

An Updated Overview of Government Contracted Bed Stock

Dec 2023



The November Update



The Updated Position, Nov 2023



- This analysis is based on data provided by the Department of Children, Equality, Disability, Integration and Youth
 - There are **84,497 beds under contracts, up 11% since June.**
 - The mix is as follows:
 - **29,586 beds (35%)** are in premises on **Fáilte Ireland registers and listings**
 - **54,911 (65%)** are in **non-registered properties.**
 - **86% of the beds in Fáilte Ireland registered premises are in hotels and guesthouses.**
 - Nationally, **12% of all Fáilte Ireland registered tourism bed stock is under contract.**
 - There are three **counties with 20% or more** of available capacity out of use for tourism. They are **Clare, Meath and Mayo.**
-

Contracted Beds Summary Table



All Government Contracted Beds	June	Nov	Change
Beds in Fáilte Ireland Registered Properties	29,555	29,586	0.1%
Beds in non-Fáilte Ireland Registered Properties	46,588	54,911	17.9%
<i>- of which tourism relevant, i.e., non-FI registered accommodation likely to have been trading in the tourism sector</i>	<i>12,000 – 24,000</i>	<i>14,000 – 28,000</i>	
Totals	76,143	84,497	11.0%

The Updated Position



- **No real change on the Fáilte Ireland registered side.** Almost all of the 8,354 (+11%) growth since the June update was on the non-registered side.
 - **Looking at the 54,911 beds in unregistered properties, *up to 28,000* are in establishments which could be tourism related,** i.e., former hotels, inns, lodges, unlisted guesthouses, unregistered B&Bs, re-purposed accommodation retreat centres.
 - **Nationally, 12% of registered beds are under contract. This is down from 13% in June due to an increase in the total level of registered stock.**
 - The 12% average may understate the on-the-ground impact. For every Fáilte Ireland registered bed under contract there is up to one more contracted bed in unregistered tourism relevant sites.
 - 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	33	Laois	11
Meath	26	Kerry	11
Mayo	20	Dublin	10
Wicklow	19	Waterford	8
Offaly	18	Galway	8
Westmeath	17	Tipperary	8
Cavan	17	Limerick	8
Leitrim	17	Carlow	7
Donegal	15	Kilkenny	7
Sligo	14	Wexford	6
Louth	13	Monaghan	6
Longford	12	Roscommon	6
Cork	12	Kildare	2
<i>All County Average</i>			12
<i>All County Average excluding Dublin</i>			13

Estimating the Tourism Revenue at Risk



Illustrating the Revenues Lost Annually – Up to €1.1 billion



- The **November 2023 inflation adjusted estimate** of the economic impact of displaced bed stock is in the range **€750 million to €1.1 billion**.
- This is explained as follows:
 - a) If we only factored in registered stock into the calculation (29,586 beds), the revenue hit is €750 million p.a.**
 - b) If we broaden the calculation to include contracts in (a) registered stock and (b) half of the unregistered tourism relevant properties (14,000 beds), then the estimate is €1.1 billion.**