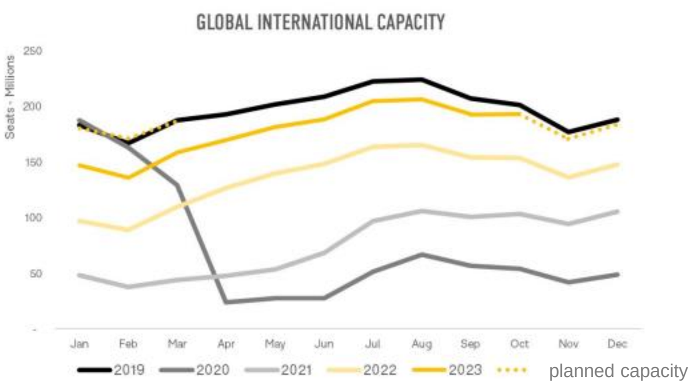
Air & Sea Access

Planned Capacity for Winter 2023/24 (Nov – Mar)

Following a Summer season that saw its overall seat capacity to the Republic of Ireland surpass its 2019 levels, we now look at planned air and sea capacity for the Winter 2023/24 season.

Global Air Capacity

- Globally, seat capacity for the 2023 Summer season was 1% below its 2019 levels - driven by domestic flights.
- Air capacity was 3% below its Summer 2019 levels in Europe, while it was 3% above in the Republic of Ireland.
- Global capacity for Q1 2024 is expected to be 3% above 2019, with international capacity close to reaching its 2019 levels.



Source: OAG

Winter Access to Republic of Ireland (ROI)

Planned Winter Capacity by Main Market

Market	Seat Capacity	Diff vs. 2019/20	Diff vs. 2022/23
Great Britain	3.2M	+1%	+5%
Mainland Europe	4.1M	+18%	+12%
North America	0.8M	+8%	+13%
Rest of World	0.4M	+35%	+18%
All	**8.5M**	**+11%**	**+10%**

Source: OAG

- **2023 Overview**: air access to ROI for 2023 - which accounts for 80% of all capacity - is **3% above its 2019 levels**.
- Planned seat capacity for **Winter 2023/24** is expected to be at **11% above of its 2019/20 levels** and 10% above the same period last year; with an average of 387,000 seats to ROI weekly.
- Access from all main markets is due to have fully recovered this coming Winter season. **Growth in seat capacity is mostly led by the European market** although it is expected to occur across all main markets.

Air Access from Republic of Ireland's Key Markets

Headlines

GB is the market that is the most connected to airports outside Dublin, offering a weekly average of 35,000 combined seats to Cork, Shannon, Knock and Kerry this winter.

Capacity from the **US** this winter is expected to average at 34,000 seats weekly - 8% above its 2019/20 levels - with 73% of seats being serviced by Aer Lingus.

Access from **France** is due to be 19% above its 2019/20 capacity levels with 21,000 weekly seats across 23 routes, corresponding to a net increase of 10 routes.

Germany, which has not yet recovered from pre-pandemic levels, will provide similar seat capacity to France and will be connected to Dublin, Cork and Kerry airports.

Key Market Summary

Great Britain

- **Access recovery vs. 2019:** +1%
- **Average weekly seats:** 148,000
- **Average weekly flights:** 928
- **No. of routes:** 54
- **Net change vs. 2019:** -2 routes
- **Airports' capacity share:** 76% Dublin / 11% Cork / 6% Shannon /5% Knock / 1% Kerry
- **Airlines' capacity share:** 59% Ryanair / 32% Aer Lingus / 8% British Airways / less than 1% made up of three other airlines

United States

- **Access recovery vs. 2019:** +8%
- **Average weekly seats:** 34,000
- **Average weekly flights:** 138
- **No. of routes:** 18
- **Net change vs. 2019:** +3 routes
- **Airports' capacity share:** 93% Dublin / 7% Shannon
- **Airlines' capacity share:** 73% Aer Lingus / 11% American Airlines / 9% Delta Air Lines / 8% United Airlines

France

- **Access recovery vs. 2019:** +19%
- **Average weekly seats:** 21,000
- **Average weekly flights:** 117
- **No. of routes:** 23
- **Net change vs. 2019:** +10 routes
- **Airports' capacity share:** 95% Dublin / 3% Cork / 2% Shannon
- **Airlines' capacity share:** 37% Ryanair / 34% Aer Lingus / 15% Air France / 7% Vueling Airlines / 6% Transavia.com France / 1% TUI Airways

Germany

- **Access recovery vs. 2019:** -18%
- **Average weekly seats:** 20,000
- **Average weekly flights:** 118
- **No. of routes:** 11
- **Net change vs. 2019:** n/a
- **Airports' capacity share:** 97% Dublin / 2% Kerry / 1% Cork
- **Airlines' capacity share:** 44% Aer Lingus / 31% Deutsche Lufthansa AG / 25% Ryanair

Source: OAG

Winter Sea Access to Republic of Ireland (ROI)

- Ferry capacity to ROI for the Winter 2023/24 season, which represents 20% of all capacity to ROI (air and sea), is set to be at 95,000 passengers per week, which has reduced compared to previous Winter schedules.

- This decrease has been driven by less capacity on the Cross Channel corridor, despite an increase in capacity from Continental routes.

Winter Ferry Passenger Capacity Comparison (weekly capacity)

Sailing Corridor	Passenger Capacity	Diff vs. 2019/20	Diff vs. 2022/23
Cross Channel	83,400	-35%	-20%
Continental	11,600	+222%	+23%
All	**95,000**	**-28%**	**-16%**

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