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Turasóireachta agus Fostaíochta
Department of Enterprise,
Tourism and Employment

Summary of Responses to the Public Consultation on the Development of a Tourist Accommodation Strategy

October 2026

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Survey Responses:

The following sections present the findings from the public consultation carried out through the online survey hosted on the EU Survey Platform. The results are organised according to the order of the survey questions and are presented under the relevant thematic headings.

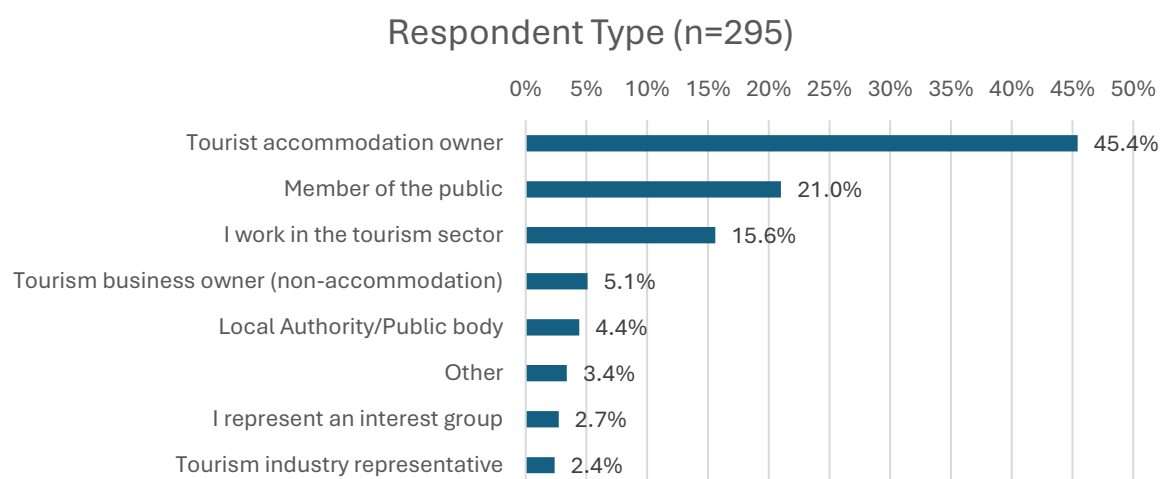
Section 1: Profile of Respondents

This section provides an overview of the respondent profile, outlining the types of stakeholders who participated in the consultation and the geographic distribution of responses, based on the information returned in the “About You” section of the survey.

1.1 Respondent Type

‘Tourist accommodation owners’ (45.4%) represented the largest respondent group. ‘Members of the public’ accounted for 21% of respondents, while 15.6% indicated that they ‘Work in the tourism sector’. All other respondent categories accounted for less than 6% of responses individually, including ‘Tourism business owners’ (5.1%), representatives of ‘Local Authorities or public bodies’ (4.4%), ‘Interest groups’ (2.7%) and ‘Tourism industry representatives’ (2.4%).

The small number of respondents selecting ‘Other’ included representatives of community development, environmental, and heritage organisations, researchers, retailers, and individuals with previous experience in the accommodation sector.

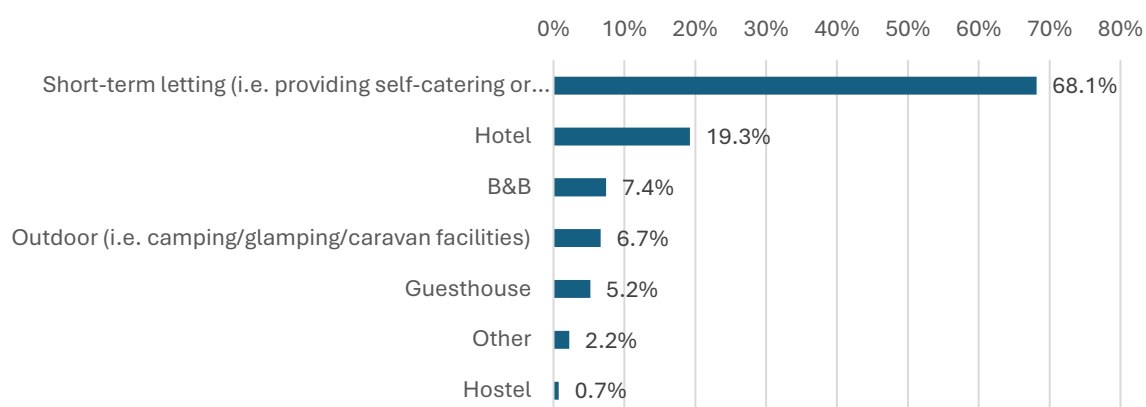


1.2 Those identifying as ‘Tourist accommodation owners’ were invited to indicate the type(s) of accommodation they operate.

‘Short-term letting’ operators accounted for 68.1% of accommodation owners. ‘Hotels’ were selected by 19.3% of respondents, followed by ‘B&Bs’ (7.4%), ‘Outdoor’ accommodation providers such as camping, glamping and caravan facilities (6.7%), and

'Guesthouses' (5.2%). A small number of respondents identified as *'Hostel'* operators (0.7%) or selected *'Other'* (2.2%).

Type of Tourist Accommodation Operated (n=135)



Note: As respondents could select multiple accommodation types, percentages do not total 100%.

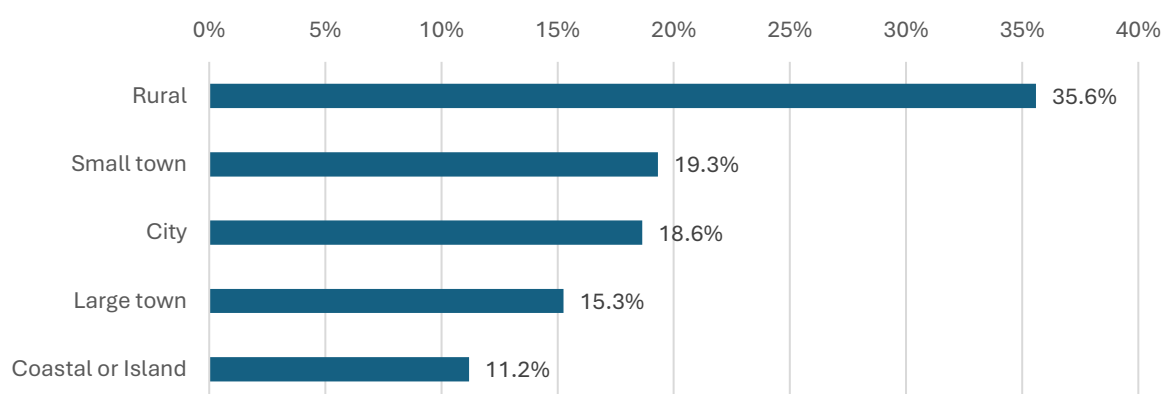
1.3 Geographic Profile of Respondents

96.3% of respondents were resident in Ireland, with 3.7% residing outside Ireland.

The largest numbers of respondents were from Dublin (14.9%), Cork (10.5%), Galway (8.8%), Kerry (8.5%), and Donegal (6.1%). Smaller numbers of responses were received from counties across all regions of the country, demonstrating broad geographic participation.

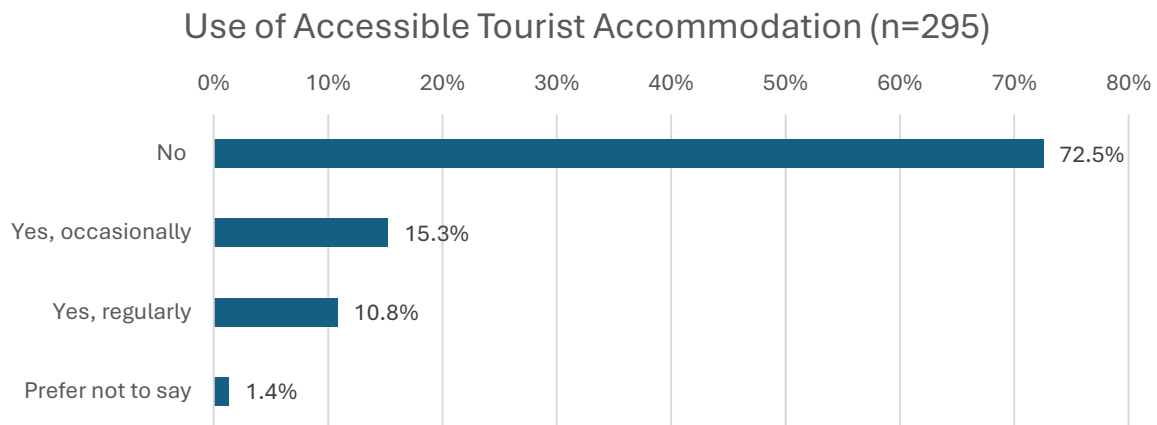
'Rural' areas accounted for the largest proportion of respondents (35.6%), followed by *'Small towns'* (19.3%), *'Cities'* (18.6%), *'Large towns'* (15.3%) and *'Coastal or Island locations'* (11.2%).

Settlement Type (n=295)



1.4 Respondents were asked about the use of Accessible Tourist Accommodation (context for responses in Section 8)

72.5% indicated that neither they nor someone they regularly travel with uses accessible accommodation, with slightly more than one-quarter (26.1%) reporting some level of use. This included 15.3% who use accessible accommodation occasionally and 10.8% who use it regularly.



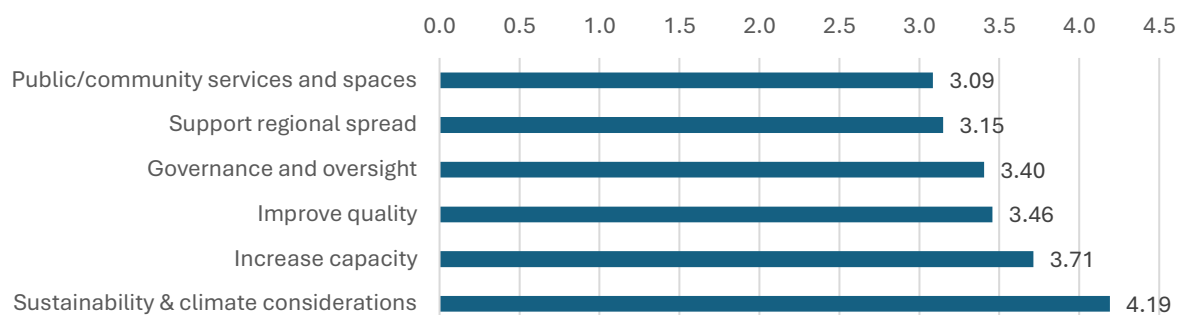
Section 2: Current Experience of Tourist Accommodation

This section explores how respondents perceive the contribution of tourist accommodation to tourism outcomes in their area, as well as the priorities they consider most important for the future development of the sector.

2.1 Please rank your priorities (6) for the Tourist Accommodation Strategy in order of preference:

Based on scores, 'Improving Public or community services and spaces' emerged as the highest-ranked priority (average rank: 3.09), closely followed by 'Supporting regional spread' (3.15). 'Governance and oversight of tourist accommodation' ranked third (3.40), followed by 'Improving quality' (3.46), 'Increasing capacity' (3.71) and 'Sustainability and climate considerations' (4.19).

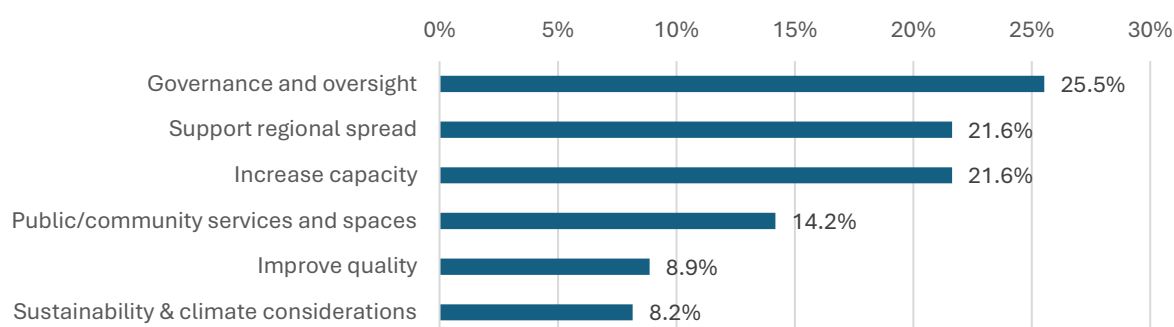
Average Ranking of Strategic Priorities for the Tourist Accommodation Strategy (n=282)



Note: Priorities were ranked from 1 (highest priority) to 6 (lowest priority). Lower average ranking scores indicate higher overall priority.

While average ranking scores provide an indication of respondents' overall priorities across all six areas, the following chart shows respondents' first-preference rankings only. 'Governance and oversight of tourist accommodation' was the most frequently selected first preference (25.5%), followed by 'Supporting regional spread' (21.6%) and 'Increase capacity' (21.6%).

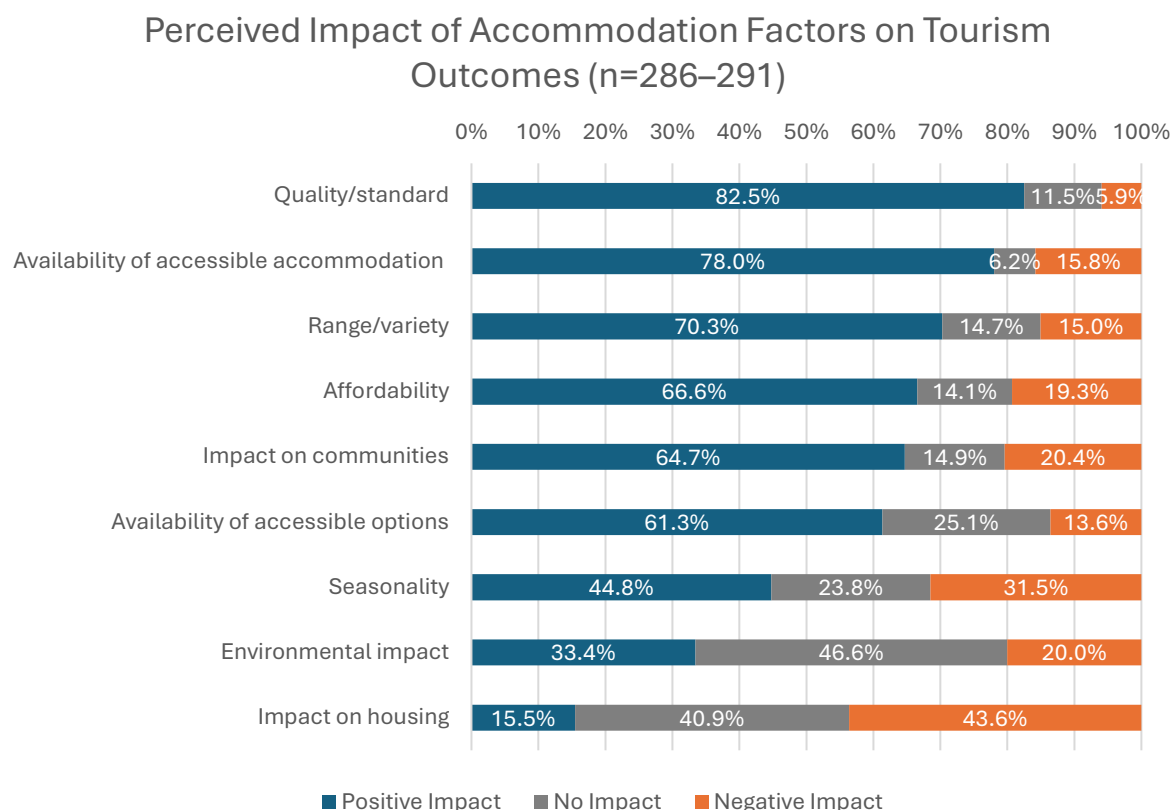
First Preference of Strategic Priorities for the Tourist Accommodation Strategy (n=282)



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:

The strongest positive impacts were associated with the 'Quality and standard of tourist accommodation' (82.5%), the 'Availability of accessible accommodation' (78%), and the 'Range/variety of accommodation types' (70.3%). Accommodation 'Affordability', 'Accessibility' and 'Impacts on communities' were also more frequently viewed as having a positive than a negative effect on tourism outcomes.

‘Environmental impact of tourist accommodation’ generated the highest proportion of *‘No Impact’* responses (46.6%), suggesting greater uncertainty or variation in perceptions of its effect on tourism outcomes. A total of 43.6% of respondents identified a negative impact, compared with 15.5% identifying a positive impact.



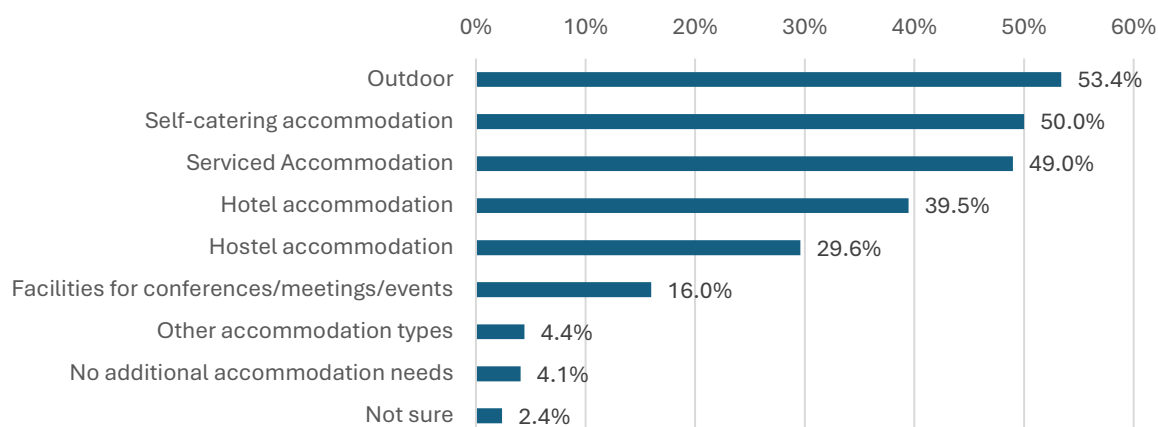
Section 3: Current Offering

This section explores respondents' views on the current and future provision of tourist accommodation in Ireland, including the types of accommodation required, the locations where additional capacity is most needed, and the extent to which existing accommodation meets the needs of different visitor groups.

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

‘Outdoor accommodation’ (e.g. camping, glamping and caravan facilities) was the most frequently identified accommodation need, selected by 53.4% of respondents, followed by *‘Self-catering accommodation’* (50%) and *‘Serviced accommodation’* such as guesthouses and B&Bs (49%). Demand for additional *‘Hotel accommodation’* (39.5%) and *‘Hostel accommodation’* (29.6%) was also noted, while 16% identified a need for more accommodation with conference, meeting and event facilities. Only small proportions selected *‘Other accommodation types’* (4.4%), indicated *‘No additional accommodation needs’* (4.1%), or were *‘Not sure’* (2.4%).

Types of Tourist Accommodation Ireland Needs More Of (n=294)

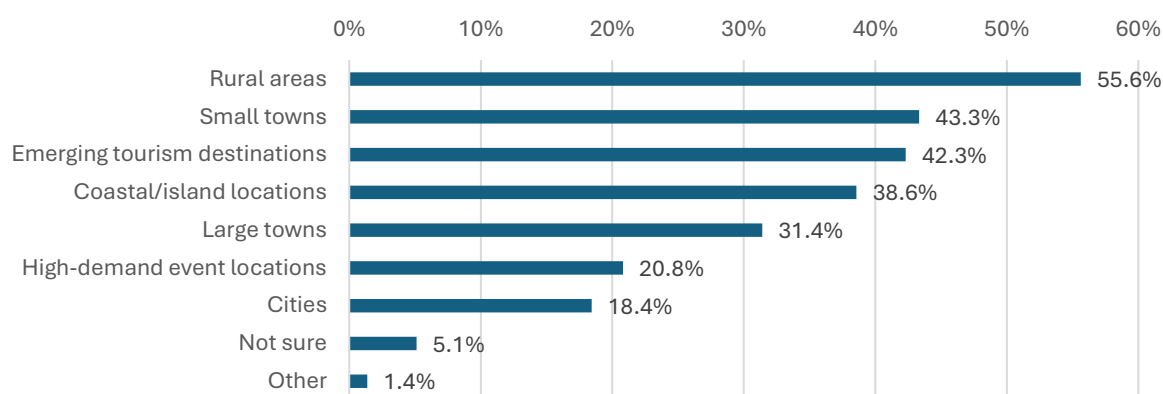


Note: As respondents could select multiple options, percentages do not total 100%.

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

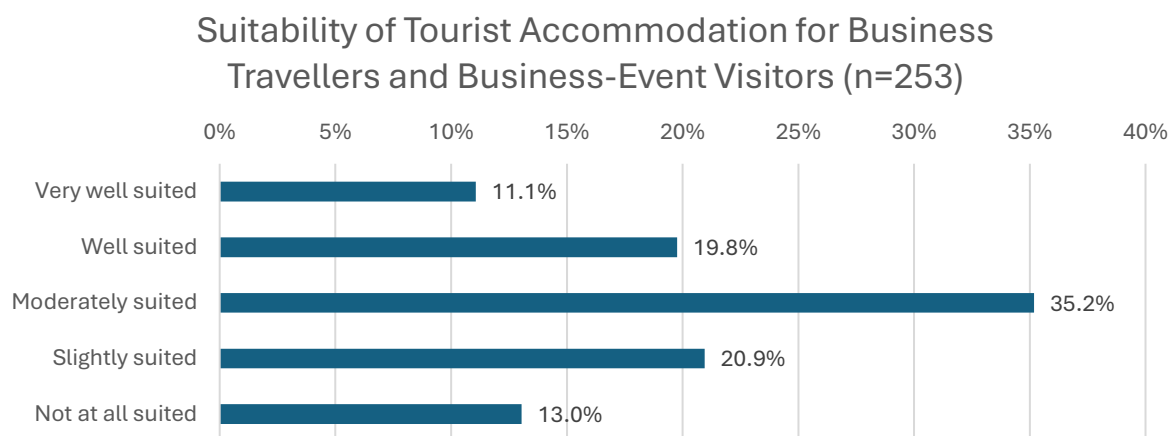
The most frequently selected location was ‘*Rural*’ areas (55.6%), followed by ‘*Small towns*’ (43.3%) and ‘*Emerging tourism destinations*’ (42.3%). A substantial proportion of respondents also identified a need for additional accommodation in ‘*Coastal and island locations*’ (38.6%) and ‘*Large towns*’ (31.4%). Smaller proportions identified ‘*High-demand event locations*’ (20.8%) and ‘*Cities*’ (18.4%) as priority locations for additional accommodation provision. Only a small number of respondents selected ‘*Not sure*’ (5.1%) or identified ‘*Other*’ locations (1.4%).

Locations Where Additional Tourist Accommodation Is Most Needed (n=293)



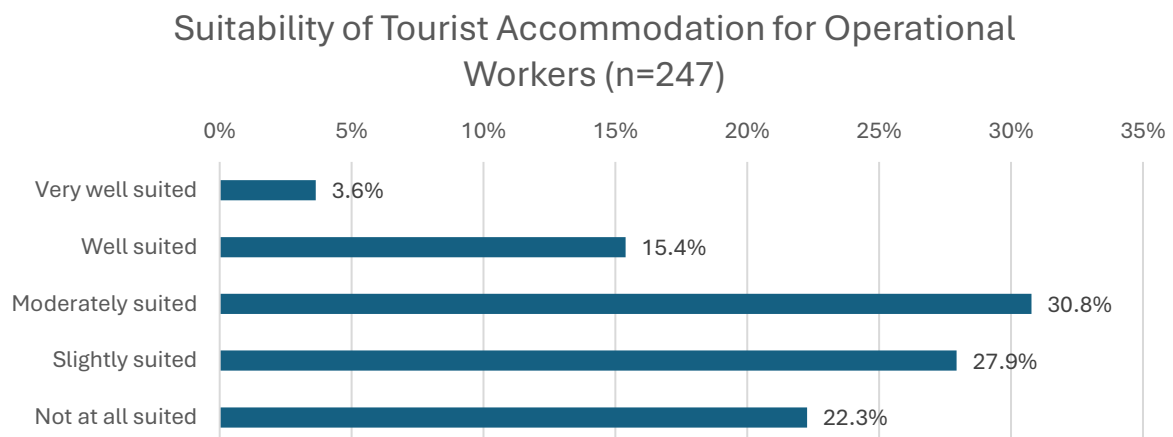
3.3 How well does tourist accommodation in your area meet the needs of business travellers and business-event visitors (e.g. those attending meetings, conferences, or corporate events, consider factors such as digital readiness, workspace availability, and meeting facilities)?

The most common response was *'Moderately suited'* (35.2%), followed by *'Slightly suited'* (20.9%) and *'Well suited'* (19.8%). A further 11.1% of respondents considered local accommodation to be *'Very well suited'*, while 13% indicated that it was *'Not at all suited'* to the needs of business and business-event visitors.



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 most common response was *'Moderately suited'* (30.8%), followed by *'Slightly suited'* (27.9%) and *'Not at all suited'* (22.3%). Smaller proportions of respondents considered accommodation to be *'Well suited'* (15.4%) or *'Very well suited'* (3.6%) to the needs of operational workers.



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

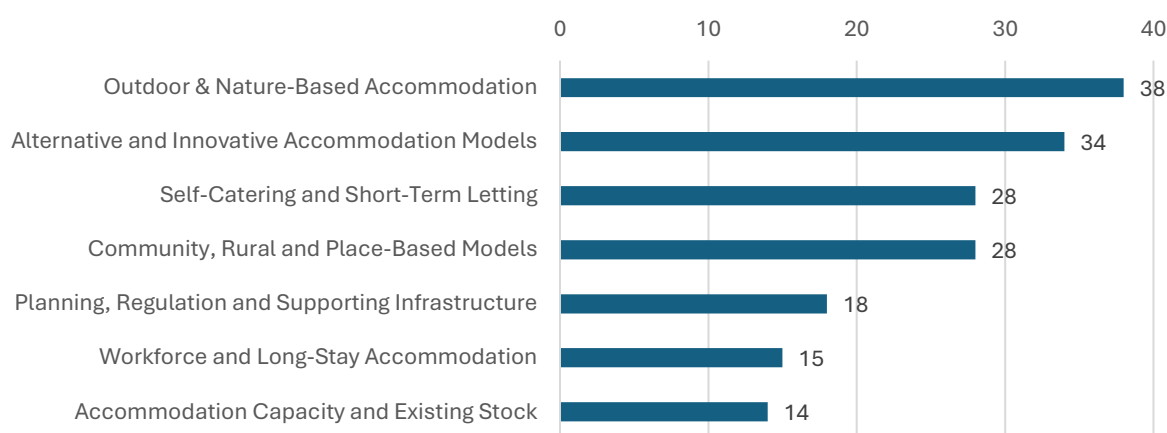
The most frequently referenced theme related to *‘Outdoor and Nature-Based Accommodation’* (38 mentions).

A second prominent theme was *‘Alternative and Innovative Accommodation Models’* (34 mentions), including pods, modular accommodation, hybrid accommodation formats, boutique accommodation, and branded accommodation concepts.

Respondents also frequently referred to *‘Self-Catering and Short-Term Letting Accommodation’* (28 mentions) and *‘Community, Rural and Place-Based Models’* (28 mentions).

Further themes related to *‘Workforce and Long-Term Accommodation’* (15 mentions)¹, the importance of *‘Planning, Regulation and Supporting Infrastructure’* (18 mentions) and *‘Accommodation Capacity and Existing Stock’* (14 mentions).

Key Themes Emerging from Responses on Future Accommodation Models (n=125)



Note: Figures represent the number of times a theme was referenced in coded responses. As individual responses could be assigned to multiple themes, totals exceed the number of respondents.

¹ While some responses referred to workforce and long-term accommodation for workers and contractors it should be noted that these issues are related to the commercial rental sector and as such fall outside the scope of the Tourist Accommodation Strategy, which will focus solely on tourist accommodation.

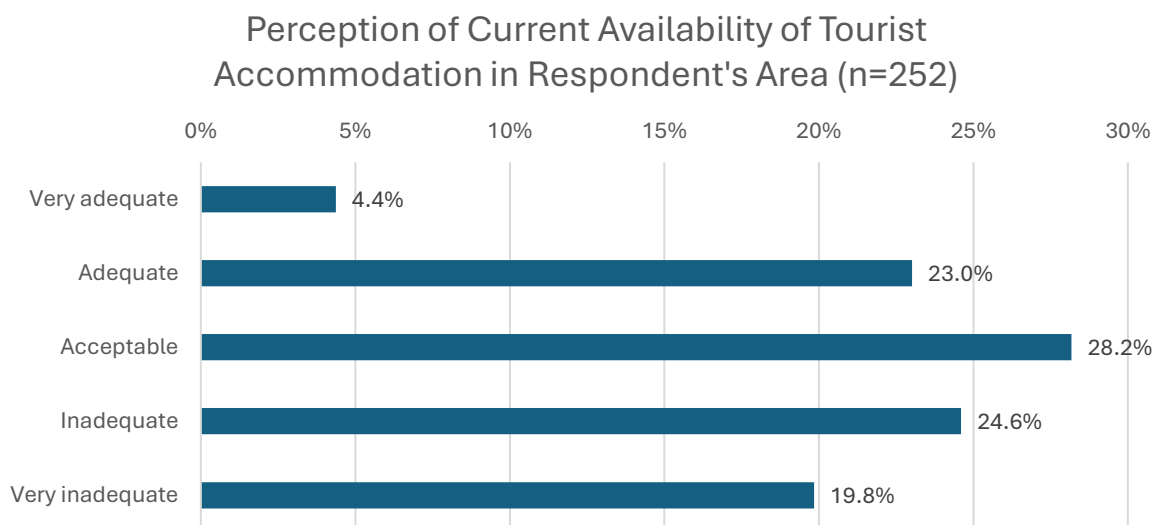
Theme	Example Sub-Themes	Mentions
Outdoor & Nature-Based Accommodation	Glamping, Camping, Caravan/Campervan, Eco/Farm, Retreats	38
Alternative and Innovative Accommodation Models	Pods, Modular, Hybrid, Boutique, Branded, Houseboats	34
Self-Catering and Short-Term Letting	Self-catering, Short-Term Letting, B&Bs, Lodges	28
Community, Rural and Place-Based Models	Community-Led Accommodation, Rural Tourism, Experiential/Heritage, Gaeltacht	28
Planning, Regulation and Supporting Infrastructure	Regulation, Infrastructure, Pricing	18
Workforce and Long-Stay Accommodation	Worker Accommodation, Long-term Accommodation, Corporate	15
Accommodation Capacity and Existing Stock	Repurposing, Non-tourism use of tourist accommodation, Hotels	14

Section 4: Accommodation Capacity and Future Demand

This section explores respondents' views on the adequacy of current tourist accommodation capacity, future accommodation demand, and the factors that may influence the development of additional tourist accommodation in Ireland.

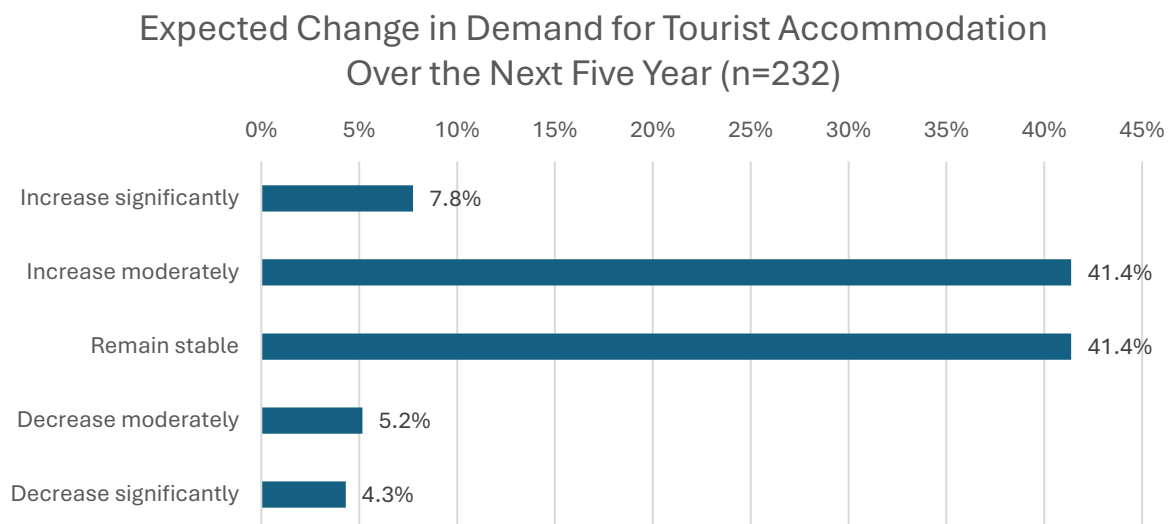
4.1 How would you rate the current availability of tourist accommodation in your area?

The most common response was 'Acceptable' (28.2%), followed by 'Inadequate' (24.6%) and 'Adequate' (23%). A further 19.8% of respondents rated availability as 'Very inadequate', while only 4.4% considered availability to be 'Very adequate.'



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

The most common responses were '*Increase moderately*' (41.4%) and '*Remain stable*' (41.4%), with both options receiving an equal proportion of responses. A further 7.8% of respondents expected demand to '*Increase significantly*.' In total, 49.1% anticipated an increase in demand, compared with 9.5% who expected demand to decrease ('*Decrease moderately*' or '*Decrease significantly*').

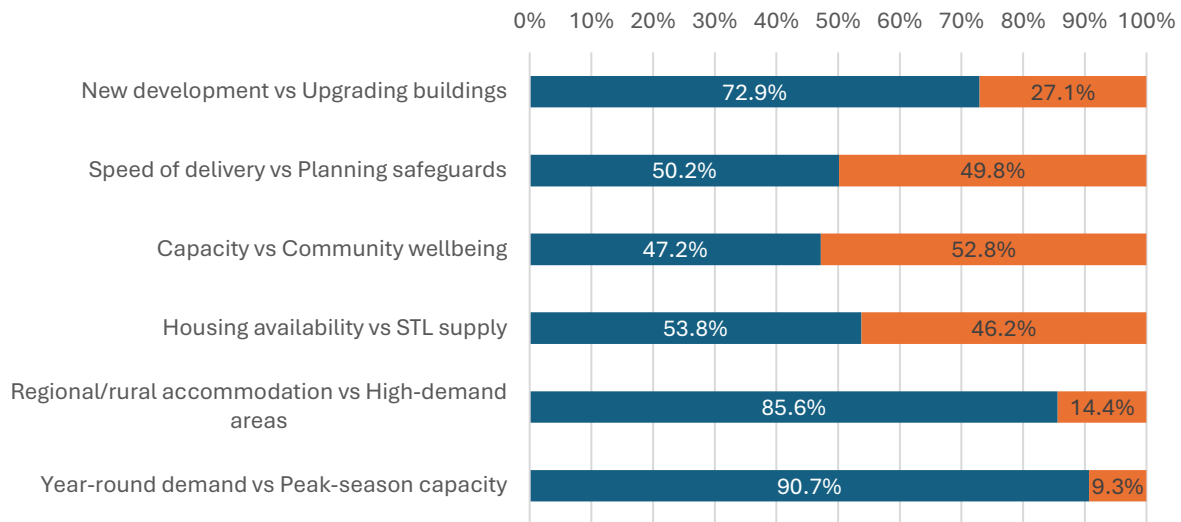


4.3 In developing this strategy, it may not be possible to maximise all objectives at the same time. Respondents were asked to identify their preferred priorities across a series of competing objectives relating to tourism accommodation.

The strongest preferences were for '*Supporting year-round, sustainable demand*' rather than '*Maximising peak-season capacity*' (90.7% versus 9.3%) and '*Encouraging regional and rural tourist accommodation*' rather than '*Concentrating accommodation in high-demand areas*' (85.6% versus 14.4%). Respondents also demonstrated a clear preference for '*New accommodation development*' over '*Upgrading existing buildings*' (72.9% versus 27.1%).

By contrast, views were much more evenly divided on questions relating to planning and environmental safeguards, community wellbeing, and housing availability and short-term letting supply, with no option attracting a substantial majority. The closest split was observed between '*Speed of delivery of accommodation*' (50.2%) and '*Strong planning and environment safeguards*' (49.8%).

Priority Choices Where Competing Objectives Arise

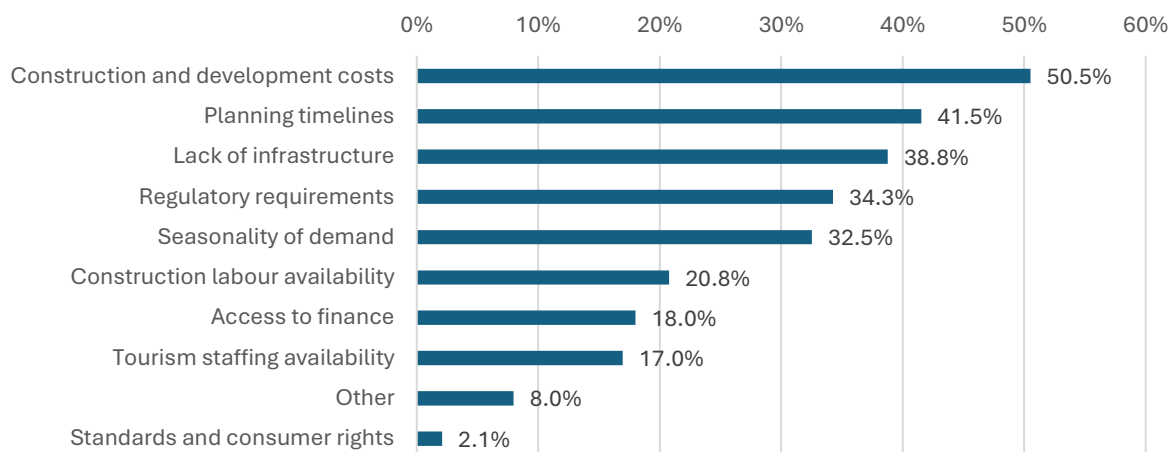


Note: Respondents were asked to select one preferred priority. Respondent numbers varied slightly across questions (n=286–292).

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

‘Construction and development costs’ (50.5%) was cited most, followed by ‘Planning timelines’ (41.5%) and ‘Lack of infrastructure’ (38.8%). Approximately one-third of respondents identified ‘Regulatory requirements’ (34.3%) and ‘Seasonality of demand’ (32.5%) as key constraints on accommodation development. Smaller numbers highlighted ‘Construction labour availability’ (20.8%), ‘Access to finance’ (18%) and ‘Tourism staffing availability’ (17%). Few respondents identified ‘Other factors’ (8%) or ‘Standards and consumer rights’ (2.1%) as significant influences.

Factors Affecting the Development of Tourist Accommodation (n=289)



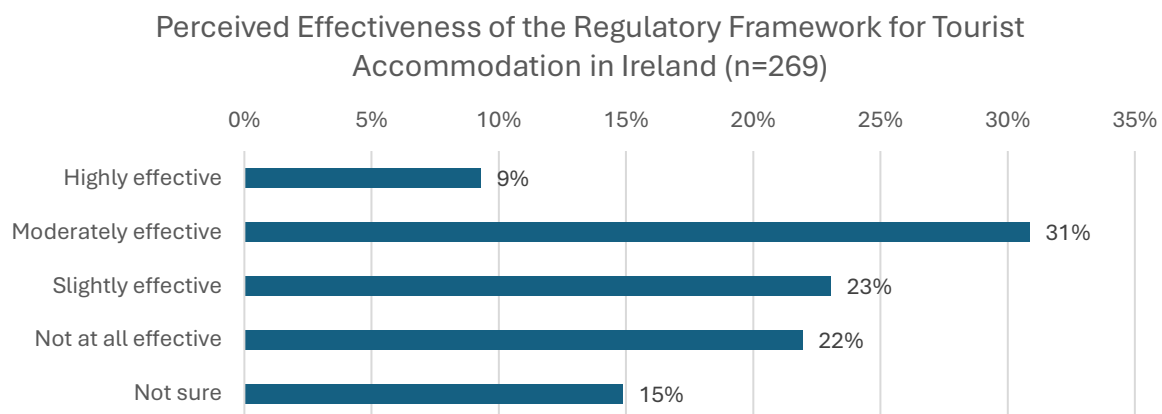
Note: As respondents could select multiple options, percentages do not total 100%.

Section 5: Regulation

This section explored respondents' views on the effectiveness of the current regulatory framework for tourist accommodation in Ireland, including the adequacy of existing registration, oversight, enforcement, and quality assurance arrangements.

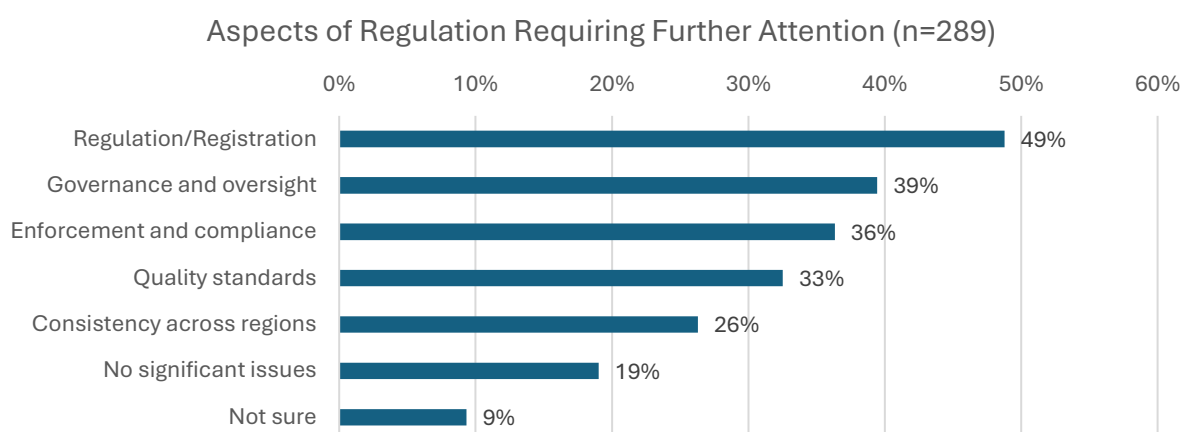
5.1 How would you rate the effectiveness of the regulatory framework for tourist accommodation in Ireland (Tourist Traffic Acts 1939-2016)?

The most common response was that the framework is '*Moderately effective*' (30.9%). However, 23% of respondents considered the framework to be '*Slightly effective*', with 21.9% considering it '*Not at all effective*'. A further 14.9% of respondents indicated that they were '*Not sure*.'



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

The most frequently selected area was '*Regulation/Registration of tourist accommodation*' (49%), followed by '*Governance and oversight of tourist accommodation*' (39%) and '*Enforcement and compliance*' (36%). Around one-third of respondents identified '*Quality standards*' (33%), while '*Consistency across regions*' (26%) was selected by just over one-quarter of respondents. 19% indicated that there were '*No significant issues*', while 9% were '*Not sure*'.



Note: As respondents could select up to three options, percentages do not total 100%.

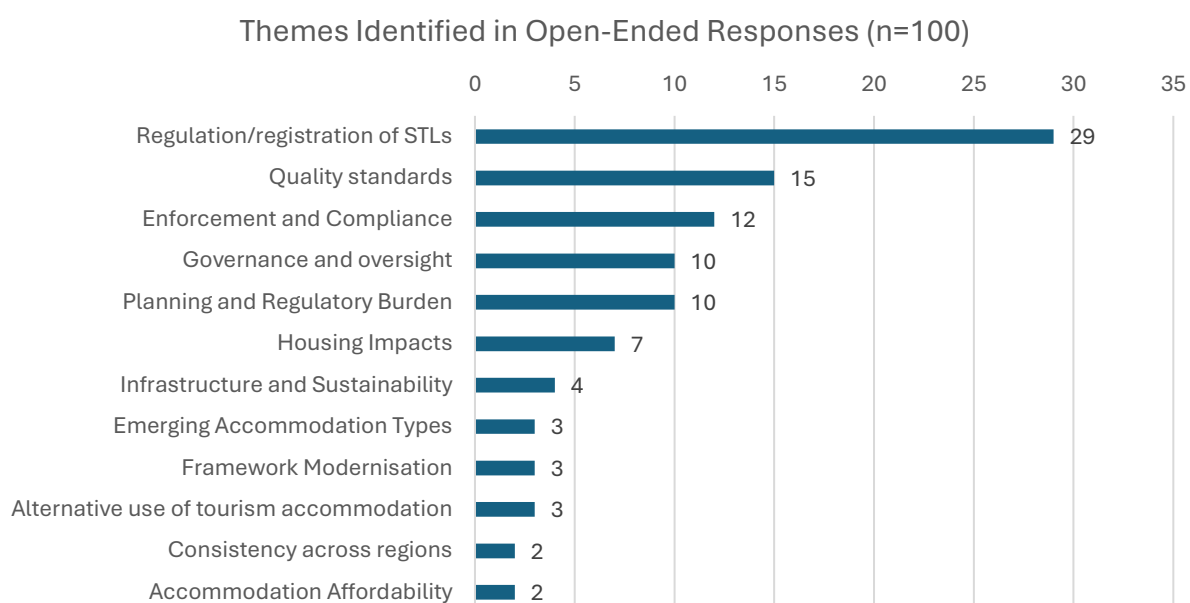
5.2.2 Respondents were invited to provide any additional detail to support their selections:

Analysis of the open-ended responses identified 12 themes across 100 coded theme mentions.

‘Regulation/Registration of Short-Term Lets’ (STLs) was the most frequently occurring theme (29 mentions). *‘Quality Standards’* (15 mentions) and *‘Enforcement and Compliance’* (12 mentions) were also prominent themes.

Respondents also commented on *‘Governance and Oversight’* (10 mentions), particularly in relation to the operation of the regulatory framework, and *‘Planning and Regulatory Burden’* (10 mentions), including planning requirements and the impact of regulation on accommodation providers.

Other themes included *‘Housing Impacts’* (7 mentions), *‘Infrastructure and Sustainability’* (4 mentions), *‘Emerging Accommodation Types’* (3 mentions), *‘Framework Modernisation’* (3 mentions), *‘Alternative Use of Tourism Accommodation’* (3 mentions), *‘Consistency Across Regions’* (2 mentions) and *‘Accommodation Affordability’* (2 mentions).



Note: As comments could be assigned to more than one theme, theme frequencies represent the number of theme mentions rather than the number of individual respondents.

Section 6: Data Collection

This section explores respondents' views on the collection and use of tourism data to support tourism planning, policy development, and destination management.

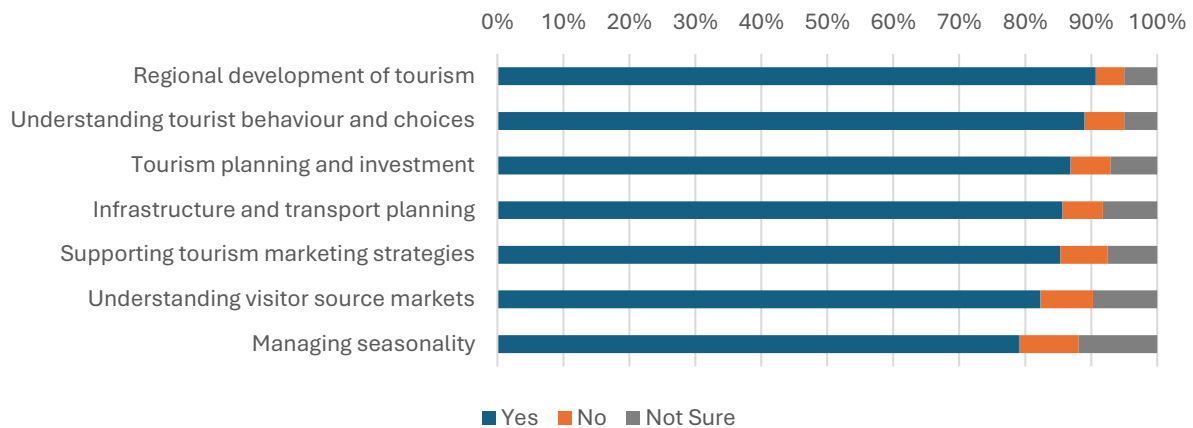
6.1 Do you think improved data on visitor movements would be useful for the following areas?

The strongest support was for '*Regional Development of Tourism*' (90.7%), followed closely by '*Understanding Tourist Behaviour and Choices*' (89%) and '*Tourism Planning and Investment*' (86.9%). Strong majorities also identified value in improved data for '*Infrastructure and Transport Planning*' (85.7%), '*Supporting Tourism Marketing Strategies*' (85.3%) and '*Understanding Visitor Source Markets*' (82.3%).

'*Managing Seasonality*' (79.1%) received the lowest level of agreement among the areas examined. Nevertheless, almost four in five respondents still considered improved visitor movement data to be useful for this purpose.

Across all areas, relatively small proportions of respondents indicated that improved visitor movement data would not be useful, with negative responses ranging from 4.3% to 9%.

Perceived Usefulness of Improved Visitor Movement Data (n=277-282)

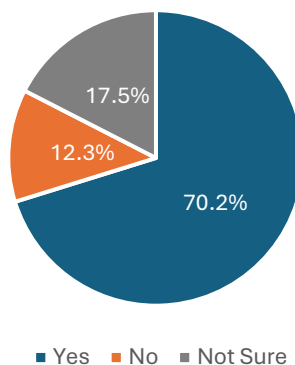


6.2 Do you support the introduction of a standardised national core dataset (limited to length of stay, number of guests, and place of residence)?

The proposed dataset would be limited to a small number of data points, including the number of guests, length of stay, and the county or country of residence of visitors.

A substantial majority of respondents (70.2%) indicated that they support the introduction of a standardised national core dataset. By comparison, 12.3% stated that they do not support its introduction, while 17.5% indicated that they were not sure.

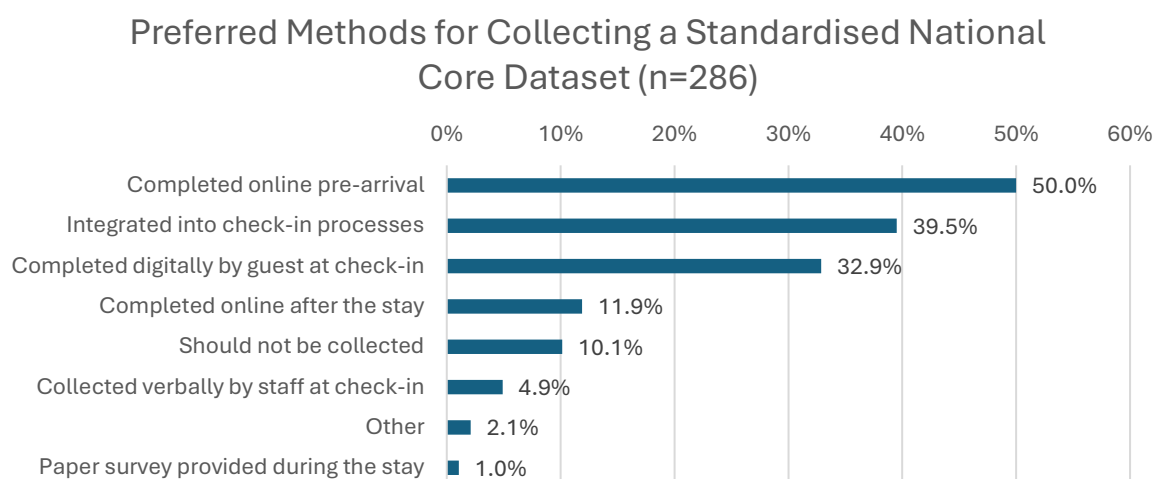
Support for the Introduction of a Standardised National Core Dataset (n=292)



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

The most frequently selected option was 'Completed online pre-arrival' (e.g., via a booking system or online form) at 50%, followed by 'Integrated into existing check-in processes' (39.5%) and 'Completed digitally by the guest at check-in' (32.9%).

Much smaller proportions supported data *‘Completed online after the stay’* (11.9%), while 10.1% of respondents indicated that the dataset *‘Should not be collected.’* Relatively few respondents favoured *‘Collected verbally by staff at check-in’* (4.9%), *‘Other’* methods (2.1%) or *‘Paper survey provided during the stay’* (1%).



Note: As respondents could select multiple options, percentages do not total 100%.

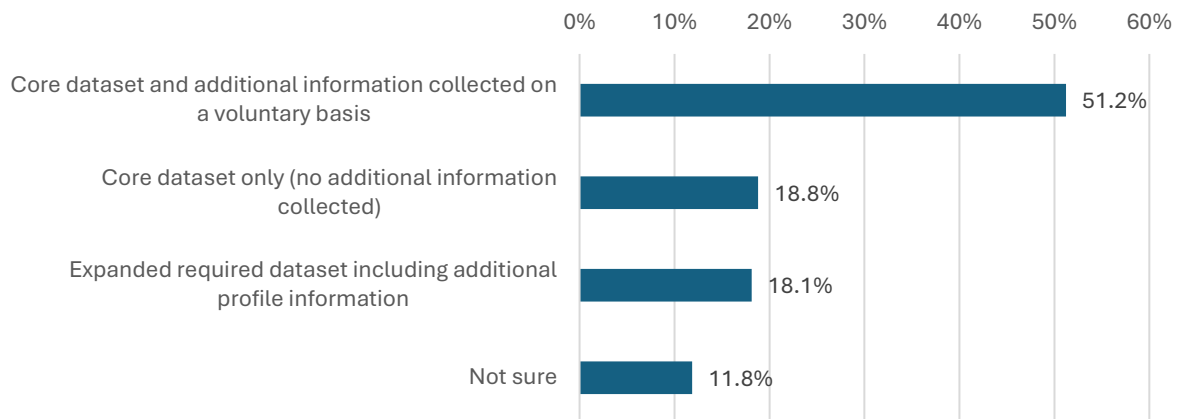
6.4 Which approach would you support?

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.

The most frequently selected option was collecting a *‘Core dataset with additional information collected on a voluntary basis’* (51.2%). This was substantially higher than support for either a *‘Core dataset only’* (18.8%) or an *‘Expanded required dataset including additional profile information’* (18.1%). A further 11.8% of respondents indicated that they were *‘Not sure.’*

While only 18.8% supported limiting collection to the core dataset alone, 69.3% supported collecting additional visitor profile information in some form (51.2% voluntary; 18.1% mandatory).

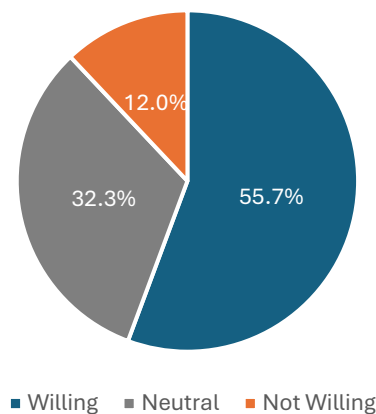
Preferred Approach to Collecting Additional Visitor Profile Information (n=287)



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

A majority of respondents (55.7%) indicated that they would be willing to provide such information, while 32.3% expressed a neutral view. A smaller proportion (12%) indicated that they would be not willing to provide additional information.

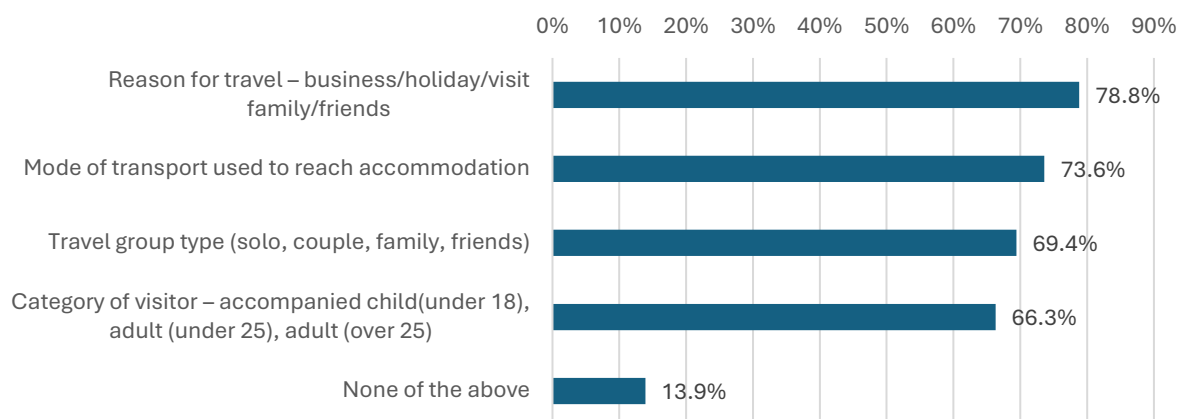
Willingness to Provide Additional Visitor Information on a Voluntary Basis (n=291)



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

The most frequently selected option was '*Reason for travel -business, holiday, visit family/friends*' (78.8%), followed by '*Mode of transport used to reach accommodation*' (73.6%), '*Travel group type*' (69.4%), and '*Category of visitor*' (66.3%). Only 13.9% of respondents indicated that they would not be comfortable providing any of the additional information listed.

Types of Additional Visitor Information Respondents Would Be Comfortable Providing (n=288)



Note: As respondents could select multiple options, percentages do not total 100%.

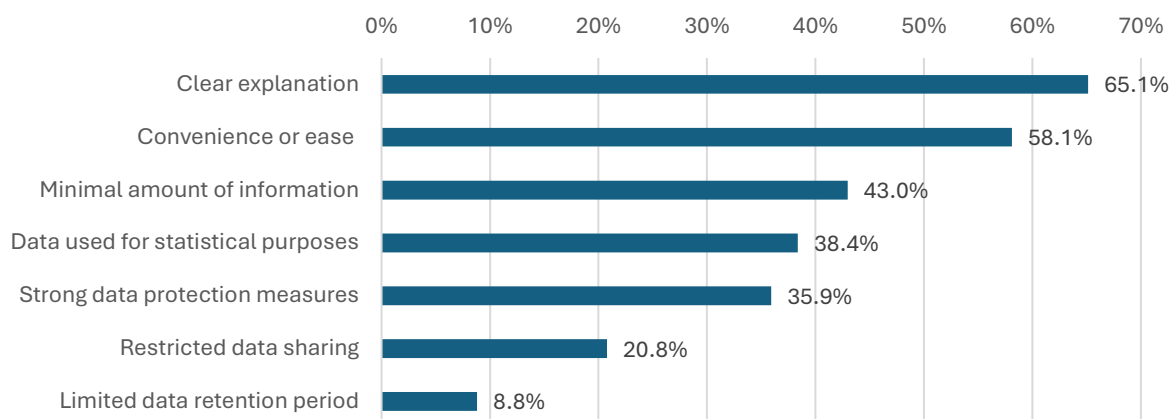
6.7 What factors would most influence your level of comfort in providing additional visitor information?

The most frequently selected factor was a *‘Clear explanation’* of why the data is being collected (65.1%), followed by the *‘Convenience or ease’* of providing the information (58.1%).

A substantial proportion of respondents also identified a *‘Minimal amount of information’* being required (43%), while 38.4% highlighted the importance of *‘Data used for statistical purposes’*. Concerns relating to data protection and security measures (35.9%) were also frequently cited.

Smaller proportions of respondents identified *‘Restricted data sharing’* (20.8%) and a *‘Limited data retention period’* (8.8%) as important factors influencing their level of comfort.

Factors Influencing Comfort with Providing Additional Visitor Information (n=284)



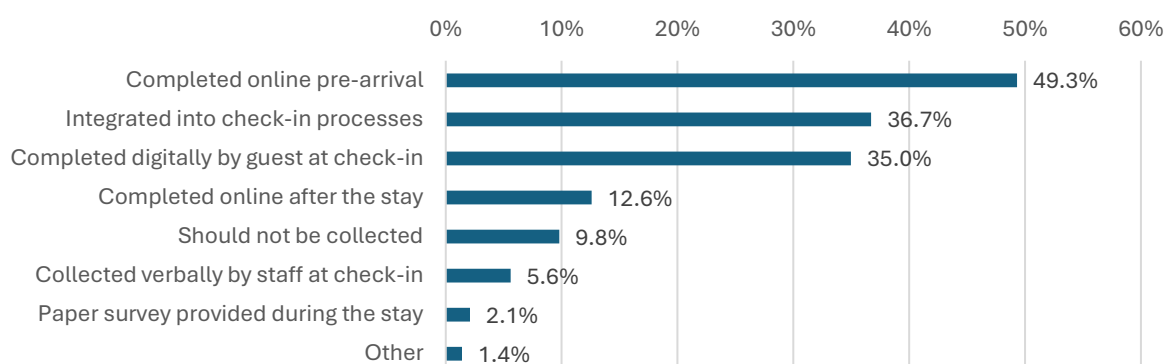
Note: As respondents could select multiple options, percentages do not total 100%.

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 most frequently selected option was ‘Completed online prior to arrival’ (49.3%), followed by ‘Integrated into existing check-in processes’ (36.7%) and ‘Completed digitally by guests at check-in’ (35%).

Smaller proportions supported ‘Completed online after the stay’ (12.6%), while 9.8% indicated that the information ‘Should not be collected.’ Few respondents favoured ‘Collected verbally by staff at check-in’ (5.6%), ‘Paper survey provided during the stay’ (2.1%), or ‘Other’ (1.4%).

Preferred Methods for Collecting Additional Profile Information (n=286)

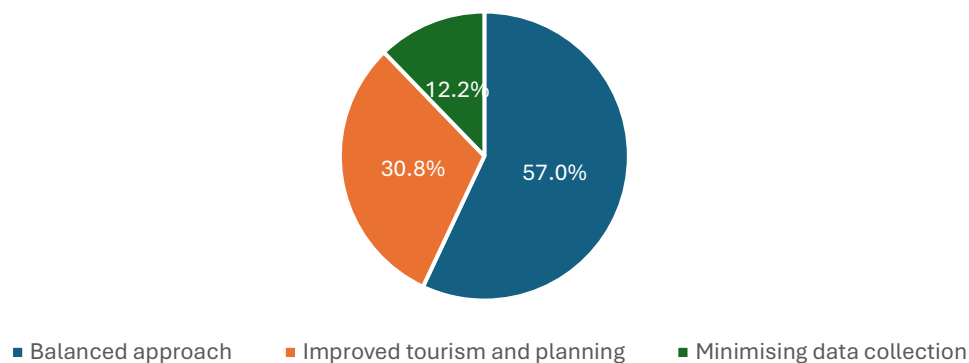


Note: As respondents could select multiple options, percentages do not total 100%.

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

The most common response was a '*Balanced approach*' between improved tourism planning and minimising data collection from visitors, which was selected by 57% of respondents. A further 30.8% prioritised '*Improved tourism planning*', while 12.2% indicated that '*Minimising data collection*' from visitors should be the primary consideration.

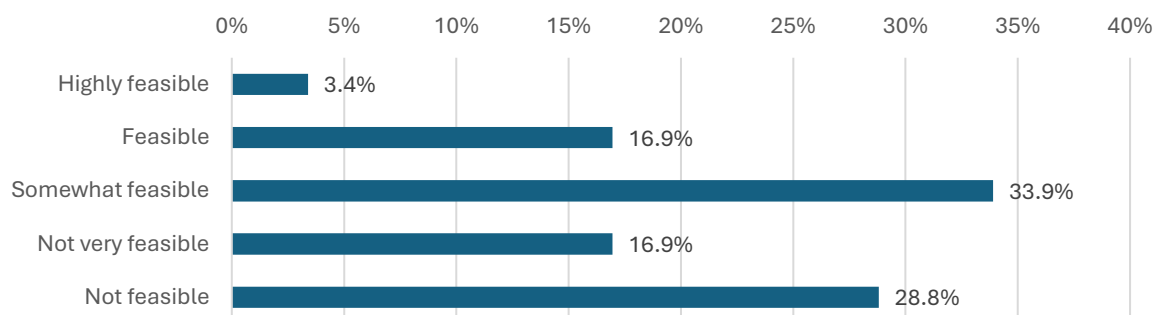
Priorities for the Collection and Use of Guest Data (n=286)



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

The most common response was '*Somewhat Feasible*' (33.9%), followed by '*Not Feasible*' (28.8%). Equal proportions of respondents considered integration to be '*Feasible*' (16.9%) and '*Not Very Feasible*' (16.9%), while only 3.4% regarded it as '*Highly Feasible*.'

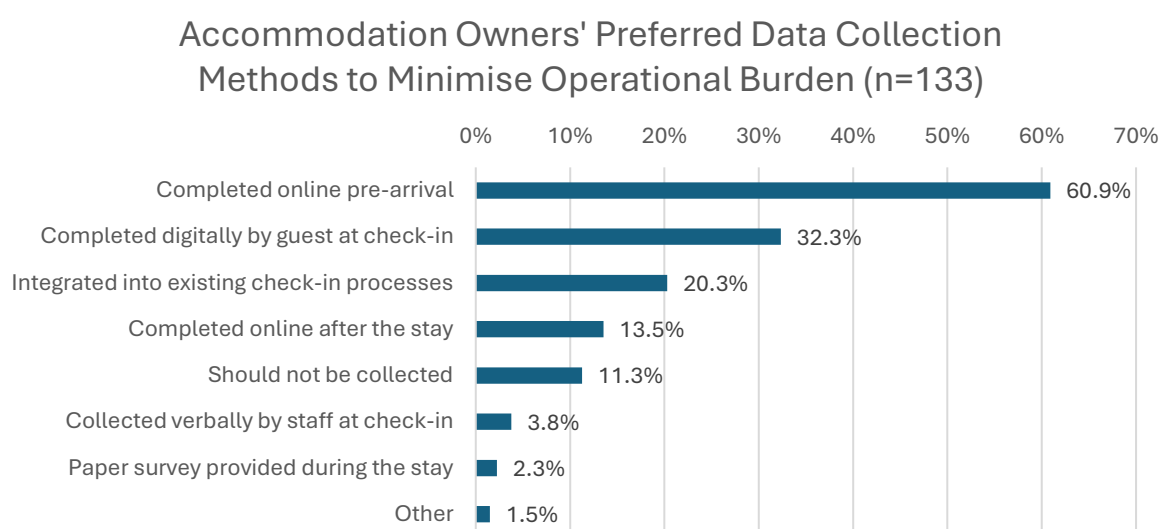
Perceived Feasibility of Integrating Visitor Data Collection into Existing Check-in Processes(n=118)



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

The most frequently selected option was ‘*Completed online prior to arrival*’ (60.9%). This was followed by ‘*Completed digitally by guests at check-in*’ (32.3%) and ‘*Integrated into existing check-in processes*’ (20.3%).

Smaller proportions of respondents favoured ‘*Completed online after the stay*’ (13.5%), while 11.3% indicated that the information ‘*Should not be collected.*’ Very few respondents supported ‘*Collected verbally by staff at check-in*’ (3.8%), ‘*Paper survey provided during the stay*’ (2.3%), or ‘*Other*’ methods (1.5%).

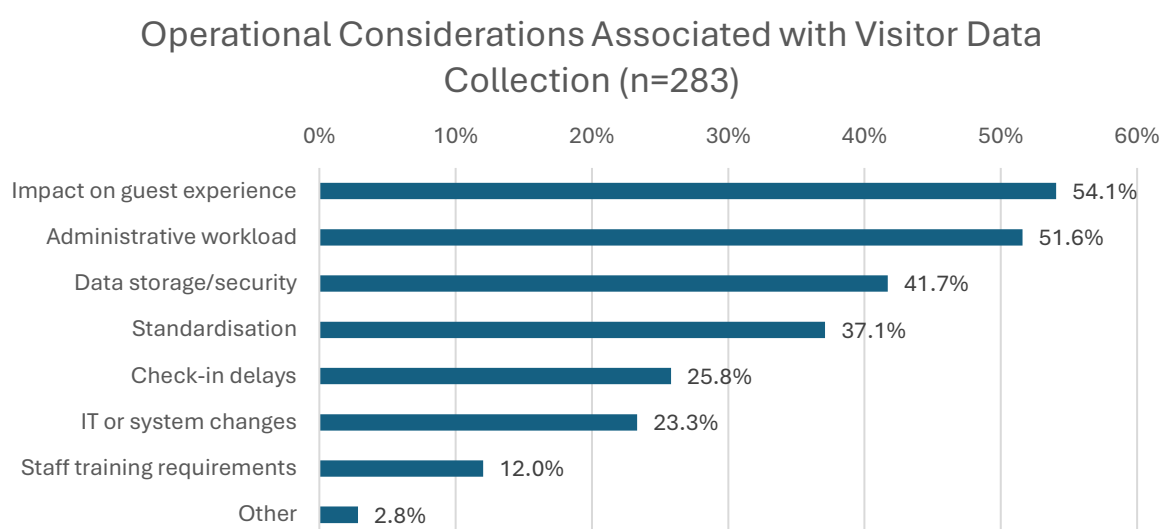


Note: As respondents could select multiple options, percentages do not total 100%.

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

The most frequently selected consideration was the ‘*Impact on guest experience*’ (54.1%), closely followed by additional ‘*Administrative workload*’ (51.6%). A substantial proportion of respondents also highlighted ‘*Data storage or security*’ obligations (41.7%) and the importance of ‘*Standardisation*’ across all accommodation types (37.1%). Smaller proportions identified ‘*Check-in delays*’ (25.8%), ‘*IT or system changes*’ (23.3%), and ‘*Staff training requirements*’ (12%) as relevant considerations.

A review of responses from accommodation owners showed a broadly similar pattern. Among accommodation owners, the most frequently cited operational considerations were the ‘*Impact on guest experience*’ (58.8%) and additional ‘*Administrative workload*’ (55%), followed by ‘*Data storage and security*’ obligations (40.5%).



Note: As respondents could select multiple options, percentages do not total 100%.

Section 7: Affordability and Availability

This section explores perceptions of accommodation affordability and availability across different visitor groups, and the factors influencing these challenges.

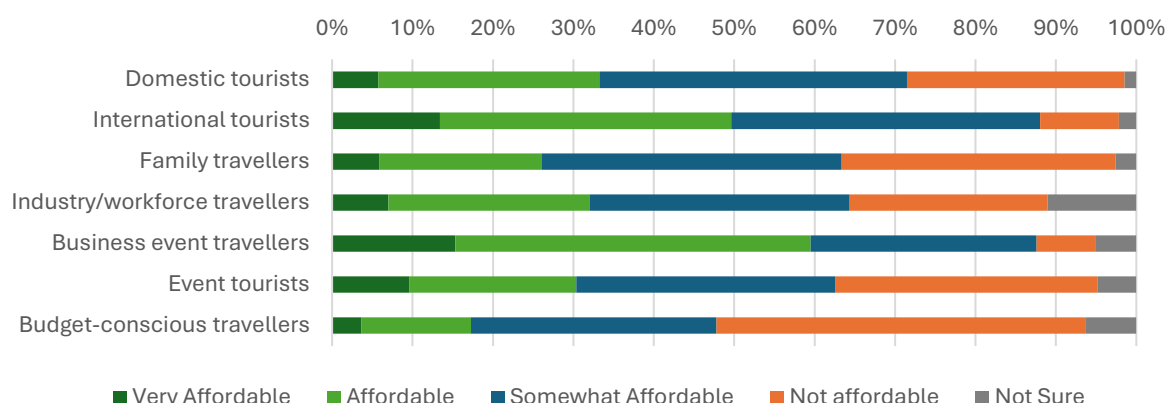
It examines which traveller categories are seen as most affected by accommodation pressures, the role of factors such as seasonality and major events in shaping availability and pricing, and potential solutions. Overall, it assesses how the tourism sector can better support a more affordable, accessible, and year-round accommodation offering.

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

‘Business event travellers’ were considered the least likely to experience affordability challenges, with 59.5% of respondents selecting *‘Affordable’* or *‘Very Affordable’*, compared with just 7.3% who considered it *‘Not Affordable’*. *‘International tourists’* were also viewed as relatively well served, with almost half (49.6%) perceived to have access to affordable accommodation.

By contrast, *‘Budget-conscious travellers’* were perceived to face the greatest affordability challenges, with 46% of respondents considering accommodation for this group to be *‘Not Affordable’*. *‘Family travellers’* (34.1%) and *‘Event tourists’* (32.6%) were also frequently identified as experiencing affordability pressures. Across most visitor categories, the largest proportion of respondents selected *‘Somewhat Affordable’*.

Perceived Affordability by Visitor Segment



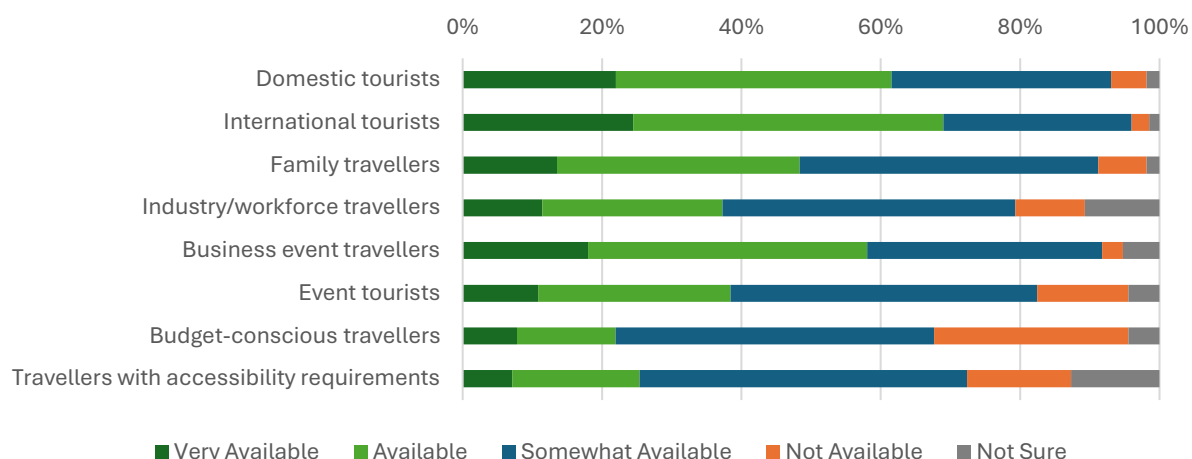
7.2 How would you assess the availability of tourist accommodation for the following visitor segments?

'International tourists' and *'Business event travellers'* were considered the best served, with 69% and 58.1% of respondents respectively rating accommodation availability for these groups as either *'Available'* or *'Very Available'*. *'Domestic tourists'* were viewed positively, with 61.6% perceiving accommodation to be available for this group.

'Budget-conscious travellers' were perceived to face the greatest availability challenges with more than one-quarter of respondents (27.9%) considering accommodation for this group to be *'Not Available'* compared with 14.1% who rated it as *'Available'* and 7.8% as *'Very Available'*. *'Travellers with accessibility requirements'* (14.9%) and *'Event tourists'* (13.1%) were also more likely than other groups to be perceived as experiencing availability constraints.

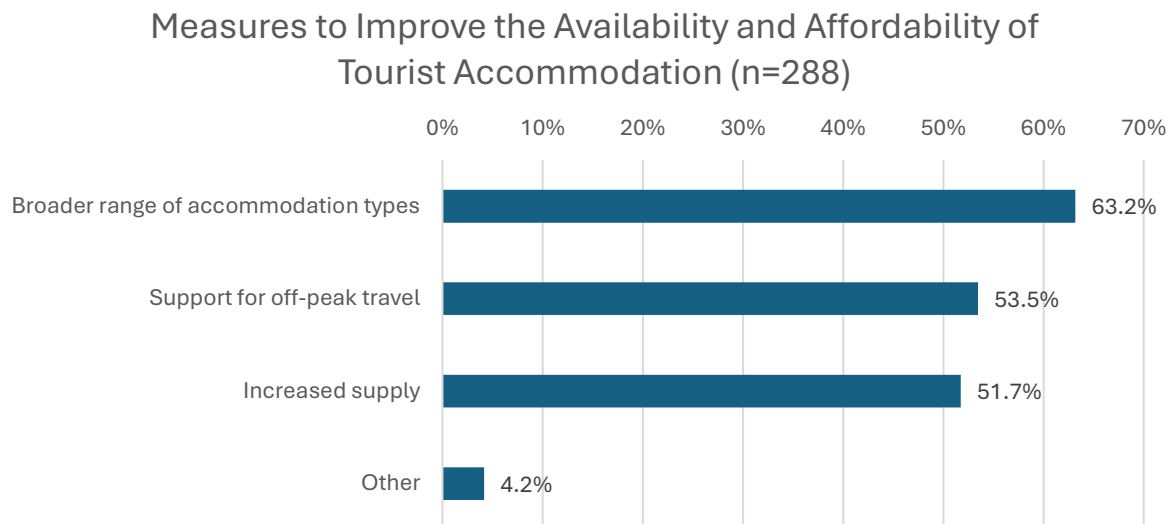
Across most visitor categories, the largest proportion of respondents selected *'Somewhat Available'*.

Perceived Availability by Visitor Segment



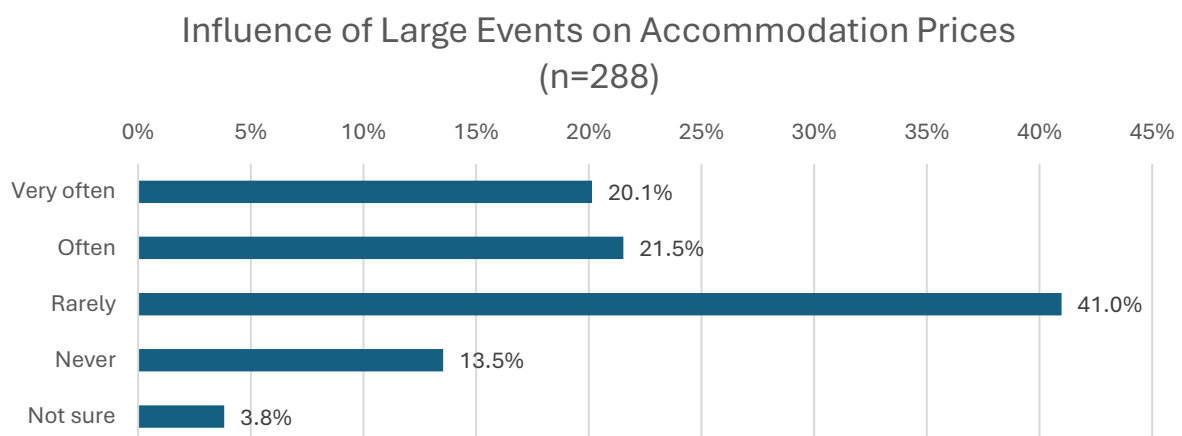
7.3 What measures could most improve availability and affordability of tourist accommodation?

The most frequently selected measure was a '*Broader range of accommodation types*' (63.2%), followed by '*Support for off-peak travel*' (53.5%) and '*Increased supply*' (51.7%). A small proportion of respondents selected '*Other*' measures (4.2%).



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

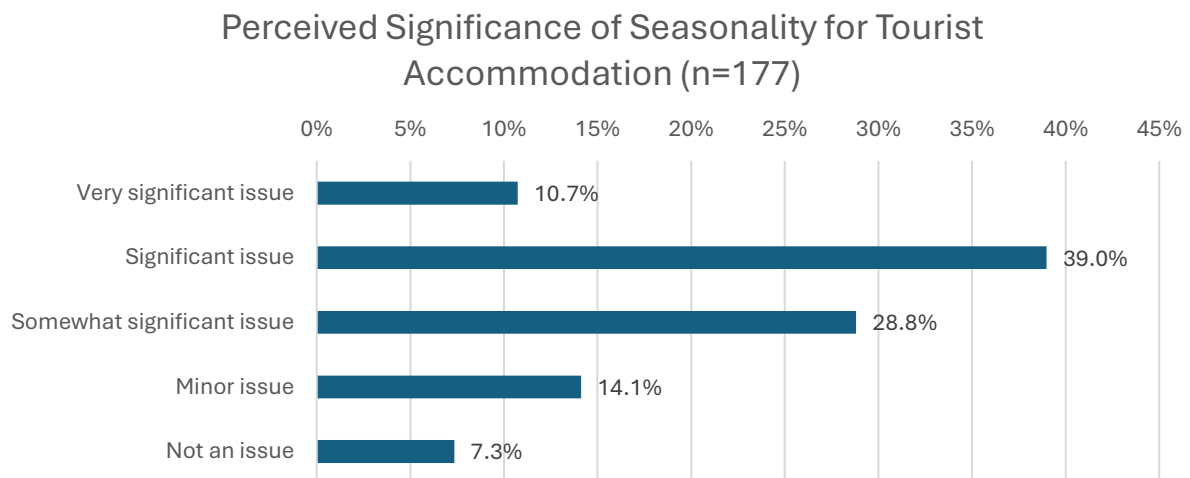
The most common response was '*Rarely*' (41%), while 20.1% indicated that large events '*Very often*' influence prices and 21.5% reported that they '*Often*' do so. A small proportion of respondents (3.8%) were '*Not sure*'.



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

The most common response was '*Significant issue*' (39%), while a further 10.7% rated seasonality as a '*Very significant issue*'. An additional 28.8% considered it to be a '*Somewhat significant issue*'.

By comparison, 14.1% of respondents regarded seasonality as a ‘*Minor issue*’, while 7.3% indicated that it was ‘*Not an issue*’.

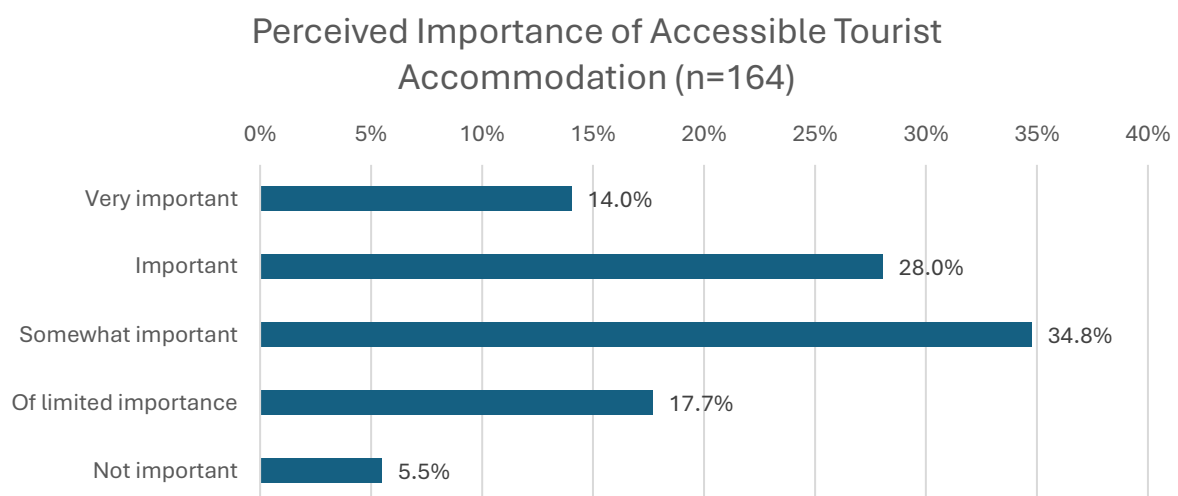


Section 8: Accessibility

This section explores respondent views on the importance of accessible tourist accommodation, the adequacy of current provision, and priorities for improving accessibility within Ireland's tourism accommodation sector.

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

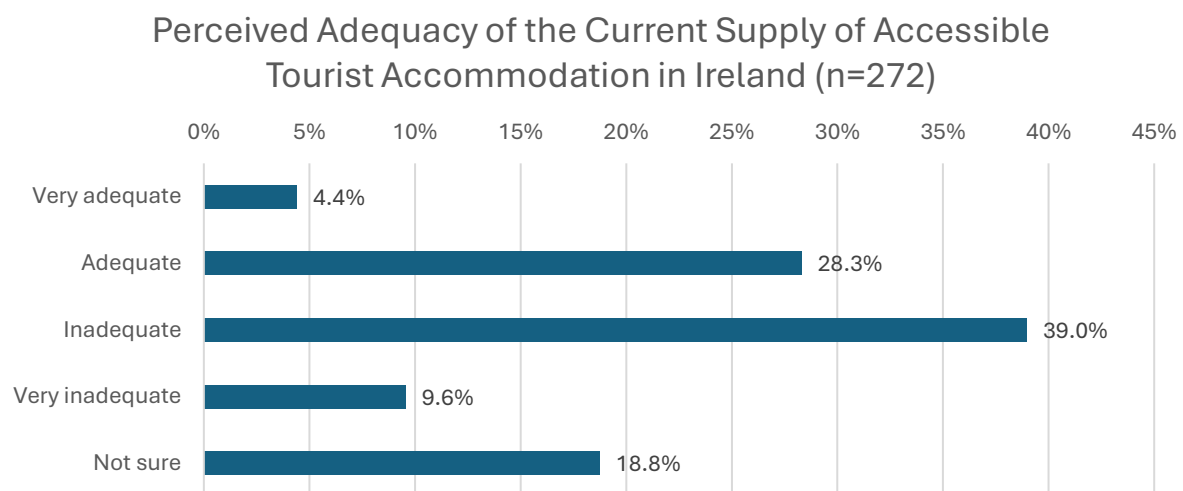
The most common response was ‘*Somewhat important*’ (34.8%), with 42% considering accessible accommodation to be ‘*Important*’ or ‘*Very important*’. By comparison, 23.2% viewed it as being ‘*Of limited importance*’ or ‘*Not Important*’.



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

The most common response was '*Inadequate*' (39%), followed by '*Adequate*' (28.3%) and '*Not sure*' (18.8%). Smaller proportions considered the supply to be '*Very inadequate*' (9.6%) or '*Very adequate*' (4.4%).

While 42% of respondents regarded accessible accommodation as '*Important*' or '*Very Important*' within the overall accommodation offering (responses to question 8.1), 48.6% considered the current supply to be '*Inadequate*' or '*Very inadequate*' (as per table below).

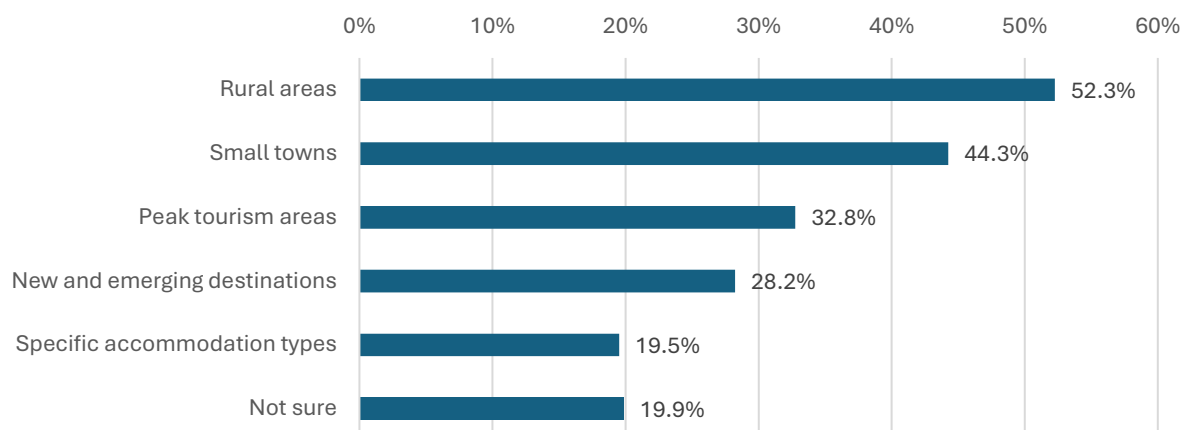


8.3 Where, if anywhere, do you believe the greatest need for additional accessible tourist accommodation is most evident?

The most frequently selected location was '*Rural areas*' (52.3%), followed by '*Small towns*' (44.3%). Around one-third of respondents also identified '*Peak tourism areas*' (32.8%) as locations where additional accessible accommodation is needed.

Smaller, but still notable, proportions highlighted '*New and emerging destinations*' (28.2%), while '*Specific accommodation types*' (19.5%) and '*Not sure*' (19.9%) were selected less frequently.

Locations Where Additional Accessible Tourist Accommodation Is Most Needed (n=287)



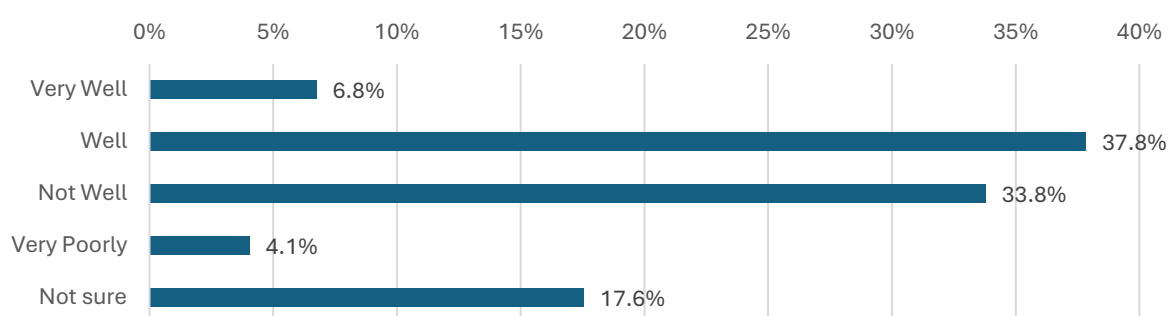
Note: As respondents could select multiple options, percentages do not total 100%.

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.

The most common response was 'Well' (37.8%), followed closely by 'Not Well' (33.8%). Smaller proportions considered existing accessible accommodation to meet user needs 'Very Well' (6.8%) or 'Very Poorly' (4.1%), while 17.6% indicated that they were 'Not sure'.

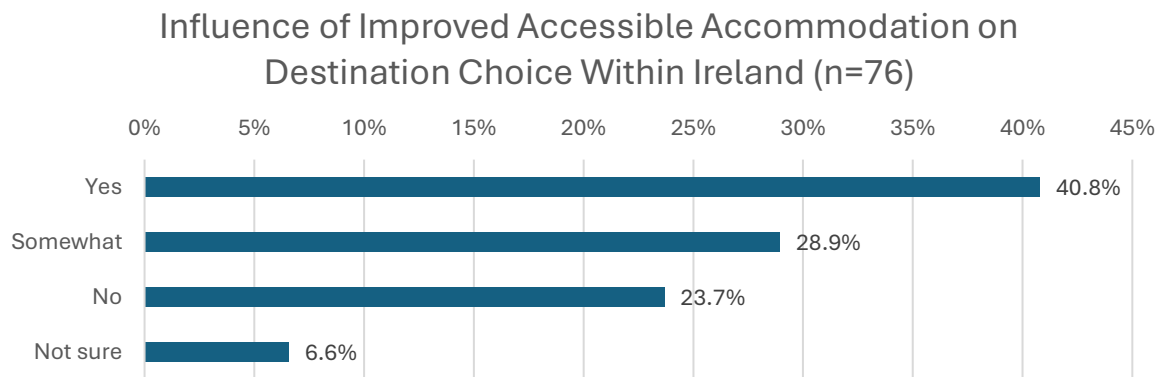
How Well Existing Accessible Accommodation Meets User Needs (n=74)



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.

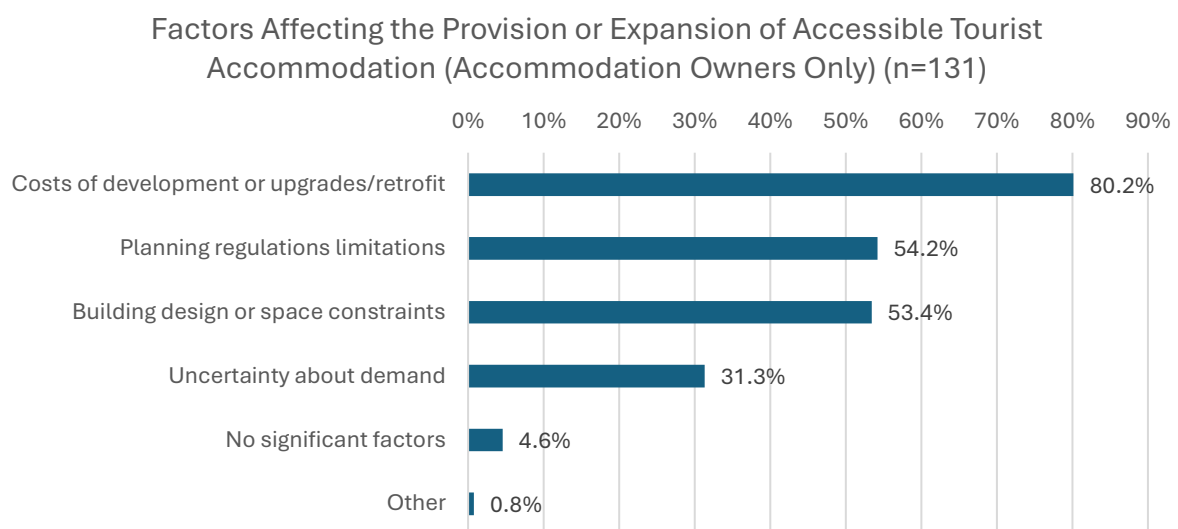
The largest proportion of respondents (40.8%) indicated ‘Yes’ that improved accessible accommodation would influence their choice of destination, while a further 28.9% reported that it would ‘*Somewhat*’ influence their decision. By comparison, 23.7% stated that improved accessible accommodation would not influence their destination choice, while 6.6% were ‘*Not sure*’.



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

The most frequently selected factor was ‘*Costs of development, upgrades or retrofitting*’ (80.2%). More than half of respondents identified ‘*Planning regulation limitations*’ (54.2%) and ‘*Building design or space constraints*’ (53.4%) as significant factors.

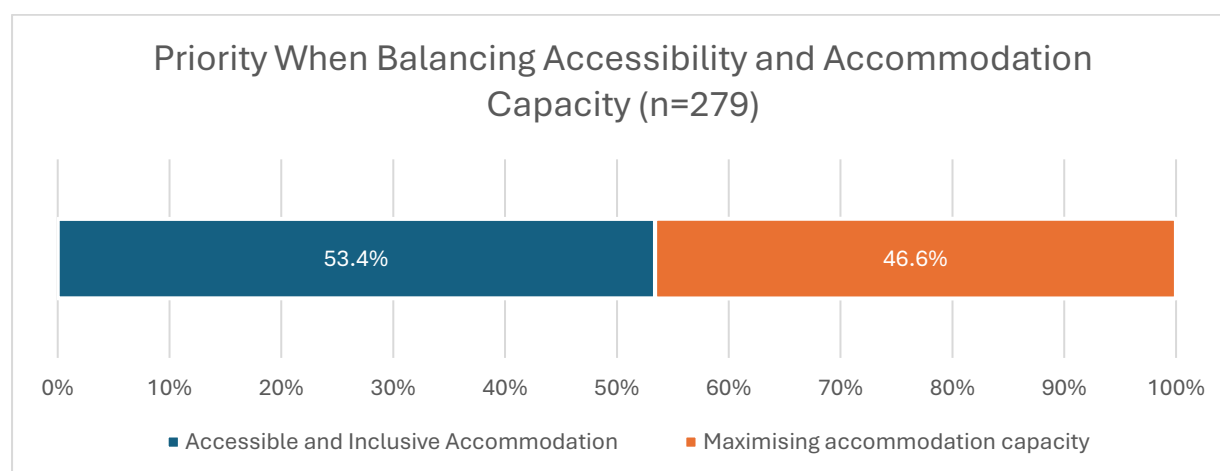
Around one-third of respondents (31.3%) identified ‘*Uncertainty about demand*’ as a factor affecting investment decisions. By contrast, relatively few respondents indicated that there were ‘*No significant factors*’ (4.6%), while only one respondent selected ‘*Other*’ (0.8%).



Note: As respondents could select multiple options, percentages do not total 100%.

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

A majority (53.4%) prioritised ‘Accessible and Inclusive Accommodation’, while 46.6% favoured ‘Maximising accommodation capacity’.



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.

The most frequently referenced theme related to ‘*Planning, Regulation, Standards and Heritage Flexibility*’. A second prominent theme concerned ‘*Practical Implementation and Understanding Accessibility Needs*’.

Respondents also referred to ‘*Accommodation Capacity and Supply*’, and ‘*Costs and Financial Supports*’.

Smaller numbers of respondents highlighted the importance of ‘*Accessibility and Inclusion*’ as a guiding principle, the need for investment in ‘*Broader Accessibility Infrastructure*’, and considerations relating to the ‘*Demand, Utilisation and Provision*’ of accessible accommodation.

Theme	Example Sub-Themes	Mentions
Planning, Regulation, Standards and Heritage Flexibility	Building regulations, accessibility standards, flexibility for older and heritage buildings, proportional requirements	16
Practical Implementation and Understanding Accessibility Needs	Clear accessibility definitions, accessibility information, diverse accessibility needs, guide dogs, user consultation	12

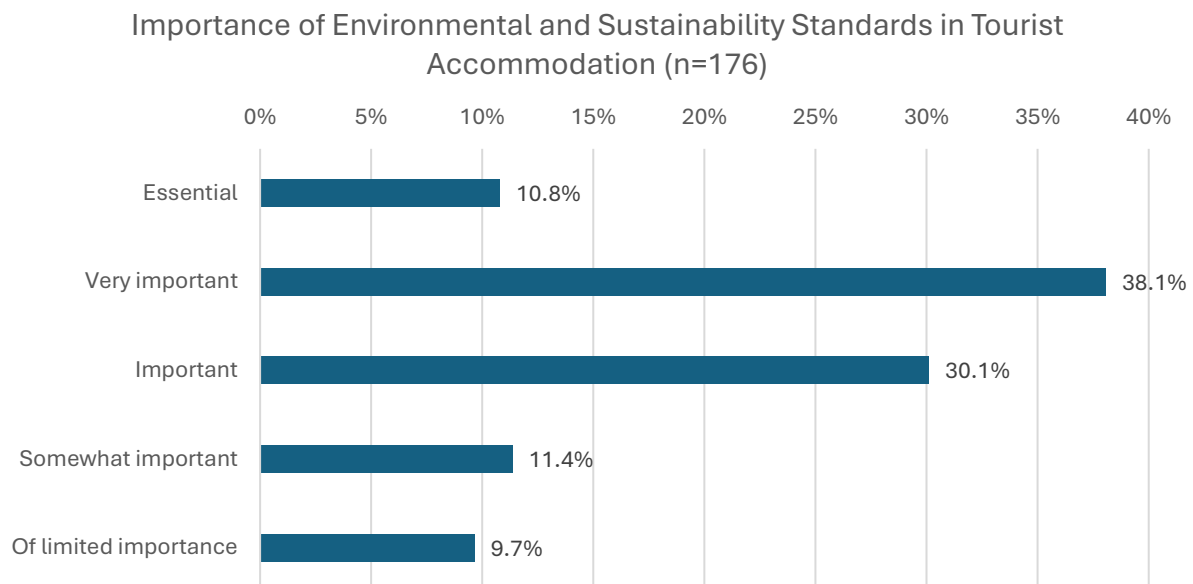
Accommodation Capacity and Supply	Overall accommodation availability, retention of tourism accommodation, accommodation diversity and capacity	10
Costs and Financial Supports	Grants, incentives, retrofit costs, affordability of upgrades	9
Accessibility and Inclusion	Accessible accommodation as the norm, universal design, inclusive provision	7
Broader Accessibility Infrastructure	Accessible public transport, footpaths, public toilets, parking and wider tourism infrastructure	5
Demand, Utilisation and Provision	Occupancy of accessible rooms, demand levels, utilisation of accessible accommodation	5

Section 9: Environmental Standards and Sustainability

This section explores views on the importance of environmental sustainability standards in tourist accommodation and the measures that should be prioritised to achieve them.

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

Almost half of respondents rated such standards as either ‘*Essential*’ (10.8%) or ‘*Very Important*’ (38.1%), while a further 30.1% considered them ‘*Important*’. By comparison, 11.4% considered them ‘*Somewhat Important*’, while 9.7% viewed them as being of ‘*Limited Importance*’.

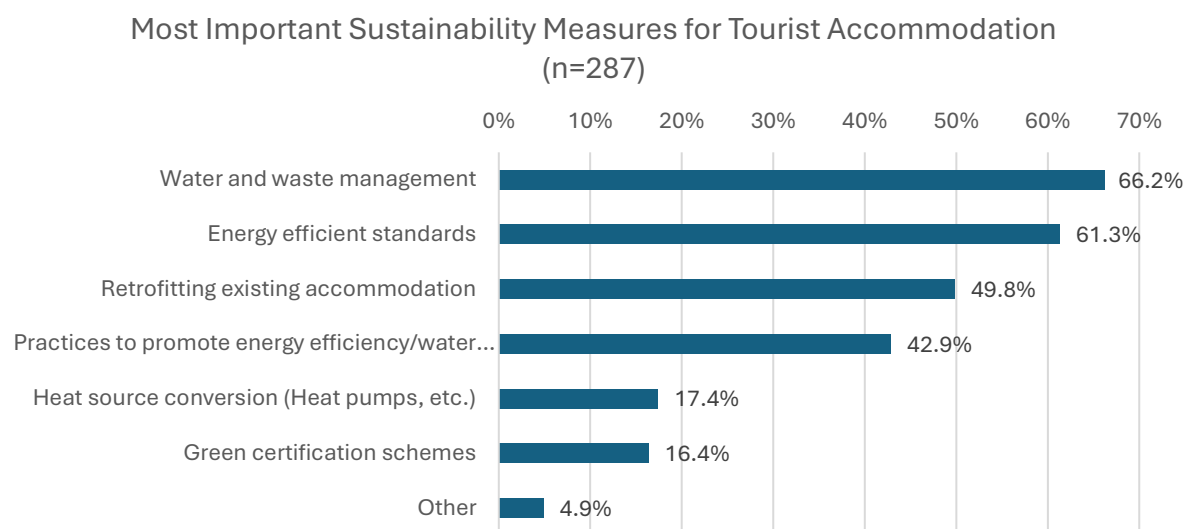


Note: A total of 176 respondents provided a valid response to this question, while 123 respondents did not answer. Percentages are based on valid responses only.

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

The most frequently selected measure was *‘Water and waste management’* (66.2%), followed by *‘Energy efficient standards’* (61.3%). Nearly half (49.8%) identified *‘Retrofitting existing accommodation’* (improving insulation, etc.) as a priority, while *‘Practices to promote energy efficiency and water conservation’* were selected by 42.9%.

Less frequently selected measures included *‘Heat source conversion (heat pumps, etc.)’* (17.4%) and *‘Green certification schemes’* (16.4%). Respondents that selected *‘Other’* totalled 4.9%.



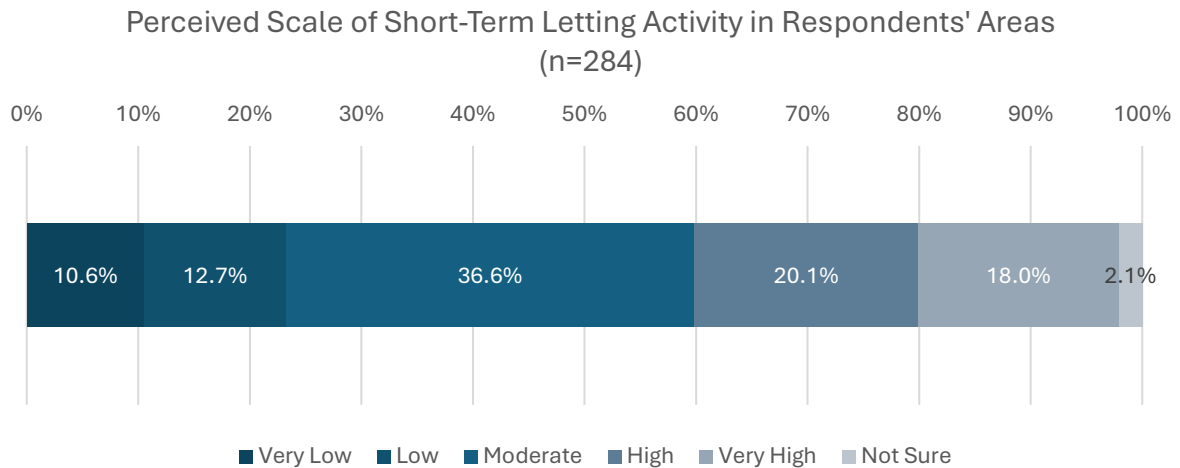
Note: As respondents could select multiple options, percentages do not total 100%.

Section 10: Short-Term Lettings

This section explores respondents' perceptions of the impacts of short-term letting (STL) in their local areas.

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

The most common response was *‘Moderate’* (36.6%), while a slightly larger proportion (38%) rated activity as *‘High’* or *‘Very High’*. In contrast, 23.2% considered activity to be *‘Low’* or *‘Very Low’*.

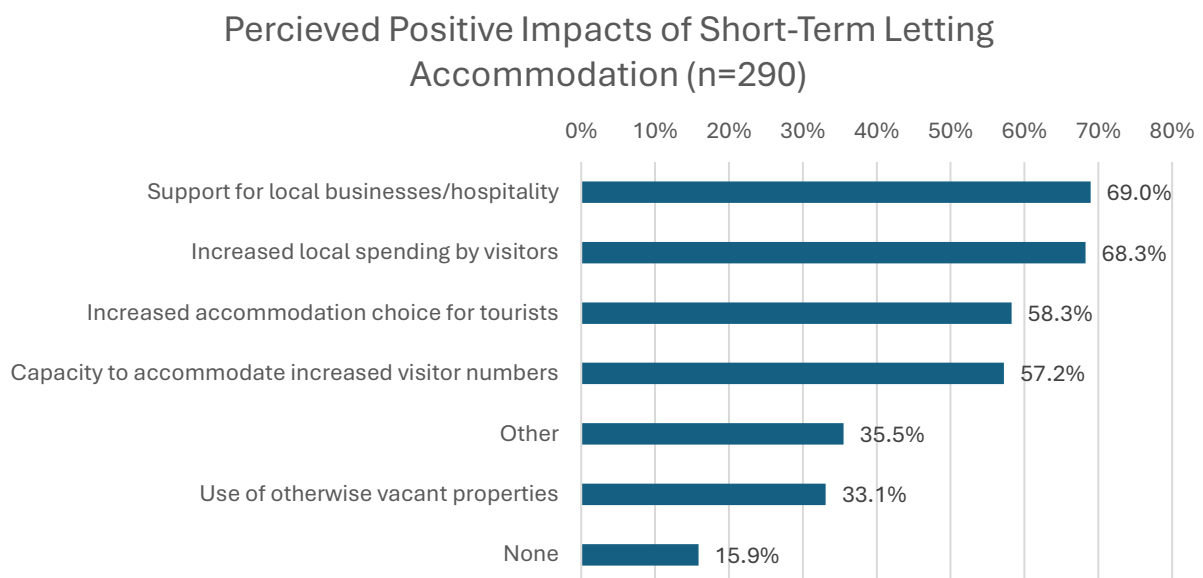


10.2 What, if any, positive impacts does short-term letting accommodation have in your area? (Select all that apply)

Almost seven in ten respondents selected '*Support for local businesses/hospitality*' (69%) and '*Increased local spending by visitors*' (68.3%).

A majority (58.3%) selected '*Increased accommodation choice for tourists*' with 57.2% selecting '*Capacity to accommodate increased visitor numbers*'.

Around one-third of respondents identified '*Use of otherwise vacant properties*' (33.1%) as a positive impact, while 35.5% selected '*Other*'. A smaller proportion of respondents (15.9%) indicated that short-term letting accommodation had no positive impacts in their area.



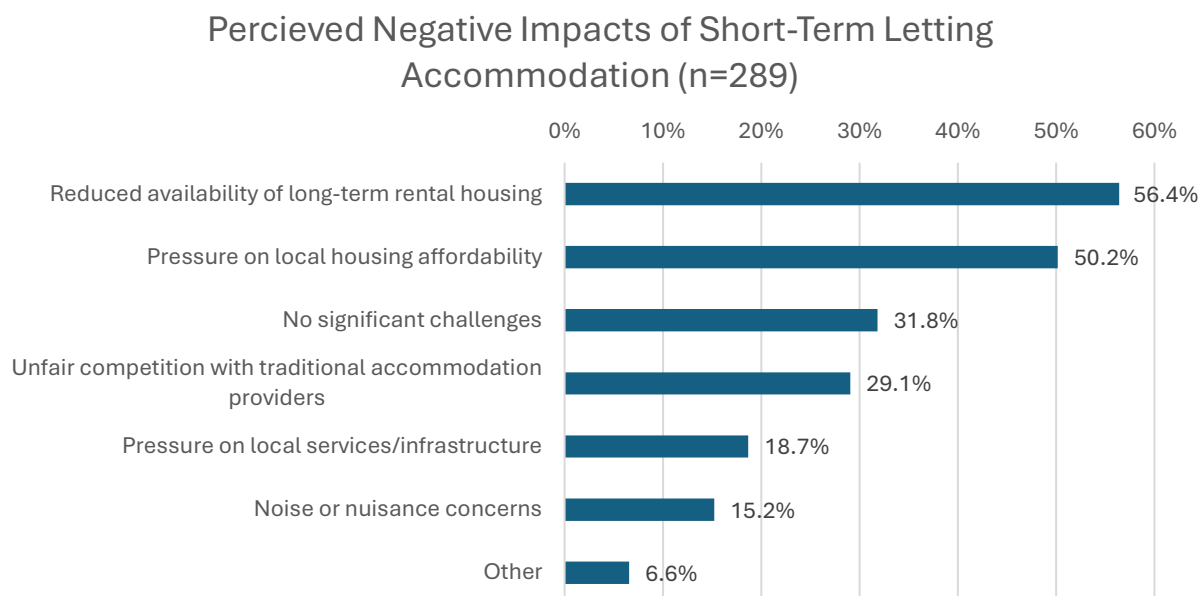
Note: As respondents could select multiple options, percentages do not total 100%.

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

More than half of respondents identified '*Reduced availability of long-term rental housing*' (56.4%), while 50.2% identified '*Pressure on local housing affordability*'.

Almost one-third of respondents (31.8%) indicated that short-term letting accommodation presented '*No significant challenges*' in their area. However, 29.1% identified '*Unfair competition with traditional accommodation providers*' as a negative impact.

Smaller proportions of respondents highlighted '*Pressure on local services and infrastructure*' (18.7%) and '*Noise or nuisance concerns*' (15.2%). A small proportion of respondents selected '*Other*' impacts (6.6%).

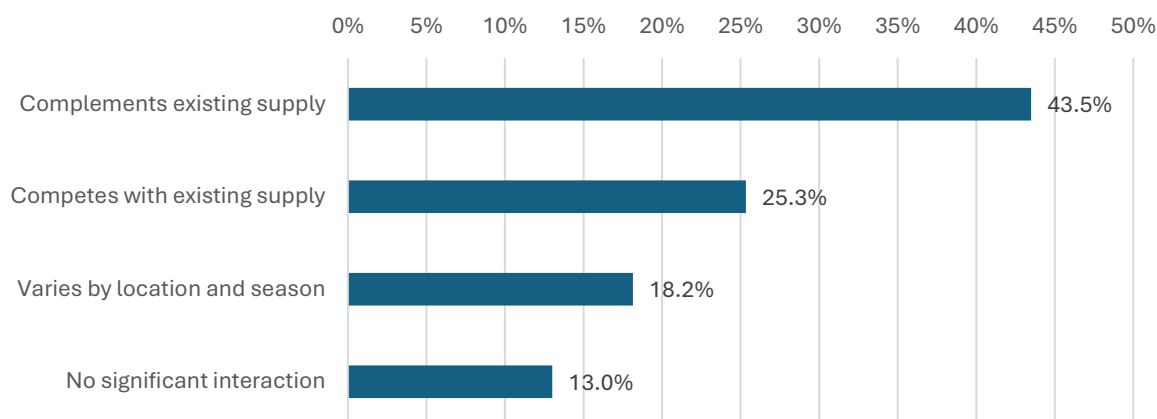


Note: As respondents could select multiple options, percentages do not total 100%.

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

43.5% of respondents consider that short-term letting '*Complements existing supply*' (43.5%). Around one-quarter of respondents (25.3%) considered it '*Competes with existing supply*', while 18.2% indicated that the effect '*Varies by location and season*'. A further 13% reported '*No significant interaction*' between short-term letting accommodation and other accommodation providers in their area.

Perceived Effects of Short-Term Letting on Other Tourist Accommodation (n=292)



Section 11: Regional Balance & Rural Tourism

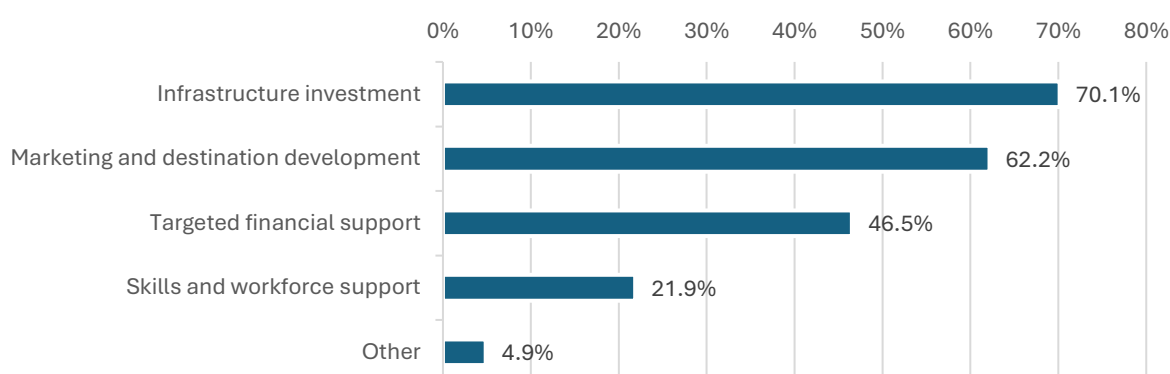
This section explores respondent views on the development of tourist accommodation in rural and regional destinations.

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

‘Infrastructure investment’ (70.1%) was the most frequently selected measure, followed by ‘Marketing and destination development’ (62.2%), while almost half of respondents (46.5%) highlighted the importance of ‘Targeted financial support’.

A smaller proportion of respondents identified ‘Skills and workforce support’ (21.9%) as a priority with 4.9% of respondents selecting ‘Other’.

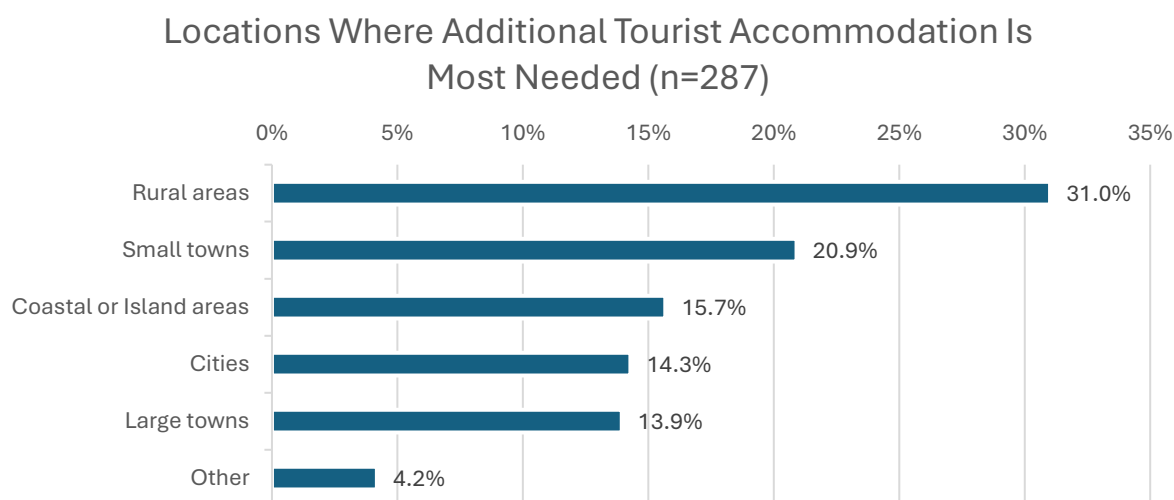
Priorities for Rural and Regional Tourist Accommodation (n=288)



Note: As respondents could select multiple options, percentages do not total 100%.

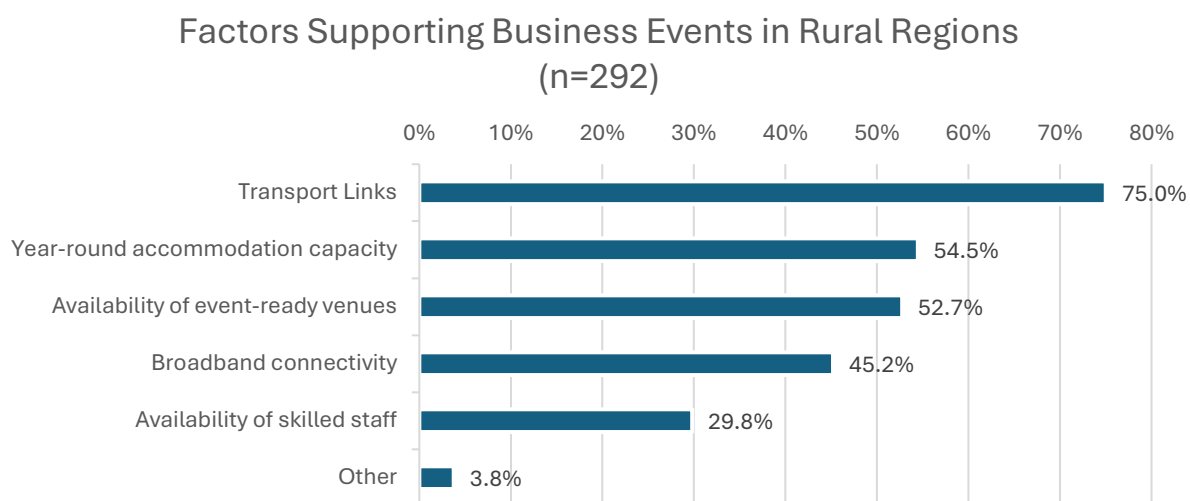
11.2 Where is additional tourist accommodation most needed?

'Rural areas' (31%) was the most frequently selected location, followed by 'Small towns' (21%) and 'Coastal or Island areas' (16%). 'Cities' and 'Large towns' each accounted for 14% of responses, while 4% selected 'Other'.



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)

'Transport links' were the most frequently selected factor, identified by 75% of respondents. 'Year-round accommodation capacity' (54.5%) and the 'Availability of event-ready venues' (52.7%) were also identified by over half of respondents. 'Broadband connectivity' was selected by 45.2% of respondents, while 29.8% highlighted the 'Availability of skilled staff'. A small proportion of respondents selected 'Other' (3.8%).



Note: As respondents could select multiple options, percentages do not total 100%.

Section 12: Additional Comments and Thematic Analysis

Respondents were invited to provide any additional comments with a total of 139 responses returned. Responses were analysed thematically and grouped into several recurring themes.

The table below summarises the frequency with which each theme was identified.

Table 12.1: Themes Identified in Additional Comments

Theme	Example Sub-Themes	Mentions
Short-Term Letting Accommodation	STL regulation, rural tourism, housing impacts, registration	62
Rural and Regional Tourism Development	Visitor dispersal, seasonality, regional investment, rural economies	36
Planning, Regulation and Policy	Planning permission, change of use, regulation, governance	33
Sustainability, Communities and Housing	Housing availability, staff accommodation, community wellbeing, sustainability	29
Tourism Product and Destination Development	Events, attractions, culture, visitor experiences	28
Accommodation Types and Diversity	B&Bs, self-catering, glamping, farm stays, motorhomes	26
Financial Supports, Taxation and Investment	Grants, tax incentives, business costs, investment	23
Accommodation Capacity and Supply	Accommodation shortages, hotel capacity, existing stock	19
Infrastructure and Connectivity	Public transport, roads, broadband, visitor facilities	19
Accommodation Affordability and Pricing	Cost of accommodation, value for money, family affordability	11
Non-Tourism Use of Tourist Accommodation	IPAS, emergency accommodation, tourism capacity	11

Note: Four responses were classified as *Invalid/No Comment* and excluded from the thematic analysis.

Summary

Respondents highlighted the interconnected nature of tourist accommodation, planning, regional development, housing, infrastructure, and community wellbeing. Short-term letting accommodation emerged as the most frequently discussed topic, reflecting differing perspectives regarding its role in supporting tourism and its relationship with housing. More broadly, respondents emphasised the importance of increasing accommodation capacity, supporting rural tourism development, improving infrastructure and connectivity, maintaining a diverse accommodation offering, and ensuring that future tourism growth is balanced with community wellbeing and environmental sustainability.

Section 13: Written Submissions

Although written submissions were not sought as part of the consultation process, three submissions were received from industry stakeholders. As those submissions were not structured around the consultation questionnaire, they have been considered separately from the survey findings presented elsewhere in this report.

The issues raised within the written submissions can be grouped into six broad themes:

- Accommodation Capacity, Supply and Future Demand
- Regional and Rural Tourism Development
- Investment, Development and Planning
- Regulation, Standards and Competitiveness
- Sustainability, Accessibility and Data
- Economic Contribution of Tourism Accommodation