

# IRELAND'S MAIN AIRPORTS AN ECONOMIC PROFILE (2017)

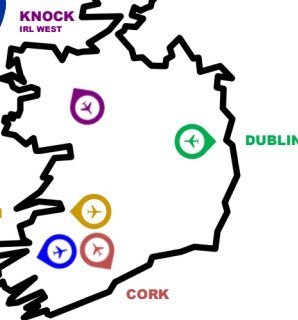
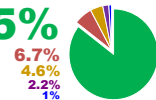
## ALL MAIN AIRPORTS

### PASSENGERS (TOTAL)

**34.4m**

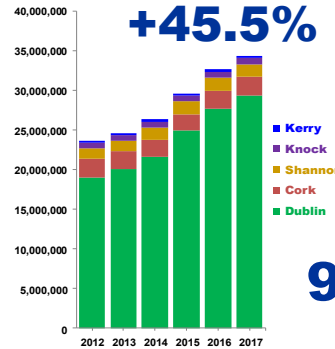
**DUBLIN 29.4m**  
**CORK 2.3m**  
**SHANNON 1.6m**  
**KNOCK 0.75m**  
**KERRY 0.34m**

**85.5%**  
In percentage terms...



### PASSENGERS CHANGE SINCE 2012

**+45.5%** (10.8m)



**96.2%**  
of this growth was at Dublin Airport

### ECONOMIC IMPACT

**€12.8bn**

6.4% of Ireland's GNI\*  
4.3% of Ireland's GDP



### EMPLOYMENT



**143,745**

Total employment (21,635 are directly employed)

### CONNECTIVITY

**267**

Number of Scheduled routes served from all main Irish airports

## DUBLIN AIRPORT

### PASSENGERS

**29.4m**

This represents a +54% increase since 2012. Dublin Airport processes:

**85.5%**  
of all passengers at the main Irish airports

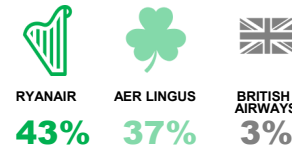
**85%** Short haul  
**15%** Long haul

Dublin Airport had the busiest year in its 78 year history in 2017



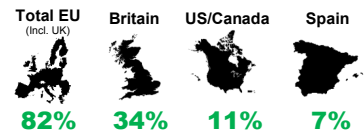
Source: CSO Aviation Statistics (April 2018)

### MAIN CARRIERS BY TOTAL SEAT CAPACITY\*



Source: DAA InterVISTAS report (2017). \*Note: Refers to 2016 figures

### MAIN MARKETS IN & OUTBOUND



### TOP ROUTES BY PASSENGERS (ARRIVALS AND DEPARTURES)

1	London (Heathrow)	1.8m
2	London (Gatwick)	1.37m
3	Amsterdam	1.09m
4	Manchester	979,997
5	Birmingham	912,428



Source: CSO Aviation Statistics (April 2018)

### ECONOMIC IMPACT

**€8.3bn**

4.1% of Ireland total GNI\*  
2.8% of Ireland's total GDP



Source: DAA InterVISTAS report (2017), p. 29, and L&RS estimate.

### EMPLOYMENT



**117,300**

Total employment (19,200 are directly employed)

Source: DAA InterVISTAS report (2017), p. 29

### CONNECTIVITY

**19<sup>th</sup>**

Most (directly) connected airport in Europe

Source: ACI Report (2018)

**176**

Number of scheduled destinations served by 41 airlines

Source: DAA 2017 Annual Report (2018), p.25

## CORK AIRPORT

### PASSENGERS

**2.3m**

This represents a -1.4% decrease since 2012. Cork Airport processes:

**6.7%**  
of all passengers at the main Irish airports

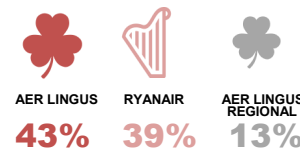
**99%** Short haul  
**<1%** Long haul

Cork Airport's busiest year was in 2008, with 3.26m passengers



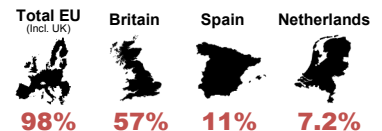
Source: CSO Aviation Statistics (April 2018)

### MAIN CARRIERS BY TOTAL SEAT CAPACITY



Note: L&RS estimate based on published 2017/2018 summer / winter flight schedules, average frequency, and 2017 load factor for each airline

### MAIN MARKETS IN & OUTBOUND



### TOP ROUTES BY PASSENGERS (ARRIVALS AND DEPARTURES)

1	London (Heathrow)	401,315
2	London (Stansted)	353,001
3	Amsterdam	168,146
4	Malaga	137,158
5	London (Gatwick)	125,585



Source: CSO Aviation Statistics (April 2018)

### ECONOMIC IMPACT

**€727m**

Source: DAA InterVISTAS report



### EMPLOYMENT



**10,710**

Total employment (1,920 are directly employed)

Source: DAA InterVISTAS report (2015), p. ii

### CONNECTIVITY

**39**

Number of scheduled destinations served by 9 airlines

Source: DAA 2017 Annual Report (2018), p.9

# SHANNON AIRPORT

## PASSENGERS

Shannon Airport's busiest year was in 2006, with **3.6m** passengers

**1.6m**

This represents a **+24.4%** increase since 2012. Shannon Airport processes:

**4.6%** of all passengers at the main Irish airports

**75%** Short haul  
**25%** Long haul

Source: CSO Aviation Statistics (April 2018)

## MAIN CARRIERS BY TOTAL SEAT CAPACITY



**RYANAIR** **AER LINGUS + REGIONAL** **NORWEGIAN AIR INT.**

**54%** **23%** **7%**

Source: L&RS estimate based on FlightRadar24 data and published schedules

## MAIN MARKETS IN & OUTBOUND

**Total EU (incl. UK)** **Britain** **US/Canada** **Spain**

**74%** **46%** **25%** **8.2%**

## TOP ROUTES BY PASSENGERS (ARRIVALS AND DEPARTURES)

**1 London (Heathrow) 271,203**  
**2 London (Stansted) 198,817**  
**3 New York (JFK) 130,662**  
**4 London (Gatwick) 116,781**  
**5 Boston (Logan) 94,144**



Source: CSO Aviation Statistics (April 2018)

## ECONOMIC IMPACT

**€3.8bn**

Source: Shannon Group Economic Impact Report (2017), Tables 4 and 11

## EMPLOYMENT

**13,695**

Total employment (**260** are directly employed)

Source: Shannon Group Economic Impact Report 2017, p. 8-10

## CONNECTIVITY

**30** Number of scheduled destinations served by **8** airlines

Source: Shannon Group Annual Report (2018), p.100-102. Note: Refers to summer / winter 2018 schedules.

# KNOCK AIRPORT (IRELAND WEST AIRPORT)

## PASSENGERS

Knock Airport's busiest year was in 2017, with **0.75m** passengers

**0.75m**

This represents a **+10.5%** increase since 2012. Knock Airport processes:

**2.2%** of all passengers at the main Irish airports

**100%** Short haul

Source: CSO Aviation Statistics (April 2018)

## MAIN CARRIERS BY TOTAL SEAT CAPACITY



**RYANAIR** **AER LINGUS** **Flybe**

**74%** **14%** **12%**

Source: L&RS estimate based on FlightRadar24 data, published 2017/2018 summer / winter flight schedules, average frequency, and the 2017 load factor for each airline

## MAIN MARKETS IN & OUTBOUND

**Total EU (incl. UK)** **Britain** **Portugal** **Spain**

**99.9%** **85%** **5%** **4.5%**

## TOP ROUTES BY PASSENGERS (ARRIVALS AND DEPARTURES)

**1 London (Stansted) 158,854**  
**2 London (Luton) 130,118**  
**3 Liverpool 85,416**  
**4 London (Gatwick) 78,329**  
**5 East Midlands 73,235**



Source: CSO Aviation Statistics (April 2018)

## ECONOMIC IMPACT

**€150m**

Source: Ireland West Airport Annual Review 2017 (2018)

## EMPLOYMENT

**1,400**

Total employment (**175** are directly employed)

Source: Ireland West Airport Annual Review 2017 (2018) Note: Figure for Total Employment is a L&RS estimate produced using published methodologies (available upon request)

## CONNECTIVITY

**15** Number of scheduled destinations served by **3** airlines

Source: Ireland West Airport (2018) press release

# KERRY AIRPORT

## PASSENGERS

Kerry Airport's busiest year was in 2008, with **0.43m** passengers

**0.34m**

This represents a **+17.1%** increase since 2012. Kerry Airport processes:

**1%** of all passengers at the main Irish airports

**100%** Short haul

Source: CSO Aviation Statistics (April 2018)

## MAIN CARRIERS BY TOTAL SEAT CAPACITY



**RYANAIR** **AER LINGUS REGIONAL**

**80%** **20%**

Source: L&RS estimate based on FlightRadar24 data, published 2017/2018 summer / winter flight schedules, average frequency, and the 2017 load factor for each airline

## MAIN MARKETS IN & OUTBOUND

**Total EU (incl. UK)** **Britain** **Germany** **Ireland (Domestic)**

**100%** **57%** **18%** **15.3%**

## TOP ROUTES BY PASSENGERS (ARRIVALS AND DEPARTURES)

**1 London (Luton) 111,713**  
**2 London (Stansted) 77,693**  
**3 Frankfurt 54,745**  
**4 Dublin 51,284**  
**5 Alicante 21,366**



Source: CSO Aviation Statistics (April 2018)

## ECONOMIC IMPACT

**€70m (EST.)**

Source: L&RS, based methodology applied to similar sized airports

## EMPLOYMENT

**640**

Total employment (**80** are directly employed)

Source: L&RS, based on a similar methodology applied to similar sized airports

## CONNECTIVITY

**7** Number of scheduled destinations served by **2** airlines

Source: Kerry Airport flight schedules and Flight Radar 24