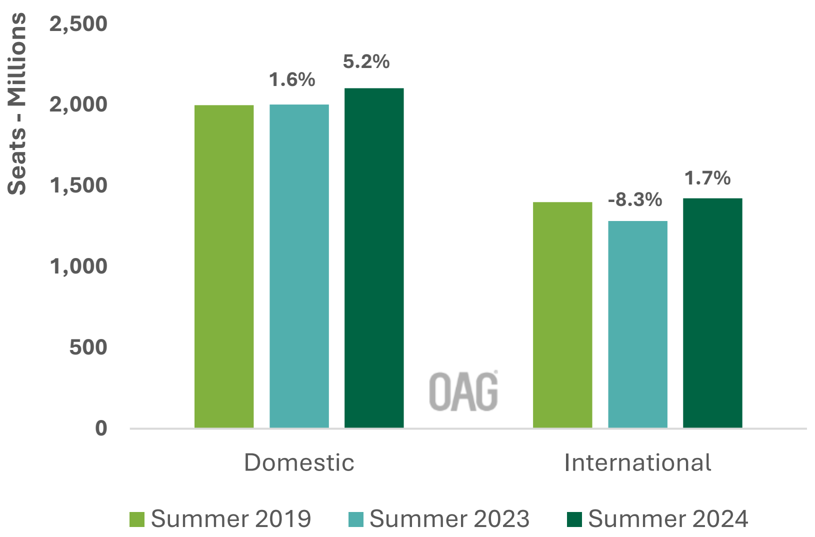
Air & Sea Access
Planned Capacity for Summer 2024 (Apr-Oct)

Overview of Summer Air Capacity

Global Air Travel

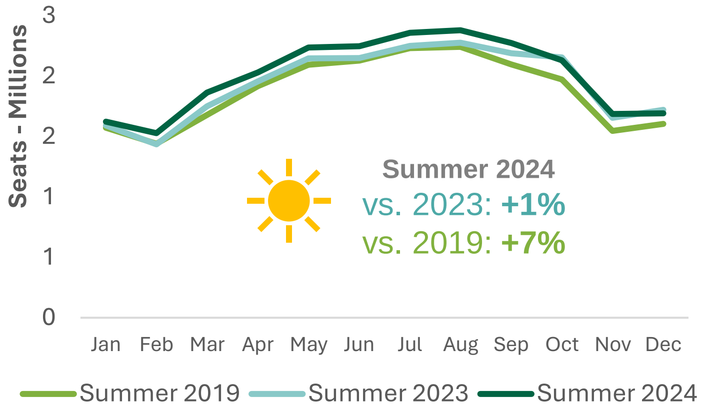
- As of May 2024, global air seat capacity for the summer season was expected to be 3.7% ahead of Summer 2019.
- There is however still a lag between domestic & international capacity:
  - International seat capacity is slightly above Summer 2019 levels (+1.7%)
  - Domestic capacity is expected to be 5.2% higher.

Domestic & International Capacity 2024 vs. 2019



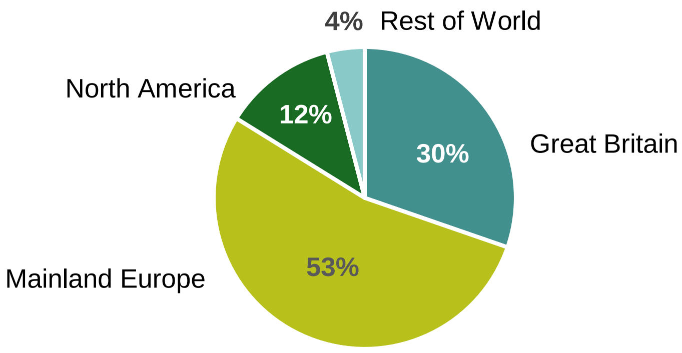
Summer Air Access to Republic of Ireland (ROI)

2024 Seat Capacity to ROI vs. 2023 & 2019



- Growth in seat capacity is expected to continue this Summer from Mainland Europe (+3%), North America (+9%) and Rest of World (+11%) markets.
- However, access from Great Britain has decreased from last summer (-7%), now accounting for 30% of all capacity to ROI.

Share of Seats by Main Market



Change in Capacity by Main Market vs. 2023

Main Market	Change vs. Summer 2023
Great Britain	-7%
Mainland Europe	+3%
North America	+9%
Rest of World	+11%
All Markets	**+1%**

Source: OAG

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Fáilte Ireland

Summer Access to Republic of Ireland (ROI): Average Weekly Capacity by Key Market

Summer Air Access from ROI's Key Markets

- Despite a decrease in capacity compared to last year, **GB** remains by far the single source market with the largest number of seats, flights and routes to ROI, which are mostly operated by Ryanair (62%) and Aer Lingus (31%).

- Access from the **US** has expanded further this summer with an average of 55,300 seats weekly, three new routes (*from Denver, Las Vegas and Minneapolis*) and an additional airline (*Jet Blue*) operating flights from Boston and New York.
- Seat capacity from the US market has increased 7% at Dublin airport and 18% at Shannon airport.

- Seat capacity from **France** has increased again this summer providing an average of 33,700 seats weekly from 20 different destinations connecting to four Irish airports.

- Air capacity to ROI from **Germany** used to be the largest among all European markets but is now behind France and Italy with an average 26,300 scheduled seats per week over the summer season.

Source: OAG

Summer Sea Access to ROI

- Sea access to ROI this summer is scheduled to be 3% above last year's levels with an estimated capacity of 3.9mn passengers.

- While this is an improvement on last summer, it remains 4% lower than Summer 2022 when planned sea capacity was at its highest, surpassing its Summer 2019 levels due to added capacity on continental routes.

Weekly Summer Passenger Capacity to ROI by Sailing Corridor

Corridor	One-way Weekly Sailings	One-way Weekly Passenger Capacity
Cross Channel	94	114,700
Continental	15	16,200
All	**109**	**130,900**

Source: Ferry operators

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

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Fáilte Ireland

Summer Capacity to ROI by Key Source Markets vs. 2023 – Excluding Scheduled Seats on Sun Routes

Summer Access to ROI

80% of scheduled access to Ireland comes from **air capacity**.

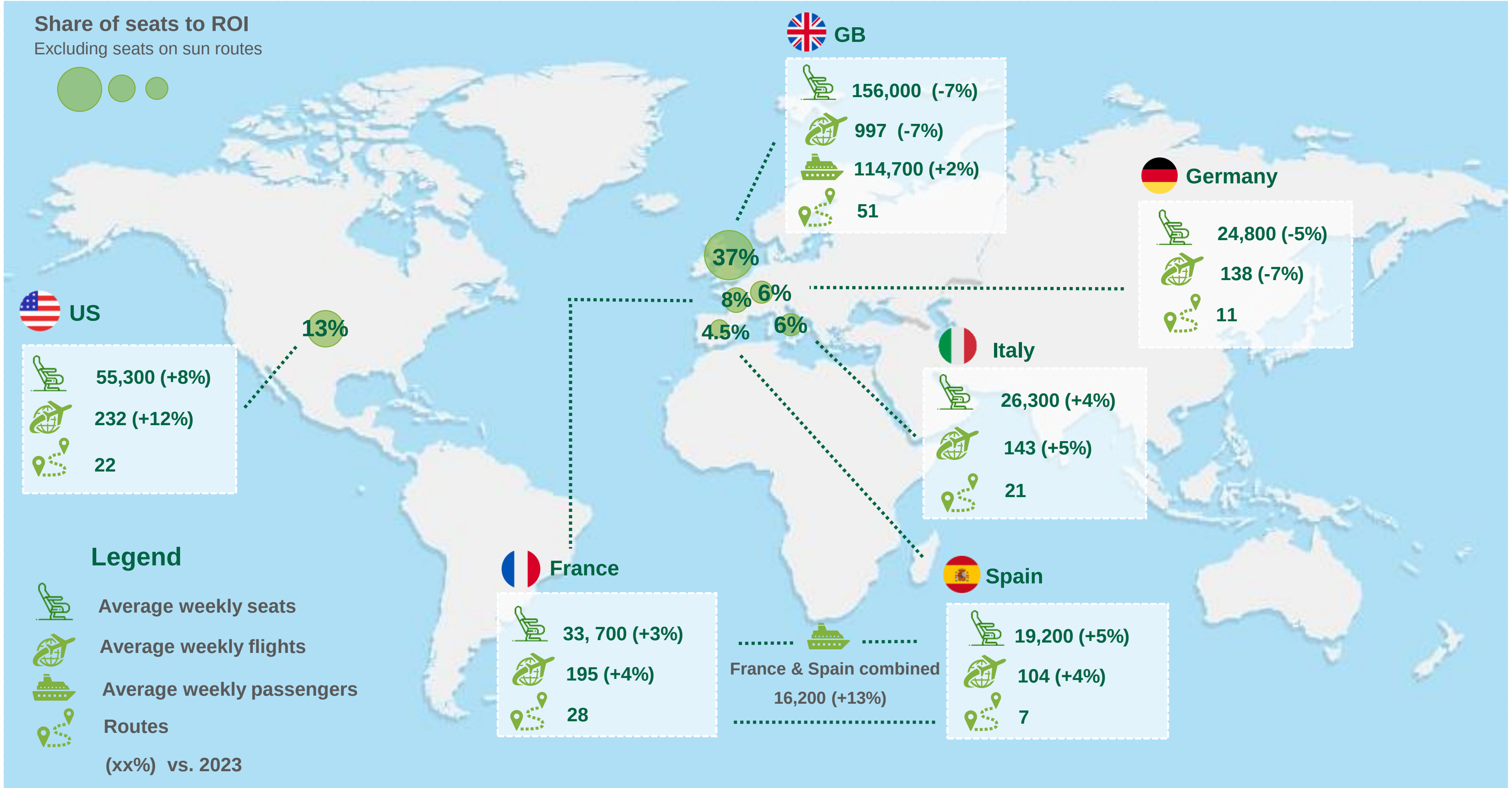
18% of air capacity is scheduled on **sun routes** and is therefore more directed towards domestic outbound travel (this is excluded from the map).

422,500
Average weekly seats

2,380
Average weekly flights

130,900
Average weekly passengers

205
Routes



Source: OAG