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Celtic Tiger growth creates a new breed of holidaymaker

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1. Introduction

Ireland has experienced phenomenal economic growth between 1995 and 2001 making it the fastest growing economy in Europe. Much has been written about the extent of the growth, the possible causes and the impacts. While tourism has been an important contributor to and benefactor of this growth, much less attention has been paid to this aspects of this important period of Irish economic history. This article focuses on one impact of high levels of economic growth in this regard, and that is changing holiday patterns of Irish people and in particular the phenomenon of holiday home ownership.

Section two of this article contextualises the study by briefly outlining the international literature on holiday homes and then discussing the performance of the Irish economy since the mid 1990s. The tourism industry is then investigated and the changes in terms of demand over the same period are described with particular reference to the increasing importance of holiday homes as an accommodation choice for tourists. Section three then presents the methodology of the case study which focuses holiday home owners in North Wexford. In the results in section four an insight is presented into issues such as what type of person purchases holiday homes? Why do they do so? How much do they use the house? What activities do they engage in while on holidays here? What are their future plans? Section four then analyzes the implications of these findings. This is a timely piece of research with increased recognition of the rising importance of this group in tourists in Ireland. Its findings contribute to the literature in this area but are also of interest to tourism policy makers, destination planners and managers and property developers.

2. Contextualising the research

2.1 Holiday home literature

Early literature on holiday homes concentrated on defining and conceptualizing the holiday homeowner (Cohen, 1974, Coppock, 1977; Jaakson, 1986; Girard and Gartner, 1993). Other studies have concentrated on analyzing the impacts of this type of tourist on the local area (Gill, 1999; Dasse and Aubert, 2000; Muller, 2001). While

holiday home ownership is not a recent phenomenon (Muller, 2001; Jaakson, 1986) there are increasing numbers of Europeans purchasing this type of property since the 1980s. Go (1988) attempted to quantify the extent of holiday home ownership estimating that at that time 35 percent of Italians, 16 percent of French and 8 percent of Swiss people owned holiday homes in their own country. Another 9 percent of Swiss, 8 percent of Belgians and 4 percent of French people owned holiday homes abroad.

Little research has been conducted into the traits and motivations of this group of tourists. One extremely interesting study undertaken by Chaplin (1999) explores motivation by interviewing a group of British people who purchased holiday homes in France. The issue of whether this group are the elite in society has also been pondered by some. Go (1988, p.20) notes 'holiday homes in Europe – especially those acquired for holiday and/or leisure purposes – have traditionally been the preserve of a small elite' and similarly Jaakson (1986, p.386) found 'holiday home owners [to be] visibly distinct from the local population and different in class, status, values, behaviour and attitude'. However as Go (1988) observed 'things are changing', and in 1999 Chaplin commented that 'the owners of second homes are by no means exclusively from the professional and managerial classes' (p. 43). This article seeks to contribute to the knowledge of the profile of this group of tourists by investigating holiday home owners in North Wexford specifically.

2.2 Rapid Economic growth

From 1995 to 2002 the Irish economy grew by an average of 9% annually making it the fastest growing economy in Europe. As well as discussion about the sustainability of this growth, there has been much debate on the causes of the growth with factors such as a rise in multinational investment into the state (Sweeney, 1998), EU funding (Barry, Bradley and Hannan, 1999), social partnership (McSharry, 2000) high growth in exports (Kirby, 2002) and even factors such as music and sporting success (Sweeney, 1998) being highlighted.

Attention has also been paid to the consequences of this rapid growth. To the forefront has been the debate about regional inequalities. The main indicator of disparity is in terms of the average level of incomes. Data from the Central Statistics

Office show that while disposable income per person has risen significantly in all areas, the Southern and Eastern region has grown by the largest amount and the gap that used to be between earning in Border counties and Southern and Eastern counties has risen from 12% in 1995 to 14 percent in 2001 (www.cso.ie).

From a social point of view it has been reported that the Celtic Tiger has resulted in a 'growing social polarisation between those who are benefiting from it and those being marginalised by it' (Kirby 2002). Nolan, O'Connell and Whelan (2000 p. 345) note that 'over the period 1987 to 1997 there was a substantial widening in earnings dispersion in Ireland', they observe that 'rapid increases for those towards the top of the distribution were the dominant force'.

Allen (2000: 60) believes that businesses have gained at the expense of workers. He defends this view using data from the central statistics office which shows that 'between 1990 and 1997, industrial profits have increased by 144% while wages have grown by 59%'.

2.3 Changing domestic tourism patterns

This period of high economic growth has also impacted on the tourism sector with a rapid increase in the amount of travelling that Irish people are engaging in. Many are choosing to spend their increased disposable income on holidays and this is evident by the number of trips that people are taking. There has been an 85 percent rise in the number of international trips between 1995 and 2003. While detailed data isn't available for domestic tourism before 2000 it is evident that there has been a 14 percent rise in the number of domestic bed-nights between 2000 and 2003.

Table 1: Rising trend of international and domestic tourism¹ (000s)

	Total no. international bed nights	Total no. international trips	Total no. domestic bed nights	Total no. domestic trips
1995	N/A	2,547	N/A	N/A
1997	N/A	3,053	N/A	N/A
2000	35,544	3,768	20,703	5,478
2001	37,953	4162	23,207	6,307
2002	40,660	4,597	22,222	6,452
2003	43,702	4,974	23,616	6,657
% change 2000-2003	22	32	14	21

(Source: CSO, National Household Survey and Travel and Tourism Statistics)

Although there is no data collected which shows the extent of holiday home ownership in Ireland the increasing importance of this type of property as an accommodation choice is evident in the CSO data which analyzes tourist accommodation choice. In both international and domestic tourism the increasing importance of holiday homes is clear. Between 2000 and 2003 there has been a 45% rise in the numbers travelling overseas to stay in their own holiday homes and even more strikingly at home there has been a 180% increases in the number of domestic tourism bed nights which are spent in peoples' own holiday home.

¹ This data was not collected before 2000.

In both cases tourism includes travel for business purposes as well as leisure as the data is not available for the distinct categories.

Table 2: Accommodation choice of domestic and international tourism²

Total domestic Nights	Total domestic nights 2000	Total domestic nights 2003	% change	Total international nights 2000	Total international nights 2003	% change
Caravan Camping	1,808	1,879	3	1,546	2,285	47
Guest House/B&B	2,275	2,067	-9	1,418	2,112	48
Own Holiday Home	1,082	1,572	45	500	1,410	182
Hotel/Conference Centre	4,689	5,762	22	11,090	12,260	10
Self-Catering/Rented House	3,090	3,754	21	10,298	13,494	31
Friends/Relative	6,594	7,175	8	8,421	9,055	7
Other	1,165	1,407	20	2,271	3,078	35

So the data shows that since the emergence of the Celtic Tiger Irish people are taking more holidays than before, an increasing percentage of total holidays are overseas, and that holiday homes are becoming a more important element in both domestic and international tourism.

While there has been much colloquial discussion about the trend of holiday home ownership and the impacts they have on the local area, to our knowledge no academic research has been conducted in this area with reference to Ireland. This article seeks to redress this balance. It seeks to provide some important information about this group of tourists. It addresses questions like what is the profile of holiday home owners? What are the motivations for holiday home ownership? What factors influence their choice of location? To what extent do holiday home owners contribute to the local economy? How often do they use their house? And finally what are their future intentions with regard to the holiday home? These are important issues of consideration for tourism planners and suppliers if the trend of increasing numbers of holiday home owners continues.

² This data was not collected before 2000. In both cases tourism includes travel for business purposes as well as leisure as the data is not available for the distinct categories.

3 Methodology

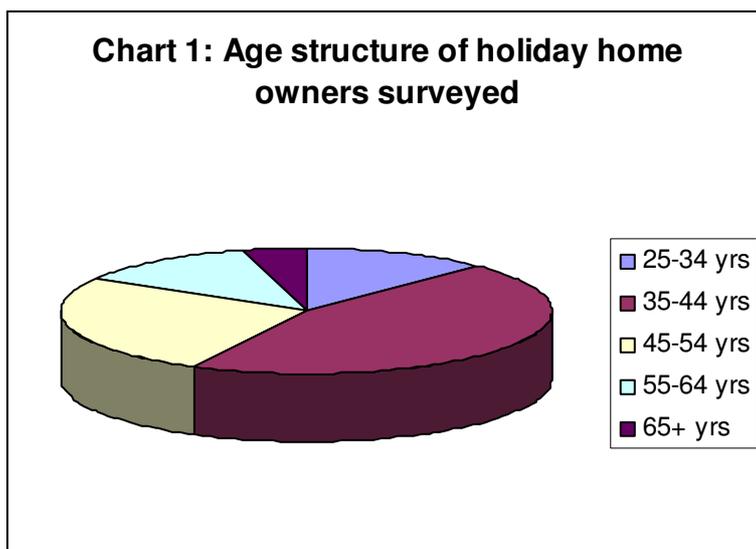
This survey was conducted in four places (Courtown, Kilmuckridge, Blackwater and Curracloe) in North Wexford during July and August 2001. It constitutes part of a broader study of the area which surveyed residents, tourists and holiday home owners. Participants were randomly selected in various locations. In total 76 holiday home owners were surveyed. In studying the sample it is clear that respondents have their holiday homes spread throughout the area, there is a good range of types of holiday home and gender responses are roughly 44 percent male and 56 percent female.

4. Results

4.1 Profile of holiday home owners

The first notable finding is that 82 per cent of those surveyed had only bought their holiday home in the last 10 years, and in fact 61 per cent had only made the purchase in the last five years i.e. since 1996 and during the years with the highest levels of economic growth. Thus although there is a history of holiday home owners in the area, the majority of this group are relatively recent additions.

The counties surrounding Wexford are where this group of tourists have their permanent home - 70 percent live in Dublin, Wicklow, Kildare and Waterford, with Dublin being home to the majority 53 percent. A significant proportion - 84 percent - of the group is aged between 25 and 54 but perhaps surprisingly the biggest single category, 45 percent of respondents, are aged between 35 and 44. This would indicate that this type of purchase is occurring relatively early in life where in times of less economic prosperity such decisions may have been made more commonly by the older age group.



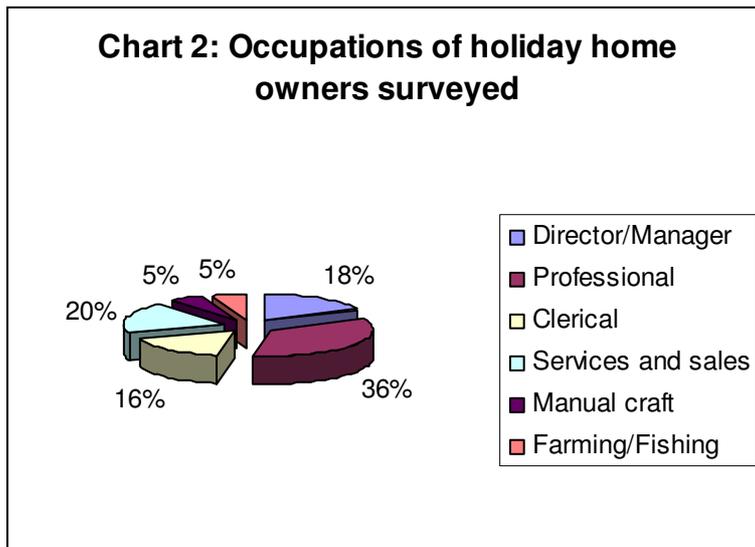
Income and occupation data show some surprising findings. It is often assumed that those who own holiday homes are in the high income bracket however this survey shows that 22 percent of respondents had a household income of up to €31,750 (£25,000) and 52 percent earned less than €48,260 (£38,000) (see table 3).

Table 3: Income levels of holiday home owners surveyed

Income (€)³	Percentage of sample
< 15,875	1.7
15,876.27 – 24,130	1.7
24,131.27 – 31,750	18.3
31,751.27 – 40,640	23.3
40,641.27 – 48,260	6.7
48,261.27 – 55,880	18.3
55,881.27 – 63,500	25
63,501.27 +	5
Total	100

In terms of occupation 45 percent categorize themselves as professionals or director managers while a further 45 percent are clerical, technical professionals or involved in services and sales.

³ Note that when the study was undertaken the income levels were listed in IR£



Thus the image of second home ownership as being concentrated among very high income earners who are directors and managers of companies does not seem to reflect the full picture in this case. This finding is similar to that of Chaplins (1999) as discussed in section 2.1. It seems that the higher levels of economic growth over the last decade has made this type of property a possibility for the middle classes. This perhaps supports the idea (Nolan et al, 2000) that the greater gap between rich and poor in Irish society since the Celtic Tiger is primarily as a result of those in the middle classes attaining more wealth and so becoming increasingly polarised from those who have the least. Holiday home ownership trends exemplify this increased divergence.

4.2 Why did they buy a holiday home?

Chaplins (1999) qualitative study of British holiday home owners in France outlined how factors such as getting away from the stress of everyday life and peacefulness were important reasons for the decision to purchase their holiday home. As table 4 shows this finding is mirrored in this group, with 'as a place to escape from everyday routine' and 'as a place to relax' being ranked as the most important reasons by 42 percent of respondents. Interestingly only 12 percent purchased their holiday homes as an investment⁴.

⁴ This may reflect the fact that most investment in holiday homes in Courtown would have been under the Seaside Resort Areas Scheme and part of the requirements of this scheme are that the investor cannot spend more than one month in the house. This reduces the likelihood of this type of owner being part of the sample.

Table 4: Rank in order of importance why you decided to buy a holiday home?

	Ranked 1
<i>As a place to escape from everyday routine</i>	9
<i>Was a regular visitor and wanted to own property here</i>	9
<i>As an investment</i>	9
<i>As I plan to retire to this area</i>	5
<i>As a place to relax</i>	21
<i>To give the children more freedom</i>	6
<i>To have a place to spend quality time as a family</i>	9
<i>To experience a different mode of life</i>	1
<i>Other</i>	1
<i>Total</i>	70

4.3 How did they choose the location?

When it comes to deciding where to buy their holiday home the most important attribute as ranked by 55 percent of those who responded to this question (n=56) is the closeness of the beach. Also relevant was the price; in 21 percent of cases this was the most important factor.

Table 5: Factors which affected choice of area to purchase holiday home

<i>Which of the following best describes why you chose to buy your holiday home where you did? (Rank in order of importance)</i>	<i>No. of respondents who ranked 1</i>	<i>No. of respondents who ranked 2</i>	<i>No. of respondents who ranked 3</i>
<i>Closeness to the beach</i>	31	8	7
<i>The price was right</i>	12	9	8
<i>I have family connections in the area</i>	4	6	7
<i>I have family/friends who have a holiday home here</i>	6	6	3
<i>Nearness to Dublin</i>	5	18	7
<i>The availability of recreational facilities in the area</i>	2	3	5
<i>I used to come here on holidays as a child</i>	7	7	7
<i>The scenic quality of the area</i>	4	11	12
<i>Cultural and historical attractions</i>	1	1	2
<i>The peacefulness/quietness of the area</i>	5	5	14

This data provides us with insight as to the factors which influence the choice of where to purchase a holiday home. Clearly the beach and price are important factors but also note that 32% of respondents saw closeness to Dublin as an important consideration, even if not the most important factor in their choice. Similarly scenic quality of the area and peacefulness of the area while not ranked number one by a high number of respondents appear frequently in the second and third level rankings.

4.4 How often do they use the home?

A negative impact of holiday homes is that these houses can be left empty for the majority of the year especially in the winter – a proliferation of holiday homes [can turn] the resort into a “ghost town” in the winter’ (Kilkee Chamber of Commerce as cited in Deegan, 2002). However as the table below shows in this study 58 percent of respondents use their holiday homes 'most weekends year round'. This may reflect the closeness of this area to Dublin where most of the holiday home owners come from making it easily accessible for weekends.

Table 6: Usage of holiday home

<i>Approximately how often do you use your holiday home during the year?</i>	<i>Percentage of respondents⁵</i>
<i>Most weekends year round</i>	58.4
<i>2-3 weeks during the summer</i>	27.8
<i>Bank holiday weekends</i>	4.2
<i>All summer (2-3 months, school holidays)</i>	15.3
<i>Most weekends between March and October</i>	11.2

Historically in this area many mothers and children who owned holiday homes and caravans or mobile homes would spend all summer in Wexford. Industry sources have noted that this pattern has changed (Mottiar and Quinn, 2001) with more women working outside the home and this trend is also clear in the data with only 15.3 percent of respondents spending all summer or children's summer holidays in the area. Also interesting is the fact that only 27.8 percent of the owners spend 2-3 weeks here during the summer. This implies that the majority of this group take their main holiday somewhere else and use their holiday home primarily for weekend breaks.

4.5 It is a lifestyle thing

When asked in an open style question what the main differences between life in the holiday home and life in their permanent home is, 21.7 percent of respondents said ‘stress free’ while a further 27.5 percent said ‘relaxing’. It seems that the holiday home offers a different lifestyle.

More detail on this issue is provided by the responses to a question with predetermined answers which compared permanent and holiday homes. As table 7 shows, the majority of people found themselves more relaxed, having more leisure time and spending more time engaging in recreational pursuits and with family in the holiday home.

Table 7: Comparing lifestyle issues in the permanent and holiday home

<i>Question</i>	<i>Valid percentage of respondents</i>		
Where do you tend to:	In my permanent residence	In my holiday home	Not applicable
<i>Feel more relaxed</i>	5.5	77.5	17
<i>Have more leisure time</i>	4.5	93	3
<i>Feel the children are more carefree</i>	10	65	25.5
<i>Spend more time engaging in recreational pursuits</i>	10	80	10
<i>Feel more ‘at home’</i>	36	30	34.5
<i>Spend more time with your family</i>	23.5	60	16
<i>Feel closer to nature</i>	10	78	12
<i>Lead a healthier lifestyle</i>	29	51	18.5
<i>Feel happier</i>	12	51	36

4.6 Activities while in the holiday home

Reflecting the importance of the beach in the decision of where to purchase the holiday home, this sample indicated going to the beach as one of the main activities that they enjoy while in the holiday home. Equally as important in the summer, and more important in the winter, is walking. Evening activities include going to the pub (26 percent of respondents said that this was their main evening-time activity in the

⁵ Some respondents gave a number of different time periods they used the house so the total does not add to 100%

winter) and eating out. These activities mirror those of regular tourists, and indeed many residents.

4.7 Contribution to the local economy

Detailed examination of tourist expenditure shows that in fact holiday home owners have the highest levels of expenditure on an annual basis. Mottiar (2002), based on data collected from this sample, shows that even including the cost of accommodation holiday home owners are spending three times more than the average of other tourists on an annual basis as they are spending more time in the area.

Table 8: Average total expenditure according to accommodation choice

<i>Accommodation</i>	<i>Daily Expenditure (€)</i>	<i>Average stay</i>	<i>Average total expenditure (excluding accommodation €)</i>	<i>Total expenditure (including accommodation €)</i>
<i>B & B</i>	67.48	7	472.36	650.16
<i>Rented house/apartment</i>	99.42	7	695.94	1,270.27
<i>Hotel</i>	89.95	9	809.55	1,495.35
<i>Visiting friends and relatives</i>	63.02	6	378.12	378.12
<i>Visiting friends and relatives on holiday here</i>	116.42	11	1,280.62	1,280.62
<i>Rented caravan</i>	60.62	6	363.72	690.30
<i>Own mobile home</i>	41.58	5	207.90	1,350.90
<i>Holiday home</i>	58.92	63	3,711.96	3,711.96

The daily expenditure of this group differs from other types of tourists as they spend a relatively low proportion of their daily expenditure on meals and drinks and entertainment and instead spend more on groceries and miscellaneous items (Mottiar, 2002). This category of expenditure includes goods that people buy in their holiday home area even though they will primarily use or consume them in their permanent home. Three examples cited were a car, meat to be frozen and used during the winter and hairdressing services.

As well as the types of good they purchase what is interesting when analyzing expenditure data is how much of this expenditure remains in the local area. It is notable that 74 percent of holiday home owners always or mostly purchased their groceries in local supermarkets, a significantly higher proportion than any other group. In the case of those that engaged in renovating their holiday homes, more than 70 percent of suppliers, contractors and workers used were from the local village or North Wexford area. Thus there appears to be little leakage of holiday home expenditure.

Table 9: Level of local spending on groceries

Percentage of respondents who said always or mostly

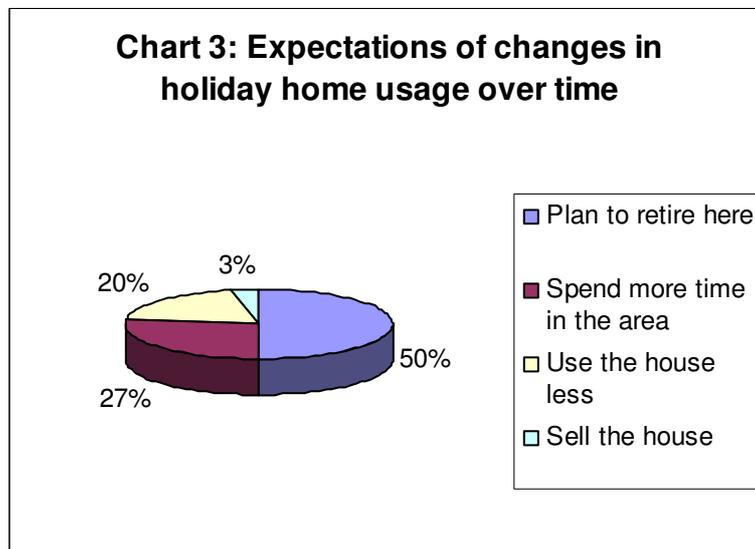
<i>Accommodation choice</i>	<i>Local supermarket</i>	<i>Supermarket in Wexford</i>	<i>Supermarket in Gorey</i>	<i>Supermarket before you come to Wexford (e.g. Dublin)</i>
<i>Rented house/apartment</i>	55.8	18.5	54.7	16
<i>Staying with friends/family who live here</i>	14.3	66.6	55.5	71.4
<i>Staying with friends/family who are holidaying here</i>	50	25	0	25
<i>Rented caravan</i>	65.2	5.3	30.4	15.8
<i>Own mobile home/caravan</i>	69	10	22	12.5
<i>Own holiday home</i>	74	25.9	17.9	17.5

It is clear that this group is making a significant contribution to the local economy although some sectors are gaining more from their expenditure than others.

4.7 Future plans

When asked whether they envisaged use of their holiday home changing over time there were 30 responses 15 of whom said that they planned to retire here, eight who intended spending more time in the area, six who thought that they would use the house less and one who was planning on selling the house. Of those that are considering retiring to the area 46 percent are planning early retirement. These results

would imply that areas which are popular for holiday homes now may be looking at a future where there is an increasing proportion of older full-time residents.



5. Analysis and implications

5.1 Impacts for tourism destinations

Some tourist destinations have an increasing number of holiday homes in their areas. This research shows that this can change the destination in terms of the types of goods and services that are viable. People staying in holiday homes spend a smaller proportion of their money on meals and entertainment while in contrast there may be more demand for goods such as DIY products⁶. It also has implications for the area in terms of reducing the amount of transient tourists - more holiday home owners means more repeat tourists and more steady business. Again this can be good for some suppliers and not for others. One of the surprising factors however might be the fact that on an annual basis this type of holiday maker can actually contribute more to the local economy than a 'regular' tourist. This counteracts the common view of the holiday home tourist as one who fills his or her boot before coming to the area and then not purchasing anything in the area during their stay.

The information regarding when the holiday home owners use the property show that seasonality isn't such an issue for destinations who rely on such tourists as they

appear to visit throughout the year. (In fact some holiday home owners mentioned that they prefer not to stay during the peak time when the area is very busy.) This can be good for the area in terms of a more regular stream of income and it may also make some local services more viable as the local population is enlarged as a result of these regular visitors. However in some cases the residents of destinations prefer to have a defined period of time in which tourists visit; one Courtown resident commented ‘ I like to see them [tourists] come, but I like to see them go’ (as cited in Mottiar and Quinn, 2001). It is notable that the amount of time these owners spend in their holiday home may be particular to this area and reflect its closeness to Dublin. Nonetheless the image is far from the ghost town and houses with their lights off all winter.

5.2 Long-term implications for destination could be ageing residents

As chart 3 shows about 50 percent of people see the use of their holiday home changing as they retire and it becomes their permanent residence, and a further 29 percent of people see themselves spending more time in their holiday home as they get older. This has implications for the local area, as Casado-Diazs’ work in Spain (1999) showed the impact of many British people choosing to retire to Torre Vieja significantly changed the age and educational profile of the area. Other implications can be more pressure on local services, in particular health services. Also if enough people start to live in the area rather than holiday there then the nature of the place begins to change. An interesting sociological issue in this regard is the place of these individuals in the local society from being holiday makers to holiday home owners to becoming residents. How these roles are transformed and whether they ever really become fully integrated and accepted local residents by the local community would be an interesting avenue of research⁷.

5.3 Implications for areas trying to attract holiday home owners

This research indicates that holiday home owners may be an attractive type of tourist for some destinations. Per capita they bring in more money, the income is more regular and as a regular visitor they may have more affinity with the area. It is interesting to note that attractiveness of an area for potential holiday home owners

⁶ This can be exemplified in Blackwater where two shops in the village now stock DIY materials.

⁷ Mottiar and Quinn do investigate this issue somewhat in their 2002 article which looks at the role holiday home owners in Courtown have played in the development of the local area.

centres on natural factors which cannot be recreated. In this study the most important were closeness to the beach, scenic quality of the area, the price was right and proximity to Dublin. From a policy point of view an area that wants to attract this type of tourist therefore has limited scope as aside from price the other factors simply exist or not. It must be noted however that some of these factors may have been particular to this type of holiday home owner as all of these people have selected this coastal area, this factor may not be so important for others who own holiday homes in other areas. As coastal properties become more expensive - 'waterfront property [is] the most sought after' (O'Keefe as cited in Mulcahy (2004)) - the price factor may come more into play as people look further a field to find a property that is in their price range. Interesting reading for destination planners who might wish to attract the holiday home market segment is the reasons why people purchase a holiday home as this provides much information for marketing campaigns and includes factors like relaxation, spending time with family, recreational pursuits and a healthier lifestyle.

5.4 Impacts on national tourism policy

National data shows that there are an increasing proportion of people purchasing holiday homes both in Ireland and overseas. This has considerable implications for the industry as a whole, as well as accommodation providers, as the potential markets for self-catering accommodation may for example suffer the consequences of lower demand. This is already evident in the second quarters 2004 results which show that B&Bs and guesthouses have suffered a 9 percent decline in bed nights as compared to the same time last year, while there has been a 54% rise in the number of nights spent in holiday homes (CSO, 2004). Over the last decade we have seen the emergence of a new category of accommodation choice for tourists and with a limited domestic market size this has to have implications for other accommodation suppliers and so must impact tourism policies and strategies both nationally and locally.

6. Conclusions

This research challenges us to re-think our impressions of holiday home makers. This type of property ownership is not solely concentrated among the elite, they bring substantial economic benefits to the local area in which they holiday and they spend substantial amount of time in the area year round. These findings have implications for destination planners and managers and indeed for bodies involved in national

tourism policy. This group of tourists may now appear more attractive as a market segment that destinations which to attract. From a national tourism point of view it has been shown that there is a clear upward trend in the extent of holiday home ownership and this will have implications not only for individual destinations, and indeed regional societies and economies, but also for other accommodation sectors that may see the knock on effect on their levels of demand.

From an academic perspective this article contributes to the literature which profiles holiday home owners and attempts to ascertain their motives for purchasing their homes. It also adds an Irish perspective and case study to this international literature. In the case of North Wexford the primary motives for buying a holiday home in the area centre around looking for a place to relax in and a place near the beach and this is probably similar to many coastal resorts and in fact mirrors the motivations that 'regular' tourists have for visiting such areas. It shows that high levels of economic growth can significantly alter accommodation choice patterns among tourists and create a rise in holiday home ownership.

In conclusion this article has provided academic research which can inform the general debate about holiday homes in Ireland. While it is noted that some of the findings may be particular to North Wexford it also exhibits the usefulness of such research and may lay the foundation for a similar study in another area to determine whether the findings would be replicated elsewhere. Celtic Tiger growth in Ireland over the past decade has significantly altered our economy and society, and in terms of tourists has resulted in a new breed of holidaymaker – the holiday home owner. While holiday home owners have long existed in Ireland, high levels of economic growth have made this type of ownership more extensive and identifiable and rather than disparate individuals, this group can now be classified as a distinct type (or breed) of holiday maker. Researchers, destination managers, tourism policy bodies, tourism suppliers, and more especially accommodation suppliers, have to begin to analyze the implications of this trend. This article has perhaps turned the first stone.

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