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CHANGING DEMAND FOR BRITISH HOLIDAY TRAVEL IN IRELAND

Abstract

Britain is Ireland's main source of overseas visitors. Major changes have occurred over the last ten years in British holiday travel patterns in Ireland, including length of stay, expenditure, accommodation preferences, spatial distribution, transport mode and activity patterns. This paper investigates the factors that have generated those changes and their differential impact on tourism and hospitality operators in specific sectors and locations. The analysis of demand and supply data identifies 'triggers' that have brought about these rapid and unexpected changes in consumer behaviour, including elements within the tourism system and exogenous factors. The implications of the changes for tourism operators and for industry and government organisations are discussed, as are conceptual implications for understanding tourism development processes and, specifically, the Tourism Area Life Cycle.

Key Words: Tourism demand, trends, life cycles.

Introduction

Investigating the dynamics of growth and change in tourist destinations has been a distinctive theme of the tourism research literature for four decades. Christaller (1963) and Plog (1974) described the cyclical process of tourist destination evolution, a theme further developed by Butler (1980) who proposed a staged model of the tourist destination life cycle. Butler's model continues to exert a strong influence on research into the social, economic and environmental characteristics of tourism development processes. In fact, it has been argued recently that Butler's Tourism Area Life Cycle (TALC) is "one of the most significant contributions to studies of tourism development because of the way it provides a focal point for discussion of what leads to destination change, how destinations and their markets change and, even, what is a destination" (Hall, 2006: xv).

A key purpose of the destination life cycle model developed by Butler was "to argue the case that destinations could be regarded and analysed as a product and that they would have a life cycle" (Butler 2000:289). Most of the research utilising the model has maintained a focus on destinations as a single product, aggregating the various components of demand and supply to draw conclusions about destinations as a whole. For a recent example see Hovinen (2002). However, unlike manufactured products, tourist destinations are not inanimate objects but an amalgam of private, public and voluntary organizations acting and interacting in a dynamic, competitive environment. These actions and interactions produce a complex range of services and facilities that combine to provide a setting for tourist experiences. The tourism product is not shaped by a controlled production process but by the actions of individuals, firms and other organizations that are themselves influenced by changes in both demand and supply that collectively determine the characteristics of tourist destinations (see Prosser 1997).

The uni-dimensional simplicity of the destination life cycle model has provided a focus for criticism. Haywood (1992:353) suggested that the resort cycle model needs to be 'dynamic and open-ended', focussing on competition between corporate entities and resort locations. Similarly, Agarwal (1994) criticised the model for assuming a destination was a single product, arguing that different elements of a destination such as hotels and theme parks will each exhibit its own life cycle. Bianchi (1994:190) advocates a systems-oriented approach to account for the 'differential growth dynamics of individual resorts'. As Haywood (1998:275) concludes, "tourism within a destination may embrace several sectors and different classes of

non-competitive products, each of which displays its own unique pattern of evolution”. More recently, Moore and Whitehall (2005) demonstrate that focusing on the cumulative market trends in a destination obscures important differences between individual market segments at very different points on the life cycle, with important implications for policy and business strategy.

This paper reviews recent trends in Irish tourism demand and supply within the life cycle framework and seeks to identify factors driving change that may assist tourism operators and government agencies involved in destination planning and management, and enhance understanding of the dynamics of change in tourism systems.

Research Methods

A brief review of the characteristics of Irish tourism demand and supply is based primarily on published data collected through national statistical surveys, including visitor arrivals, expenditure, trip characteristics and visitor behaviour patterns. Key indicators are evaluated against European and international benchmarks. A more detailed analysis is undertaken of one segment of the Irish tourist market – visitors from Britain. The analysis is based on a range of data collected from industry associations and government tourism organisations. Semi-structured interviews were conducted with individual operators and industry sector representatives, structured around customised keywords (Fontana and Frey, 1998). Interview results were analysed in the context of current and recent literature on the tourism area life cycle.

The methodological approach adopted in this research is based on the principles of ‘explanation building’ proposed by Yin (1994). The approach uses an explanatory case study to test theoretical or conceptual propositions in an iterative manner.

Findings

Between 1985 and 2000, the number of overseas visitors to Ireland grew from less than two million to over six million. Although the combined effects of the Foot and Mouth scare and

terrorist attacks in the United States led to a decline in overseas visitor numbers in 2001, there was a steady recovery to a new record 7.7 million overseas visitors in 2007. As well as growth in inbound visitor numbers, the ‘Celtic Tiger’ economy created increasing rates of growth in the domestic tourism market. Domestic trips increased by 45% between 2000 and 2007 while expenditure by domestic tourists increased by 120% over the same period (Central Statistics Office, 2006 and Failte Ireland).

During this period Irish inbound and domestic tourism grew at a rate that compared favourably with major international competitors. However, two important trends have had a significant impact on some sectors of the tourism industry. First, overseas holidaymakers are staying in Ireland for shorter periods. Holiday bednights increased by 9% in the eight year period from 2000 to 2007 while the number of holiday visitors increased by 19% and the total number of overseas visitors increased by 25%. Second, tourism activity is more and more concentrated in Dublin. Between 2000 and 2007, the number of overseas visitors to Dublin increased by 32%. The rest of the country experienced an increase of 17%. More significantly, overall visitor expenditure in Dublin increased by 83% while spending increased by 32% in other parts of the country between 2000 and 2007 (see Table 1).

Table 1

Regional Distribution of Overseas Visitors and Revenue 2000 - 2007

Year	Dublin		Other	
	Visitors ('000)	Revenue (€ m)	Visitors ('000)	Revenue (€ m)
2000	3369	793	2812	1888
2001	3227	999	2613	1952
2002	3306	1072	2613	2015
2003	3445	1114	2773	2114
2004	3680	1163	2704	2071
2005	3937	1281	2826	2205
2006	4306	1374	3111	2435
2007	4449	1450	3290	2495

Source: Failte Ireland

Some of the change in regional distribution of Ireland's overseas visitors is attributable to business, event and conference travel stimulated by the booming economy, which tends to be disproportionately city based. However, when the leisure and business markets are separated, it becomes obvious that it is not just business travel that is driving tourism growth in Dublin. The proportion of Ireland's total holiday bednights spent in the Dublin region increased from 20% in 1999 to 32% in 2005. While the number of bednights spent by overseas holidaymakers in Ireland increased by 3% from 1999 to 2005, Dublin increased its share of holiday bednights by 67%. Conversely, holiday bednights spent in the rest of the country declined by 13%. In the Shannon region, overseas holiday bednights fell by 28% during this seven year period (TTC, 2006).

A key factor driving change in Irish tourism is the changing British inbound market. Britain is Ireland's main source of overseas visitors. Over 4 million British visitors stayed 17.5 million nights and spent €1.38 billion in Ireland during 2007. While the number of British visitors has grown by over 250% since 1983, the average length of stay has declined by 44% from 8.4 nights to 4.7 nights in 2007, as indicated in Table 2.

Traditionally British visitors have stayed for shorter periods and spent less than visitors from other countries during their stay in Ireland, but these trends are becoming more pronounced. In 2007, British visitors accounted for 50% of all overseas visitors to Ireland but spent only 35% of total estimated tourist expenditure and 31% of total bednights. Since 1998 the number of British bednights spent in Ireland has actually fallen by 18%, despite a 19% increase in the number of visitors.

The significance of the shorter length of stay of British visitors becomes even more apparent when the regional distribution of these bednights is taken into account. The volume of bednights spent in Ireland by British visitors has declined steadily in recent years, and a higher proportion of those nights are now spent in Dublin. Between 1995 and 2005, Dublin's share of bednights spent by British holidaymakers in Ireland increased from 14% to 33%. Conversely the share of British holiday bednights spent in locations outside Dublin fell by 12%. The changing travel characteristics of British visitors are reflected also in the type of accommodation used during their visit to Ireland. The proportion of British holiday bednights spent in Guesthouses and B&Bs declined from 32% to 18% between 2000 and 2007 while the share of nights spent in hotels increased from 20% to 28%.

Table 2
British Visitors to Ireland 1983 - 2007

Year	Expenditure (€ million)	Number of Visitors ('000)	Average Length of Stay (Nights)
1983	179	1129	8.4
1984	194	1188	8.6
1985	206	1104	8.7
1986	216	1084	8.4
1987	253	1209	8
1988	317	1465	7.5
1989	362	1668	7.6
1990	408	1786	7.6
1991	422	1729	7.9
1992	409	1758	7.7
1993	452	1887	7.1
1994	540	2087	7
1995	608	2365	6.6
1996	701	2698	6.9
1997	847	3025	6.8
1998	938	3383	6.3
1999	968	3558	5.8
2000	1042	3559	5.7
2001	1163	3462	5.6
2002	1251	3579	5.3
2003	1295	3719	5.2
2004	1253	3681	5
2005	1257	3822	4.8
2006	1373	4060	4.8
2007	1388	4032	4.7

Source: Central Statistics Office, Ireland

Again the shift in accommodation preferences is having a disproportionate impact in rural areas. According to Failte Ireland, since 2000 the number of Guesthouses has declined by 20% and the number of farmhouses and town and country homes offering tourist accommodation has fallen by 30%, while overseas visitor numbers have increased by 25%. Over 90% of premises offering Guesthouse and Bed and Breakfast accommodation are located outside Dublin.

A key factor underlying the trend to shorter length of stay and increasing concentration of British visitors in Dublin is a shift in the mode of transport used to travel to and from Ireland. Until 1987, cross-channel sea ferries were the principal mode of transport between Britain and Ireland. In 1988, the number of tourists crossing the channel by air exceeded the number crossing by sea for the first time. Since then there has been a steady increase in the number of visitors traveling by air, and the pace of change is accelerating due to the increasing number of air travelers and the decreasing number of visitors traveling by sea. Since 1998, the number of visitors traveling from Britain by sea has declined by 44% while the number traveling by air has increased by 52% over the same period. In 2006, there were four times more air travelers than sea travelers (see Table 3).

Table 3
Mode of Travel from Britain to Ireland 1998 - 2006

Year	Air Cross-Channel (‘000)	Sea Cross-Channel (‘000)	Ratio Air:Sea
1998	2570	1753	1.5:1
1999	2836	1677	1.7:1
2000	3047	1518	2:1
2001	2969	1313	2.3:1
2002	3073	1335	2.3:1
2003	3253	1262	2.6:1
2004	3413	1192	2.9:1
2005	3595	1085	3.3:1
2006	3900	983	4.0:1

Source: Central Statistics Office, Ireland

The shift in mode of travel between Britain and Ireland has had an impact on other dimensions of travel behaviour. As the number of visitors crossing by sea ferry has declined, so the proportion of holidaymakers travelling with their own car has declined - from 61% in 1995 to 12% in 2006. Consequently, travel patterns within Ireland have changed, as discussed above. Instead of bringing their car on the ferry and taking an extended break to explore the Irish countryside and the activities it has to offer, an increasing proportion of British visitors now catch a cheap flight to Dublin for a short break. As a result, participation by British visitors in active outdoor pursuits such as hiking / hill walking, golf, fishing, cycling and equestrian activities declined by as much as 90% between 1995 and 2005.

In summary, strong overall growth in Irish inbound and domestic tourism is obscuring dramatic changes taking place in tourism demand and supply. Data presented above indicate two key trends. First, overseas holidaymakers are staying for shorter periods in Ireland. Second, tourism activity is more and more concentrated in Dublin. In both cases these trends are linked to changes in the inbound British market, including: declining length of stay; a decline in per capita expenditure; a decline in the proportion of leisure travelers; changes in travel behaviour patterns during the time spent in Ireland; changes in accommodation preferences; and, changes in the nature of activities pursued by leisure travelers. A rapid shift from sea to air travel, particularly over the last decade, appears to be a key factor underlying the trend to shorter length of stay and increasing concentration of tourist activity in Dublin. These trends pose significant challenges for many tourism operators, and for those industry and government bodies responsible for destination management and marketing.

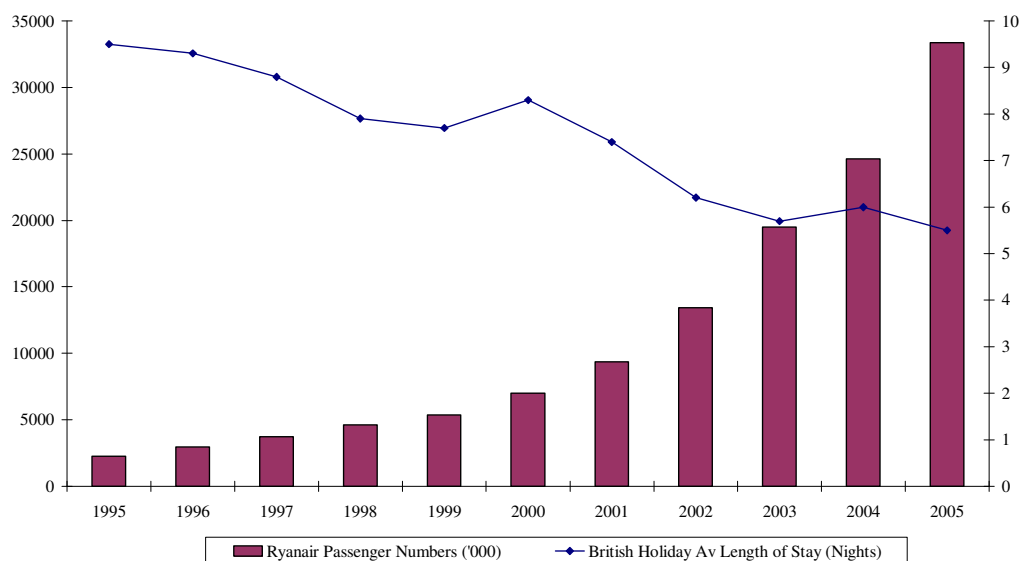
Discussion

Broadly, two sets of considerations arise from the analysis above. First, anyone involved in or affected by the tourism industry will be anxious to understand what is driving the rapid change in the British market, and what if anything can be done about it. Second, what are the implications for our understanding of tourism development processes and the dynamic interaction of markets and products that collectively determine overall trends in demand and supply?

Why are these rapid changes occurring in the British inbound market and what, if anything, can or should be done about it? As suggested above, the shift from sea to air travel over the last decade may be the key. If so, has there been a fundamental shift in British outbound travel behaviour or are specific factors influencing travel to Ireland? There are a combination of international and domestic factors that may explain changes in the British inbound market. Internationally, for example, the growth of low cost airlines, trends to shorter more frequent leisure trips and development of new competitive destinations in eastern Europe and elsewhere may be having an impact on British leisure travel to Ireland. Domestically, rising consumer prices are having a significant impact on Ireland's destination competitiveness and may have had an impact on market perceptions of the Irish product.

The growth of low cost carriers has fundamentally changed the relative cost of air and sea transport between Britain and Ireland. Cheaper flights have stimulated demand, encouraging more people to travel more often by air. The impact of low cost airlines on the travel behaviour patterns of British visitors to Ireland is illustrated by a comparison of the performance of Ryanair and the length of stay of British visitors over the last decade. Figure 1 illustrates how growth in Ryanair's passenger numbers has coincided with a decline in length of stay of British holiday makers in Ireland.

Figure 1
Ryanair Passenger Numbers and British Holidaymakers' Average Length of Stay in Ireland 1995 - 2005



It is relevant to consider whether the changes experienced in Ireland reflect broader changes in European travel trends and the British outbound market. There is evidence that the success of low cost carriers has encouraged an increase in air passenger volumes throughout Europe due to a combination of more frequent trips, substituting air for alternative transport modes and stimulating new demand (see Graham, 2006). For example, total passengers transported by air in the EU25 rose by 8.5% in 2005 following a rise of 8.8% in 2004 (Eurostat, 2007). One factor contributing to this growth was the rapid development taking place in Eastern Europe.

The growth in new destinations, particularly in Eastern Europe, may be a factor affecting the British outbound market. Certainly Ireland has lost the competitive advantage it once had in low fare air access when Ryanair pioneered cheap cross-channel flights. British consumers can now fly to a diverse range of European destinations using low cost carriers. Despite the development of new destinations and the wider availability of low cost flights, international passenger statistics to and from UK airports suggest Ireland is not losing out to other destinations. Between 1995 and 2005, UK passenger numbers to and from Ireland grew by 96% compared to 83% for the EU25 as a whole.

The issue for Ireland is not loss of visitor numbers but changing visitor behaviour patterns that are more rapid and more pronounced than changes in other markets. For example, the shift from sea travel to air travel by British visitors to Ireland reflects a more general increase in air travel, although the overall UK trend is much less dramatic than the change in cross-channel travel patterns. For example, between 1990 and 2004 the proportion of British visitors to Ireland travelling by air increased by 30% compared with an overall increase of 18% in air travel by UK holiday makers. A further indication of the unusually rapid change in the British inbound market to Ireland is length of stay. There is a general UK trend to shorter international holiday trips, from an average 10.9 days in 1995 to 10.1 days in 2005, a change of 7% (Office for National Statistics, 2006). During this same period, the average length of stay of British holiday makers in Ireland dropped from 7.3 nights to 4.8 nights, a change of 34%.

Based on the figures presented above, it seems that changing mobility patterns of British visitors to Ireland do reflect broader changes occurring throughout Europe with respect to

increasing air travel and shorter length of stay. The data also indicate that the changes experienced in Ireland are more rapid and more significant than changes in other markets. The disproportionate impact on Ireland suggests domestic factors may be contributing to the change process. A key domestic factor is the increasing cost of holidaying in Ireland.

The findings of an annual survey of overseas travellers conducted in Ireland indicate that in 2000 78% of British visitors rated their holiday in Ireland as very good or good value for money. In 2005, this figure had dropped to 36%. Over the same period, the proportion of British visitors who rated their Irish holiday as poor or very poor value for money increased from 4% to 23% (Failte Ireland, nd). A rapid decline in the perceived 'value for money' of an Irish holiday would help to explain declining length of stay and per capita expenditure and changes in the nature of activities pursued by British leisure travelers in Ireland.

The changes in the British market have been sudden and unexpected. Dramatic change has wide-ranging implications for tourism operators, communities, and for the industry and government organisations that represent tourism interests. For national and regional tourism organisations, the importance of effective industry forecasting methods is clear. Agencies need to do more than simple trend extrapolation at national level to anticipate the type of changes affecting Irish operators in rural and regional locations. At aggregated national level forecasts of inbound demand seem remarkably accurate, yet for many operators in specific sectors and locations, these aggregate forecasts conceal fundamental changes with the potential for catastrophic impacts on individuals and communities.

The research has implications also for the future business strategy of accommodation operators and other service providers, and the industry and government bodies that represent them. Changing tourist behaviour patterns, tariffs that have not kept pace with inflation, costs incurred through improving standards of service and facilities to cater for increasingly discerning consumers, and competition from new entrants to the market, have combined to force many operators from the industry. As the size of the accommodation sector in rural and regional locations contracts, its influence on government and industry organisations declines, as does its profile and visibility in an increasingly crowded and competitive market place. There is likely to be a continued decline in the number and viability of traditional Guesthouse, B&B, and caravan and camping park operators catering for domestic and international visitors. This decline is putting pressure on all parties to develop effective

responses to reverse the changes or at least ameliorate their impact on tourism operators. It also raises the question of what can be learned from this experience that might enhance our understanding of tourism change processes and, perhaps, help to anticipate any similar changes in the future.

On balance, the findings of this research lend support to the view that understanding the dynamics of change in tourism systems requires that more attention be given to the conflict and competition that may be masked by apparently buoyant national indicators of economic and tourism industry growth. Further research is needed to identify factors that are the source of this conflict and competition paying due attention to the critical role played by factors beyond tourism's conventional spatial and sectoral boundaries.

In his original description of the model, Butler (1980) identified a series of stages of tourist area evolution – slow initial growth (*exploration* and *involvement*) followed by more rapid growth (*development*) that will eventually stabilize (*consolidation* and *stagnation*) before the attractiveness of the area is compromised (*decline*). In his paper, Butler highlighted transitional changes in both demand and supply that would indicate the evolution of a destination from one stage of the model to the next. These included the transition from informal to formal provision of tourist services and facilities, the transition from local to outside control of development, and the transition from independent travellers attracted by features of the natural and cultural environment to mass tourists attracted by a destination image divorced from its environment.

Two observations regarding the constituent elements of the TALC model seem relevant in the context of the analysis of contemporary Irish trends presented above. First, Ireland as a destination has multiple tourism markets and multiple industry sectors providing services to visitors in different locations. These various markets, suppliers and locations may be at different points of the cycle. For example, Dublin is experiencing rapid growth while some rural locations are in decline. Ryanair is experiencing rapid growth while B&B operators are in crisis. The second observation is that the transitional changes identified by Butler to indicate evolution of a destination from one stage of the model to the next do not appear very relevant in a contemporary Irish context.

More recently, Butler has identified eight essential elements of the TALC and argues “that in some cases the key elements, and thus the overall validity of the model, have been overlooked because of a focus on detail” (Butler, 2000: 289). The eight essential elements of the model are: dynamism or change; process; capacity or limits to growth; triggers; management; long-term viewpoint; spatial dimension; and, universal applicability (Butler, 2000; 2006). The fourth of these elements – triggers – refers to “factors which bring about change in the destination ... They were envisaged as including innovations in areas such as transportation, and in marketing, as well as initiatives at the local and subsequently regional, national and international levels by developers” (Butler 2000: 290).

Butler (2000; 2006) has argued that in the original formulation of the TALC, triggers were not afforded the emphasis they should have received. This observation is borne out by Lagiewski’s (2006) survey of major works relevant to the TALC which classified forty nine major tourism life cycle studies. According to Lagiewski, not one of these studies identified triggers as the aspect of the model that was tested, or as the special emphasis of the research.

Identifying ‘triggers’ is fundamental to understanding the change process in tourist destinations. In the absence of an understanding of factors that bring about change there can be no informed intervention by destination planners or managers working towards a vision of the future for tourists, tourism enterprises and host communities. It follows, therefore, that an improved understanding of triggers will have important implications both for conceptual frameworks for the study of tourism destinations and for guiding the actions of those individuals and agencies that wish to influence the direction, rate or scale of destination development. This must be an important priority for future research.

Conclusions

There has been a major shift in the travel behaviour patterns of Ireland’s principal inbound market that has been both rapid and unexpected. Major changes in the British market in recent years include: declining length of stay and per capita expenditure; changing accommodation preferences and spatial distribution of visitors within Ireland; a decline in the proportion of leisure travellers; changes in mode of transport to and from Ireland; and, changes in the nature of activities pursued by British leisure travellers in Ireland.

The results of this research indicate that destination change in rural Ireland is the outcome of changes in the British inbound market. Changing mobility patterns of British visitors to Ireland reflect broader changes occurring throughout Europe with respect to increasing air travel and shorter length of stay, but the changes experienced in Ireland are more rapid and more significant than changes in other markets. While growth of the low cost airline sector is having an impact on Ireland's inbound British market, the available evidence suggests that rising prices and diminishing value for money are also contributing to the change process.

The analysis identifies a number of conceptual implications for the Tourism Area Life Cycle and, more broadly, tourism change and development processes. These issues include the need to look beyond cumulative market trends in a destination and consider differences between individual market segments and supply sectors at different points on the life cycle, and the importance of identifying those factors that trigger change in the destination.

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