

Dublin's changing tourism geography

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ABSTRACT

This paper considers the changes which have been experienced by Dublin's tourist industry over the past decade, placing them within a national and international context. Within a context of increasing tourist numbers and revenue, it asks whether Dublin's tourism geography has also changed? Looking specifically at hotels, it considers recent developments, their nature and location, particularly in terms of the impact of urban renewal incentives. It also considers the location of Dublin's major tourist attractions and questions the extent to which locational diversification can occur. The implications of these changes for a sustainable tourism industry in Dublin into the future are considered.

Key index words: Dublin, urban renewal, tourism, hotel location.

A decade of change

In 1992 the *Irish Times* ran the headline- 'Dublin - failing to make the tourism grade' (23rd September 1992: 10). Since that date, visitor numbers and revenue from tourism have almost trebled as the city has experienced a tourist boom. This paper addresses the causes of this dramatic development and considers its impacts, including locational changes within Dublin's hotel sector.

In recent years Ireland has been enjoying a distinct upsurge in its fortunes as a tourist destination. Not only have visitor numbers and revenues increased, but comparisons show that this increase has been ahead of both European and World averages. Preliminary estimates for 2000 show an increase of tourist arrivals into Europe of 6.1 percent, with a global increase in international tourist arrivals of 7.4 percent and a 4.5 percent increase in receipts (World Tourism Organisation, 2001). Bord Fáilte figures for overseas tourism into Ireland in 2000 suggest that tourist visits grew by six percent to 6.3 million while an eighteen percent increase in foreign exchange earnings generated the country's highest ever tourism revenue.

In Dublin, positive tourism trends have also been evident, with 1999 marking the tenth successive year of tourism growth in the city. By 2000, the number of overseas tourists had reached 3.4 million, while the total number of visitors to the city, including overseas, Northern Ireland and domestic tourists, amounted to 4.49 million. Over 54 percent of all overseas tourists visit Dublin (2000 figures), which earns 25 percent of all tourist revenue (31 percent of overseas tourist revenue) generated in Ireland. Total tourism revenue in Dublin city and county reached IR£781.6 million in 2000. It has been estimated that there are 37,000 people employed in tourism in the Dublin area, of a national total of 126,700. Furthermore, continued growth is projected into the future. By 2006 Dublin could have almost five million overseas visitors generating up to £1 billion in revenue and supporting more than 40,000 jobs (Dublin Chamber of Commerce, 2000).

Table 1: Dublin tourism, 1990-2000.

Year	Overseas Tourists (,000)	Domestic & Northern Ireland Tourists (,000)	Revenue (IR£M)
1990	1254	1039	203.5
1995	2134	1209	525.6
2000	3433	1059	781.6

Source: Bord Fáilte estimates.

Table 2: Dublin Tourism in an international context.

International Tourist Arrivals	1990	1995 (,000)	2000*	Percent change (2000/1995)
World	457217	565384	698794	+23.6
Europe	282744	338382	403303	+19.2
Ireland	3666	4821	6273	+30.1
Dublin Tourism Region	n.a.	2134	3433	+60.9

Source: World Tourism Organisation (* preliminary figures) and Bord Fáilte (excluding Northern Ireland tourists and excursionists).

Dublin as a Gateway

It is to be expected that Dublin should lead the country in terms of tourist numbers and revenue for a number of reasons. Simply by virtue of its situation as a major point of access to the country by both air and sea, Dublin's gateway position inevitably contributes to its tourism potential, while its position as a national Capital encourages visitors to several major national institutions. In the past, it was common for arriving tourists to leave the city almost immediately in search of the much-promoted green rural idyll. However, increasingly tourist arrivals are staying longer in the Capital and may not travel elsewhere, as illustrated by figures showing an increasing proportion of overseas tourists who neither bring nor hire a car.

Access to Ireland in general and to Dublin in particular has been improving since the late 1980s, when liberalisation and deregulation of air transport led to increased competition on routes and generally cheaper flights. Ferry companies were also forced to become more competitive in order to maintain their position. Irish Ferries have reported a 300 percent increase in sailings over seven years, with a 400 percent increase in car-carrying capacity (Dublin Chamber of Commerce, 2000). Their flag-ship *Ulysses*, the world's largest car ferry, commenced service between Ireland and Great Britain in summer 2001. In 2000 Dublin Airport experienced its ninth successive year of growth in passenger numbers, with some 30 scheduled airlines flying to Dublin from a total of 75 scheduled destinations (Aer Rianta, 2001). As one of the fastest growing airports in Europe in the 1990s, between 1991 and 1998 there was a 120 percent increase in passenger traffic while in freight traffic increased by 166 percent between 1991 and 1998. Among the principal reasons cited for that growth are growing tourism, increasing levels of international business being transacted from Ireland and increasing competition between airlines, resulting in lower fares.

Table 3: Growth in access through Dublin Airport, 1990-2000.

Year	Number of passengers (millions)	Scheduled airlines	Scheduled destinations
1990	5.51	n.a.	n.a.
1995	8.02	24	59
2000	13.80	30	75

Source: Aer Rianta Annual Reports.

Considerable congestion in the airport has been an inevitable outcome of this rapid growth. Although expansion of the terminal building is currently underway, forecasts suggest that passenger numbers will have reached the capacity of the current development by 2006 (Aer Rianta, 2001). There have also been repeated calls for the development of a second civilian airport to serve the Capital, despite concerns over the likely negative environmental impacts. Access to the airport is an increasing problem. A taxi blockade in late 2000 clearly illustrated the total dependence on road connections between Dublin airport and the city. Current debate surrounds the plan to provide a light rail (LUAS) link rather than a full heavy rail service to the airport, while Dublin Chamber of Commerce (1999) has called for a public-private partnership to design, build and operate such a heavy rail link service, adopting a similar approach to that taken for London's Heathrow Express.

Factors promoting tourism development

Dublin is no longer just a gateway to Ireland, but is increasingly seen as a destination in its own right, with growing cosmopolitan appeal. While improved levels of accessibility have played a part in shaping the new tourist city, the growth in tourism in Dublin in the 1990s has reflected a number of significant changes in holiday-making patterns as well as the worldwide increase in tourism demand. Changes in taste have seen a move from mass consumption of standardised holiday products towards more specialised niche-market holidays. Tourist marketing companies, including Bord Fáilte, have adjusted their marketing strategies to focus on particular product areas, such as active pursuits, cultural or heritage interests and business travel. As Williams and Shaw (1990) suggest, there are now many different forms of tourism, each with its own distinctive regional implications, which do not necessarily conform to an elementary core-periphery model where tourism offers a simple mechanism for income redistribution from core to periphery regions.

Alongside this general trend towards niche holidays, there has been a more particular move towards weekend and short-break holidays. Large cities have come into their own as attractive locations for such short visits, given their concentration of attractions within a relatively compact area. While certain European cities, such as London and Paris, have been popular tourist destinations from Roman times to the era of the Grand Tour, the late 1980s and 1990s saw considerable investment by cities which previously had no tradition of tourism. Tourism was embraced as a major policy instrument for many economic regeneration strategies on an urban or regional scale, as in Glasgow, Barcelona and Liverpool (Williams and Shaw, 1988; Law, 1990; Vaughan, 1999). This resulted in the active promotion of urban business tourism (conferences and conventions), sport and event-related tourism and

the development of new attractions centred around leisure shopping or industrial heritage, with the aim of developing and revitalising flagging local or regional economies (Williams, 1998). Thus Manchester, Birmingham and Bradford, among others, invested in the development of heritage centres and shopping facilities to attract visitors (Law, 1993).

In Ireland too, investment in tourism in the last two decades was intended to boost the national economy and increase employment levels, availing of substantial funding for facilities and marketing from the European Union under two *Operational Programmes for Tourism* since 1989. Similarly, in Dublin in the late 1980s it was argued that tourism could contribute to a then ailing city economy (Dublin Chamber of Commerce, 1988). As in other cities, urban renewal and tourism became closely linked. Since 1986, urban renewal incentives have contributed to the reshaping of the city's physical fabric, and in doing so have had both direct and indirect effects on tourism. Impacts have included the increased attractiveness of the city, as areas of blight have been redeveloped, while the tourism infrastructure has benefited more specifically through the construction of new hotels as well as a growth in the number of bars, restaurants and entertainment facilities. The urban renewal programme has been associated with an emphasis on public-private partnership and the global trend towards marketing cities as distinct entities. In Dublin this has been reflected in the establishment of Dublin Tourism, a State-appointed, commercial agency, as the body with responsibility for the servicing, development and promotion of tourism in the region. Membership includes Bord Fáilte, the four local authorities and more than 1300 businesses, including hotels and other accommodation providers, restaurants, museums, pubs, shops and attractions. Its goal is to enhance Dublin's economy through tourism development, to be achieved by marketing the region as a premier destination for the business and leisure traveller (Dublin Tourism, 2000).

Hall (1998) has outlined how, in the move from mass to niche/post-modern tourism and travel experiences, Europe's metropolitan areas became major tourism magnets. Economic strategies which embraced tourism as a major policy instrument have often involved major infrastructural investments such as waterfront redevelopment and the promotion of 'sense of place' through major events and festivals. This can be seen in the case of Dublin where Dublin Tourism's strategy reflects the international trend towards event-led tourism. One of the major events of 1999 was the MTV Europe Music Awards, held in the Point Depot, which generated a television viewing audience of up to one billion people. The choice of Dublin to host the official opening of the Tour de France, the world's biggest annual sporting event, was considered to be a considerable coup for the organisation in 1998, a year which also saw the hosting of the final leg of the Cutty Sark Tall Ships Race. In addition to sporting events, festivals of various kinds are seen as important in the marketing mix. Foremost among these is the reincarnation of the annual St Patrick's day parade as a five-day-long festival involving pageantry, street theatre, fireworks and huge promotional campaign. The city's tourism strategy will continue to include the hosting of prestigious international events for the foreseeable future, with forthcoming events including the Special Olympics in 2003 and the Ryder Cup in 2005.

Aside from increased investment and marketing, Dublin has also benefited from a perception that it is a fashionable place to be. In its recent report, Dublin Chamber of Commerce (2000) argues that the increased importance of short break tourism in Dublin is related to two major factors. The first, quantifiable, factor is the improved access to the Capital in the form of low-cost air travel. The second factor relates to image and perception, with a

vibrant image being created, according to the report, by Riverdance, the Irish soccer team, the booming economy and (last on the list) the continuing peace process. It is noteworthy that Riverdance recently became overall winner of the Dublin Tourism Business Through Tourism in Dublin Awards, in recognition of its contribution to tourism growth in the city.

Dublin as a European city destination

Dublin's new-found importance as a European city destination is evident from tourism statistics. Dublin Tourism figures suggest that Dublin is ranked the third most successful city in Europe in number of bednights, after the well-established destinations of London and Paris, and fourth in terms of arrivals after London, Paris and Rome. Bord Fáilte data shows that Dublin is far less reliant on the domestic market than any other region. In 1999, some 85 percent of Dublin's tourism revenue came from overseas tourists, with just over 12 percent from domestic tourists and the remaining 2.8 percent from Northern Ireland visitors. This contrasts with the other tourism regions in Ireland, where approximately two-thirds of tourist revenue comes from overseas tourists and one-third from the domestic and Northern Ireland market. Thus, in common with other European capital cities, Dublin is tapping in to a particular market, one which is distinct from the more general profile of visitors to Ireland. For example, almost one third of visitors to Dublin are engaged in business activities, including attendance at conferences, meetings and exhibitions, in contrast with a national average of just one quarter. Other motivating factors for urban tourist visits may include shopping (sometimes termed 'leisure shopping'), cultural and heritage tourism, particular events and outdoor recreation.

Table 4: Main purpose of visit by overseas tourists to Dublin and Ireland, 2000.

	Dublin	Ireland
Holiday	42%	41%
Visit Friends/Relatives	19%	23%
Business	29%	25%
Study/personal/other	10%	11%

Source: Bord Fáilte.

As well as increasing levels of urban tourism, Europe has also witnessed an increase in competition for tourism market share. The importance of addressing marketing strategy towards specific market segments has been recognised in Dublin (Flanagan, 1999). Among the key groupings which have been targeted are those interested in shopping, where Dublin Tourism has specifically promoted an Icelandic charter series bringing Icelandic visitors to Dublin each autumn/winter. In 1998 approximately 8,000 Icelanders visited Dublin over a ten-week period, generating an estimated spend of £9.2 million, over and above the costs of airfares and accommodation. This programme is being expanded into new markets including Sweden, Norway, Finland and Belgium. Other segments with higher than average expenditure have also been targeted, such as incentive visitors and cruise tourists. In 1999 the 37 cruise ship calls to Dublin accounted for 22,000 passengers and contributed some £4.2 million to the local economy. Although small in overall impact, this segment is considered attractive due to the exceptionally high daily expenditure of cruise tourists.

Hotels in Dublin

As tourism has flourished in 1990s Dublin, there has been significant growth in the hotel sector. Between 1991 and 1997, the number of hotel rooms available in the Dublin region doubled. Dublin now accounts for seventeen percent of the State's hotels, and 29 percent of hotel bedrooms. Accompanying this general numerical increase is a changing geographical spread, with new hotels in the city centre and in out-of-town locations, particularly at nodes along the main access routes to the Capital (Figures 1 and 3). Relative to Ireland's other tourist regions, the proportion of tourist accommodation provided by hotels in Dublin is high. In 1999, approximately 75 percent of Dublin's accommodation stock was provided by hotels, compared to approximately one-third throughout the remaining tourism regions. Dublin Chamber of Commerce has estimated that, of the £650 million spent by tourists in the city in 2000, 30 percent was spent in hotels and guest houses, 22 percent in the shops, 30 percent in pubs and restaurants, nine percent on transport, and the balance on entertainment, sightseeing and other activities.

Table 5: Approved room capacity in Dublin, 1995 and 1999.

	1995	2000	Percent change
Total Hotels	5689	11135	+95.7
Guesthouses/B&Bs	2042	2553	+25.0
Self-catering	243	408	+67.9
Caravan/camping	146	309	+111.6
Hostels (beds available)	1541	2162	+40.3

Source: Bord Fáilte.

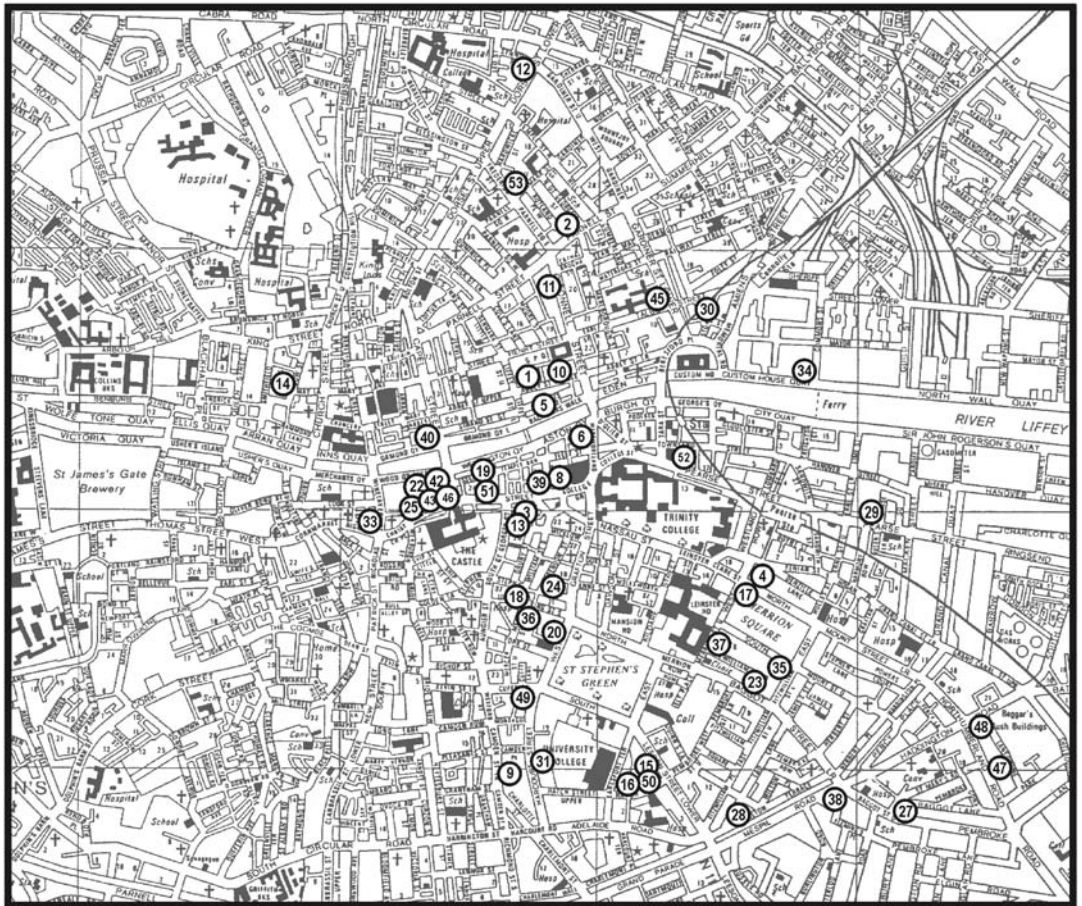
Hotel growth peaked in 1998, when over 27 new hotels were opened, on average more than one hotel every fortnight (Dublin Tourism, 1999). Since then, growth appears to have slowed, although a considerable number of existing hotels have added extra rooms and facilities to their premises.

Table 6: Relative size of hotels in Dublin, 2000.

Hotel type	Number of establishments	Number of rooms	Average number of rooms
1*	3	57	19
2*	13	430	33
3*	40	3760	94
4*	10	1994	199
5*	7	1312	187
NR/AC/R	26	2131	82
Unclassified	16	1308	82
TOTAL	115	10992	

Source: Based on information in Dublin Accommodation Guide 2000.

NR/AC/R: Not registered / Awaiting classification / Undergoing renovation.



1	Abbey	19	Fitzsimons	37	Merrion
2	Academy	20	Fitzwilliam	38	Mespil
3	Adams Trinity	21	Four Seasons*	39	Morgan
4	Alexander	22	George Frederic Handel	40	Morrison
5	Arlington	23	Georgian House	41	Mount Herbert*
6	Aston	24	Grafton Plaza	42	Paramount
7	Bewley's Ballsbridge*	25	Harding	43	Parliament
8	Bewley's Principal	26	Herbert Park*	44	Portobello*
9	Camden Court	27	Hibernian	45	Ripley Court
10	Capri	28	Hilton	46	River House
11	Cassidy's	29	Holiday Inn	47	Roxford Lodge
12	Caulfields	30	Hotel Isaacs	48	Schoolhouse
13	Central	31	Jackson Court	49	Stephen's Green
14	Chief O'Neill's	32	Judge Darley's	50	Stephen's Hall
15	Clarion Stephen's Hall	33	Jury's Christchurch Inn	51	Temple Bar
16	Conrad	34	Jury's Custom House Inn	52	Trinity Plaza
17	Davenport	35	Longfields	53	Walton's
18	Drury Court	36	Mercer at RCSI		

* Off map

Figure 1: Hotels opened in Dublin since 1989, excluding those at major suburban transport intersections.

Room capacity in hotels increased overall by 92 percent in the last seven years (1994 to 2000). This simple statistic masks a significant shift within the sector, as lower grade (one and two star) hotel room numbers have declined, mirroring a national trend, while there has been a growth in three- and four-star accommodation. In addition, there has been a trebling of capacity in the 'other' category, attributable to those new hotels awaiting grading or opting for no grade. The greatest proportional increase has occurred in the availability of three-star accommodation in the city, catering for tourists on a relatively modest budget.

Table 7: Registered ('approved') hotel room capacity in Dublin.

Year	Total	5*	4*	3*	2*	1*	Other
1994	5736	1107	731	1893	775	464	766
1995	5689	1120	1065	1802	710	492	500
1996	5815	1092	1026	2109	708	339	541
1997	6092	1139	1128	2338	553	339	595
1998	7596	1165	1211	2560	640	314	1706
1999	10489	1313	1883	3921	827	199	2346
2000	10992	1312	1994	3760	430	57	3439

Source: Bord Fáilte published figures and Dublin Accommodation Guide (2000).

Comparison pre-1994 is not possible due to the changed grading system. 2000 figures were derived from Dublin Tourism Accommodation Guide and may not be directly comparable with previous years.

Changing hotel locations 1960-2000

As the nature of tourism has changed, so too has the location of tourist accommodation. In 1960 there were some 80 hotels within the city area. What is striking is the distinctive clustering of these accommodation providers, often in areas which have few hotels today (Figure 2). However, it is worth noting that in many cases the hotels which no longer exist were in fact reclassified as guesthouses or B&Bs as standards rose and premises which had shared bathrooms became less desirable to visitors. Unsurprisingly, areas close to the railway termini were popular locations for hotels, many of which had been in existence for some time. Clusters existed at Amiens Street, Westland Row and close to Kingsbridge, now Heuston Station. In 1960, Harcourt Street boasted the greatest number of hotels in the city, with thirteen separate establishments on the street. The location was close to St Stephen's Green, site of two of the most prestigious hotels in the city, while proximity to the recently-closed Great Southern Railway Terminus had probably been a factor influencing location in the past. A number of Harcourt Street premises which had been hotels in the 1940s had already been converted to other uses. In particular, three hostels were located on Harcourt Street, providing accommodation for students at University College Dublin and the Royal College of Surgeons, as well as for young single women, many of whom worked in the civil service. By 1971 the hotel business on Harcourt Street had gone into decline, with just six hotels listed in Thom's Directory for that year. One of the interesting features of recent years has been resurgence of hotel accommodation in Harcourt Street.

O'Connell Street was still one of the most important thoroughfares of Dublin in 1960, as reflected in the clustering of hotels nearby, including Wynn's hotel on Lower Abbey Street and Moran's of Talbot Street. The area north and east of O'Connell Street, which remains an

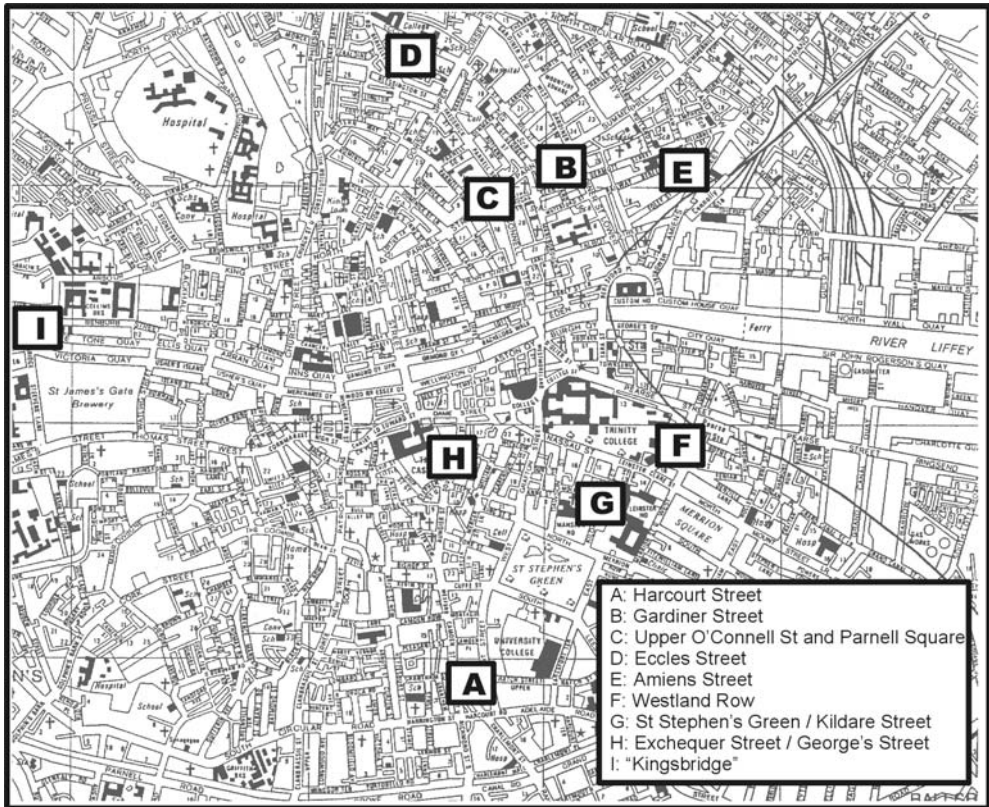


Figure 2: Hotel concentrations in Dublin, 1960.

important location for B&Bs, was another hotel node in 1960. Gardiner Street had five hotels in 1960, with a further three establishments in nearby Gardiner's Row and Gardiner Place. Parnell Square, Cavendish Row and Parnell Street were the site for a further nine hotels, while there were two hotels located on Upper O'Connell Street. Slightly further from the centre, but close to the Mater Hospital, three hotels were located in the Eccles Street area.

The three most fashionable and exclusive hotels in Dublin in 1960 were the Shelbourne, the Russell, also located on St. Stephen's Green, and the Royal Hibernian Hotel (established 1751) on Dawson Street. Proximity to Dáil Éireann was probably a factor in the location of Buswell's of Molesworth Street, a hotel since the 1920s, Power's Royal Hotel on Kildare Street and the Halcyon on South Anne Street. The only other notable focus for hotels was the South Great George's Street/Exchequer Street area, with four hotels. There were few hotels outside of the city centre, although already three hotels were located on Pembroke Road, close to Dublin's embassy belt.

In the 1960s and into the early 1970s a number of large, modern hotels were built, generally outside the city core. In particular, development pushed south of the canal into Dublin 4 which was home to the embassy belt and an emerging business area (MacLaran, 1993). By 1975, the landmark Jury's Hotel in Ballsbridge had been built, while the former Jury's hotel at College Green was closed. Other major developments at this time included the Burlington, which remains Ireland's largest hotel with over 500 bedrooms.

By and large, though, the 1970s and 1980s were a time of stagnation and closure for the hotel industry. A severe slump in the Irish tourist industry, associated with the troubled political conditions in Northern Ireland and increasing availability and popularity of cheap sunshine holidays in the Mediterranean, saw a corresponding decline in the capacity of the Irish hotel industry. Overall capacity fell from a peak of 15 million bed-nights in 1973 to 12.7 million bed-nights in 1978. The famous Russell Hotel on St Stephen's Green was closed and demolished in the 1970s, followed in 1984 by the Hibernian Hotel, the latter to be replaced by a shopping centre. Indeed, prior to the 1990s, the absence of high quality hotel accommodation in Dublin was seen as a barrier to the development of tourism in the city (Byrne and Palmer, 1980). Before the arrival of the Conrad group in 1990, Forte was the only international hotel group in Dublin. Thus, by 1989 there were just 43 hotels listed in the equivalent publication to that which had noted some 80 establishments in 1960. This decline makes the current increase in hotel numbers even more extraordinary.

Hotels and urban renewal in Dublin

Considerable private investment has flowed into Irish tourism in general over the past decade. This is highly evident both in the development of new hotel facilities and in the upgrading of existing accommodation. Initially, the movement into Dublin hotels came from international chains. The decision of the Conrad International chain to open a five-star hotel in the city was a milestone. Opening in 1990 it offered top-class accommodation and appealed particularly to the business traveller. The arrival in the 1990s of further international groups such as Meridien, Granada, Holiday Inn, Stakis, Raddisson SAS, Four Seasons and Ibis to Dublin has been largely welcomed by those in the tourism business, who recognise that many international tourists prefer to stay in the familiar surroundings of a well-known chain. It has also been suggested that the hotel projects most likely to enjoy success in the future will be those which are affiliated or associated with an international chain or with a good sales/marketing force selling their product to as many markets as possible.

Hotels became a popular investment from the early 1990s, aided partially by 20-30 percent EU funded grants resulting in almost £1 billion in investment in recent years. Another factor which drove the boom were tax breaks for hotel construction in designated urban renewal areas, resulting in capital allowances of 15 percent for the first six years and 10 percent in year seven, plus double rent and rates remission (Matthews, 1994). Thus most property commentators would contend that, quite apart from the increase in tourism, the major transactions in the hotel sphere have been dominated by investors taking advantage of the generous tax incentives available in this sector, estimated to have accounted for about £100 million in investment in a three year period (Power, 1997). For example, in April 2001 the new five-star Westin Hotel on College Green opened for three days before closing again until July. This was necessary to ensure that tax-breaks for the 2000-2001 tax year could be availed of (*Irish Times*, 11th April 2001) Some of the investment has been structured on the basis of operators/tenants buying back properties once the tax life of the project has expired, which may have implications for the longer term success of these developments.

Several new types of hotel accommodation have emerged in association with the development of the hotel sector in areas designated for urban renewal, including new three-star and small hotels, budget-type hostels and hotels based on the model of a fixed room rate irrespective of the number of occupants (KPMG *et al.*, 1996). Aside from the generous incentives on offer, the overall impact of urban renewal, in creating new cultural quarters,

new financial quarters and new shopping districts, has also had an impact in generating new development opportunities for the tourism and leisure sector.

Architecturally, the new breed of hotels has had limited success. A significant number of the new hotels in designated areas are located in new buildings, although it should be noted that some have used refurbished buildings including former banking halls and offices. In the newly-built accommodation, the tendency is to provide relatively small rooms, often looking out on service yards or the flat roofs of bars and restaurants. The prevalence of inadequately sound insulated stud partitions between some rooms has also been identified as a problem (KPMG *et al.*, 1996). The approach to hotel design in designated areas has been likened to the approach to speculative office design, where the applied image or corporate identity of the hotel chain is applied to a relatively simple 'box'. The authenticity of the tourist experience is challenged from the outset, given that 'the emphasis is on the provision of the maximum number of bed spaces and the 'creation of an ambience' through a 'theme' approach to interior design' (KPMG *et al.*, 1996: 68).

Table 8: Breakdown of 'other' development under urban renewal incentives by geographical area*.

Location	£ M	Percent of Irish total
Temple Bar	40	16
Custom House Docks Area	26	10
Rest of Dublin	79	32
Rest of Ireland	105	42
Total	250	100

* The 'other' category includes hotels, cinemas, nightclubs and cultural activities. The study found that over half of the development categorised as 'other' relate to hotels and car parks.

Source: KPMG *et al.*, 1996.

Alongside the rise of international chain hotels and relatively bland cheaper accommodation driven by tax incentives, more distinctive new establishments have also opened in Dublin. One of the positive elements of the urban renewal incentives has been the refurbishment of old buildings, with the hotels now located in restored Georgian houses and other listed buildings, old whiskey distillery buildings and schoolhouses. One particularly noteworthy venture was the public-private partnership which redeveloped the former headquarters of Dublin's fire service. As Dublin Corporation was unable to secure 100 percent Exchequer grant assistance to replace the Victorian fire station, it was decided to utilise the site's designated area status under the Urban Renewal Scheme to achieve the twofold objective of having a new fire brigade headquarters constructed while, at the same time, securing development on the surplus lands which had been derelict for many years. The new Trinity Plaza Hotel thus forms part of an overall project which includes a new fire brigade headquarters, apartments and a car park.

Whereas the appearance and themed approach of many of Dublin's new tax incentives hotels gives rise to concerns about the resultant homogeneity of streetscapes and of the tourist experience itself, the growth in Dublin's hotels has also seen the adoption of the 'boutique' hotel concept, the ultimate in niche marketing and an indicator of Dublin's chic image. The so-called boutique hotel is the response to a new market demand for distinctive hotels that

offer more personalized service, amenities, and style than traditional hotels. Whereas in the past, the mark of quality in a hotel was defined as a Hilton, the increasingly sophisticated traveller is now turning to boutique hotels to give them the same services, but with greater intimacy and personalized attention. Among the headline-grabbing boutique hotels in the USA are New York City's Paramount and the Delano in Miami both of which were renovated (or 'reinvented') rather than built from scratch. These hotels were devised by 'hotel impresario' Ian Schrager and designed by French architect Philippe Starck. The duo's first London hotel, St Martins Lane, exemplifies what Schrager calls 'hotel as theatre' with its minimalist architecture, surrealist touches including gold-leaf stools shaped like molars, and rooms where guests can 'paint' the room according to their moods, using a coloured light panel. Although boutique hotels still account for just a fraction of the total market, the major chains are taking note and developing their own versions.

In Dublin, a number of stylish, high-quality boutique hotels has emerged in the last number of years, including the Clarence and the Morrison, designed by John Rocca. Although the fifty-room Clarence first opened as a hotel in 1852, it has experienced a reincarnation in the 1990s as "Ireland's foremost boutique five-star hotel" (Tarpey, 1996: 70), offering its clients "personalised but idiosyncratic service" (Tarpey, 1996:71). The rooms feature wrought iron bedside lamps, specially commissioned oak furniture and leather chairs, while similar attention to style in the public areas assures the customer at every turn that this is not another chain hotel. A number of other Dublin hotels are consciously being marketed as boutique hotels, including the Morgan and the Stephen's Green Hotel.

A further trend has been the emergence of new ownership arrangements with involvement more frequently involving leases, management contracts and franchises rather than outright ownership. One example is Choice Hotels, Ireland, which has been in full operation in Ireland since February 1998. There are now 23 hotels under the franchise, including a mixture of new build and acquisitions, 16 of which are under direct management. In Dublin, Choice Hotels include the Clarion Stephen's Hall, the £26 million Clarion Hotel Dublin at the IFSC, Comfort Inn Talbot Street, Quality Charleville Hotel in Dublin 6, Quality Court Hotel Killiney and Quality Hotel and Suites in City West. Such operations benefit from a considerable marketing programme and are more likely to remain successful after the tourist boom begins to fade.

As Figure 3 illustrates, a number of hotel nodes can now be identified in the city. The importance of major access routes is also evident in the ring of hotels now emerging at transport hubs, such as the M50 ring, the Naas Road and the M1 route close to Dublin Airport. Thus, the changing relative importance of different forms of transport is evident in the shifting locations chosen for new hotels. Harcourt Street has regained ground as hotel location, while Temple Bar is a relatively new focus for accommodation. A number of relatively small, new hotels have been built in the latter area over the last decade. It might be suggested that such businesses represent an attempt to cash in on the lucrative pub scene in the area, since under current liquor licensing legislation a hotel with twenty beds or more located within a county borough area is entitled to a hotel license (Competition Authority, 1998). Thus the motivation behind opening a hotel may be linked, at least partially, to the opportunity to gain a pub license. The specific mention of this issue in the Dublin City Development Plan, 1999, which suggests that the composition of facilities within new hotels and extensions should properly reflect the purpose of a hotel and be proportionate to the overall size and function of the hotel, emphasises the perceived need to address this issue. In relation to the design of new hotels and conversion of existing premises it will be a

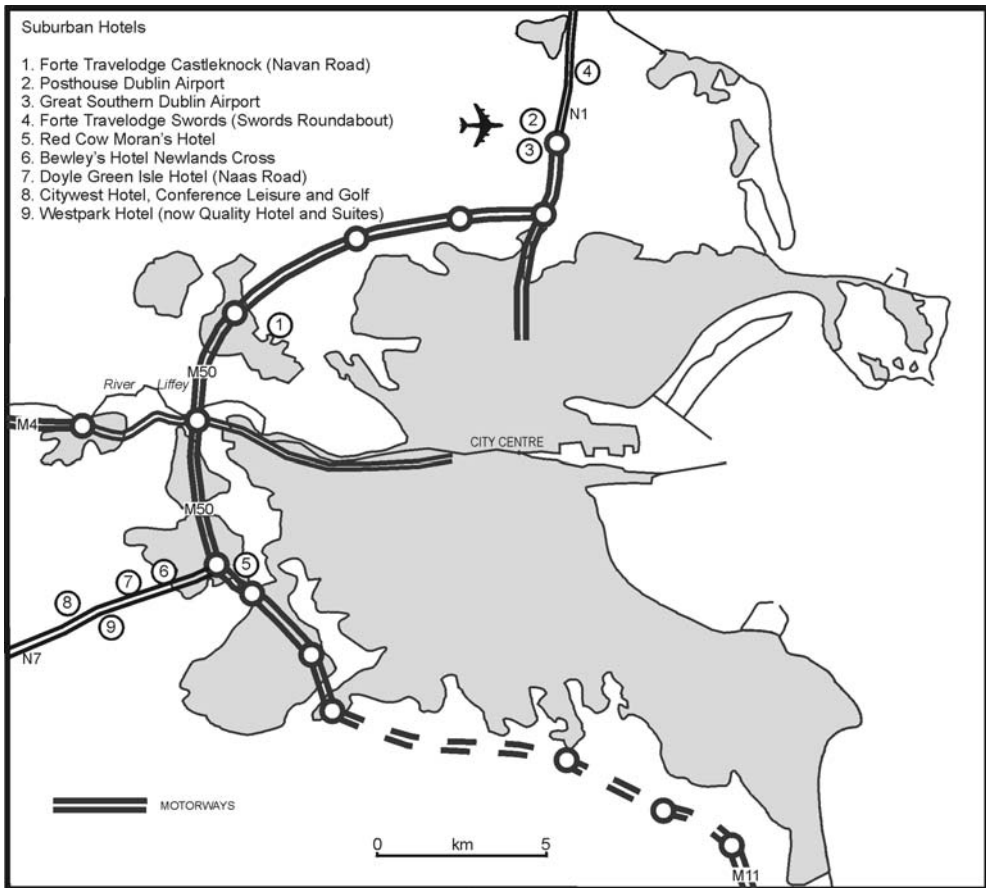


Figure 3: Hotels at or near major transport nodes.

requirement to locate bar and lounge facilities at first-floor level or to the rear, while it is specifically stated that such bar and lounge facilities should be demonstrably in proportion to the number of bedrooms provided.

While many of the locations chosen for hotels reflect the availability of tax incentives, it might be suggested that planning restrictions within the city are a further influence on hotel development and location. For example, Noel O’Callaghan, developer of the Stephen’s Green Hotel, has observed that his preference would have been to erect an office block on the site, but that the planning preference was for a hotel which would bring more life to the area, particularly in the evenings (Mulcahy, 1998).

Future of new hotels?

The considerable growth in the city’s hotel stock has had positive impacts for tourism, such as allowing the industry to attract a broader range of customers and encouraging price competitiveness (and thus the retention of Dublin’s attractiveness as a destination) (Dublin Chamber of Commerce, 2000). However, even with the tax incentives which spurred so much growth in this area, hotels are expensive and slow to develop. Jones Lang Wootton has estimated that budget hotels in Dublin cost up to £40,000 on average per room including site,

economy/three-star hotels cost between £50,000-£75,000, while four/five-star hotels can cost £80,000 upwards (Power, 1997). Recent difficulties experienced by the Holiday Inn on Pearse Street and delays to the Four Seasons hotel in Ballsbridge have highlighted the high development costs in the industry. Given such considerable investment outlay, the implications of any reduction in demand are worrying.

During the 1990s, the strong growth in Dublin's tourist market both led to an increased supply of hotel accommodation and was further encouraged by its existence. However, concerns are now being raised that the Capital will not be able to sustain all of the new hotel beds now available. Although occupancy levels in Dublin hotels have consistently been the highest of all the tourism regions, room occupancy rates have fallen each successive year since 1997 as a result of increased supply. The disproportionate increase in Dublin hotel bedroom stock relative to the increase in tourist numbers is now being recognised by many professionals in the industry. As early as January 1999 the chief executive of Dublin Tourism, Frank Magee, was warning that half the tourist accommodation in Dublin could be superfluous by 2001 (Sheridan, 1999). The Central Bank's Winter Report (2000) noted that banks have become more cautious, leading to an end to the previous growth in bank lending to the hotel sector.

A recent article in the *Irish Times* expressed the opinion that modern Irish hotels were "dreary, characterless and devoid of individuality" (O'Byrne, 2000). It also highlighted another problem with contemporary Irish hotels: the lack of a sense of place. The bemoaning of a lack of distinctively Irish architecture can be traced back at least to the early years of the Irish Free State. However, in the tourism context the desirability of an attractive and 'Irish' experience is even more significant. If the tourist's encounter with Ireland takes place in surroundings which are identical to the equivalent anywhere else in the world, does that somehow detract from their experience? Although some tourists prefer the familiarity of a particular hotel chain, surely the 'tourist bubble' is not an essential part of every visit. If Dublin hotels become like hotels anywhere else, while Dublin pubs are revamped to look like the 'Irish' bars which have been exported worldwide, and Dublin's cafés and other entertainment venues are increasingly international, what is there that remains distinctive about visiting Dublin?

Whether or not the increasing homogeneity of the tourist product will deter visitors remains to be seen. However, the very survival of many new hotels in the future might well be questioned, particularly those which are less well-placed. It is likely that the investment-led hotels will be the first to suffer as occupancy levels fall. One Dublin hotelier has described having been offered for sale two sizeable hotels that were open less than 18 months, both of which he described as developments carried out by property developers just to avail of the capital allowances tax breaks (Mulcahy, 1998). While the tourist boom continues and hotel beds are still at a premium, tourists will remain content to stay in less-attractive locations. However, unless certain locales currently benefiting from tax incentives also experience gentrification, tourists may choose to stay away. For example, a new hotel located on Pearse Street, although advertised as being just 1 km from the city centre, may find that it will have difficulty retaining its clientele, given the micro-geography of the area with its juxtaposition of extreme social deprivation and gentrification.

Location of Tourist Attractions

While Dublin is now considered by many to be a tourist destination on a par with other European cities, it should be remembered that the city is relatively small compared to those

with which it is most frequently compared. Whereas London, Paris and Rome have numerous attractions located throughout the urban area, Dublin's tourism geography is relatively restricted, with the majority of tourists tending to focus on the area located to the south of the river, concentrated between Merrion Square and Christ Church Cathedral. The restricted geography of tourism in Dublin has been addressed in the most recent Dublin City Development Plan (1999) which recognises a need to disperse tourism more widely, in order to maximise its economic and other benefits. Thus Dublin Corporation aims to identify areas which it sees as having the potential to develop as major tourism destinations. The new Integrated Area Plans (associated with the latest round of Urban Renewal funding) are seen as "major opportunities to co-ordinate the strategic expansion of tourism into the north inner city". The failure to expand tourism movement north of the river Liffey in the past is seen as relating to land-use problems, a poor public domain and the virtual absence of any coherent tourism infrastructure. It is noteworthy, in this context, that Dublin Tourism has recently reopened its information centre in O'Connell Street. Similarly, Dublin Tourism's 1998 annual report specifically addressed the development of infrastructure along the River Liffey which would, it was suggested, help to relieve the congestion experienced at peak times in the more traditional tourism precincts. Both Dublin Corporation and Dublin Tourism see a need to strengthen attractions to the west of this zone, including the National Museum at Collins Barracks and the Smithfield Village, as well as the rejuvenation of O'Connell Street. It is now the stated policy of Dublin Corporation to discourage over-development of tourism in any one area, and to this end it proposes to establish tourism thresholds for each area (Dublin City Development Plan 1999, Policy TA3 6.3.0.).

Certainly the geography of Dublin's tourism attractions has gradually been changing during the 1990s. Recent attempts to develop attractions in new locations such as Smithfield and the docks area are significant in that they aim to spread the number of visitors across a greater area and thereby reduce congestion in areas such as Temple Bar (itself a relatively new tourist attraction) and Grafton Street. These efforts have been considerably assisted by receipt of grant aid under the Operational Programme for Tourism, 1994–1999, under which the Dublin region was awarded a total of £38,678,778 (Table 9). This assisted in the provision of visitor facilities at locations including the National Museum at Collins Barracks (£11.67 million), the National Gallery (£7.5 million), the Chester Beatty Library (£2.25 million), the GAA Museum (£1.5 million) and the James Joyce Cultural Centre (£348,000). It is clear that a large proportion of the funding, particularly the largest amounts, went to large cultural, heritage or interpretative facilities which are considered to be of national importance.

The top five visitor attractions in Dublin are also the five most visited attractions in the country, according to Bord Fáilte statistics. Most of the major attractions in the city are also key national institutions. Dublinia is one of the most successful new attractions, ranked at 13th most visited attraction in the city with 101,595 visitors in 1998. Other new magnet developments such as Ceol at Smithfield have been applauded, but it remains to be seen whether they will successfully entice tourists to new locations.

The need for tourism thresholds is particularly evident in the case of Temple Bar. The area might be seen as one of the major beneficiaries, and perhaps also one of the major casualties, of the tourist boom. Since the passing of the Temple Bar Area Renewal and Development Act 1991, this area which lies between the Liffey and Dame Street/Lord Edward Street, and extends from Westmoreland Street to Fishamble Street, has been transformed into a bustling cultural, recreational and residential precinct, which attracts large numbers of visitors from all over the world. Physical congestion of the narrow cobbled streets

has become a problem as pedestrian numbers quadrupled from 1992 to 2000. Within an area of approximately 24 acres (c.9.7 hectares) there are now at least 44 restaurants, 28 licensed premises, 15 nightclubs, 12 hotels or hostels, 12 cultural centres, 1200 employees, 1500 residents and 100,000 visitors every 24 hours, on average (*Irish Times*, 5th August 2000).

Table 9: Projects approved in Dublin under the Operational Programme for Tourism (1994-1999) receiving grant aid of £500,000 or above.

Development	Project Description	Grant (£,000)
Collins Barracks	Museum development	11,677
National Gallery	Extension to premises	7,500
Chester Beatty Library	Relocate and restore collection	2,250
Tourist Information Centre St Andrew's Dublin	National Tourist Information Centre	1,654
Botanic Gardens	Visitor facilities	1,500
GAA Museum	Museum/interpretative centre	1,500
Malahide Marina Villages	Marina, leisure facilities	1,500
Camac Valley Caravan Park	Camping and caravan park	1,028
Tallaght Theatre	New theatre facility	986
Blanchardstown Arts Centre	Arts centre	986
Rathfarnham Castle	Visitor facilities	900
Dún Laoghaire Theatre	New theatre facility	896
Central Fisheries Board	Title research project (phase 1)	655
Irish Museum of Modern Art	Additional exhibition space	530
St Audeon's Church	Visitor facilities	525
TOTAL		34,087

Source: Department of Tourism and Sport.

Table 10: Top Attractions in 1998.

Rank	Attraction	Visitor Numbers
1	National Gallery of Ireland	896,475
2	Dublin Zoo	526,567
3	Book of Kells	498,574
4	Guinness Hopstore	473,600
5	Hugh Lane Gallery	395,352
6	Irish Museum of Modern Art	290,000
7	St Patrick's Cathedral	242,166
8	Christ Church Cathedral	220,000
9	Dublin Castle	178,000
10	Old Jameson Distillery	135,572

Source: Bord Fáilte.

New 'products': the failure of the Icon Centre at Leopardstown

Enticing tourists to new locations may be a difficult task. The emergence of Temple Bar as a popular tourist district is not that surprising, given its location between several major attractions (including the two cathedrals and the Guinness brewery) and the shopping heart of the city on Grafton Street. Other areas may not develop as readily.

In April 1999 the £17.5 million, 20,000 square foot (c.1860 square metres) Icon Centre at Leopardstown Racecourse sponsored by Bailey's was opened. The complex was applauded by the Dublin Chamber of Commerce (2000) and by Dublin Tourism, which described it as bringing "Baileys and Ireland to life in a really motivating, informative and entertaining way" (Dublin Tourism, 2000: 12). The attractions available to the Icon visitor included a "stunning sensory experience, full bars and snack foods, fresh seafood bar, fresh Irish cuisine restaurant and unique Bailey's retail store". The bar and interpretative centre was intended to appeal to tourists interested in the brand and, as such, be part of a tourist trail that would include the visitors' centre at the historic Guinness brewery in the city centre and the Whiskey Corner at the former Jameson distillery in nearby Smithfield. Thus, Icon was to be a "brand identity centre" for Baileys. One difference between Bailey's and the aforementioned brands is that Bailey's is a marketing creation, a whiskey and cream liqueur which was developed 26 years ago and is manufactured at an ultramodern plant in a west Dublin industrial estate.

However, in January 2001 it was announced that the centre was to close with the loss of 64 jobs. Of a projected 200,000 visitors by the end of 2000, only 80,000 actually visited the centre. In the same period, more than 300,000 people paid into Jameson's visitors' centre. The centre's out-of-town location, more than five miles (8 kilometres) from the city centre, and its inability to attract local custom were also cited as factors in its eventual demise. The centre's interior design was a further problem, described in the *Irish Times* (18th January 2001) as "a bizarre combination of tourist kitsch, Victorian snug and modern industrial chic", which clearly clashed with Bailey's carefully cultivated sophisticated, urban image. Thus, enticing tourists to new attractions outside the core is clearly not easy, while creating what amounts to a fake heritage did not impress the more sophisticated modern tourist, even in an age when 'heritage' and 'cultural' tourism has gained such prominence (Hall, 1998; McManus, 1997).

The future of tourism in Dublin

Tourist interests in Dublin are anxious to dispel what they see as a misconception that Dublin is full and does not need to be promoted further (Dublin Tourism, 1998; Dublin Chamber of Commerce, 2000). Both Dublin Tourism and Dublin Chamber of Commerce have recognised a need to continue marketing the city, not just Ireland, as a destination. Dublin Chamber of Commerce (2000) has advocated the positioning of Dublin at the centre of the promotional push in international marketing, arguing that Dublin can act as the gateway to the tourism industry in Ireland generally. This is significant given recent arguments that Dublin's tourism success has been occurring at the expense of business in other parts of the country (Higgins, 1999). In April 1997, the chairman of Bord Fáilte found it necessary to defend Dublin's position, suggesting that Dublin was unlikely to become a free-standing mass destination in its own right, but was instead resulting in a 'spin off' for the rest of the country (Mortell, 1999). In general, Ireland has been slow to recognise that Dublin's current experience is not the same as other forms of tourism, especially those with which Ireland is most familiar. City tourism is a separate segment with its own characteristics (Williams and

Shaw, 1990). This point is reflected in the claim that “if Dublin is not a travel option, the majority of our clients will look to other European cities rather than to another part of Ireland” (Dublin Tourism, 1999: 2). Experience has shown that the city is competing with other cities such as Edinburgh or Amsterdam for this particular market share, rather than other regions within Ireland. It can be suggested that at least some of Dublin’s visitors, attracted by its unique blend of attractions, a major event, or its current fashionability, would not otherwise have considered travelling to Ireland. Once in the country, they might decide to travel further afield, thus spreading some of the tourist benefits regionally. Certainly it can be suggested that there is a considerable level of spin-off from visits to the Capital. Figures produced by Bord Fáilte indicate that over 86 percent of visitors to Dublin go on to visit some other region of the country. This encourages the argument that Dublin can effectively act as a gateway to the rest of the country. Nor is it fair to argue that Dublin has a disproportionate share of the Irish tourism market. Dublin accounted for just under 25 percent of Ireland’s overseas tourism revenue in 1999, 20 percent of Northern Ireland and 13 percent of domestic tourist revenue. Given that the Dublin region accounts for over 25 percent of the country’s population, the percentage share of total tourism revenue is, if anything, less than it should be in order to be seen as equitable. The main issue is really linked with the current challenge to tourism’s former role in the regional redistribution of wealth. Traditional tourist areas in the counties along the western seaboard were classic ‘periphery’ areas, lacking an intensive industrial base. Thus the fact that Irish tourism activity was particularly concentrated in such peripheral areas has been seen as an important bonus (Tansey and Webster, 1991; Deane and Henry, 1993). The rise in urban tourism with a particular focus on Dublin, which is an area also currently experiencing major growth and urban sprawl, has challenged this long-held view and has in turn led to concerns about regional imbalance. In fact, tourism is probably more balanced than it was in the past.

The increasing levels of city tourism in Dublin have had a number of impacts. On the negative side, there has been an increase in congestion and overcrowding in the major tourist locations, which, associated with suggestions that the ‘wrong type’ of tourist was being attracted to the city, has led to frequently expressed fears that Dublin Tourism was “killing the goose that laid the golden egg”. Yet the benefits to the city have also been considerable, bringing year-round business to both the local and regional economy.

However, the degree to which current tourism growth in Dublin is sustainable might be questioned. Murphy (1985) has presented four elements that are fundamental to sustainability in his ecological model for community-based tourism planning. These involve the protection of the destination’s resource attractions, positive resident assessment of tourism, visitor satisfaction with their experience, and an acceptable return on investment for operators within the tourism industry. In Dublin, it might be suggested that certain of these elements have come under pressure in recent years. Congestion at key attractions is currently being addressed, although it remains to be seen whether the development of additional areas will adequately absorb the projected increases in visitor numbers in the short term. As residents become busier and less patient with tourist congestion, satisfaction for both resident and tourist alike begins to suffer, as has been shown in recent Bord Fáilte commissioned research (Irish Marketing Surveys, 2000).

It has been suggested that each city has its own blend of characteristics that contribute to its unique sense of place, including elements such as natural setting, cultural diversity, societal values, architectural style and other traits. To a large extent it is this sense of place

that makes an urban area attractive (Garnham, 1985). Yet sense of place is constantly under threat of erosion. The increasing homogeneity of urban design results in the built environment becoming more and more similar both within and between cities, while the socio-cultural setting of an area may also be threatened. The very process of marketing local culture for the consumption of visitors – commodification – may result in the loss of the essence of that culture and its contribution to the sense of place.

Within the Irish tourist industry generally, there has been concern that the characteristics which formerly attracted tourists to the country, such as friendliness, are disappearing. Thus the People and Place programme organised through the Irish Tourist Industry Confederation (ITIC) is aiming to protect the tourist industry's 'core values', addressing some of the problems of success. The core values to be protected include friendliness, spontaneity and interaction with visitors and care for the environment. The extent to which personnel can be trained to be 'spontaneous' remains to be seen.

Finally, in terms of generating acceptable returns on investment, there is cause for some concern. Given that much of the current hotel development has been based around the availability of tax incentives, it is possible that problems will be encountered when the incentives are used up and investors wish to move on to alternative tax efficient investments. It is also possible that economic slowdown will herald a decline in profitability for the many hotels which are currently specializing in providing state of the art conference facilities for their corporate clientele, while problems may also arise when business people who have jumped on the tourism bandwagon realise that they do not have the necessary skills and expertise to run hotels.

Those involved in the business must recognise that tourism, while possessing the potential for the sort of rapid growth recently seen in Ireland in general and Dublin in particular, is also equally subject to rapid processes of decline. Demand can be uncertain, competition and changing fashions can reduce market share, and outside forces can have a huge, negative impact on tourism. This was seen during the Gulf War when the reluctance of US citizens to travel depressed tourism across Europe, while volatility of exchange rates can also influence choice of destination. The year 2001 has seen a tourism downturn associated with foot and mouth disease and the terrorist attacks in the USA which may have longer term consequences. It is clear that Dublin's tourism geography will continue to evolve over the next decade. Whether this will involve expansion or contraction remains to be seen.

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