Air & Sea Access

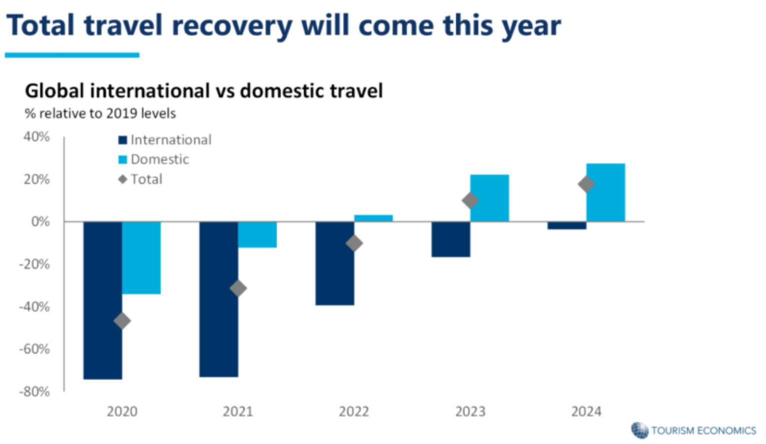
Planned Capacity for Summer 2023 (Apr – Oct)

With the peak tourism season under way, we look at air and sea access to the Republic of Ireland for Summer 2023. Air access accounts for 80% of planned capacity between the months of April and October 2023 with the remaining 20% being provided by ferry operators.

Global Travel

- 2023 is set to be the year for air travel recovery with all world regions now open to international travel.

- On week starting June 26th, global air capacity was 2.5% below where it was in the same week in 2019 (OAG).



Summer Access to Republic of Ireland (ROI)

Planned Seat Capacity by Main Market

Market	Seat Capacity	As Proportion of 2019 Capacity
Great Britain	5M	102%
Mainland Europe	7.8M	104%
North America	1.7M	98%
Rest of World	0.6M	111%
All	**15.1M**	**103%**

Source: OAG

- Air access to ROI was above the European average during Qtr 1 2023, reaching 102% of its 2019 seat capacity level vs. 92% for Europe (IATA).
- Planned seat capacity to ROI for **Summer 2023** is expected to be at **103% of its 2019 levels**, with an average of **500K seats per week**.
- Looking at the main markets, seat capacity is due to be above its 2019 levels for **Rest of World** (**111%**), **Mainland Europe** (**104%**) and **Great Britain** (**102%**) this summer while **North America** is very close to a full recovery (**98%**).

Air Access from Republic of Ireland's key markets

Headlines

- **GB** is the market with the largest seat capacity to ROI offering on average 170,000 seats weekly across all six regional airports this summer.
- Planned seat capacity from the **US** is now close to its 2019 levels (99%) with 6 in 10 flights operated by Aer Lingus.
- Capacity from **France** this summer is 19% above its 2019 levels with a total of 28 routes and 190 weekly flights.
- **Germany** is mainly connected to Dublin airport (96% of capacity) and is operating at 77% of its 2019 capacity levels.

GB

- **Access recovery (of 2019 levels):** 102%
- **Average weekly seats**: 170,000
- **Average weekly flights**: 1,060
- **Routes**: 55
- **Net change vs. 2019:** -4 routes
- **Airports' capacity share:** 73% Dublin / 11% Cork / 7% Shannon / 6% Knock / 2% Kerry / (0.03% Donegal)
- **Airlines' capacity share:** 64% Ryanair / 30% Aer Lingus / 6% British Airways / less than 1%: 4 other airlines combined

US

- **Access recovery (of 2019 levels):** 99%
- **Average weekly seats:** 50,000
- **Average weekly flights**: 210
- **Routes**: 20
- **Net change vs. 2019**: -2 routes
- **Airports' capacity share**: 91% Dublin / 9% Shannon
- **Airlines' capacity share**: 62% Aer Lingus / 15% United Airlines / 13% American Airlines / 11% Delta Airlines

France

- **Access recovery (of 2019 levels):** 119%
- **Average Weekly seats:** 33,000
- **Average Weekly flights**: 190
- **Routes**: 28
- **Net change vs. 2019**: +4 routes
- **Airports' capacity share**: 90% Dublin / 6% Cork / 3% Shannon / less than 0.5% Kerry
- **Airlines' capacity share**: 44% Ryanair / 36% Aer Lingus / 10.5% Air France / 5.5% Vueling Airlines / 3% Transavia.com France / less than 0.5% Chalair

Germany

- **Access recovery (of 2019 levels):** 77%
- **Average Weekly seats**: 26,000
- **Average Weekly flights**: 150
- **Routes**: 13
- **Net change vs. 2019**: 0
- **Airports' capacity share**: 96% Dublin / 2% Kerry / 1% Cork / 1% Knock
- **Airlines' capacity share**: 38% Aer Lingus / 30% Ryanair / 27% Deutsche Lufthansa AG / 4% Eurowings

Source: OAG

Sea Access

- **Maximum passenger capacity on board ferries to the Republic of Ireland is estimated at 127,000 per week from April to June and at 118,000 for the rest of the summer.**
- Although still below its 2019 levels overall (-8%), scheduled sea capacity is due to increase between July and October up to 15,000 passengers (+33% vs. 2019) on the Continental corridor while capacity on the Cross Channel corridor is down 19,000 (-15%) from July to October vs. 2019.

Weekly Summer Passenger Capacity by Corridor

Corridor	Weekly Passenger Capacity	vs. 2019	Weekly Passenger Capacity	vs. 2019
Period	April - June		July - October	
Cross Channel	115K	-6%	103K	-15%
Continental	12K	+9%	15K	+33%
All	**127K**	**-4%**	**118K**	**-11%**

Source: Ferry operators

For more detail on the Inbound Air & Sea Access dashboard: **click here**