

# Access into Northern Ireland

## Summer 2014





## Introduction

Air Access has been identified as one of the strategic priority areas for economic development and tourism in Northern Ireland. The maintenance of existing air routes and the introduction of new routes, particularly to Continental Europe and North America, are vital to the Northern Ireland economy.

In 2003, Northern Ireland had direct access to one European city. Now in 2014 we can fly direct to 50 destinations (47 in summer 2013):

- 25 cities in Great Britain (GB)
- 22 European destinations
- Other Europe (one - Isle of Man and one – Channel Islands)
- One United States (US)

In addition to this, five sea routes will operate during the summer between Northern Ireland and GB via:

- Larne to Cairnryan
- Larne to Troon
- Belfast to Cairnryan
- Belfast to Birkenhead, Liverpool
- Belfast to Isle of Man

This update provides an estimated comparison on access to Northern Ireland – by type (air and sea) and by country (Europe, North America and Great Britain) during summer 2014 compared with summer 2013.

It reflects all air and sea traffic that passes through the three main Northern Ireland airports (Belfast International Airport, George Best Belfast City Airport and the City of Derry Airport) and the seaports of Larne and Belfast.

Figures for the island of Ireland and Republic of Ireland (ROI) access are also examined in order to assess the relative situation of NI air and sea access, and also from the view that ROI can act as a gateway to NI for tourists.

### **Please note:**

- Figures included within this report are based on estimates only.
- On island of Ireland figures, increases may be due to a growth change in ROI routes.

## Key Facts

### Air



3%



in capacity to island of Ireland compared to summer 2013

7%



in capacity to Northern Ireland compared to summer 2013

The total capacity (seats on direct scheduled air services to the island of Ireland) is 3% up on summer 2013.

- There is a 7% decrease in seats on Northern Ireland routes.
- There is a 6% increase in seats on Republic of Ireland routes.

#### Combined all-island capacity for the coming 2014 summer season shows:

Transatlantic air routes: 14% ↑

European air routes: 9% ↑

NI routes: 6% ↑

ROI routes: 10% ↑

Cross-channel air routes: 4% ↓

NI routes: 10% ↓

ROI routes: 1% ↓

### Sea



3%



in capacity to island of Ireland compared to summer 2013



unchanged capacity to Northern Ireland compared to summer 2013

The total available car capacity (spaces) for summer 2014 between Britain and Ireland remains unchanged from last summer.

- There is no change on Northern Ireland routes, with up to 122 sailings in each direction available for tourists between Britain and Northern Ireland during peak season, representing just under 22,000 car spaces per week on offer.
- There is a 5% increase in car capacity to the Republic of Ireland routes.

### Airports

- Capacity on offer at **George Best Belfast City Airport** is down 11% on last summer. Capacity on provincial routes is down 5% and London routes down 20%.
- **Belfast International Airport** has a reduction of 10%, with an 8% decrease on provincial routes and 13% decrease on London routes.
- **City of Derry Airport** will offer 4% less capacity over last summer.

## i) Britain to Northern Ireland

**122**  
sailings



unchanged to NI  
on last summer

**22,000**  
car spaces per week

## ii) Britain to the island of Ireland

Available car capacity on ferry routes between Ireland and Britain, based on current published schedules, is 3% up on last summer.

- A total of 119 sailings per week in each direction on routes to/from the Republic during the peak summer months will provide an aggregate capacity of an estimated 29,000 car spaces per week.
- The frequency between Dublin and Holyhead has increased to provide up to 5% additional car capacity.

Stena Line  
operates  
between:

- Belfast-Cairnryan, Scotland
- Belfast-Birkenhead, Liverpool

**53**  
sailings

- Stena Line will operate 40 sailings per week in each direction between Belfast and Cairnryan, offering a core daily schedule of six departures on most days. This frequency has remained unchanged from last summer.
- 13 sailings per week in each direction on the route between Belfast and Liverpool (Birkenhead), also unchanged from last year.

P&O Ferries  
operates  
between:

- Larne-Cairnryan, Scotland
- Larne-Troon

**67**  
sailings

P&O Irish Sea Ferries will operate 53 sailings per week in each direction from Larne to Cairnryan including a fast ferry service, unchanged from last summer. Seasonal operation of P&O's fast ferry between Larne and Troon will operate double daily (14 sailings) as in previous summers. Two conventional ferries – European Causeway and European Highlander operate on the Larne-Cairnryan route, while the fast ferry Superstar Express, operates from Larne to Cairnryan and Troon.

Isle of Man  
Steam-  
packet:

- Belfast-Isle of Man

**2**  
sailings

The Belfast-Isle of Man seasonal service will operate unchanged with two departures each week with Seacat Manannon.

## i) Continental Europe to the Island of Ireland

Table 1: Summer 2014 Seat Capacity change to island of Ireland from Europe, compared to Summer 2013 figures

	ROI		NI	
Total Europe		10%		6%
Spain		9%		6%
France		14%		11%
Germany		16%		N/A*
Italy		9%		50%
Poland		9%		No change
Portugal		16%		15%
Netherlands		2%		No change

\* Still no direct access from Germany to NI

### Europe to Northern Ireland

Capacity for summer 2014 is up 6% compared to summer 2013 an increase of 915 seats per week.

A total of 110 flights between Northern Ireland and European gateways will operate each week, offering 17,367 seats in each direction, compared to 104 departures and 16,452 seats last summer.

All services to Europe are operated by four airlines:

- **easyJet** – maintains 11 routes with new Belfast-Bordeaux weekly service.
- **Aer Lingus** – daily service to Faro and twice weekly to Palma Mallorca, unchanged from last summer. Frequency from Belfast to Malaga will be increased to daily from six per week.
- **Jet2** – maintain service on three routes, increase frequency on three routes and reduce frequency on four routes. Two new services will be launched from Belfast to Lanzarote and Malaga.
- **Ryanair** – will operate from City of Derry to Faro and to Alicante as last summer.
- **Spain continues to be the top destination with a 6% increase in capacity**, just over 9,684 seats per week. Capacity to Portugal is up 15% to 3,633 seats per week, while capacity to the Netherlands is unchanged at 1,404 seats per week. Capacity to/from France is up 11%, due to the new easyJet route to Bordeaux. Poland and Malta remain unchanged from last summer.

### Europe to Republic of Ireland

The summer scheduled capacity on routes between Europe and ROI is up 10% on last year.

- Capacity on routes between Europe and the Republic of Ireland is up 10% on last year to 188,358 seats per week on 1,063 departures in each direction.

### Europe to the island of Ireland

Total weekly capacity stands at just under 206,000 seats in each direction between the island of Ireland and mainland Europe is up 9% over last winter.

- Spain continues to be the highest volume route with 61,385 seats per week (up 9% from last summer), followed by France (up 14% to 27,870), Germany (23,145 up 16%), Portugal (18,547 up 16%) and Italy (15,613 up 8%). Capacity is down in services to/from the Netherlands, Poland and Belgium.

## ii) Cross-channel air routes to the Island of Ireland

**4%**  in aggregate capacity on cross channel air routes to island of Ireland compared to summer 2013

### London to Northern Ireland

**16%** 

The operating capacity for summer 2014 is 66,030 seats on 565 departures in each direction per week, a 10% decrease on last year. Capacity on services to/from London is down from 23,226 seats - a 16% decrease.

Principle features/changes to last summer include:

- Capacity on London services to/from:
  - Belfast International Airport – down 13% to almost 11,000 seats per week
  - Belfast City Airport – down 20% to 11,107 seats per week.
- Heathrow services will operate to/from Belfast City Airport with Aer Lingus and BA – 62 departures between the two carriers / just under 8,000 seats per week in each direction.
- Significant decrease in services between Belfast and Gatwick with Flybe withdrawing from the route – a loss of 3,000 seats / 26 departures.
- Stansted service, maintained by easyJet from Belfast International – one frequency less.
- Service between Luton and Belfast International – maintained by easyJet with two fewer departures to 2,880 seats.
- Southend-Belfast International service, operated by easyJet – now withdrawn – a loss of just over 1,000 seats.
- Ryanair maintains frequency on City of Derry Airport to Stansted route daily – 1,323 seats per week.

### London to Republic of Ireland

An estimated 132,500 seats per week in each direction is available, representing a 1% decrease on last summer.

### Provincial routes to Northern Ireland

**6%** 

A total of 407 flights per week, compared to 410 last summer, providing just under 42,764 seats per week in each direction, a 6% reduction.

This includes:

- 127 departures per week will operate from Belfast International on eight routes to provincial points.
- 263 departures per week on 14 routes from Belfast City.
- easyJet will operate all 127 departures per week from Belfast International. New route to Jersey will operate two departures per week, after the withdrawal of Jet2 on the route.
- Jet2 has withdrawn Belfast International to Blackpool.
- Flybe has also withdrawn Belfast City to Jersey service, but maintains all other services from Belfast City.
- Citywing is operating 21 departures per week on the Isle of Man-Belfast City route, down by one since last summer.
- Ryanair maintains daily service from City of Derry to Prestwick and four departures per week to Birmingham. Frequency from Derry to Liverpool is reduced to six departures per week.

### Provincial routes to Republic of Ireland

Cross-channel services operate to 18 airports outside London from ROI airports on a total of 41 routes. Total capacity on offer has declined 10% on last summer, with 58,174 seats per week on 528 departures.

### iii) North America air routes to the Island of Ireland

#### US to Northern Ireland Routes

United Airlines will maintain a daily summer service from Newark (New York) to Belfast providing 1,183 seats per week, remaining unchanged from last summer.

There has been no change in capacity from US to Northern Ireland routes since summer 2007.

#### Canada to Northern Ireland Routes

No scheduled services or charter services will operate during the 2014 summer period.

#### US to Republic of Ireland Routes

The summer schedule provides for up to 151 departures per week for peak summer (June/July/August), offering just under 34,000 seats per week in each direction. This 17 additional departures per week in each direction - a 9% increase on last summer or just under 3,000 additional seats.

#### US to the island of Ireland Routes

Air service capacity between US and the Island of Ireland for summer 2014 will be up to 158 departures, with just over 35,000 seats per week in each direction.

During the peak months June/July/August, there will be a 9% more capacity on offer compared to summer 2013.

**Table 2: Capacity (seats per week) for Summer 2014 from US & Canada to island of Ireland, compared to Summer 2013:**

	ROI	NI
US	9% increase	No change
Canada	67% increase	-*

\* No direct flights from Canada to NI in operation in summer 2014.

#### Canada to the Republic of Ireland Routes

Aer Lingus and WestJet have entered the 2014 market, alongside seasonal operators Air Canada and Air Transat. This has significantly expanded the services and capacity on offer from Canada to Republic of Ireland with 5,128 seats in each direction on 25 departures per week. This represents a 67% increase in capacity on last summer. In addition, for the first time, year round service will operate between the two countries after the summer season.

## Summary

Access is one of the key requirements in order to build Northern Ireland's position as a destination for tourism, for short breaks, conferences, events and investment.

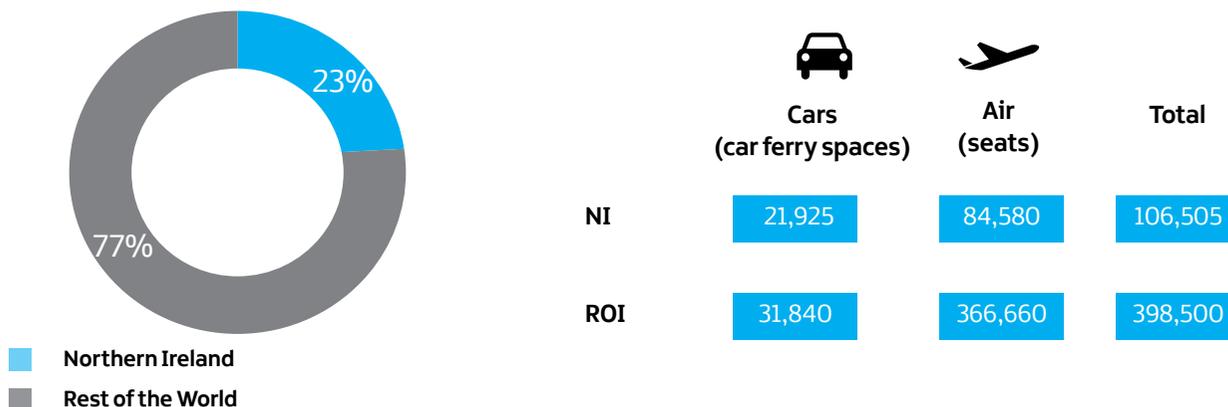
Competitively priced, wide ranging direct air access is vital to sustain Northern Ireland's tourism offering and deliver its potential for growth. In turn, this links to the need for good connectivity for onward travel once visitors' are here.

Tourism is now worth over £683 million each year and is poised to grow to a £1 billion industry by 2020 and support 50,000 jobs. Greater accessibility through direct air routes and connections via hub airports will be crucial in responding to visitors' desire for experiencing new holiday destinations and will contribute to achieving Northern Ireland tourism's 2020 targets of 4.5m visitors and £1billion revenue. Further updates on Easy Access and Convenient Transport into Northern Ireland can be found on [www.nitb.com](http://www.nitb.com).

Improved air access has the potential to deliver considerable benefits to the local economy. It will benefit local business people in terms of developing business linkages and improving access to overseas customers and international markets. More generally, it will contribute to improving the overall competitiveness of Northern Ireland businesses. It will also greatly benefit the efforts being made by the Northern Ireland Tourist Board and Tourism Ireland Ltd to promote in-bound tourism, particularly in relation to the lucrative short break and business tourism markets.

From the diagram below Northern Ireland continues to have slightly under a quarter of the overall capacity total for the island of Ireland in 2014 at 23%. This represents no change for Northern Ireland and Republic of Ireland on summer 2013 figures.

**Table 3: Total Global Capacity (air & sea access) for the island of Ireland summer 2014**



### Sources:

- Aer Lingus
- Belfast International Airport
- City of Derry Airport
- Citywing
- easyJet
- Failte Ireland
- Flybe
- George Best Belfast City Airport
- Jet2
- Northern Ireland Tourist Board
- Ryanair
- Tourism & Transport Consult International - Access Summer Inventory Report 2014
- Tourism Ireland Ltd
- United Airlines

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