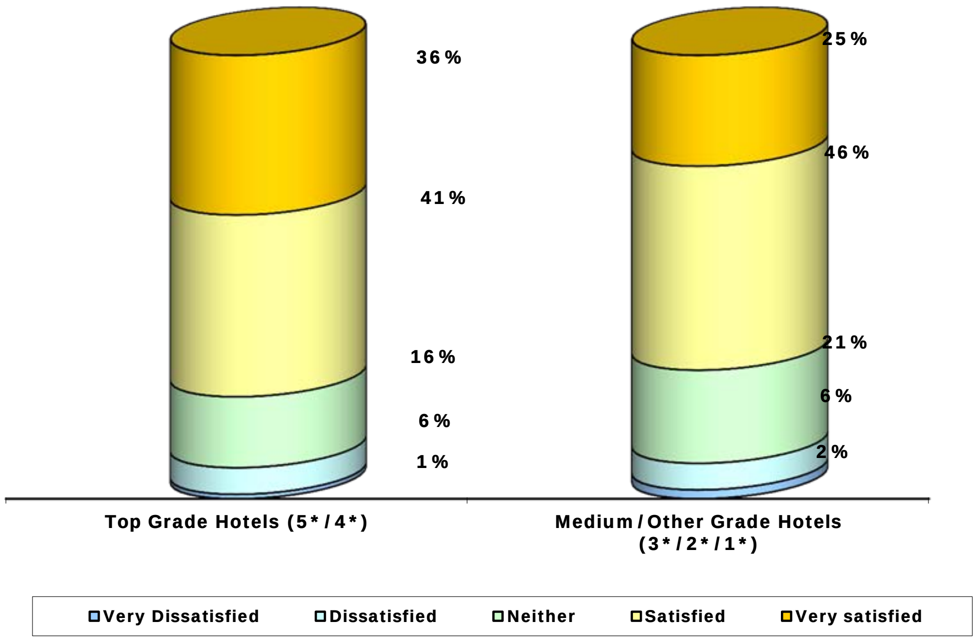
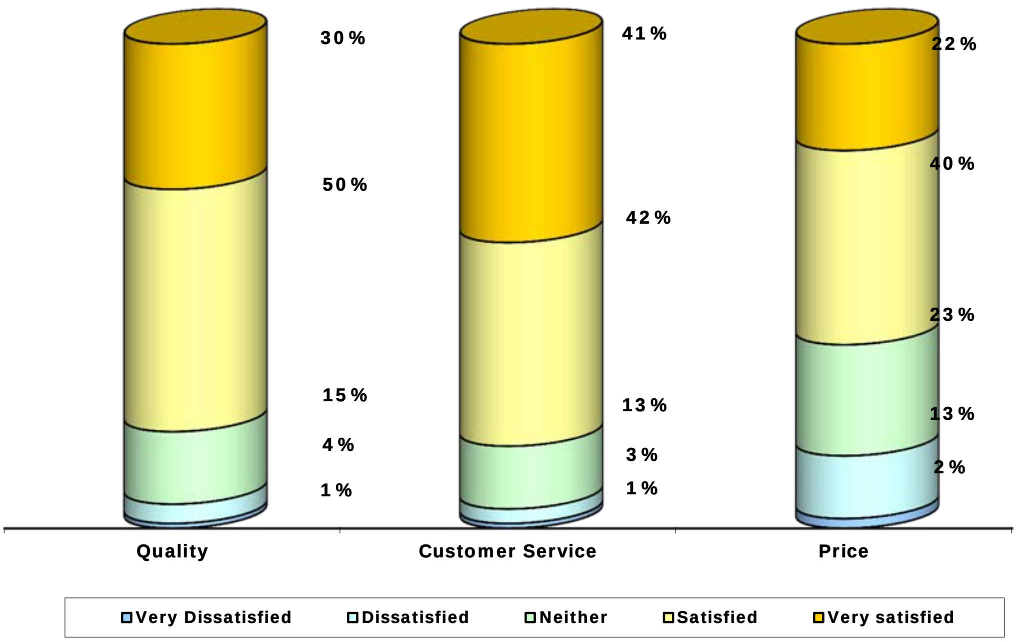


Chart 1.4 Rating of Food in Hotels



- Levels of satisfaction for quality and customer service in top grade hotels were high in 2010, 90% of guests stating they were satisfied or very satisfied. Satisfaction with price was rated much lower with 77% satisfaction; however this is an improvement on the 70% rating in 2009.
- Satisfaction levels for quality and customer service in other hotels were also quite high in 2010, approximately 80% of guests stating satisfaction, price was again rated lower at 70%.
- 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[2] (000's)

	2006	2007	2008	2009	2010	2011	Growth Rate 2011 vs 2010 (%)
Dublin	35.1	40.4	39.5	41.1	44.9	43.8	**-2**
East and Midlands	10.8	14.3	15.2	15.6	16.3	15.9	**-2**
South East	11.0	12.9	13.7	12.3	13.6	13.1	**-4**
South West	20.9	22.5	24.3	22.7	24.6	24.1	**-2**
Shannon	10.5	10.8	13.0	11.6	12.6	12.5	**-1**
West	14.2	15.1	16.6	15.7	17.4	17.5	**+1**
North West	11.2	11.2	11.9	11.5	12.7	12.9	**+2**
Total	113.6	127.2	134.2	130.3	142.1	139.9	-2

Table 1.2 Registered Hotel Premises – By Grade

	2005	2006	2007	2008	2009	2010	2011
Grade 5*	20	22	24	30	32	34	34
Grade 4*	90	100	125	230	246	269	267
Grade 3*	310	306	321	402	407	398	391
Grade 2*	180	154	144	176	168	160	152
Grade 1*	48	36	33	50	43	36	34
Other	205	196	221	17	19	5	5
Total	853	814	868	905	915	902	883

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.

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

Table 1.3 Hotel Beds and Rooms by Grade 2011

	Rooms	Beds
Grade 5*	3,861	8,664
Grade 4*	24,970	58,066
Grade 3*	26,772	64,729
Grade 2*	3,228	7,283
Grade 1*	481	1,052
Other	65	123
Total	**59,377**	**139,917**

Appendix B – Demand

Table 2.1 Bednights (000's)

	2005	2006	2007	2008	2009	2010
Bednights Capacity	36,896	39,347	44,852	48,227	50,273	50,056
Bednights Sold	16,815	18,201	20,839	20,554	20,949	20,433
Bed Occupancy (%)	46	46	46	43	42	41

Table 2.2 Roomnights (000's)

	2005	2006	2007	2008	2009	2010
Roomnights Capacity	15,842	16,707	19,273	21,019	21,276	21,160
Roomnights Sold	9,795	10,685	12,284	12,294	11,978	11,785
Room Occupancy (%)	62	64	64	58	56	56

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

	2005	2006	2007	2008	2009	2010
January – March	3,047	3,431	3,832	4,001	3,914	3,724
April	1,436	1,602	1,743	1,617	1,688	1,667
May	1,518	1,587	1,850	1,937	1,882	1,816
June	1,735	1,749	2,043	1,928	1,959	2,013
July	1,861	1,967	2,285	2,308	2,348	2,310
August	1,977	2,159	2,496	2,450	2,693	2,541
September	1,626	1,714	2,069	1,885	1,965	2,021
October – December	3,614	3,993	4,520	4,427	4,501	4,341
Total	16,815	18,201	20,839	20,554	20,949	20,433

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

	2005	2006	2007	2008	2009	2010
January – March	1,840	2,103	2,371	2,462	2,321	2,230
April	844	922	1,044	1,021	942	966
May	896	981	1,140	1,146	1,109	1,081
June	971	1,034	1,240	1,158	1,135	1,137
July	1,030	1,078	1,282	1,302	1,294	1,258
August	1,057	1,141	1,304	1,356	1,396	1,352
September	979	1,029	1,239	1,172	1,159	1,206
October – December	2,176	2,397	2,665	2,677	2,624	2,553
Total	9,795	10,685	12,284	12,294	11,978	11,785

Table 2.5 Monthly Room Occupancy Rates (%)

	2005	2006	2007	2008	2009	2010
January	41	46	44	43	40	36
February	53	55	54	48	47	46
March	55	59	56	53	48	50
April	62	67	65	58	53	54
May	64	67	67	63	60	59
June	72	73	76	65	63	63
July	73	73	76	71	70	68
August	75	77	77	74	75	73
September	72	74	76	66	64	67
October	63	64	66	61	60	60
November	56	57	55	49	46	46
December	48	51	47	46	45	42
Total	62	64	64	58	56	56

Table 2.6 Monthly Bed Occupancy Rates (%)

	2005	2006	2007	2008	2009	2010
January	27	31	30	29	28	24
February	36	39	38	34	33	32
March	42	40	40	39	35	36
April	45	49	46	40	40	40
May	47	46	47	46	43	42
June	55	52	54	47	46	47
July	57	57	58	55	54	53
August	60	62	63	58	61	58
September	51	53	54	46	46	48
October	45	46	46	43	45	45
November	40	39	41	34	32	31
December	35	38	34	36	33	30
Total	46	46	46	43	42	41

Appendix C - Grade

Table 3.1 Bed Occupancy – By Grade 2010 (%)

	All	Grade 5*	Grade 4*	Grade 3*	Grade 2* and 1*
Jan – Mar	31	31	31	32	23
April	40	36	40	41	28
May	42	41	41	44	30
June	47	49	46	51	32
July	53	55	53	55	35
August	58	61	56	61	39
September	48	52	48	49	31
Oct – Dec	36	44	34	37	28
Total	41	44	40	43	29

Table 3.2 Distribution of Market Guestnights by Grade 2010 (%)

	Grade 5*	Grade 4*	Grade 3*	Grade 2* and 1*	Total
Britain	8	26	61	5	100
Mainland Europe	5	19	70	6	100
North America	22	30	45	2	100
Rest of World	14	26	52	8	100
Northern Ireland	3	38	55	4	100
Republic of Ireland	5	47	44	4	100

Table 3.3 Room Occupancy – By Grade (%)

	2008	2009	2010
Grade 5*	58	54	56
Grade 4*	59	58	55
Grade 3*	61	58	58
Grade 1* & 2*	43	40	42
Total	58	56	56

Table 3.4 Bed Occupancy – By Grade (%)

	2008	2009	2010
Grade 5*	44	41	44
Grade 4*	42	43	40
Grade 3*	45	43	43
Grade 1* & 2*	31	27	29
Total	43	42	41

Appendix D – Regions

Table 4.1 Room Occupancy – By Region (%)

	2005	2006	2007	2008	2009	2010
Dublin	71	72	72	66	63	62
East and Midlands	53	54	54	46	40	42
South East	55	60	57	56	58	57
South West	63	67	66	58	61	58
Shannon	60	63	61	58	51	51
West	57	59	60	59	57	56
North West	54	56	57	51	47	50
Total	62	64	64	58	56	56

Table 4.2 Bed Occupancy – By Region (%)

	2005	2006	2007	2008	2009	2010
Dublin	51	51	53	47	46	44
East and Midlands	37	38	36	31	28	27
South East	40	42	41	42	42	42
South West	49	52	48	41	47	46
Shannon	43	44	41	42	37	38
West	44	43	46	48	42	41
North West	39	41	44	37	37	40
Total	46	46	46	43	42	41

Table 4.3 Bed Occupancy – By Region 2010 (%)

	Total	Dublin	South East	South West	Shannon	West	North West	East and Midlands
Year	**41**	**44**	**42**	**46**	**38**	**41**	**40**	**27**
Jan – Mar	31	36	30	34	28	27	31	19
April	40	41	42	44	38	39	42	27
May	42	44	43	48	40	42	38	27
June	47	47	47	57	47	54	44	30
July	53	50	60	61	49	64	54	32
August	58	55	64	67	53	66	57	43
September	48	51	48	55	41	44	45	37
Oct – Dec	36	42	34	36	34	33	34	25

Appendix E – Grade within Region

Table 5.1 Bed Occupancy Rates – Grade within Region 2010 (%)

	Total	Grade 4* and 5*	Grade 3*	Grade 2* and 1*
Dublin	44	38	50	39
East & Midlands	27	28	26	28
South East	42	50	35	28
South West	46	44	49	37
Shannon	38	42	39	16
West	41	48	37	33
North West	40	42	44	12

Table 5.2 Room Occupancy Rates – Grade within Region 2010 (%)

	Total	Grade 4* and 5*	Grade 3*	Grade 2* and 1*
Dublin	62	55	69	63
East & Midlands	42	44	41	36
South East	57	66	51	36
South West	58	56	60	49
Shannon	51	55	54	22
West	56	62	52	44
North West	50	54	52	16

Appendix F – Room Size

Table 6.1 Room Occupancy – By Room Size (%)

	2005	2006	2007	2008	2009	2010
1-20 Rooms	39	46	44	46	43	45
21-49 Rooms	55	55	56	55	53	53
50-99 Rooms	63	61	59	58	55	55
100+ Rooms	68	70	72	61	59	57
Total	62	63	64	58	56	56

Table 6.2 Bed Occupancy – By Room Size (%)

	2005	2006	2007	2008	2009	2010
1-20 Rooms	29	32	31	33	31	33
21-49 Rooms	41	41	42	40	39	39
50-99 Rooms	46	45	42	43	41	41
100+ Rooms	50	49	50	44	44	42
Total	46	45	46	43	42	41

Table 6.3 Bed Occupancy – By Room Size 2010 (%)

	Total	1-20 Rooms	21-49 Rooms	50-99 Rooms	100+ Rooms
Jan – March	31	24	29	30	32
April	40	31	39	40	40
May	42	34	40	42	43
June	47	38	46	48	48
July	53	44	52	55	53
August	58	48	57	60	58
September	48	37	45	48	49
Oct – Dec	36	29	33	35	37
Total	41	33	39	41	42

Table 6.4 Distribution of Guestnights by Market Area by Room Size 2010 (%)

	1-20 Rooms	21-49 Rooms	50-99 Rooms	100+ Rooms
Britain	9	10	9	12
Mainland Europe	8	9	8	11
North America	4	6	7	8
Rest of World	2	2	2	3
Northern Ireland	5	7	5	4
Republic of Ireland	71	66	68	63
Total	100	100	100	100

Appendix G – Location

Table 7.1 Room Occupancy – By Location (%)

	2005	2006	2007	2008	2009	2010
MMA	68	68	70	64	61	60
Other Urban	64	64	62	55	53	52
Rural	53	58	59	54	52	52
Total	62	64	64	58	56	56

Table 7.2 Bed Occupancy – By Location (%)

	2005	2006	2007	2008	2009	2010
MMA	49	47	48	46	45	43
Other Urban	49	47	45	39	40	39
Rural	40	43	44	40	39	39
Total	46	46	46	43	42	41

Table 7.3 Bed Occupancy – By Location 2010 (%)

	MMA	Other Urban	Rural
January – March	34	28	28
April	40	39	39
May	44	40	39
June	49	47	46
July	53	52	53
August	58	58	58
September	50	47	45
October – December	39	32	33
Total	43	39	39

Appendix H – Markets

Table 8.1 Seasonality of Guestnights within Market Area 2010 (%)

	Jan-Mar	April	May	June	July	Aug	Sept	Oct-Dec	Total
Britain	21	8	10	10	10	11	11	20	100
Mainland Europe	14	8	11	12	14	15	9	16	100
North America	13	6	10	13	14	13	15	16	100
Rest of World	15	7	10	11	12	13	13	19	100
Northern Ireland	17	9	8	7	13	12	9	25	100
Republic of Ireland	19	8	8	9	11	12	9	23	100

Appendix I – Hotel Stock by Region 2011

Table 9.1 Dublin

	Premises	Rooms	Beds
Grade 5*	9	1,492	3,614
Grade 4*	44	7,668	17,198
Grade 3*	74	8,760	20,779
Grade 2*	24	854	1,977
Grade 1*	4	99	225
Other	2	27	52
Total	157	18,900	43,845

Table 9.2 East and Midlands

	Premises	Rooms	Beds
Grade 5*	4	512	1,121
Grade 4*	38	3,507	8,503
Grade 3*	51	2,323	5,391
Grade 2*	23	384	820
Grade 1*	3	39	84
Total	119	6,765	15,919

Table 9.3 South East

	Premises	Rooms	Beds
Grade 5*	3	246	502
Grade 4*	35	2,483	5,911
Grade 3*	44	2,337	6,009
Grade 2*	15	213	466
Grade 1*	8	108	223
Total	105	5,387	13,111

Table 9.4 South West

	Premises	Rooms	Beds
Grade 5*	11	1,035	2,208
Grade 4*	53	4,309	10,384
Grade 3*	69	4,307	10,415
Grade 2*	23	425	997
Grade 1*	4	42	84
Other	1	15	25
Total	161	10,133	24,113

Table 9.5 Shannon

	Premises	Rooms	Beds
Grade 5*	3	254	575
Grade 4*	23	1,527	3,481
Grade 3*	43	3,028	7,286
Grade 2*	17	509	1,153
Grade 1*	2	22	48
Total	88	5,340	12,543

Table 9.6 West

	Premises	Rooms	Beds
Grade 5*	3	227	**454**
Grade 4*	40	2,843	**6,580**
Grade 3*	65	3,658	**9,331**
Grade 2*	25	401	**887**
Grade 1*	8	107	**236**
Total	141	7,236	17,488

Table 9.7 North West

	Premises	Rooms	Beds
Grade 5*	1	95	190
Grade 4*	34	2,633	6,009
Grade 3*	45	2,359	5,518
Grade 2*	25	442	983
Grade 1*	5	64	152
Other	2	23	46
Total	112	5,616	12,898

Appendix J – Hotel Stock by County 2011

Table 10.1 Hotel Stock by County 2011

County	Premises	Rooms
Carlow	9	525
Cavan	17	846
Clare	45	2,486
Cork	81	4,610
Donegal	62	3,096
Dublin	157	18,900
Galway	86	4,746
Kerry	80	5,523
Kildare	24	1,206
Kilkenny	18	1,168
Laois	9	510
Leitrim	7	263
Limerick	30	2,364
Longford	4	111
Louth	14	879
Mayo	52	2,336
Meath	21	1,252
Monaghan	9	341
Offaly	8	368
Roscommon	3	154
Sligo	17	1,070
Tipperary	27	895
Waterford	29	1,612
Westmeath	18	1,191
Wexford	31	1,538
Wicklow	25	1,387
Total	883	59,377

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 2010 the panel size fluctuated, with an average of 219 hotels participating in any given month (maximum of 229 and minimum of 197). Each hotel undertook to provide monthly information as to the number of room and bed nights sold. We achieved an annual response rate of 75% 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 79%, while the minimum response rate achieved was 69%. 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 2010 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 2009 survey and therefore comparisons with previous years is 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 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.