



Accessible and Inclusive Tourism

Accessible and Inclusive
Tourism Industry Report





Key Findings



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- There is a large gap in pre-visit information, and provision of accessible services is not equally distributed across business types.
- Many businesses view accessibility improvements through the lens of removing physical barriers to access.
- Cost and physical restrictions are key challenges and barriers for businesses.
- Businesses want both financial and practical supports to enhancing the accessibility of their business.
- Businesses that do provide accessible services have seen the benefits such as enhanced reputation and profitability.

Industry Perceptions

94%

Agree that accessibility improvements mean people with disabilities and older people can enjoy equal access to their experience.

78%

Believe that accessibility improvements are primarily about removing physical barriers to access.

41%

Believe accessibility enhancements imply high costs.

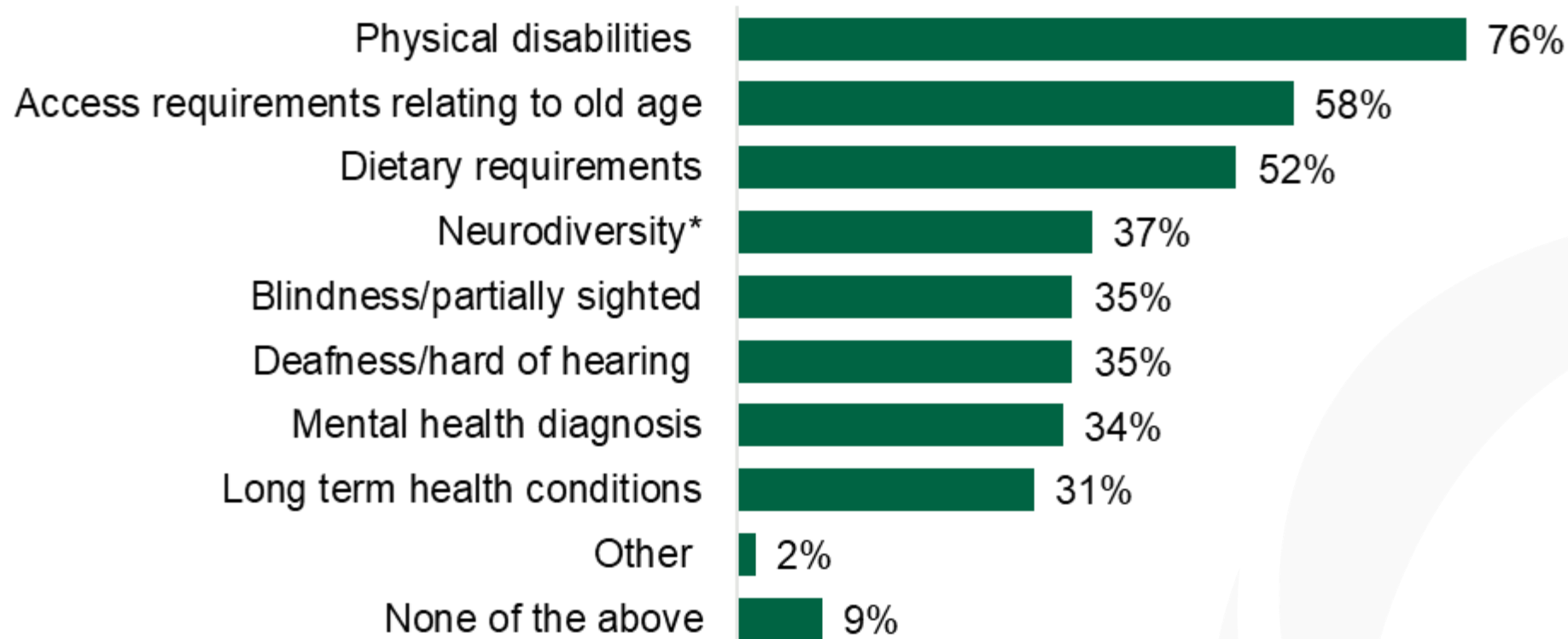




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Current provision of
accessible and inclusive
services.



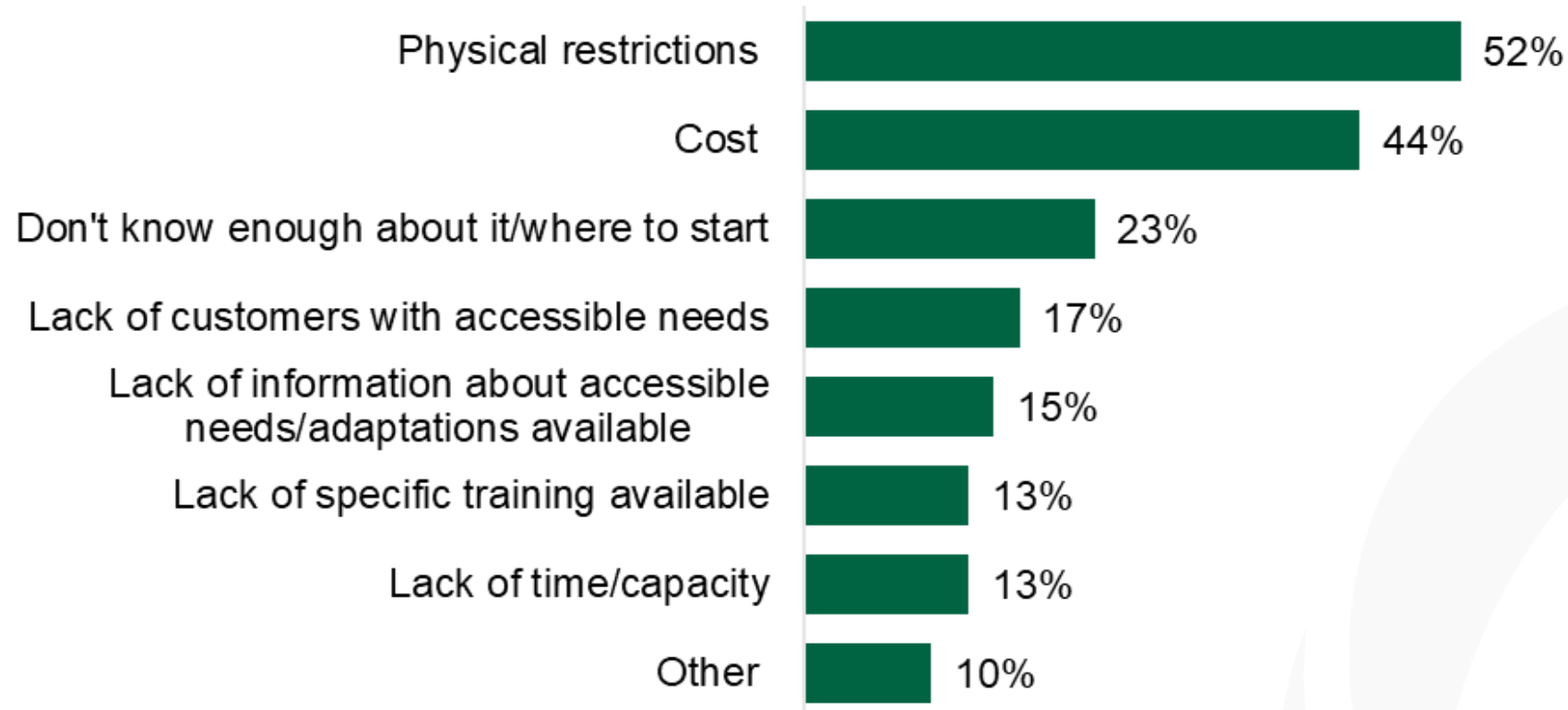


91% of businesses who responded to the survey provide accessible services. Just over three quarters (76%) provide services for people with a physical disability, while more than half provide services for individuals with access requirements relating to ageing and specific dietary requirements.

Reason for not providing accessible services



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Of the 9% of businesses that do not provide accessible services, physical restrictions (52%) and cost (44%) were identified as the key barriers in addition to (23%) indicating that they have a knowledge gap about accessible services and do not know where to start.

Benefits from providing accessible services



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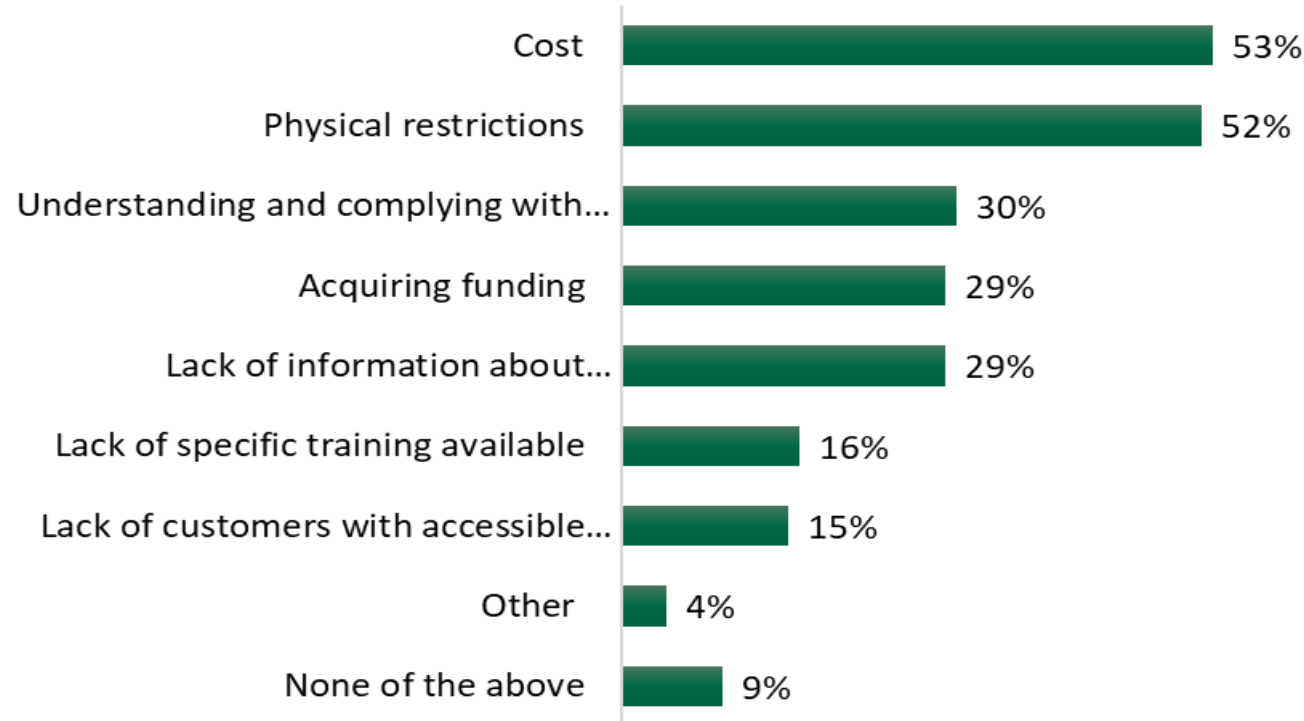


90% of businesses have noticed at least one benefit from providing accessible services. Around three quarters (73%) report increased satisfaction, while more than half said they have better engagement with customers, an improved reputation, and repeat business.

Challenges in providing accessible services



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Cost (53%) and physical restrictions (52%) were identified as the greatest challenge in providing accessible services. Some businesses commented that, despite wanting to make adaptations, protected building status means that changes are either not possible or depend on lengthy planning approval.

Inclusive Employment



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36% of businesses have inclusive recruitment practices in place and of these businesses 54% employ people with disabilities.

Businesses with inclusive recruitment practices or employees with disabilities are more confident that they know what disability legislation applies to their business and are more positive that improving accessibility has or could enhance business reputation and profitability.



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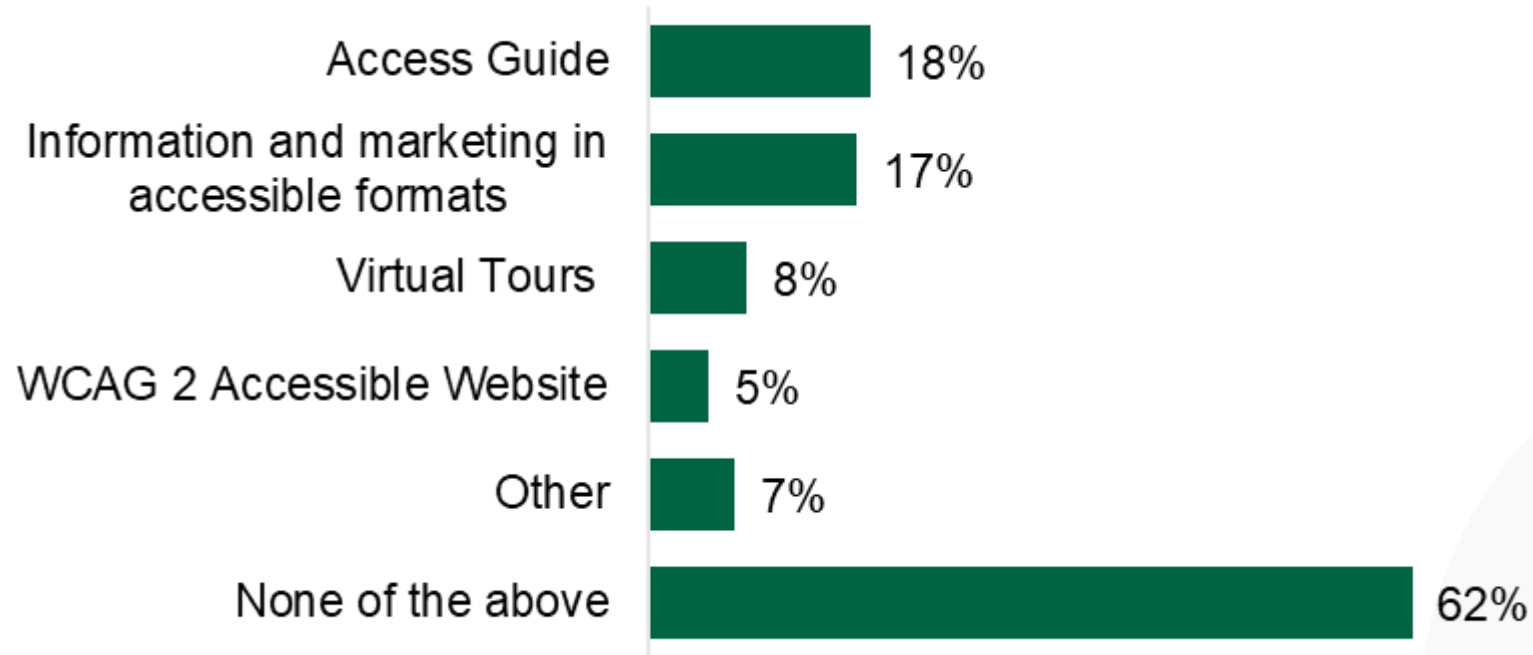
Accessibility Services
and Features



Pre-Travel Information



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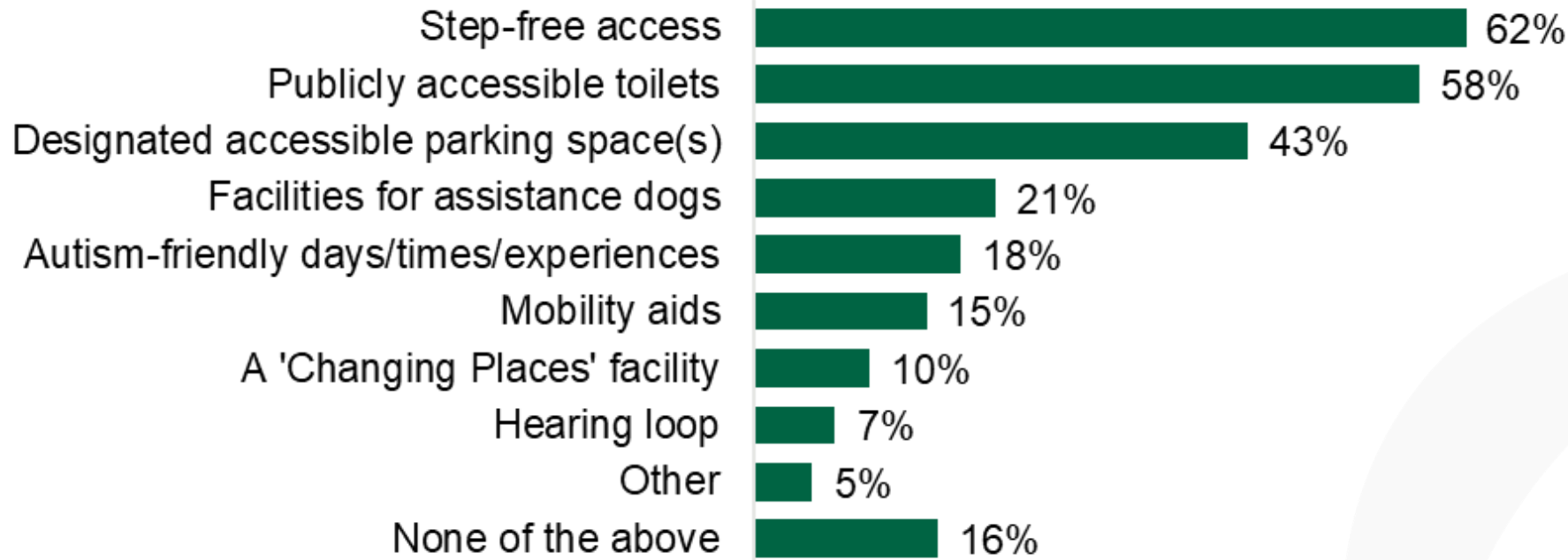
Six in ten businesses (62%) do not provide any pre-visit information or websites suitable for people with accessible needs.

While around a fifth of organizations provide Access Guides (18%) and/or information and marketing in accessible formats (17%), few provide multiple types of accessible pre-visit information.

Accessibility features within the business



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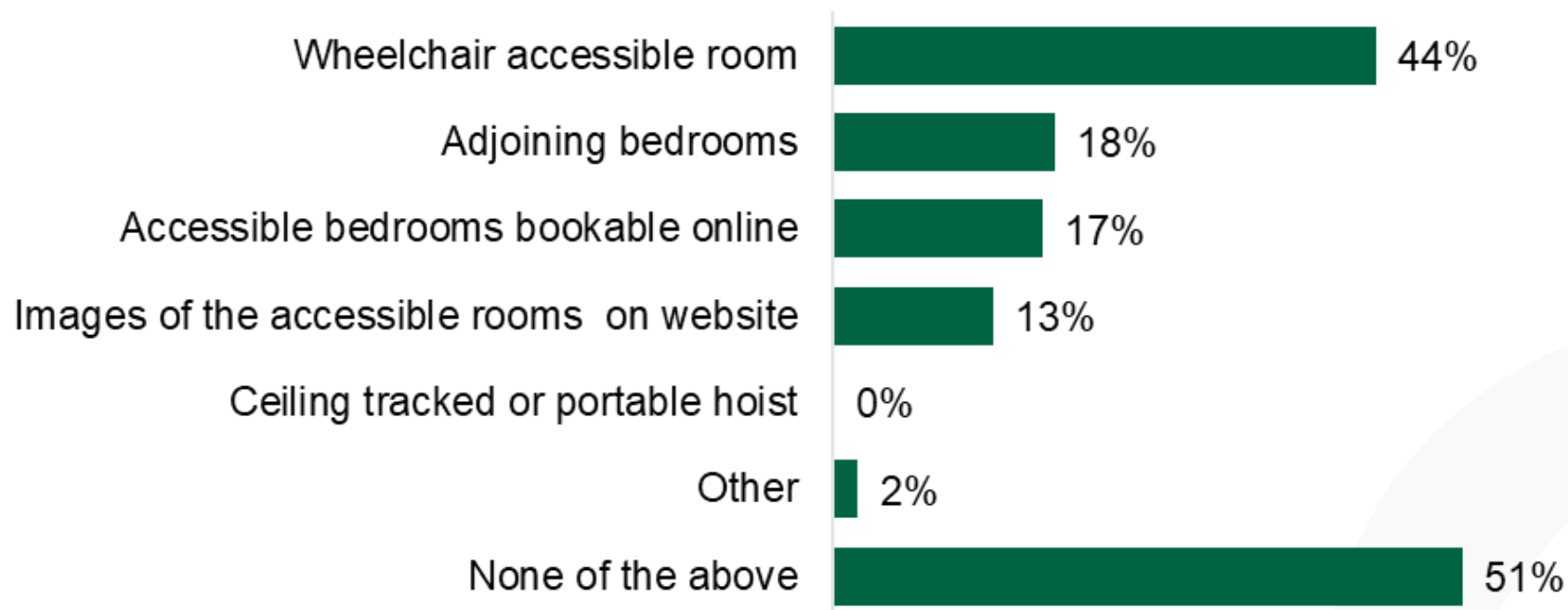


Step-free access, publicly accessible toilets and designated accessible parking spaces are the most common access features provided by respondents. Around a fifth have provision for assistance dogs and autism-friendly days/times/experiences, and less than 1 in 10 businesses have a hearing loop (7%).

Accessibility features in accommodation businesses



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Half of responding accommodation businesses don't provide any accessible bedrooms. However, this varies considerably depending on accommodation type.

83% of hotels provide wheelchair accessible rooms, and almost half provide adjoining rooms (46%) and online bookings for accessible bedrooms (41%). Less than 25% have images of their accessible rooms on their website.

No accommodation providers surveyed provide a ceiling tracked or portable hoist.



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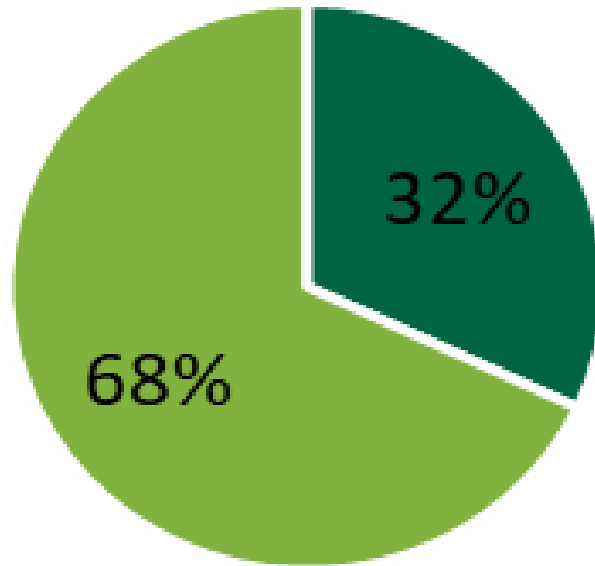
Training and Supports



Staff Training & Knowledge Gap



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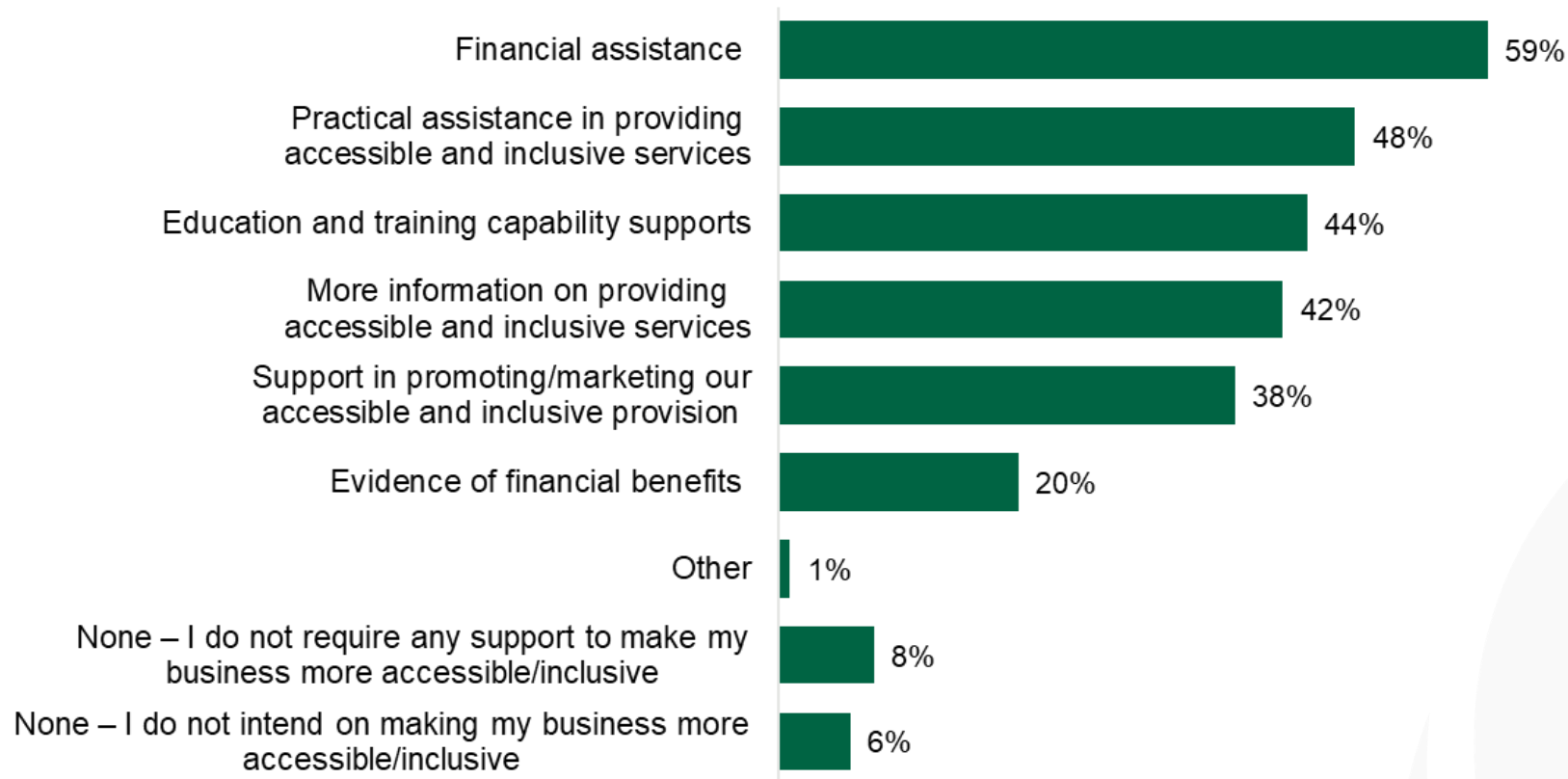


■ **Yes** ■ **No**

68% of respondents have not undertaken any staff training in welcoming guests who have access requirements.

When asked about supports to enhance accessible provision, businesses sought a better understanding of accessible and inclusive tourism in general (46%), more guidance on staff training (44%), how to provide information in an accessible way (43%), and understanding/complying with legislation (42%).

Supports identified to enhance provision



Financial assistance was the most cited support with 59% of businesses believing it would help make their businesses more accessible.

48% suggested practical assistance, while education and training, information on providing accessible and inclusive services, and support in promotion and marketing were also identified by many respondents.

Background

In September 2024, Strategic Research and Insight (SRI) and Fáilte Ireland produced and delivered an online survey to understand the current provision of accessible and inclusive tourism in the Irish tourism sector. The survey aimed to assess the availability of accessible tourism services, understand the benefits for the industry and identify opportunities for improvements.

The survey was sent by email to tourism businesses and ran for two weeks. It received 600 responses in total.

As an open survey, respondents could choose whether or not to respond. This means the profile of respondents to the survey may not be the same as the population of businesses in the Irish tourism sector.

This report presents the results of this survey, first focussing on the current provision of accessible services among tourism businesses before covering support and guidance needs and business perceptions of inclusive and accessible tourism.

Demographics

The following tables show the numbers and percentages of businesses responding to the survey by type of business and business brand region.

Around a third of business are accommodation providers. Of these, 34% are hotels, while a similar proportion (30%) are bed and breakfast accommodation.

More than half of responses overall are from the Wild Atlantic Way brand region (52%).

Business type	Responses	% of total
Accommodation Provider	191	32%
Attraction	158	26%
Activity provider / Golf	90	15%
Food and Drink	94	16%
Venue / Event / Festival organiser	33	6%
Tourist Transport	19	3%
Other	15	3%



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Thank You

