

An Updated Overview of Beneficiaries of Temporary Protection (BOTP) and International Protection (IP) Contracted Bed Stock

May 2024



The May 2024 Update



The Updated Position, May 2024



- The analysis is based on data provided by the Dept of Children & Integration.
 - There are **77,315 beds under contracts, a fall of -8.5% since November 2023.**
 - The mix is as follows:
 - **25,079 beds (32.4%)** are in premises on **FI registers and listings**
 - **52,236 (67.6%)** are in **non-registered properties.**
 - **85.8% of the 25,079 beds in FI registered premises are in hotels and guesthouses.**
 - Nationally, **10% of all FI registered tourism bed stock is under contract.**
 - Clare, at 25%, is the only county with more than 20% of registered bed capacity out of use for tourism. Counties Meath, Louth, Mayo and Wicklow all have 15-19% of registered stock under contract. All other counties have less than 15%.
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Summary Table of BOTP & IP Contracted Beds



All BOTP and IP Contracted Beds	Nov '23	May '24	Change
Beds in FI Registered Properties	29,586	25,079	-15.2%
Beds in non-FI Registered Properties	54,911	52,236	-4.9%
- of which tourism relevant, i.e., non-FI registered accommodation likely to have been trading in the tourism sector	14,000 – 28,000	13,000 – 26,000	
Totals	84,497	77,315	-8.5%

The Updated Position, May 2024



- **Significant reduction in the number of beds under contract, down 7,182 (-8.5%) over the six months from Nov '23 to May '24.**
- **The biggest decline was in FI registered properties, down 4,507 beds (-15.2%).** The reduction amongst unregistered properties was 2,675 (-4.9%)
- **Looking at the 52,236 beds in unregistered properties, around 26,000 are in establishments which could be tourism related.**
- **Nationally, 10% of registered beds are under contract.** This is down from 12% in June, which is principally due to a fall in contracted bed stock.
- The 10% average may understate the on-the-ground impact; for every FI registered bed under contract there is up to one more contracted bed in unregistered tourism relevant sites.
- **Again, this highlights the need for, and importance of, a fully inclusive register of all tourist accommodation stock.**

Contracted Beds by County, FI Registered Only



Percentage of Contracted Beds in Registered Properties Relative to County's Total			
Clare	25	Dublin	9
Meath	19	Kerry	9
Louth	19	Laois	9
Mayo	17	Limerick	7
Wicklow	16	Longford	7
Offaly	14	Waterford	7
Westmeath	14	Kilkenny	6
Cavan	13	Galway	6
Tipperary	12	Roscommon	5
Cork	11	Wexford	4
Leitrim	11	Monaghan	3
Donegal	10	Carlow	3
Sligo	10	Kildare	2
<i>All County Average</i>			10

Estimating the Tourism Revenue at Risk



Up to €1 billion Revenues Lost Annually



- The **May 2024 estimate** of the economic impact of displaced bed stock is in the range **€650 million to €1.0 billion**.
- This is explained as follows:
 - a) If we only factored in FI registered stock into the calculation (25,079 beds), the revenue hit is €650 million p.a.**
 - b) If we broaden the calculation to include contracts in (a) FI registered stock and (b) half of the unregistered tourism relevant properties (13,000 beds), then the estimate is €1.0 billion.**
- Note that we only consider the loss of potential tourism spending outside of the accommodation sector.

Questions Arising & Follow Up Analysis



Questions Arising

- At face value the results are very positive for tourism, assuming the 4,507 registered beds no longer under contract *could* come back into tourism usage, plus a share of the 2,675 non-registered beds.
- However, the results do raise a few questions:
 - 1) Is this apparently available capacity coming back to tourism usage? And if so**
 - 2) On what scale?**
 - 3) When?**
 - 4) And in what condition?**
- FI will need more time to get a better understanding of these issues and their implications as answering these questions requires new primary research.