

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

Dec 2024



November 2024 Update



In Summary



- The analysis is based on November '24 data provided by the Dept of Children & Integration.
 - There are **65,457 beds under contracts, a fall of -15% since last May.**
 - The bed mix is as follows:
 - **17,632 beds (27% of contracted beds)** are in premises on **Fáilte Ireland (FI) registers/listings**
 - **47,825 (73%)** are in **non-registered properties.**
 - **The number of beds under contract in FI registered properties is down -30%** since May. This compares with a fall of -8% in non-registered premises.
 - Nationally, **7% of all FI registered bed stock is under contract**, it was 10% in May.
 - The counties with the highest share of registered bed capacity out of use by tourists are Clare (18%), Meath (18%), Wicklow (14%), Mayo (12%) Offaly (12%) and Cork (10%). All other counties are below 10%.
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Summary Table of BOTP & IP Contracted Beds



All BOTP and IP Contracted Beds	May '24	Nov '24	% Change
Beds in FI Registered Properties	25,079	17,632	-29.7%
Beds in non-FI Registered Properties	52,236	47,825	-8.4%
<i>- of which tourism relevant, i.e., non-FI registered accommodation likely to have been trading in the tourism sector</i>	<i>13,000 to 26,000</i>	<i>12,000 to 24,000</i>	
Totals	77,315	65,457	-15.3%

BOTP & IP Contracted Beds Update



- There has been a significant reduction in the number of beds under contract, down 11,858 (-15%) since last May.
 - The biggest decline is in FI registered properties, down 7,447 (-30%). The reduction amongst unregistered properties is 4,411 (-8%).
 - Looking at the 47,825 beds in unregistered properties, around 24,000 are in establishments which could be tourism related.
 - **7% of all FI registered beds are under contract.** This is down from 10% since the summer, which is due largely to a fall in contracted bed stock.
 - The 7% average may understate the real impact; for every FI registered bed under contract there is up to one more bed in unregistered tourism relevant sites.
 - Again, highlighting the importance of a fully inclusive register of tourist accommodation.
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Contracted Beds by County, FI Registered Only



Percentage of Contracted Beds per County in FI Registered Properties

Meath	18	Leitrim	5
Clare	18	Cavan	5
Wicklow	14	Waterford	5
Mayo	12	Galway	5
Offaly	12	Donegal	4
Cork	10	Kilkenny	4
Westmeath	8	Wexford	3
Louth	8	Kildare	2
Tipperary	8	Carlow	2
Limerick	7	Roscommon	2
Dublin	7	Longford	1
Sligo	7	Laois	1
Kerry	6	Monaghan	1
<i>All County Average</i>			7

Estimating the Tourism Revenue at Risk



Up to €670 million Revenues Lost Annually



- The **November 2024 estimate** of the economic impact of displaced bed stock is in the range **€400 million to €670 million**.
 - This is explained as follows:
 - a) If we only factored in FI registered stock into the calculation** (17,632 beds), the revenue hit is **€400 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** (12,000 beds), then the estimate is **€670 million**. Note that we only consider the loss of potential tourism spending outside of the accommodation sector.
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Implications for Tourist Destinations



The short-term destination level implications of displaced tourism bed stock



- **Less stock:** Particularly in mid-market properties, which is limiting the industry's ability to meet demand from domestic and overseas tourists.
 - **Higher prices:** Often, based on the supply-demand imbalance.
 - **Less international group bookings:** Inbound tour operators say it is very difficult to get suitable 'bed blocks' at internationally competitive rates, especially in mid-market hotels.
 - **Reduced tourism footfall and spending locally:** leading to lower turnover for non-accommodation tourism businesses.
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