

# Access into Northern Ireland

## Winter 2013/2014





## Introduction

Air access has been identified as one of the strategic priority areas for economic development and tourism in Northern Ireland (NI).

The maintenance of existing air routes and the introduction of new routes, particularly to Continental Europe, are vital to boosting and sustaining the NI economy.

The global economic situation has hampered the development of air transport to and from NI; while also impacting travel around the world. However, in 2003, NI had direct access to one European city. Current figures for winter 2013/14 for those flying directly into NI can access via a total of 48 destinations:

- 22 cities in Great Britain (GB)
- 23 European destinations
- One United States (US)
- Others (2 – Isle of Man and Jersey)

In addition to this, three sea routes will operate during the winter between NI and GB via:

- Larne to Cairnryan
- Belfast to Cairnryan
- Belfast to Birkenhead, Liverpool

This update provides an overview of air and sea capacity, particularly drawing comparisons between winter 2012/13 and winter 2013/14. It reviews access by type (air and sea) and access by region (GB, Continental Europe and North America).

Access to NI is achieved through NI's three airports (Belfast International Airport, George Best Belfast City Airport and the City of Derry Airport) and two seaports (Belfast and Larne).

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 that these figures are based on estimates only.**

## Key Facts

### Air



3%



in capacity to island of Ireland

9%



in capacity to Northern Ireland

The total capacity (seats on direct scheduled air services to the island of Ireland) is 3% up on last winter 2012.

- There is a 9% decrease in seats on Northern Ireland routes.
- There is a 7% increase in seats on Republic of Ireland routes.

#### Combined all-island capacity for the coming 2013/14 winter season shows:

Transatlantic routes:	11%	
European routes:	1%	
NI routes:	7%	
ROI routes:	1%	
Cross-channel routes:	2%	
and NI routes:	10%	
with ROI routes:	10%	

### Sea



99

sailings



unchanged to Northern Ireland

96

sailings



unchanged to Republic of Ireland

The total available car capacity (spaces) for winter 2013/14 between Britain and Ireland remains unchanged from last winter.

- There is no change on Northern Ireland routes, with up to 99 sailings in each direction available for tourists between Britain and NI during winter 2013/14, with just under 17,000 car spaces per week on offer.
- There is no change on car capacity to the Republic of Ireland routes with up to 96 sailings per week in each direction, offering just over 27,000 tourists car spaces.

### Airports

- Capacity on offer at **Belfast City Airport** is down 13% on last winter. Capacity on provincial routes is down 16% and London routes down 9%.
- **Belfast International Airport** has a reduction of 7% in aggregate capacity on offer, with a 4% decrease on provincial routes and 12% decrease on London routes.
- **City of Derry Airport** will offer 15% less capacity over last winter.

## i) Britain to NI

**99** sailings ↔ unchanged to NI on last winter

**17,000** car spaces per week

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, plus 13 sailings per week in each direction on the route between Belfast and Liverpool (Birkenhead).

P&O Ferries operates between:

- Larne-Cairnryan, Scotland

**46** sailings

P&O Irish Sea Ferries will operate 46 sailings per week in each direction from Larne to Cairnryan.

## ii) Britain to the island of Ireland

Available car capacity on ferry routes between Ireland and Britain, based on current published schedules, is unchanged from last winter with up to 96 sailings per week in each direction, offering a maximum of 25,260 tourist car spaces.










- Dublin-Holyhead and Dublin-Liverpool routes offer a core schedule of 68 sailings per week in each direction, with weekly maximum tourist car capacity estimated at 16,000 - unchanged from last year.
- Rosslare-Pembroke and Rosslare-Fishguard routes are offering 28 departures and capacity of up to 9,100 tourist car spaces per week in each direction - unchanged from last winter.

Table 1: Trends on Sea Access to NI from Winter 2008/09 to 2013/14

	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14
NI	20,110	18,020	18,020	16,930	16,930	16,930
ROI	27,925	30,380	28,980	27,240	27,240	27,240
Total	48,035	48,400	47,000	44,170	44,170	44,170

## i) Continental Europe to the Island of Ireland

Table 2: Winter 2013/14 Seat Capacity to island of Ireland from Europe, compared to Winter 2012/13 figures

	ROI		NI	
Total Europe		1.1%		7%
Spain		10.7%		44.7%
France		9%		No change
Germany		4.9%		No change*
Italy		11.7%		No change
Poland		11.7%		No change
Portugal		26.6%		No change
Netherlands		No change		No change

\* Still no direct access from Germany to NI

### Europe to Northern Ireland

Capacity for winter 2013/14 is up 7% compared to 2012/13.

A total of 36 flights will operate each week, offering 5,632 seats in each direction, compared to 34 departures and 5,264 seats last winter.

The main features of the schedule include:

- easyJet maintaining frequency on all routes except Geneva, which will change frequency each month.
- Jet2 introducing a new Alicante service and double frequency on remaining two routes (Lanzarote and Tenerife).
- Spain continues to be the top destination with 2,200 seats per week, a 45% year on year increase.
- Capacity on offer to the Netherlands is unchanged.
- Capacity to Switzerland is down by a third.
- All other countries will have the same capacity as last winter.

### Europe to the island of Ireland

Total weekly capacity stands at just under 108,500 seats in each direction between Ireland and mainland Europe is up 1.4% over last winter.

- 14 airlines will provide scheduled service on 86 city pair routes with 634 departures per week.
- Spain continues to be the highest route with 20,621 seats per week (up 13.5% from last winter, followed by Germany (16,794 up 4.9%), France (14,363 up 8.6%) and the Netherlands (unchanged at 10,767 seats per week).

### Europe to Republic of Ireland

The winter scheduled capacity on routes between Europe and ROI is up 1.1% on last year.

- This is an estimated weekly capacity of 102,801 seats per week on 598 departures in each direction.

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

2%



in aggregate capacity on cross channel routes

1%



on London routes

6%



on provincial routes

Cross-channel to Northern Ireland **10%** 

A capacity of 68,905 seats on 564 departures in each direction per week will be on offer, representing a 10% decrease in capacity on the latter part of last winter.

- Belfast-London routes show a decrease in frequency and capacity on routes, with weekly departures down from 191 to 181. Capacity is almost equally divided between the two Belfast airports.
- A 10% reduction in capacity between Belfast and Gatwick, despite a marginal increase by easyJet, as Flybe and Aer Lingus decrease capacity. A total of 73 departures will provide over 9,000 seats per week compared to 76 departures and almost 10,200 seats last year. easyJet will continue to operate from Belfast International Airport, Flybe and Aer Lingus will operate from Belfast City Airport. Flybe will withdraw from the route at the end of the winter schedule.
- Stansted services, operated by easyJet from Belfast International, will offer a reduced capacity of 3,744 (down 8%)
- Luton service, operated by easyJet, will be reduced from 19 to 18 departures per week with a loss of 204 seats.
- Southend service was launched by easyJet in 2012. This winter capacity will be greatly reduced from 2,208 seats to 780 seats on 5 departures. This service will be discontinued in January 2014.
- Ryanair maintains frequency on its City of Derry Airport to Stansted route.

### Cross channel to Republic of Ireland

An estimated 136,000 seats per week in each direction is available, representing a 10.2% increase on last winter.

Provincial routes to Northern Ireland **10%** 

A total of 374 flights per week, compared to 419 last winter, will provide 42,639 seats per week in each direction, a 10% reduction.

This includes:

- 145 departures per week operating from Belfast International Airport on 7 routes to provincial points. easyJet is the sole operator of services to points outside London from Belfast International Airport, since the withdrawal of Jet2.
- 215 departures per week on 13 routes will operate from Belfast City Airport. Flybe maintains all its services from Belfast City Airport but has withdrawn its Dundee service since last winter.
- Citywing (previously Manx2) operates 19 departures per week to the Isle of Man from Belfast City.
- Ryanair reduced services from City of Derry to Preswick (7 to 5), Birmingham (4 to 3) and Liverpool (7 to 6).
- Jet2 has withdrawn its Belfast International to Leeds Bradford service.

### Provincial routes to Republic of Ireland

Cross-channel services operate to 17 airports outside London from ROI airports on a total of 37 routes. Total capacity on offer is 21% above last winter, with 63,670 seats per week on 517 departures.

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

#### US to the island of Ireland Routes

Aggregate air service capacity between US and the Island of Ireland for winter 2013/14 will be up to 88 departures and up to 21,300 seats per week in each direction during November/December 2013. This drops close to 17,000 seats per week over the January-March period 2014.

#### US to Republic of Ireland Routes

The winter schedule provides for up to 83 departures per week, offering just under 20,500 seats per week in each direction, which is 7 more departures per week and 12% more seats (approx. 2,200 additional seats per week), compared to last winter.

#### US to Northern Ireland Routes

United will maintain up to 5 services per week from Newark to Belfast, providing 845 seats per week, unchanged from last winter. This is the fifth winter in succession this figure has remained unchanged.

#### Canada to Northern Ireland Routes

No scheduled services or charter services will operate during the winter period.

**Table 3: Capacity (seats per week) for Winter 2013/14 from US & Canada to island of Ireland, compared to Winter 2012/13:**

	ROI	NI
US	12% increase	No change
Canada	0*	0**

\* No scheduled services or charter services will operate during the winter period.

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

## Summary

The Northern Ireland Tourist Board (NITB) highlights 'Easy access and convenient transport' as one of six key visitor expectations in their Campaigning for Tourism initiative. Our visitors expect to see:

- A wide choice of air and sea routes at competitive prices
- A high standard of road networks to key tourism attractions
- Integrated, visitor focused travel options across Northern Ireland
- Streamlined visa arrangements between the UK and Republic of Ireland.

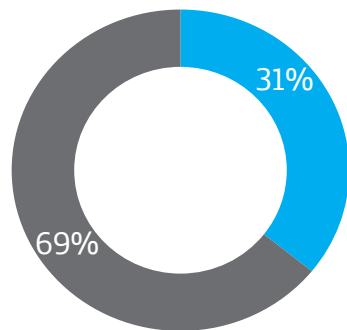
NITB are taking this initiative forward and full details can be viewed on [www.nitb.com/valuingtourism](http://www.nitb.com/valuingtourism).



From Table 4, below, it is clearly depicted that Northern Ireland has a third of the total overall capacity (air and sea) for the island of Ireland for the winter 2013/14 period. This represents a small 2.8% increase in access to the island of Ireland from last winter.

While sea access capacity remains unchanged from winter 2012/13, air access has declined by 9%. This continues to be a challenge for Northern Ireland as NITB and Tourism Ireland Ltd focus on increasing direct access air routes, especially from European countries.

In October 2013, the Irish Government abolished air tax completely in the Republic of Ireland. This offers a strong marketing incentive for travel to the Republic of Ireland. Politicians and business groups in Northern Ireland have raised concern about the impact of this on Northern Ireland, where short haul Air Passenger Duty currently stands at £13 per person.

**Table 4 : Total Global Capacity (air & sea access) for the island of Ireland 2013/14**



	 Cars (car spaces)	 Air (seats)	Total
<b>NI</b>	16,930	75,382	92,312
<b>ROI</b>	27,240	265,449	292,689

### Sources:

- Tourism & Transport Consult International - Access Winter Inventory Report 2013/14
- Northern Ireland Tourist Board
- Tourism Ireland Ltd
- Failte Ireland
- George Best Belfast City Airport
- Belfast International Airport
- City of Derry Airport
- United Airlines
- Jet2
- easyJet
- Flybe
- Aer Lingus
- Citywing
- Ryanair

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