

State-Sector Flux: Challenges, Opportunities and Reflections from the Frontline of Ireland’s Hospitality Industry

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Abstract

A qualitative study was conducted to determine the issues and challenges facing operators in Ireland’s hospitality industry. Eight semi-structured interviews of hotel managers were inductively analysed and a process model was generated reflecting the key triggers and medium to long term issues for the operational environment. Furthermore, a higher-order theme “Systemic Complacency”, emerged from the qualitative analysis which the author argues, was symptomatic of the time during the hey-days of the Celtic Tiger. Across all interviews, Governance, Product and Business complacencies along with short-sighted policy objectives were identified as key factors from the data. These factors had the combined and cumulative effect of augmenting an already strained operating environment which mitigated competitiveness both in the economy and hospitality industry. Cost management and re-aligned business practices emerged as consequential reactions and are seen as opportunities to re-gain basic business fundamentals into the future. Recommendations for combining various qualitative approaches to research contextual phenomena and personal reflection is recommended and limitations of the study are discussed.

Keywords: global political economy, economic crisis, hospitality & tourism industry, inductive analysis, process theory, challenges

Introduction

According to the IMF (2009, p.103) “a large number of advanced economies have fallen into recession, and economies in the rest of the world have slowed abruptly.” Furthermore, as a small open economy, Ireland’s dependence on the performance of the international economy brings with it, an exposure to global risks. As such, “the severe current crisis can be seen, at least in part, as the manifestation of a range of the international risks inherent in Ireland’s economic position”(NESC, 2009, p.4) and has ultimately filtered down into the various sectors of the Irish economy, particularly Hospitality and Tourism. Consequently, there is a ‘*trickle down effect*’ borne from such economic vicissitudes which eventually, if not rapidly, bring with them a sense of shock and awe to the various economic sectors and general populous. As such, businesses have had to re-adjust to a new economic reality that requires a re-think of the operation from all aspects (Stern, 2009).

According to the ITIC (2009), the downturn in international tourism as a result of the global financial crisis has resulted in a sharp decline in demand environments. Further, “the downturn has caused difficulties for many businesses engaged in tourism, with several casualties and many more struggle to survive” (ITIC End of Year Review, 2009). Other commentator have noted this trend in terms of the knock-on effects of falling market demand (Enz, 2009; PriceWaterhouseCooper, 2008). As such, it is prudent to examine the nature of these events and attempt to articulate how their consequences have, are having and will continue to have an impact on day to day economic life for the foreseeable future. Therefore, the purpose of this research is to explore those factors that have succumbed Ireland’s Hospitality and Tourism industry to the deleterious effects of a global economic crisis. Given the proliferation of analyses and reports explicating the causes and consequences of economic crisis by both national and international agencies, and further buttressed by commentary from the relevant stakeholders and representative hospitality and tourism groups in Ireland; this study sought to focus, albeit in a minor scale, on the ‘real, lived experiences and personal reflections’ of a representative group of hotel managers on the frontline of Irish hospitality.

Literature Review

Without doubt, the tourism industry has a significant contribution to an economy. As Meethan (2001, p.43) asserts, “the appeal of tourism as a means to generate wealth appears to be an attractive proposition, due to its seemingly exponential growth and its potential as an invisible export earner.” Similarly, “tourism has flourished across the world because of its perceived benefit: it is heralded as the world’s largest industry” (Page and Connell, 2006, p.343). According to its economic impact report, the World Travel and Tourism Council (2009) asserted that Travel & Tourism employed over 225 million people around the world and generated 9.6% of global GDP in 2008. For Ireland, the hospitality industry is a vital source of revenue, employment and regional development. It is one of the country’s largest service sectors contributing nearly 7% to overall services exports and where the majority of enterprises are indigenously owned (ITIC, 2008). As Fáilte Ireland (2009) indicate, domestic tourism in 2008 saw a total of 8.3 million trips taken within the Republic by Irish residents, with an associated expenditure of €1.5 billion. Furthermore, total tourism revenue was €6.3 billion, including €4.8 billion total international earnings. In 2007, approximately 250,000 were employed in the tourism sector where employment in the accommodation and food sector alone accounted for nearly 130,000 jobs. Further, direct tourism spending amounted to 4% of GNP or 3.4% of GDP (CSO, 2009). However, the figures for 2009 and going into 2010 do not belie the detrimental effects the recession is having on the country and sector (ITIC, 2009; TRG, 2009). For example, recent evidence notes that there has been a dramatic fall in overseas visitors coming to Ireland with reduced numbers affecting some of the country’s best cultural and heritage sites (CSO, 2010; Sunday Independent, May 2010). The question is: in what way has the current crisis impacted the hospitality industry? Therefore, an initial appraisal of the overarching contextual factors reportedly antecedent to the downturn must be noted.

Global Forces

In general, commentators agree that global developments over the past thirty years have, in some part at least, cumulatively influenced the current economic situation. According to OECD research, it is difficult to pin-point one or more factors that gave rise to the crisis. However it is acknowledged that “the interactions of several markets, regulatory and macro-economic policy failures” played their part (Furceri and Mourougane., 2009)

such that “global capitalism has entered the deepest recession that it has ever experienced since WWII” (Allen, 2009). It has also been suggested (Gilpin, 2001; Ferguson, 2008) that the nature of the current crisis is the product of the far reaching consequences of the neoliberal economic policy prescriptions advocated in the Washington Consensus of 1989¹. Gilpin (2001, p.6) observes that, “since the mid-1970s, financial deregulation, the creation of new financial instruments and technological advances in communications have contributed to a much more highly integrated international financial system.” Dowd (2000) notes that a growing financial industry emerged in response to the growing importance of monetary finance, enormous increases in personal, commercial and government debt, the expansion of insurance companies, individual financial investors and the development of global financial speculation.. As Allen (2009, p.63) cogently puts it “capitalists re-branded themselves as ‘innovators’-the source of dynamism...and above all, the ability to take risks that would generate wealth for all”. What develops is what is customarily referred to as an overheated economic system or ‘*an overheating economy*’. Consequently, as national economic systems became more closely aligned and interdependent in terms of trade and finance, the volatility of financial capital flows becomes the most “unstable aspect of the global capitalist system” (Gilpin, 2001, p.7). Accordingly, “the process of globalisation and financial development has been prone to crises” (World Bank Policy Research, 2008, p.3).

Domestic Forces

An important point to note is that the problems affecting Ireland relate to a combination of imprudent domestic and international policy structures during a period of unprecedented economic growth (Bergin, Conefrey, Fitzgerald and Kearney, 2009). Honohan (2010) in his report into the causes of the financial crisis, further emphasises that the interdependencies between government economic policy, aggressive lending behaviour and excessive construction development during the decade, exacerbated the crisis in Ireland. During the first six months of 2009, a number of reports were presented detailing the state of the Irish economy in the context of the economic crisis. The chronological starting point for these analyses was the previous year, 2008, during which

¹ The ‘**Washington Consensus**’ refers to a term describing a set of policy prescriptions set down by the World Bank and IMF in 1989 to deal with the economic and structural problems of Latin American nations. Policies included: Fiscal Discipline, Tax Reform, Interest Rate Liberalisation, Trade Liberalisation and Market Deregulation. Later developments in the global financial markets were linked to the excessive application of these ‘free market’ policy instruments in advanced economies which increased risk exposure in various investment markets and financial products

time, key economic and Sectoral indicators across the nation began to display rapidly deteriorating performance (see: ESRI, 2009; FTI Consulting, 2009; World Bank, 2009 and IMF, 2009). Further, “a combination of the domestic housing bubble unwinding and a world financial crisis has particularly unpleasant consequences for the Irish economy” (Bergin et al., 2009, p.2).

The National Economic & Social Council produced a report which argued that Ireland faced a five-dimension crisis: *a banking crisis; a fiscal crisis; an economic crisis; a social crisis* and *a reputational crisis* (NESC, 2009a). The crisis in terms of declining national output, reduced consumer spending and increased savings levels; rising unemployment figures, sharp decline in government revenues and falling prices was described as a ‘relatively new economic phenomena’ (NESC, 2009a p.11-16; ESRI, 2009). Further, as Sweeney (2009) asserts “the economic reality is that there is not enough business to support the number of retailers that have developed around a spin-off from the lending boom” (p.16). Collectively, these dimensions represented not only the scenarios besetting Ireland, but most other developed economies in Europe and North America. As the International Monetary Fund claimed, “no country escaped the reach of this economic storm.” (IMF, 2009). Clearly, the qualitative aspects described in the five dimensions highlights the degree of interdependence within the general economic system. If one dimension falters, there follows a knock-on sequence of events that impact all aspects of the country, in this case, the Hospitality and Tourism industry.

In totality, the effect of the downturn has highlighted the manner in which the competitiveness of both the national economy and the hospitality sector declined (ESRI, 2009; NCC, 2009). Issues relating to price, labour costs, utility costs and excess hotel capacity have been compounded by constrained access to finance from the banks (Bacon, 2009; NCC, 2009).

Study Methodology

A qualitative, inductive approach served as the research method for this study. According Auerbach and Silverstein (2003, p.3) “qualitative research is research that involves analysing and interpreting texts and interviews in order to discover meaningful

patterns descriptive of a particular phenomenon”. Similarly, not only can qualitative methods be used to uncover and understand what lies behind any phenomenon about which little is know, it can also be used to gain new and fresh insights into issues about which quite a bit is already known (Strauss and Corbin,1990; Creswell, 2009). Furthermore, it is argued that analytical approaches founded on qualitative grounds can be used for causal explanation (Maxwell, 2004).

Eight semi-structured interviews were conducted with a convenient, purposive sample of hotel managers in the Limerick, Shannon and Clare region (Table 1). Hotels were selected as the primary data source given the importance and prevalence of such establishments in the region and represent good barometers in terms of reflecting the deleterious impact of the crisis within the hotel sector and hospitality industry in general. All interviews took place in the participant’s establishment over a two and a half month period between February and May 2010. An interview protocol was generated to address the underlying objectives for this study. Six open-ended questions were created to reflect issues relating to the recession, its impact on hospitality industry. This interview approach allows each informant to be asked similar questions and their responses analysed for comparative purposes (Creswell, 2009) and is a flexible approach allowing the interviewer to modify the order and details of how topics are covered relating to emergent themes (Bernard and Ryan, 2010). Participants were contacted via e-mail and follow-up telephone calls to explain the objective and purpose of the study and possible voluntary participation. Prior permission to record the interviews was agreed and assurances of anonymity and confidentiality underpinned the strictest of ethical considerations.

Table 1: Interview Details

<u>Hotel Grade</u>	<u>Frequency</u>	<u>%</u>
Three Star	4	50%
Four Star	3	37.50%
Five Star	1	12.50%
<u>Manager Gender</u>	<u>Frequency</u>	<u>%</u>
Female	2	25%
Male	6	75%
Average Industry Experience:	15 Years	
Interview Length:	Minimum:	27 mins
	Maximum:	66 mins
	Average:	35 mins

All interviews were self-transcribed verbatim within a two day timeframe using a word processor in order to build-up a core database file for the coding process. Interview transcripts, spanning forty five, one and a half line spaced pages constituted the final data base 'master file' for analysis. To assist with the coding process, the master file was exported to a computer assisted qualitative data analysis software (CAQDAS) programme, QDA Miner (v. 3.2). This programme aided the management of the interview text by facilitating the coding process for the purpose of theme creation. Thus, any codes, categories or points of interest associated with the text were all located in one central 'code book' from which sample text bites could be recalled quickly and allow emergent themes and processes to manifest.

Analytical Techniques

Two complimentary frameworks fortify the qualitative analysis:

- i. A General Inductive Analysis Approach;
- ii. Process Theory.

The general inductive analysis approach, according to Thomas (2006, p.238) "is a systematic procedure for analysing qualitative data in which the analysis is likely to be guided by specific evaluation objectives". This approach facilitates the development of a model about the underlying structure of experiences or processes that are evident in the data based on emergent categories and themes (Thomas, 2006). Process theory deals with events and the processes that connect them and "is based on an analysis of the causal processes by which some events influence others" (Maxwell, 2004, p.248). It also "lends itself to the in-depth study of one or a few cases or a relatively small sample of individuals and to the textual forms of data that retain the chronological and contextual connections between events" (Langley, 1999, 2004; Pentland, 1999). Bernard et al (2010) suggest a five-stage framework by which processes can be explicated from qualitative data: **1)** the event itself, **2)** the immediate triggers (environmental, social etc) that led to the event; **3)** the larger historical context in which the event was based; **4)** the immediate response or reaction to the event; and **5)** the event's long-term consequences. The following coding process was applied in light of the research objectives:

- i. Two preliminary readings of the master interview file to enhance familiarity with the raw data;
- ii. Detailed reading of responses to each of the six interview questions;
- iii. Coding of the text for the creation of general categories using actual words/phrases (*in vivo* coding);
- iv. Identifying possible ‘linkages’ and ‘overlap’ between codes/categories;
- v. Organising and grouping general categories reflective of a specific, emergent theme or themes

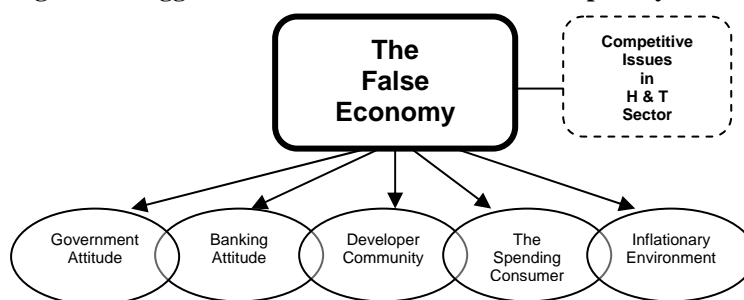
Qualitative Analysis Findings

A good level of consensus emerged from the analysis. This facilitated the visual representation of the key issues and processes that affected and are affecting the industry currently. Each part will be discussed separately. See Figure 4, Appendix I for the full extracted model. Furthermore, the inductive analysis generated a ‘higher-order emergent theme’ from the raw data.

Process Model: Triggers

Figure 1 below describes the triggers extracted. Almost all participants were agreed upon the causes of the current crisis. Approximately five inter-dependent fault line factors were derived. Taken together, these factors underpinned what the author termed ‘The False Economy’, indicative of the apparent success and rising pressures that emerged in the economy at the time.

Figure 1: Triggers to the Current Crisis in the Hospitality Industry



- The attitude and role of the Irish Government

The Irish Government and general political leadership featured prominently as a principal source of the current problems and fuelling a culture of investment incentivisation.

Issues such as short-sightedness and lack of planning and control in the economy were cited as fundamental aspects of poor governance. The following quotes elucidates this:

“I suppose from the government's point of view they were looking at it from a very short term perspective...helping with building infrastructure but they never really looked at it from a long term view”

“politically we were rudderless as we allowed unnecessary hotels to be built”

“Tax, tax breaks for them (developers) basically...from the government”

- The attitude and behaviour of the banks

Equally sourced as a cause to the problems were the banks. Typically, all participants vehemently criticised the behaviour of the financial system and resultant financial environment.

“banks lent without putting in the normal economic parameters on people”

“the banks were fláthúilach, naïve, and were just throwing money at people”

“The banks needed an area to give loans, money to generate income, interest, revenues and so on. It was a damn good example of creating a bubble”

- The actions and influence of developers

Concomitantly with the Government and banks, the construction industry and resultant developer culture was targeted with severe criticism by the participants. These three quotes highlight the impact of the property development culture at the time.

“(developers) were given the opportunity to build property and to claim tax back and virtually build a premises without any outlay basically. To grow their empire let's say!

“But they were not business motivations, not hotel sector business motivations”

“And let's say that hoteliers were not being hoteliers...you know...builders were being hoteliers and that's the recipe for disaster really.”

- The relatively loose culture of spending that pervaded at the time

Reflecting the mood of the time that was ‘The Celtic Tiger’, reference to the ‘have money-will spend’ idea of success was identified by the participants. A culture of spending became conventional wisdom and accepted practice, not only by the public, but an attitude that seemed to permeate the hospitality sector also.

One participant noted that the hotel was caught-up in the concept of spending for spending's sake: *“Basically it was ...well, we have this money so let's just spend it”*

“Back then, when the boom time...hotels were full because people working on the construction site had plenty of money and would take the family away at weekends. They could go away on a break.”

“I think we drifted into total consumerism for the sake of consumerism”

- An inflationary environment

A final category linked to the triggers of the crises is very much a consequence of boom that encapsulated the apparent economic success, that of the prevalence of an inflationary environment. Many of the interviewees cited the general affluent aspects borne of the Celtic Tiger era impacting on price/wage/costs increases. The encouragement to spend, buy and invest like no tomorrow reflected the senseless lack of proper, measured advice from the principal agents in the economy.

“Ireland had become a very expensive country to do business in and hence businesses were closing and moving to lower cost countries such as the Eastern European countries”

“Maybe there was a false economy there with the rates being charged in some regards were too high. Our average room rate was always around €75-€80 Euro which was not massive. Some places you would go you would be paying phenomenal money. People were paying it and not questioning it”.

“Wages were increased you know. The minimum wage was a difficult thing for us...trying to balance out the private and public sector differences”

Process Model: Immediate Reactions & Challenges

The inductive analysis revealed five manifest factors that expound the issues currently facing the industry, particularly credit facilities, cash flow issues and the bottom line.

These were:

- Cash flow Problems

“Well established hotels and good businesses are...to a point they don't have any cash flow. Cash flow is the problem right now. They may have business but they can't get over the quiet month essentially.”

“There's a knock-on effect there because if you can't get credit to sustain your capital cash flow, you're stuffed at the same time.”

“Cash management is the most important thing you will do now and it is a constant struggle.”

- A new and altered consumer market

“there is less discretionary spend available to these people....maybe people still have some money in their accounts, but there is a fear factor, nobody knows what is around the corner.”

“What's happened from a business point of view is a massive lack of confidence from consumers.”

“The whole situation has grounded a lot of people. I think people had their head in the air. I think the Irish people had changed a lot but I think that now it has grounded people and that's not a bad thing.”

- A burgeoning capacity issue

Ultimately, the combination of laissez-faire, tax-incentive driven policy laid out by Government had the eventual impact of creating not only a property bubble economy, but an increase in the number of hotel establishments that were built by investors during a ten year period, up to 2008. Not only was this an antecedent to the unfolding crisis, it remains a critical legacy of a time of uncontrolled excess.

“There were far too many hotels coming to Ireland being built in locations that could not sustain them, going forward, in bad times. In good times everyone had money to spend and there was no issue”

“There is an over-supply of rooms in Ireland at the moment...a huge amount and honestly, it's got a knock-on effect along the whole way”

“Every single hotel chain now in the world are almost based in Ireland with the exception of some”

“Certain properties are going to have to close.”

“You've had attrition in the market (hotel sector):”

- A 'Rates War' among competitors;

“And then with other hotels undercutting you, basically going 'bottom dollar', it's a price war out there you know between hotels. It's scrupulous, is the word I'd use to describe what's going on.”

“Rates have just plummeted and as time goes on it is just unsustainable.”

“I did a room rate analysis recently and if you look at the rates being charged...it's just ridiculous...you wonder how long this will continue.”

“What's happened now is that price-cutting in the domestic market is extraordinary...it's below cost selling and it makes absolutely no sense.”

- NAMA Land and (those Banks again!)

“we are competing with these hotels around the country that are managed effectively now by banks and developers.”

“There are one or two hotels in the area that are bank-owned, so you're competing against a bank that doesn't have to make profit (hotel profit) and that is purely wearing down the years until it has hit the extent of its tax advantage of building on that seven year period.”

Process Model: Long-Term Consequences & Opportunities

The final element of the model focuses on the ultimate effect the crisis is currently having on the hospitality industry. Accounting for both the antecedents of the problem and its immediate to short term reaction from the industry, it remains quite clear that all businesses are now trying to survive in a very different operating environment. From the raw data, the overriding objective is ensuring the business emerges from the recession in a better position to compete and ultimately survive in a changed market place. Most participants referred to the importance of re-thinking basic business fundamentals in terms of efficiencies and reduced wastage. The two key challenges for the business and sector as a whole include strict cost control systems and re-appraisal of work practices [Figure 2].

Figure 2: Long-term Consequences/Opportunities for the Operational Environment



Typical responses include:

“Everything now is looked at from amenities in the bedroom from linen to waste management to responsible business to am... from how much polish we're buying a week to polish a table to types of coffee we're buying...you know...across the whole spectrum has been looked at.”

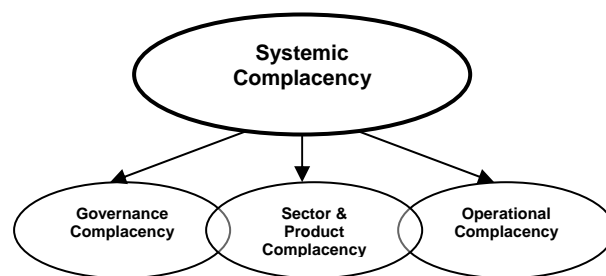
“It's just trying to keep your costs under control has become a huge aspect of the business for us you know.”

“It has been extremely difficult and we have worked very hard to get our other costs down. With people in private enterprise, all our services are prepared to work with us in getting a 20-30% reduction in costs.”

Higher-order Emergent Theme: Systemic Complacency

The inductive data analysis revealed a major underlying theme that seemed to explicate not only the structural processes associated with the current crisis, but also a subliminal appraisal derived from participant responses. The issue of complacency manifest itself within and between participant responses to various aspects of the crisis. On further inspection, the author identified that ‘*Systemic Complacency*’ suffused most if not all respective agents and stakeholders linked to the unfolding crisis of the last two years and before. Figure 3 depict the higher-order theme that emerged from the raw data. Based on interview data, three forms of complacency appear to have been prevalent and consequently exposed during the initial weeks and months of the crisis: complacency in governance and regulation, complacency within the H & T sector and, complacency with the management/control of the business operation itself. Though separate in form, these manifestations of a complacent attitude to things are irrevocably linked.

Figure 3: Higher-order Emergent Theme - Systemic Complacency



The following quotes support this contention:

Governance Complacency:

“the political leaders that were there, they obviously saw it coming and decided not to make any changes”

“from a hospitality point of view, the main causes in the hospitality end of things has been a lack of proper strategic planning from the part of government and government agencies.”

Sector/Product Complacency

“I do think that we have forgotten a basic economic principle and that comes down to that we need to produce something profitably or at least at break-even that people want to buy.”

“..we rested on our laurels, we were happy with the numbers coming in. In the last ten years, we were used to a model of airlines (90% of our tourists come in by air) so we're reliant on the airlines.”

“Basically, they've had about thirty years of sitting back; creating the products in the first place and becoming complacent over business walking through the door.”

Business/Operation Complacency

“Whereas in that 10 year period we really did become quite lax with regard to costs and we probably could have saved a lot more in those years”

“we look at everything now....top to bottom”

Conclusions and Future Research Directions

The purpose of this study was to explore the issues and challenges facing the hospitality industry based on the personal reflections and experiences of hospitality professionals, specifically, hotel managers. The central objective of the research was to provide a platform for these individuals to offer their reflections and accounts on the ‘state of the nation’ with respect to the hospitality industry in the current economic climate. An inductive analysis of eight interview transcripts revealed a high incidence of consensus regarding certain environmental factors that facilitated and contributed to a difficult operating environment over the past number of years and expressions of concerns for the immediate future.

One of the key findings that emerged for the analysis was the issue of complacency relating to governance and regulation, the tourism sector and product profile, and management inefficiencies that seemed to pervade the system during the time of the ‘Celtic Tiger’. The sense that we just became too comfortable with things on many levels within the economy serves as testament to the culture of myopia that was perpetuated by a combination of questionable government policies which fuelled excessive financial and construction environments. Based on the interview data, participants’ appraisal of the crisis can now only be described as the presence of a ‘False Economy’ during the past ten years. This study’s findings echo the findings of research that previously investigated the causes of the recession (see: Bergin et al., 2009; NCC, 2009; Bacon, 2009; ITIC, 2007; Tourism Renewal Group, 2009). Overcapacity, falling

room rates, price wars, increased competition from establishments that are controlled by non-hotel institutions; collectively reflect the challenges befalling the sector. Balancing reduced revenues and strained cash flows on the one hand, and maintaining service standards with improved workplace efficiencies on the other, is the new mantra going forward. In one sense, these are seen by some as opportunities that have emerged from the crisis. As one participant noted: *“we now see the need to monitor what we do more carefully. We really didn’t do properly before”*.

The use of various qualitative analyses in this study added greater analytical depth that would otherwise have been absent by other means. The key word is ‘reflection’. The author believes that only through careful reading and interpretation of personal experience can the heart of a phenomenon be understood. A larger sample profile from other representatives along with hoteliers would have been advantageous. Due to sample size, the research findings should not be interpreted as universalistic. It is recommended that a follow-up study of these same participants and extending the sample profile and size in the near future would be a worthwhile exercise to unearth new issues. However, the level of consensus within and between participants supports the notion that similar experiences are prevalent throughout the industry. Furthermore, the subjective nature of inductive analysis to investigate causal processes lends itself to issues of validity and reliability to which this research must be further scrutinised (Maxwell, 2004).

In terms of its impact on Irish hospitality and tourism, the current crisis has in effect forced a re-think of basic fundamentals across all levels of the economy and society. It has ‘grounded’ people and institutions and maybe this is a new opportunity to do the right thing this time. According to the Tourism Renewal Group: *“The greatest insightis the extent to which the sector is taken for granted, principally I believe because tourism is embedded as an activity in every town and parish in Ireland... If it receives the recognition and support its scale deserves, it stands ready to play its part in our journey to recovery.”* (TRG, 2009).

Finally, as one participant noted:

“I suppose the Irish hospitality industry in terms of Irish Hospitality may have been lost during that time... but Ireland built its reputation on its warm hospitality...you know... the 'Thousand Welcomes'...I'd say was lost.”

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Appendix I

Figure 4: Full Extracted Process Model

