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IRELAND'S MAIN AIRPORTS
AN ECONOMIC PROFILE (2017)

ALL MAIN AIRPORTS

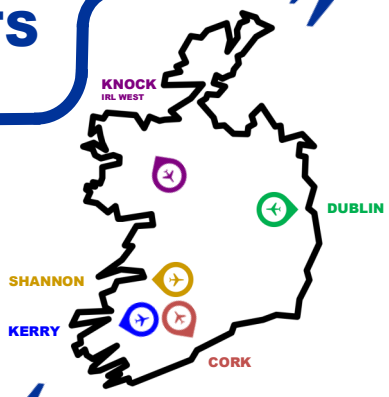
PASSENGERS (TOTAL)

34.7m

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

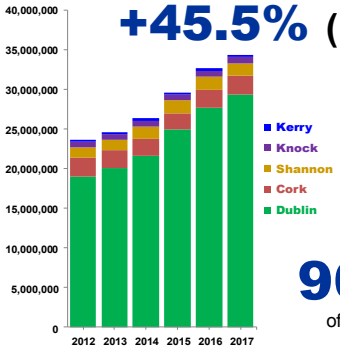
85.5% In percentage terms...

6.7%
4.6%
2.2%
1%



PASSENGERS CHANGE SINCE 2012

+45.5% (10.8m)



96.2% of this growth was at Dublin Airport

ECONOMIC IMPACT

€10.2bn

5.1% of Ireland's GNI*
3.5% 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



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

PASSENGERS

29.4m

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

85.3% of all passengers at the main Irish airports

85% Short haul
15% Long haul

MAIN CARRIERS BY TOTAL SEAT CAPACITY*

RYANAIR **43%**
AER LINGUS **37%**
BRITISH AIRWAYS **3%**

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

MAIN MARKETS IN & OUTBOUND

Total EU (Incl. UK)	Britain	US/Canada	Spain
82%	34%	11%	7%

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

19th 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



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

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

MAIN CARRIERS BY TOTAL SEAT CAPACITY

AER LINGUS **43%**
RYANAIR **39%**
AER LINGUS REGIONAL **13%**

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

Total EU (Incl. UK)	Britain	Spain	Netherlands
98%	57%	11%	7.2%

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

July 2018

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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

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)

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.

EMPLOYMENT

13,695
Total employment (**260** are directly employed)

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

ECONOMIC IMPACT

€983m

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

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%** decrease since 2012. Knock Airport processes:

2.2%

of all passengers at the main Irish airports

100% Short haul

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)

CONNECTIVITY

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

Source: Ireland West Airport (2018) press release

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)

ECONOMIC IMPACT

€150m

Source: Ireland West Airport Annual Review 2017 (2018)

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

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)

CONNECTIVITY

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

Source: Kerry Airport flight schedules and Flight Radar 24

EMPLOYMENT

640
Total employment (**80** are directly employed)

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

ECONOMIC IMPACT

€70m (EST.)

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

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