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Recent Trends in Global and Irish Tourism

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Abstract: 2001 will long be remembered as one of the most difficult years for tourism in Ireland. The outbreak of Food and Mouth disease in the first half of the year was seen as a major blow to the industry, with many businesses suffering from the resultant restrictions on travel. These problems were further increased by the global effects of the economic slow-down in the USA. As the sector began to recover and was shaping up for a healthy Autumn, the terrorist attacks of September 11 devastated the industry globally, with knock–on effects which are only now beginning to be assessed. In light of these three impacts, this article examines the major global trends of tourism and focuses particularly on the world's largest business in Ireland.

Introduction

There are many reasons why tourism has become an important topic for geographical investigation, not least being its global importance as both an activity and an industry. By the mid 1990s the World Travel and Tourism Council estimated that tourism was the world's largest industry, accounting globally for approximately 10% of the world's workforce and approximately 10% of global gross domestic product (Cooper et al, 1998: 1-2).

Reasons for Engaging in Tourism

There are a number of reasons why an individual goes on holidays, these include both 'push' and 'pull' factors and vary according to the individual involved. Table 1 identifies the main categories of traveller used by researchers of tourism.

Table 1 : Classification of Tourists

Purpose of Arrival	%
Leisure Recreation Holidays	62.1
Business / Professional	17.9
Visiting Friends and Relatives (VFR) / Health / Religion / Other	20.0
	WTO, 2000

Each of these groups will behave differently. Thus, a business traveller may be interested in a convention or a meeting, a person travelling for pleasure may partake in some form of recreation, sightseeing or dining out, an individual who travels to visit friends or relatives (VFR) may engage in socialising or dining in, while others may travel for shopping, physical entertainment or urban entertainment. In examining motivations for travel, it is worth remembering that an individual will travel for many different reasons on a single trip. Ryan (1991) presents the following list (Table 2) which is useful in examining motivations for travel.

Table 2 : Motivations for Tourism

A desire to escape from a mundane environment
The pursuit of relaxation and recuperation functions
An opportunity for play
The strengthening of family bonds
Prestige, since different destinations can enable one to gain social enhancement among peers
Social interaction
Educational opportunities
Wish fulfilment
Shopping
Ryan, 1991: 29

Components of Tourism

Thus, for a location to capitalize from tourism these personal motivations must be fulfilled through the provision of a tourism product. The components which make up this product may be divided into primary, secondary and additional elements (Table 3). Both the natural and manmade landscape form central resources in the product, with every location possessing a different balance of the various elements.

Table 3 : Elements of the Tourism Industry Natural and Cultural

Primary Elements
Activity Resources: **Cultural Facilities:** concert halls / cinemas / exhibitions / museums and art galleries / theatres **Sport Facilities:** indoor and outdoor / participation and viewing. **Amusement Facilities:** bingo halls / casinos festivities / night clubs / organised events / health resorts / amusement and recreation parks / zoos and oceanariums / cuisine
Leisure Resources: **Physical Characteristics:** climate / outstanding panoramas / areas of natural beauty / national parks and green areas / wildlife / flora and fauna / sites and areas of archaeological interest / historic or interesting buildings, monuments and statues / places of historical interest / ecclesiastical buildings / harbours historical street pattern / parks / water – canals, coastal and river / unique attractions unavailable elsewhere.

Socio-cultural Features: folklore / modern culture / friendliness / language / festivals / art and handicrafts / music / religion / liveliness and ambiance of the place / native customs, life and costumes / political and educational institutions / security
Secondary Elements
Hotels / catering / markets / shopping
Additional Elements
Accessibility / parking / tourist facilities: information offices / signposts, guides, maps, leaflets.
Based primarily on Hall & Page, 2001, 101 and Shaw & Williams, 2002, 112

Impacts of Tourism

This range of elements illustrates the diversity of the tourism business. In trying to assess the industry it is important to heed the words of Pearce: 'Tourism is . . . a multi-faceted activity and a geographically complex one' (1989, 2). One must be aware therefore, that tourism involves more than simply the transfer of people and money (which are the conventional indicators of development), but also, the transfer of consumption patterns, values and lifestyles which interpenetrate the societies within which the industry occurs (Shaw & Williams, 2002). In an effort to evaluate how tourism can influence or shape an area, Table 4 presents a selection of both its positive and negative impacts. These include economic, socio-cultural, psychological, political / administrative and environmental impacts.

Table 4 : Positive and Negative Impacts of Tourism
Positive Economic Impacts
• Increased expenditure • Employment creation • Increased labour supply • Increased standard of living • Increased investment • Increased awareness of a region • Increased knowledge re- investment potential • Creation of new facilities attractions and infrastructure • Increased accessibility
Negative Economic Impacts
• Localised inflation • Real estate speculation • Failure to attract tourists • Undesirable opportunity costs – i.e. funds for alternative developments re-diverted • Capital outflow • Inadequate estimates of costs of tourism • Acquisition of poor reputation due to inadequate facilities, poor practice or inflated prices • Impact on existing enterprise – competition for workforce and government assistance
Positive Socio-Cultural Impacts
• Increase in permanent level of local interest and participation in types of activity associated with event • Strengthening of regional values and traditions
Negative Socio-Cultural Impacts
• Commercialisation of activities which may be personal or private • Modification of nature of event or activity to accommodate tourism • Potential increase in crime • Changes in community structure • Social dislocation
Positive Psychological Impacts
• Increased local pride and community spirit • Increased awareness of non-local perceptions
Negative Psychological Impacts
• Tendency towards defensive attitudes concerning host regions • High possibility of misunderstandings leading to varying degrees of host/visitor hostility
Positive Political / Administrative Impacts
• Enhanced international recognition of region and values • Development of skills among planners
Negative Political / Administrative Impacts
• Economic exploitation of local population to satisfy ambitions of political elite • Distortion of true nature of events to reflect values of political system • Failure to cope • Inability to achieve aims • Increase in administrative costs • Use of tourism to legitimise unpopular decisions • Legitimating ideology of local elite
Positive Environmental Impacts
• Development of new facilities • Improvement of local infrastructure • Conservation of heritage • Visitor management strategies
Negative Environmental Impacts
• Environmental damage • Changes in natural processes • Architectural pollution • Destruction of heritage • Overcrowding • Changed feeding and breeding habits of wildlife
Source: After Hall, C.M. and Page, S.J. (1999)

Despite the recognition in literature of a broad range of elements, the focus of official tourism reports is extremely narrow, constantly emphasising a small range of facts which are predominantly economic. This probably arises from government interest in balancing the economy, and is reinforced by the world Tourism Organisation (WTO) who stress the following 'Key Benefits' of tourism:

- Export Earnings
- Employment
- Rural Opportunities
- Infrastructure Investment
- Tax Revenues
- Gross Domestic Product (WTO, 2002c)

For the purpose of international comparability, the World Tourism Organisation suggests that tourism organisations should consider a number of basic 'indicators' which assist in calculating the above 'benefits'. For inbound, outbound and domestic tourists countries are advised to record:

- Overnight stays and length of stay
- Expenditure in the country of reference
- Hotels - number of rooms / total capacity.
- Occupancy rate (may refer either to rooms or beds)

Therefore, despite the multitude of motivations, elements and impacts outlined above, national organisations predominantly focus on quantifiable indicators such as numbers of tourists and money. Using these data, the second section of this article will focus on a statistical examination of global tourism.

Global Trends in Tourism

The phenomenal growth in global tourism throughout the latter half of the twentieth century can be clearly seen in the following table, which outlines growth in both numbers and revenue from 1950 to 2000. Many factors have added to this growth, including the introduction of paid holidays in the 1930s, real wage increases which improved living conditions and thereby luxury spend on items such as holidays, promotion of holidays in media by transport operators and the tourism industry and the popular expectation that annual holidays are now an attainable right and part of the normal lifestyle (Williams, 2000).

Table 5 : International Arrivals 1950-2000

Year	Tourists (Million)	Revenue ($US billion)
1950	25	2.1
1960	69	6.9
1970	165	17.9
1980	285	105.3
1990	457	263.6
2000	699	476.0

Source: WTO, 1995, 2002

Tourism Arrivals & Revenue*

An examination of where tourism occurs illustrates the changing nature of the industry. All regions of the world received more tourists in 2000 than previous years, with by far the biggest growth rates experienced in East Asia and the Pacific (+14.7 percent). While Europe is still the main focus of global tourism, receiving 57.7 percent of all international arrivals in 2000, this has dwindled from the 1960 situation where 72.5 percent of all international visitors travelling to Europe. East Asia and the Pacific, now accounts for 16.0 percent of international travellers, due to its high growth rates.

Table 6 : Share of Visitor Arrivals by Region

Region	1960	1970	1980	1990	2000
Americas	24.1	23.0	21.3	20.5	18.5
Europe¶	72.5	70.5	66.0	62.4	57.7
Middle East	1.0	1.4	2.1	1.6	2.9
South Asia	0.3	0.6	0.8	0.7	0.9
East Asia / Pacific	1.0	3.0	7.3	11.7	16.0

Source: WTO, 2002

Despite these trends, European dominance is still evident when the top fifteen global tourism destinations are listed in order (Table 7). The most popular destination is France, with Spain and Italy third and fourth in ranking. The lure of the Mediterranean region (which also includes Greece) is clear, but other regions in Europe are also prominent: the UK, Germany, Austria, Poland and Hungary are also in the top fifteen. Overall, a distinct spatial pattern may be observed in international tourism. Shaw and Williams (2002) present three ways in which this pattern is manifest:

- **Polarisation** – flows of tourists are primarily between more developed countries or from these to less-developed countries. The three cores being Europe (centred on EU), North America (USA) and East Asia (Japan)

* Due to the complexity of global tourism changes with the atrocities of September 11 2001, and the shortage of definitive data, this analysis uses data for 2000. The change to global tourism in 2001 will be given particular attention later.

¶ The WTO uses a very broad definition of 'Europe' including 53 countries stretching as far east as the Russian Federation, and the Former USSR. In 2000, 70% of European arrivals were to EU countries.

- **Macro-regionalisation** – flows are primarily contained within regions. Thus, Caribbean tourism is dominated by America, East Asian tourism is dominated by Japan, while European tourism is mainly between countries within the region.
- **European dominance** – The dominance of Europe continues, but is in relative decline. Both European and North American tourism are still experiencing growth, but the 'discovery' of Asian and African destinations by tourists from the developed world and the rising incomes in these areas has resulted in spectacular growth.

The rank order of destinations has stayed relatively similar over the last decade, with the opening of the Russian and Chinese markets resulting in the biggest change.

Table 7 : Top 15 Tourism Destinations, 2000

International Tourist Arrivals		% change 2000/1999
Destination	(Millions)	
France	75.5	3.4
United States	50.9	4.9
Spain	48.2	3.0
Italy	41.2	12.8
China	31.2	15.5
U.K.	25.2	-0.8
Russian Fed.	21.2	14.5
Mexico	20.6	8.4
Canada	20.4	4.9
Germany	19.0	10.9
Austria	18.0	2.9
Poland	17.4	-3.1
Hungary	15.6	8.1
Hong Kong(China)	13.1	15.3
Greece	12.5	2.8

Source: WTO, 2002

In 2000, 59 countries registered over US$1 billion in international receipts. As can be seen in the following top fifteen earners (Table 8) the clear leader of this group is the United States. This is followed by Spain, France and Italy, again illustrating the attraction of the Mediterranean (Greece is also included in the top 15) and when one considers the next three destinations (UK, Germany and Austria the overall dominance of European destinations becomes evident.

Table 8 : Top 15 Tourism Earners, 2000

Destination	International Tourism Receipts (US$ Bln)
United States	85.2
Spain	31.0
France	29.9
Italy	27.4
U.K.	19.5
Germany	17.8
Austria	11.4
Greece	9.2
China	16.2
Canada	10.8
Australia	8.4
Mexico	8.3
Hong Kong(China)	7.9
Turkey	7.6
Russian Federation	7.5

Source: WTO, 2002

World-wide Spenders

To complete this analysis the top fifteen tourism generation areas are illustrated in Table 9. This group is also dominated by the model presented above, the overall pattern displaying polarisation, macro-regionalisation and the dominance of Europe. The top world spenders are the stronger economies of North America, the Pacific Rim and Europe (Table 9). In many of the countries, a reciprocal pattern of spending and receipts is visible, however an imbalance of spending over receipts may be observed in the Netherlands, Belgium/Lux, Sweden the Republic of Korea and Switzerland.

Table 9 : Top 15 Tourism Spenders, 2000	
Origin	**International Tourism Spend (US$ Bln)**
United States	65.0
Germany	47.6
U.K.	36.6
Japan	31.5
France	17.2
Italy	15.5
Canada	12.4
Netherlands *	11.8
China	10.9§
Belgium/Lux *	10.1§
Austria	9.3
Sweden*	7.6§
Russian Federation	7.4§
Republic of Korea*	6.4
Switzerland*	6.3
* = Country not listed in top 15 earners § = Expenditure in 1999 – 2000 figure not available	Source: WTO, 2002

Regional Focus of Tourism

The global pattern of regionalisation may be clearly observed by examining the pattern of international tourist arrivals in Europe (Table 10). 84.1% of all international arrivals in Europe are generated within the region. This means that the region is both the origin and destination for some of the main global tourism flows. A similar pattern exists between the USA and Canada (and to a lesser equal extend USA and Mexico) which accounts for two of the three largest international tourist flows (Shaw and Williams, 2002).

Table 10 : Origin of Tourists arriving to European Destinations, 2000	
Origin	**% of European Tourists**
Europe	84.1
Americas	7.4
East Asia / Pacific	3.8
Middle East	0.5
Africa	0.8
S. Asia	0.4
	Source: WTO, 2002

Mode of Travel

The pattern of international arrivals further reinforces this regional phenomenon with road and rail accounting for large proportions of international travel (Table 11). Thus, large proportions of international tourists originate proximate to their place of destination. In order to illustrate this pattern the figures for Ireland are presented. The absence of land connection results in high dependency on air travel. Closer investigation of these data reveals that 56 percent of all international travellers to Ireland originate in Britain, thus, patterns of proximity are evident.

Table 11 : Patterns in International Travel		
	International Arrivals (%)	**Arrivals to Ireland (%)**
Air	43.7	72
Sea	7.8	25
Rail	7.0	3*
Road	41.4	
*Via N. Ireland		WTO, 2000; Bord Fáilte 2002

Irish Tourism

Within the context of this global framework, the following section focuses on Irish tourism, with an emphasis on recent trends and issues.

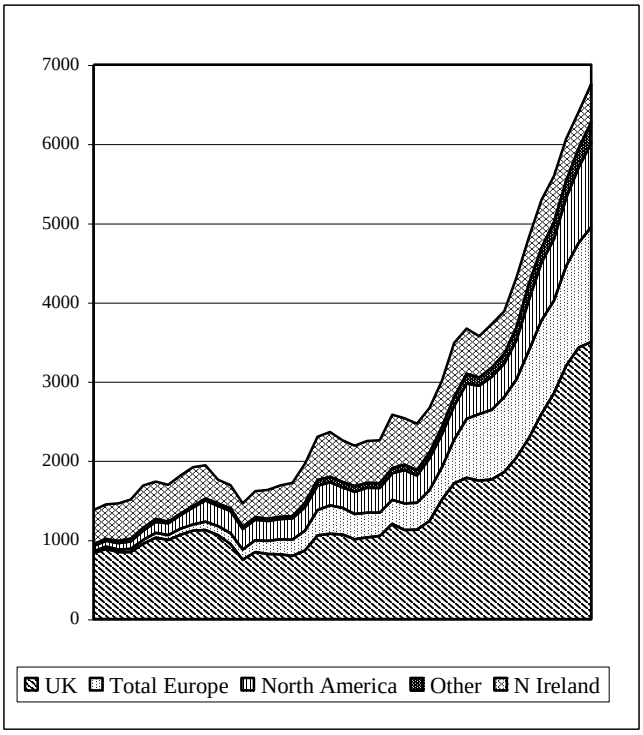
Recent Growth of Irish Tourism

Tourism growth in Ireland has been impressive in the last ten years. Since the late eighties, developments such as the provision of funding through *Operational Programmes*, have transformed the industry from a stagnant to a vibrant sector of the economy. EU structural funds, tax incentives and private investment have poured £3.9 billion (€4.9 billion) into infrastructure, while Irish culture has taken central stage with icons such as 'Riverdance', 'U2', Seamus Heaney and music/arts festivals focusing attention on the island. The emergence of low-cost flights and improved access via ferry services from Britain and Europe also added to the growth rate (Barrie, 2001). Resulting from this, between 1990 and 2000 overseas tourist visits to Ireland grew by 103%, with Irish growth rates in most cases surpassing global increases (Bord Fáilte, 2001). This means that Ireland now attracts over one and a half times its own population in tourists.

Domestic trips account for 51 percent of tourism visits and 23 percent of total tourism revenue, but overseas visitors are more free-spending and thus are more important financially. Britain, accounting for 56 percent of overseas visitors is the most important source of tourists to Ireland, reflecting close cultural links, ease of travel and migration of Irish emigrants visiting friends or relatives (Figure 1). The USA is second most important accounting for 15 percent of visitors followed by European

destinations such as Germany with 5 percent (Bord Failte, 2001)

Figure 1 : Out of State Visits to Ireland (1960-2000)



Source: Irish tourism statistics for 1960-1999, received from research dept. of Bord Fáilte; Bord Fáilte, 2001

Strengths of Irish Tourism

The recent growth of Irish tourism is built on a number of foundations. According to McDaid, '[the] legendary friendliness and spontaneity of our people and our relatively clean environment continue to form the bedrock of Irish tourism' (2002). The most commonly proclaimed strengths of Irish tourism are:

- Our friendliness and hospitality with an emphasis on the quality, level and depth of contact with the people
- A strong folk and cultural tradition
- One of the cleanest environments in Europe, with a low population density and unhurried pace of life
- A distinctive archaeological and cultural heritage, situated within beautiful landscapes.
- Widely distributed accommodation base.
- World-wide ethnic market of people of Irish descent

Over the last decade, these strengths have been built upon with the provision of a wide range of quality facilities, including:

- Sporting and recreational facilities and events (such as golf, angling, walking, cycling, equestrian, cultural and heritage)
- High standard accommodation, food and hospitality facilities (Government of Ireland, 1989; Department of Tourism Sport and Recreation, 2002)

Recent attitudinal surveys, however, sound a warning, showing that scenery has taken over from the friendliness of the people as Ireland's primary selling point. While this is a positive affirmation of the unspoiled environment it is worrying for the future of Ireland's 'Fáilte' (Needham, 2001).

Current State of Irish Tourism

Looking at Irish tourism statistics one can see the influence of the World Tourism Organisation's statistical recommendations as discussed above. Bord Fáilte present the following 'highlights' for 2000:

- Irish Tourism is a €4.8 billion industry. Out-**of-state tourist expenditure**, including spending by visitors from Northern Ireland, amounted to €2.9 billion with a further expenditure of €0.8 billion by overseas visitors on fares to Irish carriers. In addition, domestic tourism expenditure amounted to €1.1 billion.
- **Government earned** €2.0 billion through taxation of tourism expenditure. €1.6 billion of this from foreign tourism. For every euro spent by out-of-state tourists, 57c ends up with government (VAT, excise, PAYE, etc.)
- €3.7 billion worth of exported goods and services can be attributed to tourism. This accounts for 3.8% of **exports** and 4.2% of **GNP**. These goods have a very low import content in comparison with other exports.
- Tourism supported 145,000 **jobs** (or job equivalents). This equates to 8.7% of the workforce or one in 12 jobs.
- Over 40 **jobs** are supported for every million euro of out-of-state tourism expenditure and 28 jobs for every million euro of domestic tourism expenditure.
- Tourism is characterised by consumption taking place where the service is available. Activity is particularly concentrated in areas which lack an intensive industry base, it is credited with having a significant **regional** distributive effect (Bord Fáilte, 2001).

The only 'highlight' of 2000 which does not focus on income or numbers is the last point – the regional importance of tourism. However, one of the main benefits of regional distribution is the use of tourism revenue as an alternative to industry.

Distribution of Irish Tourism

Two goals which have difficult to attain the seasonal and spatial spread of tourism.

The seasonality problem refers to the focus of tourism in the months of May to September. The Second *Operational Programme for Tourism 1994-1999*, aimed at reducing peak season tourism to 25 percent of international arrivals by 1999, and this has almost been achieved. Off-peak tourism had been the main positive area with 44 percent achieved in 2000 – surpassing the target of 41 percent by 1999 (Table 12).

Table 12 : Seasonal Distribution of Overseas Tourists

	Peak (Jul /Aug)	Shoulder (May / Jun / Sept)	Off Peak
1993	**30**	**30**	**40**
1998	**28**	**29**	**43**
2000	**26**	**29**	**44**

Source: Government of Ireland, 1999; Bórd Failte 2001

The oft-acclaimed regional distribution of tourism income is still heavily weighted by three main areas, Dublin the south-west and Galway-Connemara (Needham, 2001). The following table (Table 13) demonstrates that between 1986 and 1996, the change in regional distribution of tourism favoured the already advantaged *South and East* region, with the *Borders Midlands and West* region slipping further behind.

The emergence of Dublin as 'one of the most exciting cities in Europe renowned for a mix of ancient and modern culture, heritage, pubs and restaurants and nightlife' (Barrie, 2001: 23) has undoubtedly played a major part in this national distribution, with 54 percent of all overseas tourists visiting the capital city.

Table 13 : Regional Distribution of Overseas Tourism Revenue

Year	£m / % of total		Nation	National Growth (Revenue)
	S&E Region	BMW Region		
1986	321 74%	115 26%	436	
1991	646 75%	210 25%	856	86-91: 96.3%
1996	1,114 77%	337 23%	1,451	91-96 : 69.5%

Source: Government of Ireland, 1999

Having examined global and Irish tourism up to 2000, the following sections examine recent trends in global and Irish tourism, with particular emphasis on the impacts of the September 11 terrorist attacks.

2001 – Global Tourism in Crisis

In the last fifty years, tourism has been adversely affected by many different problems - natural disasters, serious social conflicts, wars, economic crises and terrorism. What has been clearly proven is that tourism has an extraordinary resistance and an ability unmatched by any other industry to overcome crises. While the situation is not expected to improve rapidly in the short-term, in the absence of new major external factors, a return of consumer confidence is expected to begin throughout 2002. The WTO state that the tourism industry should emerge from this crisis fitter, undeniably leaner, but immeasurably stronger. (WTO, 2002b)

Even before September 11, there was 'visible cooling in growth of tourism emanating from countries like Germany, Japan and USA. This was due to a couple of reasons, including economic slow-down and the fact that 2000 had been an exceptional year for tourism, with millennium events boosting numbers. Thus, growth in world-wide arrivals for the first eight months of 2001 stood at 3.0 percent, while the average growth over the same period for the previous ten years was 4.3 percent.

The four months following the disaster resulted in a drop of 11% in world-wide arrivals, with decreases in every global region. The greatest drop was in the Middle East (-30%), the Americas (-24%) and South Asia (-24%). These areas reflect the three types of destination which suffered the most; destinations a long distance from their main

generating markets, countries highly dependent on the USA for tourists, and countries of the Moslem world respectively.

It would appear that by December the impacts were lessening, with many tourists substituting domestic trips for international travel, thus these statistics may not be as bad as they seem. Current thought is that the industry will return to its growth cycle by the second half of 2002 as business travel resumes and consumer confidence returns (WTO, 2002d).

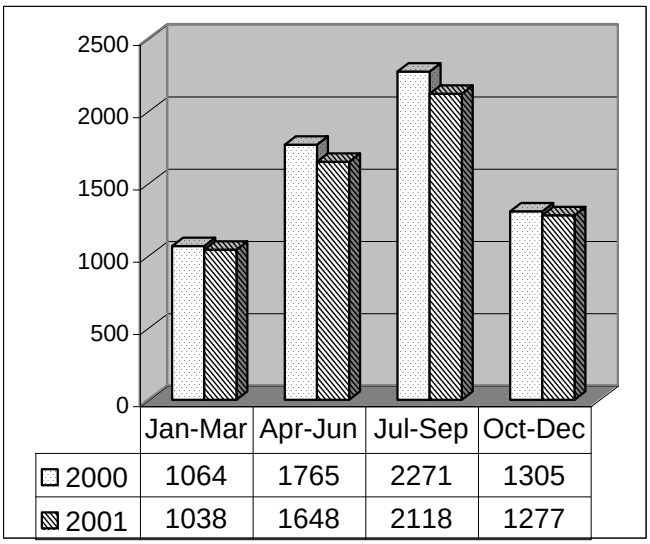
Irish Tourism 2001

2001 represents the first decline in Irish tourist numbers since 1991 (see Figure 1) when the influence of the Gulf War resulted in a fall of 2 percent. Two major events influenced Ireland in 2001, Foot and Mouth and the terrorist attacks of September 11.

Foot and Mouth

The single outbreak of foot-and-mouth disease in the Republic is estimated to have cost the Exchequer over €1 billion and the tourism sector €200 million (MacConnell, 2002). Interestingly, due to the nature of the Irish tourism industry, it would appear that events in the earlier part of the year had a greater impact on the industry than the September 11 atrocity. As can be seen in Figure 2, the total numbers for the second and third quarters of the year were down by 6.6 and 6.7 percent respectively, while the final four months of the year only showed a drop of 2.1 percent. While this graph does not detail the various internal trends, it illustrates how well the Irish tourism business has fared compared with national and international forecasts. As can be seen in Table 15, in 2001, tourism numbers from all but the British market were considerably down on the 2000 figures.

Figure 2 : Comparison of total tourism numbers (000s) per quarter 2000-2001



Source: CSO, 2002

Mirroring global trends, long-haul flights from North America to Ireland were down by 12.5 percent throughout the entire year, with a major drop of 24.5 percent in the last quarter (Table 14). The British market which suffered badly in the first half of the year due to Foot and Mouth restrictions, rallied considerably due to aggressive marketing, competitively priced fares, and proximity. The rallying of this market has given major support to the overall industry, substituting the highly lucrative American market which sustains much of the shoulder season business. However, in a quarter when Bord Fáilte had predicted a 10 to 19 percent drop in numbers, these figures are a major tribute to the Autumn campaigning by the National Tourist Board and industry (Bord Fáilte, 2001b).

Table 14 : Change in Overseas Markets per Quarter 2000-2001

Area of Residence	% Change Per Quarter				Total %
	1st Q	2nd Q	3rd Q	4th Q	
Britain	-7.5	-9.3	-0.7	+7.5	-2.6
Other Europe	+8.0	-2.0	-12.5	-12.8	-7.0
USA & Can.	+3.2	-7.7	-16.3	-24.5	-12.5
Other Areas	+13.2	+10.1	-4.1	-9.1	1.2
Total	-2.4	-6.6	-6.7	-2.1	-5.1

Source: CSO, 2002

Surprisingly in a year with such overall upset, despite the fall in numbers, there was in fact an increase in earnings for each of the four quarters (+6.2, +2.5, +7.3 and +5.3 percent respectively)

An interesting trend in overseas visits in the last quarter of 2001 is increased occupancy in both

hotels (+3.1%) and rented houses / apartments (+8.4%) over the same period in 2000. This follows global trends, with international tourists, most likely British in this case, deciding to travel closer to home, i.e. Ireland, and staying longer. Again, cheap deals and competitive transport have assisted these numbers (CSO, 2002).

The main lesson from both of these crises is the dependency of Irish tourism on the British and American markets. As can be seen in Table 16, the period from April to September showed the most serious declines in numbers, resulting from declines in both of these markets. Perhaps diversification into new European markets will strengthen the customer base and reduce dependence on these core markets.

Prospects for Irish Tourism 2002

Two main trends are expected for 2002, the first is a reluctance by the Americans to return to long-haul flights and thus Ireland. On the other hand, Europeans are likely to want to stay closer to home, and thereby Ireland should benefit.

If, however, the tourism industry in Ireland is to continue to develop, a number of issues are of key importance:

- Maintenance of a competitively priced, regular access to and from our main markets;
- Provision of identified access roads and sanitary services infrastructure to support use of visitor attractions and tourist areas;
- The development and appropriate management of a range of cultural and heritage activities capable of being marketed overseas, and;
- Pursuit of an environmental policy which accommodates the sensitive development and expansion of tourism with opportunities for the development of rural tourism and the enjoyment of natural resources for tourism sport and recreation (Department of Tourism, Sport & Recreation, 2001, pg. 10).

Conclusion

With these various issues under control, and suitable care taken to maintain Ireland's strengths as outlined above, tourism is set to continue in its pivotal role in the economic development of modern Ireland.

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Alternative Table 4

Table 4 : Positive and Negative Impacts of Tourism		
Impact Type	**Positive**	**Negative**
Economic Impacts	• Increased expenditure • Employment creation • Increased labour supply • Increased standard of living • Increased investment • Increased awareness of a region • Increased knowledge re-potential for investment • Creation of new facilities attractions and infrastructure • Increased accessibility	• Localised inflation • Real estate speculation • Failure to attract tourists • Undesirable opportunity costs – i.e. funds for alternative developments re-diverted • Capital outflow • Inadequate estimates of costs of tourism • Acquisition of poor reputation due to inadequate facilities, poor practice or inflated prices • Impact on existing enterprise – competition for workforce and government assistance
Socio-Cultural Impacts	• Increase in permanent level of local interest and participation in types of activity associated with event • Strengthening of regional values and traditions	• Commercialisation of activities which may be of a personal or private nature • Modification of nature of event or activity to accommodate tourism • Potential increase in crime • Changes in community structure • Social dislocation
Psychological	• Increased local pride and community spirit • Increased awareness of non-local perceptions	• Tendency towards defensive attitudes concerning host regions • High possibility of misunderstandings leading to varying degrees of host/visitor hostility
Political / Administrative Impacts	• Enhanced international recognition of region and values • Development of skills among planners	• Economic exploitation of local population to satisfy ambitions of political elite • Distortion of true nature of events to reflect values of political system • Failure to cope • Inability to achieve aims • Increase in administrative costs • Use of tourism to legitimise unpopular decisions • Legitimating of ideology of local elite
Environmental Impacts	• Development of new facilities • Improvement of local infrastructure • Conservation of heritage • Visitor management strategies	• Environmental damage • Changes in natural processes • Architectural pollution • Destruction of heritage • Overcrowding • Changed feeding and breeding habits of wildlife
		Source: After Hall, C.M. and Page, S.J. (1999)