

# Fáilte Ireland Hotel Survey

## October 2021 Summary Report



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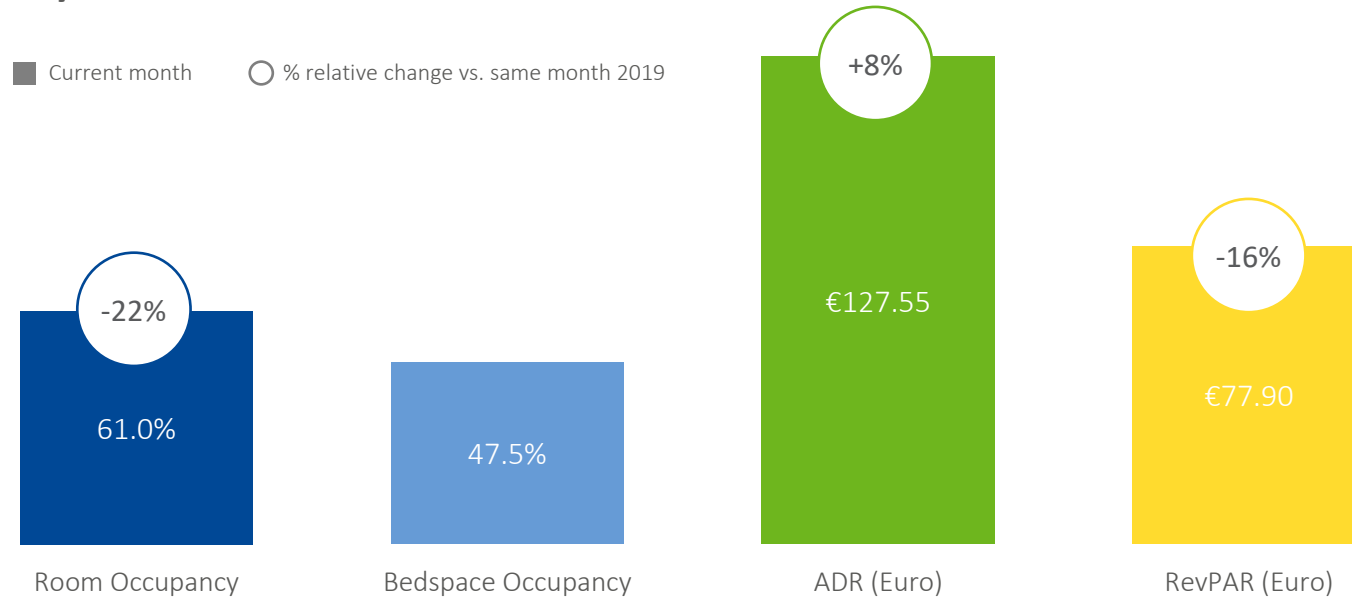
# Executive Summary

On par with September 2021, Ireland's hotel room occupancy was 61.0% in October 2021. Following the trend of previous months, this was still well behind the pre-pandemic level of 78.2% in October 2019. However, the gap narrowed, albeit slowly, compared with recent months to -22% (in relative terms) below 2019. Meanwhile, bedspace occupancy during the month was 47.5%.

While demand for accommodation shrunk compared with two years ago, encouragingly hotels were able to grow room rates overall as ADR increased by 8.3% to €127.55 compared with €117.83 in October 2019. The exception to the rule remains the Dublin market due to continued reductions in international and business travellers.

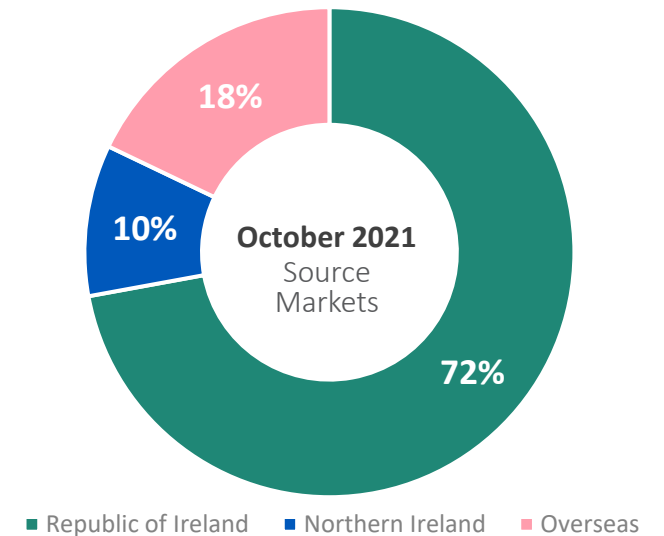
Highlighting the challenges to recovery, RevPAR overall dipped to €77.90. This was -16% below the pre-pandemic level of €93.06 in October 2019.

## Key Performance Indicators



However, a reduction in RevPAR was not observed universally across the country. Indeed, hotels in nine of the 15 counties with sufficient data to enable reporting posted RevPAR growth compared with 2019 which hints at news of a more positive nature. Most notably, operators in Wexford and Sligo achieved RevPAR growth of circa 30% or above.

For the fourth successive month there was an increase in international guests staying at hotels in Ireland. This segment accounted for 18% of guests overall in October 2021 compared with 16% in September 2021, 13% in August 2021 and less than 10% in July and June 2021. Meanwhile, the Northern Ireland market was again static accounting for 10% of hotel guests. However, these guests were concentrated in Donegal, making up 46% of the guest mix at hotels there. The remainder, and continued lion's share of guests, were from the Republic of Ireland (72%).

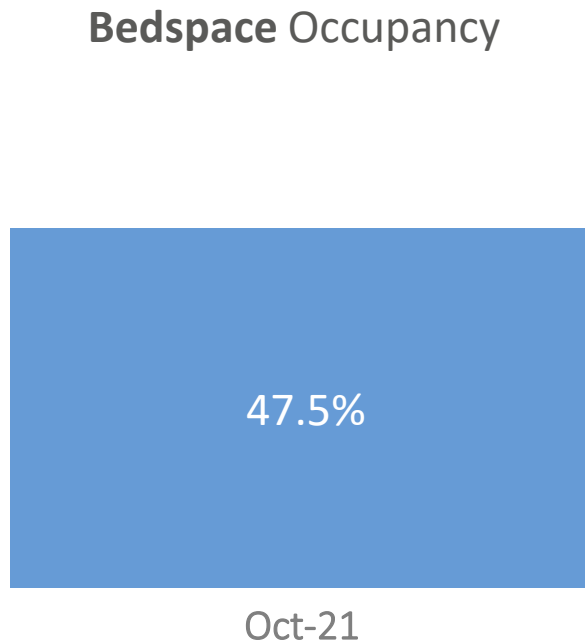
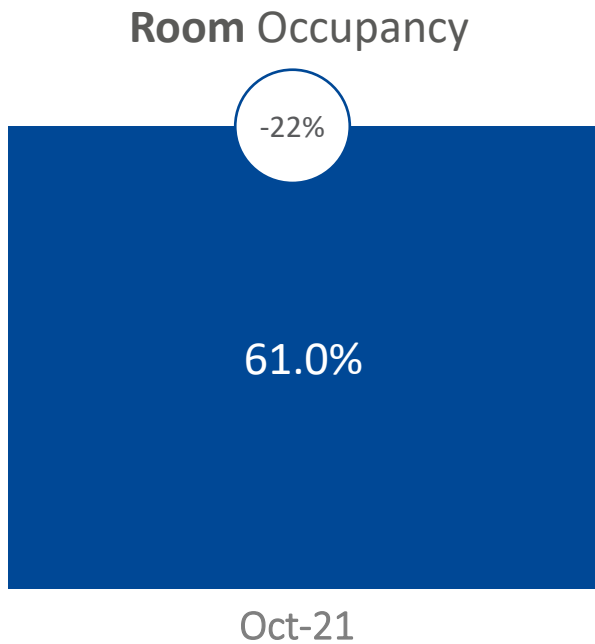


# Ireland Room & Bedspace Occupancy: October 2021



In October 2021, room occupancy in Ireland was 61.0%. While identical to September 2021, this level of performance was one fifth down on October 2019. The highest performing day of the month was Saturday 23<sup>rd</sup> October at 77.3% which coincided with the start of the October mid-term break. Meanwhile, bedspace occupancy, the proportion of available bedspaces sold, during the month was 47.5%, which compared with 44.9% in September 2021.

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



Highest room occupancy in October  
**77.3%**  
Saturday 23<sup>rd</sup> October 2021

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Highest / lowest performing days of the month  
Saturdays (73.3%) / Sundays (50.8%)

Note: Bedspace Occupancy for 2019 is not available.

# Ireland ADR & RevPAR: October 2021



Reversing the trend recorded in September 2021, hoteliers across Ireland successfully increased room rates above the pre-pandemic level. In October 2021, ADR was €127.55 which was 8% above the ADR of €117.83 in October 2019. These results were likely influenced by stronger domestic demand in 2021 as international travel barriers and uncertainties continued to deter some cohorts from holidaying abroad, especially during the mid-term break, and instead choosing to holiday at home. In addition, ADR was likely propped up again by less group and corporate business in 2021.

However, the steep decline in occupancy compared with October 2019 led to an overall decline in RevPAR, an important hotel performance metric based on rooms available and room revenue. Broadly similar with September 2021 but significantly below August and July 2021 when RevPAR hovered around the €100 mark, RevPAR in October 2021 was €77.90. This constituted a -16% decline in RevPAR compared with October 2019 which was the softest decline recorded since the new hotel survey was launched in June 2021.

While RevPAR decreased overall in Ireland compared with 2019, hotels in nine out of the 15 counties with sufficient data to enable reporting achieved growth in RevPAR in October 2021. This finding highlights a variation in performance for hotels in different parts of the country as they continue to adapt to the impacts of the pandemic.

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



**Highest RevPAR in October**  
**€132.75**  
Saturday 23<sup>rd</sup> October 2021

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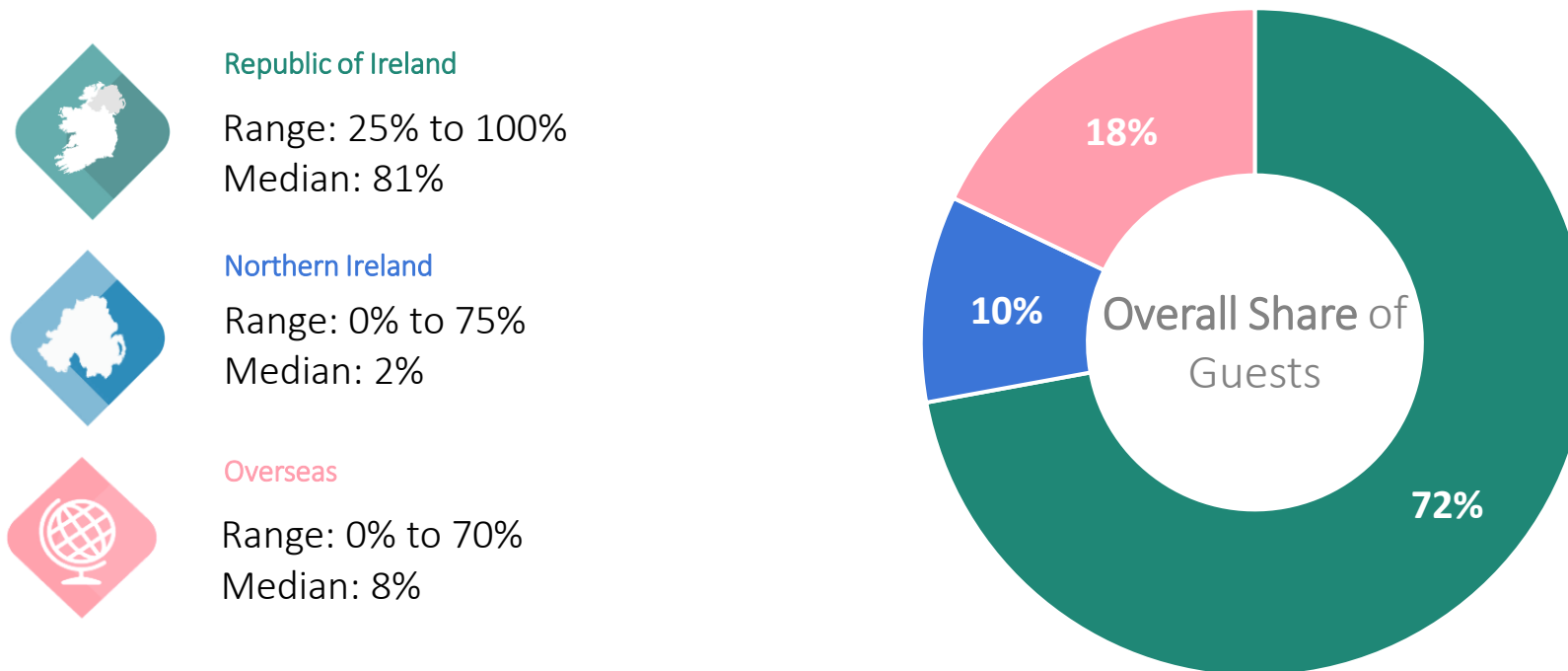
**Highest / lowest (RevPAR) performing days of the month**  
Saturdays (€114.01) / Mondays (€59.55)

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: October 2021

As in previous months, guests from the Republic of Ireland were the key source market for hoteliers in Ireland. In October 2021, they accounted for 72% of all guests. This was slightly lower than recent months as continued growth in international guests shifted the mix of guests. Overall, international visitors accounted for 18% of hotel guests in October 2021. This marked the fourth successive month since June 2021 in which the proportion of international guests increased.

Meanwhile, guests from Northern Ireland continued to account for 10% of all hotel guests. These guests continued to be heavily concentrated close to the Northern Ireland border in Donegal with few Northern Ireland guests staying at hotels outside of Donegal or Dublin.



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

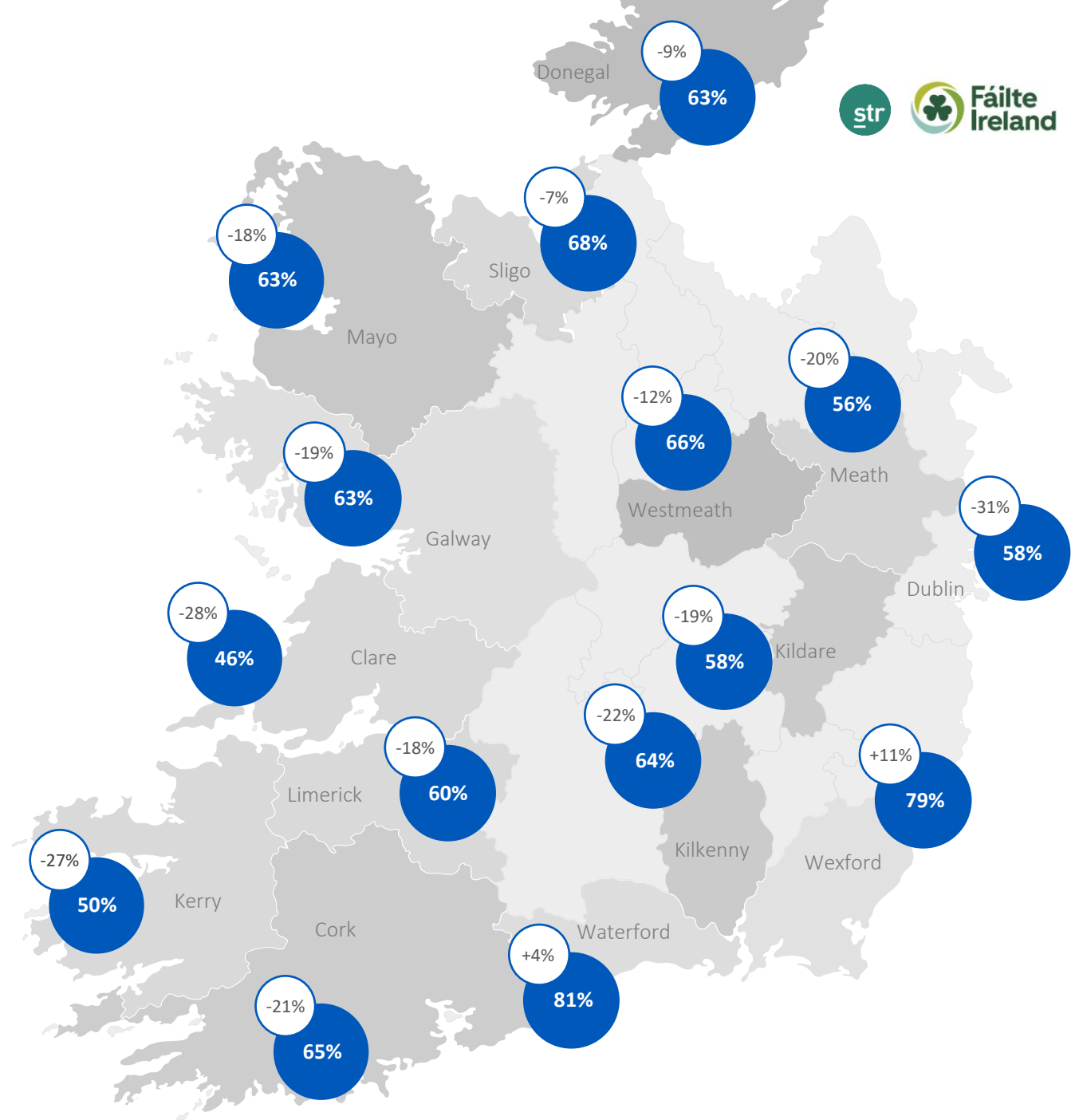
Note: Median is the value separating the higher half from the lower half of the data, sometimes referred to as the "middle" value. A median value can also be the lowest or highest value and so may also be represented in the range.

# County Occupancy

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

Repeating the trend of September 2021, the highest performing hotels by room occupancy in October 2021 were in Waterford (81%) and Wexford (79%). Meanwhile, again consistent with September 2021 results, the lowest occupancy was posted by hotels in Clare (46%) while hotels in Kerry achieved the second lowest room occupancy of 50%.

All except two of the 15 counties with sufficient data to enable reporting decreased occupancy compared with the pre-pandemic level of performance in October 2019. The exceptions were Wexford which increased occupancy by +11% (in relative terms) and Waterford (+4%). For the former, this was the fourth successive month that room occupancy outstripped 2019 levels as the area continued to benefit from its appeal as a short break and holiday destination on the coast, with good access for the urban populations of Dublin and Cork. Meanwhile, hotels in Dublin, Clare and Kerry noted the steepest decline in room occupancy as all three were circa 30% behind October 2019.



# County ADR & RevPAR

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

## Average Daily Rate (ADR)

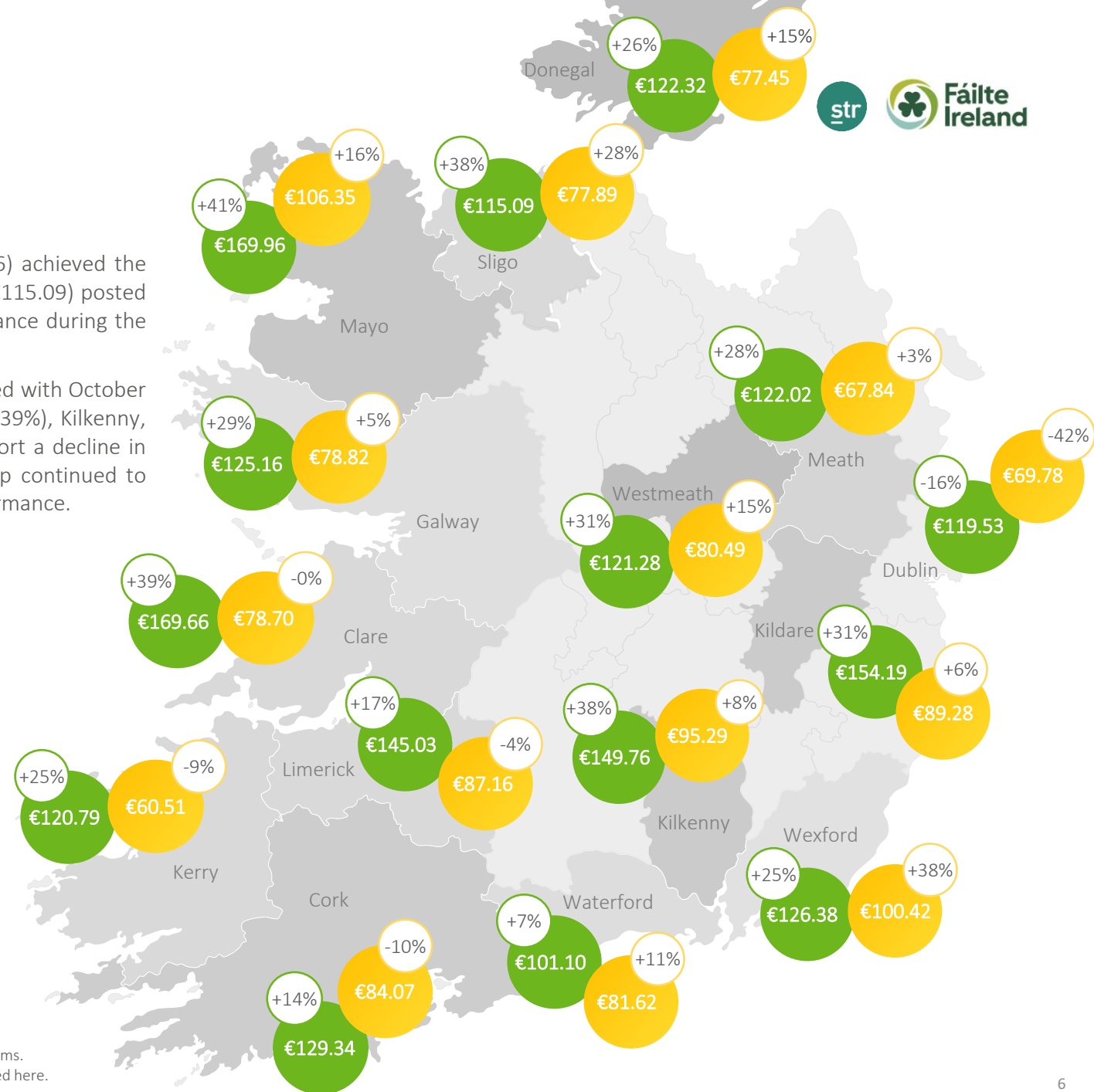
Consistent with recent months, hotels in Mayo (€169.96) and Clare (€169.66) achieved the highest ADR in October 2021. While those in Waterford (€101.10) and Sligo (€115.09) posted the lowest ADR which may help to explain their stronger occupancy performance during the month.

Hotels in 14 of the 15 reporting counties recorded an increase in ADR compared with October 2019. Strongest ADR growth was achieved by hotels in Mayo (+41%), Clare (+39%), Kilkenny, and Sligo (both +38%). Whilst Dublin continued to be the only county to report a decline in ADR compared to the pre-pandemic level achieved in October 2019, the gap continued to narrow with the market now at only -16% behind pre-pandemic October performance.

## Revenue Per Available Room (RevPAR)

The three counties which achieved the highest RevPAR of circa €100 were Mayo (€106.35), Wexford (€100.42) and Kilkenny (€95.29). This was the fifth consecutive month Mayo hoteliers achieved the highest RevPAR among the reporting counties. On the other end of the scale, the lowest RevPAR was recorded by hotels in Kerry (€60.51), Meath (€67.84) and Dublin (€69.78).

Nine of the 15 reporting counties achieved RevPAR growth compared with October 2019. This compared to seven from 15 in September 2021. The steepest growth was recorded by Wexford (+38%) and Sligo (+28%) hotels. Hotels in these areas performed above average in terms of room occupancy which, combined with strong ADR growth, led to significant RevPAR gains. There were two counties – Dublin (-42%) and Cork (-10%) – which posted double digit contractions in RevPAR compared with pre-pandemic levels this month versus eight in September 2021 which suggests an improved picture for many hotels.



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 15 counties with sufficient ADR and RevPAR data in October 2021. These are displayed and reported here.  
 Note: -/+0% indicates decline/growth of less than 1%.



# County Source Markets

Of the six counties with sufficient source market data to enable reporting, the counties which attracted the highest proportion of domestic guests from the Republic of Ireland were Cork and Kerry (both 91%).

As observed in previous months, Donegal hotels welcomed the highest share of guests from Northern Ireland. This segment accounted for 46% of guests in Donegal hotels in October 2021. Whereas hotels in the remaining counties, excluding Dublin, stated that fewer than 5% of their guests were from Northern Ireland.

Meanwhile, hotels in Dublin (36%), Clare and Galway (both 26%) hosted the most international guests. The overall incidence of international arrivals has increased month-on-month since July 2021. This has been most notable among Dublin hotels as the mix of international guests has increased from 11% in July 2021 to 36% in October 2021.



Republic of Ireland



Northern Ireland



Overseas

County	Republic of Ireland	Northern Ireland	Overseas
Clare	73.5%	0.5%	26.0%
Cork	90.6%	1.7%	7.6%
Donegal	46.0%	45.7%	8.3%
Dublin	54.3%	9.6%	36.1%
Galway	73.0%	1.2%	25.8%
Kerry	91.0%	3.0%	6.0%

# 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=236, Bedspace / Source Market Data n=205, Overall Universe of Hotels n=819).
- Further details about STR's hotel data methodology can be found [here](#).

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