

**Tourism Ireland's submission to the
Joint Committee on Media, Tourism, Arts, Culture, Sport and the Gaeltacht**

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1. Introduction

The impact of COVID-19 on travel and tourism globally has been overwhelming, with unprecedented and extremely serious consequences for the tourism and hospitality sector on the island of Ireland. Our industry has faced a battle for survival like it has never seen before; healthy businesses were forced to close, with some never to re-open, while others had to deal with varying restrictions and critically low demand.

The current situation is extremely serious. Now in the second quarter of 2021, COVID-19 continues to have a devastating impact on our industry. With the news of the vaccine roll-out in December 2020, hopes rose that 2021 would see a recovery and a revival for our industry. However, the third wave of the pandemic, and the impact of virulent new strains, resulted in more restrictive public health measures being put in place. Ireland is now facing into a second consecutive summer of few, if any, international tourists. Recovery in overseas tourism is now not expected until at least the third quarter of 2021.

Feedback from our overseas travel trade partners is that business is ebbing away for 2021. Uncertainty is a significant negative factor for our sector and is having a negative impact on travel demand and the competitive positioning of Ireland. With no roadmap on when overseas tourism may restart, we run the risk of losing the entire tourism season. Our travel trade partners are strongly of the view that a roadmap or timeline for the restart of inbound tourism is necessary, so that Ireland can effectively compete around the world.

Aviation has suffered a dramatic collapse as a result of the pandemic and Ireland's international connectivity has been decimated. This loss of air connectivity is a major concern and will have a detrimental impact on our industry if it is not restored.

2. About Tourism Ireland

Tourism Ireland is responsible for marketing the island of Ireland as a compelling holiday destination overseas. It was established as one of the "six areas of co-operation" under the framework of the Belfast Agreement of Good Friday 1998 and operates under the auspices of the North South Ministerial Council through the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media in Ireland and the Department for the Economy in Northern Ireland. Our principal objectives are to increase tourism to the island of Ireland and to support Northern Ireland to realise its tourism potential. In a normal year (i.e. before COVID-19), we

deliver world-class marketing programmes in over 21 markets around the world and reach a global audience of around 600 million people each year. Our extensive and targeted programme of activity includes advertising, social media and digital marketing, overseas publicity, as well as co-operative promotions with air and sea carriers and other travel partners.

3. Importance of overseas tourism

The importance of overseas tourism cannot be overstated. Before COVID-19, overseas tourism had recorded nine consecutive years of record growth. 2019 surpassed all previous records, when we welcomed 11.3 million overseas visitors to the island of Ireland, who spent €5.9 billion while here. Tourism was our largest indigenous industry, employing around 325,000 people across the island in 2019. In a normal (non-COVID) year, around 75% of the tourism spend comes from international visitors and therefore, the economic hardship on the tourism industry cannot be compensated for by domestic business.

4. Impact of COVID-19 on overseas tourism and air travel to Ireland

Following a record year for overseas tourism in 2019, lockdowns to protect our population from COVID-19 brought an abrupt stop to inbound tourism in March 2020. From the original target of +2% growth in overseas visitors set out by Tourism Ireland for 2020, the actual outturn for the year was a decline of around -80%.

Aviation has suffered a dramatic collapse as a result of the pandemic. In the summer of 2019, there were over 617,000 scheduled, direct, one-way airline seats available each week to the island of Ireland. Following the global outbreak of the pandemic last spring, within a matter of weeks the airline industry worldwide had been brought to its knees. From late March 2020, airline passenger numbers began to drastically decline, and airlines cut capacity and routes in a bid to save cash, as the full impact of lockdowns and travel restrictions took hold. By April, travel to Ireland and Northern Ireland had effectively paused. Many of the remaining air services were considered essential links and/or were being operated primarily for cargo operations. As cases eased last summer in Ireland and travel bans were lifted in Northern Ireland, there was a modest increase in air capacity.

As an island destination, the importance of convenient, direct, non-stop flights cannot be overstated – they are absolutely critical to achieving growth in inbound tourism. The loss of

our international air connectivity is a major concern and will have a detrimental impact on our industry if it is not restored.

5. COVID Tracker research: monitoring consumer motivations

From the outset, Tourism Ireland has been monitoring the global impact of COVID-19. In the face of the fundamental changes facing our industry, it is vital that we have a comprehensive understanding of the changed consumer and the new marketplace. Tourism Ireland commissioned our largest ever programme of research in our major markets – to assess the impact of the pandemic on travel intentions, to help identify when consumers will be ready to consider holidaying again and which of our markets will offer us the best short-term prospects. We use this research to explore in-depth which segments and demographics are most likely to travel, which products and experiences will most appeal to them and what messaging will most strongly convince them to consider holidaying on the island of Ireland, when the time is right. The insights we gain will help to ensure that our promotional plan is as tightly targeted and as powerfully motivational as it possibly can be, in order to drive a strong recovery, as quickly as it is possible to realise it. This research will continue to be a very valuable planning input for Tourism Ireland as the situation improves.

Some of the key findings of our research include:

- the fundamental desire to travel remains;
- closer-to-home markets are likely to be first to recover;
- ‘wholesome reconnection’ is a recurring theme;
- visiting friends and relatives, as well as destinations which are familiar, are the holidays most likely to be considered first; and
- our competitive position (vis-à-vis other destinations) continues to deteriorate.

6. ‘Keeping the lights on’ for the island of Ireland

Given the ongoing impact of COVID-19 here on the island of Ireland, and in our key overseas markets, most of Tourism Ireland’s traditional promotional activity remains on hold. However, it is vital for Tourism Ireland to keep the island of Ireland ‘top of mind’ with prospective international visitors, until the time is right for them to visit. We are therefore undertaking an extensive – largely virtual or online – programme of activity, to ensure that we are in the best possible place to immediately start converting business for tourism operators across the

island of Ireland, when the time is right. Here are some of the highlights of our programme of activity to ‘keep the lights on’ for Ireland:

➤ **#FillYourHeartWithIreland social campaign**

Tourism Ireland’s global social campaign, #FillYourHeartWithIreland (#FYHWI), which has been running since April 2020, is continuing in 2021. The aim of the initiative is to bring the best of the island of Ireland onto people’s screens and to help ensure that Ireland stays ‘front-of-mind’ with prospective visitors for future holidays. It involves the sharing of inspirational content that speaks to the world at this difficult time and connects people with the island of Ireland.

To date, our #FYHWI campaign has achieved excellent engagement with our fans and followers. It has delivered 1.68 billion impressions (or opportunities to see) on our Facebook channels, with around 124 million views and 12 million engagements. There have been 307,000 engagements on Twitter, as well as 10 million engagements and 9.9 million ‘likes’ on Tourism Ireland’s Instagram channels.

One of highlights of the #FYHWI campaign this spring has included our collaboration with the Irish Film & Television Academy (IFTA), involving the creation of a number of short online films featuring internationally recognised actors, such as Pierce Brosnan and Liam Cunningham. The first video in the series, featuring Pierce Brosnan, has had over 7.6 million views on YouTube; it was also shared with Tourism Ireland’s fans and followers on other social channels, including Facebook, Twitter and Instagram.

➤ **St Patrick’s Day 2021 campaign**

In March 2021, Tourism Ireland rolled out its biggest ever St Patrick’s Day programme of promotions around the world. Against the ongoing backdrop of COVID-19, the programme was more important than ever before. During this challenging time, we wanted to mark St Patrick’s Day and to keep the island of Ireland to the fore in a really positive light. Our paid campaign reached around 60 million people around the world. And we reached many, many more through huge positive international media coverage – in print, broadcast, online and social media – which was worth approximately €22 million in equivalent advertising value (EAV).

Our programme of activity included an ‘**Orchestra of Light**’ – a spectacular aerial light show featuring a swarm of 500 drones animating the skies of Dublin, created by Tourism Ireland, St Patrick’s Festival and Dublin City Council; **Tourism Ireland’s Global Greening** initiative – which saw a record 725 sites in 71 different countries light up in green; our new **St Patrick’s Day film**

narrated by Liam Neeson – which was viewed almost 54 million times on social channels and on connected TV (i.e. television connected to the internet); our **‘St Patrick’s Day at Home’** event – which was viewed 635,500 times on Facebook and YouTube and was also highlighted on a billboard in Times Square in New York; extensive **engagement with our key travel trade and media** contacts; and our **St Patrick’s Toolkit**, designed for our tourism industry partners to target their previous overseas visitors via email marketing or on social media.

➤ **Supporting our industry partners at overseas trade promotions**

As part of our strategy to support tourism businesses from across the island of Ireland to get back to the international marketplace, Tourism Ireland, together with around 370 tourism industry partners, participated in 26 virtual trade promotions in the first quarter of 2021 – meeting, and doing business with, over 5,000 important travel trade contacts. These virtual promotions included ITB Berlin NOW, the PGA Merchandise Show in Orlando, Britain and Ireland Marketplace, the Los Angeles Travel & Adventure Show, a Virtual Northern Ireland Expo in North America, a Northern European virtual workshop and an ‘Ireland Meets the Middle East’ virtual workshop, as well as a virtual sales mission to Austria and Switzerland. Even though it is still not possible for overseas holidaymakers to travel here right now, our aim is to support our tourism industry partners to begin to recover their international business. Together, we are highlighting the island of Ireland to the important international travel trade, to position us well for when the time is right to welcome their clients. Again, this is about ‘keeping the lights on’ for the island of Ireland and maintaining our ‘share of voice’ in overseas markets, until such time as international travellers can visit again.

7. Brexit

Up until the outbreak and spread of COVID-19, Brexit had dominated all other uncertainties for overseas tourism to the island of Ireland. Since the UK voted to leave the EU in 2016, Brexit has been a major factor in Tourism Ireland’s planning, particularly given the importance of Great Britain as a key source market for tourism and its contribution to both regional and seasonal spread objectives. Tourism Ireland has been tracking the impact of the UK’s decision to leave the EU since 2016. We have taken a number of steps to monitor the situation, maintain confidence among our partners in Great Britain, Mainland Europe and at home, and ensure we are ready to deal with the implications.

As well as tracking consumer opinion and behaviours in relation to travel during COVID-19, our most recent wave of research, in March, also examined current consumer sentiment regarding Brexit. Among those surveyed in Great Britain, Brexit/EU Exit was off-radar, given that COVID-19 has restricted travel; therefore, holidaymakers perceived it to have very little bearing on current holiday planning. There was mixed understanding about the impact of Brexit but little engagement; however, some concerns around the practicalities of passports, queues, touring and roaming charges came to mind among the respondents, when discussing post-Brexit travel. Just under half of the outbound holidaymakers surveyed in Britain were aware of the Common Travel Area; however, only one-fifth knew what it actually was. New requirements for pet passports and the need for a green card for those driving their own car in the EU could prove to be a future dampener, when travel resumes.

8. Redevelopment of Ireland.com

A significant redesign of Tourism Ireland's international website, Ireland.com, and our digital marketing capability, has been under way. The new Ireland.com is now live; in all, there are 33 market sites, in 30 different countries, in 11 languages. The site will be fundamental to our proposed kick-start success.

9. Tourism recovery taskforces

Tourism Ireland has been represented on the taskforces in Ireland and Northern Ireland, which were set up to identify measures to enable tourism to recover from the devastating effects of COVID-19. The taskforces have set out clear direction for the tourism recovery. Our activity to restart inbound tourism to the island of Ireland will build on their recommendations. Tourism Ireland was also represented on the Aviation Recovery Taskforce in Ireland.

10. Framework for recovery: RESTART, REBUILD, REDESIGN

Throughout the pandemic, Tourism Ireland has identified key themes which need to be addressed for recovery. They are:

- Consumer motivation to travel: to help us identify when consumers will be ready to consider holidaying again and which markets offer us the best short-term prospects.
- Restoration of access: the airline industry has been hit particularly hard by this crisis. The island of Ireland has now found itself in a competitive situation for air routes, with

no guarantees about which routes will operate. Support will be required to build demand and increase the viability of new and existing routes.

- Retaining a strong, internationally appealing industry: the overseas travel trade have long been loyal supporters of the island of Ireland; however, we are now facing higher levels of competition than ever before from destinations across the world. The excellent relationships which Tourism Ireland enjoys with the overseas travel trade are vital to our long-term success. Tourism Ireland will need to invest, to create the demand which will support the product on the ground.

To support these themes, Tourism Ireland has established a framework for recovery. This is a three-phase plan to RESTART, REBUILD and ultimately REDESIGN demand. Tourism Ireland is closely monitoring the situation and has outlined three potential scenarios for promoting travel from overseas to the island of Ireland. Scenario 1 is considered the central scenario.

- Scenario 1: Resumption of activity in multiple markets from Q3 2021.
- Scenario 2: Resumption in Great Britain from Q3 2021; and in other markets in December for 2022 travel.
- Scenario 3: Resumption in December for 2022 travel in permitted markets.

11. RESTART: The Green Button campaign

Promoting the island of Ireland in the aftermath of COVID-19 will require a new, tactical campaign, delivered at scale in our main markets. Once the time is right to RESTART, Tourism Ireland will be ready to act – with a major new consumer campaign called ‘The Green Button’. At the point of RESTART, all Tourism Ireland activity will switch from creating a longing for Ireland to creating bookings. The aim of ‘The Green Button’ campaign will be to single-mindedly drive visitor numbers and intention to book a trip to the island of Ireland. The concept revolves around creating a commitment to travel here by ‘pressing the green button’ – green being the universal colour of ‘go’ and instinctively connected with Ireland. Filming for the campaign will take place around the island of Ireland in May. It will include a focus on outdoor experiences and will feature some of our iconic attractions. This will be launched, when the time is right, with a very clear ‘book now’ message. It will be highly visible, utilising multiple channels such as TV, digital and out-of-home.

12. RESTART: air and sea access

As an island destination, direct, convenient and competitive access is crucial to the tourism industry. Tourism Ireland supports the recommendations of the Aviation Recovery Taskforce in Ireland and the access recommendations from the Northern Ireland Tourism Recovery Steering Group. As part of this, we stand ready to provide assistance in partnership with government, airlines, airports and sea carriers for viable inbound initiatives to the island of Ireland, some of which are likely to require significant public investment beyond the remit of Tourism Ireland. This area is subject to EU and UK regulation, as well as areas of the EU-UK Trade and Co-operation Agreement; these will be fully considered as appropriate.

13. RESTART: industry and trade sales activation

The travel trade overseas is likely to become an even more important channel for tourism to the island of Ireland throughout the RESTART phase of recovery – given the reassurance they offer to consumers and their ability to distribute visitors right around the island. Tourism Ireland will execute a trade plan, supported by Fáilte Ireland and Tourism Northern Ireland, which incorporates reassurance activity, trade communications, destination webinars and in-market events.

Ensuring the travel trade overseas are aligned with the widespread opening of overseas tourism to the island of Ireland, Tourism Ireland's teams around the world will continue to work with trade partners to promote the island of Ireland. The team will also drive new relationships with travel trade who have not previously considered programming the island of Ireland. We will also support industry on the island of Ireland to access overseas opportunities and in-market activation, including free access to overseas platforms enabling industry to connect with and to sell to trade, wherever it is feasible and cost-effective to do so.

14. Factors necessary for international travel to restart

The pace of recovery is unknown. However, based on the best information to hand, Tourism Ireland currently predicts the recovery could take in excess of five years. In order to improve on this position, an effective, sustained and large-scale marketing approach will be required.

As international travel begins to restart, it is clear that keeping the island of Ireland front and centre in consumers' minds will be critical. Every destination across the globe has experienced the impact of COVID and will be seeking their share of the recovery. This increases the

competition in the marketplace. When the time is right, Tourism Ireland needs to punch through the noise and create an immediate desire to visit. To achieve this, a significant marketing investment will be required to enable large-scale, reframed consumer communications in markets with the greatest opportunity.

Ireland currently has no timeline or roadmap for allowing non-essential inbound travel. The industry needs a degree of certainty that inbound tourism will begin this year; and a timeline to work towards restarting. It is not possible to start attractions, staff hotels, re-establish air routes and undertake sales and marketing activity with no lead time. Messaging from Government must be clear and consistent. Feedback from our overseas travel trade partners is that business is ebbing away for 2021; with no roadmap, we run the risk of losing the entire tourism season. A roadmap or timeline for the restart of inbound tourism is necessary, so that Ireland can effectively compete around the world.

In addition, Tourism Ireland's research is clear that, for significant tourism to return, the experience needs to be positive, enjoyable and easy. Current restrictions, including quarantine, will need to be eased for tourism to restart. This will depend on three key factors: the epidemiological situation, vaccination rates and variants of concern. The epidemiological situation needs to be positive – both here, on the island of Ireland, and in our source markets – for tourism to restart effectively. Mandatory quarantine, including the threat of quarantine, needs to be removed – both on arrival and returning home – before tourism can effectively restart. In particular, mandatory hotel quarantine poses a serious risk to our reputation as a warm and welcoming destination. Essentially, once the situation allows for a restarting of overseas tourism to Ireland, it needs to be facilitated with minimum COVID-19 friction.

In autumn 2020, the EU adopted an approach to permit travel under certain circumstances – commonly called the EU Traffic Light System. Unfortunately, due to the COVID-19 situation across Europe, the system was effectively in operation for a very limited time. Currently, states have their own restrictions in place which supersede this system. It will be important that Ireland will continue to apply the EU Traffic Light System going forward, so that unhindered non-essential travel can occur between green-listed countries.

Tourism Ireland welcomes the introduction of the European Commission's 'Digital Green Certificate' – which should help ease of travel, when it is safe to do so.

15. In conclusion

The current situation is extremely serious. We had an extremely successful industry up until 2019; it is essential that we get back to that position, as soon as the health situation allows.

Nonetheless, despite the uncertainty and major challenges, there are some factors that augur well for the future recovery of overseas tourism. The vaccine roll-out will be completed this year – here at home, as well as in our key source markets. Our research shows that there is considerable pent-up demand for travel. We can look to the future with a certain degree of optimism.

Tourism Ireland is committed to working with our colleagues in Fáilte Ireland, Tourism NI, the tourism industry and all stakeholders to support the recovery. We have a shared ambition for a sustainable recovery. Tourism Ireland's focus will be on supporting the economic sustainability of our sector in the first instance, while being cognisant of our longer-term duty to communities and the environment. Above all, flexibility and agility will be key elements of Tourism Ireland's work.

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