

# Access into Northern Ireland

## Summer 2015

## Key Fact

**Wide ranging air access is a key enabler for tourism growth to Northern Ireland.**

**As a region we are very reliant on air links to connect to our visitors and are vulnerable to any reductions in air routes and services that limit customer choice.**

**In 2003, Northern Ireland had direct access to one European city. Figures for summer 2015 indicate that Northern Ireland has direct air access to 57 destinations.**

## Introduction

Air Access has been identified as one of the strategic priority areas for economic development and tourism. 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, NI had direct access to one European city. Now in 2015 we can fly direct to 57 destinations - a record number of destinations for NI (compared to 50 in summer 2014):

- 24 within the United Kingdom
- one within the Channel Islands (Jersey)
- 29 within Europe (compared to 22 in summer 2014)
- one in the United States (New York), with two one-off flights scheduled to Las Vegas and Orlando this summer.

We have 5 direct sea routes from:

- Larne to Cairnryan and Troon
- Belfast to Cairnryan, Liverpool and Isle of Man.

This update provides an estimated comparison on access to NI – by type (air and sea) and by country (Europe, North America and Great Britain) during summer 2015 compared with summer 2014.

It reflects all air and sea traffic that pass through the three main NI 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 the 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. Research shows that 55% of our overseas visitors come to NI via the Republic (98% of which had planned to do so in advance).

**Please note that these figures are based on estimates only.**

## Key Facts

Air



9%



in capacity to island of Ireland

10%



in capacity to Northern Ireland

Sea



122  
sailings



unchanged to Northern Ireland

112  
sailings

4%



to Republic of Ireland

The total available capacity (seats) on direct scheduled air services to the island of Ireland is 9% up on summer 2014.

- There is a 9% increase on seats on Republic of Ireland routes
- There is a 10% increase in seats on Northern Ireland routes.

- Total available car capacity (spaces) for summer 2015 to island of Ireland ports from around the world is 3% down on last summer.
- There is a 4% decrease on car capacity to Republic of Ireland routes with 112 sailings on offer to/from the Republic, with an estimated 27,500 car spaces per week.
- There is no change on Northern Ireland capacity 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.

Capacity changes for the coming 2015 summer season show:

Transatlantic routes  
(island of Ireland):

15% ↑

US routes  
(ROI routes):

15% ↑

European routes:

9% ↑

US routes  
(NI routes):

Unchanged ↔

NI routes:

20% ↑

ROI routes:

8% ↑

Cross-channel routes:

7% ↑

NI routes:

8% ↑

ROI routes:

6% ↑

## a) Continental Europe

20%  in capacity from Continental Europe to NI

## Europe to Northern Ireland

- Capacity for summer 2015 is up by 20% compared to last summer, an increase of 3,549 seats per week.
- A total of 134 flights between Northern Ireland and European gateways will operate each week, offering 20,916 seats in each direction, compared to 110 departures and 17,367 seats last summer.

## Capacity by Country from Europe to Northern Ireland

- Spain continues to be the top destination with just over 10,600 seats per week, accounting for 51% of the European capacity on offer. Capacity on Spanish routes is up 10% compared to a year ago.
- Portugal capacity is down 6% to 3,432 seats per week, while capacity to the Netherlands is up 42% (with launch of new route by KLM to Amsterdam) to just under 2,000.
- Capacity to/from France is up 10% to 1,715 seats per week, Poland up 77% (with launch of new route from Wizz Air) to 828 seats and Italy up 300% (with new service from Jet2 to Rome) to almost 600 seats per week.
- Lithuania, Iceland, Czech Republic, Croatia and Greece will all have new routes this summer.

## Services to/from Europe to NI

All services to Europe are operated by seven airlines. There are three new airlines operating for summer 2015. The changes offered by these airlines compared to last summer are:

- **easyJet** – maintains frequency on eight routes, reduces frequency on three routes while the frequency on Belfast-Bordeaux route is increased by one departure. Belfast-Split, Croatia (once per week) and Belfast-Reykjavik, Iceland (twice per week) are new routes for summer 2015 from Belfast International Airport.
- **Aer Lingus** – all services (to Faro, Portugal; Malaga, Spain; Palma Mallorca, Spain) are maintained as last summer with all services operating from Belfast City Airport.
- **Jet2** – will maintain frequency on nine routes and increase frequency on three routes. Five new services will be launched to Prague, Czech Republic (twice per week); and Zante, Greece (weekly); Rome, Italy (twice per week until 1st November); Verona, Italy (weekly) and Las Palmas, Gran Canaria (weekly).
- **Ryanair** – Ryanair will operate from City of Derry to Faro, Portugal (twice per week, reduced from three flights) and to Alicante, Spain (twice weekly), unchanged from last summer.

The three new airlines entering the Northern Ireland-Europe market this summer are:

- **KLM** - launched a new daily service from Belfast City Airport to Amsterdam in May 2015, providing 560 seats per week.
- **Vueling** - launched a new Belfast City to Barcelona service in May 2015, three times per week, offering 504 seats.
- **Wizz Air** - launched two new routes from Belfast International to Vilnius, Lithuania; and to Katowice, Poland in March 2015 - both operating two departures per week.

## Continental Europe contd.

### Continental Europe to the island of Ireland

The island of Ireland shows a 9% increase on capacity for summer 2015 in comparison with summer 2014, with just over 225,000 seats each way per week between Ireland and mainland Europe.

- Spain continues to be the highest volume route with 65,991 seats per week (up 8% from last summer).
- France is up 5%
- Germany increases by 5%
- Italy increases by 27%
- Capacity to/from Portugal is down 4%, while Netherlands and the Nordics are both up 6%.
- Capacity to/from all other main markets is increased for summer 2015.

### Continental Europe to Republic of Ireland

Capacity on routes between Europe and the Republic of Ireland is up 8% on last year with an estimated 204,325 seats per week on 1,155 departures in each direction on offer.

- Spain-Republic of Ireland continues to be the top route with over 55,000 seats per week, a 7% increase on last summer.
- Capacity on routes from France and Germany are both up 5% to 27,684 and 24,341 seats respectively.
- Italy is the fourth largest route with capacity up 25% to 19,271 seats per week.

**Table 1: Summer 2015 Seat Capacity to NI by country from Continental Europe, compared to Summer 2014 figures**

	Republic of Ireland	Northern Ireland
<b>Total</b>	+8% (204,325 seats)	+20% (20,916 seats)
<b>Spain</b>	+7% (55,363 seats)	+10% (10,628 seats)
<b>Netherlands</b>	-6% (9,675 seats)	+42% (1,988 seats)
<b>France</b>	+5% (27,684 seats)	+10% (1,716 seats)
<b>Italy</b>	+25% (19,271 seats)	+300% (592 seats)
<b>Poland</b>	+8% (10,713 seats)	+77% (828 seats)
<b>Portugal</b>	-3% (14,443 seats)	-6% (3,432 seats)
<b>Germany</b>	+5% (24,341 seats)	N/A
<b>Nordics</b>	+6% (7,126 seats)	N/A

Source: TTC

## b) Great Britain Cross-channel

8%



capacity on cross channel routes to NI

23%



on London to NI routes

No change



on provincial routes to NI

### Cross-Channel to Northern Ireland

- The operating capacity for summer 2015 is 71,214 seats on 607 departures in each direction per week, an 8% increase on last year.
- Capacity on services to/from London is up by 23%
- Capacity to provincial points is unchanged from last summer.

### Cross-channel to island of Ireland

Capacity on cross channel routes from GB to the island of Ireland is up 7% from last summer, to just under 212,000 seats per week.

### Cross-channel to Republic of Ireland

Capacity on cross-channel routes from GB to the Republic of Ireland is estimated at almost 141,000 seats per week in each direction, a 6% increase on last summer, which includes:

- a 10% increase in capacity on London routes
- 2% increase in capacity on routes from British provincial airports.

**Table 2: Summer 2015 Seat Capacity to NI from London and Provincial Routes, compared to Summer 2014 figures**

	ROI	NI
Capacity per week - London	+10%	+23%
Capacity per week - Provincial	+2%	N/C
Total overall weekly capacity	+6%	+8%

Source: OAG/TTC Analysis

## Cross-channel (contd.)

### London Routes to NI

**The total seat capacity each week between Northern Ireland and London will be 28,605, up from 23,266 last summer - a 23% increase.**

#### Principle features/changes to last summer include:

- An increase in frequency and capacity is scheduled on routes between Belfast and London, with weekly departures up from 151 to 184, and capacity up from 21,943 to 27,282 seats per week in each direction. Capacity on London services to/from Belfast International Airport is up 15% to almost 12,500 seats per week. Capacity to London airports from Belfast City Airport is 33% up on last summer to 14,802 seats per week.
- All Heathrow services will operate to/from Belfast City Airport with Aer Lingus and BA competing with 63 departures per week between the two carriers (just over 9,500 seats) in each direction.
- Gatwick will be served by a total of 54 departures providing just under 9,000 seats per week. easyJet will continue to operate from Belfast International Airport with increased frequency, while Aer Lingus maintains an unchanged schedule from Belfast City Airport.
- The Stansted service will be maintained by easyJet from Belfast International Airport, with one additional frequency per week than last summer, to provide 3,300 seats per week.
- The Luton-Belfast International Airport service by easyJet has five additional departures per week to 3,708 seats.
- The City of Derry Airport to Stansted route, operated by Ryanair is maintained daily (1,323 seats per week).
- Belfast City Airport to London City Airport by Flybe, a new service since last summer, will provide 1,794 seats per week on 23 departures.

### Provincial Routes to NI

**A total of 416 flights per week, compared to 407 last summer, will provide just under 42,609 seats per week in each direction – a marginal increase.**

#### Principle features/changes to last summer include:

- Belfast International Airport: 122 departures per week will operate to eight routes to provincial points
- Belfast City Airport: 285 departures per week on 15 routes
- easyJet will operate all 122 departures per week from Belfast International Airport, down from 127 last summer.
- Flybe maintains all existing services from Belfast City Airport and has added a new Liverpool service (24 per week).
- Citywing is operating 20 departures per week on the Isle of Man-Belfast City Airport route, down by one since last summer.
- Ryanair, having withdrawn the Derry-Birmingham service, also operates fewer departures on Glasgow and Liverpool to City of Derry.
- Capacity on offer at Belfast International Airport is up 4% on last summer. Capacity on provincial routes is down 2% and capacity on London routes is up 15%.
- Belfast City Airport has an increase of 18% in aggregate capacity on offer; provincial routes are up 9% with capacity on London routes up 33%.
- City of Derry airport will offer 33% less capacity over last summer, due a 47% decrease on provincial routes.

### iii) North America



no change in capacity from US to NI

#### US to Northern Ireland

- United Airlines maintains its daily summer service from Newark, New York to Belfast International Airport providing 1,183 seats per week, remaining unchanged from last summer. There has been no change in capacity on this route since summer 2007.

#### US to the island of Ireland Routes

- A total of 182 departures, just over 40,000 seats per week in each direction, between the US and the island of Ireland will operate for summer 2015.
- During the peak months of June, July and August, there will be 15% more capacity on offer compared to last summer.

#### US to Republic of Ireland Routes

- Up to 175 departures per week will operate between the US and Republic of Ireland for peak summer (June/July/August) 2015. This represents just over 39,000 seats on 24 additional departures in each direction per week – a 15% increase on last summer, or just over 5,100 additional seats per week.

#### Canada to Republic of Ireland Routes

- Capacity on offer from Canada to Ireland will be 6,150 seats on 29 departures per week in each direction. This represents a 20% increase in capacity on last summer.

#### Canada to Northern Ireland Routes

- There are still no direct services available from Canada to Northern Ireland for summer 2015. There has been no change to this service since 2009.

#### One-Off Routes Announced from NI to US Outbound

- Thomas Cook Airlines announced two new international routes for the forthcoming summer schedule from Belfast International Airport to:
  - Las Vegas - one-off flight on 5th July 2015
  - Orlando, Florida – two flights will operate on 30th June and 7th July 2015.
- Virgin Atlantic has launched additional flights from Belfast to Orlando, adding 3,600 seats to/from the US over the summer.

**Table 3: Summer 2015 Seat Capacity to NI from North America compared to Summer 2014 figures**

	ROI	NI
US	+15%	N/C
Canada	+20%	0*

\* No direct flights from Canada to NI available

## Sea

### a) Cross-Channel



### Cross-Channel to NI

There is no change on Northern Ireland capacity 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.

### Ferry Operators

#### Stena Line

- A total of 40 sailings per week will operate in each direction, on the Belfast-Cairnryan, Scotland route, 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 will operate on the route between Belfast and Liverpool (Birkenhead), also remaining unchanged from last year.

#### P&O Ferries

- 53 sailings per week in each direction will operate from Larne to Cairnryan including a daily fast ferry service. Seasonal operation of P&O's fast ferry between Larne and Troon, Scotland will operate double daily 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. These services remain unchanged from last year.

#### Isle of Man Steampacket

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

### Cross-Channel to the island of Ireland

Total available car capacity (spaces) for summer 2015 to island of Ireland ports from around the world is 3% down on last summer.

### Cross-Channel to ROI

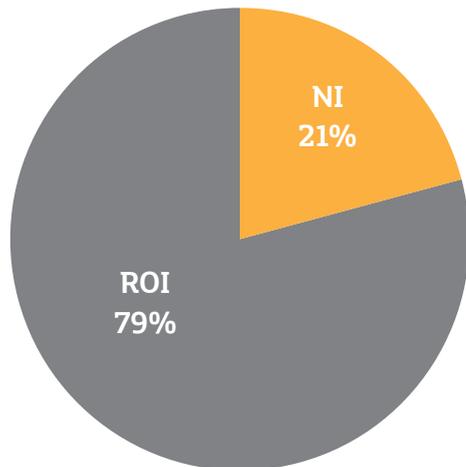
There is a 4% decrease on car capacity to Republic of Ireland routes with 112 sailings on offer to/from the Republic, with an estimated 27,500 car spaces per week.

## Summary

From the diagram below (Table 4), NI has just over a fifth of the overall total air and sea access capacity total for the island of Ireland in 2015. This represents a slight decline for Northern Ireland (2% decrease) and slight increase for Republic of Ireland (2% increase) on total capacity estimated for summer 2015, compared to last summer.

If we delve further down into these figures, Table 5 below highlights the breakdown separately by air and sea access for Northern Ireland and the Republic of Ireland with increased capacity on air services (seats) and decreased/or no change to ferry (car spaces) services:

**Table 4: Total Global Capacity (air & sea access) for the island of Ireland - Summer 2015**



**Table 5: Trends on Global Weekly Access into Ireland (Air and Sea) estimated for Summer 2015 compared to Summer 2014**

	 Ferries (car spaces)			 Air (seats)		
	2014	2015	Change	2014	2015	Change
NI	21,925	21,915	No Change	84,580	93,313	+10%
ROI	31,840	30,315	-5%	366,660	399,037	+9%

## Conclusion

- Total capacity to Northern Ireland via air and sea has seen an increase on figures for summer 2015, compared with last summer.
- Transatlantic access to Northern Ireland has increased by 15%, with United Airlines continuing their daily summer service to Belfast and the introduction of the one-off flights to Las Vegas and Orlando.
- Capacity from Europe to Northern Ireland has seen a 20% increase on 2014 figures.
- Capacity from GB to Northern Ireland has seen an 8% increase.

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

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 £723 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 our 2020 targets of 4.5m visitors and £1billion revenue.

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 Tourism Northern Ireland and Tourism Ireland to promote in-bound tourism, particularly in relation to the lucrative short break and business tourism markets.

It is encouraging to see several new routes announced for Northern Ireland this summer to Las Vegas, Orlando and Split in Croatia, along with new airlines, KLM, Vueling and Wizz Air, introducing operations into Northern Ireland for the first time. These are a positive welcome to Northern Ireland.

### **Looking to the forthcoming winter months:**

- Thomas Cook Airlines is launching a new route to the Canary Island of Fuerteventura from 4th November and an additional flight to Las Vegas on 13th November 2015.
- Thomas Cook Airlines are also introducing a new flight from Belfast to Varadero in Cuba which will begin in January 2016.
- Jet2 will launch connections with Gran Canaria, Verona and Zante in Greece later in the year.

### Sources:

- Aer Lingus
- Belfast International Airport
- City of Derry Airport
- Citywing
- easyJet
- Fáilte Ireland
- Flybe
- George Best Belfast City Airport
- Jet2
- Northern Ireland Tourist Board
- P&O Ferries
- Ryanair
- Stena Line
- Tourism & Transport Consult International - Access Summer Inventory Report 2015
- Tourism Ireland Ltd
- United Airlines
- Virgin Atlantic
- Wizz Air

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