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Turasóireachta agus Fostaíochta
Department of Enterprise,
Tourism and Employment

Findings from the Public Consultation on the Development of a Tourist Accommodation Strategy

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Introduction:

In accordance with the commitments outlined in *A New Era for Irish Tourism*, the Department of Enterprise, Tourism and Employment is undertaking the development of a Tourist Accommodation Strategy. The intention of the Strategy is to ensure that Ireland has a diverse, future-focused mix of tourist accommodation that supports the long-term development of the sector, while continuing to deliver a competitive, high-quality tourism experience.

Once finalised, the Strategy will provide a framework for the sustainable development of tourist accommodation across Ireland, helping to ensure the sector is well positioned to respond to evolving visitor needs.

As part of the Strategy's development, the Department undertook a public consultation to gather views from members of the public, industry stakeholders and other interested parties.

Insights gathered through the consultation will contribute to the Strategy's development, ensuring it reflects stakeholder perspectives and addresses future accommodation needs across the tourism sector.

The purpose of this document is to present a summary of the findings from the responses received.

Public Consultation Process:

The consultation was conducted through an online survey hosted on the EU Survey Platform. The survey comprised a mix of closed and open-ended questions covering a range of key themes including accommodation capacity, regional balance, regulation, accessibility, sustainability, short-term letting accommodation and future demand.

The consultation was open for five weeks, from 27th April to 29th May 2026. Participation was open to members of the public, industry stakeholders and other interested parties. In total, 299 responses were received during the consultation period.

Alongside the survey responses, a small number of broader submissions were received and are summarised in Section 13.

Methodology and Analysis:

Response rates vary by question, as respondents could leave non-relevant questions blank. Therefore, percentages are based on valid responses only.

Quantitative responses were analysed using descriptive statistical methods, with results presented as frequencies and percentages. As respondents could select multiple options, percentages may not total 100%.

Qualitative responses submitted through open-ended questions were analysed using thematic analysis. Responses were reviewed, coded and grouped into recurring themes to identify the principal issues, concerns and suggestions raised by respondents. As individual responses could contain multiple themes, a single submission may have been assigned to more than one thematic category.

The material presented in the accompanying report reflects the views of those who chose to participate in the consultation and should not be interpreted as statistically representative of the wider population. Neither are they the subject of analysis by the Department. However, they provide valuable insights into stakeholder and public perspectives on the future development of Ireland's tourist accommodation sector.

Survey Findings:

Section 1: Profile of Respondents

The respondent profile indicates strong participation from tourism accommodation providers, particularly short-term letting operators. The consultation also captured perspectives from members of the public, tourism businesses, public bodies, community organisations and other tourism sector stakeholders.

Responses were received from participants across a range of geographic settings, including rural, urban and coastal communities, providing diverse perspectives on the opportunities and challenges facing Ireland's tourism accommodation sector.

1.1 Respondent Type

The respondent profile was heavily weighted towards tourist accommodation owners, with members of the public and those working in the tourism sector also well represented. All other stakeholder groups each accounted for less than 6% of responses, suggesting that the consultation primarily captured the views of accommodation providers and individuals with a direct interest in the tourism sector.

1.2 Type of Tourist Accommodation Owned

The accommodation owner respondent group was predominantly comprised of short-term letting operators, indicating that the findings are strongly informed by perspectives from this sector. Hotels formed the next largest accommodation category, while B&Bs, outdoor accommodation providers, and guesthouses were represented to a lesser extent. A small number of respondents operated hostels, while 'Other' responses related to alternative accommodation models, including hybrid accommodation offerings, luxury village-based accommodation and accommodation businesses linked to tourism activity providers.

1.3 Geographic Profile of Respondents

The consultation attracted participation from respondents across Ireland, with only a small number residing outside the country. Responses were received from all regions, demonstrating broad geographic coverage. Participants also represented a diverse range of settlement types, including rural areas, towns, cities, and coastal or island communities, indicating that the findings reflect perspectives from a diverse range of geographic settings.

1.4 Use of Accessible Accommodation

To provide context for the responses in Section 8, respondents were asked whether they, or anyone they regularly travel with, use accessible tourist accommodation. While most respondents indicated that neither they nor anyone they regularly travel with uses accessible tourist accommodation, over a quarter reported using accessible accommodation either occasionally or regularly.

Section 2: Current Experience of Tourist Accommodation

Responses highlighted strong support for tourism development that benefits local communities and promotes a more balanced spread of visitor activity across regions. Respondents viewed the quality, availability, affordability and range of tourist accommodation as important contributors to positive tourism outcomes, while also raising concerns about impacts on housing supply. Overall, the findings point to a preference for a balanced approach to tourism growth that supports visitor needs, local communities and wider sustainability objectives.

2.1 Please rank your priorities for the Tourist Accommodation Strategy in order of preference:

Respondents ranked six priorities for the Tourist Accommodation Strategy. The findings suggest that respondents place particular importance on ensuring that tourism development delivers benefits for local communities and supports a balanced regional distribution of tourism activity. While accommodation capacity, quality, governance and sustainability remain important considerations, they were generally ranked lower than community-focused and regionally balanced development objectives.

2.2 For each of the following accommodation factors, please indicate the extent to which you believe it has a positive, negative, or no impact on tourism outcomes in your area:

Respondents generally viewed the quality, availability, affordability, accessibility and variety of tourist accommodation as making a positive contribution to tourism outcomes in their area. The quality and standard of accommodation, the availability of accessible

accommodation, and the range of accommodation types were identified as particularly important positive factors.

Views were more mixed regarding seasonality and the environmental impact of tourist accommodation, with respondents expressing varying perspectives on their effects. The impact of tourist accommodation on housing emerged as the main area of concern, with more respondents perceiving it as having a negative rather than a positive effect.

Overall, the findings suggest broad support for the role of tourist accommodation in enhancing tourism outcomes, while highlighting the need to address housing-related challenges and wider sustainability considerations.

Section 3: Current Offering

Collectively, the findings suggest a desire for a broader and more flexible accommodation landscape capable of supporting regional tourism growth, addressing evolving visitor needs and strengthening the tourism offering.

Responses demonstrate strong support for a more diverse and geographically dispersed accommodation offering, with particular emphasis on outdoor accommodation, self-catering options and accommodation development in rural areas, small towns and emerging tourism destinations. Respondents also identified challenges in meeting the needs of certain market categories while highlighting opportunities for innovation through alternative accommodation formats, community-led models and nature-based tourism accommodation.

3.1 Looking ahead, which types of tourist accommodation do you think Ireland needs more of?

The findings suggest that respondents see the greatest need for growth in outdoor accommodation, self-catering accommodation and serviced accommodation, highlighting demand for a diverse mix of accommodation options rather than a singular focus on hotel development.

‘Other’ responses highlighted support for a wider range of accommodation formats and niche accommodation types. Respondents referred to accommodation options such as glamping, campsites, campervan facilities, bunkhouses, capsule accommodation, small apartments and cottages, as well as the reuse of heritage and farm buildings for tourism purposes. Several respondents also highlighted the role of short-term letting, home-sharing and room rental accommodation in providing additional capacity and accommodation options for families and groups. Some responses emphasised the need for greater support and consistency in planning and policy frameworks for outdoor accommodation. A small number of respondents also raised concerns regarding the use

of tourism accommodation for non-tourism purposes and its implications for tourism capacity.

3.2 In your view, where is additional tourist accommodation most needed?

Respondents identified the greatest need for additional tourist accommodation as being outside major urban centres, particularly in rural areas, small towns and emerging tourism destinations. This indicates support for regional tourism development and a more balanced geographic distribution of tourism activity.

‘Other’ responses generally reinforced the importance of regional and rural accommodation development, highlighting the need for additional accommodation in coastal locations, regional towns and areas associated with tourism infrastructure such as greenways. There were references to the need for greater provision of outdoor accommodation, including glamping and lodge-style accommodation, as well as planning and regulatory issues affecting accommodation development.

3.3 How well does tourist accommodation in your area meet the needs of business travellers and business-event visitors (e.g. those attending meetings, conferences, or corporate events, consider factors such as digital readiness, workspace availability, and meeting facilities)?

Responses suggest that respondents generally perceive tourist accommodation to provide a moderate level of support for business and business-event visitors. While a substantial proportion considered existing provision to be suitable for this market segment, a similar proportion identified limitations, indicating potential scope for improvements in areas such as digital infrastructure, workspace provision and meeting facilities.

3.4 How well does tourist accommodation in your area meet the needs of operational workers, such as haulage drivers, truckers, contractors, technicians, or other workers travelling for essential business operations, considering factors such as parking, affordability, location, and suitable facilities for irregular-hour stays?

The responses indicate that respondents perceive notable challenges in meeting the accommodation needs of operational workers. The relatively high proportion of negative responses may reflect issues relating to affordability, parking provision, location and facilities suitable for irregular working patterns.

3.5 Are there any emerging or innovative accommodation models that should be considered as part of future planning?

Free-text responses highlighted support for a more diverse range of accommodation options as part of future tourism planning. Responses were analysed using thematic analysis and coded into a series of thematic categories. Individual responses could be assigned to multiple themes where they referenced more than one topic; therefore,

frequencies represent the number of theme mentions rather than the number of respondents.

The most frequently mentioned themes were '*Outdoor and Nature-Based Accommodation*', including camping, glamping, caravan sites and eco-tourism offerings, and '*Alternative and Innovative Accommodation Models*', such as pods, modular units and boutique accommodation.

Respondents also identified the importance of '*Self-Catering and Short-Term Letting Accommodation*' and '*Community, Rural and Place-Based Models*', particularly in supporting rural communities, heritage tourism and local tourism development. Other themes included '*Planning, Regulation and Supporting Infrastructure*', '*Accommodation Capacity and Existing Stock*' and '*Workforce and Long-Term Accommodation*'.

Responses indicate strong support for a more diverse accommodation offering that extends beyond traditional hotel provision, and which includes outdoor, self-catering, community-led and innovative accommodation models. These options were seen as helping to support rural tourism growth, respond to changing visitor needs and strengthen links with local communities and natural assets. Respondents also emphasised the importance of planning, infrastructure, pricing and the effective use of existing accommodation stock.

Section 4: Accommodation Capacity and Future Demand

The responses indicate concerns about the adequacy of current tourist accommodation capacity and strong support for increasing accommodation provision. Respondents favoured new accommodation development, greater provision in regional and rural areas, and measures to support year-round demand. The responses also highlight the importance of balancing accommodation growth with planning, environmental, housing and community considerations. Key barriers to future capacity growth were identified as development and construction costs, planning timelines, infrastructure constraints and regulatory requirements.

4.1 How would you rate the current availability of tourist accommodation in your area?

Responses indicate mixed views on the availability of tourist accommodation. While many respondents considered current availability to be '*Acceptable*' or '*Adequate*', a substantial proportion viewed it as '*Inadequate*'. Relatively few respondents believed accommodation availability was '*Very Adequate*'.

4.2 Over the next 5 years, how do you expect demand for tourist accommodation in your area to change?

Respondents generally anticipated that demand for tourist accommodation in their area would either increase or remain stable over the next five years.

The findings imply that respondents are broadly optimistic about future demand for tourist accommodation, with most expecting either growth or stable demand over the next five years.

4.3 In developing this strategy, it may not be possible to maximise all objectives at the same time. Respondents were asked to identify their preferred priorities across a series of competing objectives relating to tourism accommodation.

Respondents showed strong support for sustainable and regionally balanced tourism accommodation development which promotes year-round demand, encourages provision in regional and rural areas, and supports new accommodation development. Views were more mixed on issues relating to planning and environmental safeguards, community wellbeing, housing availability and the role of short-term lets.

4.4 Which factors most affect the development of tourist accommodation in your area?

The results suggest that respondents view the development of tourist accommodation as being most constrained by the cost of development, planning processes and infrastructure availability, with regulatory and market-related factors also playing a significant role.

‘Other’ responses highlighted planning and regulatory constraints, land and site availability, housing availability for staff, and infrastructure and service provision as factors affecting accommodation development. Some respondents also raised concerns regarding the use of tourism accommodation for non-tourism purposes. Smaller numbers of respondents referred to community impacts, rural tourism development, and the viability of accommodation businesses in areas affected by seasonality and limited visitor demand.

Section 5: Regulation

The responses indicate that respondents hold mixed views on the effectiveness of the current regulatory framework for tourist accommodation in Ireland, with slightly more respondents expressing a negative than a positive view of its effectiveness. Across both the quantitative and qualitative findings, a consistent message emerged regarding the need for improvements to the regulation and registration of tourist accommodation, particularly in relation to short-term letting (STL) accommodation. Respondents identified governance and oversight, enforcement and compliance, and quality standards as key areas requiring further attention. Qualitative responses highlighted

concerns regarding regulatory burden, planning requirements and the potential impact of additional regulation on accommodation providers.

The findings suggest broad support for a regulatory framework that is clear, consistent, effectively enforced and capable of maintaining high standards across all accommodation types.

5.1 How would you rate the effectiveness of the regulatory framework for tourist accommodation in Ireland (Tourist Traffic Acts 1939-2016)?

Respondents expressed mixed views on the effectiveness of the regulatory framework for tourist accommodation in Ireland.

5.2.1 Which aspects of regulation, if any, do you believe may require further attention?

Respondents identified the *'Regulation/Registration'* of tourist accommodation as the area most in need of further attention. Other commonly highlighted issues included *'Governance and Oversight'*, *'Enforcement and Compliance'*, and the maintenance of *'Quality Standards'*. Some respondents also pointed to the need for greater *'Consistency across regions'*. While a minority felt there were *'No significant issues'*, the findings suggest broad interest in strengthening the regulatory framework and its implementation across the tourist accommodation sector.

5.2.2 Respondents were invited to provide any additional detail to support their selections:

The open-ended responses highlighted a range of views on the regulation of tourist accommodation. The most prominent theme related to the *'Regulation/Registration of Short-Term Lets'*, with respondents calling for stronger oversight, improved registration systems and a more level regulatory framework across accommodation types. Some respondents expressed concerns about the *'Planning and Regulatory Burden'* on accommodation providers.

Other key themes included the importance of maintaining quality standards, strengthening enforcement and compliance, and improving governance and oversight arrangements. Respondents also raised issues relating to housing impacts, infrastructure and sustainability, emerging accommodation types, regulatory modernisation, and regional consistency. Generally, there appears to be broad support for a clear, effective and well-enforced regulatory framework that maintains standards while supporting the sustainable development of the accommodation sector.

Section 6: Data Collection

Respondents expressed strong support for improving tourism data collection and recognised its value in informing tourism planning, investment decisions and understanding visitor behaviour. There was broad support for the development of a standardised national dataset and for collecting additional visitor information, provided participation remains voluntary and proportionate.

The findings also indicate a preference for digital, low-burden data collection methods that integrate with existing booking and check-in processes. Transparency, ease of participation and minimising administrative requirements were identified as important considerations. While support for enhanced data collection was generally high, accommodation providers highlighted practical concerns about implementation and the potential operational impacts of additional reporting requirements.

6.1 Do you think improved data on visitor movements would be useful for the following areas?

Across all areas examined, a substantial majority of respondents indicated that improved visitor movement data would be useful. The findings demonstrate strong support for the use of enhanced visitor movement data to inform tourism planning, policy development and destination management. Respondents appear to see significant value in such data for supporting regional tourism development, understanding visitor behaviour and informing investment decisions.

6.2 Do you support the introduction of a standardised national core dataset (limited to length of stay, number of guests, and place of residence)?

The findings suggest strong support for the collection of a consistent and limited set of visitor accommodation data at a national level. Given that the proposed dataset is restricted to a small number of core statistical variables, the relatively high level of support indicates broad recognition of the potential value of standardised data in informing tourism planning, policy development and decision-making.

6.3 Respondents were asked: If introduced, how should this core dataset be collected?

The responses indicate a preference for digital and low-burden approaches to data collection, with some concerns raised regarding the potential for increased administrative burdens. Respondents were most likely to favour methods that can be integrated into existing booking and check-in processes, rather than approaches requiring significant staff involvement or paper-based administration.

‘Other’ responses generally focused on the practicalities of data collection. Respondents highlighted the importance of ensuring that all accommodation types are included within

any data collection framework, noted the potential role of airports and ports in capturing visitor information, and referred to international examples of visitor registration systems.

The findings indicate support for collecting core visitor information in a manner that minimises disruption for both visitors and accommodation providers. The popularity of online and integrated approaches suggests that respondents favour efficient and streamlined data collection methods.

6.4 Which approach would you support?

Prior to answering this question, respondents were informed that, in addition to a standardised core dataset, further visitor profile information could potentially be collected, including reason for travel, mode of transport, visitor category and travel group type.

Respondents showed a clear preference for a balanced approach to tourism data collection, provided that it remains proportionate, practical and flexible. While there was broad support for collecting additional visitor profile information, most favoured doing so on a voluntary basis rather than making it mandatory. Support for limiting data collection to a core dataset alone was comparatively lower, indicating broad recognition of the value of enhanced visitor data for tourism planning and decision-making.

6.5 To what extent would you be willing to provide additional information on a voluntary basis?

The findings suggest a generally positive attitude towards the voluntary provision of additional visitor information. More than half of respondents expressed a willingness to participate, while only a relatively small minority indicated that they would be unwilling to do so.

This is consistent with earlier findings regarding the collection of additional visitor profile information, which showed a preference for a core dataset supplemented by voluntary information rather than a fully expanded mandatory dataset.

6.6 What additional visitor profile information would you feel comfortable providing on a voluntary basis?

The findings point to a relatively high level of comfort with providing a range of additional visitor profile information where participation is voluntary. Respondents appeared most willing to provide information relating to travel motivations and travel behaviour, while substantial majorities were also comfortable providing information relating to travel party composition and visitor category.

The relatively low proportion selecting ‘None of the above’ suggests limited resistance to providing additional data where the information requested remains proportionate and non-sensitive.

6.7 What factors would most influence your level of comfort in providing additional visitor information?

The responses imply that transparency and convenience are key factors in shaping respondents' willingness to provide additional information. The results show that respondents are generally more concerned with understanding why information is being collected and ensuring that the process is straightforward than with issues relating to data retention or data sharing.

This is consistent with earlier results, which demonstrated support for a proportionate and voluntary approach to data collection.

6.8 If additional visitor profile information were to be collected (e.g. reason for travel, age band, transport mode), how should it be collected?

The findings indicate a clear preference for digital and low-burden approaches to collecting additional visitor profile information. Respondents were most likely to favour methods that can be integrated into existing booking and check-in processes, thereby minimising administrative burden for both accommodation providers and visitors.

A small number of respondents who selected 'Other' raised concerns regarding the burden of data collection on accommodation providers, questioned the effectiveness of accommodation-level data collection in capturing visitor movements, and emphasised the importance of providing flexibility for guests in how information is supplied.

This aligns with earlier findings which indicate support for streamlined technology-enabled data collection methods rather than paper-based or staff-administered approaches.

6.9 When considering the collection and use of guest data, which should be prioritised?

Responses show that respondents generally recognise the value of visitor data for tourism planning and decision-making but favour an approach that is proportionate and balances this objective with the need to limit the amount of information collected from visitors. While almost one-third of respondents prioritised improved tourism planning, only a relatively small minority considered minimising data collection to be the sole priority.

6.10 Q to those who identified as tourist accommodation owners: How feasible would it be to integrate this type of data collection into existing check-in processes?

The findings suggest that accommodation owners have mixed views regarding the practicality of integrating additional data collection into existing check-in processes. While a substantial proportion considered integration to be somewhat feasible,

respondents were more likely to identify implementation challenges than to regard the process as straightforward.

6.11 Q to those who identified as tourist accommodation owners: If data were to be collected, which method would minimise operational burden?

The findings indicate a strong preference among accommodation owners for digital, self-service approaches to data collection that minimise staff involvement and administrative workload. In particular, the high level of support for pre-arrival online collection indicates a preference for gathering information before guests arrive on-site, thereby reducing the operational impact on accommodation providers.

‘Other’ responses highlighted concerns regarding the administrative burden of data collection and the potential for inconsistent application across different accommodation types. This is in line with earlier results relating to preferred data collection methods.

6.12 Which operational considerations would be most relevant in relation to the collection and use of visitor data?

The findings suggest that respondents are primarily concerned with the practical implications of visitor data collection for both visitors and accommodation providers. Respondents highlighted the importance of maintaining a positive guest experience while minimising any additional administrative burden. Data governance considerations and the consistent application of requirements across different accommodation types were also identified as important factors.

Responses submitted under ‘Other’ generally focused on the practicalities and value of data collection. Several respondents suggested that data should be gathered through government bodies or existing data sources rather than accommodation providers, while others questioned the need for additional data collection where similar information may already be available.

Section 7: Affordability and Availability

The responses show that affordability and availability challenges vary considerably across different visitor categories and are not experienced equally across the tourism market. While some groups, particularly business event travellers and international tourists, were generally perceived to have access to affordable and available accommodation, respondents identified more significant challenges for budget-conscious travellers, as well as for family travellers, event tourists and travellers with accessibility requirements.

Respondents also highlighted the importance of increasing the diversity of accommodation options, expanding supply and encouraging travel outside peak periods

as potential means of improving both affordability and availability. Although large events were viewed as influencing accommodation prices in some areas, respondents were more likely to consider these effects occasional rather than widespread.

By contrast, seasonality emerged as a significant and persistent challenge, with most respondents indicating that it continues to affect accommodation demand and availability. Taken together, the findings point to the need for a balanced approach that addresses both capacity constraints and affordability pressures while supporting a more diverse, accessible and year-round accommodation offering.

7.1 How would you assess the affordability of tourist accommodation for the following visitor segments?

Respondents perceived notable differences in accommodation affordability across visitor groups. Business event travellers and international tourists were generally seen as having better access to affordable accommodation, while budget-conscious travellers were viewed as facing the greatest affordability challenges, followed by family travellers and event tourists. Overall, accommodation was most commonly considered somewhat affordable across visitor categories, suggesting that while options are generally available, costs may still present difficulties for many travellers.

7.2 How would you assess the availability of tourist accommodation for the following visitor segments?

Respondents perceived clear differences in accommodation availability across visitor groups. International tourists, business event travellers and domestic tourists were generally seen as having good access to accommodation, while budget-conscious travellers were viewed as facing the greatest availability challenges, followed by travellers with accessibility requirements and event tourists. Overall, while accommodation was commonly considered somewhat available, it may not always be available in sufficient quantity or in the form, location, or timing needed to meet demand.

7.3 What measures could most improve availability and affordability of tourist accommodation?

Respondents highlighted the importance of both increasing accommodation supply and managing demand to address affordability and availability challenges. There was strong support for expanding and diversifying accommodation options, increasing capacity, and encouraging travel outside peak periods to reduce pressure on demand.

Additional suggestions focused on reducing the costs of providing accommodation, addressing pricing concerns (reduced business costs and lower VAT rates), strengthening regulation and quality standards, improving transport infrastructure, supporting traditional accommodation models such as B&Bs, and better managing tourism demand. Some respondents also raised concerns about the use of tourist

accommodation for non-tourism purposes, reflecting a view that a combination of cost-related measures and broader policy interventions is needed to improve accommodation availability and affordability.

7.4 How often do large events (sports events, festivals, conferences) influence accommodation prices in your area?

Respondents reported mixed views on the extent to which large events influence accommodation prices in their area. The responses suggest that, while large events are perceived to affect accommodation prices in some areas, particularly during periods of high demand, respondents were more likely overall to view such impacts as infrequent rather than commonplace.

7.5 How significant is seasonality for tourist accommodation in your area?

Respondents generally considered seasonality to be a significant issue for tourist accommodation in their area. The findings suggest that seasonality is a widespread challenge for tourist accommodation providers and destinations, affecting demand patterns for much of the year.

Section 8: Accessibility

Respondents recognise the importance of accessible accommodation and generally considered it to be a significant component of the overall tourism offering. However, many respondents felt that current provision is insufficient, particularly in rural areas, small towns and peak tourism destinations.

Respondents with direct experience of accessibility requirements provided mixed assessments of existing accessible accommodation, although most indicated that improvements in accessibility would influence their choice of destination within Ireland. Accommodation owners identified financial costs, planning requirements and building constraints as the principal barriers to expanding accessible accommodation provision.

The findings also highlight support for a balanced approach to improving accessibility, combining enhanced accommodation provision with practical implementation measures, financial supports and investment in broader accessibility infrastructure. Respondents emphasised the importance of ensuring that accessibility policies are proportionate, recognise the challenges faced by existing accommodation providers and reflect the diverse needs of visitors with accessibility requirements.

8.1 How important is the availability of accessible tourist accommodation in the overall tourist accommodation offering?

Respondents generally recognised the importance of accessible tourist accommodation within the overall accommodation offering. The results indicate broad support for

ensuring that accommodation provision can cater for visitors with diverse accessibility requirements, although views differed regarding the degree of importance that should be attached to this issue.

8.2 In your view, how adequate is the current supply of accessible tourist accommodation in Ireland?

These findings suggest that respondents generally perceive shortcomings in the current supply of accessible tourist accommodation. While almost one-third considered existing provision to be adequate, respondents were more likely overall to identify deficiencies, indicating a need for greater availability of accommodation that caters to visitors with accessibility requirements.

However, when considered alongside the findings in 8.1, the results point to a gap between the importance attached to accessible accommodation and perceptions of current supply.

8.3 Where, if anywhere, do you believe the greatest need for additional accessible tourist accommodation is most evident?

The results indicate that respondents perceive the greatest need for additional accessible tourist accommodation outside major urban centres, particularly in rural areas and small towns. This indicates a view that accessibility gaps may be most evident in locations where accommodation provision is more limited or where accessible options are less widely available.

8.4 In your experience, how well does existing accessible accommodation meet user needs?

This question was asked only of respondents who indicated that they, or someone they regularly travel with, regularly or occasionally use accessible tourist accommodation.

These findings suggest a mixed assessment of existing accessible accommodation among respondents with direct experience of accessibility requirements. While respondents were somewhat more likely to provide a positive than a negative assessment, the relatively high proportion reporting that accommodation meets user needs ‘Not Well’ indicates that challenges remain in ensuring that accessible accommodation consistently meets the needs of all users.

8.5 Would improved accessible accommodation influence your choice of destination within Ireland?

This question was asked only of respondents who indicated that they, or someone they regularly travel with, regularly or occasionally use accessible tourist accommodation.

The findings suggest that accessibility considerations can play an important role in destination selection for visitors with accessibility requirements and those travelling with

people who have such needs. They also indicate that increasing the availability and quality of accessible accommodation has the potential not only to improve visitor experiences but also to influence travel patterns within Ireland by enabling a wider range of destinations to be considered.

8.6 Q for tourist accommodation owners: What are the main factors that may affect the provision or expansion of accessible tourist accommodation?

The findings suggest that accommodation owners perceive the expansion of accessible tourist accommodation to be constrained primarily by financial, regulatory and physical building considerations, rather than by a lack of demand. The prominence of cost-related barriers in particular highlights the potential importance of supports, incentives or guidance measures in facilitating future investment in accessible accommodation.

8.7 When balancing different objectives, which should be given greater priority in the Strategy?

The findings suggest that respondents recognise the importance of both expanding accommodation provision and ensuring that accommodation is accessible to a broad range of visitors. However, when trade-offs arise between these objectives, respondents were marginally more likely to favour accessibility and inclusion.

The close split in responses highlights the importance of pursuing a balanced approach that seeks to increase accommodation capacity while embedding accessibility and inclusivity considerations within future accommodation development.

8.8 Are there any other considerations that should be taken into account when developing policy to support accessible tourist accommodation?

Free-text responses highlighted several considerations that respondents believe should inform future policy development relating to accessible tourist accommodation.

Respondents emphasised the importance of improving accessibility in tourism accommodation through a balanced approach and that policy measures should accompany proportionate regulation, financial support, practical guidance and accessibility infrastructure investment. Key themes included the need for proportionate accessibility requirements, greater flexibility for older and heritage buildings, clearer understanding of different accessibility needs, and better information for visitors.

Participants also highlighted challenges relating to accommodation capacity, the cost of retrofitting existing properties, and the need for grants and incentives to support accessibility improvements. Overall, there was strong support for enhancing accessibility, with respondents stressing that changes should be achievable for accommodation providers while effectively meeting the needs of travellers with accessibility requirements.

Section 9: Environmental Standards and Sustainability

Respondents expressed strong support for environmental sustainability standards in the tourist accommodation sector, particularly measures that improve resource efficiency and reduce environmental impacts, such as water and waste management, energy efficiency, and retrofitting existing accommodation. The responses emphasised that sustainability initiatives should be practical, supported by funding and incentives, and tailored to different accommodation types, while also recognising the importance of broader social, economic and community sustainability considerations, including accessibility.

9.1 How important are environmental and sustainability standards or practices in tourist accommodation?

Respondents generally considered environmental and sustainability standards or practices in tourist accommodation to be important.

9.2 Which sustainability measures do you consider most important for tourist accommodation?

The results indicate that respondents place greatest importance on practical measures that improve resource efficiency and reduce environmental impacts, particularly water and waste management, energy efficiency, and the upgrading of existing accommodation stock.

'Other' responses primarily focused on implementation considerations rather than proposing entirely new sustainability measures. Respondents highlighted the need for funding and incentives to support retrofitting and other improvements, the challenges of applying certain measures to heritage properties, and the importance of considering social and economic sustainability alongside environmental sustainability. Smaller numbers of respondents referenced housing impacts, over-tourism, EV charging infrastructure, public transport accessibility, environmental reporting requirements, recycling, and the provision of green spaces.

Section 10: Short-Term Lettings

Respondents reported moderate to high levels of short-term letting in their areas and highlighted both benefits and drawbacks. The main benefits related to tourism and economic activity, including increased visitor spending, support for local businesses, and greater accommodation choice and capacity. Concerns about reduced housing availability and affordability were the most commonly cited negative impacts. While many respondents viewed short-term letting as a useful addition to existing tourism accommodation, others saw it as competing with traditional providers.

Generally, respondents recognised its value for tourism but emphasised the need to balance these benefits with housing and community needs.

10.1 How would you describe the scale of short-term letting activity in your area?

Respondents generally perceived short-term letting activity in their areas as moderate to high, while fewer respondents reported low levels. The findings suggest that short-term letting is a significant presence in most areas represented by the survey.

10.2 What, if any, positive impacts does short-term letting accommodation have in your area? (Select all that apply)

Respondents most commonly associated short-term letting accommodation with benefits for tourism and the local economy. Key positive impacts included supporting local businesses and hospitality providers, increasing visitor spending, expanding accommodation choice, and helping to accommodate higher visitor numbers. Some respondents also highlighted the reuse of vacant properties, support for festivals and events, economic opportunities in rural areas, accommodation for larger groups, and enhanced visitor engagement with local communities.

‘Other’ responses reflected mixed views. While many respondents recognised the contribution of short-term letting to tourism and local economic activity, others raised concerns about its perceived effect on housing availability, local communities, and competition with other accommodation providers.

10.3 What, if any, negative impacts does short-term letting accommodation have in your area? (Select all that apply)

The responses indicate that concerns regarding housing supply and affordability were the most commonly perceived negative impacts of short-term letting accommodation. At the same time, a notable proportion of respondents indicated that they did not perceive any significant challenges associated with short-term letting in their area.

‘Other’ responses reflected a range of views on the impacts of short-term letting accommodation. Several respondents reinforced concerns relating to housing availability, community cohesion and neighbourhood character, citing difficulties for local residents and workers in accessing accommodation and concerns regarding the displacement of long-term residents. Respondents also highlighted issues relating to security in multi-unit developments, pressure on wastewater and other infrastructure, and the uneven distribution of tourism activity.

Some respondents expressed the view that short-term letting accommodation does not have significant negative impacts in their area, particularly where accommodation is provided through home-sharing or the use of properties that are unsuitable for long-term residential use. Several respondents also argued that short-term letting should not be

conflated with wider housing shortages and emphasised the benefits it can bring to tourism and local economies.

10.4 How does the presence of short-term letting affect other types of tourist accommodation in your area?

Findings show that respondents were more likely to view short-term letting as complementing rather than competing with existing accommodation supply. However, a substantial proportion considered the relationship to be competitive or dependent on local circumstances, suggesting that the impact of short-term letting varies across different tourism markets.

Section 11: Regional Balance & Rural Tourism

Respondents emphasised the need for infrastructure investment, destination development and financial supports to drive tourism growth beyond major urban centres. Rural areas, small towns and coastal and island destinations were most often identified as priorities for additional accommodation development. The findings also highlight the importance of transport links, accommodation capacity, event facilities and digital connectivity in enhancing the appeal of rural areas for tourism and business events.

11.1 Which measures would best support tourist accommodation in rural and regional areas?

Respondents identified infrastructure investment, destination development and targeted financial supports as the key measures needed to support tourist accommodation in rural and regional areas. Marketing and destination development were also widely viewed as important for attracting visitors and strengthening local tourism offerings. Some respondents additionally highlighted challenges related to planning, development costs and financial risk, as well as the need to enhance attractions, cultural amenities and year-round services.

11.2 Where is additional tourist accommodation most needed?

The findings indicate somewhat stronger support for increasing accommodation provision in rural areas and smaller settlements. However, responses were distributed across all location types, suggesting that respondents perceive a need for additional tourist accommodation in a variety of destinations rather than within any single geographic area.

11.3 In your view, which factors would most improve the ability of rural regions to attract business events (e.g., meetings, corporate retreats, training events)? (Select all that apply)

Respondents identified transport connectivity as the most important factor in improving the ability of rural regions to attract business events. Adequate year-round accommodation capacity, event-ready venues and reliable broadband connectivity were also seen as key requirements. In addition, some respondents highlighted the importance of enhancing the overall visitor experience through local attractions, activities and destination amenities, while others pointed to planning and development constraints.

Section 12: Additional Comments and Thematic Analysis

A total of 139 respondents provided additional comments, which were grouped into several recurring themes. The most frequently discussed topics were short-term letting accommodation, rural and regional tourism development, planning and regulation, sustainability, housing, and tourism product development.

Respondents highlighted the close links between tourism accommodation, planning, regional development, housing, infrastructure and community wellbeing. Short-term letting was the most prominent issue, attracting both support for its tourism benefits and concerns about its impact on housing.

Respondents emphasised the need to expand accommodation capacity, support rural tourism, improve infrastructure and connectivity, maintain a diverse accommodation offering, and ensure that future tourism growth is balanced with community and environmental considerations. The themes identified are discussed in more detail below.

12.1.1 Short-term Letting Accommodation

‘Short-term letting accommodation’ was the most frequently discussed issue, with respondents expressing a range of views on its role in Ireland's tourism sector. Many highlighted its contribution to tourism capacity, visitor choice, local economies and regional development, particularly in rural and coastal areas where accommodation options may be limited. Respondents also noted its role in supporting tourism businesses and sustaining rural and heritage properties.

At the same time, concerns were raised about the impact of short-term lets on housing availability, community sustainability and the long-term viability of destinations. Many respondents called for stronger regulation, registration requirements and enforcement measures, particularly in areas experiencing housing pressures. A common theme was support for improved registration and data collection.

While views differed regarding the appropriate level of regulation, several respondents supported the introduction of a registration system for short-term lets, highlighting that any future regulatory approach should be proportionate, evidence-based and responsive to local circumstances.

12.1.2 Rural and Regional Tourism Development

‘Rural and regional tourism development’ emerged as a key theme, with respondents highlighting the importance of tourism to local economies and communities. Many emphasised the need to promote lesser-visited destinations, support visitor dispersal, and ensure sufficient accommodation capacity outside major tourism centres.

Seasonality was identified as a significant challenge, with respondents suggesting that enhanced marketing, year-round tourism initiatives, and investment in all-weather attractions could help sustain demand throughout the year. Respondents also stressed the role of accommodation providers and tourism businesses in supporting employment, local businesses and economic activity in rural areas.

Respondents highlighted the need for targeted investment and supports, including funding for accommodation development, transport improvements, event infrastructure, tax incentives and assistance for local tourism enterprises, to strengthen tourism growth in regional destinations.

12.1.3 Planning, Regulation and Policy

‘Planning, regulation and policy’ was referenced frequently, in particular with regard to planning permissions, regulatory requirements, change-of-use requirements, and the governance of tourism accommodation development. Some respondents highlighted concerns regarding delays, uncertainty, and inconsistencies in planning processes.

Short-term letting featured prominently in this theme. While opinions varied on the level of regulation needed, many supported the introduction of registration systems and improved data collection, with a preference for keeping registration requirements separate from planning requirements and applying them proportionately, especially for existing operators.

Respondents also expressed concerns about administrative burdens, regulatory complexity, and compliance costs for tourism businesses. At the same time, some stressed the importance of maintaining appropriate standards, oversight, and enforcement.

Several submissions called for stronger coordination among public bodies, better strategic planning, and a more coherent policy framework to support sustainable tourism accommodation development.

12.1.4 Sustainability, Communities and Housing

‘Sustainability, community wellbeing’ emerged as a significant theme. Many respondents stressed that tourism development should benefit local communities and achieve a balance between tourism growth, housing availability, and residents' quality of life.

Housing availability was a recurring concern, particularly in tourism-dependent areas, with issues including limited long-term rental supply, staff accommodation challenges, and affordability. Respondents noted the impact that housing shortages can have on tourism businesses, including difficulties recruiting and retaining workers.

There was also strong support for preserving local communities, culture, and environmental assets through sustainable tourism development. Respondents highlighted the importance of environmental protection, eco-tourism opportunities, and ensuring tourism growth aligns with the long-term needs of residents and communities.

While housing impacts were widely discussed, views differed on the role of tourism accommodation on wider housing pressures. Some favoured stronger regulation in areas with housing shortages, while others viewed housing and tourism accommodation as complementary goals that can coexist.

12.1.5 Tourism Product and Destination Development

Respondents highlighted the importance of strengthening Ireland's tourism offering through investment in attractions, events, outdoor recreation, and business tourism infrastructure. They highlighted the importance of supporting year-round tourism, regional development, visitor dispersal, and the promotion of Ireland's cultural and heritage assets. Improved visitor facilities, family attractions, and destination infrastructure were also seen as key to sustainable tourism growth.

12.1.6 Accommodation Types and Diversity

Respondents emphasised the importance of maintaining a diverse range of accommodation options to meet different visitor needs and budgets. Self-catering accommodation and traditional B&Bs were particularly valued for offering choice and authentic experiences, while alternative options such as glamping, motorhome tourism, farm stays, boutique accommodation, and family-friendly facilities were highlighted as growing opportunities that reflect changing visitor preferences. Family-friendly accommodation and accommodation with cooking facilities were also highlighted as important.

12.1.7 Financial Supports, Investment and Infrastructure

Respondents referred to the need for grants, tax incentives, targeted funding programmes and support for accommodation upgrades, particularly in rural, coastal and island destinations. Several comments highlighted the challenges faced by tourism businesses due to taxation, labour costs, construction costs, operating expenses and seasonal fluctuations in demand.

Respondents also referred to difficulties accessing finance for accommodation development, refurbishment and expansion projects. Several submissions called for greater transparency and efficiency in the allocation of public funding and emphasised

the importance of directing investment towards projects that strengthen tourism capacity, support regional development and improve long-term sector sustainability.

12.1.8 Other Themes Raised by Respondents

Several additional themes emerged from the responses, including *‘Accommodation Capacity and Supply’*, *‘Infrastructure and Connectivity’*, *‘Accommodation Affordability and Pricing’*, and the use of *‘Non-Tourism Use of Tourist Accommodation’*.

Respondents highlighted accommodation shortages in some destinations and emphasised the need for additional tourism accommodation capacity, as well as better utilisation of existing accommodation assets, including seasonal accommodation, student accommodation and vacant buildings. The importance of transport and supporting infrastructure was also frequently noted, with comments referring to public transport, regional connectivity, roads, broadband and visitor facilities as important enablers of tourism growth and visitor dispersal.

Accommodation affordability was another concern raised by respondents, with several comments highlighting rising accommodation costs, value for money concerns and the affordability of domestic tourism. Respondents suggested that a wider range of accommodation options could improve affordability and accessibility for visitors.

Finally, a number of respondents raised concerns regarding the use of tourism accommodation for non-tourism purposes, highlighting the perceived impact on accommodation availability, particularly in rural and coastal areas, and the potential implications for tourism businesses and local economies.

Section 13: Written Submissions

The summary below seeks to reflect the range of issues and perspectives raised in three written submissions. They should not be interpreted as representing the views of all consultation respondents or stakeholders. They are grouped into six broad themes:

Accommodation Capacity, Supply and Future Demand

Submissions highlighted concerns about whether tourism accommodation supply can keep pace with future demand. Factors identified as barriers to expanding capacity include high construction and development costs, project viability challenges, planning processes, access to finance, and infrastructure constraints, particularly in regional areas.

Stakeholders emphasised the need for maintaining a diverse accommodation offering, including hotels, guesthouses, self-catering units, outdoor accommodation, and short-term lets, which play an important role in supporting visitor numbers, especially in rural, coastal, and seasonal destinations.

The seasonal nature of tourism was also noted, with a need to ensure accommodation is available year-round to support growth beyond peak periods. Some key issues identified include the gap between projected tourism demand and future accommodation supply, the concentration of new developments in a limited number of locations, and difficulties in progressing approved accommodation projects to completion.

Regional and Tourism Development

Submissions emphasised the importance of tourism accommodation in encouraging visitor dispersal, overnight stays, and tourism growth outside major urban centres. Accommodation was identified as a key driver of regional economic development, benefiting local businesses and tourism in rural and emerging destinations.

Stakeholders noted significant regional variations in accommodation availability and highlighted the importance of aligning accommodation supply with regional tourism goals and visitor demand. A mix of accommodation types, including hotels, guesthouses, self-catering units, and short-term lets, was recognised as important for supporting regional tourism.

The submissions referred to the role of digital platforms in supporting visitor dispersal and helping smaller accommodation providers and emerging destinations attract domestic and international visitors. Emphasis was placed on supporting accommodation development, transport and digital connectivity, year-round tourism, and investment in regional and rural areas.

Investment, Development and Planning

Submissions identified planning timelines, regulatory processes, infrastructure constraints and labour availability as key barriers to tourism accommodation development, increasing project costs, risks, and delays. Concerns were raised about the viability of new accommodation developments, particularly in regional areas. This included the relationship between development costs and potential returns, the concentration of new development in larger urban centres and the limited project delivery in some regional locations despite strong tourism demand.

Stakeholders emphasised the need for a supportive investment environment, including increased regional investment, refurbishment and redevelopment of existing accommodation, improved tourism infrastructure, and planning processes that facilitate the delivery of new tourism accommodation.

Regulation, Standards and Competitiveness

Submissions highlighted the importance of accommodation classification systems, quality assurance frameworks and registration systems in maintaining standards, consumer confidence and Ireland's reputation as a high-quality tourism destination. They noted the importance of continued investment, innovation and product

improvement, alongside clear registration systems, consistent regulatory approaches and proportionate regulation in relation to short-term letting accommodation.

Overall, submissions highlighted the importance of maintaining a regulatory framework that supports consumer confidence, accommodation quality and the long-term competitiveness of Ireland's tourism sector.

Sustainability, Accessibility and Data

Submissions referred to measures aimed at improving sustainability within the accommodation sector, including energy efficiency, retrofitting existing accommodation, water and waste reduction measures, sustainable tourism practices and greater transparency regarding sustainability credentials. Contributors highlighted the importance of sustainable tourism practices to support balanced, year-round tourism growth.

Accessibility and data-driven planning were identified as key priorities. Submissions noted the value in improving the visibility of accessibility features, providing clear information for travellers and targeted support for accommodation providers. In addition, submissions noted the importance of high-quality data, including the collection of standardised tourism datasets, digital reporting systems and the use of aggregated data to support evidence-based planning, policymaking and sector development.

Economic Contribution of Tourism Accommodation

Accommodation was identified as a critical enabler of domestic and international tourism, supporting overnight stays, higher-spending visitors, business and group travel, and year-round tourism activity. Submissions highlighted its significant economic contribution through visitor spending, employment, local supply chains and investment, particularly in regional and rural areas, while also supporting broader policy goals such as regional growth and off-peak tourism.

Submissions referred to the role of accommodation within the wider tourism ecosystem, supporting attractions, events, transport services, local businesses and community activities. They also highlighted the importance of maintaining a diverse and affordable accommodation offering to enhance consumer choice, support sector competitiveness, and ensure tourism remains accessible to a wide range of visitors.

Next Steps:

The Department of Enterprise, Tourism and Employment would like to sincerely thank everyone who took the time to participate in this public consultation and share their views. Your responses provide valuable insights that will help shape the development of the Tourist Accommodation Strategy.

As work on the development of the strategy progresses, further targeted engagement and consultation with interested parties will be undertaken to explore specific issues in greater detail.