

# Fáilte Ireland Hotel Survey

July 2021 Summary Report



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# Executive Summary

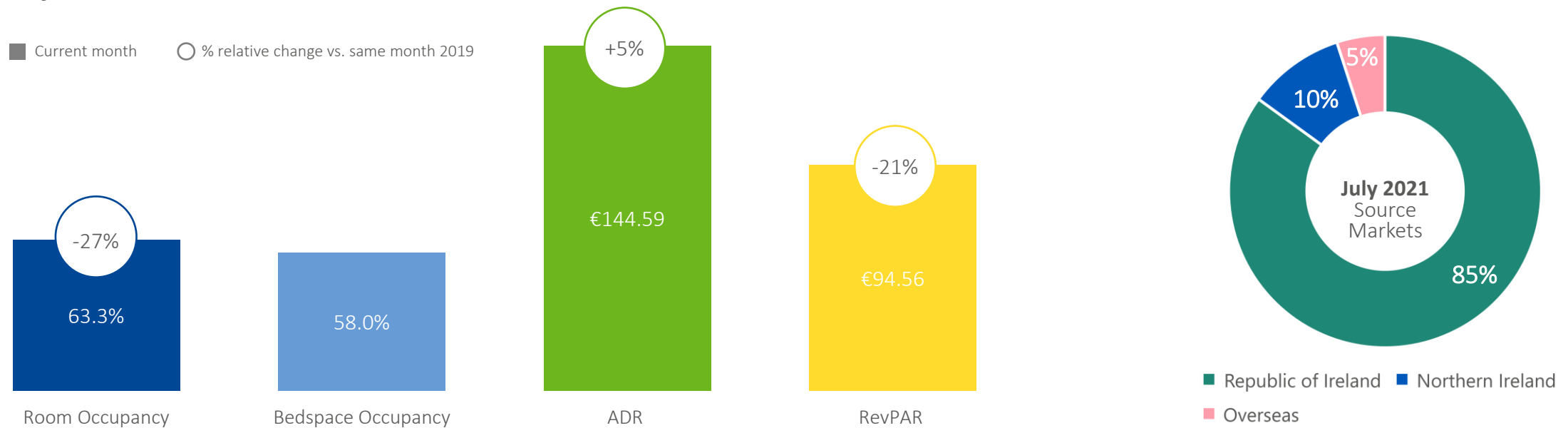
An improved picture was evident amongst open and operating hotels in Ireland in July 2021 compared with June 2021. Room occupancy for the month increased to 63.3% (versus 46.4% in June 2021) and bedspace occupancy was 58.0%. However, room occupancy was still nearly 30% (in relative terms) below the pre-pandemic level of 87.0% in July 2019.

Although the month saw a couple of notable changes which allowed international travel (on 19th July) and indoor dining (on 26th July) to restart, the continuing challenges of COVID-19 which included hampered international travel, lingering anxieties regarding infection and economic uncertainty were all too evident as RevPAR remained just over 20% below the pre-pandemic level of July 2019. However, ADR grew by 5.5%, welcome news for the sector as it continued to grapple with supply and labour challenges.

The impact of the relaxation of rules for international travel was apparent as the proportion of overseas customers increased to 5% compared with 3% in June 2021. However, guests from the Republic of Ireland continued to be the key source market accounting for 85% of hotel guests across the country.

Hotels in more rural parts of the country continued to outperform their urban counterparts. For those in Dublin, limited business and corporate demand and few international travellers contributed to a room occupancy dip of -51% and a RevPAR decline of -63% compared with July 2019. Meanwhile, hotels in Sligo, Waterford and, more so, Wexford performed very robustly, achieving RevPAR growth just shy of 50% compared with July 2019. It's likely that hotels in these areas benefited from a staycation boon and increased appeal of the coast, which coincided with a spell of good weather.

## Key Performance Indicators



Note: Bedspace Occupancy for July 2019 is not available.

# Ireland Room & Bedspace Occupancy: July 2021

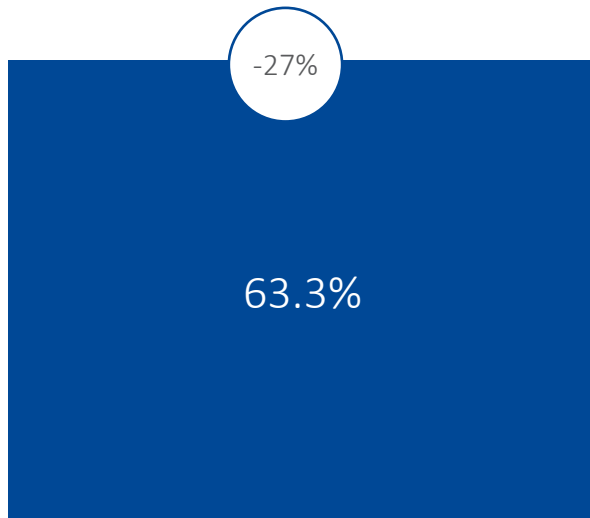
July 2021 marked the first full month of trading for hoteliers in the country following over five consecutive months of restrictions due to the COVID-19 pandemic. Partway through the month (on 19th July) international travel resumed which further bolstered performance compared with June 2021. As a result, room occupancy increased notably to 63.3% in July 2021 (compared with 46.4% in June 2021). Meanwhile, bedspace occupancy, the proportion of available bedspaces sold during the month, sat at 58.0%.

The close correlation of room and bedspace occupancy highlights the ongoing importance of leisure markets for hotels and, more specifically, groups of two or more people.

In relative terms, occupancy was nearly 30% below July 2019 (87.0%) – a more comparable month than July 2020. This finding underlines the continued challenges of the pandemic for the sector, despite the improved picture compared with June 2021. The challenges for hotels in Dublin, in particular, continue to be all too apparent as occupancy was 51% below the pre-pandemic level of 87.9% in July 2019.

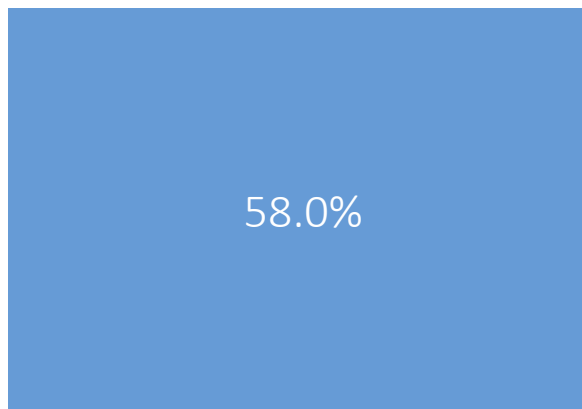
■ Current month    ○ % relative change vs. same month 2019

## Room Occupancy



Jul-21

## Bedspace Occupancy



Jul-21

Highest room occupancy in July

72.8%

Saturday 31<sup>st</sup> July 2021

Highest / lowest performing days of the month

Saturdays / Sundays

# Ireland ADR & RevPAR: July 2021

Reflecting stronger demand for accommodation compared with June 2021, ADR increased to €144.59 (versus €132.01 in June 2021). Encouragingly, this constituted growth of 5% compared with July 2019 when ADR was €137.09.

RevPAR, an important hotel performance metric based on occupancy and ADR, stood at €94.56 during the month. This was just over 20% below July 2019 (€119.37) as the steep contraction in room occupancy outstripped the ADR gain which led to an overall decline in RevPAR.

■ Current month    ○ % relative change vs. same month 2019



Highest RevPAR in July  
**€122.08**  
Saturday 31<sup>st</sup> July 2021

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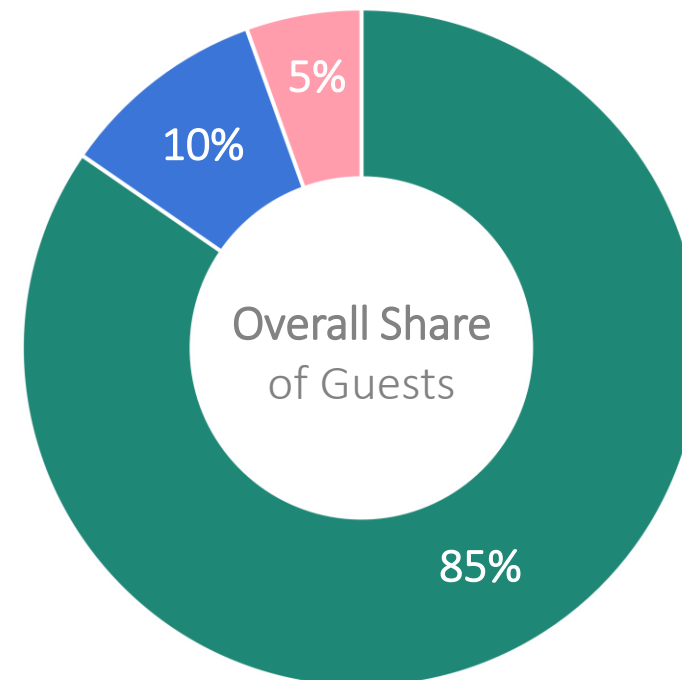
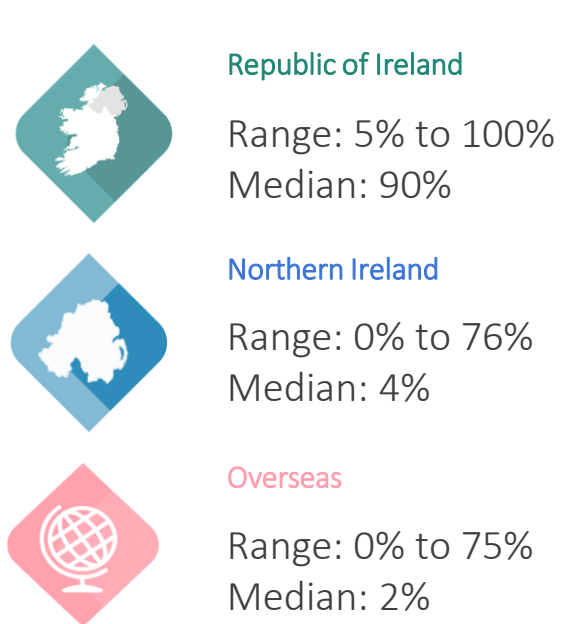
Highest / lowest (RevPAR) performing days of the month  
**Saturdays / Sundays**

Note: Average Daily Rate (ADR) is the average room rate (excluding taxes) charged by hotels.  
Note: Revenue Per Available Room (RevPAR) is the total room revenue divided by the total number of available rooms.

# Ireland Source Markets: July 2021

Buoyed by a resumption of international travel, there was growth in the proportion of overseas guests staying at hotels in the country (5% this month versus 3% in June 2021). Whereas a similar proportion of around 10% of customers were from Northern Ireland this month. The remainder, 85%, were domestic customers from the Republic of Ireland. This latter finding highlights continued reliance on domestic markets even though international travel has resumed as it is still being heavily hampered by the pandemic.

There were variations in the mix of guests at hotels across the country. Dublin hotels welcomed the highest proportion of overseas guests. Meanwhile, counties bordering Northern Ireland such as Donegal attracted comparatively more guests from Northern Ireland.



Note: Range is the lowest and highest share of guests stated by hotels.

Note: Median is the value separating the higher half from the lower half of the data, sometimes referred to as the “middle” value. A median value can also be the lowest or highest value and so may also be represented in the range.

# County Occupancy

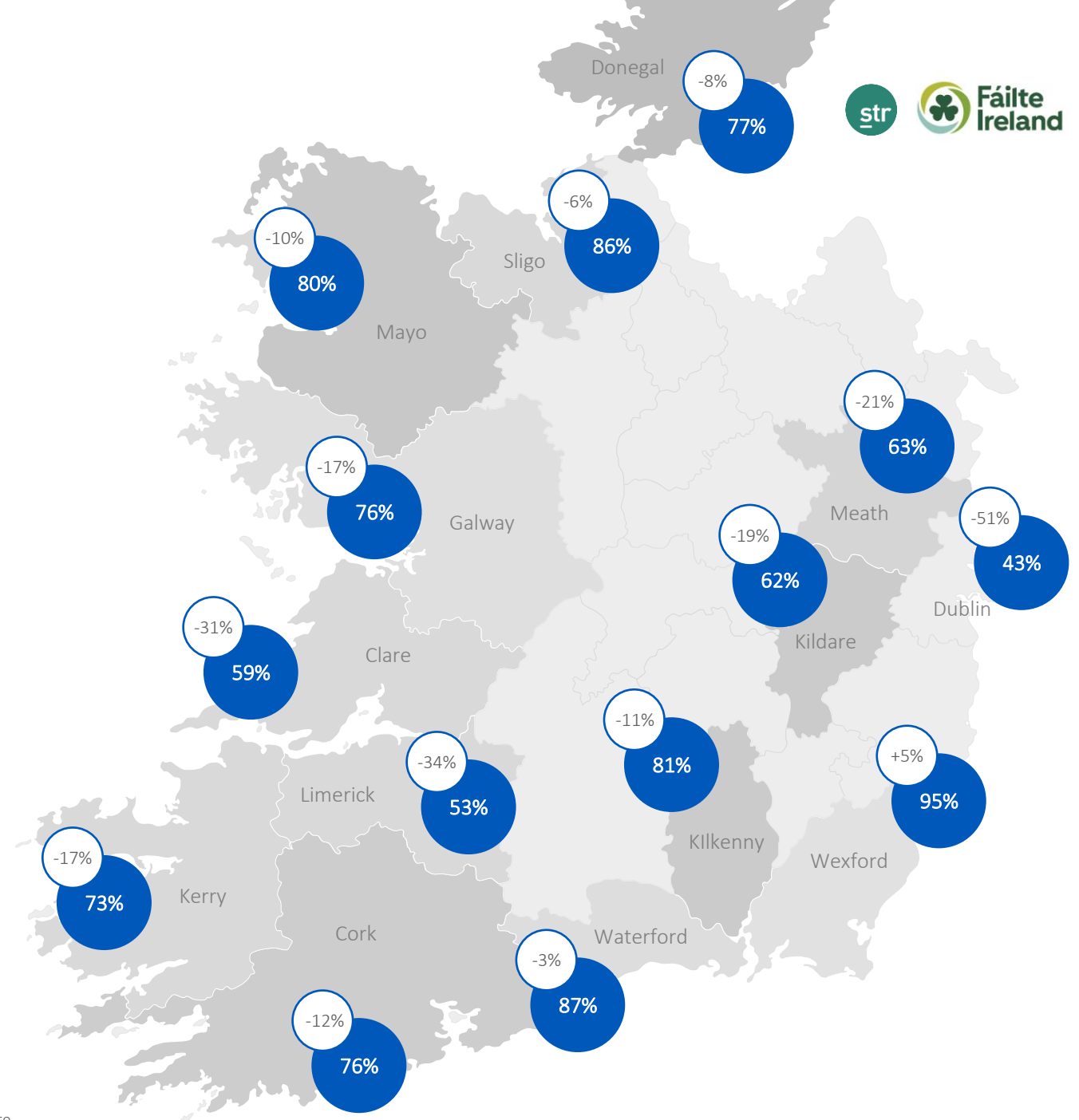


● Current month room occupancy    ○ % relative change vs. same month 2019

In July 2021, occupancy varied significantly across the counties of Ireland with a gap of over 50 percentage points (in absolute terms) from the lowest to the highest performing county, based on the 14 counties in which there is sufficient data for analysis.

Hotels in Wexford achieved the highest occupancy of 95% followed by those in Waterford (87%) and taking third place was Sligo (86%). The appeal and relative proximity of Wexford's beaches from Dublin coupled with the good weather are likely to have contributed to the particularly buoyant demand recorded in the county during the month.

Indeed, the only county which posted occupancy growth compared with July 2019 was Wexford (+5%). Other better performing counties which saw occupancy dip the least were Waterford (-3%) and Sligo (-6%). Meanwhile, the steepest declines in occupancy were amongst hotels in Clare (-31%), Limerick (-34%) and Dublin (-51%). For the latter, disruption to business and corporate travel due to the pandemic continued to pay a heavy toll on hoteliers in the city.



Note: There are 14 counties with sufficient room occupancy data in July 2021. These are displayed and reported here.

# County ADR & RevPAR

● ADR ● RevPAR ● % relative change vs. same month 2019

## Average Daily Rate (ADR)

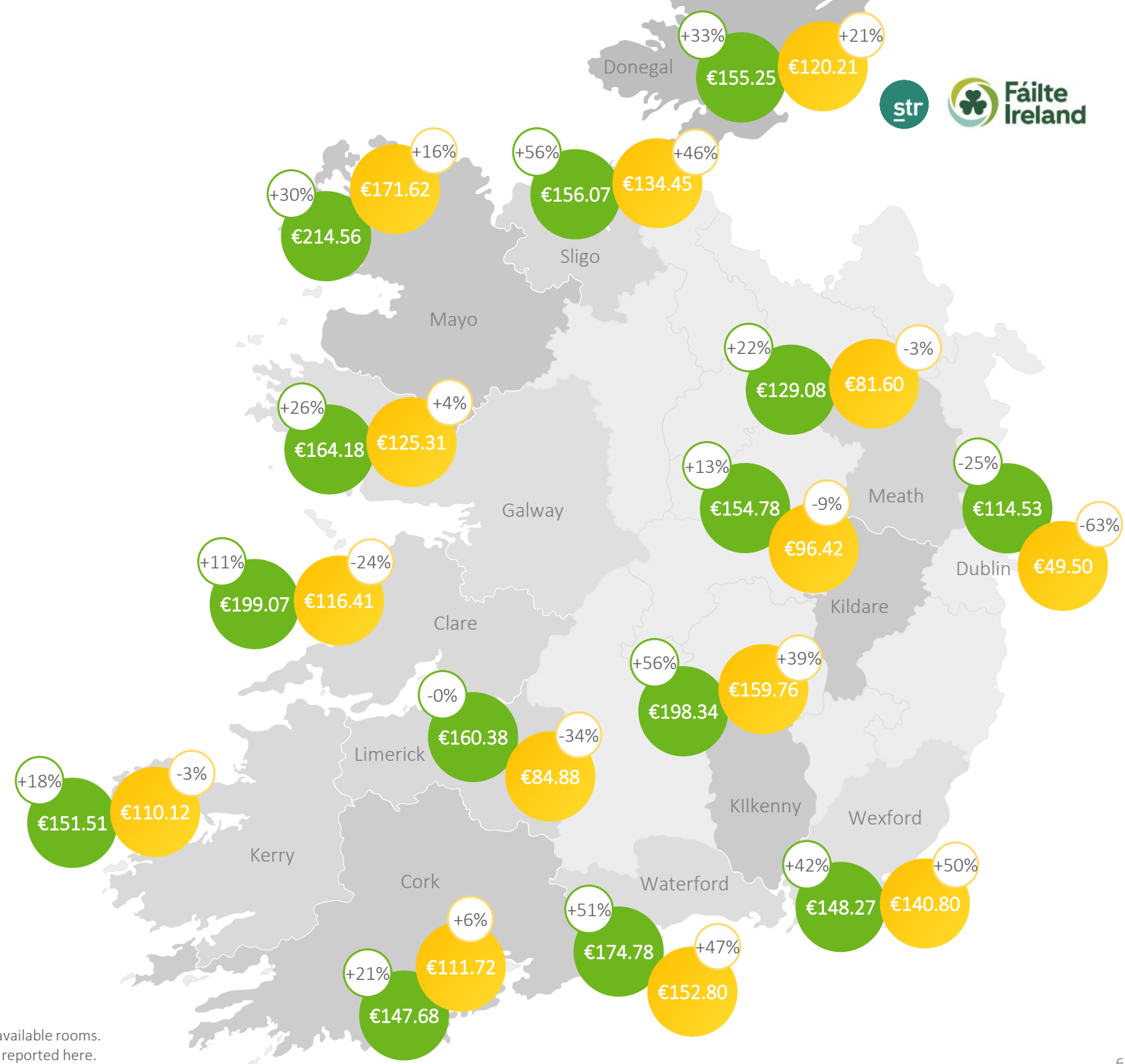
The highest ADR was among hotels in Mayo as they achieved €214.56. Not to be outdone, Clare and Kilkenny followed with ADRs of €199.07 and €198.34. These were the only three counties to achieve ADR around or above €200 during the month.

The highest performing counties compared with July 2019 in terms of ADR, were Kilkenny, Sligo and Waterford with each achieving ADR growth of 50% or above. Hotels in all but two counties posted increased ADR compared with July 2019. Limerick achieved comparable ADR, and Dublin noted a 25% decline in ADR.

## Revenue Per Available Room (RevPAR)

Driven by its particularly high ADR, the highest RevPAR was in Mayo (€171.62.88) followed by Kilkenny (€159.76) and Waterford (€152.80).

Meanwhile, comparing with July 2019, the counties which achieved the strongest RevPAR growth were Wexford, Waterford and Sligo. Each grew RevPAR by nearly 50%. The strong performance of these counties may be due in part to their tourism product, specifically the coast and water-based activities in these areas. Conversely, hotels in Dublin and less so Limerick and Clare recorded RevPAR declines of over 20% compared with July 2019. However, overall, seven out of the 13 counties achieved RevPAR growth compared with July 2019.



Note: Average Daily Rate (ADR) is the average room rate (excluding taxes) charged by hotels.  
 Note: Revenue Per Available Room (RevPAR) is the total room revenue divided by the total number of available rooms.  
 Note: There are 14 counties with sufficient ADR and RevPAR data in July 2021. These are displayed and reported here.  
 Note: -/+0% indicates decline/growth of less than 1%.



# County Source Markets

Hotels in Limerick welcomed the highest proportion of domestic guests during the month with fewer than 2% from outside of the Republic of Ireland. This is a particularly interesting finding as in June 2021 around 20% of hotel guests in the county were from overseas.

Like in June 2021, hotels in Donegal attracted a well above average proportion of Northern Ireland guests (28% this month and 29% last month). The proximity to the Northern Ireland border is very likely a key driving factor behind this result. There were also comparatively more guests from Northern Ireland recorded among hotels in Kerry and Kildare. Perhaps paradoxically, the relative distance of Kerry from Northern Ireland may be one reason behind this result as Northern Irish families travelled the length and breadth of the island for their summer holiday break.

Meanwhile, hotels in Dublin, Cork and Galway welcomed comparatively more overseas guests. The popularity of Cork amongst the German and French markets coinciding with the easing of international travel may partially account for the uptick in overseas customers this month (7% in July 2021 versus 1% in June 2021). Benefitting from its international airlinks, the highest proportion of overseas guests was among Dublin hotels (11%).



Republic of Ireland



Northern Ireland



Overseas

County	Republic of Ireland	Northern Ireland	Overseas
Cork	91.2%	1.4%	7.4%
Donegal	67.1%	28.3%	4.6%
Dublin	83.1%	6.1%	10.8%
Galway	89.5%	3.6%	6.9%
Kerry	77.4%	18.2%	4.4%
Kildare	85.1%	12.9%	2.0%
Limerick	98.3%	0.2%	1.5%

# Methodology Statement

In June 2021, Fáilte Ireland re-launched its Hotel Survey in partnership with STR, a leading global hospitality data benchmarking, analytics and insights provider.

The new survey collects the following information per month based on two data collection systems:

## ***Rooms Data (collected on an ongoing basis using STR's proprietary systems)***

- Total number of available rooms
- Number of sold occupied rooms
- Net rooms revenue

This data is used to calculate the three most relevant metrics within the accommodation industry namely: Room Occupancy, Average Daily Rate (ADR) and Revenue Per Available Room (RevPAR).

## ***Bedspaces Data (collected by monthly online survey administered by STR)***

- Bedspaces sold to key markets (Republic of Ireland, Northern Ireland and Overseas)
- Total number of available bedspaces

This data is used to calculate bedspace occupancy, which is the proportion of available bedspaces sold each month, and share of guests by the key markets.

## **Additional Notes**

- Where applicable in this report, data is compared with the same data of 2019 as comparisons with 2020 are less meaningful due to the impact of COVID-19.
- Ireland room occupancy, bedspace occupancy, ADR and RevPAR for the current month and for the same month in 2019 are calculated using a weighted average methodology to reflect the supply of hotel accommodation in the regions of Ireland. No other data points in this report are based on weighted averages.
- The samples of participants in the two data collection systems are different. Therefore, some data points may not appear consistently throughout the report.
- All units given throughout this report represent a positive number, unless stated otherwise.
- Percentage change figures are expressed in relative terms (not in absolute terms), unless stated otherwise.
- "n/a" or blank spaces in this report indicate insufficient data to enable reporting of a data

point. This is done to protect the anonymity of responses and ensure full data confidentiality.

- Data in these reports is not consistent with previous reports published by Fáilte Ireland prior to the June 2021 report.
- Throughout the pandemic, STR has continued to collect performance data from hotels that remained open. The data in this month's report is therefore only based on those hotels that were open and reported data to STR (Rooms Data n=229, Bedspace / Source Market Data n=214, Overall Universe of Hotels n=819).
- Further details about STR's hotel data methodology can be found [here](#).

## **For more information please contact:**

Website: [www.str.com](http://www.str.com)  
Telephone: (+44) (0) 207 922 1930  
Email: [industrydata@str.com](mailto:industrydata@str.com)

