

# Ireland Annual Hotel Industry Survey **2017**

Twenty-Second Edition



2017

# EXECUTIVE SUMMARY AND HIGHLIGHTS

## All Hotels

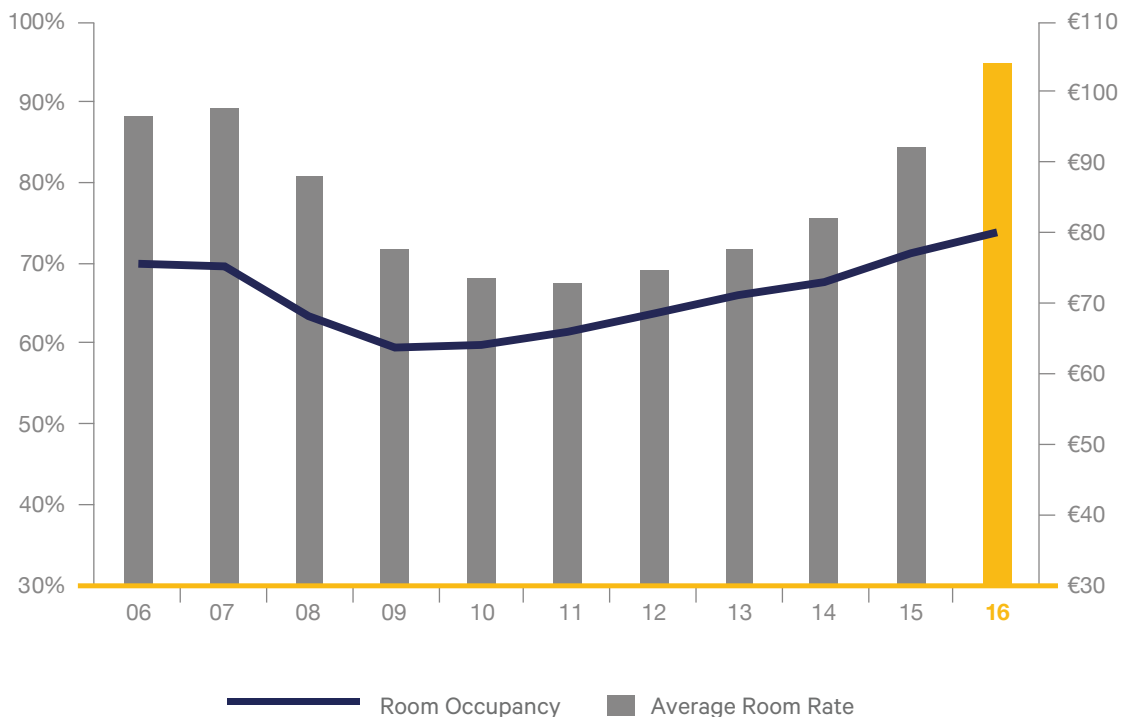
All Hotels	2016	2015	2014
Room Occupancy	74.0%	71.1%	67.8%
Average Room Rate	€104.11	€92.15	€82.29
RevPAR	€77.04	€65.52	€55.79
Total Revenue per Room	€66,688	€60,280	€53,916
Department Profit per Room	€32,655	€28,257	€24,574
Gross Operating Profit per Room	€17,918	€14,916	€11,902
Gross Operating Profit per Room (%)	26.9%	24.7%	22.1%
Profit Before Tax per Room	€14,558	€11,990	€9,201
Profit Before Tax per Room (%)	21.9%	19.9%	17.1%



## RevPAR up 17%

**There has been an increase in RevPAR for all hotels of 17%. This is due to an increase in occupancy by 3 percentage points and an increase in average rate by 13%. This is the second year of 17% growth in RevPAR for all hotels in Ireland.**

## Occupancy and ARR Trends



## Executive Summary and Highlights

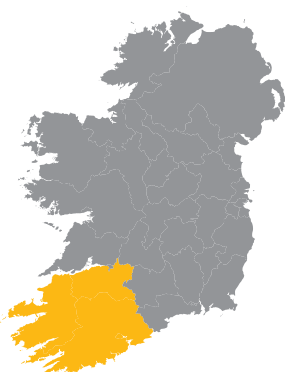
### Region

Dublin	2016	2015	2014
Room Occupancy	82.3%	80.7%	77.2%
Average Room Rate	€128.27	€111.83	€97.25
RevPAR	€105.57	€90.25	€75.08
Total Revenue per Room	€66,927	€59,123	€52,490
Profit Before Tax per Room	€20,492	€16,913	€13,797

Midlands & East	2016	2015	2014
Room Occupancy	68.5%	65.0%	62.4%
Average Room Rate	€91.40	€84.20	€79.36
RevPAR	€62.61	€54.73	€49.52
Total Revenue per Room	€77,967	€73,059	€62,369
Profit Before Tax per Room	€11,821	€10,628	€7,393

South West	2016	2015	2014
Room Occupancy	68.9%	66.8%	65.7%
Average Room Rate	€93.25	€84.71	€79.43
RevPAR	€64.25	€56.59	€52.19
Total Revenue per Room	€59,876	€53,320	€50,431
Profit Before Tax per Room	€10,273	€8,370	€7,140

Western Seaboard	2016	2015	2014
Room Occupancy	68.3%	66.9%	65.2%
Average Room Rate	€79.77	€74.20	€67.50
RevPAR	€54.48	€49.64	€44.01
Total Revenue per Room	€55,678	€49,953	€46,168
Profit Before Tax per Room	€9,479	€8,058	€6,791



## 10% average growth rate in South West

**The South West has performed stronger in 2016 than in 2015, with all key metrics showing higher growth rates than the previous two years. The increase in US visitors to this region has supported higher rates.**

## Executive Summary and Highlights

### Classification

Luxury	2016	2015	2014
Room Occupancy	72.6%	72.0%	68.3%
Average Room Rate	€205.24	€181.08	€159.04
RevPAR	€149.00	€130.38	€108.62
Total Revenue per Room	€111,997	€100,954	€88,121
Profit Before Tax per Room	€25,007	€20,860	€15,548

First Class	2016	2015	2014
Room Occupancy	75.3%	72.2%	68.7%
Average Room Rate	€103.68	€91.10	€81.71
RevPAR	€78.07	€65.77	€56.13
Total Revenue per Room	€69,778	€62,897	€57,053
Profit Before Tax per Room	€15,871	€12,805	€9,821

Mid Price	2016	2015	2014
Room Occupancy	74.0%	71.3%	68.7%
Average Room Rate	€78.32	€67.93	€62.25
RevPAR	€57.96	€48.43	€42.77
Total Revenue per Room	€52,886	€47,537	€43,526
Profit Before Tax per Room	€10,745	€9,157	€7,439

Economy	2016	2015	2014
Room Occupancy	66.8%	64.5%	62.2%
Average Room Rate	€61.18	€55.89	€50.01
RevPAR	€40.87	€36.05	€31.11
Total Revenue per Room	€34,314	€31,219	€26,346
Profit Before Tax per Room	€5,549	€4,631	€3,301



Continued growth  
in demand

**Rate has increased over the previous year across all hotel classifications in conjunction with the continued strength of demand.**

## Executive Summary and Highlights

### Size

1-49 Rooms	2016	2015	2014
Room Occupancy	67.1%	65.8%	61.0%
Average Room Rate	€79.52	€75.45	€69.53
RevPAR	€53.36	€49.65	€42.41
Total Revenue per Room	€72,031	€68,925	€62,986
Profit Before Tax per Room	€10,913	€9,969	€7,860

50-99 Rooms	2016	2015	2014
Room Occupancy	71.9%	69.6%	66.1%
Average Room Rate	€103.12	€90.85	€79.82
RevPAR	€74.14	€63.23	€52.76
Total Revenue per Room	€71,119	€61,885	€55,479
Profit Before Tax per Room	€13,297	€10,988	€8,342

100+ Rooms	2016	2015	2014
Room Occupancy	77.1%	74.8%	71.9%
Average Room Rate	€109.71	€100.22	€88.05
RevPAR	€84.58	€74.96	€63.31
Total Revenue per Room	€61,847	€55,409	€49,957
Profit Before Tax per Room	€16,346	€13,636	€10,200



+21%

**Mid-sized hotels achieved the highest growth in RevPAR in 2016, which resulted in the highest profit growth of all size categories at 21% from 2015.**

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