



The Centre for
Cross Border Studies

Briefing Paper
The impacts of COVID-19 on cross-border
tourism on the island of Ireland:
A snapshot

May 2020

Introduction

In light of the current public health crisis relating to Covid-19, and as part of the Centre for Cross Border Studies' ongoing research into the impact of the virus on the island of Ireland and the connections between the two jurisdictions, this Briefing Paper briefly examines the pandemic's effect on all-island tourism.¹ The Centre for Cross Border Studies recognises the need for the current restrictions on the island of Ireland, and strongly support the measures taken to ensure the safety of the public by the governments in the respective jurisdictions, however, there is no doubt that these safety measures while completely necessary, are impacting negatively on the tourism sector on the island of Ireland. In response, a range of support measures have been launched by the Irish and UK governments, as well as Northern Ireland's devolved administration.

Industry's concerns: North and South

79% of businesses stated that Covid-19 would have a severe impact on their business in the short term (0-3 months) and 63% stated it would be severe in the longer term (4 months +) demonstrating a perceived worsening of the situation since March.



Figure 1: Overall Impact of Covid-19 Tourism NI Survey

A survey conducted by Tourism NI of Northern Ireland businesses within the tourism and hospitality sector in the lead-up to the Easter Holidays revealed the particular concerns and difficulties the sector faces as a result of the Covid-19 crisis. The online survey canvassed 1,300 businesses with representation from across the entire sector with 708 fully completed responses received.² John McGrillen, Chief Executive of Tourism NI, has stated: "The biggest health emergency Northern Ireland has ever faced has also caused an unprecedented economic crisis, and within that our tourism and hospitality sector has been hit hard and hit fast".³ The findings show that from respondents alone nearly 1,300 staff have been permanently laid off since the health crisis hit – equating to approximately half of the job growth achieved across the sector in the last 10 years. A third of businesses stated they are not eligible for any of the three Northern Ireland business support schemes,

¹ This Briefing Paper was authored by Mark McClatchey, Administrative Research Assistant, Centre for Cross Border Studies.

² Tourism NI, "Covid-19: Industry Survey April 2020" (21 April 2020), <https://tourismni.com/globalassets/media-centre/press-release-2020/tourism-and-hospitality-covid-19-impact-survey---april-2020.pdf> [last accessed 30/04/2020].

³ Tourism NI, "Tourism NI Survey Confirms Impact of Covid-19 on Industry" (21 April 2020), <https://tourismni.com/media-centre/News/tourism-ni-business-survey-confirms-severe-impact-of-covid-19-on-industry/> [last accessed 30/04/2020].

as they do not pay business rates. Moreover, 47% of businesses indicated they are not eligible for the UK-wide Coronavirus Job Retention Scheme as they do not operate a PAYE scheme.⁴

Meanwhile, Fáilte Ireland has also highlighted how the COVID-19 crisis is one of the most challenging and difficult times the tourism and hospitality industry in the Republic of Ireland has ever faced,⁵ with its CEO, Paul Kelly, stating that these are “truly unprecedented times for the tourism sector across the board and the effects will be catastrophic for the industry”.⁶ Before the crisis began, according to Fáilte Ireland the Irish tourism industry was worth an estimated €9.4 billion, and employing about 260,000 people. The Irish Tourism Industry Confederation (ITIC) has warned that whereas overseas tourist expenditure in Ireland in 2019 amounted to €5.1 billion, in 2020 it could amount to as little as €1.58 billion due to the COVID-19 pandemic. “Of course”, according to ITIC, “the domestic tourism market should respond quicker and there is an onus on industry and Fáilte Ireland to stimulate demand within the Irish market-place as soon as appropriate”.⁷

COVID-19 and cross-border tourism

In order to attempt to begin to gauge the impact on cross-border tourism, the Centre for Cross Border Studies has examined the statistics relating to the number of cross-border caravan journeys recorded by Transport Infrastructure Ireland (TII) and available on the TII website.⁸ The data examined was collected from a total of 12 TII traffic counters located in the closest proximity to the Northern Ireland/Ireland border. The statistics are taken over a period of 7 days during this year’s Easter holidays⁹ and compared with the same period from the previous year.¹⁰ While we are making certain assumptions with the statistics available, they do give an initial picture of the negative impact which Covid-19 is having on the industry, specifically the self-catering sector.

Reference	Traffic Counter Location
Site 1	N01 North of Jn20 Jonesborough, Ravensdale, Co. Louth
Site 2	N53 Between NI Border and Castleblaney, Drumgoose, Co. Monaghan
Site 3	N12 Armagh Road, Between N02 and R213
Site 4	N02 Between NI Border and Emyvale, Mullinderg, Co. Monaghan
Site 5	N54 Between Butlers Bridge and Clones, Clonoony, Co. Monaghan
Site 6	N03 Between Belturbet and George Mitchell Bridge at NI Border, Belturbet, Co. Cavan
Site 7	N87 Between Ballyconnel and NI Border, North of Swanlinbar, Co. Cavan
Site 8	N16 Between Enniskillen and Sligo, McNear Court, Co. Sligo

⁴ *BelfastLive*, “Covid-19 devastating tourism with nearly 1,300 staff permanently laid off” (22 April 2020), <https://www.belfastlive.co.uk/news/belfast-news/covid-19-devastating-tourism-nearly-18128118> [last accessed 30/04/2020].

⁵ Fáilte Ireland, “Fáilte Ireland launches wellbeing supports for employees across the tourism and hospitality industry” (17 April 2020), <https://covid19.failteireland.ie/industry-updates/failte-ireland-launches-wellbeing-supports-for-employees-across-the-tourism-and-hospitality-industry/> [last accessed 30/04/2020].

⁶ Fáilte Ireland, “Message from Paul Kelly, CEO” (13 March 2020), <https://covid19.failteireland.ie/industry-updates/message-from-failte-irelands-ceo/> [last accessed 30/04/2020].

⁷ Irish Tourism Industry Confederation, “Covid-19: ITIC Bulletin 5: Emerging from Irish tourism’s greatest ever challenge” (April 16 2020), <https://www.itic.ie/ezine/covid-19-itic-bulletin-5/> [last accessed 30/04/2020].

⁸ The TII Traffic Data website presents data collected from the TII traffic counters located on the National Road Network. [https://www.nratrafficdata.ie/c2/gmapbasic.asp?sgid=ZvyVmXU8jBt9PJJE\\$c7UXt6](https://www.nratrafficdata.ie/c2/gmapbasic.asp?sgid=ZvyVmXU8jBt9PJJE$c7UXt6)

⁹ Time period used for 2020, 10/04/2020-17/04/2020

¹⁰ Time period used for 2019, 19/04/2020-26/04/2020

Site 9	N03 Between Belleek and Ballyshannon, Templenew, Co. Donegal
Site 10	N15 Lifford to Castlefinn, Inchenagh, Co. Donegal
Site 11	N14 Between Lifford and Letterkenny, Drumbuoy, Co. Donegal
Site 12	N13 Between Bridgend and Burnfoot, Co. Donegal

Figure 2: TII Traffic Counters Used

The Easter holiday period normally signals the start of the spring and summer holiday seasons across the island of Ireland, the period in which the tourism industry carries out 70% of its business.¹¹ The Easter week holiday is recognised as one of the busiest periods of the year for the tourism industry on the island of Ireland. While there would normally be a significant number of people journeying to caravan parks and campsites in either jurisdictions, figures show a severe decrease in the number of caravan journeys when compared to the same data from the previous year. Indeed, the Easter holiday period saw increased efforts by Garda to discourage people from crossing the border from Northern Ireland.¹²

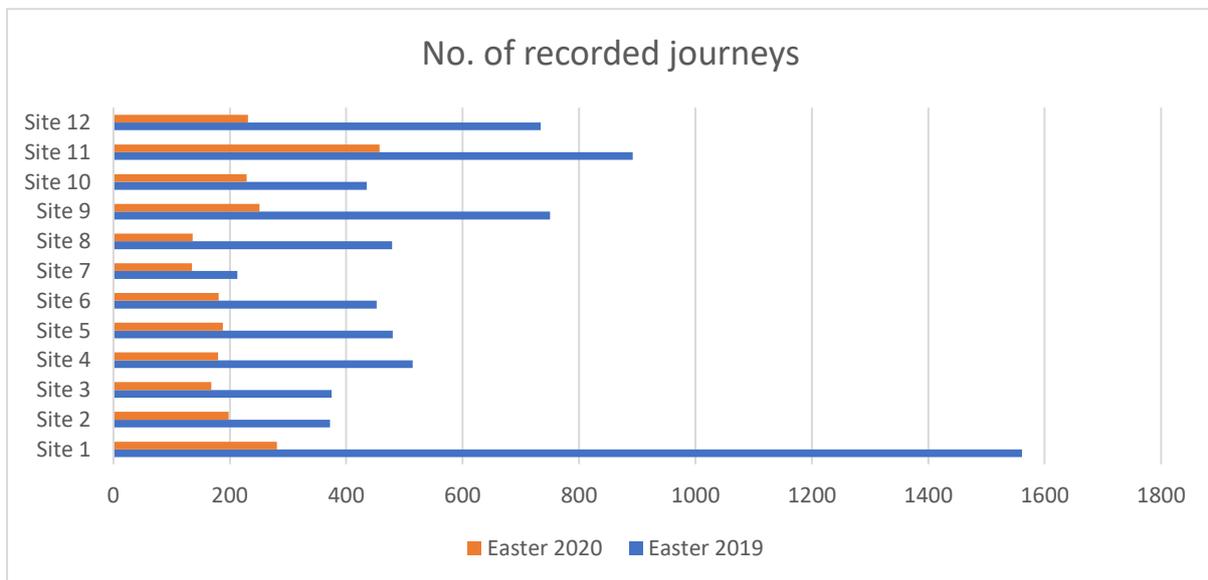


Figure 3: TII Easter Caravan Journeys 2019 vs 2020

Combining the data from across the 12 Traffic Counter sites, there was a 63.7% decrease in the number of journeys compared to 2019, with 4,622 less trips recorded in 2020. The largest decrease in journeys took place at Site 1, N01 North of Jn20 Jonesborough, Ravensdale, Co. Louth, which recorded 1,561 caravan journeys in 2019, compared to only 281 in 2020, a difference of 1,280 and a deficit of 82%. The smallest decrease was seen at Site 7, N87 between Ballyconnel and the Northern Ireland border, North of Swanlinbar, Co. Cavan, which recorded a 36.6% decrease from 2019.

¹¹ Tourism NI, "Tourism Recovery Steering Group set up for NI tourism sector" (23 April 2020), <https://tourismni.com/media-centre/News/tourism-recovery-steering-group-set-up-for-northern-irelands-tourism-sector/> [last accessed 30/04/2020].

¹² See, for example, Suzanne McGonagle, "Coronavirus border lockdown", *The Irish News* (9 April 2020), <http://www.irishnews.com/coronavirus/2020/04/08/news/border-lockdown-1896245/> [last accessed 27/04/2020].

While this analysis has a narrow focus and covers only a small period of time, it nevertheless shows a significant change in the number of journeys recorded. It also supports the concerns expressed by the tourism and hospitality sector in both jurisdictions on the island of Ireland. The particular difficulties facing this industry have been acknowledged by both the Dublin and Belfast governments, with the establishment of a COVID-19 Tourism Industry Advisory Group in the Republic of Ireland and Tourism Recovery Steering Group in Northern Ireland, both groups bringing together representatives from across the tourism sector and government officials.

Conclusion

The Centre for Cross Border Studies, while acknowledging the difficulties and pressure facing officials at this time, would encourage both of these groups to explore areas for cross-border cooperation in responding to this crisis and the challenges ahead given the past successes of cooperation in the tourism sector. There is also, now more than ever, a need for crossborder impact assessment to be carried out on any policies to maximise their potential benefits by identifying opportunities to make positive cross-border connections.¹³ The current crisis poses enormous challenges to all citizens across this island – and across these islands – which demand intensive coordination and cooperation between sectors and between jurisdictions. The structures for North-South cooperation are there and they need to be employed to their fullest extent in order to more properly address the immediate impacts of the pandemic, and to accelerate the economic recovery that will be desperately needed in both parts of this island.

¹³ Centre for Cross Border Studies, “The need for regulatory cross-border territorial impact assessment: Challenges at the Ireland-Northern Ireland border” (December 2019), <https://crossborder.ie/site2015/wp-content/uploads/2020/01/CCBS-Briefing-Paper-The-need-for-regulatory-cross-border-territorial-impact-assessment.pdf>