An Roinn Iompair
Department of Transport

Covid-19 Impact
One Year On

Strategic Research and Analysis Division
14th May 2021

Key Dates / Measures

- **29-Feb** – First Covid-19 case confirmed in Ireland.
- **14-Mar –** US travel ban on flights from Schengen zone in effect (UK, Ireland exempted until 17-Mar).
- **17-Mar** – EU-wide 30-day entry ban for non-EU citizens.
- **27-Mar** – 2km travel restrictions introduced
- **30-Mar –** Revised public transport timetables begin to come in to effect
- **15-May –** Phased Roadmap begins
- **15-Sept –** Government Living with Covid-19 plan introduced, all counties at Level 2
- **07-Oct –** All counties moved to Level 3
- **22-Oct –** Whole country placed on Level 5 for 6 weeks
- **01-Dec –** All counties move to Level 3
- **04-Dec –** Restaurants and 'dry pubs' reopen
- **19-Dec –** London placed under tier 4 restrictions, travel outside of London is prohibited
- **24-Dec –** Restrictions around gatherings increase, pubs and restaurants close
- **01-Jan –** Whole country placed on Level 5
- **06-Jan –** Schools and Childcare to remain closed following Christmas break
- **04-Feb –** New and increased fines introduced for no-essential travel
- **11-Feb –** Mandatory quarantine list of 20 countries, non-essential travel fine increased to €2,000
- **23-Feb** – Level 5 restrictions extended to April
- **01-Mar** – Schools begin phased reopening
- **26-Mar** – Mandatory hotel quarantine introduced for persons arriving from designated States
- **08-Apr** – 1 millionth dose of vaccination administered in Ireland
- **12-Apr** – Restrictions reduced - travel within own county permitted, all children to return to school, some construction work restarts
- **19-Apr** – Restrictions reduced - high performance athletes resume training
- **26-Apr** – Restrictions reduced - outdoor sports facilities and visitor attractions reopen
- **04-May -** Restrictions reduced - all construction resumes
- **10-May** – Restrictions reduced - intercounty travel, garden visits, outdoor training, personal services, click-and-collect permitted, public transport to run at 50% capacity
- **17-May** – Restrictions reduced - all retail permitted to open

Vaccinations

(up to 11/05/21)

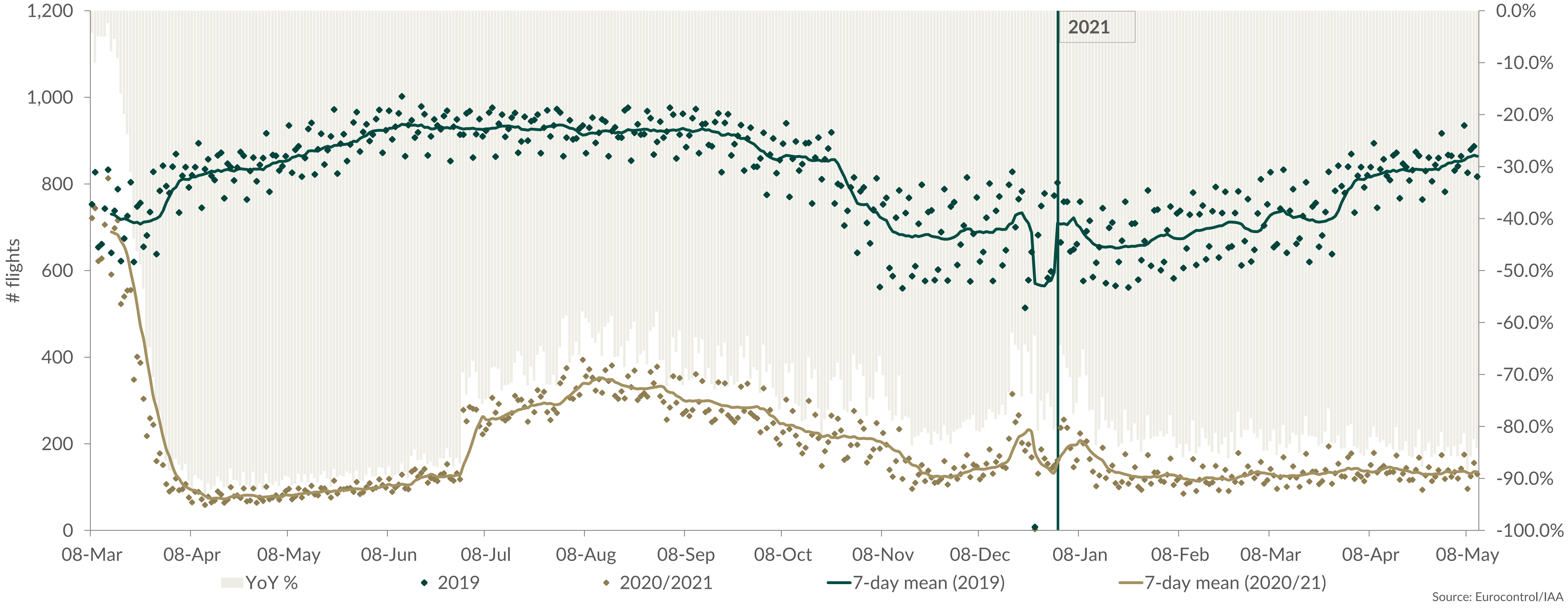
1,408,105 people have received 1st dose

514,808 people have received their 2nd dose

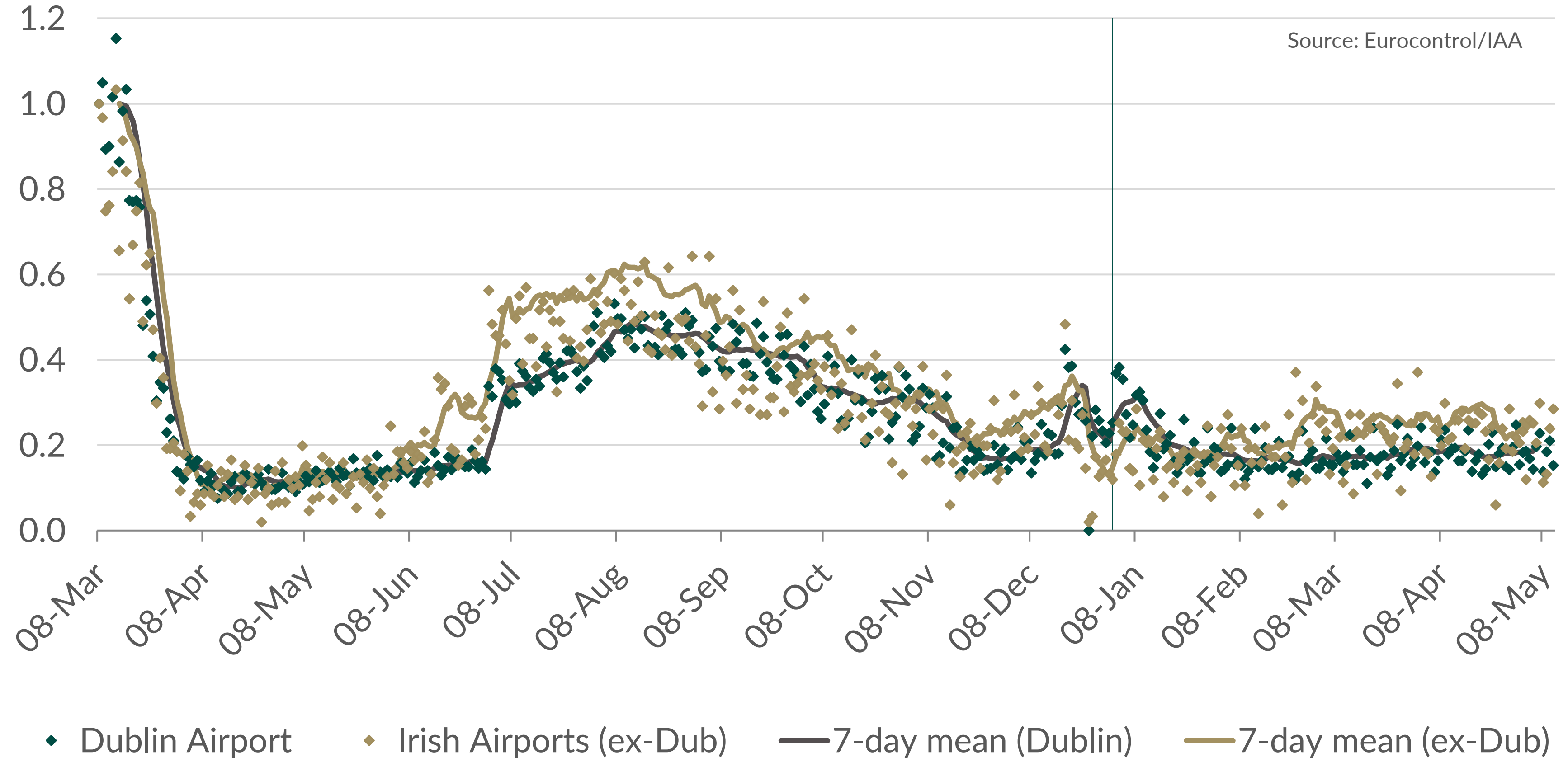
1,922,913 doses administered

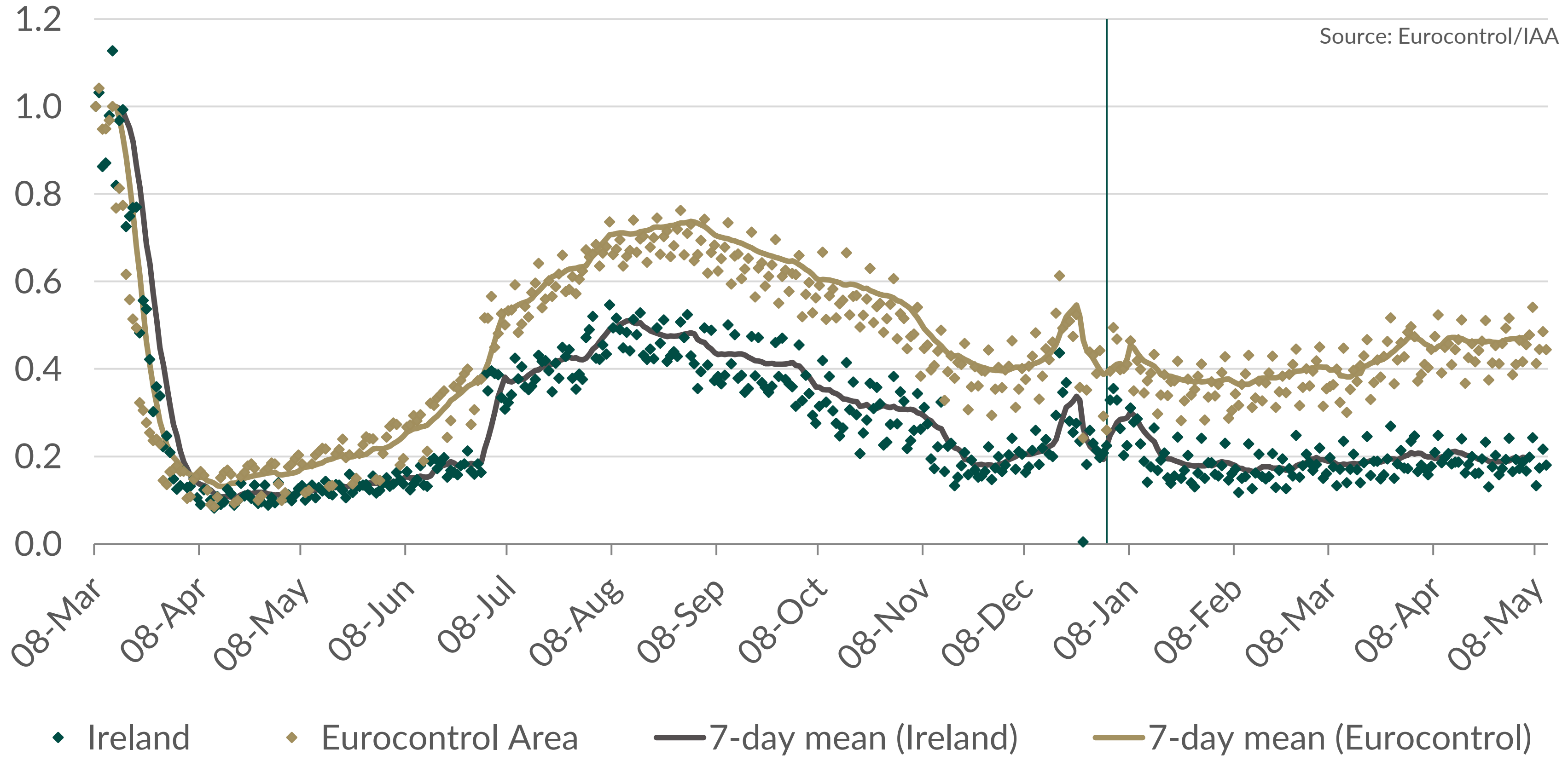
Aviation

Covid-19 Impact on D/Transport Sectors



Flights to/from Irish airports Source: Eurocontrol/IAA			
Month	2019	2020	YoY %
March (from 8th)	17,546	11,168	-36.4%
April	24,830	2,444	-90.2%
May	27,341	2,757	-89.9%
June	27,910	3,497	-87.5%
July	28,892	8,624	-70.2%
August	28,495	10,468	-63.3%
September	27,332	8,721	-68.1%
October	25,863	7,069	-72.7%
November	20,838	4,700	-77.4%
December	20,732	5,062	-75.6%
Month	2019	2021	YoY %
January	20,860	4,751	-77.2%
February	19,376	3,402	-82.4%
March	22,646	4,062	-82.1%
April	24,962	4,143	-83.4%
May (to 11th)	9,394	1,462	-84.4%
Total	364,047	85,199	-76.6%
# days tracked:		449	
Estimated flights 'lost' to Covid-19:		278,848	
Daily Flight Stats	2019	2020	2021
max	1,002	813	256
min	514	59	85
mean	835	216	136





Estimated 264,687 flights, to/from Irish airports, 'lost' to Covid-19 to date (11/05/2021).

Restrictions introduced by Government in order to tackle the spread of the COVID-19 virus have had significant impact on international travel. Year-on-year comparison of daily flights deficit stands at approximately 83% below volumes seen in April 2019 as restrictions around flying continue, this is the highest deficit seen since June 2020.

Covid-19 Impact on D/Transport Sectors

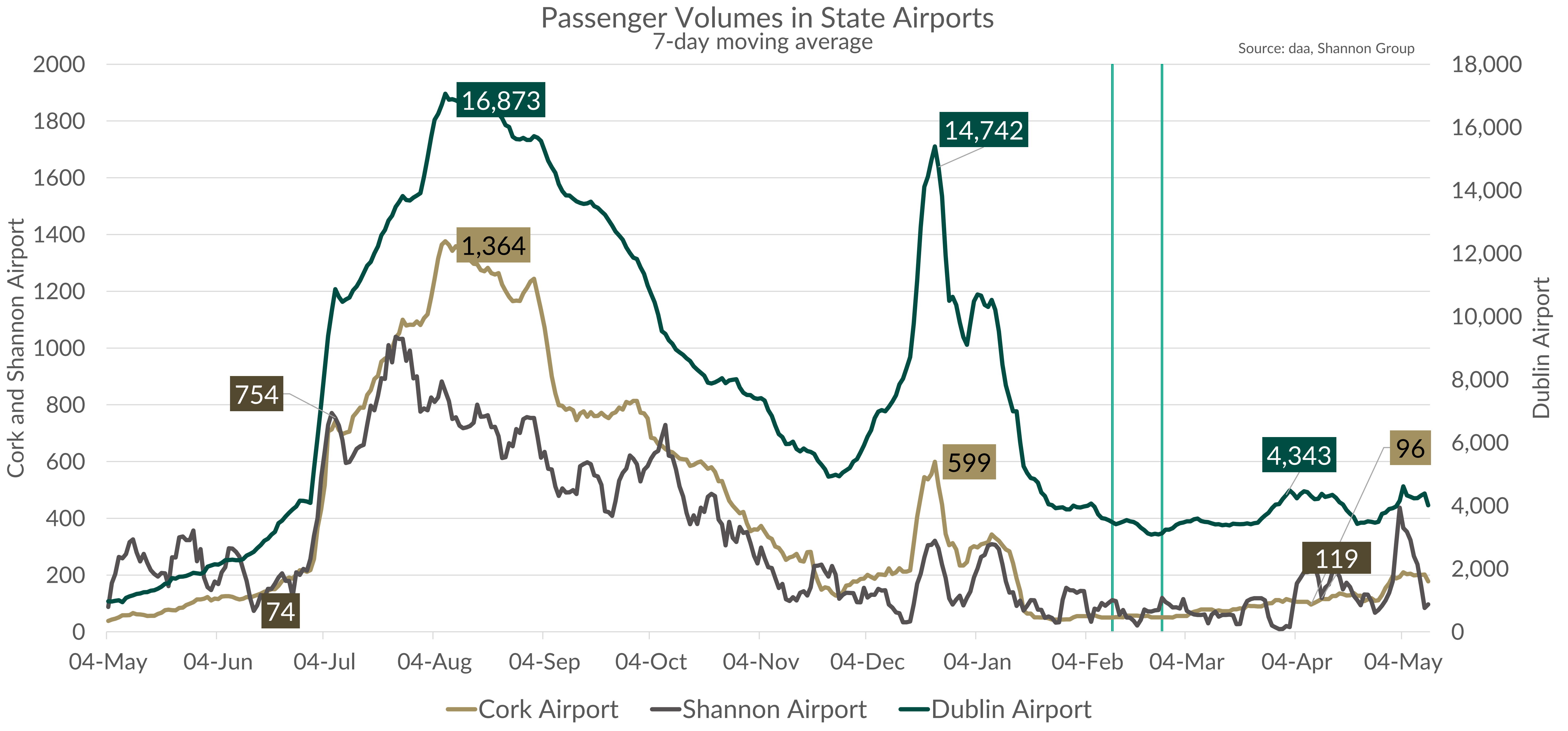
Weekly Passenger levels across Dublin, Cork, and Shannon airports fell by more than 90% below 2019 figures during initial stages of restrictions in Ireland. The introduction of more restrictions around air travel, fines, and mandatory quarantine led to a further fall in the number of air passengers in state airports, resulting in passenger volumes over 95% below 2019 figures.

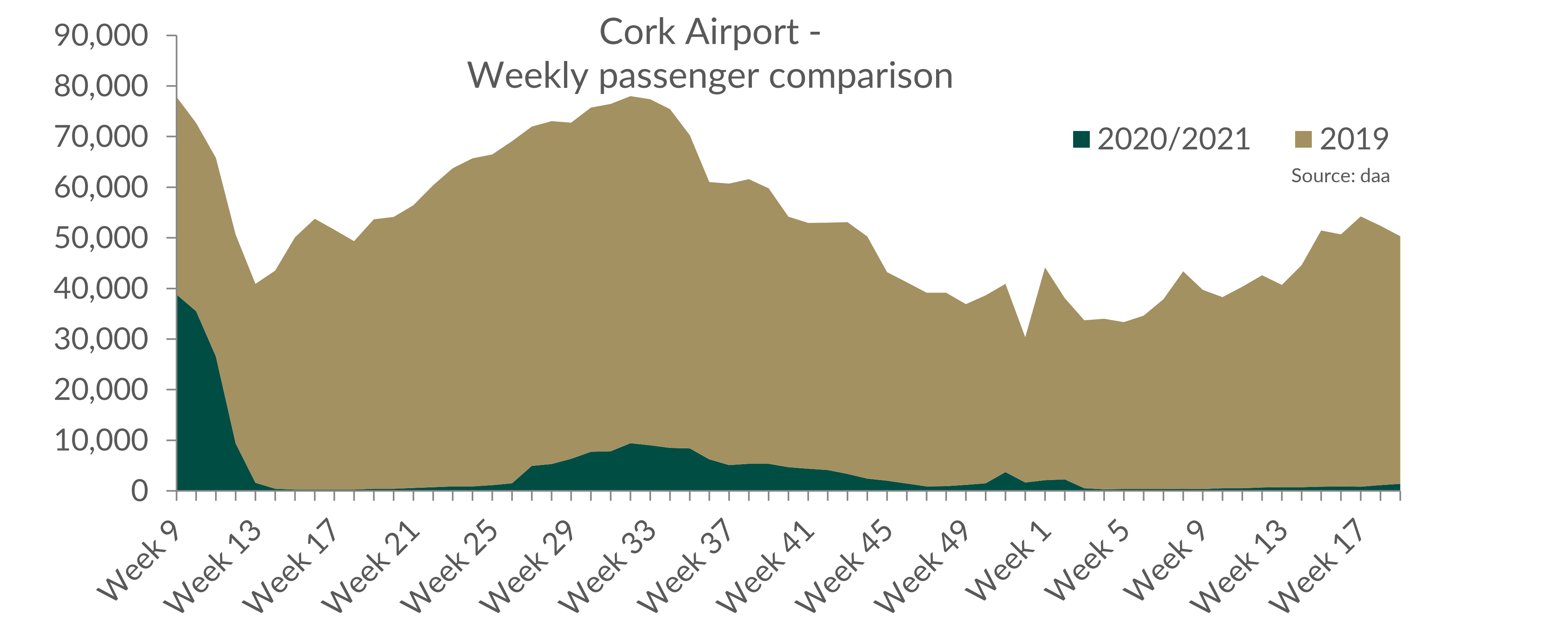
Note: DAA (Cork and Dublin) annual comparison based on week number ie. Week 1 day 3, 2021 (or 2020) vs Week 1 day 3, 2019, Shannon data compares dates - i.e., 6th Mar 2021 (or 2020) vs 6th Mar 2019.

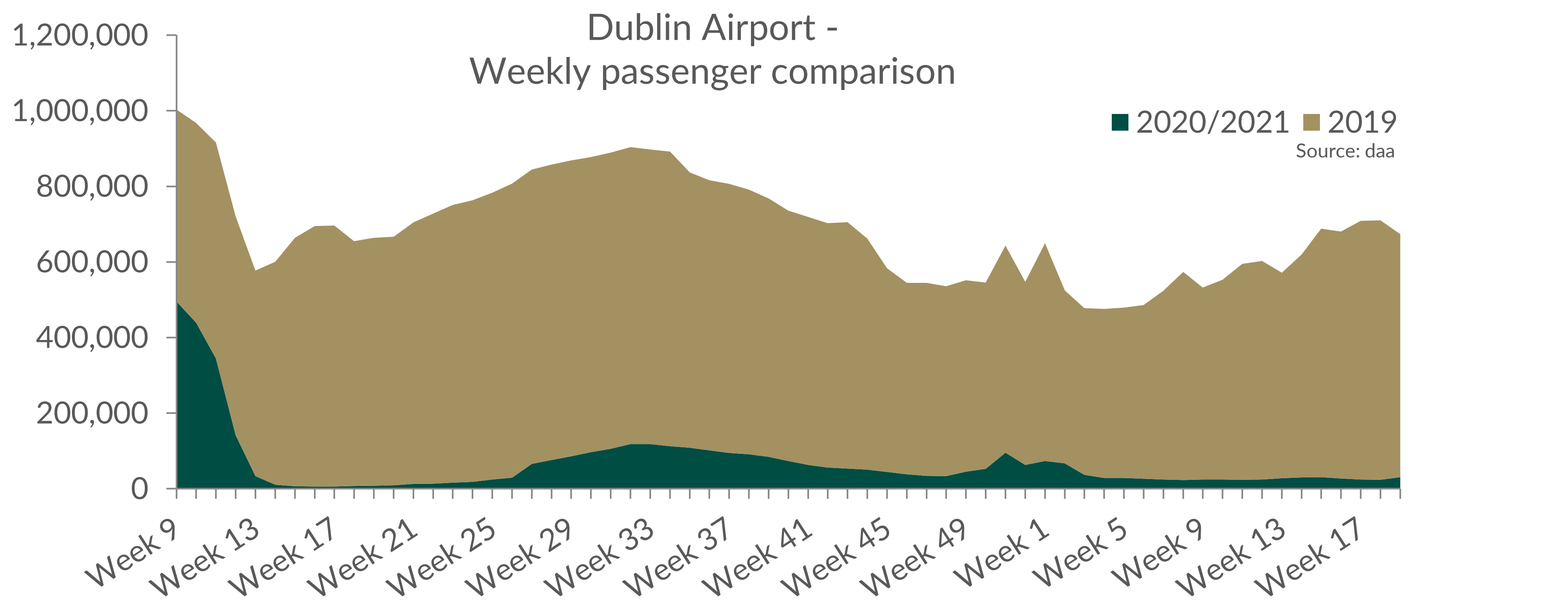
YoY% Flight Passenger Volumes

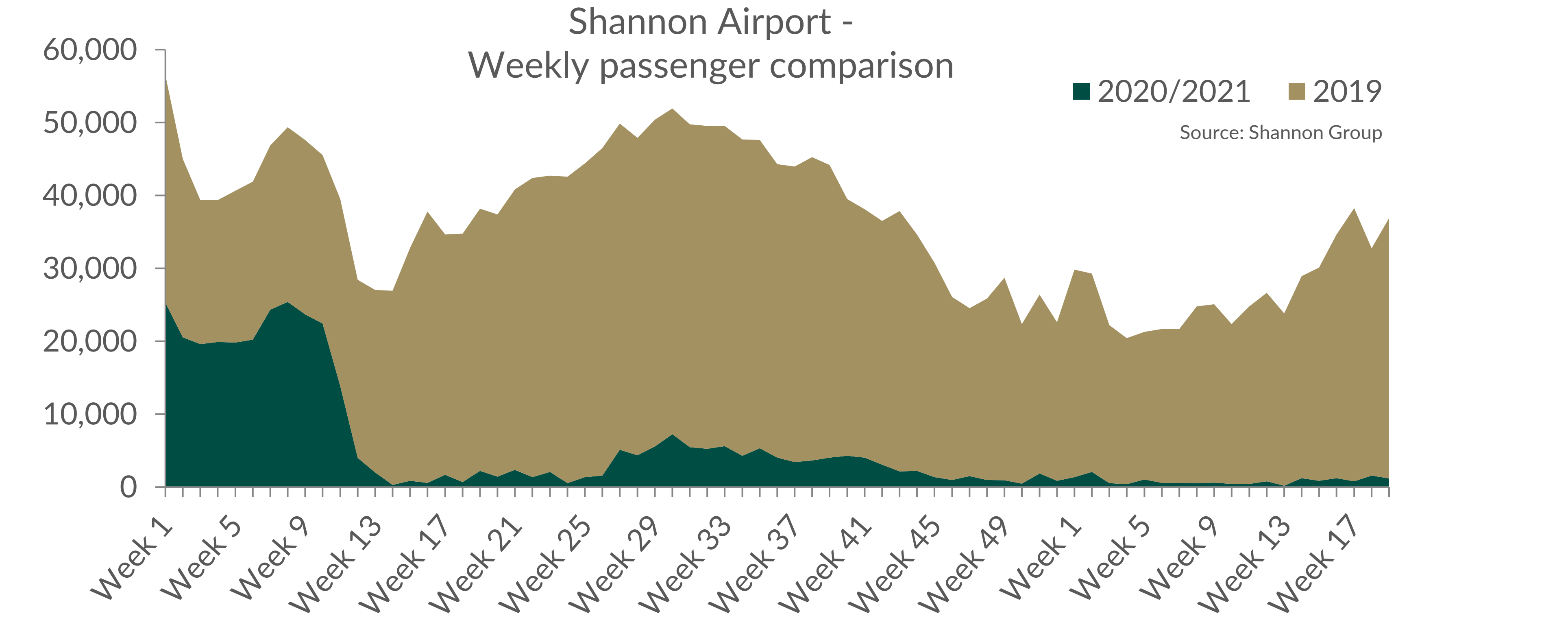
Source: daa, Shannon Group

Month	Dublin	Cork	Shannon
May 2020	-98%	-99%	-95%
June	-97%	-98%	-97%
July	-89%	-91%	-87%
August	-85%	-86%	-88%
September	-87%	-90%	-91%
October	-91%	-92%	-90%
November	-92%	-96%	-95%
December	-92%	-97%	-95%
January 2021	-91%	-97%	-95%
February	-95%	-99%	-97%
March	-96%	-99%	-98%
April	-96%	-98%	-97%
May (to 11th)	-96%	-97%	-96%









Land Travel

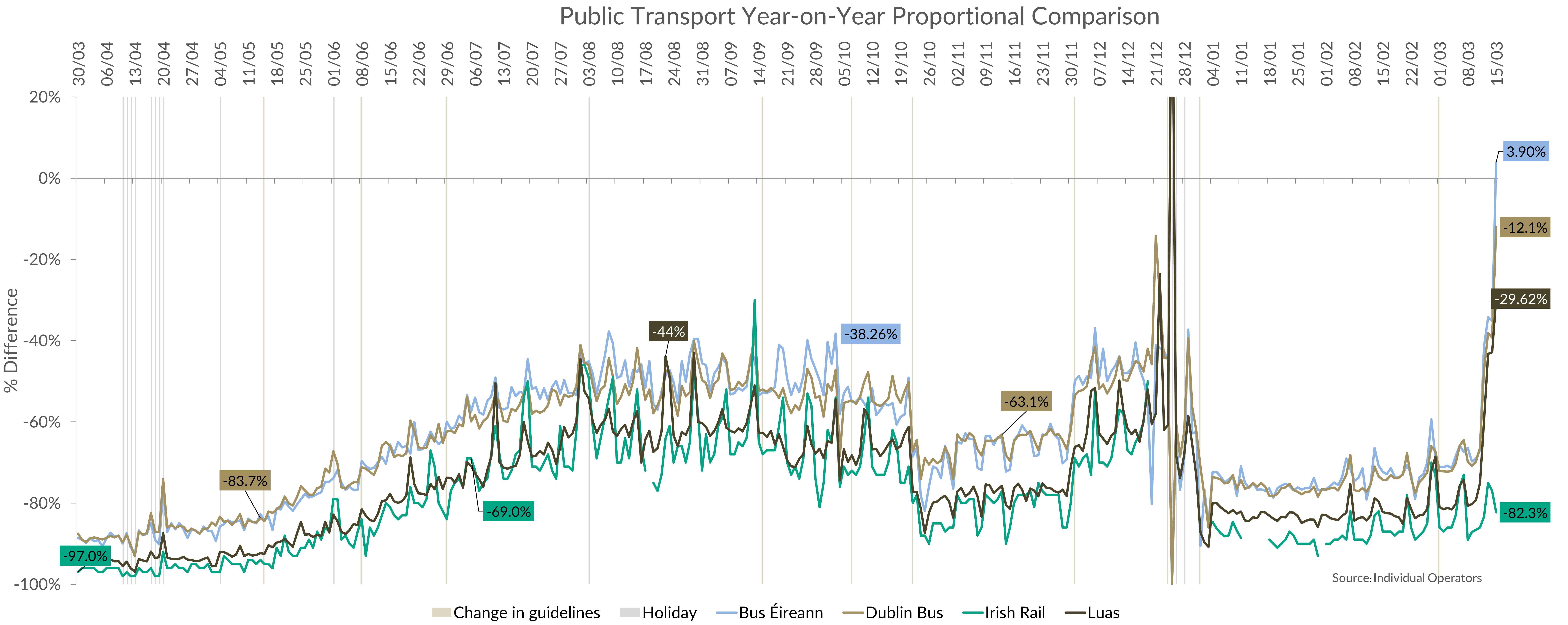
Covid-19 Impact on D/Transport Sectors

Public Transport usage fell significantly at the beginning of the pandemic as a result of reduced occupancy, and closures of offices, businesses, schools, et cetera. By the end of March 2020 passenger numbers across bus, luas, and rail were at least 90% below 2019 figures. As restrictions eased public transport passenger levels increased, peaking at approximately 30% below 2019 volumes in September, before falling again as restrictions tightened once again before Christmas.

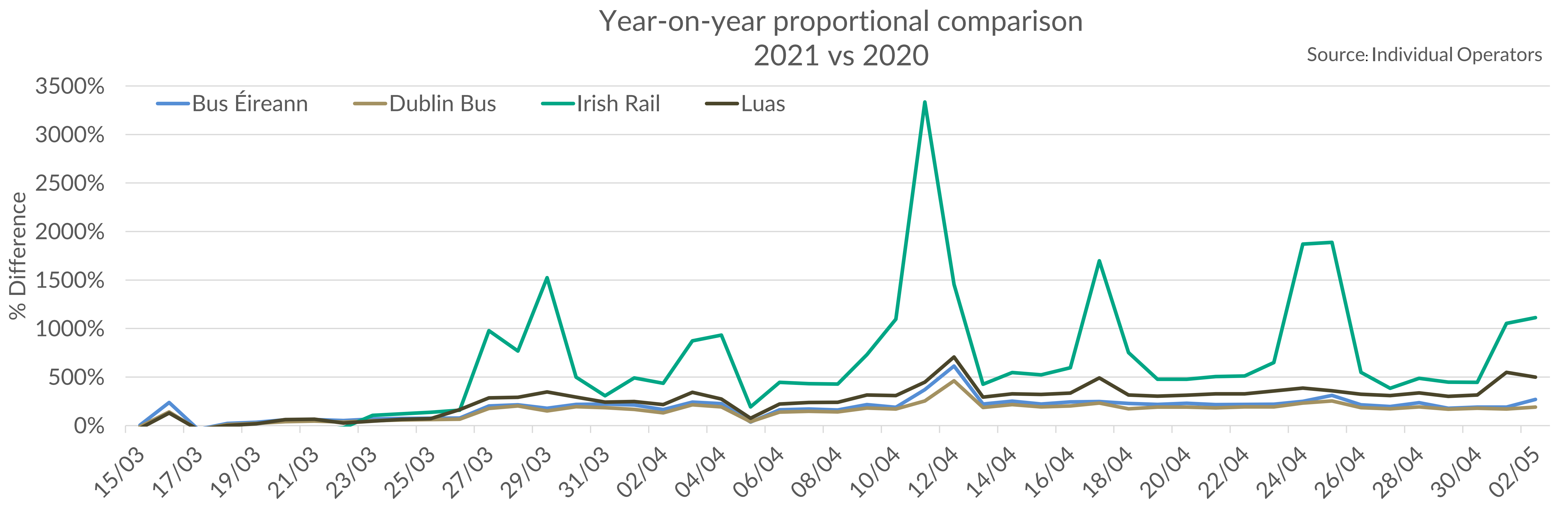
It is important to note that the Christmas period is different to other holidays throughout the year, as such it is difficult to draw year-on-year comparisons. Most transport services are empty on Christmas Day, an increase of one passenger would have a much larger impact than on any other day in the year.

As of the 23rd March 2021, the YoY comparison has shown positive increases continuously across the 4 transport operators, compared to 2020. It is important to note when figures are so small, 1 additional passenger versus the year before will have a significant effect on the YoY% comparison.

Data presented shows the volume of daily passengers as a percentage of the volume seen one year previous, across four public transport operators. Holiday days and changes in government guidelines are also shown. Data collected since March 30th 2020, due to technical issues data missing from some dates. Note data comparison based on day rather than date.



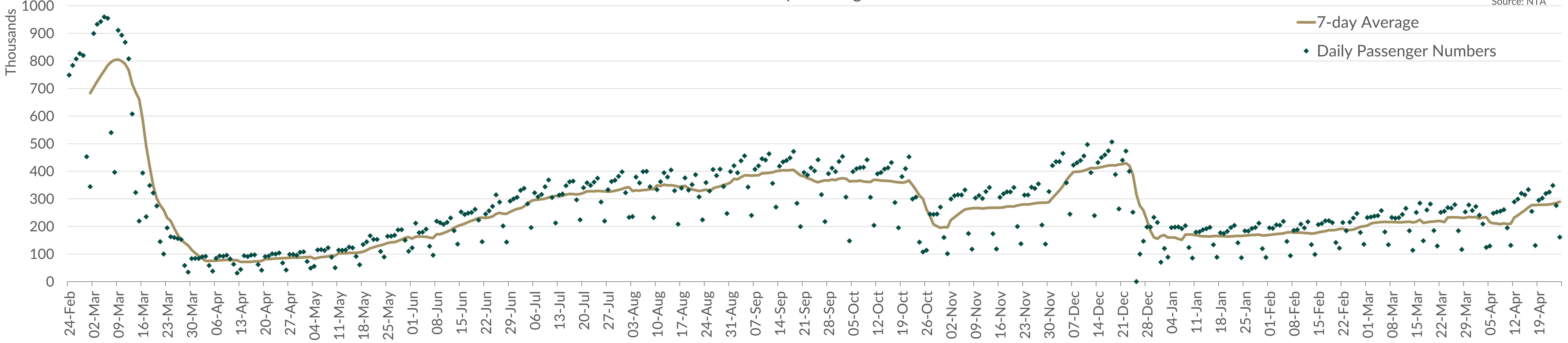
Public Transport Summary Statistics (30/Mar/2020-15/03/2021) Source: Individual Operators				
	Bus Éireann	Dublin Bus	Irish Rail	Luas
Mean deficit	-64.7%	-65.1%	-78.8%	-74.7%
Median deficit	-65.7%	-64.8%	-80.0%	-76.6%
Largest deficit (excl 25/12/20)	-92.5%	-93.1%	-98.0%	-96.9%
Smallest deficit	3.9%	-12.1%	-30.0%	-29.6%



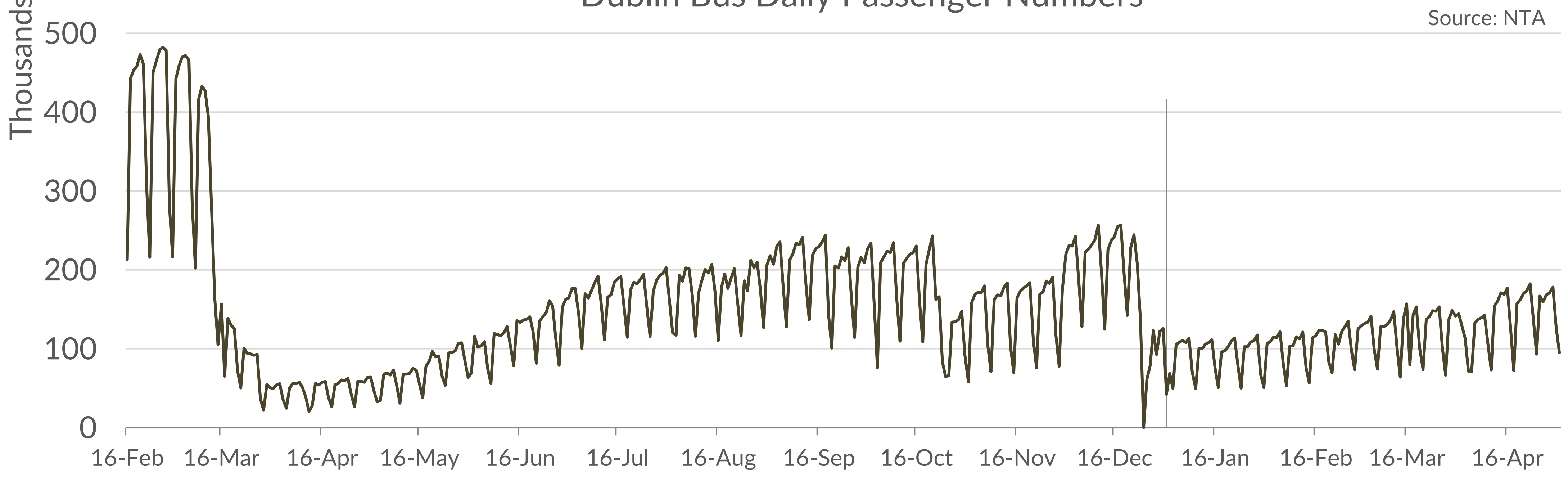
Land Travel

Covid-19 Impact on D/Transport Sectors

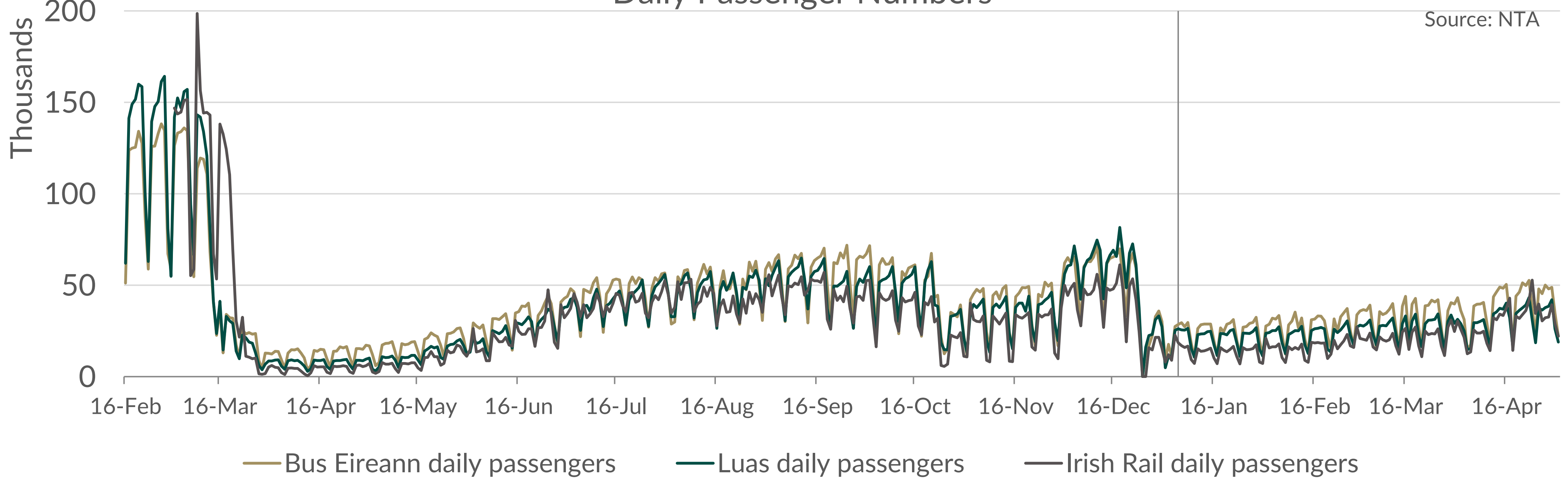
Overall PSO Daily Passengers 2020



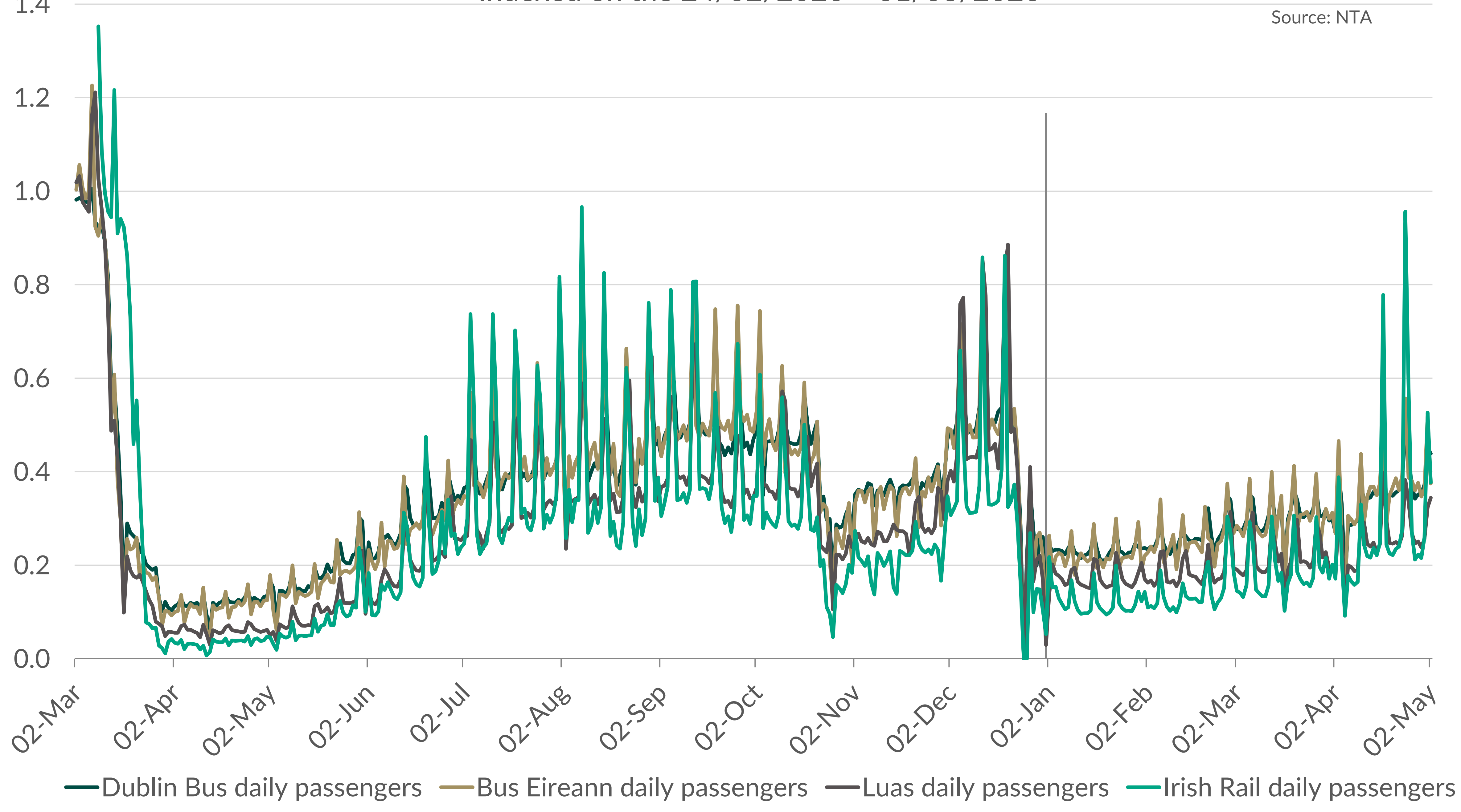
Dublin Bus Daily Passenger Numbers



Daily Passenger Numbers

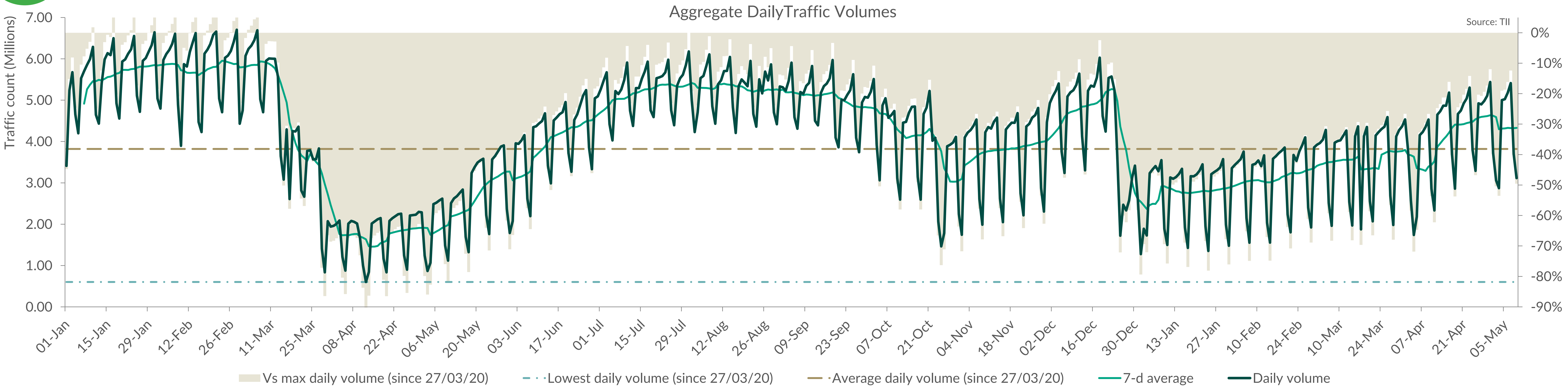


Daily Passenger Index
Indexed on the 24/02/2020 – 01/03/2020



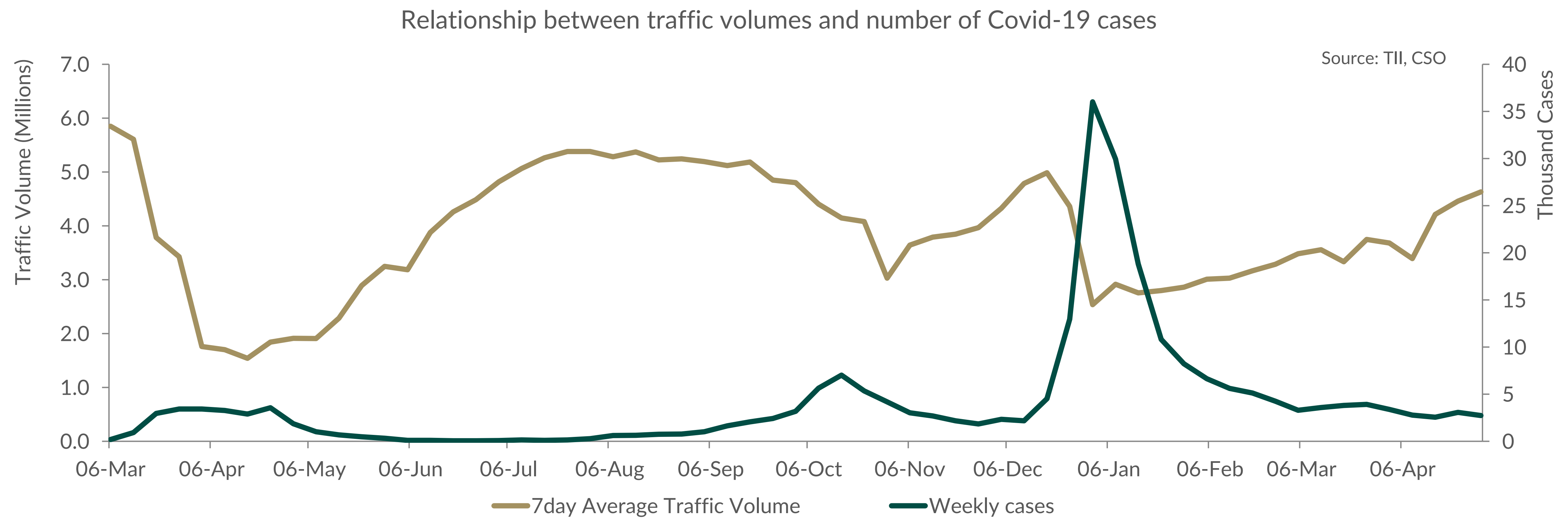
Land Travel

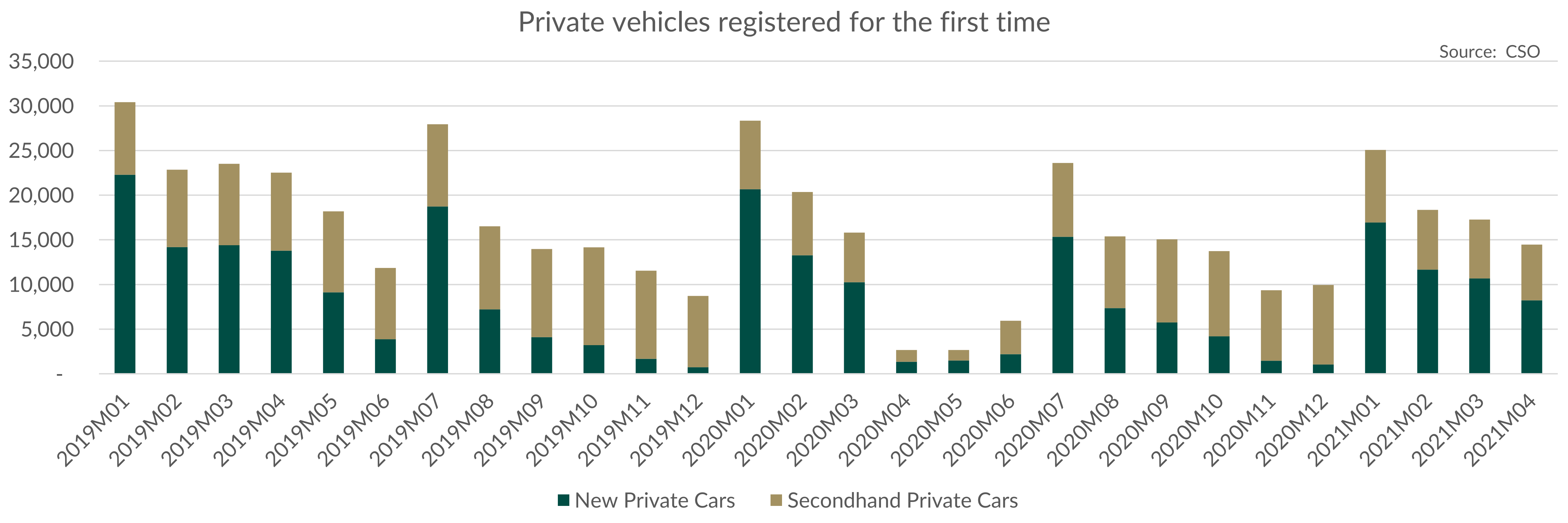
Covid-19 Impact on D/Transport Sectors



The restrictions implemented by Government in order to tackle the spread of the COVID-19 virus have had significant impact on national road traffic volumes over the last year. A plot of aggregate daily traffic volumes on 200+ traffic counters since January 1st 2020 demonstrates the scale of the reduction, as well as the recovery. Daily traffic volumes fell to a low of 602,933 vehicles in early April 2020, steadily rising to 6.18 million at the end of July 2020. Since March 27th 2020, when restrictions were first introduced, the average daily traffic volume recorded, to date, was 3.82 million vehicles, of which 2.9 million are private cars.

At the end of 2020, registration of new and second-hand private cars, was 27% lower than volumes seen in 2019. Electric cars accounted for 4.7% of all new cars registered in 2020, versus 3% in 2019. At the end of April, 6.4% of all new registered private vehicles were electric. Petrol/Diesel and electric, and petrol/diesel plug-in hybrids accounted for one quarter of all new private cars registered in 2021.





Covid-19 Impact on D/Transport Sectors

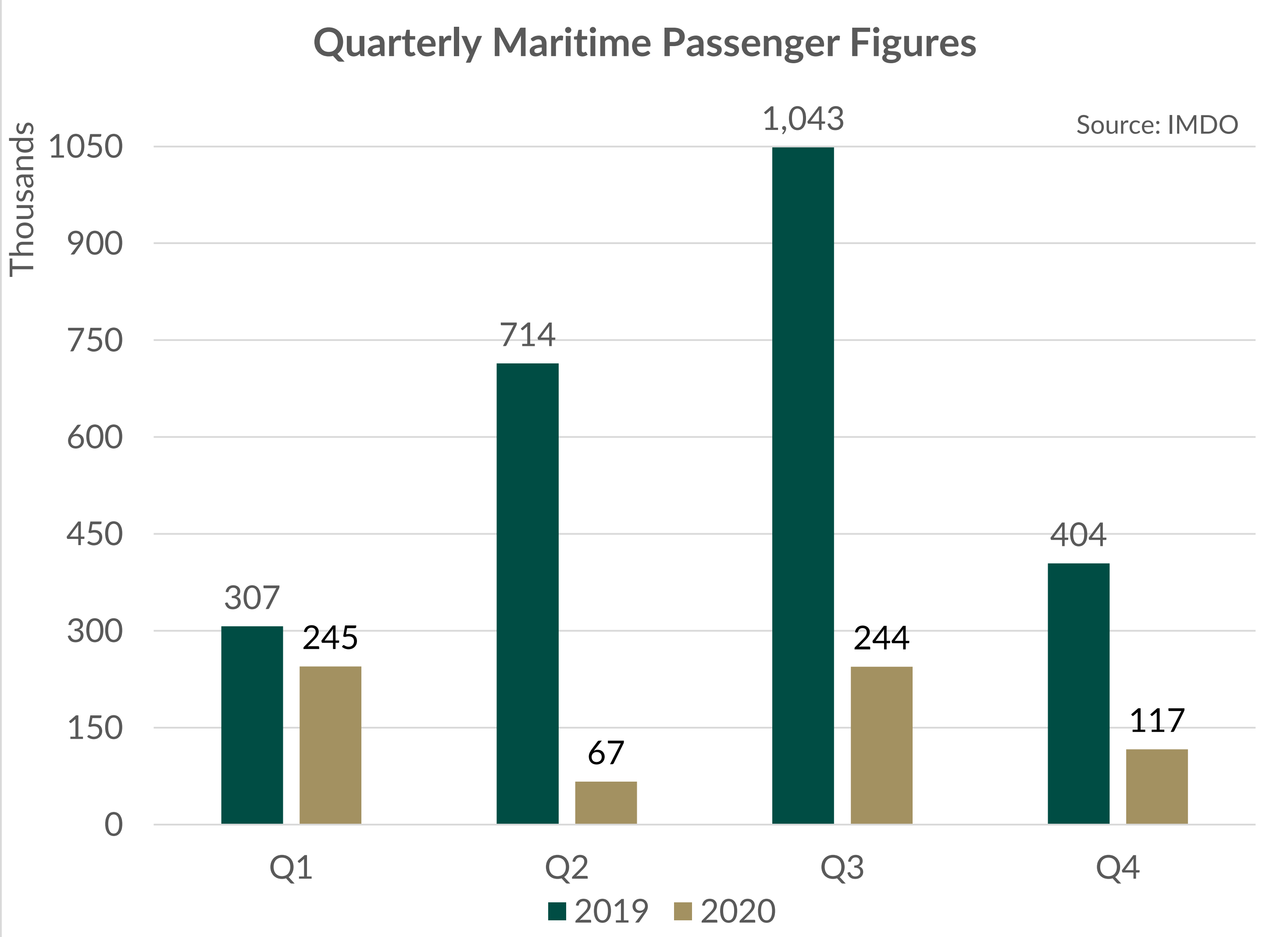
Maritime trade in 2020 was almost a year of two halves with significant impacts seen in the first half of the year and recovery evident in the second half of the year due to a combination of easing of COVID restrictions allowing an 'opening up' of some activity in retail and construction and other business areas and a level of pre Brexit stockpiling evident in Q4. At the height of COVID 19, overall maritime freight volumes through Irish ports fell by approximately 25% in April 2020 when compared to 2019.

Annual comparisons of Ro-Ro units show that in the first quarter of 2020 volumes fell by 5% compared to the same period in 2019, as COVID-19 restrictions increased through Q2 of 2020 year the year-on-year deficit was 16%. However Q3 saw growth in Ro-Ro units of 4% when compared with Q3 2019 and further growth of 15% in Q4 2020 when compared with Q4 2019.

Elsewhere, the Lo-Lo freight market was also negatively impacted by the onset of the pandemic. Total Lo-Lo volumes through Irish ports were reduced by 2% in Q1 2020, being impacted further in Q2, declining by 9% compared to Q2 2019. For Laden Lo-Lo volumes, Q1 saw a decline of 2%, being substantially worse affected in Q2, falling by 11%. Again improvements in this sector were visible in Q3 2020 with 2% growth and growth of 7% in Q 4 2020 in comparison to the same periods in 2019.

The Bulk markets (Break, Dry, and Liquid) were heavily impacted by the COVID-19 pandemic. Combining all 3 categories, bulk cargo through Irish ports fell by 6% in Q1 and 10% in Q2, 3% in Q3 and 1% in Q4 2020.

Break bulk volumes were down by 22% in Q1, 26% in Q2, up by 2% in Q3 and up by 8% in Q4 of 2020 when compared to the same periods in 2019. Dry bulk tonnage was also down by 10% in Q1 and declined by 8% in Q2 when compared to Q2 2019. Q3 increased by 9% and Q4 increased by 8%.



The Liquid bulk market was the most significantly impacted segment of Bulk freight. In Q1 2020, liquid bulk volumes saw an increase of approximately 3% compared to Q1 2019. In stark contrast to this, Irish ports recorded a decline of 10% in liquid bulk tonnage as the pandemic took hold of the economy in Q2 and a drop of 17% in Q3 and 13% in Q 4 when compared to the same periods in 2019. Liquid fuels volumes for road transport fell by roughly 60% for April and May due to the restrictions on domestic travel. Aviation fuels were similarly affected and remains so as COVID restrictions means many planes are grounded. However, kerosene imports remained strong for home heating, marginally negating the downturn in road and aviation fuels.

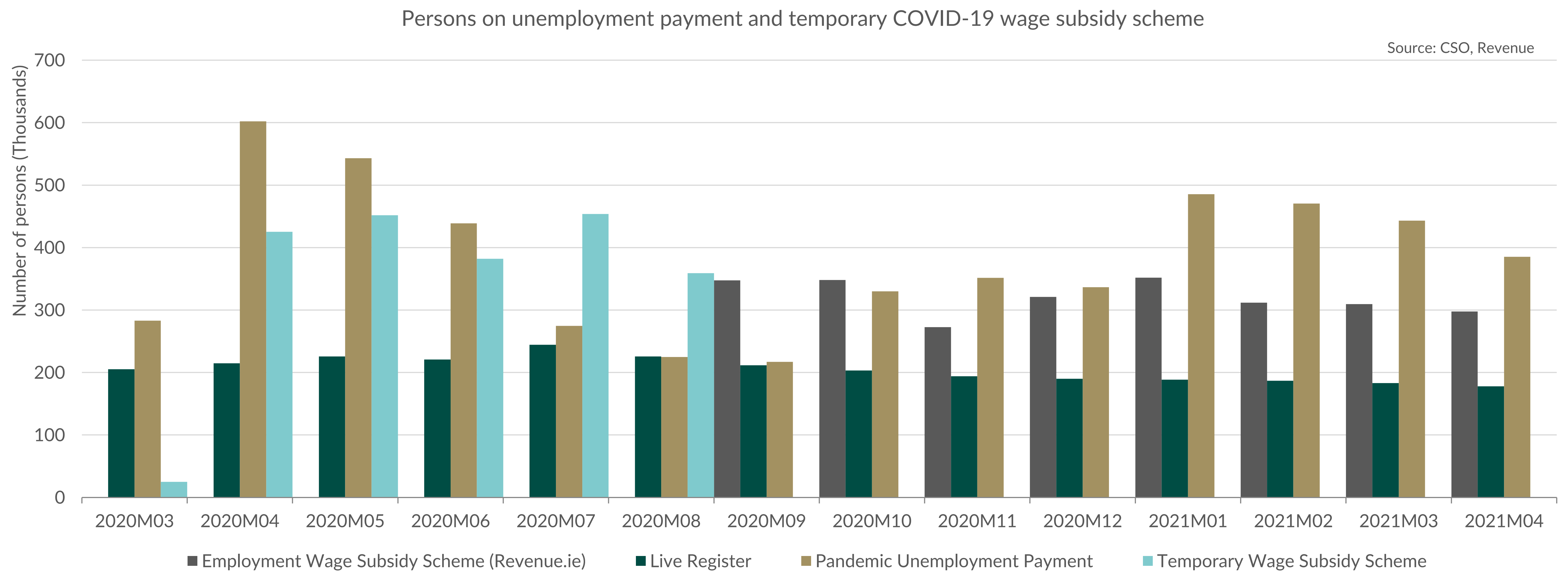
Finally, the maritime passenger market was the most significantly impacted segment of the entire maritime trade industry. Passenger numbers were down by 20% in Q1 2020 when compared to the same period in 2019. This increased to an overall decline of 90% in Q2 as COVID-19 restrictions were imposed by the Government to curtail the spread of the virus. In early April, the decline in passenger travel had reached heights of -96% compared to a 2019 weekly benchmark. Passenger numbers remained deflated with numbers in Q3 2020 showing as 77% below 2019 and Q4 2020 being 71% below 2019 figures.

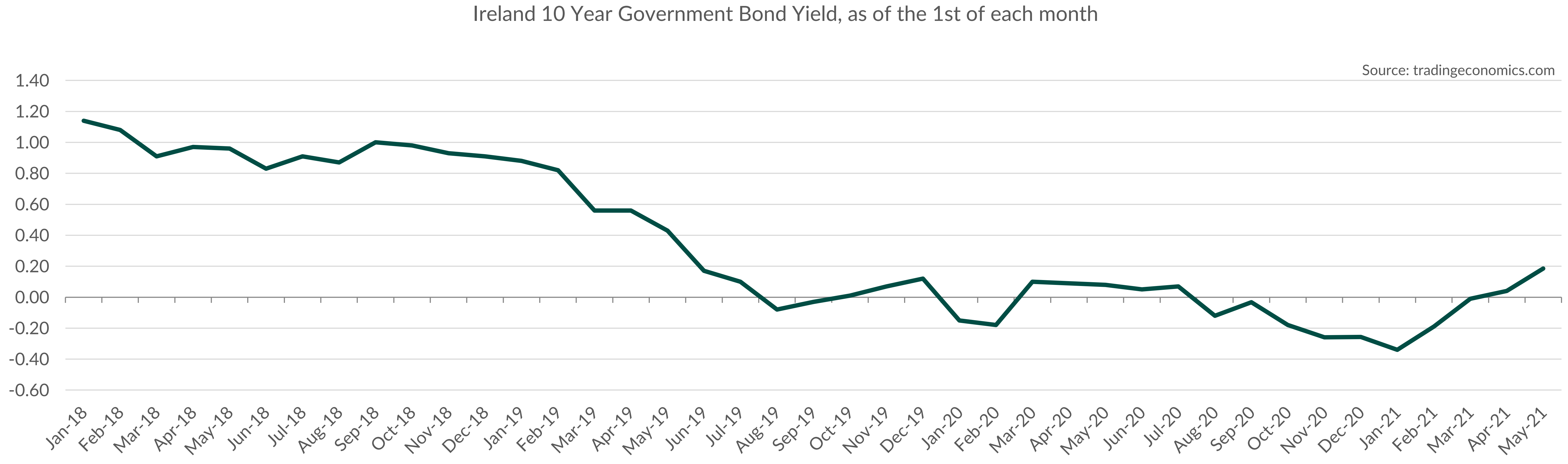
Source: Irish Maritime Development Office

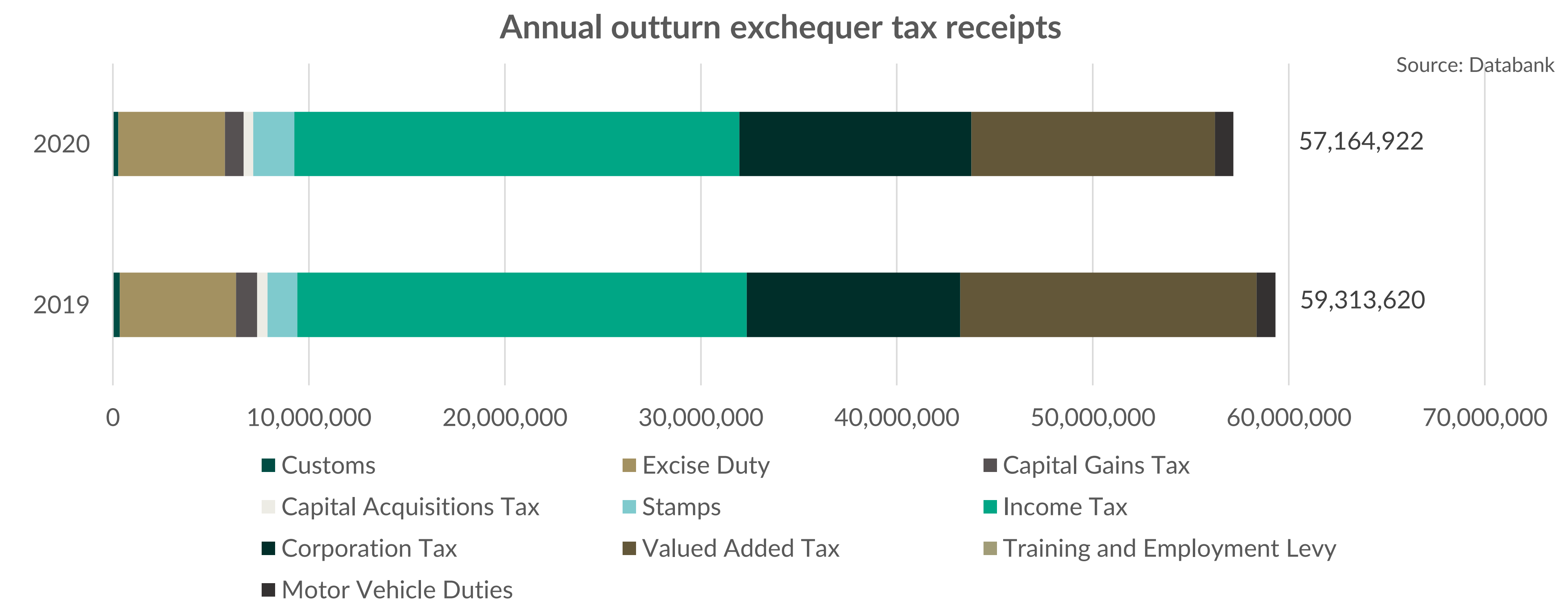
Represents values from across Ports in the Republic of Ireland (excl. Northern Irish Port data)

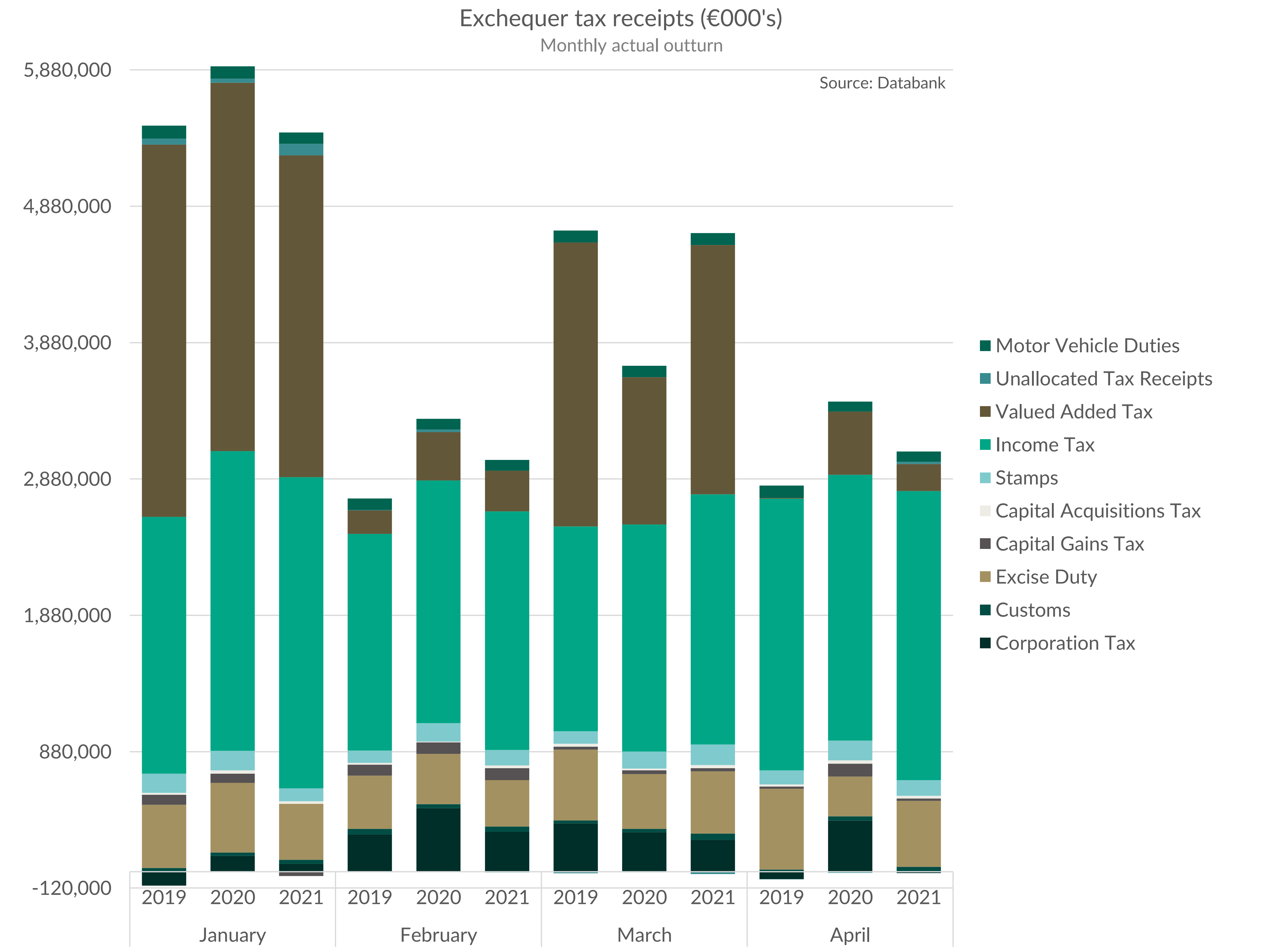
Covid-19 Impact on D/Transport Sectors

The data presented here are key economic indicators which relate to the transport sector and to the economic well being of the country.

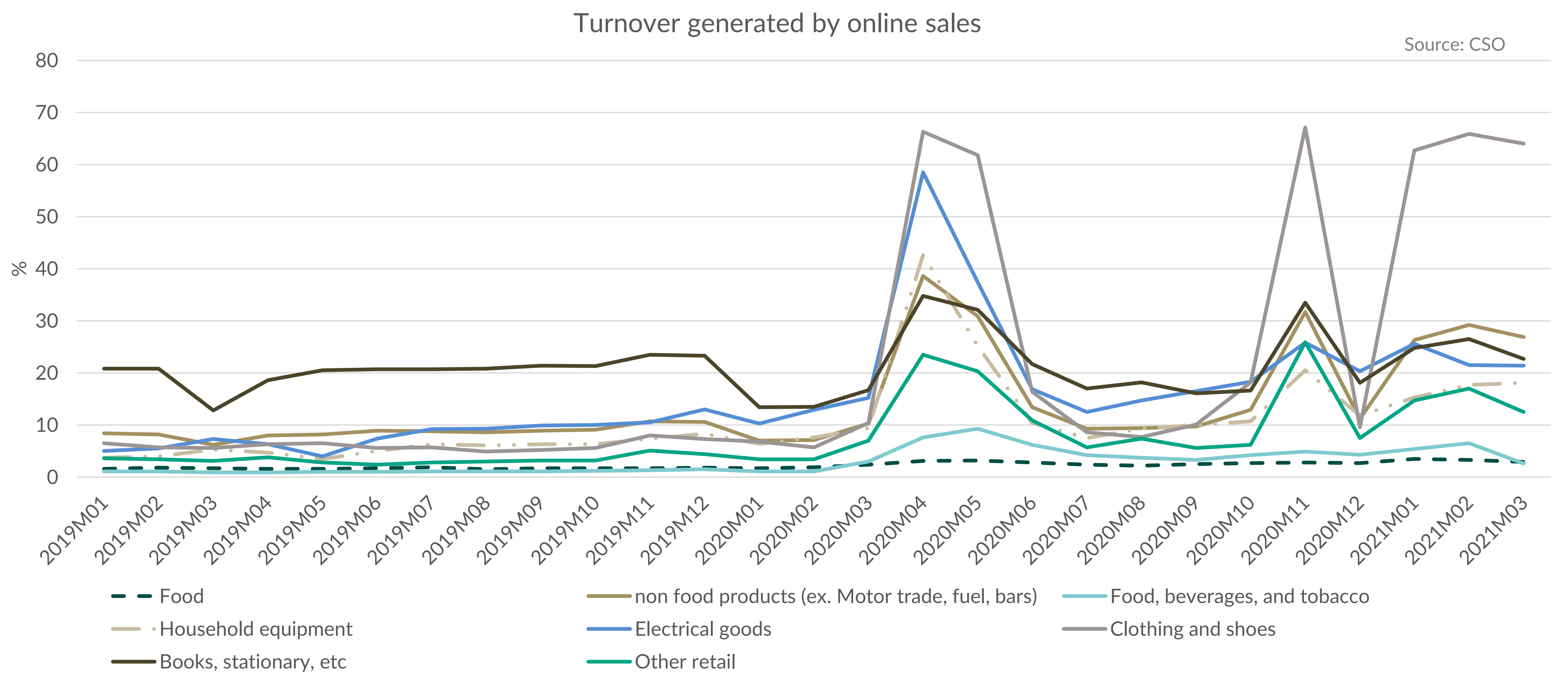


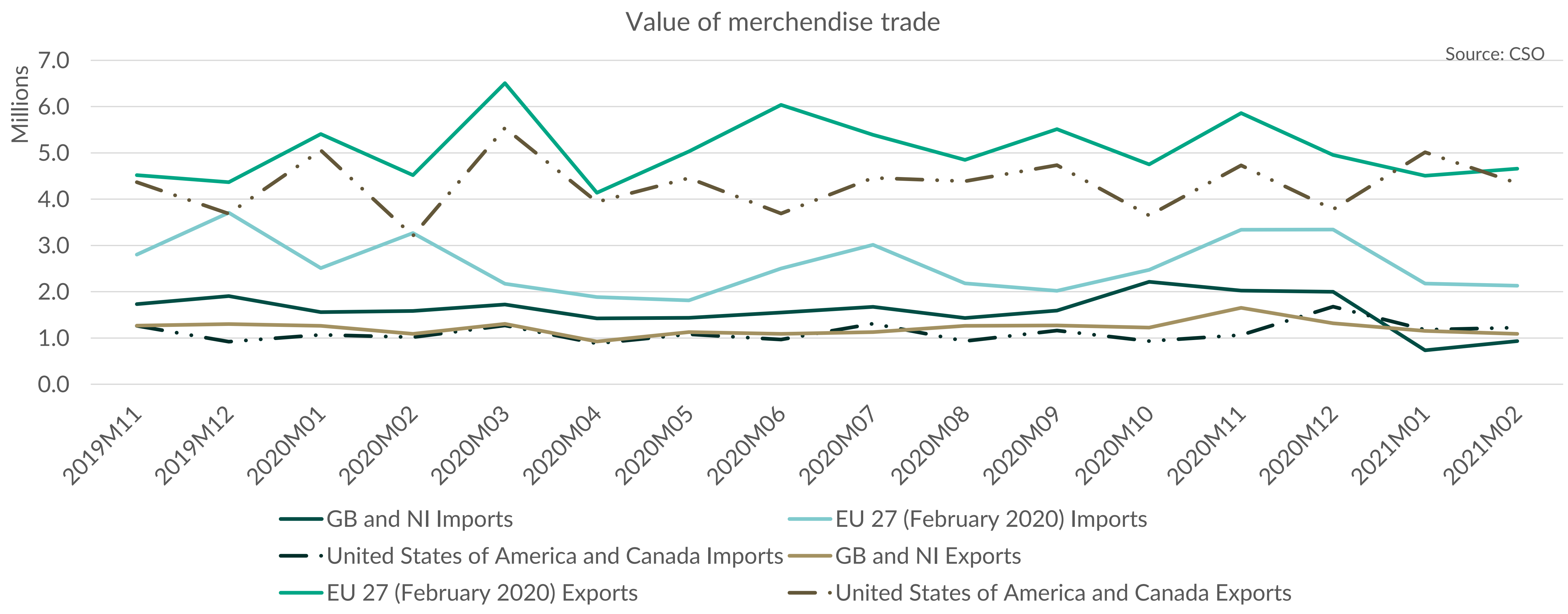


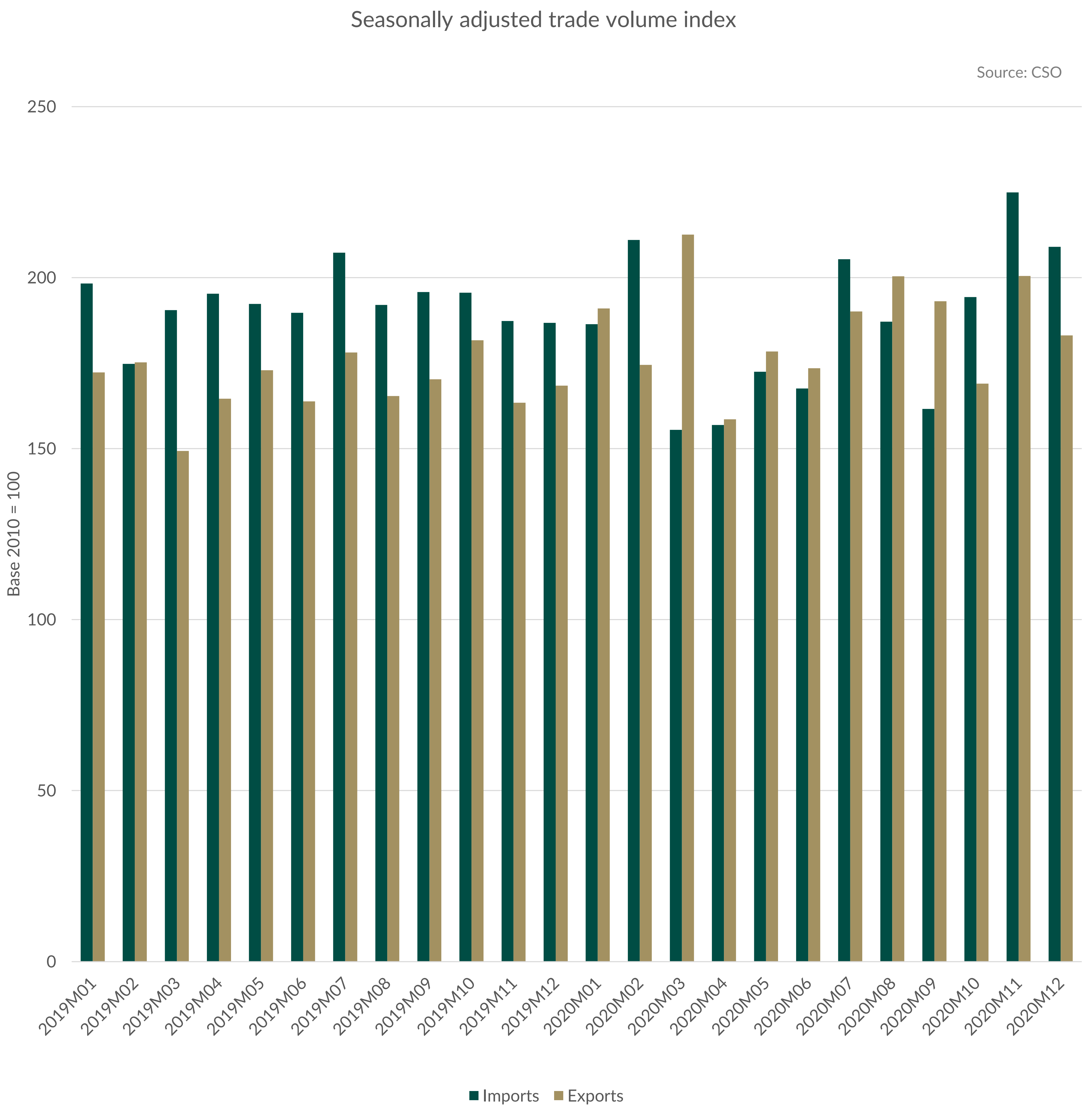




Covid-19 Impact on D/Transport Sectors







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