

# Tourist Accommodation Outlook

*Ireland's Capacity and Pipeline*

June 2025

*Welcome to the second biannual Tourist Accommodation Outlook, which provides a comprehensive analysis and monitoring of the current and future bedspace capacity in Ireland.*

*The tourist accommodation sector is a key part of the broader hospitality industry, generating significant economic output and employment. It continues to be well recognised by Fáilte Ireland that the tourism sector is experiencing capacity constraints. This is evidenced through year-round high occupancy rates in urban locations and seasonal peaks regionally.*

*Fáilte Ireland is committed to extending seasonality throughout the year to deliver a more balanced level of tourist volumes, this will drive additional value when accommodation capacity is not at peak demand. However, it is estimated that longer term demand will continue to largely outweigh supply impacting room rates, value for money perception and visitor experience.*

*This analysis aims to provide Fáilte Ireland and our key stakeholders with robust data and insights to support informed decision-making. By leveraging this research Fáilte Ireland aim to support and influence the development of the right accommodation type in the right location at the appropriate time.*

*Fáilte Ireland aim to foster a positive climate for tourist accommodation investment and development, ensuring the sector continues to be a vital driver of the economy and Ireland remains a competitive destination for visitors.*

*Fáilte Ireland wishes to thank all contributors and stakeholders involved in the development of this report.*



**Anne Walsh**







Head of Accommodation Development  
Fáilte Ireland






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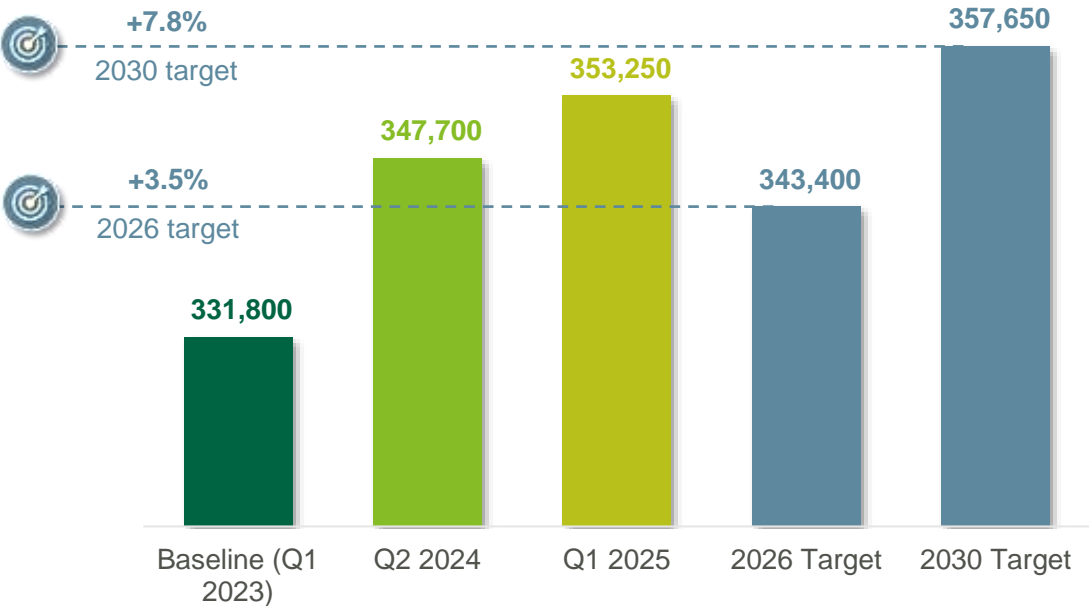
### Background:

There is a well-recognised shortage of tourist accommodation in Ireland. To address this, Fáilte Ireland has defined goals as follows:

 **Goal to 2026:** Support development of incremental bedspaces (+3.5% versus 2023) of the right type and quality.

 **Goal to 2030:** Support the development of incremental bedspaces (+7.8% versus 2023) of the right type and quality.

Estimate Combined Stock: Change in the number of bedspaces



Data Source: Fáilte Ireland, Lighthouse Intelligence Inc  
Figures may not sum exactly due to rounding.

### Introduction

This report is the second in a series of biannual reports, which aim to monitor the volume of tourist accommodation bedspaces within the market and compare this to the growth targets outlined. These reports outline:

1. Changes emerging within the supply of tourist accommodation bedspaces;
2. The volume of bedspaces within the planning pipeline that may lead to further changes in supply;
3. Relevant challenges and opportunities emerging from the data, which are important to consider in the context of the growth targets.

In this report, the supply of tourist accommodation bedspaces as of Q1 2025 is presented. This supply is compared Q2 2024, the time period analysed in the first Tourist Accommodation Outlook report. Comparisons against the baseline (Q1 2023) can be found in Appendix B.

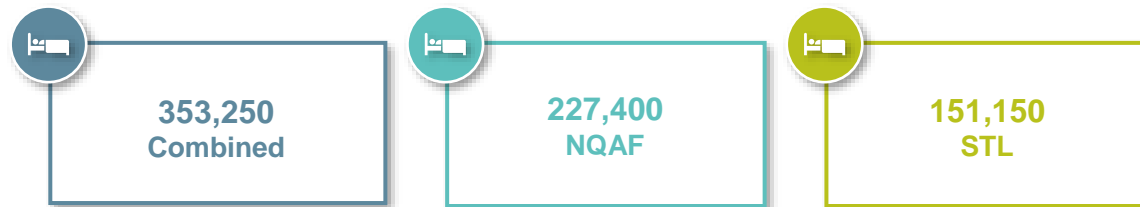
The volume of bedspaces within the planning pipeline presented is also reflective of Q1 2025.

# Executive Summary



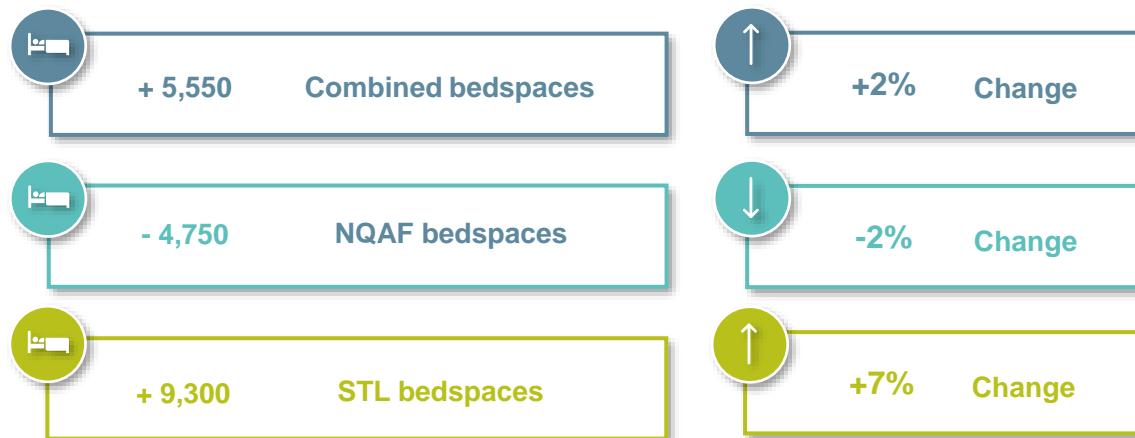
The supply of tourist accommodation bedspaces as of Q1 2025 has been analysed. This includes registered National Quality Assurance Framework (NQAF) bedspaces, an estimate of Short-Term Let (STL) bedspaces and an estimate of combined stock.

## Bedspaces in Q1 2025



The change in tourist accommodation stock in Q1 2025 versus the previous reporting period of Q2 2024 has been analysed. Growth in STL stock continues to drive overall bedspace growth, however STL stock is transient and is more difficult to measure.

## Change in bedspaces in Q1 2025 versus Q2 2024



Data Source: Fáilte Ireland, Lighthouse Intelligence Inc, CIS, Deloitte. Figures may not sum exactly due to rounding. See Appendix A & B for detailed breakdown of methodology and limitations.

The pipeline of tourist accommodation in Ireland has been assessed to quantify future capacity and growth potential within the sector.

## Bedspaces in the development pipeline in Q1 2025



The majority of bedspaces under construction are in the Hotel sector (80%), with 86% located in Dublin.

Construction activity increased, however the rise is concentrated in Dublin. Dublin City accounts for 90% of all hotels under construction. This raises questions regarding future stock increases of scale outside of Dublin.

Hotels in Dublin account for 60% (16,500) of bedspaces with plans granted as of Q1 2025. Research\* indicates that the conversion rate for planning to practical completion in Dublin is 43%, thereby implying that potentially only 7,100 bedspaces will progress to construction.

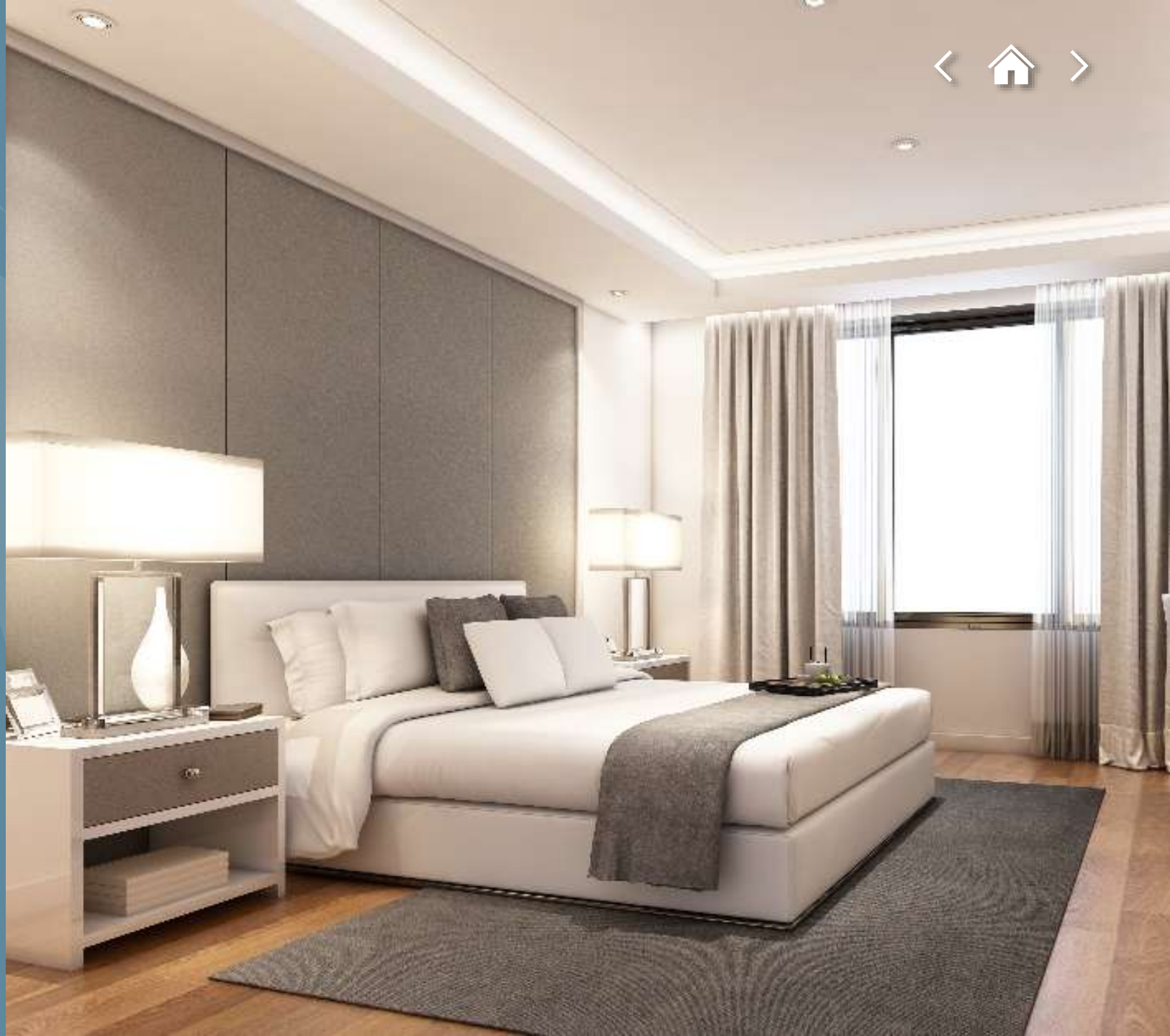
Trends within the pipeline data provide a mixed message for future stock. Positively, construction activity increased, however there was a lack of large - scale schemes coming through the pipeline.

Rise in Outdoor planning applications, reflective of viability and a changing consumer.

Based on construction timelines for the bedspaces under construction, it is estimated that **total bedspace stock will grow by +3.0% from Q1 2025 to Q4 2027**. This estimate assumes that there is no change to the existing bedspace stock.

\* Planning to Practical Completion Conversion Rates: An Analysis of Dublin Hotel Development: 2015 - 2024, Fáilte Ireland.

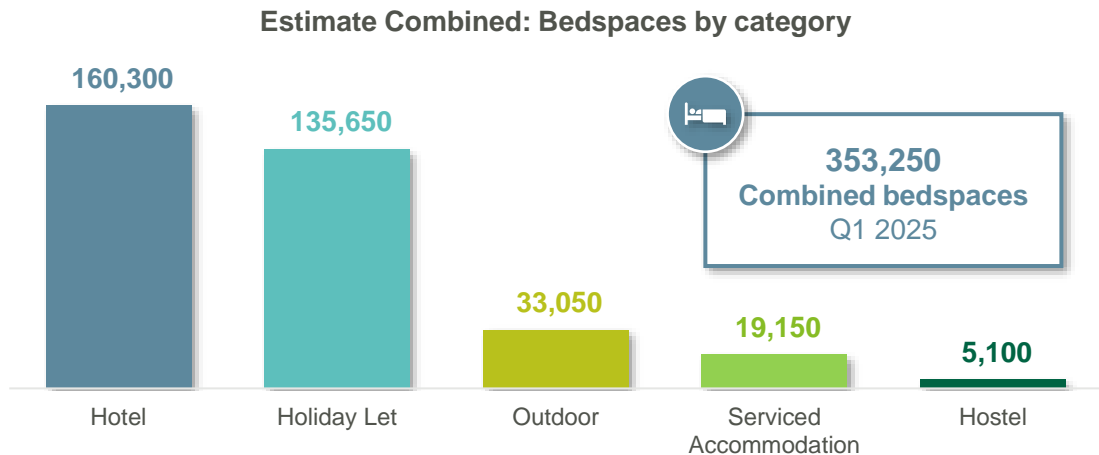
## 1. Current Supply – Q1 2025





This section presents the stock of tourist accommodation in Ireland as of Q1 2025, which has been derived from two datasets: Fáilte Ireland’s National Quality Assurance Framework (NQAF) data and Short Term Let (STL) data. It is presented in three forms; Estimate Combined, NQAF and Estimate STL. It is important to acknowledge the methodology and limitations associated with this data, particularly STL data. To ensure a comprehensive understanding and correct interpretation of the dataset, please refer to [Appendix A](#).

- As of Q1 2025, there are 353,250 estimate combined bedspaces.
- Hotels (45%) and Holiday Lets (38%) account for the vast majority nationwide. The remaining three categories command substantially smaller shares, Outdoor (9%), Serviced Accommodation (5%) and Hostel (1%).
- Dublin dominates bedspaces on a regional basis, with just under 1 in 4 bedspaces nationwide located in the capital.



Data Source: Fáilte Ireland, Lighthouse Intelligence Inc.  
Figures may not sum exactly due to rounding.

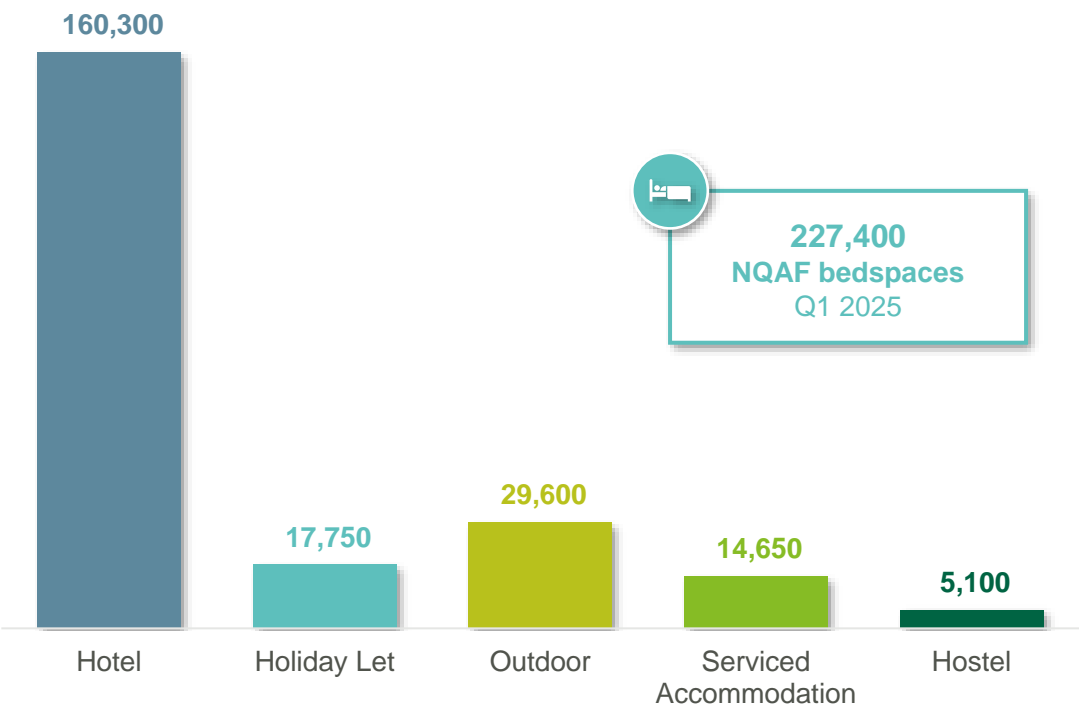
**Estimate Combined: Bedspaces by county in Q1 2025**  
Number of bedspaces and share of total bedspaces

	County	No. of bedspaces	Share of total bedspaces		County	No. of bedspaces	Share of total bedspaces
1	Dublin	86,250	24%	14	Tipperary	6,250	2%
2	Kerry	38,650	11%	15	Meath	6,150	2%
3	Galway	31,050	9%	16	Kildare	5,400	2%
4	Cork	31,000	9%	17	Louth	4,850	1%
5	Donegal	26,300	7%	18	Westmeath	4,300	1%
6	Mayo	18,900	5%	19	Cavan	3,750	1%
7	Clare	17,450	5%	20	Longford	3,300	1%
8	Wexford	12,400	4%	21	Leitrim	3,250	1%
9	Waterford	10,750	3%	22	Roscommon	2,850	1%
10	Wicklow	10,150	3%	23	Laois	2,500	1%
11	Limerick	8,250	2%	24	Carlow	2,250	1%
12	Sligo	7,750	2%	25	Offaly	1,750	1%
13	Kilkenny	6,250	2%	26	Monaghan	1,550	< 1%

Data Source: Fáilte Ireland, Lighthouse Intelligence Inc.

- Hotels dominate NQAF supply, accounting for 71% of bedspaces. The remaining four categories command significantly smaller shares, ranging from 2% - 13%.
- Dublin accounts for 29% of all NQAF bedspaces nationwide, with 64,900 bedspaces in the capital in Q1 2025.

NQAF: Bedspaces by category



Data Source: Fáilte Ireland.  
Figures may not sum exactly due to rounding.

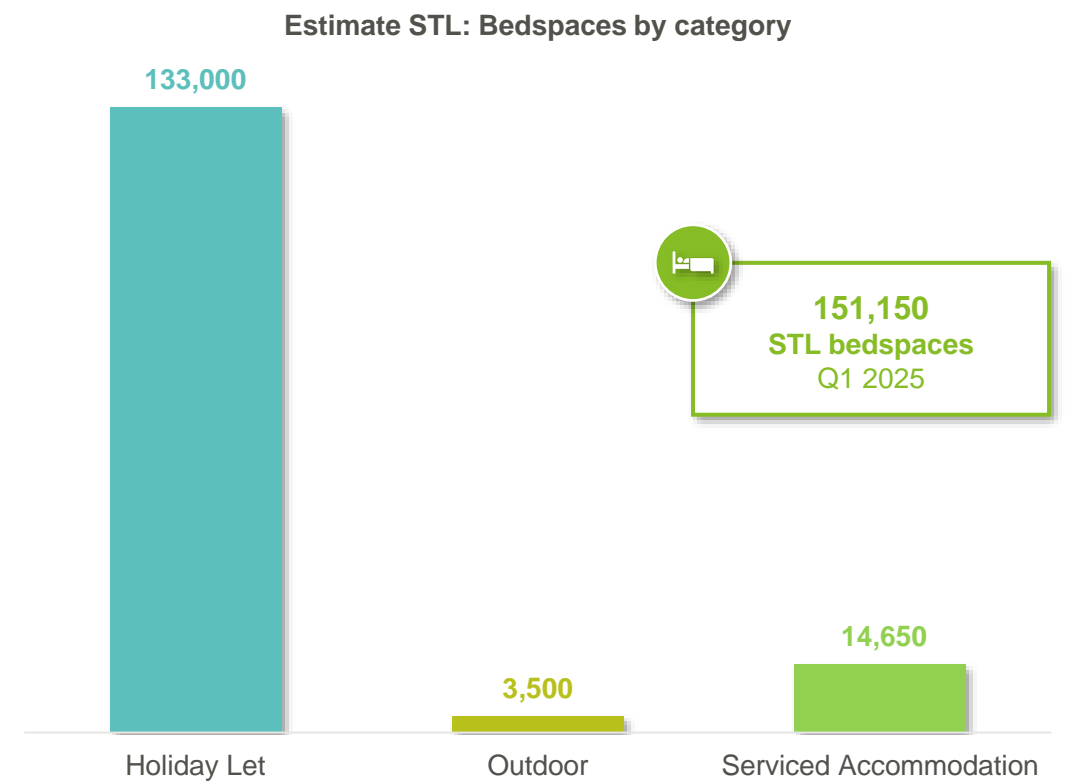
NQAF: Bedspaces by county in Q1 2025  
Number of bedspaces and share of total bedspaces

	County	No. of bedspaces	Share of total bedspaces		County	No. of bedspaces	Share of total bedspaces
1	Dublin	64,900	29%	14	Kilkenny	4,150	2%
2	Kerry	22,850	10%	15	Kildare	4,100	2%
3	Cork	20,200	9%	16	Tipperary	3,950	2%
4	Galway	17,100	8%	17	Westmeath	3,250	1%
5	Donegal	11,200	5%	18	Longford	2,900	1%
6	Mayo	9,950	4%	19	Louth	2,850	1%
7	Clare	9,550	4%	20	Cavan	2,650	1%
8	Waterford	7,750	3%	21	Leitrim	2,450	1%
9	Wexford	7,450	3%	22	Carlow	1,750	1%
10	Wicklow	7,350	3%	23	Laois	1,650	1%
11	Limerick	6,150	3%	24	Roscommon	1,450	1%
12	Sligo	4,800	2%	25	Offaly	1,400	1%
13	Meath	4,600	2%	26	Monaghan	1,000	< 1%

Data Source: Fáilte Ireland.



- Holiday Lets account for the highest share of bedspaces, at 88%. This supply varies significantly throughout the year and is likely to be impacted by the introduction of the STL Register in May 2026.
- At a county level, Dublin has the largest number of STL bedspaces with 22,950, or 15% of all STL bedspaces nationally. See the table to the right, for full breakdown.



Data Source: Fáilte Ireland, Lighthouse Intelligence Inc.  
Figures may not sum exactly due to rounding.

Estimate STL: Bedspaces by county in Q1 2025							
Number of STL bedspaces and share of total STL bedspaces							
County		No. of bedspaces	Share of total bedspaces	County		No. of bedspaces	Share of total bedspaces
1	Dublin	22,950	15%	14	Kilkenny	2,400	2%
2	Kerry	19,750	13%	15	Leitrim	2,400	2%
3	Donegal	16,850	11%	16	Limerick	2,300	2%
4	Galway	16,750	11%	17	Louth	2,250	1%
5	Cork	13,800	9%	18	Kildare	1,800	1%
6	Mayo	10,050	7%	19	Roscommon	1,700	1%
7	Clare	9,550	6%	20	Cavan	1,600	1%
8	Wexford	5,800	4%	21	Westmeath	1,250	1%
9	Waterford	3,550	2%	22	Laois	1,000	1%
10	Wicklow	3,450	2%	23	Carlow	900	1%
11	Sligo	3,400	2%	24	Offaly	850	1%
12	Tipperary	2,850	2%	25	Monaghan	800	1%
13	Meath	2,650	2%	26	Longford	450	< 1%

Data Source: Fáilte Ireland, Lighthouse Intelligence Inc.

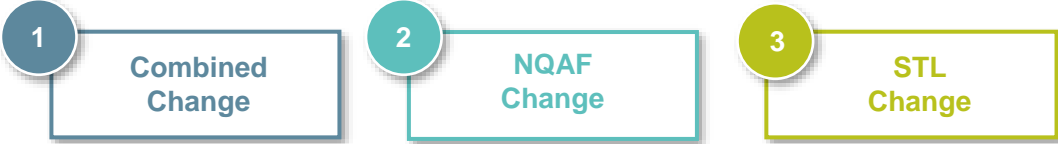


## 2. Change in Bed Stock





This section measures the change in the number of tourist accommodation bedspaces in Q1 2025 versus Q2 2024 (9-month period), the most recent reporting period. Change is measured across both master categories and counties. The change measurement is split into three separate groupings, as follows:

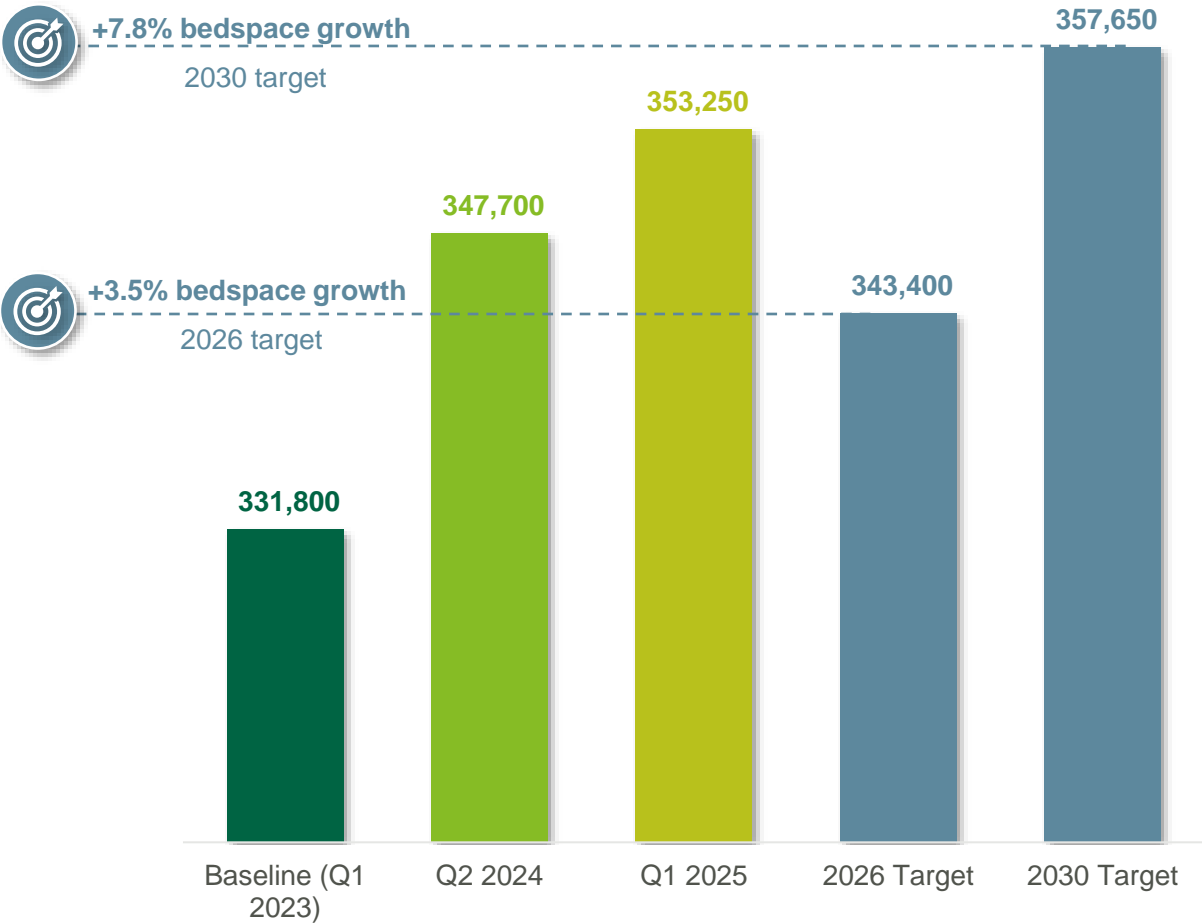


The change in the number of tourist accommodation bedspaces in Q1 2025 versus the baseline (Q1 2023) has also been calculated and is included in Appendix B. It is essential to consider the data methodology and limitations to ensure correct interpretation of this change. For a detailed explanation and valuable context, please refer to Appendix A.

### Combined Change:

- The adjacent chart displays the change in the number of bedspaces in the estimated combined dataset in Q1 2025 versus the baseline and Q2 2024.
- Bedspace growth in Q1 2025 has already significantly outpaced Fáilte Ireland’s bedspace target for 2026. However, this growth is driven by increased STL bedspaces. This portion of the market is both transient and seasonal in nature and is more difficult to monitor.
- Due to the nature of STL properties, it is important to note this growth may not reflect permanent growth or new stock.
- The Short-Term Letting Register is due to be implemented in May 2026, and international evidence suggests that the supply of STL accommodation reduces upon the introduction of such regulation as the market adjusts.
- The introduction of the Register will allow for more robust data and visibility of the STL market.

Estimate Combined Stock: Change in the number of bedspaces



Data Source: Fáilte Ireland, Lighthouse Intelligence Inc  
Figures may not sum exactly due to rounding.



# Estimate Combined Supply – Change versus Q2 2024



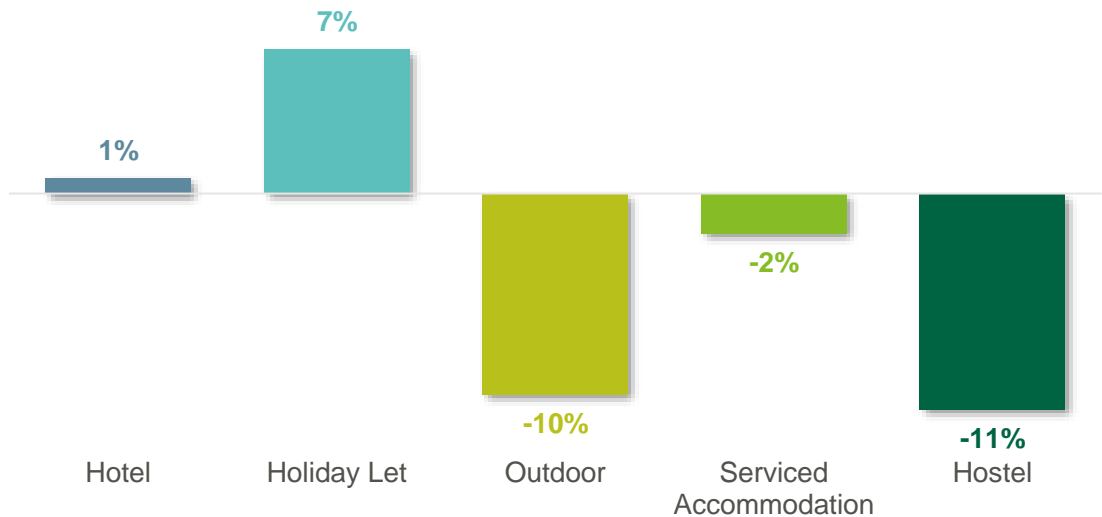
**+ 5,550**  
**Combined bedspaces**  
Versus Q2 2024



**+2%** **Change** in estimate combined  
bedspaces in Q1 2025 versus Q2 2024

- The supply of estimate combined bedspaces increased by 2%, or 5,550 bedspaces in Q1 2025 in comparison with the previous reporting period of Q2 2024.
- This was due to a significant increase in Holiday Let bedspaces in STL supply. Hotel bedspaces increased by 1%, while the remaining three categories recorded contractions in bedspace numbers during this period.

**Estimate Combined: Bedspace change by category**  
Change versus Q2 2024



Data Source: Fáilte Ireland, Lighthouse Intelligence Inc.  
Figures may not sum exactly due to rounding.

**Estimate Combined: Bedspace change by county**  
Change versus Q2 2024

	County	Change in bedspaces	Change (%)		County	Change in bedspaces	Change (%)
1	Monaghan	+150	+10%	14	Galway	+550	+2%
2	Laois	+200	+8%	15	Westmeath	+50	+2%
3	Offaly	+100	+8%	16	Cavan	+50	+2%
4	Kildare	+350	+6%	17	Kerry	+600	+2%
5	Roscommon	+150	+6%	18	Donegal	+400	+1%
6	Dublin	+4,300	+5%	19	Longford	+20	+ <1%
7	Louth	+250	+5%	20	Meath	+10	+ <1%
8	Wicklow	+350	+4%	21	Clare	-10	- <1%
9	Limerick	+300	+4%	22	Sligo	-15	- <1%
10	Kilkenny	+200	+3%	23	Leitrim	-10	- <1%
11	Carlow	+50	+2%	24	Waterford	-50	-1%
12	Cork	+600	+2%	25	Mayo	-200	-1%
13	Tipperary	+100	+2%	26	Wexford	-2,950	-19%

Data Source: Fáilte Ireland, Lighthouse Intelligence Inc.  
Figures may not sum exactly due to rounding.

# NQAF Supply – Change versus Q2 2024



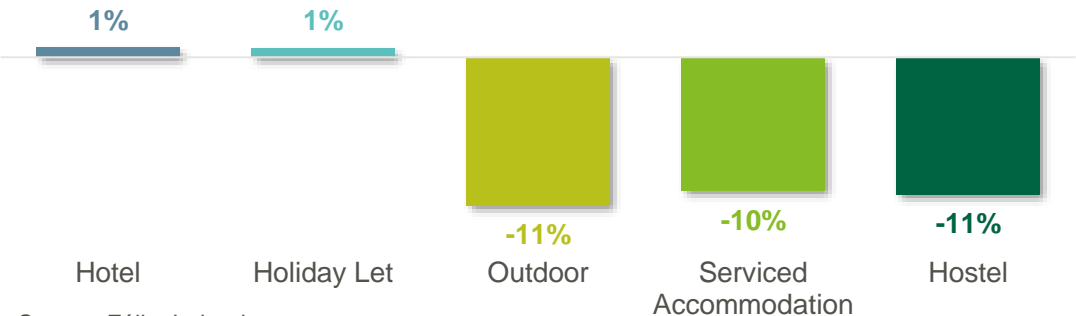
- 4,750  
NQAF bedspaces  
Versus Q2 2024



-2% Change in NQAF bedspaces in Q1  
2025 versus Q2 2024

- NQAF bedspaces decreased by 2%, or by 4,750 bedspaces versus Q2 2024. Hotel and Holiday Lets each recorded marginal increases of 1%, while the remaining three categories declined by 10% - 11%.
- The significant decline in Wexford contributed substantially to the overall NQAF bedspace reduction. This was due to the loss of an Outdoor property in Wexford with 3,660 bedspaces from the NQAF Register. This site has transitioned from a tourist facility to a static caravan model. Leitrim recorded the largest increase, albeit coming from a low base. On a nominal basis, Dublin recorded the largest increase, boosted by the opening of properties of scale such as the Ruby Molly Hotel & Bar (550 bedspaces) and the Clink i Lár Hostel (630 bedspaces).
- As of Q1 2025, a number of properties are going through the NQAF registration process which are not captured within this NQAF dataset. Notable examples include Radisson Red Galway (354 bedspaces), Moxy Cork City (306 bedspaces) and Residence Inn Cork (106 bedspaces). Once NQAF registered, these bedspaces will form part of future iterations of this analysis.

NQAF: Bedspace change by category  
Change versus Q2 2024



Data Source: Fáilte Ireland.  
Figures may not sum exactly due to rounding.

NQAF: Bedspace change by county  
Change versus Q2 2024

	County	Change in bedspaces	Change (%)		County	Change in bedspaces	Change (%)
1	Leitrim	+250	+11%	14	Cork	-100	-1%
2	Monaghan	+50	+3%	15	Longford	-50	-1%
3	Carlow	+50	+3%	16	Louth	-50	-2%
4	Laois	+50	+3%	17	Tipperary	-100	-2%
5	Dublin	+1,600	+2%	18	Meath	-100	-2%
6	Roscommon	+50	+2%	19	Kerry	-500	-2%
7	Westmeath	+50	+1%	20	Galway	-400	-2%
8	Wicklow	+100	+1%	21	Waterford	-200	-3%
9	Kildare	+50	+1%	22	Donegal	-500	-4%
10	Offaly	+5	+ <1%	23	Clare	-500	-5%
11	Limerick	-10	- <1%	24	Cavan	-150	-5%
12	Kilkenny	-15	- <1%	25	Mayo	-600	-6%
13	Sligo	-20	- <1%	26	Wexford	-3,650	-33%

Data Source: Fáilte Ireland.  
Figures may not sum exactly due to rounding.



# Estimate STL Supply – Change versus Q2 2024



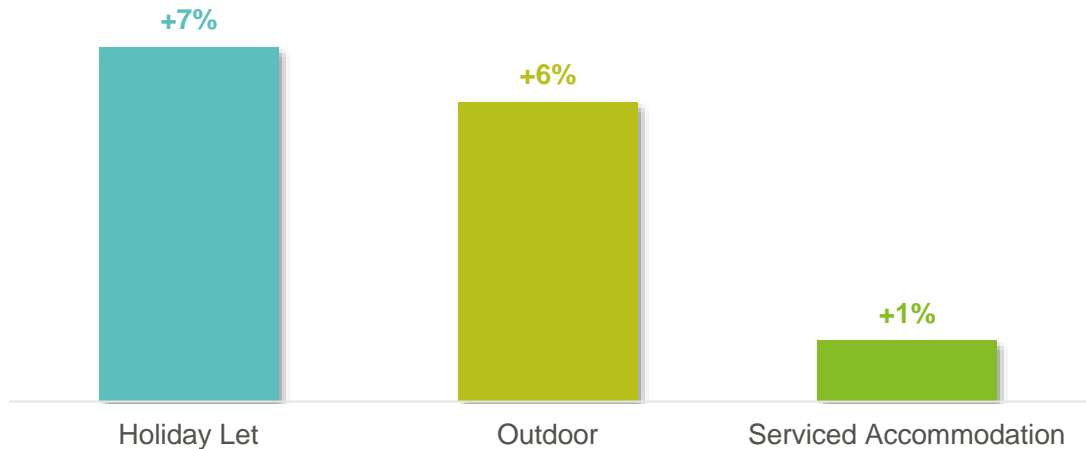
**+ 9,300**  
**STL bedspaces**  
Versus Q2 2024



**+7%** **Change** in estimate STL bedspaces  
in Q1 2025 versus Q2 2024

- The estimated number of STL bedspaces increased by 7% in Q1 2025 versus Q2 2024.
- Holiday Let bedspaces increased by 7%, closely followed by Outdoor bedspaces at 6%. Meanwhile Serviced Accommodation bedspaces grew by 1%.
- Kildare recorded the greatest growth rate at 17%, while estimate STL bedspaces in Leitrim declined by 0.4%, the only county in which a contraction occurred.

**Estimate STL: Bedspace change by category**  
Change versus Q2 2024



Data Source: Fáilte Ireland, Lighthouse Intelligence Inc.  
Figures may not sum exactly due to rounding.

**Estimate STL: Bedspace change by county**  
Change versus Q2 2024

County		Change in bedspaces	Change (%)	County		Change in bedspaces	Change (%)
1	Kildare	+250	+17%	14	Kilkenny	+150	+6%
2	Laois	+150	+17%	15	Galway	+950	+6%
3	Offaly	+100	+16%	16	Longford	+30	+6%
4	Dublin	+2,750	+14%	17	Carlow	+50	+5%
5	Wexford	+650	+13%	18	Cork	+650	+5%
6	Louth	+250	+12%	19	Donegal	+650	+4%
7	Cavan	+150	+12%	20	Kerry	+750	+4%
8	Limerick	+200	+11%	21	Clare	+300	+3%
9	Monaghan	+50	+9%	22	Waterford	+100	+3%
10	Tipperary	+250	+9%	23	Mayo	+250	+3%
11	Roscommon	+150	+9%	24	Westmeath	+20	+1%
12	Meath	+200	+8%	25	Sligo	+20	+1%
13	Wicklow	+200	+7%	26	Leitrim	-10	-<1%

Data Source: Fáilte Ireland, Lighthouse Intelligence Inc.  
Figures may not sum exactly due to rounding.







## Decline in NQAF supply

The stock of NQAF bedspaces has decreased by 2%, or 4,750 bedspaces versus the Q2 2024. While Hotel and Holiday Let bedspaces each increased by 1%, all other categories recorded declines, ranging between 10% – 11%.

The NQAF register requires close monitoring as this dataset is the most robust measure of tourist accommodation. While a decline has been experienced versus Q2 2024, it is estimated that some of the stock that no longer features on the NQAF register continue to operate as tourist accommodation. To ensure the market has a steady supply of tourist accommodation, that can be accurately tracked, it is essential that the NQAF remains as a stable source of tourist accommodation stock.



## Growth in STL supply

Estimate STL bedspaces increased by 7%, or 9,300 bedspaces, in Q1 2025 compared to Q2 2024. Holiday Let bedspaces grew by 7%, closely followed by Outdoor at 6%, while Serviced Accommodation bedspaces increased by 1%.

Consistent growth in STL stock has resulted in Fáilte Ireland exceeding its 2026 bedspace growth target however, this may be temporary. At present, the STL market is difficult to monitor accurately. The STL Register, which is due to be implemented by Fáilte Ireland in May 2026, should bring some clarity regarding the scale of this portion of the market. However, the Register may impact the number of properties available for STL tourist accommodation. International evidence indicates that similar legislation in other regions has resulted in a contraction in STL stock.



## Decline in Serviced Accommodation

The downward trend in registered properties within NQAF Serviced Accommodation continued into Q1 2025. This segment plays an important role in the regional tourist accommodation market, with over 80% of this stock based outside of Dublin as of Q1 2025.

While declines across NQAF Serviced Accommodation are evident, it is broadly assumed that many of these properties continue to operate outside the NQAF and remain active in the tourist accommodation market.

### 3. The Development Pipeline



# Introduction to Development Pipeline



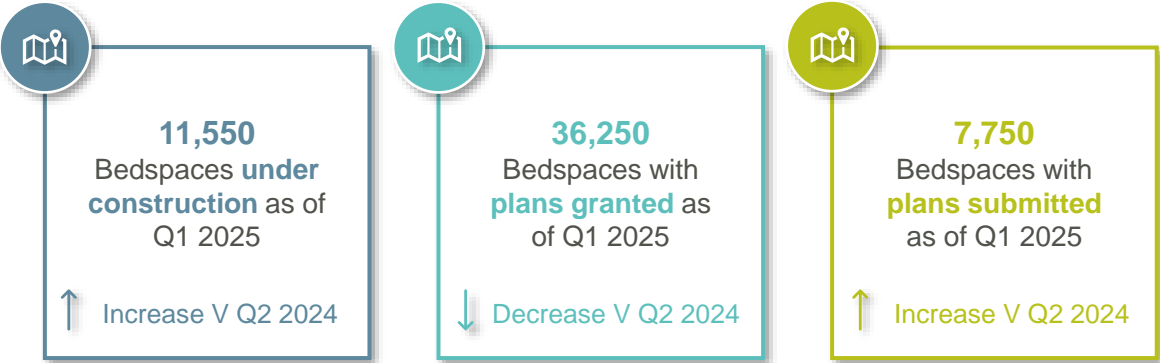
While the previous chapters analysed the change in tourist accommodation bedspaces up to Q1 2025, this chapter looks forward. Analysing the pipeline of tourist accommodation in Ireland is crucial to assess future capacity and growth potential within the sector.

This data provides an insight into the anticipated increase in bedspaces by location and by category. The master categories assigned are based on details included in the planning application submission.

It should be noted, that development pipeline data has limitations. For a comprehensive understanding of how the development pipeline is monitored and analysed, please refer to [Appendix C](#).

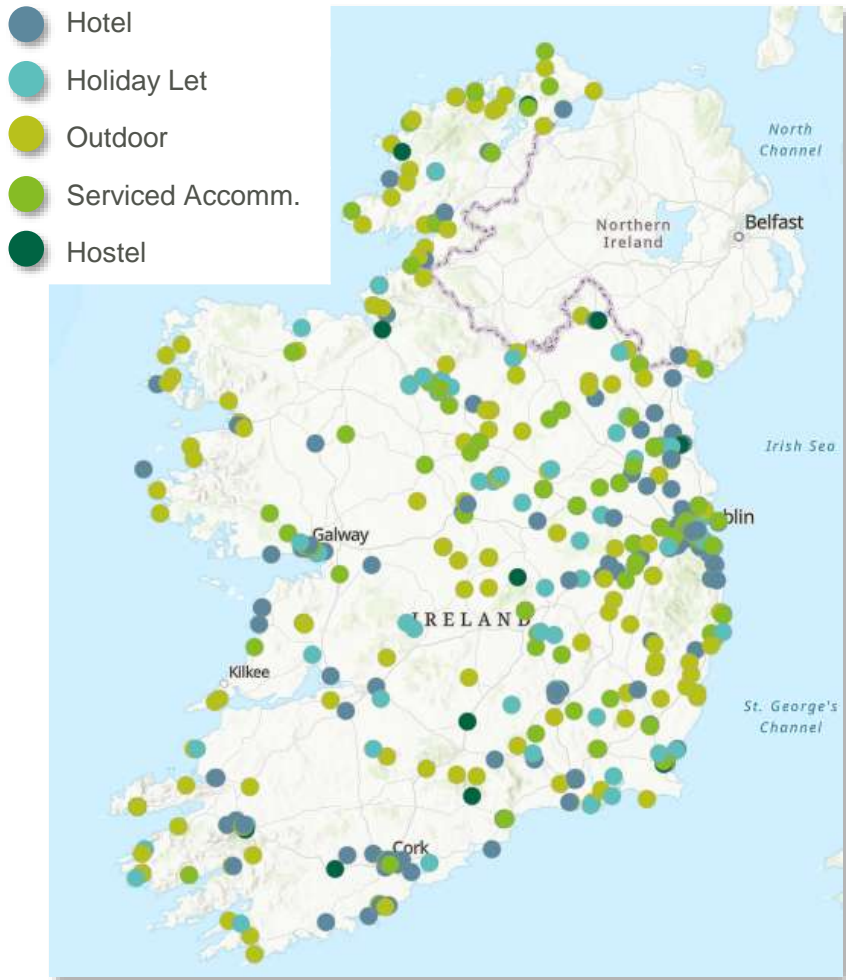
The remainder of this section presents the development pipeline for tourist bedspaces in Ireland in the following manner:

- Under construction
- Planning permission granted but not yet under construction
- Planning permission submitted and awaiting local authority decision



Data Source: CIS and Deloitte Real Estate Research.  
Figures may be impacted due to rounding.

Bedspaces in the development pipeline by master category



Data Source: CIS, Deloitte Real Estate Research.



# Under Construction



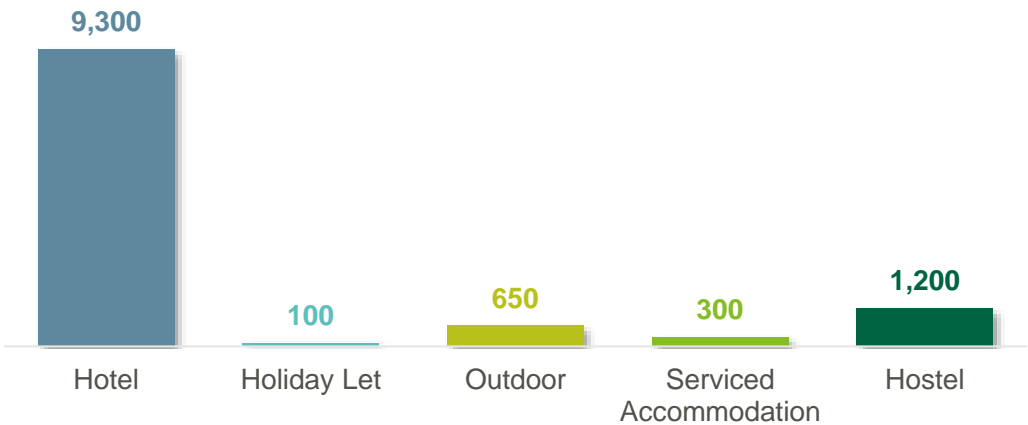
**11,550**  
Bedspaces **under construction** as of Q1 2025



**+64%** **Change** in Q1 2025  
versus Q2 2024

- 11,550 bedspaces were under construction at the end of Q1 2025, a notable rise from the 7,050 which were under construction as of Q2 2024.
- Hotels account for 80%, while Hostels account for 10%.
- Dublin dominates activity, accounting for 86% of all bedspaces under construction, and 93% of Hotel bedspaces under construction.
- Outside of Dublin, there were 1,600 bedspaces under construction, with Outdoor and Hotel accounting for 41% and 38% of this.
- Regional activity is dispersed. Waterford, Meath, Leitrim, Mayo and Kerry absorb nearly 950 of the bedspaces under construction outside Dublin

Bedspaces under construction by category as of Q1 2025



Data Source: CIS and Deloitte Real Estate Research.  
Figures may be impacted due to rounding.

Bedspaces under construction by category



Dublin



Dublin City Centre



Data Source: CIS and Deloitte Real Estate Research.  
Map points are adjusted by number of bedspaces, with a larger circle reflecting a higher number of bedspaces.



## Hotel schemes are all located in Dublin

0

The number of **Hotel** bedspaces which **commenced construction** located **outside Dublin**.

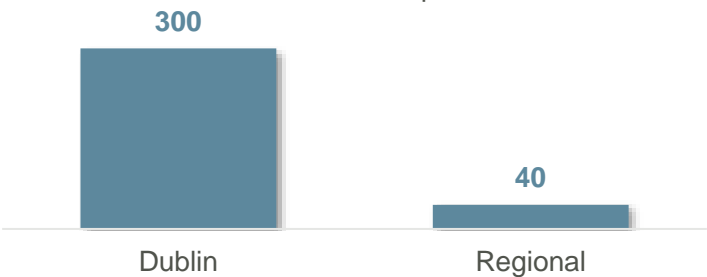
Q2 2024 – Q1 2025

### Largest schemes

- Hotels account for the largest share of construction activity (80%), with the top 5 projects of scale under construction located in Dublin (see top right table).
- The only Hostel listed in the top 5, commenced construction in March 2025. The scheme, by Red Rock Developments, originally sought planning for co-living units. Following its refusal, it pivoted to an aparthotel before receiving planning permission for a hostel in 2024.
- Other large schemes, which commenced construction between Q2 2024 and Q1 2025, are listed in the bottom right table.
- Over 6,250 bedspaces commenced construction during this time period, with Hotels accounting for 75% (4,750). Further illustrating the concentration of new supply, 90% of these Hotels are located in Dublin City.

### Average size of schemes under construction

No. of bedspaces



## Largest projects under construction

Property	Rooms	Bedspaces	Expected Completion
Hotel & Aparthotel, D1	474	1,150	2026
Sofitel Hotel Dublin Airport	412	1,000	2026
Hilton Home2 Suites, D1	296	700	2026
Hostel, D1	140	650	2027
Citizen M, D8	245	600	2025

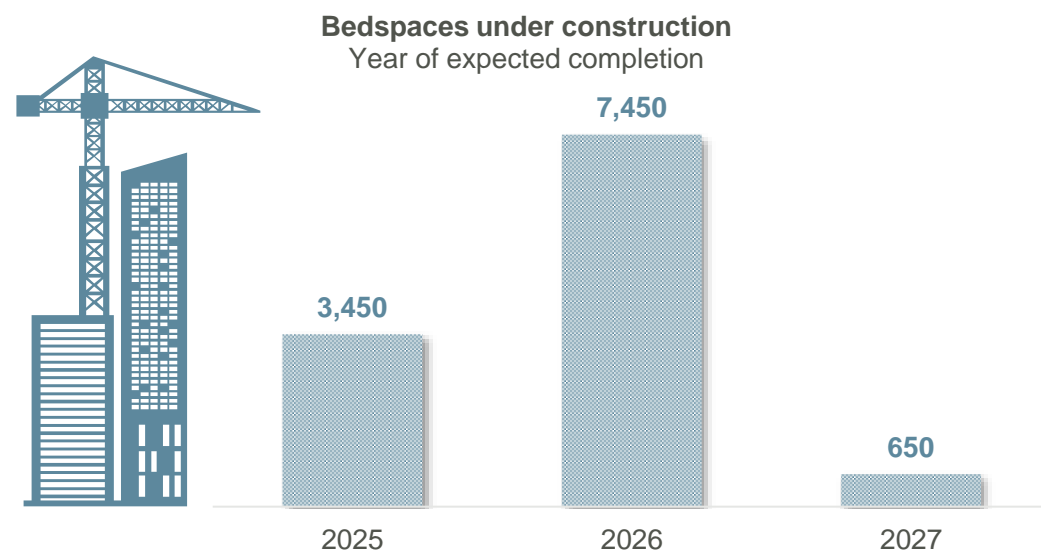


## Largest projects to commence construction, Q2 2024 – Q1 2025

Property	Rooms	Bedspaces	Commenced
Hotel & Aparthotel, D1	474	1,150	Aug '24
Hostel, D1	412	1,000	Mar '25
Premier Inn Castleforbes, D1	219	525	Feb '25
Hostel, D2	200	500	Jan '25
Maldron Hotel Croke Park, D3	245	600	Sep '24

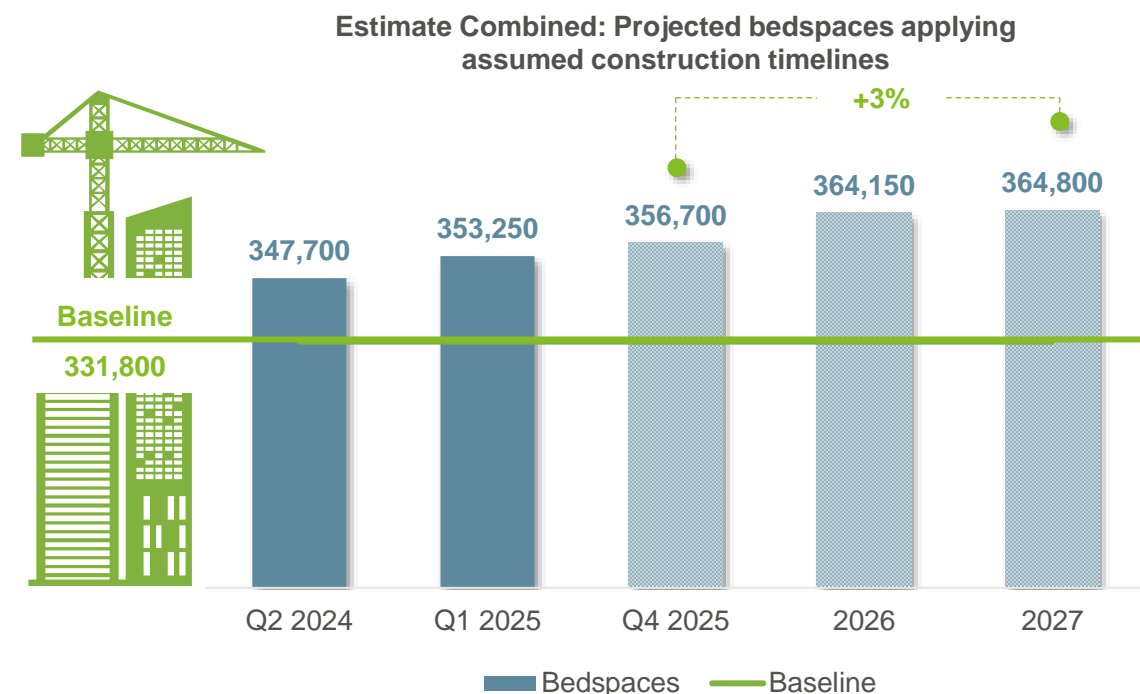
## Delivery timelines

- Fáilte Ireland has defined bedspace growth targets for 2026 and 2030. To gauge delivery progress against these targets, it is helpful to ascertain when the stock which is currently under construction will reach the market.
- The chart below illustrates the expected year of completion of all stock which is currently under construction. It is expected that all stock under construction at present will reach completion by the end of 2027.
- While construction timelines are helpful, they are based on the assumption that there are no delays or changes to current project timelines. Therefore, these delivery numbers are indicative only and may change over time.



## Impact on current stock

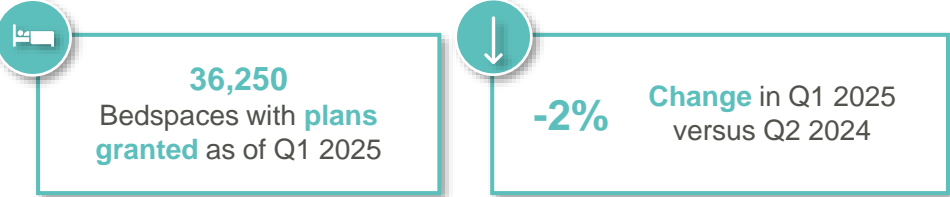
- Based on expected construction timelines for the bedspaces under construction, it is estimated that total bedspace stock will grow by +3% from Q1 2025 to Q4 2027. This estimate assumes that there is no change to the existing stock (i.e. no bedspaces removed due to closure etc. or bedspaces added to the NQAF or STL). If construction starts on other schemes in the interim, there is potential for this change to rise further.



- If all bedspaces which are currently under construction were added to the existing NQAF stock, this portion of the market would increase to 238,300 bedspaces by the end of 2026.

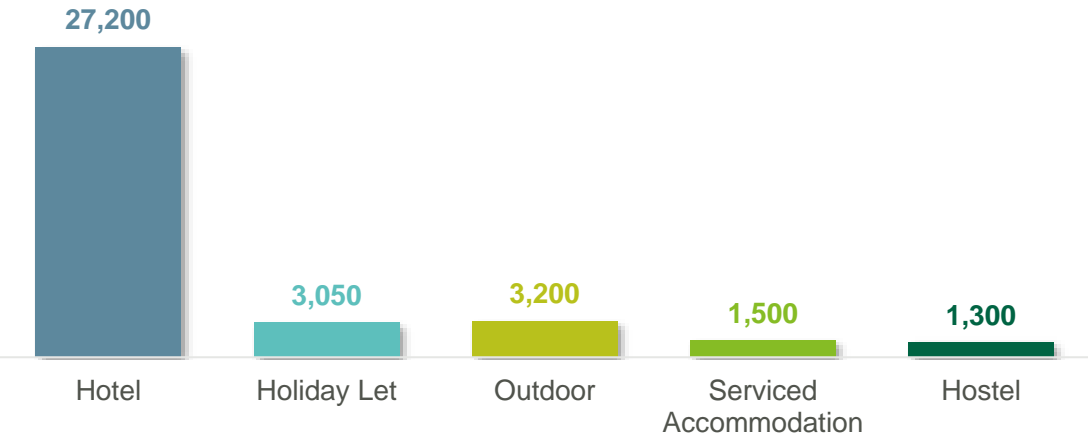


# Planning Permission Granted

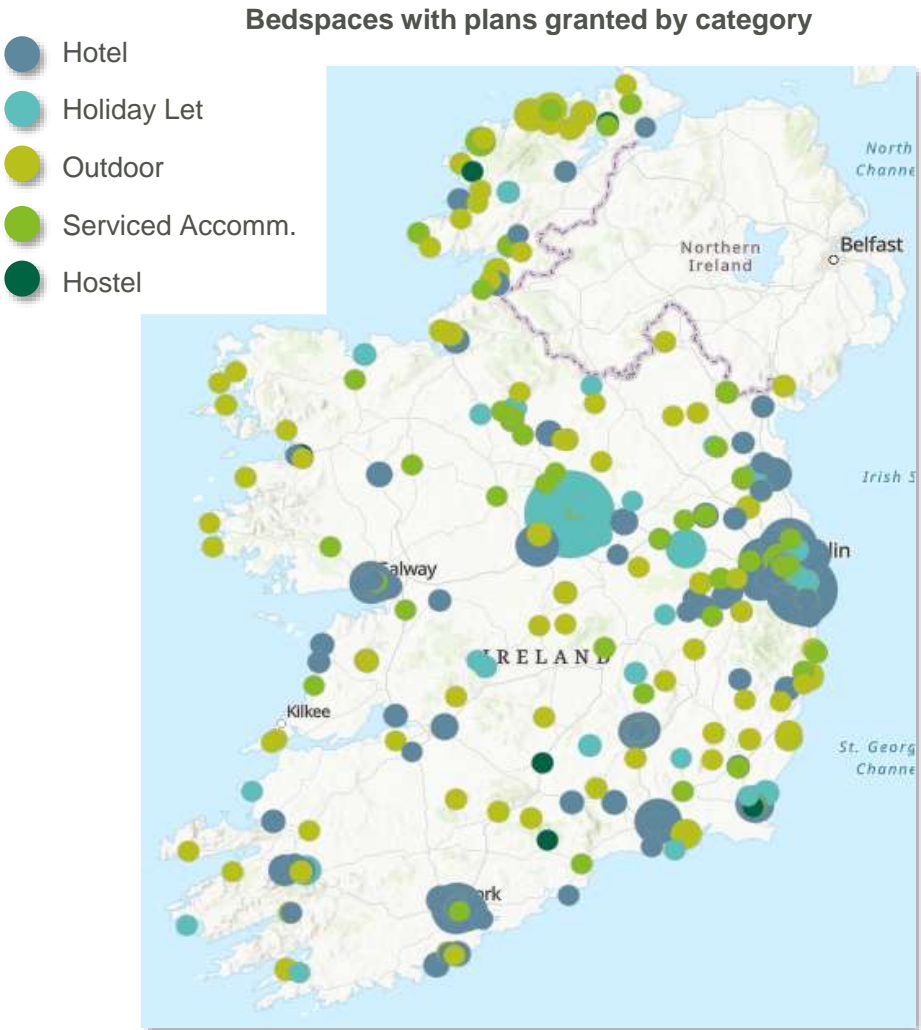


- An estimated 36,250 bedspaces have plans granted across 333 projects. In terms of bedspaces, this represents a fall of 2% on Q2 2024. In volume terms, the number of projects exceeds that of Q2 2024 (300). This suggests that a number of large-scale projects commenced construction, moving from plans granted to under construction. It may also suggest that the projects which have been granted planning in the interim are smaller scale developments.
- It is important to note that not all projects with plans granted will proceed to construction. Although planning permission has been granted, some projects face appeal, the site may be on the market for sale, feasibility studies for the development are ongoing or it has been indicated that construction is likely not to commence for some time.

Bedspaces with plans granted by category



Data Source: CIS and Deloitte Real Estate Research.  
Figures may be impacted due to rounding.



Data Source: CIS and Deloitte Real Estate Research.  
Map points are adjusted by number of bedspaces, with a larger circle reflecting a higher number of bedspaces.

## Regional analysis

- Bedspaces with plans granted are heavily weighted towards hotels (75%). Hotels in Dublin account for 60% of all bedspaces which have been granted planning nationwide. In Dublin alone, hotels account for 91% of all bedspaces which have been granted planning, see table to the right.
- Outdoor accounts for 9% of all bedspaces with plans granted, an increase from Q2 2024. Planning permissions in the Outdoor category increased notably in the final months of 2024, with the largest being a new camper van park (110 bedspaces) in Rosstown, Donegal.
- Cork, Galway, and Longford are the remaining counties with the largest volume of bedspaces granted, which is presented in the table to the right.
- In Longford, an expansion at Center Parcs accounts for the vast majority of bedspaces with plans granted in the pipeline. As of the end of March 2025, ground works are under way on site, largely relating to tree clearing and other works. Construction of lodges has not yet commenced therefore the status of this development remains at plans granted stage.



### Donegal leads the way for Outdoor plans granted

**33%** One in three Outdoor bedspaces which have been granted planning are located in Donegal in caravan, camping and glamping sites.



## Bedspaces with plans granted, top counties

	Bedspaces	Largest Category No. of Bedspaces
Dublin	18,200	16,500
Cork	3,050	2,750
Donegal	1,750	1,050
Galway	1,650	1,600
Longford	1,500	1,400

● Hotel ● Holiday Let ● Outdoor ● Serviced Accommodation ● Hostel



## Conversion from plans granted to commencement of construction

The analysis suggests hotels in Dublin account for 60% of all bedspaces granted planning. Recent research\*, which studied Hotel, Hostel and Aparthotel schemes, from plans submitted through to completion stage, noted that between 2015 – 2024, just 43% of planning applications granted permission subsequently commenced construction. Although this analysis was based on the number of schemes, rather than bedspaces, it nonetheless is important when assessing pipeline activity.

\* Planning to Practical Completion Conversion Rates: An Analysis of Dublin Hotel Development: 2015 – 2024  
Data Source: CIS and Deloitte Real Estate Research.  
Figures may be impacted due to rounding.

# Planning Application Submitted



7,750

Bedspaces with **plans submitted** as of Q1 2025



**+29%** **Change** in Q1 2025  
versus Q2 2024

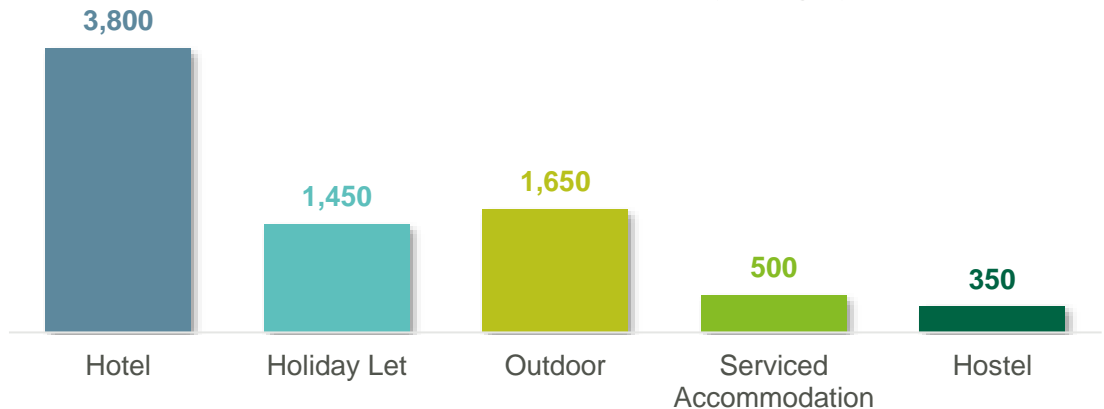
- Just under half (49%) of all tourist accommodation with plans submitted are in Hotels. Outdoor is next with a 21% share of the total, closely followed by Holiday Lets at 19%. Serviced Accommodation and Hostels account for 6% and 5% respectively.
- The county with the highest proportion of bedspaces with plans submitted is Dublin, with 2,250 bedspaces, or 29% of the national total. Kerry follows with 18%, with Cork next at 10%.



## Growth in plans submitted for Outdoor and Holiday Let

Of the **2,650** bedspaces which are new to the plans submitted category, just 35% are Hotel bedspaces. There has been notable growth in **Outdoor** and **Holiday Let**.  
*Q2 2024 – Q1 2025*

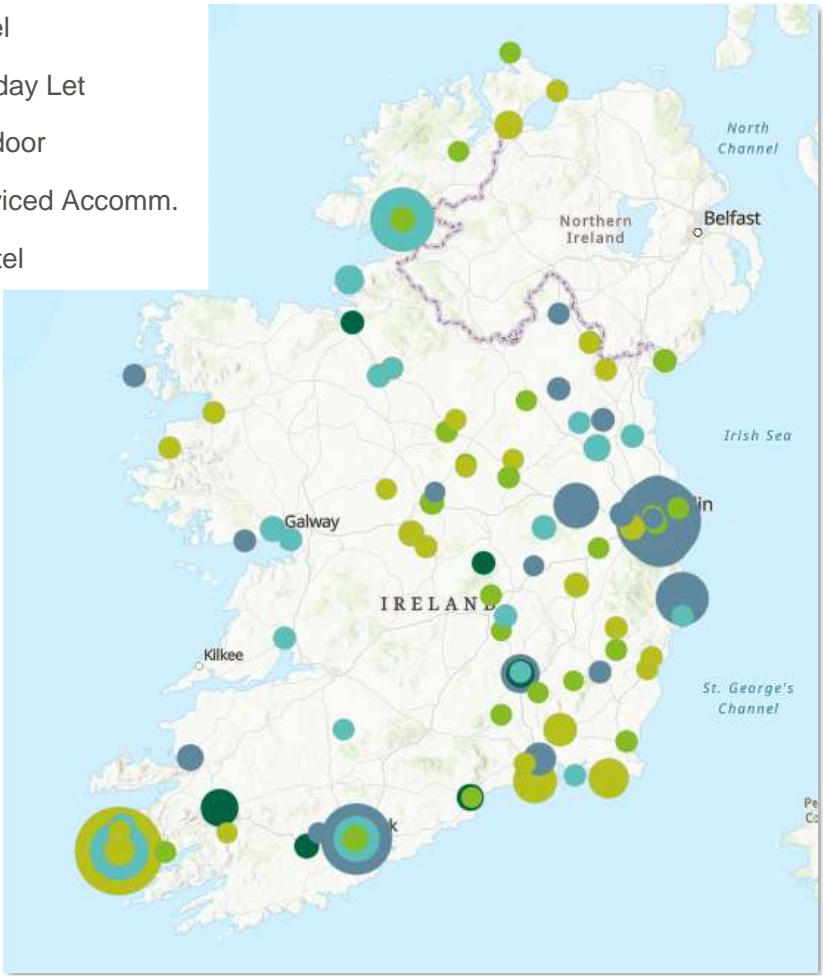
Bedspaces with plans submitted by category



Data Source: CIS and Deloitte Real Estate Research.  
Figures may be impacted due to rounding.

Bedspaces with plans submitted by category

- Hotel
- Holiday Let
- Outdoor
- Serviced Accommodation
- Hostel



Data Source: CIS and Deloitte Real Estate Research.  
Map points are adjusted by number of bedspaces, with a larger circle reflecting a higher number of bedspaces.



## Rise in construction activity is confined to Dublin

The volume of bedspaces under construction in Q1 2025 is approximately 64% higher than in Q2 2024. However, this rise is concentrated in Dublin City, particularly in Hotels. Outside the capital, construction activity is significantly more subdued.

This means that any future growth in bedspace capacity is likely to be also concentrated in Dublin.

In *Tourist Accommodation Outlook: Ireland's Capacity and Pipeline, October 2024*, viability was identified as a key challenge to the delivery of new Hotel bedspaces outside of Dublin.



## Rise in Outdoor planning applications

Hotels account for 75% of bedspaces with plans granted, but just under half (49%) of all bedspaces with plans submitted. Analysis of schemes with plans submitted reveals this decline in Hotels and an increase in Outdoor and Holiday Lets. Planning applications have increased for **glamping pods, huts, camping and caravan pitches**.

It remains too early to assess if this trend will lead to an increase in bedspaces delivered in these categories. As of Q1 2025, (estimated combined stock) Outdoor bedspaces were down 9% versus the baseline. However, there is a stark contrast in this trend in STL (+16%) versus NQAF (-11%).



## Hotel conversion ratios should be considered

The analysis suggests Hotels in Dublin account for **60% (16,500) of all bedspaces** nationwide with plans granted as of Q1 2025. Recent research commissioned by Fáilte Ireland, which studied the planning cycle of Hotel, Hostel and Aparthotels in Dublin (2015 – 2024), found that **just 43% of planning applications granted permission ultimately commenced construction**. If one were to apply the same rate here, it would mean an estimated **7,100** bedspaces would progress to construction.

Although this analysis was based on the number of schemes, rather than bedspaces, it nonetheless details the potential attrition on pipeline numbers and the impact on future stock within the market.



## Pipeline trends provide a mixed message for future stock

Trends within the pipeline data provide a mixed message for future stock. Positively, the **volume of bedspaces under construction rose**. In contrast, the **volume of bedspaces with plans granted declined**. This may be due to 1) large schemes moving from plans granted to construction (which is positive) and 2) may also reflect a lack of similar, large-scale schemes moving from plans submitted to plans granted (which is negative).

If this trend were to continue, even if pipeline was healthy with new schemes moving through the development pipeline, the volume of new bedspaces added to stock in future years may decrease as schemes of smaller scale have a greater presence.



## Appendices



# Appendix A - Baseline Dataset and Change Measurement



The baseline dataset is as of Q1 2023. It is discussed in three forms, as follows:

## 1. NQAF Baseline:

- Fáilte Ireland's National Quality Assurance Framework (NQAF) comprises a combination of statutory and non-statutory tourist accommodation registers. The statutory registers contain all tourist accommodation in Ireland, which uses [prescribed terms](#), such as hotel. The non-statutory register is composed of voluntary schemes where the proprietor chooses to become quality approved under the NQAF. NQAF data is as of March 2023 and is referred to as Q1 2023 throughout this report and subsequent reports.

## 2. Estimate STL Baseline:

- The estimate STL baseline is composed of data which Fáilte Ireland has acquired from Lighthouse Intelligence Inc. This data has been collated by 'indexing' or 'scraping' publicly available information from property listings published on the four major booking platforms: Airbnb, Booking.com, TripAdvisor and VRBO.
- STL data is received in the form of properties and guest capacity, which may include capacity in addition to bedspaces (e.g. if a sofa bed is available in the property. For the purposes of this report, capacity is used as a proxy for bedspaces and will be referred to as bedspaces throughout the report.
- The majority of properties within the STL dataset are not registered or approved with Fáilte Ireland under the NQAF.

## 3. Estimate Combined Baseline:

- This dataset is composed of the STL baseline and certain categories within the NQAF dataset. As some properties registered or approved under the NQAF may be listed on one or more of the four booking platforms, from which the STL data is 'scraped', a subtraction from the NQAF dataset has been applied to avoid duplicate entries.
- Subtraction was applied across:
  - B&Bs (up to and including six bedrooms),
  - Guesthouses,
  - Historic Houses
  - Holiday Lets
  - Serviced accommodation (7-14 bedrooms).
- As a result of this assumed duplication and the subsequent subtraction process, the sum of the NQAF baseline and the sum of the STL baseline will not equal the combined baseline.

## NQAF Registration Process:

- We analyse trading properties that are going through the NQAF registration process. While undergoing registration, these properties are not included in any stock analysis. These properties and their accompanying bedspaces will only appear in stock once registered and trading.

## Data Limitations:

- The STL data appears to show seasonality, with the total volume of bedspaces peaking in July. This seasonality may skew the data. To mitigate this, a 12-month rolling average of STL stock is calculated. To align with the NQAF dataset, March 2023 is the starting point. The estimated STL baseline is arrived at by calculating the average of the monthly data from April 2022 through to March 2023. The baseline number is referred to as Q1 2023 throughout this series of reports.
- Due to its nature (i.e. transient, not permanent stock), the STL data cannot be regarded as definitive, however it is deemed as the best available data pending the introduction of the STL Register.
- The NQAF and STL datasets are not like for like in terms of their reporting and quality of data. Therefore, the combined baseline and the STL baseline are to be viewed strictly as estimate.

## Rounding:

- Bedspaces have been rounded to the nearest 50 across each dataset throughout this report.

# Appendix A - Baseline Dataset and Change Measurement



## Master Categories:

For ease of reporting, master categories have been assigned to both the NQAF and STL data. These are as follows; Hotels, Serviced Accommodation, Hostels, Outdoor, and Holiday Let. Hotels and Hostels are self-explanatory and appear only in the NQAF. All other master categories appear in both the STL and NQAF. Serviced Accommodation consists of B&Bs, guesthouses, townhouses. Outdoor consists of camping and glamping, while Holiday Let consists of self-catering apartments, cottages, holiday homes.

● NQAF dataset ● STL dataset

Hotels	Serviced Accommodation	Hostels	Outdoor	Holiday Let	
● Hotels	<ul style="list-style-type: none"> <li>● B&amp;B Ireland Framework</li> <li>● Bed and Breakfast</li> <li>● Bed and Breakfast – Country Home</li> <li>● Bed and Breakfast – Historic House</li> <li>● Bed and Breakfast - Townhouse</li> <li>● Bed and Breakfast – Farmhouse</li> <li>● Guesthouse</li> <li>● Bed and Breakfast</li> <li>● Guesthouse</li> </ul>	<ul style="list-style-type: none"> <li>● Hostel</li> <li>● Hostel – Holiday Hostel</li> <li>● Hostel – Youth Hostel</li> </ul>	<ul style="list-style-type: none"> <li>● Caravan &amp; Camping</li> <li>● Camping</li> <li>● Glamping</li> <li>● Boat</li> <li>● Glamping</li> <li>● RV</li> </ul>	<ul style="list-style-type: none"> <li>● Holiday Apartment</li> <li>● ISCF QA Framework</li> <li>● Self-Catering – Not Registered</li> <li>● Self-Catering – Cottages</li> <li>● Self-Catering – Listed</li> <li>● Self-Catering – Apartments</li> <li>● Self-Catering – Holiday Cottage</li> </ul>	<ul style="list-style-type: none"> <li>● Apartment</li> <li>● Bungalow</li> <li>● Castle</li> <li>● Chalet</li> <li>● House</li> <li>● Other</li> <li>● Townhouse</li> <li>● Villa</li> </ul>



# Appendix B - Estimate Combined Supply – Change versus Baseline



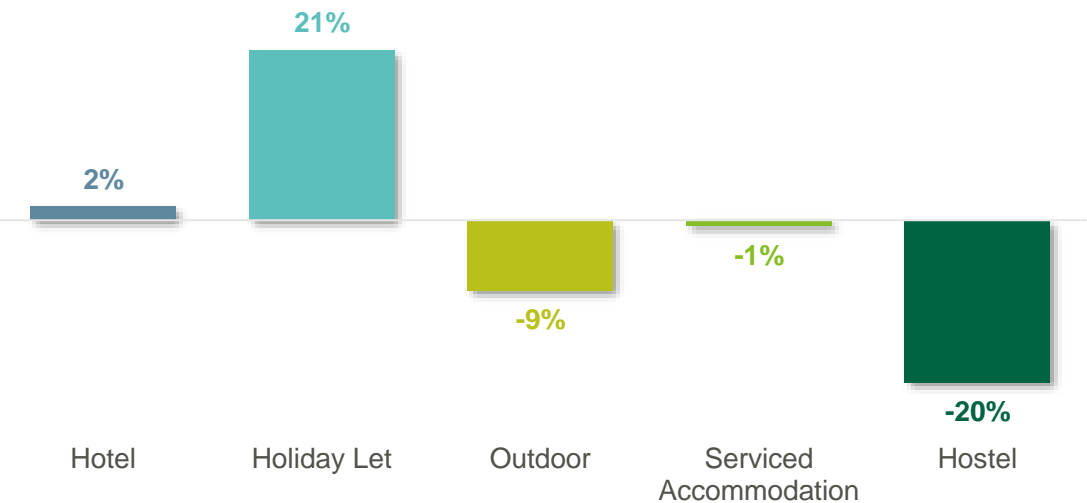
**+ 21,450**  
**Combined bedspaces**  
Versus baseline



**+6%** **Change** in estimate combined  
bedspaces in Q1 2025 versus baseline

- Estimate combined bedspaces increased by 6%, or 21,450 bedspaces in Q1 2025 versus the baseline period, Q1 2023. This was driven by growth in Holiday Let bedspaces in STL stock, however this stock is seasonal and transient in nature, and is more difficult to track than NQAF stock.
- At a county level, most counties recorded an increase in combined bedspaces. A substantial decline (-17%) in Wexford was driven by a reduction in NQAF stock, with further details available in the NQAF section.

**Estimate Combined: Bedspace change by category**  
Change versus baseline



Data Source: Fáilte Ireland, Lighthouse Intelligence Inc.  
Figures may not sum exactly due to rounding.


**Estimate Combined: Bedspace change by county**  
Change versus baseline

	County	Change in bedspaces	Change (%)		County	Change in bedspaces	Change (%)
1	Kildare	+850	+19%	14	Leitrim	+150	+5%
2	Laois	+350	+16%	15	Monaghan	+50	+4%
3	Dublin	+11,850	+16%	16	Waterford	+450	+4%
4	Offaly	+200	+14%	17	Limerick	+300	+4%
5	Wicklow	+1,100	+12%	18	Longford	+100	+4%
6	Louth	+450	+11%	19	Sligo	+250	+4%
7	Roscommon	+250	+11%	20	Donegal	+900	+4%
8	Meath	+550	+10%	21	Clare	+450	+3%
9	Carlow	+200	+9%	22	Kerry	+800	+2%
10	Westmeath	+300	+8%	23	Mayo	+300	+2%
11	Cork	+1,950	+7%	24	Tipperary	+100	+1%
12	Galway	+1,900	+7%	25	Kilkenny	-150	-2%
13	Cavan	+200	+5%	26	Wexford	-2,550	-17%

Data Source: Fáilte Ireland, Lighthouse Intelligence Inc.  
Figures may not sum exactly due to rounding.

# Appendix B - NQAF Supply – Change versus Baseline






- 4,650

NQAF bedspaces

Versus Baseline

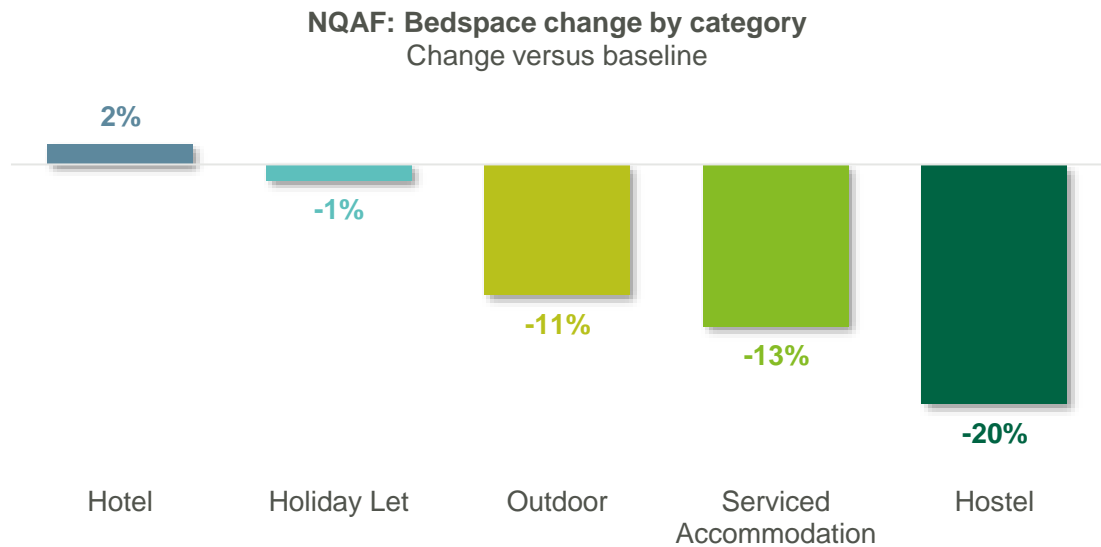


-2%

Change in NQAF bedspaces in

Q1 2025 versus baseline

- NQAF bedspaces declined by 2%, or 4,650 bedspaces in Q1 2025 compared to the baseline. While Hotel bedspaces increased by 2%, all other categories recorded declines, with Hostels declining most significantly, by 20%.
- On a regional basis, 10 counties recorded growth in the number of bedspaces, ranging from 1% - 5%. A significant decline was recorded in Wexford, due to the loss of an Outdoor property with over 3,650 bedspaces from the NQAF Register. This site has ceased operating as a tourist facility and has transitioned to a static caravan model. This also contributed substantially to the overall decline in Outdoor NQAF bedspaces, which total 29,600 bedspaces as of Q1 2025.



Data Source: Fáilte Ireland.  
Figures may not sum exactly due to rounding.


NQAF: Bedspace change by county							
Change versus baseline							
County		Change in bedspaces	Change (%)	County		Change in bedspaces	Change (%)
1	Westmeath	+150	+5%	14	Kerry	-550	-2%
2	Laois	+50	+5%	15	Galway	-400	-2%
3	Carlow	+50	+4%	16	Limerick	-150	-3%
4	Wicklow	+250	+3%	17	Louth	-100	-3%
5	Kildare	+150	+3%	18	Tipperary	-150	-3%
6	Dublin	+2,000	+3%	19	Kilkenny	-200	-5%
7	Longford	+100	+3%	20	Clare	-500	-5%
8	Meath	+50	+2%	21	Donegal	-650	-5%
9	Roscommon	+20	+1%	22	Mayo	-600	-6%
10	Cork	+150	+1%	23	Cavan	-150	-6%
11	Offaly	+5	+ <1%	24	Leitrim	-150	-7%
12	Waterford	-100	-1%	25	Monaghan	-150	-14%
13	Sligo	-100	-2%	26	Wexford	-3,650	-33%

Data Source: Fáilte Ireland  
Figures may not sum exactly due to rounding.



# Appendix B - Estimate STL Supply – Change versus Baseline






+ 23,600

STL bedspaces

Versus baseline

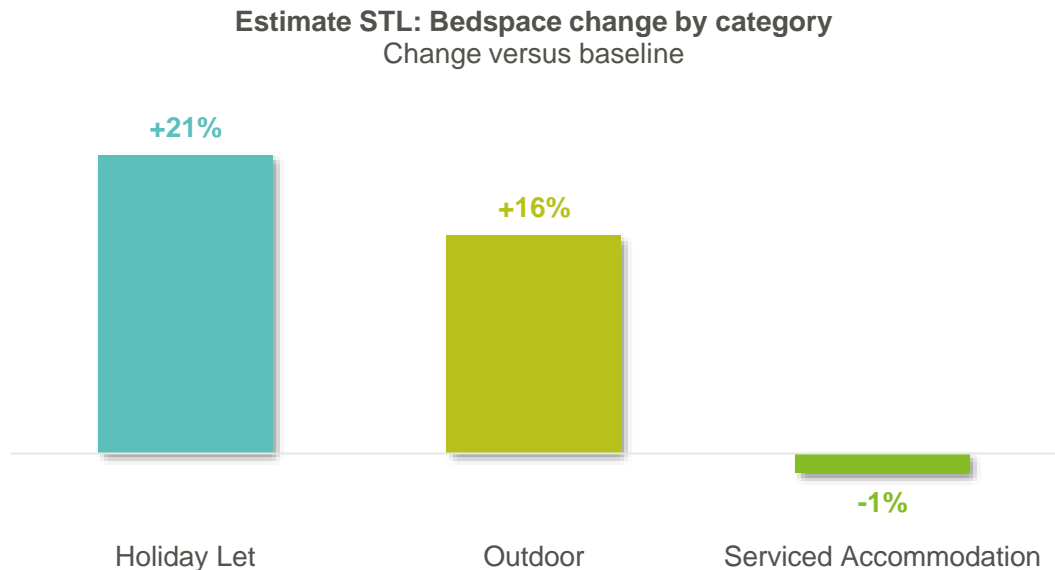


+18%

Change in estimate STL bedspaces

in Q1 2025 versus baseline

- The estimated number of STL bedspaces increased by 18% in Q1 2025 versus the baseline.
- This was driven by considerable growth in Holiday Let bedspaces (+21%).
- On a county basis, STL supply in Dublin has increased by a substantial 66% versus the baseline, resulting in an increase of 9,100 bedspaces.



Data Source: Fáilte Ireland, Lighthouse Intelligence Inc.  
Figures may not sum exactly due to rounding.

Estimate STL: Bedspace change by county							
Change versus baseline							
County		Change in bedspaces	Change (%)	County		Change in bedspaces	Change (%)
1	Dublin	+9,100	+66%	14	Roscommon	+250	+17%
2	Kildare	+700	+63%	15	Galway	+2,300	+16%
3	Laois	+300	+44%	16	Longford	+50	+12%
4	Meath	+750	+39%	17	Cork	+1,450	+12%
5	Offaly	+200	+33%	18	Tipperary	+250	+10%
6	Monaghan	+200	+29%	19	Sligo	+300	+10%
7	Wicklow	+750	+29%	20	Westmeath	+100	+9%
8	Cavan	+350	+27%	21	Donegal	+1,400	+9%
9	Louth	+450	+24%	22	Clare	+750	+9%
10	Limerick	+450	+24%	23	Leitrim	+150	+7%
11	Carlow	+150	+23%	24	Mayo	+650	+7%
12	Wexford	+1,050	+22%	25	Kerry	+950	+5%
13	Waterford	+550	+18%	26	Kilkenny	-20	-1%

Data Source: Fáilte Ireland, Lighthouse Intelligence Inc.  
Figures may not sum exactly due to rounding.





- Pipeline data used in this report was collated by Deloitte. This data was obtained using four external data sources: 1) Construction Information Services 2) E-planning 3) An Bord Pleanála and 4) National Building Control and Market Surveillance). For the first iteration of the Tourist Accommodation Outlook (October 2025), all projects identified as plans applied, plans granted and under construction from 2019 to the end of Q2 2024 were downloaded. This report has updated each of these entries to reflect their status as of Q1 2025. In some instances, entries were deleted (e.g. refused, expired, new information discovered). In addition, new schemes which have entered the planning system during July 2024 to March 2025 were also added.
- All entries were manually reviewed to verify the current development status of the project and categorise accommodation in line with Section 1 and Section 2 of this report. This process involves cross checking against all aforementioned sources, media outlets, accommodation websites, social media sites and direct contact, in some cases, to clarify the current status.
- Planning applications that were refused during the time period above were excluded from the dataset. Similarly, projects which had multiple planning applications were consolidated to show their most recent application to avoid duplication.
- It is possible for the accommodation category to change as the project progresses. It is also possible that although a project may be referred to as a hotel for example in the planning application, it may not be classified as a hotel according to the NQAF criteria.
- The number of bedrooms or units available under each scheme were derived from the planning application documents. These documents do not typically include the volume of bedspaces, which is a key metric for this project. Deloitte worked with Fáilte Ireland to develop an assumption for the number of bedspaces available per bedroom, unit or pitch, depending on the category. The number of bedspaces has been rounded to the nearest 50, in accordance with previous sections.
- In the case of Holiday Lets, a second level assumption was applied. For smaller one or two bed apartments labelled as “self-catering” in their planning documents, the same bedroom and bedspace assumption was applied as for Hotels and Guesthouses. This was to ensure these smaller holiday let units were not over inflated in terms of their bedspaces.

Bedspace assumptions by category

Accommodation Type	Units	Bedspaces
Hotel and Guesthouse	1 (bedroom)	2.4
B&B	1 (bedroom)	2.2
Holiday Lets	1 (front door)	7
Outdoor (e.g. glamping)	1 (unit)	3.3
Caravan and Camping	1 (pitch)	3.5
Hostel	1 (bedroom)	Case by case

Source: Fáilte Ireland and Deloitte.

- Completion date estimates are derived from CIS and where possible, verified through additional sources. These include media outlets, accommodation websites, social media sites and in some cases, direct contact. Completion dates should always be viewed as an estimate, even when obtained through direct contact with those delivering the schemes/bedspaces. Construction timelines often move, even within the last few months or weeks ahead of expected completion.
- Lastly, pipeline data is particularly challenging to track and therefore it is likely that revisions will occur throughout the dataset. It should be viewed as point in time only.

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