



EA Maven

The Republic of Ireland
AAM Market Assessment Report

Future Mobility Campus Ireland

www.eamaven.com

Team



Darrell Swanson
Director | Co-Founder

- ▶ 25 years' experience in airport master planning, design, acquisition due diligence
- ▶ Electric aviation thought leader with reference to the evolution of Distributed Aviation as enabled by electric propulsion systems
- ▶ Development of country wide demand modelling for electric aircraft operators
- ▶ NASA TVF Working Group Leader/Advisor
- ▶ Board member of the British Aviation Group
- ▶ Advisor to CAMI, ADS AAM, VFS, Flight Crowd and Civata Global on Electric Aviation



Jarek Zych
Director | Co-Founder

- ▶ 16+ years of experience in the commercial aviation sector focusing on airline and airport network development services
- ▶ Development of advance air mobility demand modelling tool and regional air mobility indexing method
- ▶ Development and optimisation of airline networks, schedules, operations, fleet, and revenues
- ▶ Strategy development and route analysis resulting in British Airways, Lufthansa and Hainan Airlines establishing services at San Jose, Air France at Taipei including network development, business planning and market assessment projects
- ▶ Advising leading airlines and airports by providing traffic, schedule, and real-time aircraft operations data

Advanced Air Mobility will change the 'why' you choose to fly

EA Maven is a management consultancy firm focusing on solving the key challenges in Advanced Air Mobility (AAM) through the provision of AAM strategy support, demand modelling, infrastructure design and due diligence services.

AAM Demand
Modelling &
Scheduling



AAM Air Service
Development



AAM Market
Assessment



Advanced
Air Mobility
Infrastructure



AAM Air/Vertiport
Acquisition
Due Diligence



AAM Carbon
Emission Savings
Assessment



AAM Revenue
Forecasting





FUTURE MOBILITY
CAMPUS IRELAND

The Republic of Ireland AAM Market Assessment Report

Future Mobility Campus Ireland


Methodology

Summary


Population of The Republic of Ireland by County

source: CSO Ireland, EA Maven analysis

Cities and Airports




123
All cities under study*



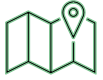
16
All airports under study

* within 166 LEA shapes (Dublin includes 31 shapes, Cork 5, Waterford, Limerick, Galway 3, Bray, Athlone, Dundalk 2)

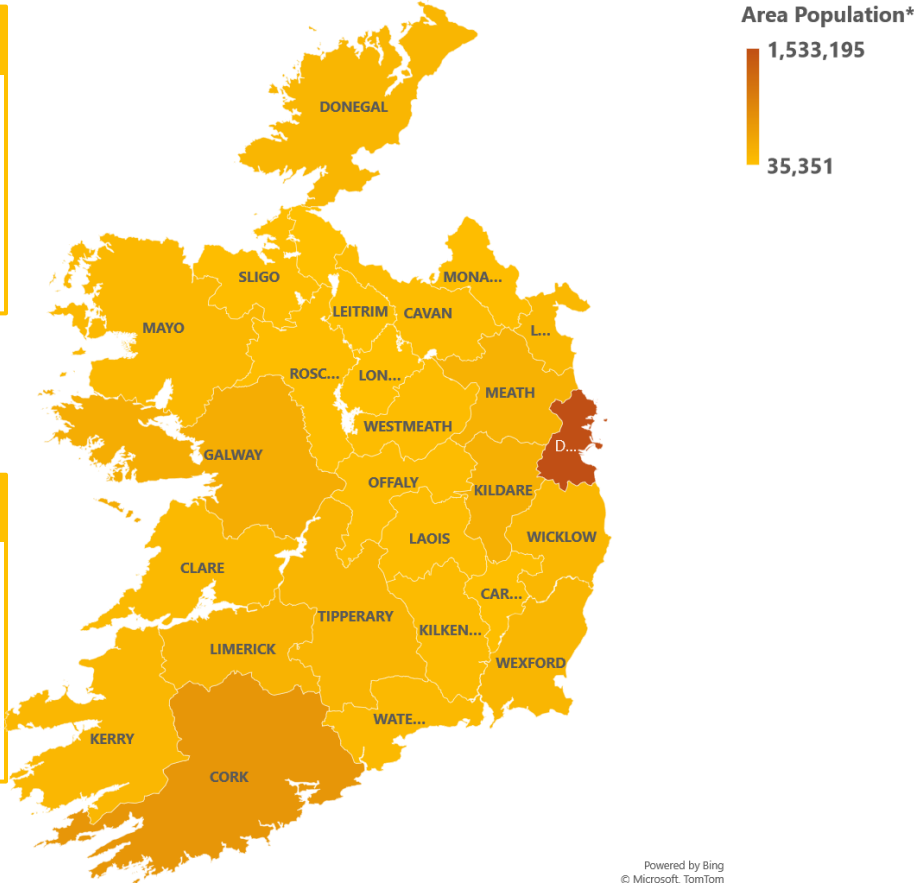
Population



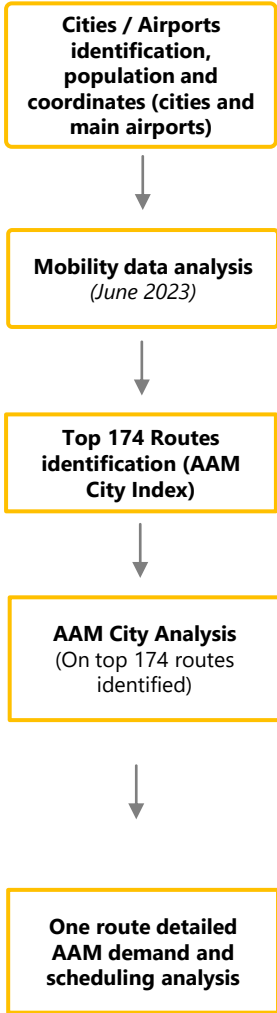
2.8m
All cities under study



5.2m
All areas under study



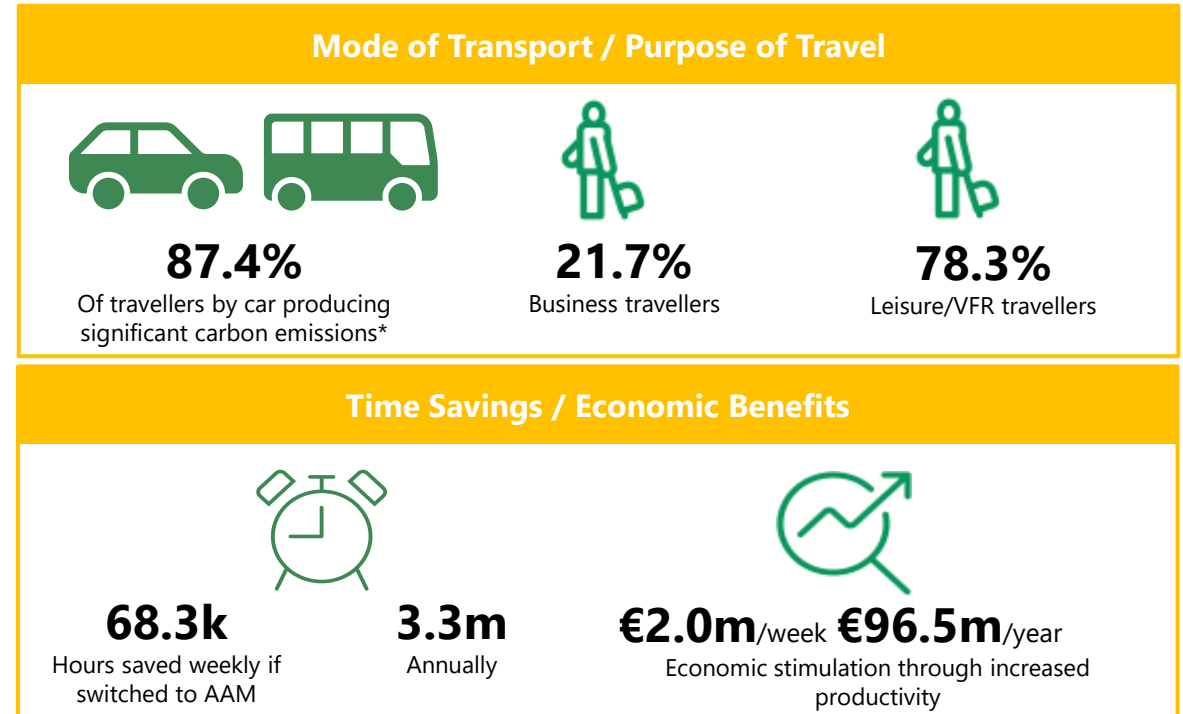
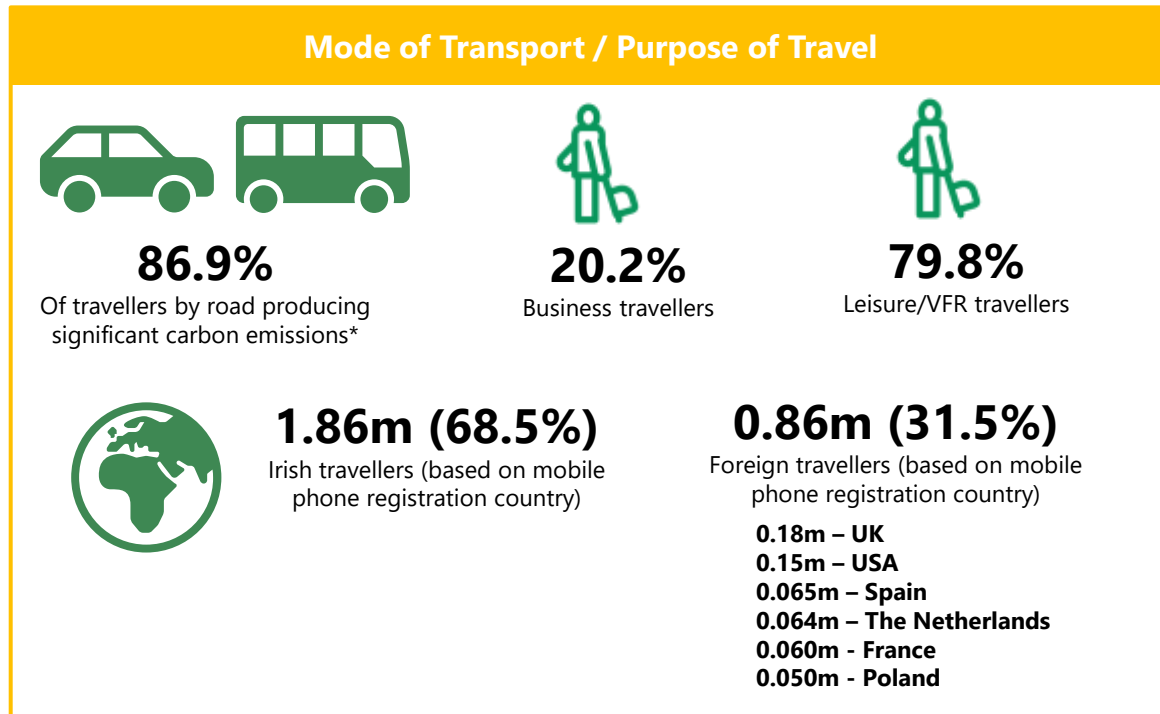
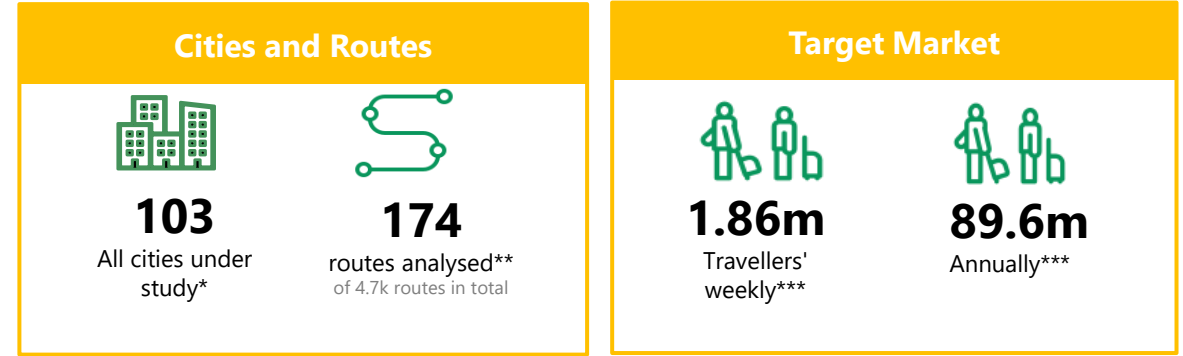
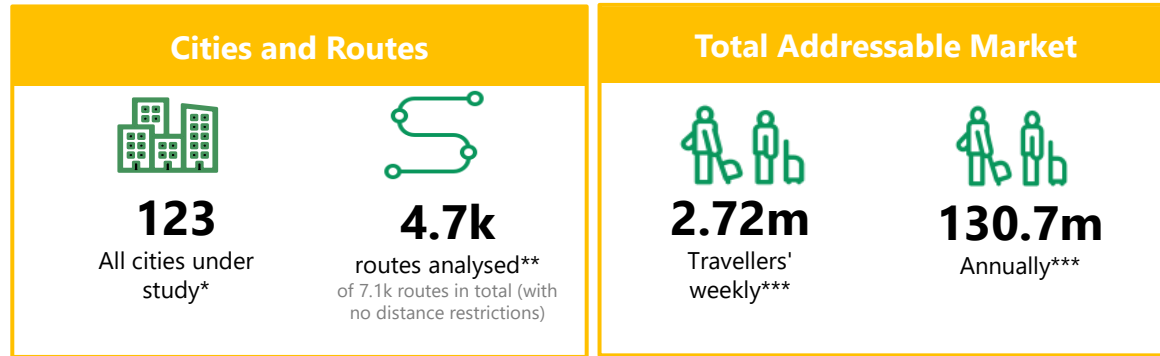
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- Based on Ireland LEA spatial division (166 local electoral shapes + 16 airports) identification of cities/airports coordinates and population. LEA shapes population vs cities population analysis and comparison
- Identification of all possible routings between cities, cities-airports, airports-airports
- Distances calculations
- Identification of total demand (weekly) between cities, airport-cities, airports-airports based on selected criteria:
 - min/max distance thresholds (30-120 miles, optimal range for eVTOL)
 - min city/shape population
- Demand analysis: mode of transport (road, rail), purpose of travel (business/work vs leisure/VFR),
- Identification of the top routes based on the selected criteria:
 - Distance thresholds (30-120 miles, optimal range for eVTOL)
 - Population between points (min 1k population per point)
 - Min weekly demand between points
- Indexing analysis on:
 - Straight line distance and AAM/RAM travel time vs driving distance and travel time (ratios)
 - Gross Disposable Household Income (GDHI)
 - Propensity to travel (trips per 100k inhabitants)
 - Weighting factors
 - City/airport networking potential analysis
 - Criteria importance assignment
- Selection of one route for further detailed analysis:
 - AAM demand modelling (EA Maven in-house model) – how many travellers would switch to new AAM services based on frequencies assumed.
- Scheduling analysis:
 - # of aircraft required
 - Daily and annual ac utilisation, load factors
 - Revenue, economic stimulation, carbon emission savings

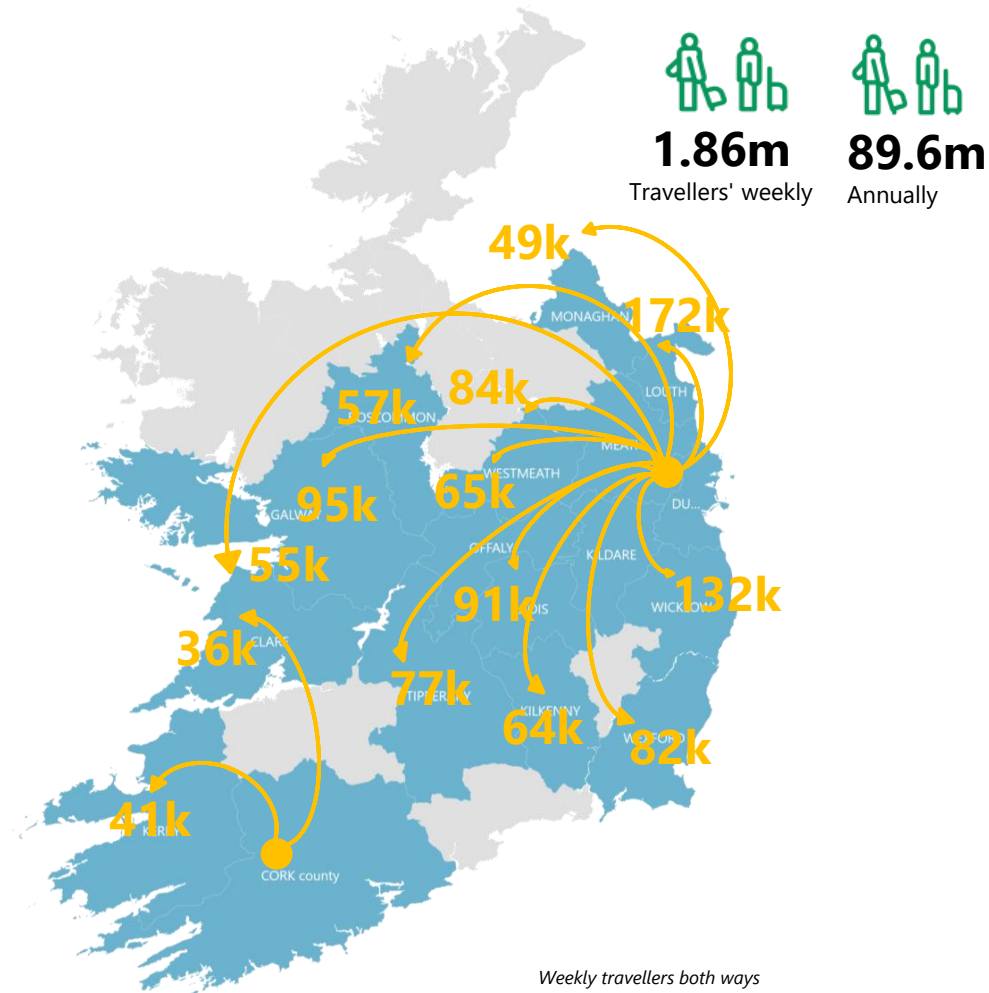
Executive Summary

UAM City Index - Selected Routes Indexed

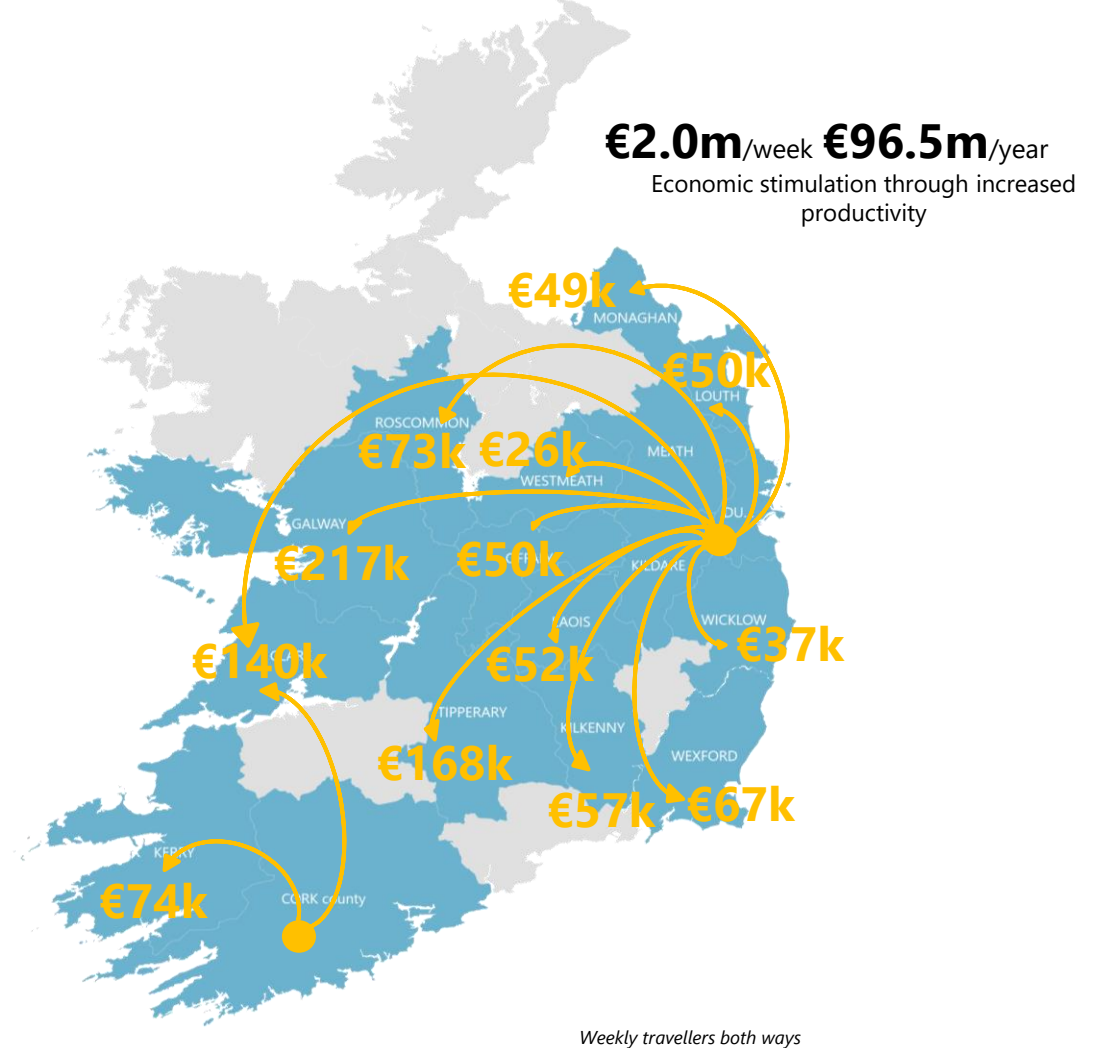


Ireland Market Assessment Analysis

UAM City Index – Regional Traffic



UAM City Index – Economic Boost

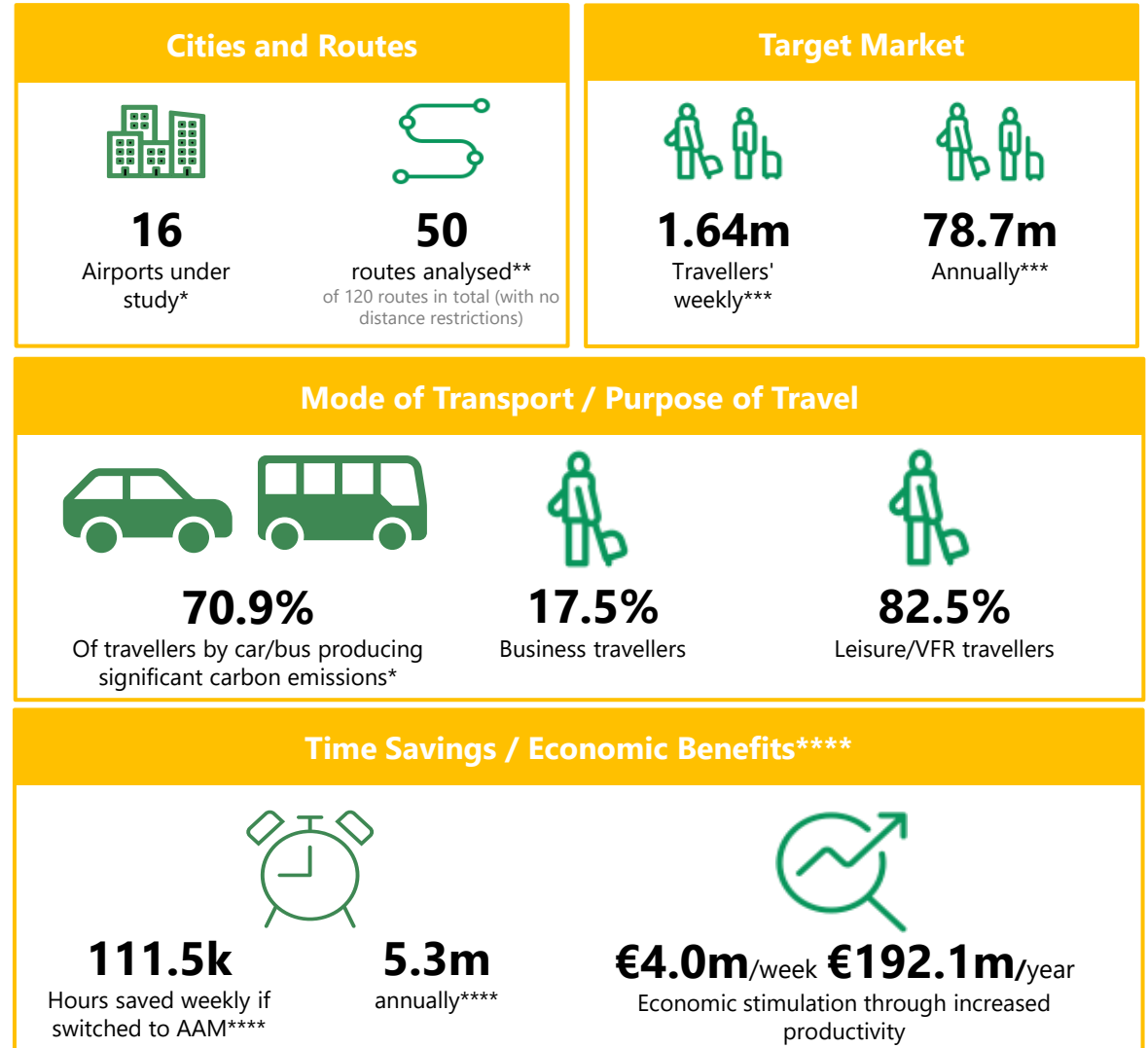


Executive Summary

Regional Air Mobility Index - Selected Routes Indexed



* Based on LEA Ireland spatial division of 166 shapes. 16 airports' shapes plus the corresponding catchment areas.
 ** Total possible routings between all 16 airports (and respective catchment areas) within distance (80-500 statute miles)
 *** Sum of all travellers on 50 routes analysed.
 **** Based on EA Maven regression analysis of people likely to switch modes on all routes assuming optimal scenarios.





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