

# **Access into Northern Ireland**

## **Winter 2014/15**

## 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 winter 2014/15 indicate that Northern Ireland has direct air access to 45 destinations.**

## 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 are vital to boosting and sustaining the NI economy.

NI is well connected to Great Britain but scope exists to grow inbound tourism by introducing more direct routes from European cities, including the key German market. North America is a major market for growth but currently has only one direct (Belfast-Newark) route and none from Canada. However, a new Virgin Atlantic Orlando to Belfast route is commencing in June 2015 for a four week period.

In 2003, NI had direct access to one European city. Current access figures for winter 2014/15 for direct flights into NI total 45 destinations:

- 22 cities in Great Britain (GB)
- 20 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 Access into NI Winter 2014/15 update provides an overview of air and sea capacity, particularly drawing comparisons between winter 2013/14 and estimated figures for winter 2014/15. It reviews access by type (air and sea) and by region (GB, Continental Europe and North America).

Access into NI is achieved via 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 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 the ROI can act as a gateway to NI for tourists.

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

## Key Facts

Air



**8%** ↑ in capacity to island of Ireland

**3%** ↑ in capacity to Northern Ireland

- Total available capacity on direct scheduled air services to the island of Ireland for the winter season 2014/15 is 8% up on last winter.
- There are 9% more seats on Republic of Ireland (ROI) routes and 3% more on Northern Ireland (NI) routes.
- Aggregate capacity is now level with 2005 figures.

Sea



**99** ↔ unchanged to Northern Ireland  
sailings

**105** ↑ **4%** to Republic of Ireland  
sailings

- A core schedule of 99 sailings per week in each direction will provide up to 17,000 car spaces per week into NI, unchanged from last year. There has been no change to this schedule since winter 2011/12.
- Up to 105 sailings per week in each direction will operate to the ROI, offering up to a maximum of 26,000 tourist car spaces, a 4% increase on last winter.

### Capacity changes for the coming 2014/15 winter season show:

Transatlantic routes (island of Ireland):	<b>11%</b> ↑	US routes:	<b>4%</b> ↑
European routes:	<b>8%</b> ↑		
NI routes:	<b>34%</b> ↓		
ROI routes:	<b>11%</b> ↑		
Cross-channel routes:	<b>5%</b> ↑		
NI routes:	<b>6%</b> ↑		
ROI routes:	<b>5%</b> ↑		

## Airports

- **Dublin Airport continues to be the principal port**, with almost 9 out of every 10 seats on offer on European routes. Cork offers almost 5% and **Belfast offers 3% share of weekly capacity**. Shannon, following a 300% increase in capacity has a 2% share. Kerry and Knock each account for less than 1% capacity share.
- Capacity on offer at **Belfast City Airport is up 17%** on last winter. Capacity on provincial routes is up 18% and London routes up 15%.
- **Belfast International Airport has a reduction of 3%** in aggregate capacity on offer, with an 8% decrease on London routes, while capacity on offer to provincial routes is unchanged.
- The **City of Derry Airport will offer 4% more** capacity over last winter, due to increased service to Glasgow.

## a) Continental Europe

**34%** ↓ in capacity from Continental Europe to NI

## Continental Europe to Northern Ireland

Capacity for winter 2014/15 is down by 34% compared to last winter, a decrease of 1,912 seats per week.

Twenty four flights will operate between NI and European gateways each week, offering 3,720 seats in each direction, compared to 36 departures and 5,632 seats last winter.

The changes in recent route network and service frequency are:

- easyJet will operate 21 departures per week providing 3,276 seats. They have trimmed capacity on 6 of its 9 routes and withdrawn its Belfast to Barcelona service. A new service from Belfast to Reykjavik, Iceland will operate twice weekly.
- Jet2 will not operate to Alicante this winter and will reduce its Lanzarote service to weekly. The Belfast-Tenerife service will operate twice weekly, unchanged from last winter.

## Capacity by Country to Northern Ireland

- Spain, despite a 52% decrease in capacity, continues to be the top destination with 1,068 seats per week, accounting for 29% of the mainland European capacity on offer.
- The Netherlands is the second highest volume route with 780 seats per week, down 29% from last year, due to easyJet dropping 2 flights per week.
- Capacity on offer to France and Portugal is unchanged from last winter.
- The easyJet service to Iceland is a new route, commencing in December 2014.

## Continental Europe to the island of Ireland

Total weekly capacity at 117,588 seats in each direction between the island of Ireland and mainland Europe is on offer, up 8.4% over last winter.

Spain continues to be the highest volume route with 21,123 seats per week (up 2% from last winter), followed by Germany (17,633 up 5%), France (15,573 up 9%) and the Netherlands (down 5% to 10,281 seats per week in each direction).

## Continental Europe to Republic of Ireland

The winter scheduled capacity on routes between Europe and ROI is up 10.8% on last year.

The estimated weekly capacity for the current winter schedule is 113,868 seats per week on 660 departures in each direction.

**Table 1: Winter 2014/15 Seat Capacity to NI by country from Continental Europe, compared to Winter 2013/14 figures**

	2013/2014	2014/15	% Change
<b>Total</b>	5,632	3,720	↓ 34%
<b>Spain</b>	2,200	1,068	↓ 52%
<b>Netherlands</b>	1,092	780	↓ 29%
<b>France</b>	624	642	↔ NC
<b>Iceland</b>	-	312	N/A
<b>Poland</b>	468	312	↓ 33%
<b>Portugal</b>	312	312	↔ NC
<b>Malta</b>	312	156	↓ 50%
<b>Switzerland</b>	624	156	↓ 75%

Source: TTC

## b) Cross-channel



### Cross-Channel to Northern Ireland

A capacity of 72,994 seats on 602 departures in each direction per week will be on offer this winter, a 6% increase in capacity on the latter part of last winter. Capacities on services to/from London and provincial points to NI are up 4% and 7% respectively on last winter.

### Cross-channel to island of Ireland

Capacity on cross-channel routes from Ireland is up 5% over last winter, with 8% more capacity on London routes and 3% more on provincial routes.

### Cross-channel to Republic of Ireland

Capacity on cross-channel routes is estimated at close to 143,000 seats per week in each direction, a 5% increase on last winter.

There is a 10% increase in capacity on London routes and no change on routes from provincial airports.

**Table 2: Winter 2014/15 Seat Capacity to NI from London and Provincial Routes, compared to Winter 2013/14 figures**

	2013/14	2014/15	% Change
Capacity per week - London	26,266	27,225	↑ 4%
Capacity per week - Provincial	42,639	45,769	↑ 7%
<b>Total overall weekly capacity</b>	<b>68,905</b>	<b>72,994</b>	<b>↑ 6%</b>

Source: OAG/TTC Analysis

## b) Cross-channel (contd.)

### London Routes to NI

The total seat capacity each week between NI and London will be 27,225, up from 26,266 last winter, representing a 4% increase.

Frequency on London routes has decreased from 190 to 180 departures per week in each direction. The changes compared to last winter include:

- Belfast-London services decrease in frequency, with a slight increase in capacity. Weekly departures are down from 181 to 171. Capacity increases from 24,565 to 25,524 seats per week. Belfast City Airport will offer 56% of capacity from Belfast to London.
- All Heathrow services will operate to/from Belfast City Airport with Aer Lingus and BA, with 61 departures between the two carriers offering over 9,000 seats per week in each direction, representing an increase of 1,000 seats.
- The Belfast and Gatwick route has a 9% reduction, despite a marginal increase by Aer Lingus, following the withdrawal of Flybe's service from Belfast City. 51 departures from both Belfast airports will provide almost 8,400 seats per week compared to 73 departures and almost 9,200 seats last year.
- Stansted services, operated by easyJet from Belfast International, will offer an unchanged capacity of 3,744.
- The Luton service, operated by easyJet, will be reduced from 18 to 17 departures per week, representing a loss of 108 seats.
- The Southend service, launched by easyJet in 2012, has been discontinued.
- A new service from London City to Belfast City will be operated by Flybe, with 18 departures per week.
- Ryanair maintains frequency on its City of Derry Airport to Stansted route at 9 departures per week.

### Provincial Routes to NI

A total of 422 flights per week, compared to 374 last winter, will provide 45,769 seats per week in each direction, a 7% increase.

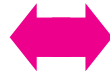
The main features of the winter schedule are:

- 145 departures per week operated from Belfast International by easyJet on 7 routes to provincial points remains unchanged from last winter.
- 262 departures per week on 13 routes will operate from Belfast City. Flybe maintains all its services from Belfast City Airport, while Citywing continues its service to the Isle of Man, including the recently announced new service from Belfast to London City.
- Ryanair increases City of Derry-Glasgow service by one per week and moves from Prestwick to Glasgow International. Services from City of Derry to Liverpool will operate the same capacity as last winter. Ryanair will cease the City of Derry to Birmingham service as of 20 November.

### Airlines Cross-Channel to NI

- **British Airways** will operate Belfast City-Heathrow route. While frequency is unchanged, capacity is above last winter.
- **Aer Lingus** will operate a triple daily frequency to/from Heathrow, unchanged from last winter, and to/from Gatwick which will increase in capacity due to increased frequency and a change of operating aircraft on the Gatwick route - representing an extra 1,300 seats.
- **easyJet** will operate 30 departures per week from Belfast International to Gatwick, and 24 to Stansted, unchanged from last winter. Service from Belfast International to Luton is slightly reduced and the service from Belfast International to Southend has been withdrawn.
- **FlyBe** has withdrawn service from Belfast City to Gatwick. It is operating service from Belfast City to London City offering 1,404 seats per week on 18 departures.
- **Ryanair** will operate 9 departures per week from City of Derry Airport to Stansted, unchanged from last year.

### iii) North America



no change in capacity from US to NI

#### US to Northern Ireland

United Airlines' Newark-Belfast service will maintain up to 5 departures per week from the end of October to early January and in March, but the service will be suspended over the period 5th January to early March\*.

This service will provide 845 seats per week which is unchanged from last year.

#### US to the island of Ireland Routes

Air services between the US and the island of Ireland will be up to 93 weekly departures offering over 22,000 seats per week in each direction during the November/December 2014 period, an increase of 4% on the corresponding period last year.

Service over the January-March period 2015 will be reduced to 62 departures per week\*, before expanding to over 75 departures most weeks in March.

#### US to Republic of Ireland Routes

The core winter schedule, as currently planned, provides for up to 88 departures per week, offering a maximum of approximately 21,000 seats, in each direction. The net change from last winter is 5 more departures per week providing a 4% increase in capacity over the core schedule period, or approximately 900 more seats per week in the periods November/December 2014 and March 2015.

As in previous years the frequency and capacity will be reduced for the period January to March 2015\*. The number of departures per week over the soft period will be up to 62 per week, a net change of 5 less departures per week over the period, providing approximately 15,000 seats per week, a 6% decrease in capacity compared to the same period in 2014.



\* These route suspensions are normal practice, due to less travel during the winter months.

# Sea

## a) Cross-Channel

**99**  
sailings



unchanged to NI on last winter

**17,000**  
car spaces per week

### Cross-Channel to NI

A core schedule of 99 sailings per week in each direction will provide up to 17,000 car spaces per week. The winter schedule is unchanged from last year. There has been no change to this schedule since winter 2011/12 (See Table 3 below).

### Cross-Channel to ROI

Up to 105 sailings per week in each direction will operate over the winter period, offering up to a maximum of 26,000 tourist car spaces, a 4% increase on last winter.

## Ferry Operators

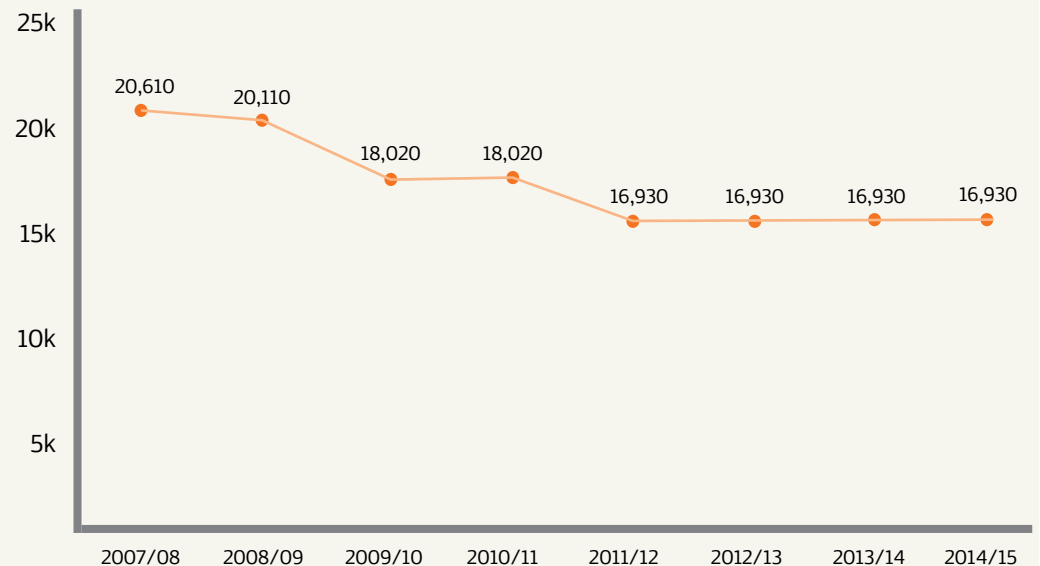
### Stena Line

- A total of 40 sailings per week will operate in each direction between Belfast and Cairnryan
- 13 sailings per week in each direction will operate on the route between Belfast and Liverpool (Birkenhead).
- Frequency and capacity is unchanged from last year.

### P&O Ferries

- A total of 46 sailings per week in each direction from Larne to Cairnryan will operate, also unchanged from last year.
- Seasonal operation of P&O's fast ferry from Larne to Cairnryan and to Troon are withdrawn as in previous winters.

**Table 3: Trends on Ferry Services (Capacity) to NI from 2007/08 to 2014/15**





## Summary

The Northern Ireland Tourist Board continues to highlight 'Easy access and convenient transport' in its 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.

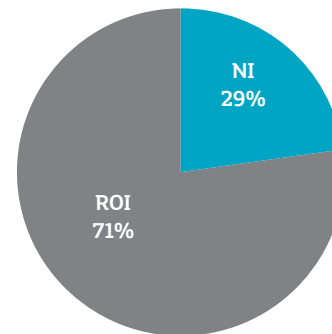
This report highlights that, while sea access capacity has remained unchanged since winter 2011/12, air access shows signs of improvement with a 3% increase in capacity to NI and 8% into the island of Ireland. Table 4 below shows the Air and Sea Global Weekly Access into Ireland - with NI representing just under one third of the island of Ireland total.

As we look forward, new routes announced for the 2015 international schedule include new routes from Reykjavik, Iceland; Vilnius, Lithuania and Zante, Greece. Gran Canaria, Katowice, Orlando, Prague and Rome also make a welcome return to NI. The Mayor of Boston, Marty Walsh, is also supporting a Boston to NI route and low cost Spanish airline Veuling is to operate in NI for the first time as it announced a service between Barcelona and George Best Belfast City Airport starting in May 2015.

**Table 4: Trends on Global Weekly Access into Ireland (Air and Sea) for 2014/15 compared to 2013/14**

	Ferries (car spaces)			Air (seats)		
	2013/14	2014/15		2013/14	2014/15	
NI	16,930	16,930	No Change	75,382	77,559	+3%
ROI	27,240	28,000	+3%	265,449	289,538	+9%

**Total Global Capacity (air & sea access) for the island of Ireland 2014/15**



### 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 Winter Inventory Report 2014/15
- Tourism Ireland Ltd
- United Airlines
- Virgin Atlantic
- Wizz Air

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