

# **The Future Development of Air Transport in the United Kingdom: A National Consultation**

**A Report on Responses to the Government's  
Consultation: Wales**



The statements made and opinions expressed in this publication are solely the responsibility of the authors and do not necessarily reflect the views and opinions of the Secretary of State for Transport, the Department for Transport, its ministers or officials.

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A Report on Responses to the Government's Consultation: Wales

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<b>A REPORT ON RESPONSES TO THE GOVERNMENT'S CONSULTATION</b>	<b>Report 8 Wales</b>
<b>Background</b>	

## Background

### A New Deal for Transport

A1 The Integrated Transport White Paper, *A New Deal for Transport: Better for Everyone*, published in July 1998, announced the Government's intention to produce a new UK airports policy that would look 30 years ahead. Since that date, the Government has undertaken a number of wide-ranging consultations, discussions with stakeholders, surveys and independent studies to help inform its policy decisions. This report is one component of that process of consultation and investigation. Other principal inputs are set out below.

### The Future of Aviation

A2 Between December 2000 and April 2001 the Government consulted upon the main issues to be addressed by the White Paper. Around 550 responses were made to that consultation exercise, *The Future of Aviation*, and a summary of responses was published on the Department for Transport's web site [www.dft.gov.uk](http://www.dft.gov.uk) in November 2001.

### Regional Air Services Studies

A3 A programme of studies was carried out to look at Regional Air Services between 1998 and 2002. This was carried out in three parts. Part 1 comprised six Regional Air Service (RAS) studies covering:

- Midlands;
- Northern Ireland;
- North of England;
- Scotland;
- South West;
- Wales.

A4 These studies gathered up to date information on aviation, assessed future needs and highlighted the major issues that needed to be addressed.

A5 Part 2 involved the co-ordination of the RAS studies and audited them for consistency and also looked at a range of cross regional issues. This work was known as RASCO (Regional Air Services Co-ordination) and identified where there might be constraints, what they might be and what would be necessary to address them, for example, runway extensions, new terminals, new runways.

A6 RASCO identified that additional runways might be required in the Scottish Central Belt and in the Midlands. Additional work (Part 3 Runway Studies) was carried out for Glasgow and Edinburgh, and Birmingham and East Midlands.

### South East and East of England Regional Air Services Study (SERAS)

A7 The SERAS study, which began in 2001, examined a wide range of options for the South East, ranging from no development other than that already permitted or under consideration in the planning system, to additional runway and terminal capacity to meet demand in full.

A8 The Department for Transport considered some of the more technical or detailed issues in separate studies. A list of supporting documents can be found in the annexes to the consultation documents.

<b>A REPORT ON RESPONSES TO THE GOVERNMENT'S CONSULTATION</b>	<b>Report 8 Wales</b>
<b>Background</b>	

## The Future Development of Air Transport in the United Kingdom

A9 The results of the regional air services studies informed the seven consultation documents published collectively as [The Future Development of Air Transport in the United Kingdom](#) in July-August 2002.

### NOP Questionnaires

A10 Alongside the seven consultation documents, the Government commissioned NOP to publish seven questionnaires which asked for views on issues covered in the consultation documents. Over 66,000 completed questionnaires were received and analysed by NOP and the results can be seen on DfT's web site [www.dft.gov.uk](http://www.dft.gov.uk).

### Consultation Events

A11 Consultation events and exhibitions were held across the UK to enable a wide range of stakeholders and members of the general public to meet with Government Officials and their consultants to discuss the issues raised and seek additional information.

### Subsequent Developments

A12 Since the publication of the consultation documents in July 2002, there have been a number of developments which respondents believe affect particular development options, the UK air transport industry or the global economic or environmental context. These developments are additional considerations for the Government in determining its policy for air transport in the UK and, to the extent that they are reflected in the responses to the consultation documents, they have been addressed in AviaSolutions' analysis. They include (the list is not exhaustive) -

- the war in Iraq and, in combination with the events of 11 September 2001, its effect on the global demand for air travel;
- the publication by Birmingham International Airport Limited of an alternative runway option for Birmingham airport;
- the publication by London Luton Airport Operations Limited of alternative runway options for Luton airport;
- the publication by BAA plc of alternative runway options for Heathrow and Gatwick airports and British Airways' alternative runway option for Heathrow airport;
- the results of the study into the feasibility of rail links to Glasgow and Edinburgh airports;
- the decision by Office of the Deputy Prime Minister to approve the development of Finningley airport near Doncaster;
- the outcome of the Department for Transport's multi-modal studies; and
- the results of the study undertaken on the future of air transport in the far South West of England.

A13 In addition, the Government announced in its 2002 Pre-Budget Report that it would discuss with stakeholders the most effective economic instruments for ensuring that the aviation industry is encouraged to take account of and, where appropriate, reduce its contribution to global warming, local air and noise pollution.

A14 Its report, [Aviation and the Environment: Using Economic Instruments](#), published in March 2003, provided a platform for discussions with stakeholders. It set out estimates of aviation's external costs and outlined the Government's approach to using economic instruments. It also asked questions about the effectiveness and desirability of economic instruments for this sector.

<b>A REPORT ON RESPONSES TO THE GOVERNMENT'S CONSULTATION</b>	<b>Report 8 Wales</b>
<b>Background</b>	

A15 In addition to the views that were expressed during the stakeholder discussions, a number of stakeholders provided the Department for Transport and HM Treasury with a written response to the issues and questions raised in the report. Those submissions are not included in this report, but where respondents to the consultation documents did raise points relating to the use of economic instruments, they have been noted in this analysis.

## The UK-wide Report

### The Consultation Exercise

- B1 In July 2002, the Government published seven consultation documents on *The Future Development of Air Transport in the United Kingdom*. The Scottish and Welsh documents were published jointly with the Scottish Executive and the Welsh Assembly Government respectively.



**Figure 1 – Regional Consultation Document Areas**

- B2 The Government published revised versions of the South East main and summary consultation documents at the end of February 2003, following the decision of the High Court in November 2002 that options for runway development at Gatwick should be included. The Government also issued revised NOP questionnaires to take into account the Gatwick option. Respondents were invited to replace or supplement their original responses if they wished to do so, and the consultation period was extended to 30 June 2003 to allow time for this.
- B3 The Department for Transport (DfT) received over 400,000 responses to the consultation exercise. Some were detailed submissions; a large number of people across the UK completed NOP's questionnaire; and there were many thousands of individual letters. Some respondents addressed a large number of the issues raised by the consultation documents, while others concentrated their responses on a particular area of the UK, a specific issue, or a single option for development.

### The Process of Analysis

- B4 A team of consultants was appointed to analyse responses from those organisations and individuals that submitted detailed and often technical submissions to the consultation documents.
- B5 It was expected that there would be a large number of responses to the consultation and that these would cover a range of complex issues. A database was therefore created to assist with the logging and analysis of responses.

<b>A REPORT ON RESPONSES TO THE GOVERNMENT'S CONSULTATION</b>	<b>Report 8 Wales</b>
<b>The UK-wide Report</b>	

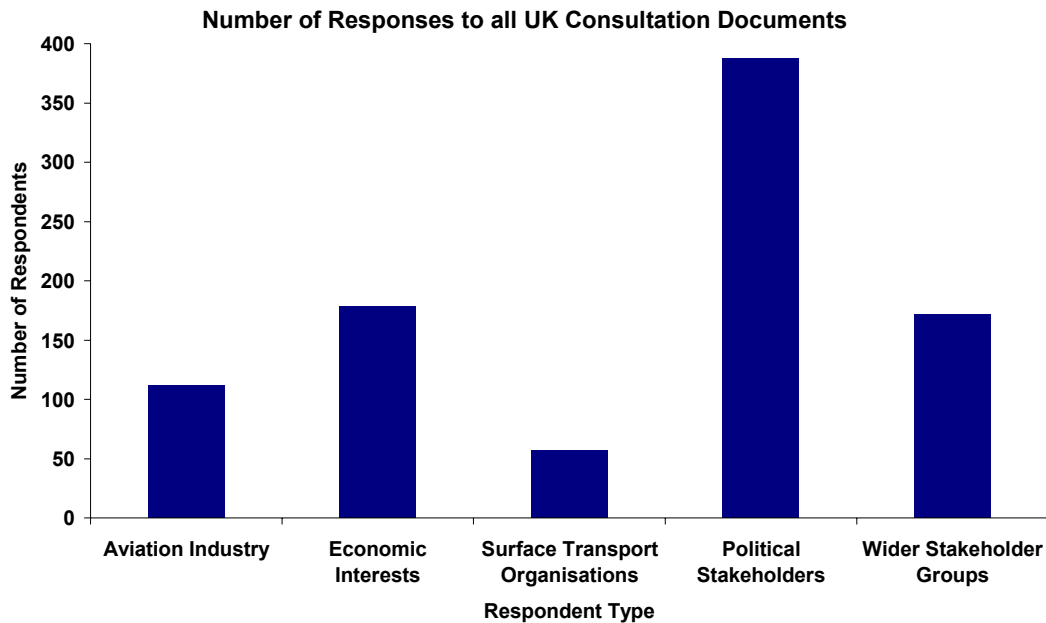
## Analysis

- B6 The key objectives of the analysis undertaken were to -
- capture respondents' submissions accurately and consistently;
  - provide the DfT with a clear understanding of the issues, concerns and wishes of stakeholders;
  - demonstrate a clear audit trail; and
  - make the process transparent.
- B7 Each response was allocated to a 'home region' for the purpose of entry onto the database. In most cases the postal address of the respondent determined the home region. However, those respondents with interests across the UK, for example British Airways, and those respondents from outside the UK, for example Delta Airlines, were designated as 'national' and 'international' respectively.
- B8 It should be noted that the home region of a respondent did not restrict their ability to comment on development proposals for other regions. Respondents were able to respond to as few or as many of the proposals in the consultation documents as they wished. For example a respondent from Northern Ireland was able to respond to proposals in the South East and / or the Midlands.

## The Grouping of Respondents

- B9 The views of respondents have been grouped, and presented throughout the report, in 5 categories -
- **Wider Stakeholders** – which includes both national and local environmental groups, consultative committees, airport development opposition groups;
  - **Surface Transport Organisations** – which includes bus, coach and rail operators and other organisations representing surface transport interests;
  - **Political Stakeholders** – which includes county, district and borough councils, members of parliament (national, devolved and European), devolved administrations, and regional assemblies;
  - **Economic Interests** – which includes regional development agencies, enterprise agencies, chambers of commerce, business interests and trades unions; and
  - **Aviation Industry** – which includes airlines, airports, aircraft manufacturers, aircraft maintenance providers and direct suppliers to the aviation such as ground handling and aircraft catering.

B10 A total of 907 responses were analysed, which were distributed between the 5 respondent categories as follows –



B11 Numerically Political Stakeholders dominate and Surface Transport Organisations have the smallest representation, although there are regional variations.

### **The Quantitative Nature of the Analysis**

B12 When reading the results of responses to individual questions, it should be borne in mind that at times the respondent sample size for a question may be small, and the conclusions that may be drawn from the analysis, may be limited in consequence.

B13 The analysis is predominantly represented in tabular or graphic form together with explanatory text. Where appropriate, the text draws on individual responses to illustrate a commonly held view, to articulate dissenting views, or to highlight an important perspective or insight.

### **The Organisation of the Report**

B14 This report can be read in its totality to provide a UK wide perspective for all parts of the UK. Alternatively there are individual documents available for each part of the UK and also for National and Cross Regional Issues (as set out in the table below) for those whose interest is limited to a particular region of England, or to Scotland, Wales or Northern Ireland.

B15 The report is structured as follows:

Report	Title
1	National and Cross Regional Issues
2	Midlands
3	North of England
4	Northern Ireland
5	Scotland
6	South East
7	South West
8	Wales

<b>A REPORT ON RESPONSES TO THE GOVERNMENT'S CONSULTATION</b>	<b>Report 8 Wales</b>
<b>The UK-wide Report</b>	

B16 Report 1 brings together a range of issues that respondents have raised and which are of relevance to either the whole of the UK or to more than one geographical area of the UK.

## The Wales Report

### Synopsis

B17 In the Wales consultation document the UK Government set out the context for their consultation on the future of aviation -

- The UK Government aims to define a long-term sustainable aviation policy up to 2030 which will maximise the benefits of airports and air services to Wales whilst minimising the negative impact and allow those concerned to plan with greater certainty.
- For Wales:
  - aviation makes a significant contribution to the economy and to social welfare, directly supporting 3,180 jobs with a further 6,000 indirectly or in other parts of the Welsh economy;
  - air services are often the only realistic means of reaching many international destinations and they also provide a convenient means of travelling to some other parts of the UK. Business and leisure passengers in Wales make good use of air travel for domestic as well as international leisure journeys;
  - air services have a vital role in reducing travel times, increasing accessibility and therefore improving economic efficiency and productivity;
  - air services serve an important role in attracting inward investment, particularly from overseas, help to stimulate and sustain the growth of local businesses by opening up new markets and supply chains;
  - airports are also frequently the focus of clusters of business serving the aviation industry directly or requiring easy and frequent access to air services;
  - key growth sectors such as hi-tech industries and tourism are important sectors within Wales which require easy and convenient access to air services to serve important markets both within the UK and in principal export markets in Europe and North America; and
  - aviation accounts for 1.3% of the Wales's GDP.

B18 A sustainable long-term strategy for Wales means finding the right balance between benefits and impacts, and determining how impacts on people living close to airports, the built and natural environment and surface access infrastructure and services might be mitigated and managed.

B19 The questions contained in the Wales consultation document (which are set out in Annex A of this report) aim to gather respondents' views on the issues that are key to the development of that long-term sustainable aviation policy.

**Organisation of this Report**

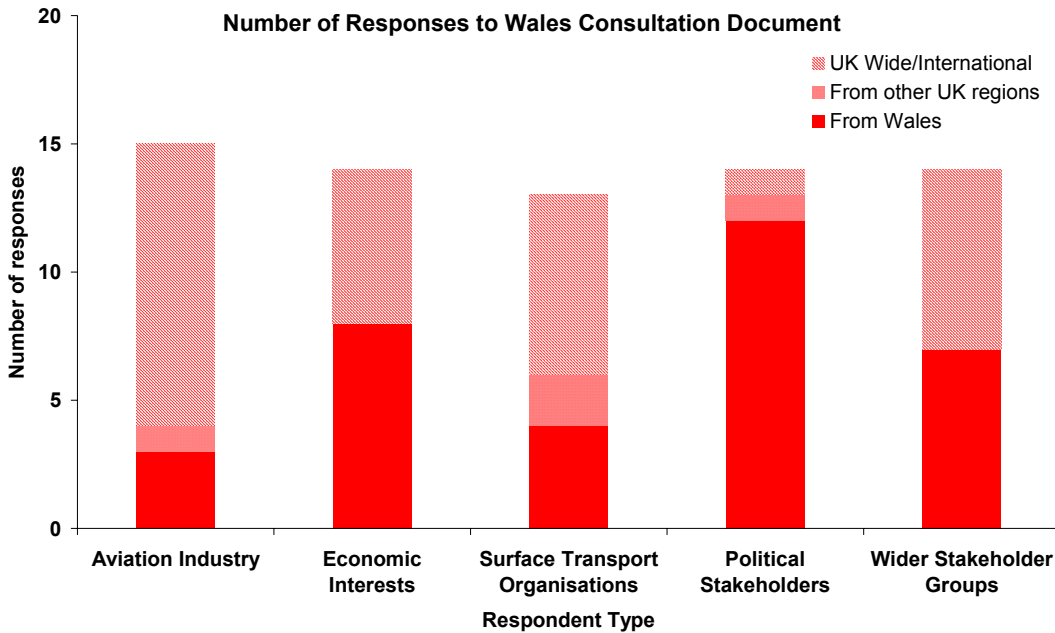
B20 To assist way-finding through this report, at the head of each section is a graphic, like the one below, which indicates the issue under consideration and the order in which issues are being looked at.

<b>Should Additional Airport Capacity be Provided</b>
Where to Provide Any New Airport Capacity
Competition v Complementary Development
The Economic Benefits of Air Travel
Social Inclusion
Environmental Impacts
Surface Access
Regional Access
Domestic Air Services for Wales
Aviation Strategy for Wales

B21 Each section of this report begins with a brief introduction setting out the principal issues to be explored in that section, and a synopsis of the relevant part of the Wales consultation document to provide context for the analysis. The introduction concludes with a summary of respondents' views.

B22 Following the section introduction is the detailed analysis of respondents' views.

B23 AviaSolutions received 70 responses to the Wales consultation document which were distributed across the 5 respondent categories as follows:



B24 There were similar numbers from each of the groups but from those within Wales, Political Stakeholders dominate. The varying numbers of respondents within each category should be borne in mind when reading the report, as no mechanism has been employed by AviaSolutions to weight responses or otherwise counteract the effects of a purely numerical analysis.

<b>A REPORT ON RESPONSES TO THE GOVERNMENT'S CONSULTATION</b>	<b>Report 8 Wales</b>
<b>The UK-wide Report</b>	

B25 The analysis is predominantly represented in tabular or graphic form together with explanatory text. Where appropriate, the text draws on individual responses to represent a commonly held view, to articulate dissenting views, or to illustrate a particular perspective or insight.

## Should Additional Airport Capacity be Provided?

<b>Should Additional Airport Capacity be Provided?</b>
<a href="#">Where to Provide Any New Airport Capacity</a>
<a href="#">Competition v Complementary Development</a>
<a href="#">The Economic Benefits of Air Travel</a>
<a href="#">Social Inclusion</a>
<a href="#">Environmental Impacts</a>
<a href="#">Surface Access</a>
<a href="#">Regional Access</a>
<a href="#">Domestic Air Services for Wales</a>
<a href="#">Aviation Strategy for Wales</a>

### Introduction

- 1.1 This section is about the principal issue of whether or not the Government's policy to 2030 should support additional capacity at the UK's airports. It looks at the degree of support to be found for policy scenarios, which range from constraint to growth; the social, environmental or economic reasons why respondents favour one scenario over another; and the policy mechanisms that would help to deliver those scenarios. It explores the relationship between providing airport capacity in Wales and in the South East of England.
- 1.2 The section draws on respondents' commentary on the matters contained in Questions 1 to 6 under the heading National Policy Scenarios in Section 8.3 of the Wales consultation document.

### Synopsis of Relevant Part of the Wales Consultation Document

- 1.3 The UK Government utilised four illustrative national policy scenarios and two regional spatial scenarios to forecast the potential volume and distribution of passengers under a range of circumstances, ranging from constraint to growth. They were:
  - *RASCO Reference Case (RRC)*, where 300 million passengers per annum (mppa) would pass through airports in the South East by 2030, (in Northern Ireland, a UK-Wide Unconstrained (UKU) scenario was put forward, which set out the same growth options as RASCO, but with specific constraint on Belfast City Airport);
  - *South East Constrained (SEC)*, which would limit capacity at the London airports to the level already permitted (pre the Terminal 5 approval at Heathrow), but would not constrain the growth of airports outside the South East;
  - *UK Wide Constrained (UKC)*, in which growth would be severely constrained in all parts of the UK, and reinforced by measures to limit environmental impacts;
  - *Facilitated Growth (FG)*, which would actively encourage all airports to grow and maximise the related economic benefits;
  - *Fly Local* encouraged local airports within a region or country to meet as much growth as possible, as opposed to -
  - *Concentrated Growth*, where a region's or country's demand for air travel would be focused on a limited number of airports to attract services to more destinations and with greater frequency.
- 1.4 The Government suggested some policy levers that might be available to help deliver one or more of the scenarios. These were:
  - use of the land use planning system;

- encouraging air services at airports outside the South East of England;
- slots policy at South East of England airports;
- financial levers;
- regulatory or voluntary frameworks;
- competitive or complementary development of airports;
- surface access schemes and charges; and
- availability of airspace.

## Summary of Findings

- 1.5 This section had one of the highest response rates with 56 out of the 70 respondents answering at least one question.
- 1.6 Of those that responded on policy scenarios, there was more support for the growth scenarios (RRC and FG), predominantly from national Aviation Industry and Economic Interests, than for the constraint scenarios (UKC and SEC), supported more by Welsh Political and Wider Stakeholders. Others suggested scenarios with either constraint or suggestions for meeting demand, without identifying scenarios suggested in the consultation document. On spatial scenarios, there was most support for Fly Local which, for Wales, would mean less leakage to other regions. The main reasons for selecting a preferred scenario were environmental, selected by all groups, followed by economic and aviation competitiveness reasons, selected more by Aviation Industry, Economic Interests and Political Stakeholders.
- 1.7 For the UK as a whole, 17% of respondents commented that the forecasts were too high and there were also many comments about the use of unconstrained demand forecasts. However, for Wales, only 4 out of 70 respondents took this view.
- 1.8 On the question of how much additional capacity should be provided in the South East, most called for additional capacity to be provided in line with demand, mostly from the Aviation Industry and Economic Interests. A few respondents said no additional capacity should be provided. Others called for some additional capacity without specifying how much. On the question of where additional capacity should be provided in the South East of England, Heathrow was selected most, followed by Gatwick, Stansted and Luton.
- 1.9 There were a number of suggestions for other policy scenarios, most of which involved some form of constraint. Most respondents said that their preferred scenario would best support the Government's sustainability objectives because it would balance economic, social and environmental considerations.
- 1.10 The most popular policy mechanisms for scenario delivery were prioritising surface access, the encouragement of air services at regional airports, some of which called for public financial support and the use of the planning system to constrain or facilitate development. There were a number of comments about fiscal measures designed to constrain demand.

## Respondents' Views

**Question 1: Which, if any, of the National Policy Scenarios do you think should form the basis of the UK Government's national airports strategy to 2030 and why? Considerations might include:**

- Enhancing consumer choice and accessibility to air services;
- Fostering a strong and competitive airline industry;
- Facilitating existing businesses to compete effectively in global markets;
- Attracting inward investment and inbound tourism;
- Ensuring aviation develops sustainably and minimises environmental impacts of growth;
- Minimising distance people have to travel;
- Reducing congestion; and
- Encouraging the use of public transport.

**Table 1 – Which National Policy Growth Scenarios Should Form the Basis of the UK Government's National Airports Strategy to 2030?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
RASCO Reference Case (RRC)	5	4		1	2	12
UK Wide Constrained (UKC)			1		5	6
South East Constrained (SEC)		1	1	3		5
Facilitating Growth (FG)	3	1		1		5
Other	1	1		2	4	8
<b>Total Responses</b>	<b>9</b>	<b>7</b>	<b>2</b>	<b>7</b>	<b>11</b>	<b>36</b>
No Response	6	7	11	7	3	34
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

- 1.11 Table 1 shows respondents' answers to the growth scenarios part of Question 1. The RRC scenario was supported predominantly by national Aviation Industry and Economic Interests, whereas the UKC and SEC scenarios were supported more by Welsh Political and Wider Stakeholders.
- 1.12 The Welsh Consumers Council supported the RRC scenario and would welcome the related significant increases in destinations available at Cardiff International Airport. The FG scenario, which involves encouraging growth, was supported by the Wales Tourist Board and Cardiff International Airport.
- 1.13 The Countryside Council for Wales thought that the UKC scenario was most in line with the requirements of sustainability. Flintshire County Council and the Vale of Glamorgan Council supported the SEC scenario.
- 1.14 The 'Other' category includes both those advocating constraint and suggestions for meeting demand, without identifying scenarios suggested in the consultation document. The Environmental Law Foundation believed that the starting point for assessment should be a sustainable level, with a burden on showing how growth may be achieved without incurring adverse environmental effects. The South East Wales Economic Forum considered the case for a new South Wales airport based on two scenarios - RRC and SEC.

**Table 2 – Which National Policy Spatial Scenarios Should Form the Basis of the UK Government's National Airports Strategy to 2030?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Fly Local	2	5	1	2		10
Concentrated Growth		1		3		4
Other	2	1			5	8
<b>Total Responses</b>	<b>4</b>	<b>7</b>	<b>1</b>	<b>5</b>	<b>5</b>	<b>22</b>
No Response	11	7	12	9	9	48
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

- 1.15 Table 2 shows the breakdown of the 22 respondents that answered the spatial scenarios part of Question 1. Support for the Fly Local scenario came from all except Wider Stakeholder Groups, including the Wales Tourist Board and Sustrans Wales. The Welsh Consumer Council considered that the preferred option for consumers in Wales was to be able to fly locally. Travelwise Cymru called for the development of a number of Welsh airports and the encouragement of their use.
- 1.16 There may have been some misinterpretation of the Concentrated Growth scenario because, unlike other parts of the UK, it meant more leakage to England and lower levels of traffic at Cardiff (see paragraph 4.2.21 of the Wales consultation document). Telford & Wrekin Council noted that both Birmingham Airport and smaller airports in the Midlands could serve parts of Wales. The Royal Town Planning Institute noted that the Concentrated Growth scenario did not include the option of developing Cardiff International Airport as a regional hub.
- 1.17 In a supplementary combined response a number of regional airports - Belfast International, Teesside, Liverpool, Cardiff, Prestwick, Sheffield and Doncaster Finningley - came together to submit a joint representation over the Concentrated Growth scenario. They strongly rejected it as being anti-competitive and one that threatened to interfere with the normal, healthy commercial market for UK airports. They believed it to be totally contrary to evolving market conditions and that the end result of such a policy would be to force the market back into the previously inefficient, monopolistic regime from which it had naturally moved on.
- 1.18 Eight respondents made comments categorised as 'Other'. These included British Airways, which noted that both spatial scenarios postulated public sector intervention, but the benefits were unlikely to outweigh the potential undesirable effects of intervention. Friends of the Earth – Abergavenny maintained that continuing growth in fossil-fuelled air transport growth was not sustainable. The Council for National Parks proposed that aviation should be planned and managed following the principles of sustainable development. The National Trust – Wales called for a greater emphasis on managing demand. The North Wales Economic Forum supported a scenario that encouraged the development of services at Manchester and Liverpool.
- 1.19 Having established levels of support for the various scenarios, respondents were asked to explain the reasons for their choices.

**Table 3 – Reasons for Scenario Choice**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
<b>Economy sub-total</b>	<b>4</b>	<b>8</b>	<b>1</b>	<b>8</b>	<b>2</b>	<b>23</b>
Good for economy	3	8		6	2	19
Attracting inbound tourism	4	6	1	4	1	16
Helping UK businesses compete in global markets	3	6	1	5	1	16
Attracting inward investment	3	5		2		10
<b>Aviation Competitiveness sub-total</b>	<b>4</b>	<b>6</b>	<b>1</b>	<b>5</b>	<b>3</b>	<b>19</b>
Fostering strong and competitive airline industry	2	6	1	5	3	17
Enhancing consumer choice	2	4		3	1	10
Minimise distances people need to travel	3	1		1		5
<b>Environment etc. sub-total</b>	<b>5</b>	<b>7</b>	<b>3</b>	<b>4</b>	<b>9</b>	<b>28</b>
Ensuring aviation develops sustainably	3	3	1	3	9	19
Reducing congestion	1	5	2	2	4	14
Minimising environmental impacts of growth	1	3	1	2	6	13
Rail/Air substitution			2	1	3	6
Encourage use of public transport	1	1	1		2	5
Forecasts too high				1	3	4
Other	3		2	1	1	7
<b>Total Answers</b>	<b>29</b>	<b>48</b>	<b>12</b>	<b>36</b>	<b>36</b>	<b>161</b>
<b>Total Responses</b>	<b>7</b>	<b>8</b>	<b>4</b>	<b>8</b>	<b>10</b>	<b>37</b>
No Response	8	6	9	6	4	33
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

The sub-totals represent the number of respondents that have given at least one answer in that subgroup

- 1.20 Table 3 gives the reasons for choosing the scenarios. Environmental reasons were most selected, broadly across all groups, followed by economic and aviation competitiveness reasons, selected more by the Aviation Industry, Economic Interests and Political Stakeholders.
- 1.21 Ensuring aviation develops sustainably was noted by Thomas Cook Airlines, CBI and Friends of the Earth. Minimising the environmental impacts of growth was mentioned by the National Trust and the Wales Tourist Board.
- 1.22 Being good for the economy and attracting inbound tourism were mentioned by the Institute of Welsh Affairs. Regional economic and inward investment reasons were noted by the Welsh Local Government Association. Inward investment was also noted by the Wales TUC and the Welsh Liberal Democrats.
- 1.23 Fostering a strong and competitive airline industry was noted by the GMB. Sustrans Cymru and the Welsh Consumer Council stressed the need to minimise travel distances.

### National Air Traffic Forecasts

- 1.24 In the Wales consultation document the Government set out its forecasts of passenger traffic to 2030 and described how the forecasts were used as the basis for appraising different options for new airport capacity. It did not specifically ask respondents for their views on forecasts but a sufficient number did make a range of comments that were identified during the analysis process. (For example, the number of respondents that felt the forecasts were too high are reported in Table 3 above).

- 1.25 Respondents views, both regionally and nationally, varied and covered forecasting methodology, comments on whether the forecasts were realistic, too low or too high, and whether the forecasts should be reviewed or not. Where respondents have commented on the forecasts, they have normally done so in the context of how they relate to the consultation document for the region they are in.
- 1.26 Nobody in Wales queried the forecasting methodology nor did anyone in the Aviation Industry challenge the validity of the forecasts. The Civil Aviation Authority's view, whilst accepting the inevitable uncertainties in looking forward over such a long period, was that the long-term forecasts were reasonably robust and experience suggested that long-term trend growth was resilient to shocks such as those faced by the aviation industry in recent years.
- 1.27 Many respondents from across the UK felt that the forecasts were too high and commented on the difficulties of predicting demand so far into the future. Nationally 149 respondents believed that the forecasts were too high, about 17% of the UK total sample of 907 responses. However, only 4 of the 149 responses were from Wales, a somewhat lower percentage of the Wales total sample of 70. It should be noted that those regions with relatively easy access to a choice of air services, the South East and the Midlands, produced a significantly higher ratio of 'too highs' than those regions whose access to air services were more limited. The 4 respondents to the Wales consultation document that felt the forecasts were too high were the National Trust Wales, the Wildlife Trust and the Welsh Local Government Association.
- 1.28 This use of unconstrained forecasts was the most common point raised by those highlighting flaws in the demand forecasts produced by the Government. According to many respondents, a number of factors had not been taken into account which, had they been, would have produced much lower demand forecasts. For example, one of the assumptions used in the forecasting model was that passenger fares would fall by 1% per annum up to 2020 and with greater competition, especially from no frills carriers, that figure could reduce at a faster rate. Several respondents queried whether this level of reduction could be sustained over such a period of time especially as many major carriers were currently struggling financially under existing conditions. With the possible introduction of environmental taxes and other fiscal measures, air fares were more likely to rise with the consequence that forecast demand would decrease. The National Trust Wales said that aviation strategy should reflect an approach consisting of a series of measures and policies which influenced the future demand for air travel, ensuring the costs of aviation reflected its wider environmental impacts and providing the opportunities and incentives for people to holiday at home.
- 1.29 Given the Government's commitment to an integrated public transport system some respondents felt that not enough attention, if any, was given in the forecasts to the development of alternative forms of transport especially high-speed rail links. Several respondents clearly felt that the forecasts did not acknowledge the possibilities for the substitution between short haul air and high-speed rail travel. The potential of Eurostar services operating on the completed CTRL to absorb up to 250,000 short haul air movements would have a significant impact on aviation forecasts. It was difficult to see why the considerable role high-speed rail could play in meeting demand for short haul travel was ignored as part of any sustainable air strategy. The Rail Passengers Committee Wales proposed that domestic and European flights should be replaced by high-speed rail.
- 1.30 Some of the respondents that questioned the Government's projections of passenger demand did so on the basis that they were more concerned about the effects of meeting such demand rather than whether or not the forecasts were valid. The Countryside Council for Wales said that to meet the Welsh Assembly Government's commitment to sustainable development needed an environmentally-driven policy scenario. Many of the organisations that queried the forecasts, both nationally and regionally, felt that they should be reconsidered in the light of the sensitivity of demand to variable world economic conditions and the possible application of fiscal measures.

**Question 2: If you think additional capacity should be provided in the South East to meet the needs of regional air passengers interlining or accessing services from London airports via surface modes:**

- **how much capacity do you think should be provided; and**
- **where in the South East should it be located?**

**Table 4 – How Much Capacity Should be Provided in the South East of England?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
No additional capacity			1	1	2	4
Limited extra capacity			1			1
Significant extra increase, but less than market demand						
Capacity in line with demand	8	3			1	12
Excess capacity (above commercial demand)						
Other	2	1		2	1	6
<b>Total Responses</b>	<b>10</b>	<b>4</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>23</b>
No Response	5	10	11	11	10	47
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

1.31 Table 4 shows respondents' answers to the first part of Question 2. 12 called for additional capacity to be provided in the South East in line with demand, mostly from the Aviation Industry and Economic Interests. 4 respondents said no additional capacity should be provided. In the 'Other' category, the 6 respondents called for some additional capacity without specifying how much.

1.32 Supporters of capacity in line with demand included Britannia Airways, British Airline Pilots Association and the Institute of Welsh Affairs. Those calling for no additional capacity included the Vale of Glamorgan Council, Friends of the Earth and the RSPB Cymru.

**Table 5 – Where in the South East Should Capacity be Provided?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Heathrow	8	4		1	1	14
Gatwick	5	4			1	10
Stansted	4	4				8
Luton	4	4				8
London City	1	1				2
Cliffe / New Site only	1				1	2
Other smaller airport(s)		2				2
Where meets consumer need	1			1	1	3
Other	1	2			1	4
<b>Total Answers</b>	<b>25</b>	<b>21</b>		<b>2</b>	<b>5</b>	<b>53</b>
<b>Total Responses</b>	<b>11</b>	<b>5</b>		<b>2</b>	<b>3</b>	<b>21</b>
No Response	4	9	13	12	11	49
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

- 1.33 Table 5 shows respondents' answers to the second part of Question 2, where more than one location could be chosen. Heathrow was selected most frequently, followed by Gatwick, Stansted and Luton. Many respondents selected more than one airport and most of these were national organisations. The response from Surface Transport Organisations, Political Stakeholders and Wider Stakeholder Groups was very limited.
- 1.34 Cardiff International Airport supported a 'regional' runway at Heathrow and additional capacity at Luton. Heathrow was also supported by the Welsh Local Government Association. The Institute of Welsh Affairs and Britannia Airways supported Gatwick as well as Heathrow. Stansted was supported in addition to Heathrow and Gatwick by Thomas Cook Airlines. The CBI and GMB supported additional capacity at all London airports.

**Question 3: Which of the scenarios will most enhance consumer choice and accessibility to services in:**

- the UK as a whole; and
- Wales.

- 1.35 There were only minor differences between the responses to this question and Question 1 above, thus the responses have not been repeated here.

**Question 4: Are there any other policy scenarios, including any combination of those set out in the document, which would better meet your aspirations for the development of regional air services and airports in Wales?**

- 1.36 There were 19 respondents to Question 4 that gave a variety of answers, but most involved some form of constraint.
- 1.37 Respondents favouring growth included British Airways which proposed that elements of both the FG and RRC scenarios should be adopted and the Wales Tourist Board which saw the development of regional airports to support the unmet demand from the South East as the best combination to meet future needs. The Town & Country Planning Association supported a scenario with new hubs in the Severn and Thames Estuaries.
- 1.38 Four respondents favoured no growth above current levels: Friends of the Earth – Abergavenny, Rail Passengers Committee - Wales, the Royal Commission on Environmental Pollution and the Woodland Trust. The National Trust – Wales believed that elements of RRC, SEC and UKC scenarios would be required to integrate social, economic and environmental considerations and there was a need to move from a narrow position of meeting demand to a policy of integrated, sustainable aviation which would mean managing demand using economic instruments. The Welsh Liberal Democrats rejected the 'predict and provide' approach and sought a solution that did not offer short-term answers whilst compounding long-term environmental problems.

**Question 5: The Government is committed to bringing forward policies for civil aviation and airports that are sustainable. Please explain why you think your preferred scenario best supports the Government's sustainable objective?**

**Table 6 – Why does the Preferred Scenario Support Government Sustainability Objectives?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Environmental	2	2	2	4	8	18
Economic	2	6			2	10
Social	3	1			1	5
Balances economic, social and environmental considerations	7	6	2	2	6	23
Other	1	2	1	2		6
<b>Total Answers</b>	15	17	5	8	17	62
<b>Total Responses</b>	8	9	3	5	10	35
No Response	7	5	10	9	4	35
<b>Total Sample</b>	15	14	13	14	14	70

- 1.39 Table 6 shows the views of the 35 respondents to Question 5. The most selected reasons for a preferred scenario were that it balanced economic, social and environmental considerations, followed by minimising environmental impact. Both of these were selected across all groups. In many respects this mirrored the reasons for choosing a scenario as set out in Table 3. The Council for National Parks proposed a demand management approach that would not permit capacity increases where these would cause environmental damage. The Royal Town Planning Institute for Wales noted the need to balance economic opportunities with environmental considerations and the Rail Passenger Committee Wales thought that the UKC scenario would be the least environmentally damaging.
- 1.40 Finally, within the section on whether airport capacity should be provided is the question of delivery mechanisms for the chosen policies.

**Question 6: Which of the policy mechanisms set out in Chapter 3 (of the Welsh consultation document) do you think are essential to delivering your preferred scenario? Are there any that you consider might assist in doing so but you do not consider essential? Are there any policy mechanisms not covered in Chapter 3 that you think should be considered?**

**Table 7 – Essential Policy Mechanisms to Deliver Scenario**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Prioritise Surface Access Improvements	3	8	2	4	5	22
Use Planning System to constrain or facilitate development	6	4	2	2	6	20
Encourage air services to use regional airports	3	7		5	1	16
Fiscal measures to limit demand	1	1	1	2	9	14
Slot Policy	2				3	5
Encourage airport competition / complimentary development	2	2				4
Restrictive regulatory or voluntary frameworks	1		1		2	4
Emissions Trading	2	1				3
Other	3	4		3	1	11
<b>Total Answers</b>	<b>23</b>	<b>27</b>	<b>6</b>	<b>16</b>	<b>27</b>	<b>99</b>
<b>Total Responses</b>	<b>8</b>	<b>11</b>	<b>3</b>	<b>7</b>	<b>10</b>	<b>39</b>
No Response	7	3	10	7	4	31
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

- 1.41 Table 7 shows the answers from the 39 respondents to the first part of Question 6. There were very few respondents to the other parts of the question. The most popular mechanisms proposed for delivering the preferred scenario were prioritising surface access, using the planning system and encouraging air services to use regional airports.
- 1.42 The Welsh Consumer Council, the Welsh Liberal Democrats and the Welsh TUC supported prioritising surface access improvements. The Royal Town Planning Institute in Wales supported improved surface access to Cardiff, as well as from Wales to Manchester, Birmingham and London.
- 1.43 Using the planning system was supported by, for example, Amicus-AEEU and the Town & Country Planning Association. The Rail Passengers Committee considered that use of the planning system was essential
- 1.44 Cardiff International Airport and Ceredigion County Council supported the encouragement of air services at regional airports. The Royal Institute of Chartered Surveyors thought that the provision of direct flights to a greater range of destinations might reduce pressure on the South East whilst contributing to regional economic growth and social benefits.
- 1.45 A number of respondents from across the stakeholder groups made specific comments in relation to the use of fiscal measures as potential policy levers. These are explained in the paragraphs below, which have additionally been considered in the separate report entitled "National and Cross Regional Issues", which formulates a national view on the matter.
- 1.46 Cardiff International Airport noted that 'polluter pays' appeared simple in principle but gives concern in practice and asked the Government to ensure that each competing form of transport abided by the same rules. The Rail Passengers Committee for Wales supported all the policy mechanisms suggested in the consultation document, but in particular called for support for the taxing of short haul flights and prioritisation of public transport schemes plus congestion charging and taxing car parking.

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- 1.47 Flintshire County Council supported financial demand management mechanisms. The Abergavenny and Crickhowell Friends of the Earth Group maintained that growth in fossil-fuelled air transport was not sustainable and called for a tax on aviation fuel. The Welsh Liberal Democrats called for the introduction of aviation fuel tax, increased landing charges to reflect the environmental burden and the use of Airport Passenger Duty to encourage the use of rail instead of domestic flights. The National Trust suggested that leading options for discussion included an aviation fuel tax, a Europe-wide emissions charge, slot auctions, and an international emissions trading scheme. British Airways and the Freedom to Fly Coalition also supported emissions trading. The Welsh Consumer Council was opposed to pricing mechanisms that constrain growth because of their impact on low income consumers.
- 1.48 In the next section respondents' views on the location of airport capacity in Wales are described.

## Where to Provide Any New Airport Capacity

<a href="#">Should Additional Airport Capacity be Provided?</a>
<b><a href="#">Where to Provide Any New Airport Capacity</a></b>
<a href="#">Competition v Complementary Development</a>
<a href="#">The Economic Benefits of Air Travel</a>
<a href="#">Social Inclusion</a>
<a href="#">Environmental Impacts</a>
<a href="#">Surface Access</a>
<a href="#">Regional Access</a>
<a href="#">Domestic Air Services for Wales</a>
<a href="#">Aviation Strategy for Wales</a>

### Introduction

- 2.1 This section elicits opinion about the principle of providing new airport infrastructure in Wales and about the specific suggestions for new infrastructure described in the Wales consultation document. It draws out respondents' preferred locations for growth or constraint, reflecting any proposals for growth over and above, or as alternatives, to those options suggested by the Wales consultation document. It reflects respondents' views on the importance of Wales accommodating its own demand, rather than relying on connecting at UK or mainland European hubs.
- 2.2 The section draws on respondents' commentary on the matters contained in Questions 1 to 5 under the heading Location of Airport Capacity in Section 8.3 of the consultation document.

### Synopsis of Relevant Part of the Wales consultation document

- 2.3 The Wales consultation document focused on Cardiff International Airport although there were also references to a new Severnside Airport in Chapter 4 and to other airports in Wales in the context of a network of Welsh domestic services in Chapter 7. For Cardiff, it is noted that the existing single runway is more than capable of handling current and forecast traffic but that incremental terminal and apron expansions, or new terminal option, may be needed with some of the scenarios. There were no detailed appraisals of the Severnside site.

### Summary of Findings

- 2.4 Sixty of the total of 70 respondents provided answers on where to provide additional airport capacity, making this the issue with the highest response rate.
- 2.5 Cardiff was selected by most respondents, across all groups, as the airport where growth should be accommodated. The most popular forms of development at Cardiff were improved road and rail access. There was only limited opposition to development at Cardiff. There was also support for additional infrastructure at smaller Welsh airports, but opposition to development at Hawarden and Swansea was noted.
- 2.6 Respondents indicated that improved surface access to main airports and feeder connections from Cardiff would enable Wales to meet more of its own demand.
- 2.7 A clear majority of respondents said that the existing airports could be developed to provide sufficient capacity. Proposals were put forward for various versions of a Severnside Airport, and there were comments both in support or opposition, with other calls for further study. There were specific comments from some respondents about the way in which a new Severnside Airport would not only prevent leakage to the South East but would also serve substantial areas of the South East.
- 2.8 Most respondents said that it was important for demand to be met, wherever possible, in Wales.

## Respondents' Views

**Question 1: This document [the consultation document] has described how airports in the region might develop, if policy is to meet demand. Do you have any comments on these suggestions for new infrastructure?**

**Question 2: If your preferred strategy for Wales involves accommodating growth in air services, where would the projected levels of growth best be accommodated and what form of airport development should be supported in order to achieve this?**

**Table 8 – Preferred Airport Location for Accommodating Growth**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Cardiff	4	9	3	4	2	22
Haverfordwest (Withybush) Valley	1	4	1	1	1	8
Swansea		4	1		1	6
Aberporth		3		1	1	5
Caernarfon		3		1	1	5
Hawarden (Chester)		3		1	1	5
Pembrey		3	1		1	5
Mona		3			1	4
Other	4	4		3	2	13
<b>Total Answers</b>	10	40	6	13	12	81
<b>Total Responses</b>	7	12	3	10	4	36
No Response	8	2	10	4	10	34
<b>Total Sample</b>	15	14	13	14	14	70

2.9 The respondents to Question 1 were generally positive, but examples of opposition are discussed in this section. Table 8 shows the respondents to Question 2. Cardiff was supported by all groups, for example by Thomas Cook Airlines, the Wales Tourist Board, the South East Wales Transportation Forum, the Welsh Local Government Association and the Institute of Welsh Affairs. Only 1 respondent, the Countryside Council for Wales, indicated concern about the expansion of Cardiff.

### Cardiff

**Table 9 – Comments on Development at Cardiff**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
<b>Development at Cardiff</b>						
Approve	4	11	3	3	1	22
Against / Better Use			1		3	4

**Table 10 – Cardiff Forms of Development**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
<b>Airport Infrastructure sub-total</b>	<b>4</b>	<b>6</b>	<b>3</b>	<b>2</b>	<b>2</b>	<b>17</b>
Extension to runway (with accompanying infrastructure)	1	1				<b>2</b>
Best use of existing runway	3	5	3	2	2	<b>15</b>
<b>Surface Access sub-total</b>	<b>5</b>	<b>8</b>	<b>5</b>	<b>2</b>	<b>3</b>	<b>23</b>
Rail access	3	7	4	2	3	<b>19</b>
Improved road access links	5	7	4	2	1	<b>19</b>
Additional car parking	2	1				<b>3</b>
Other	1	2	3	2		<b>8</b>
Total Answers	15	23	14	8	6	<b>66</b>
<b>Total Responses</b>	<b>6</b>	<b>9</b>	<b>6</b>	<b>3</b>	<b>4</b>	<b>28</b>
No Response	9	5	7	11	10	<b>42</b>
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

Note. Airport Infrastructure answers treated as mutually exclusive

The sub-totals represent the number of respondents that have given at least one answer in that subgroup

- 2.10 Table 9 shows respondents' answers to the second part of Question 1 relating to Cardiff and Table 10 shows answers to the second part of Question 2. Support for development at Cardiff clearly outweighed opposition. While 22 respondents are noted in Table 8 as supporting growth at Cardiff, 28 are noted in Table 10 as commenting on the form of development there. However, some of these comments relate to improved surface access that respondents may feel was required even without growth. Also, 14 of the 23 respondents that supported improved surface access also supported some form of airport infrastructure enhancement. The most frequently selected form of development was rail and improved road access, followed by best use of the existing runway, which included expansion of the accompanying terminal and apron/taxiway infrastructure.
- 2.11 Best use of the existing runway and the development of accompanying infrastructure was supported by Thomas Cook Airlines, the CBI and the Vale of Glamorgan Council. A runway extension was supported by the TUC and by Cardiff International Airport, which supported a modest extension of 250 metres to enhance the airport's capability for long haul scheduled passenger operations.
- 2.12 Nineteen respondents called for improved road access links and 19 for heavy rail access. Support for heavy rail schemes mainly referred to the proposed link to Rhoose Station on the Vale of Glamorgan line which was to be reopened for passenger services and which is being taken forward by the local councils in collaboration with the Welsh Assembly Government, the Strategic Rail Authority and Network Rail. Cardiff International Airport called for improved access from the city and the motorway network but was not prescriptive about specific routes, and noted that it was committed to supporting a bus connection to Rhoose Station. The South East Wales Transportation Forum thought that existing links were inadequate and that, while the new station and transport interchange at Rhoose were welcomed, a dedicated light rail link would be the most desirable option. The Welsh TUC wished to see a new dual carriageway directly linked to the M4 motorway and welcomed the fact that the Welsh Assembly Government was developing plans for rail links into the airport.

## Other Airports

- 2.13 Table 8 also shows some support for growth at other airports in Wales, with most references to Haverfordwest and Valley. Of those respondents that commented on the smaller airports, the most frequently selected combination of airports was all of them. Most of these respondents were Welsh national organisations, but local Political Stakeholders (local authorities and MPs) referred to airports in their locations. In addition to those noted in Table 8, Cardiff International Airport suggested a new small airport near Aberystwyth and the Welsh Liberal Democrats referred to Welshpool. There were very few responses about specific forms of development at the smaller airports.
- 2.14 Opposition to development at smaller airports was noted for Hawarden and Swansea by The Woodland Trust and to St Athan by the Institute of Welsh Affairs, which said that this would damage Cardiff's ability to attract aircraft maintenance rather more than any benefit stemming from growth at St Athan. The issue of domestic air services for Wales using all of these airports is dealt with in a later section of this report. The 13 respondents categorised as 'Other' in Table 8 included 3 that referred to airports outside Wales, also dealt with later, and 5 that referred to a new airport in the Newport/Severnside area.
- 2.15 The consultation document made only brief reference to Severnside but a number of respondents referred to various proposals, and substantial documents in support of their proposals were submitted by some proponents. Severnside International Airport Ltd. proposed a new airport on a man-made island between the M4 bridge and Newport to serve a wide catchment area including England west of Reading and the South Midlands. Cardiff and Bristol Airports would be restricted or closed. Newairport Ltd. proposed a site at Llanwern to replace Cardiff and Bristol.
- 2.16 The South East Wales Economic Forum supported consideration being given to developing major intercontinental airport facilities in the region. The Institute of Welsh Affairs noted a disparity between the Wales consultation document's dismissal of the Severnside proposal and the consideration of a new Bristol airport given in the South West consultation document, and called for a study of the combined air transport needs of the South West and South Wales. The Royal Town Planning Institute in Wales did not think that there was an immediate case for development of a new airport in South East Wales. Huw Edwards, MP for Monmouth, did not believe that a new international airport in south east Wales would solve the future of aviation in the South East of England, and had consistently opposed the plans. The Gwent Wildlife Trust expressed serious concerns about such a project and the Countryside Council for Wales pointed out the environmentally sensitive nature of the Gwent Levels area.

**Question 3: If it [your preferred strategy] does not, does Wales need all of its current complement of airports, and are there particular airports whose development should be constrained and why?**

- 2.17 3 respondents said that Wales does not need all of its current airports and 8 referred to specific airports that should be constrained. The Countryside Council for Wales expressed concern about possible routes for new road access to Cardiff and environmentally sensitive sites near Swansea and Valley. RSPB Cymru expressed concern about sites near to Hawarden Airport and would look carefully at any proposals for Swansea.

**Question 4: If you are of the view that Wales should seek to accommodate its own demand (and attract demand from the South West, Midlands and the North of England) how might this best be achieved:**

- **Can the existing airports be developed to provide sufficient capacity?**

**Table 11 – How can Demand be Accommodated within Wales?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Improve surface access to main airports	1	2	2		1	6
Feeder connections to Cardiff from rest of Wales		2		1	1	4
Additional capacity at main airports	2	1				3
Construction of new airports	2				1	3
Constraints on airports in the South East		1	1	1		3
Development of smaller airports				2		2
Other		2		1		3
<b>Total Responses</b>	<b>5</b>	<b>8</b>	<b>3</b>	<b>5</b>	<b>3</b>	<b>24</b>
No Response	10	6	10	9	11	46
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

2.18 Table 11 shows respondents' views on the first part of Question 4. Improving surface access was the most quoted method by which Wales could accommodate more of its own demand, for example from the Welsh TUC. 4 respondents supported feeder connections to Cardiff, including the Institute for Welsh Affairs and the Welsh Liberal Democrats. This issue is also covered when considering domestic services for Wales in a later section of this report. Various other measures were suggested by the remaining respondents, including the construction of new airports by the proponents of those schemes.

2.19 27 out of 33 respondents to the second part of the question said that the existing airports could be developed to provide sufficient capacity and another 3 said possibly.

**Question 5: Is it important that demand should be met direct from Wales, or can the needs of the region be met by passengers interlining at hubs elsewhere in the UK or in continental Europe?**

**Table 12 – Can Demand from Wales be met Elsewhere?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Important demand is met direct from Wales	5	6	1	2	3	17
Can be met by passengers interlining	2	3	3	1	2	11
Can be met at neighbouring regions airports		1		1		2
Not important				2		2
Other	1			1		2
<b>Total Responses</b>	<b>8</b>	<b>10</b>	<b>4</b>	<b>7</b>	<b>5</b>	<b>34</b>
No Response	7	4	9	7	9	36
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

2.20 Table 12 shows the respondents to Question 5. There did not appear to be a geographical relationship to these answers, with respondents from all parts of Wales giving the first two answers in Table 12. The Wales Tourist Board noted that the need to meet demand locally was important if Wales was to be able to benefit from the development of short leisure breaks close to the arrival airport. The Welsh Consumer Council thought that reliance on airports in the South East of England had detrimental consequences in terms of cost, travel time, convenience and environmental damage from traffic pollution. The South West Wales Integrated Transport Consortium proposed that the best solution for connecting Wales directly to Heathrow by high-speed line was from the Great Western Main Line. Flintshire County Council commented that Manchester and Liverpool Airports could serve North Wales provided that there was sustainable surface access.

2.21 In the next section respondents' views on competition versus complementary development in Wales are described.

## Competition v Complementary Development

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### Introduction

- 3.1 This section considers if there is a role for the complementary development of Wales' airports, or if a competitive environment is better for the development of Welsh air services. It reflects respondents' thinking on opportunities for greater partnership between the aviation industry and the public sector, and the right role for the Welsh Assembly Government.
- 3.2 The section draws on respondents' commentary on the matters contained in questions 1 and 2 under the heading Competition v Complementary Development in Section 8.3 of the Wales consultation document.

### Synopsis of Relevant Part of the Wales consultation document

- 3.3 The Government needs to consider how the best interests of a region or country within the UK should be served by the airports within it or adjacent to it.
- 3.4 Both competition and complementary development may have a role; and there may be opportunities for partnership between the aviation industry and the public sector to encourage access to air services.

### Summary of Findings

- 3.5 There were only 26 respondents to this section out of the total sample of 70. All that responded to the question on partnerships between airports, airlines and the public sector agreed that there were greater opportunities, while there was roughly equal preference for competition and complementary development, with the Aviation Industry in particular preferring competition.

## Respondents' Views

**Question 1: Are there opportunities for greater partnerships between airports, airlines and the public sector stakeholders to foster the wider economic interests of Wales?**

**Question 2: Is competition always preferable to complementary development? Do you think there are any circumstances in which the latter approach would bring wider economic or other benefits?**

3.6 In answer to Question 1, all 24 respondents, from across all stakeholder groups, said that there were opportunities for greater partnerships.

**Table 13 – Is Competition Always Preferable to Complementary Development?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Yes	2					2
Usually	2					2
Sometimes (not always)	1	3		1		5
No		1	2	1	2	6
<b>Total Responses</b>	<b>5</b>	<b>4</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>15</b>
No Response	10	10	11	12	12	55
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

3.7 Table 13 shows respondents' views on the first part of Question 2. Although there were few respondents, a pattern was evident in the answers to this question, with the Aviation Industry broadly supportive of competition, whereas other groups were less convinced. 3 Economic Interests respondents gave measured support to the competition view, but virtually all other respondents were of the alternate view that complementary development was preferable.

3.8 Thirteen respondents answered the last part of Question 2, 11 of which, across all groups, said that there were circumstances where complementary development would bring wider benefits, and the other 2 said that this would be the case sometimes. This contrasts with the 6 noted in Table 13 as preferring complementary development, but may reflect the different wording of the second part of the question.

3.9 Cardiff International Airport noted that, while competition was usually preferable, there was in effect no competition in Wales, but that leakage to Bristol would decline as Cardiff attracted more services. It also argued that there was potential for the complementary development of Cardiff Airport and Welsh regional airports. Flintshire County Council believed that complementary development would provide the opportunities to develop a more integrated package of infrastructure and service improvement together with economic and social regeneration.

3.10 In the next section respondents' views on The Economic Benefits of Air Travel to Wales are described.

## Economic Benefits

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### Introduction

- 4.1 This section examines the degree to which Wales's economic well-being is assisted by the aviation industry and the importance or otherwise that respondents attach to the development of more direct services. It considers which aspects of the economy are most affected by aviation, with a particular look at the possible negative effects on the domestic tourism market, and identifies opportunities to encourage certain sectors of the aviation industry. It reflects on the implications for direct services of a relaxation of 5th Freedoms from Wales's airports.
- 4.2 The section draws on respondents' commentary on the matters contained in Questions 1 to 12 under the heading Economic Benefits in Section 8.3 of the Wales consultation document and also answers to Question 1 under the heading Aircraft Maintenance.

### Synopsis of Relevant Part of the Wales consultation document

- 4.3 The Wales consultation document noted the particular success of the aerospace industry in Wales, as well as the wider economic benefits and the relationship with inward investment. It presented a range of employment projections, varying with both the National Policy Scenario and also a productivity assumption.

### Summary of Findings

- 4.4 Forty nine out of the 70 total respondents referred to economic benefits.
- 4.5 A number of clear and strong messages emerged from the responses to this section. Most thought that aviation's contribution to the Welsh economy was important, while only a few said it was not or that its importance was exaggerated. The two main areas where the benefits could be captured were facilitating domestic and international trade and commerce and creating direct employment. However, there were few respondents that noted the barriers to the jobless in taking advantage of opportunities, most focusing on excessive travel time to the airport.
- 4.6 There was strong agreement that the Welsh Assembly Government and the Welsh Development Agency should support and facilitate the achievement of the benefits. Support for air services and funding for infrastructure were the mechanisms most often suggested as being beneficial.
- 4.7 Respondents had a clear view that improved air links would help increase inbound tourism and reduce reliance on London as the primary port of entry, with support for direct services again mentioned most frequently.
- 4.8 Respondents felt that airports should be a focus for economic clusters. On air cargo, only a limited number of respondents expressed a view, but all that did said that it was important to the economic objectives of Wales and most said that guaranteed night-time slots for airfreight should be contingent on noise/emissions standards. There was a clear view that there would be scope for growing aircraft maintenance, and various suggestions were made as to how to maximise its potential and the proposed aerospace park at St Athan was considered to be the way forward.

4.9 Business aviation was considered to be either very or quite important to the economic objectives of Wales. It was important for the UK to remain the aviation gateway to Europe. There were few respondents on the question of relaxing the UK's policy on 5th Freedoms, but opinion was mixed.

## Respondents Views

4.10 The opening question seeks to establish whether respondents believed aviation to be of importance to the economic prosperity of Wales.

**Question 1: How important is the contribution of aviation to the Welsh economy? How and where can the benefits be captured?**

**Table 14 – How Important is Aviation to Wales' Economy?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Important	11	12	3	8	4	<b>38</b>
Not important			1			<b>1</b>
Importance exaggerated					4	<b>4</b>
<b>Total Responses</b>	<b>11</b>	<b>12</b>	<b>4</b>	<b>8</b>	<b>8</b>	<b>43</b>
No Response	4	2	9	6	6	<b>27</b>
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

4.11 Table 14 shows respondents' answers to the first part of Question 1. The overwhelming view, across all groups, was that aviation was important to the Welsh economy. The one response which was categorised as 'Not important' was from the Rail Passengers Council, which estimated it to be of minor importance, while 4 Wider Stakeholder Groups said the importance was exaggerated (Council for National Parks, Countryside Council for Wales, the National Trust and the Wildlife Trust).

4.12 There was a more limited response to the second part of the question. Facilitating trade and commerce, which included the facilitation of economic clusters and supplying goods and services to the aviation industry, and employment creation, were the benefits most noted. Cardiff International Airport considered that aviation was a fundamental driver of the success of the Welsh economy and that Wales was a centre of excellence for the aerospace industry. The Welsh Liberal Democrats indicated that improved links to the rest of the UK and Ireland would considerably benefit the Welsh economy and improve Wales' economic presence in Europe.

**Question 2: What barriers need to be addressed if the jobless on benefit, particularly in low employment areas, are to take advantage of the employment opportunities that arise from growth in aviation and airport services? Are there any solutions?**

4.13 There were only 12 respondents to the first part of Question 2, 9 of which mentioned the travel cost or time of getting to the airport and 5 that referred to the low or inappropriate skills base. There were 14 respondents to the second part of the question, 7 of which referred to improving public transport and 4 that referred to skills training.

**Question 3: What systems or processes would help improve links between aviation industry employers and intermediaries assisting the jobless and why?**

4.14 There were only 6 respondents to this question. The Campaign for the Protection of Rural Wales thought it would be helpful to set up or augment partnerships between aviation industry employers and organisations that assist people to find jobs. The Isle of Anglesey County Council believed that local authorities have a key role to play in developing dialogue between private sector employers and agencies working with unemployed people.

**Question 4: What should be the role of the Welsh Assembly Government and Welsh Development Agency in achieving this and what should be their priorities? What mechanisms are available to them to support any approach that is agreed?**

4.15 The response to this question was clear and unequivocal. There were 21 respondents to the first part of Question 4, of which 16 suggested that the role of the Welsh Assembly Government and the Welsh Development Agency should be to support and facilitate.

**Table 15 – What Support Methods Should the Welsh Assembly Government and Welsh Development Agency Give?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Support for air services	1	5	1	3	1	11
Funding for infrastructure (regeneration budgets or structural funds)	2	4	1	3	1	11
Facilitating international business/tourism links		2		2		4
Other	2	2		2	2	8
<b>Total Answers</b>	<b>5</b>	<b>13</b>	<b>2</b>	<b>10</b>	<b>4</b>	<b>34</b>
<b>Total Responses</b>	<b>2</b>	<b>6</b>	<b>1</b>	<b>5</b>	<b>2</b>	<b>16</b>
No Response	13	8	12	9	12	54
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

4.16 Table 15 shows respondents' answers to the second part of Question 4. Mechanisms most often cited were support for air services and funding for infrastructure. The Wales Tourist Board suggested that domestic air services would be worthy of public subsidy and the GMB thought that domestic services may be worthy of a trial and would need funding in the start up period. Ceredigion County Council called for the Welsh Assembly Government to give financial support for the development of airport infrastructure in preference to road and rail for reasons of added value. The Vale of Glamorgan Council suggested that the Welsh Assembly Government should also consider subsidising a frequent bus service from Cardiff International Airport to the city and giving support to a high-speed direct rail link to the London airports.

**Question 5: Would improved air links help to:**

- **increase inbound tourism to Wales?**
- **reduce reliance upon London as the primary point of interest for airborne inbound tourists?**

**Question 6: If you think it would, what measures could Government, regional tourism interests and the aviation industry take to facilitate this?**

4.17 Strong messages also emerged from the respondents to these questions. 25 out of 30 thought that improved air links would help inbound tourism and 16 out of 20 thought they would reduce reliance on London, with responses coming from all stakeholder groups. The most favoured measure noted in response to Question 6 was support for direct services. The Wales Tourist Board said that improved air links would enable Cardiff to compete for short break tourists. A dissenting voice came from Sustrans Cymru, which noted a concern about the adverse balance of tourism resulting from air travel.

4.18 In addition to the potential for air services to facilitate tourism, airports can also act as catalysts for economic activity within a region. Question 7 sought to establish whether respondents believed airports within Wales could act as a focus for economic clusters.

**Question 7: Is there a role for airports in Wales to act as a focus for economic clusters and should clusters be encouraged?**

- 4.19 Seventeen out of 18 respondents agreed with this question. Flintshire County Council commented that aviation can be an 'economic mainspring' for a solid economy and would encourage economic clusters at Hawarden and Deeside. Only the Rail Passengers Council disagreed, saying that airports should be located away from residential areas and the development of economic clusters near them would only increase the demand for travel.
- 4.20 There are also specific elements of the aviation industry that could make a contribution to Wales' economic aims. The first of these is air cargo.

**Question 8: How important are air cargo services for the economic objectives of Wales? What measures are needed to give airfreight and mail operators confidence to plan their long-term investment in airport facilities? Should night-time slots be guaranteed for airfreight and mail? Should such guarantees be contingent upon the noise/emissions standards of the aircraft being operated?**

- 4.21 Thirteen out of 14 respondents to the first part of Question 8 thought that airfreight was important to the Welsh economy. 6 out of 11 respondents to the second part said that airport space should be provided for mail/freight operators. 8 out of 11 respondents to the third part said that night-time slots should be guaranteed but 9 out of 10 respondents to the fourth part said they should be contingent on noise and air quality standards. The one dissenting voice to the fourth part of the question came from the British Cargo Airline Alliance. The Freight Transport Association believed that the key issue for airfreight users was to be able to attract wide bodied scheduled passenger services.
- 4.22 Other sectors that could contribute include maintenance, ground and cabin crew training.

**Question 9: Is there scope for capturing more of the UK and global aircraft maintenance market at Welsh airports and how might this best be achieved? What would be the advantages and disadvantages of encouraging growth of this sector?**

- 4.23 Only 1 out of 19 respondents to the first part of Question 9 did not agree that there was scope for capturing more maintenance, but there was a limited response on how this might be achieved and what the advantages might be. Further questions about aircraft maintenance and St Athan were asked in a later section of the Wales consultation document, but in this report this question is covered in the next paragraph.

**Aircraft Maintenance Question 1: Cardiff already serves as an important focus for aircraft maintenance and related activities; how can this sector's potential be maximised throughout Wales. Is the proposed Aerospace Park at RAF St Athan the way forward, or are there other alternatives.**

**Table 16 – How Should the Potential of Aircraft Maintenance be Maximised?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Establish training and development partnership	1		1	1		3
Joint marketing of region		1			1	2
Public sector fiscal incentives				1		1
Other forms of Public Private Co-Operation		1				1
Other	3			1	2	6
<b>Total Responses</b>	<b>4</b>	<b>2</b>	<b>1</b>	<b>3</b>	<b>3</b>	<b>13</b>
No Response	11	12	12	11	11	57
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

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- 4.24 Table 16 show respondents' answers to the first part of Aircraft Maintenance Question 1. 8 out of 11 respondents to the second part of the question agreed that the proposed aerospace park at St Athan was the way forward and the other 3 said probably.
- 4.25 British Airways welcomed the establishment of vocational centres around established maintenance clusters in Wales and Scotland. Thomas Cook Airlines said that the proposal for an aerospace park at St Athan would appear to have considerable merits for both the region and potential customers. Flintshire County Council suggested that the strategic development at this site and others for example DARA in Deeside, should be considered to complement any development at airports within Wales. The Royal Town Planning Institute for Wales noted that the emerging maintenance cluster around Cardiff and St Athan was seen as being a blueprint for developing a world class centre of excellence.
- 4.26 Another sector of the industry that may bring wider benefits to Wales is business aviation.

**Question 10: How important is business aviation for inward investment and other economic objectives of Wales? If business aviation cannot be accommodated at the major airports, how should the needs of this sector be met?**

- 4.27 Twelve out of 15 respondents said that business aviation was important. There were only 5 responses to the second part of the question, all saying that business aviation's needs could be met at secondary airports.

**Question 11: How important is it for your business/organisation that the UK remains the aviation Gateway to Europe?**

- 4.28 Twelve out of 15 respondents, mainly the Aviation Industry and Economic Interests groups, said that it was very important that the UK remains the aviation Gateway to Europe. The CBI contended that the UK must retain a globally competitive hub in order to maintain the level of access to international markets business required and capture the wider benefits good international air links provided.
- 4.29 International air service agreements can shape the development of aviation within a country, and this issue may have relevance to Wales. Stakeholders were asked to consider this.

**Question 12: Would the relaxation of the UK's current policy in relation to international air service agreements to allow unlimited 5<sup>th</sup> Freedoms from regional airports, materially affect the ability of Wales's airport to capture new services?**

- 4.30 Only 9 respondents answered Question 12, with divided opinion being expressed. 2 favoured relaxation, 3 more favoured relaxation at large airports and 4 were against relaxation. The Welsh Consumer Council argued for unilateral 5th Freedom rights from regional airports. Thomas Cook Airlines believed that the Government's already very liberal policy provided a proper balance between the needs of consumers and the legitimate interests of UK airlines.
- 4.31 In the next section respondents' views on Social Inclusion in Wales are described.

## Social Inclusion

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### Introduction

- 5.1 This section captures respondents' views about the extent to which the development of aviation could help to address deprivation and social exclusion within Wales. It looks, in particular, at the ways in which the jobless and less economically buoyant parts of Wales might benefit from the creation of employment opportunities.
- 5.2 The section draws on respondents' commentary on the matters contained in Questions 1 and 2 under the heading Social Inclusion in Section 8.3 of the Wales consultation document.

### Synopsis of Relevant Part of the Wales consultation document

- 5.3 The consultation document noted how the presence of an airport could affect the regeneration of deprived areas, with West Wales and the Valleys having EU Objective One status.

### Summary of Findings

- 5.4 A limited response was received to questions in this section, with only 26 out of the 70 total respondents answering at least one question. Respondents to the general question of whether aviation could help to address deprivation and social exclusion were all positive, mainly because it could promote employment growth, although there were few suggestions on specific measures to achieve this.

## Respondents' Views

- 5.5 Question 1 seeks to establish whether respondents felt growth in aviation can promote social inclusion and help overcome deprivation. If aviation is to help address these issues, barriers need to be overcome for the jobless to take advantage of new opportunities.

**Question 1: Can the development of aviation within Wales help to address deprivation and social exclusion?**

**Question 2: What measures are needed to ensure the benefits of growth in the air transport industry are transmitted to less economically successful areas of Wales?**

- 5.6 Twenty one of the 22 respondents to Question 1 said that aviation could help to address deprivation in Wales because it promoted economic growth generally and the other 1 said that it could under some circumstances. There were 12 respondents to the second question, with improved public transport mentioned by 6 and various forms of partnership to cover training, marketing and other issues mentioned by 5.
- 5.7 The Wales TUC, under the heading of links to London airports, noted that presently Wales holds little attraction for inward investment because of a perception about travel difficulties and that this could jeopardise the benefits of Objective One funding. Flintshire County Council thought that high-speed rail was more socially inclusive than air services.
- 5.8 The North Wales Economic Forum considered that the major benefit of aviation addressing social inclusion was the creation of new jobs and more remunerative employment, but the primary difficulty lies in providing access from areas of high unemployment to the job opportunities. The South East Wales Economic Forum noted that there was a high proportion of deprived areas and the jobs created through a major airport development would have a major impact on regeneration. The Campaign for the Protection of Rural Wales wanted public transport to be improved to enable jobless people to reach the workplace in a sustainable fashion. The Institute of Welsh Affairs said that the provision of internal air services would assist in spreading the beneficial effects and opportunities to introduce aviation support services into deprived areas.
- 5.9 In the next section respondents' views on Environmental Impacts in Wales are described.

## Environmental Impacts

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<a href="#">Domestic Air Services for Wales</a>
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### Introduction

- 6.1 This section is about the environmental implications of growth in aviation across the UK in general, and for Wales in particular, resulting from the various national policy scenarios and the development options at Welsh airports. It identifies any environmental impacts of growth that are thought to be both unacceptable and incapable of amelioration. It looks at the issue of enforceable environmental targets as a corollary of growth, and whether or not it would be advantageous to remove airports from the Green Belt.
- 6.2 The section draws on respondents' commentary on the matters contained in Questions 1 to 4 under the heading Environmental Impacts in Section 8.3 of the consultation document.

### Synopsis of Relevant Part of the Wales consultation document

- 6.3 The Wales consultation document reviewed impacts on people and the natural and built environment, looking specifically at noise, air quality, ecology, heritage and greenhouse gases and climate change.

### Summary of Findings

- 6.4 Thirty nine out of 70 respondents answered at least one question in this section. In terms of unacceptable environmental impacts, the most frequently mentioned were noise, air quality, land and property take and climate change. A majority of respondents said that the dis-benefits could be adequately controlled or mitigated.
- 6.5 Most respondents agreed that scenarios that kept pace with demand could be supported if they carried enforceable, challenging targets for environmental improvement.
- 6.6 Respondents' views on the case for reviewing Green Belt boundaries were equally balanced in favour and against.

## Respondents' Views

6.7 This section begins by analysing respondents' views on the environmental impacts of the National Policy Scenarios, particularly where it may be felt that these are unacceptable. In order to provide a logical and clear presentation of the responses received, questions 1 and 2 are analysed together.

**Question 1: Are there any environmental impacts from the National Policy Scenarios or infrastructure projects appraised in this document (the consultation document) which you regard as unacceptable?**

**Question 2: Could these environmental dis-benefits be controlled or mitigated to reduce them to acceptable levels? Do you have any views on this in respect of:**

- noise (day-time and night-time);
- air quality (air traffic and surface access impacts);
- land and property take (residential, agricultural, green belt, landscape);
- biodiversity;
- climate change;
- other environmental impact;

**either in general, or at particular Welsh airports.**

6.8 The number of respondents that said that the impacts from the National Policy Scenarios were 'unacceptable', in those precise terms, was small. The bulk of respondents identified specific environmental impacts, described the extent to which they were concerned or otherwise by those impacts and then, depending on that level of concern, whether or not those impacts might be mitigated or controlled and how. In order to accommodate the terminology used in Question 1, and to ensure that the seriousness of respondents' concerns were captured, those respondents that expressed great concern about a particular impact or impacts were described as finding those impacts 'unacceptable'.

6.9 Respondents' answers to Questions 1 and 2 have been correlated; firstly, to get an overall view of whether respondents felt environmental impacts were of concern per se; second, to establish a ranking of impacts of concern; and, third, to identify for each individual impact respondents' views on the extent to which they would be capable of effective mitigation.

**Table 17 – Are there any Environmental Impacts that you Regard as Unacceptable, and to What Extent can these be Mitigated?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Unacceptable impacts - cannot be mitigated					3	3
Unacceptable impacts - mitigation maybe possible	1		1	1	3	6
Unacceptable impacts - no comment on mitigation			1	1	3	5
Unacceptable impacts - can be mitigated	1	2		1		4
No unacceptable impacts highlighted - can be mitigated	8	2	1	1	2	14
<b>Total Responses</b>	<b>10</b>	<b>4</b>	<b>3</b>	<b>4</b>	<b>11</b>	<b>32</b>
No Response	5	10	10	10	3	38
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

6.10 Table 17 shows respondents' overall views on the acceptability of environmental impacts and whether their effects can be controlled or mitigated. 18 respondents indicated concern about impacts, of which 3 said that the effects could not be controlled or mitigated.

6.11 The 3 respondents that said that impacts were unacceptable and could not be controlled or mitigated were the Environmental Law Foundation, RSPB Cymru and The Woodland Trust.

**Table 18 – Are there any Specific Environmental Impacts that you Regard as Unacceptable, and to What Extent can these be Mitigated?**

	Impacts can be mitigated	Impacts identified - no substantive comment on mitigation	Impacts cannot be mitigated	Sub-Total
Noise	20	3		23
Air Quality	17	3	2	22
Land and Property Take	11	4	3	18
Biodiversity	8	2	3	13
Climate Change	9	7	1	17
Other Environmental Impacts	9	12		21
<b>Total Answers</b>	<b>74</b>	<b>31</b>	<b>9</b>	<b>114</b>

6.12 Table 18 shows respondents' views on specific impacts. Noise and air quality were the issues of most concern, followed by land and property take and climate change. Many respondents expressed concern about noise and air quality even though the consultation document indicated that noise impacts at Cardiff associated with growth would be minor and the air quality screening tests would be met. The 'Other' category included a range of other impacts on the natural and built environment as well as some comments about non specific impacts. As well as expressing concern about particular impacts, many noted issues at particular sites.

6.13 The Vale of Glamorgan Council referred to a number of complaints about noise received from residents around Cardiff Airport and called for monitoring and study of air and noise pollution. The Countryside Council for Wales noted the implications on biodiversity of the proposed new access road to Cardiff Airport and listed the designated areas within 5km of various airport sites as well as a particular concern about climate change and the ability to meet long-term targets for CO<sub>2</sub> emissions.

6.14 The National Trust believed that impacts on the local environment from emissions would be potentially very significant, and also related tourism to environmental quality including tranquillity. The Woodland Trust noted that the expansion of Swansea and Hawarden Airports or a new airport at Aberystwyth would have unacceptable environmental costs.

6.15 Severnside International Airport Ltd. maintained that there would be no net diminution of mudflats with their proposal. Gwent Wildlife Trust noted the conservation designations of the area around the proposed site for a new airport at Severnside and the catastrophic effects from the building phase. Thomas Cook Airlines noted that developing airports at green field sites was less preferable to developing at existing airports.

6.16 Having established the views of respondents with regard to areas of potential environmental impact, and where these could be mitigated, the following question addresses the more specific issue of whether there would be support for policy scenarios that allow increases in capacity providing they are accompanied by targets for environmental improvement.

**Question 3: Would you support the scenarios to keep pace with consumer demand if they carried with them enforceable targets for environmental improvement (e.g. air quality, noise, public transport mode split, energy savings and waste reduction)?**

6.17 Of 24 respondents to this question, 18 agreed, including the Vale of Glamorgan Council. Of the 5 that disagreed, 4 were Wider Stakeholder Groups. New airPort Ltd. believed that targets were a second best option and moveable and did not address the core issue, which was the current asymmetrical provision of airports in the UK, by which was meant the concentration of airport capacity in the South East of England.

**Question 4: Is there a case for reviewing Green Belt boundaries as they affect airports in the light of any of the scenarios. What would be the advantages and disadvantages? Should airports be removed from the Green Belt altogether?**

6.18 Six of out 12 respondents to the first part of this question agreed that there was a case for reviewing Green Belt boundaries and 6 disagreed. As the Countryside Council for Wales noted, there was no Green Belt in Wales but a number of respondents answered either in terms of the position in the rest of the UK or in terms of more general land designations around airports. Thomas Cook Airlines said that the case for reviewing Green Belt boundaries is dependent on a proper balance between the economic, social and environmental factors involved. The Campaign for the Protection of Rural Wales proposed that Green Belt erosion must be strenuously resisted unless there were circumstances in the public interest.

6.19 In the next section respondents' views on Surface Access in Wales are described.

## Surface Access

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Regional Access
Domestic Air Services for Wales
Aviation Strategy for Wales

### Introduction

- 7.1 This section identifies the surface access schemes and other measures that would be needed to support any proposals to expand Wales's airports. It considers whether or not such schemes and measures ought to be a pre-condition of growth. It looks at priorities for, and sources of, funding.
- 7.2 The section draws on respondents' commentary on the matters contained in Questions 1 to 3 under the heading Surface Access in Section 8.3 of the Wales consultation document.

### Synopsis of Relevant Part of the Wales consultation document

- 7.3 The Wales consultation document considered Cardiff International Airport in terms of its existing road, rail, bus/coach and car parking provision. For the future scenarios, indications were given of the roads that might be congested, car parking demand, and potential public transport options. There were also references to surface access to other regions, particularly to the South East and its airports and Manchester and this is covered in the section on Regional Access later in this report.

### Summary of Findings

- 7.4 Forty seven out of the 70 respondents answered at least one question in this section. On public transport expenditure, most of the respondents that answered said that the focus should be on improving both local and inter-regional access, with the main reason being that this would enable wider regional use of the region's airports. All respondents to the question on surface access constraints said that they should be addressed, and all but one stated that these projects should be given a high priority.
- 7.5 In responding to specific schemes for Cardiff International Airport, there was most support for a new or improved rail link, followed by improved road access and improved bus/coach services.
- 7.6 There was a mix of views on funding, some called for public funding and others said it should be a mix of public and private funding.
- 7.7 Public transport quality improvements were seen by most respondents as the best way to increase mode share.

## Respondent's Views

**Question 1: Should the focus of any public expenditure which may be available to help improve surface access to Welsh airports be on improving local or inter-regional access or both, and why?**

**Table 19 – Should Public Expenditure on Surface Access be on Links within Wales or to Other Parts of the UK?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Local			1		2	3
Inter-regional	1	1		3		5
Both	5	8	5	3	1	22
<b>Total Responses</b>	<b>6</b>	<b>9</b>	<b>6</b>	<b>6</b>	<b>3</b>	<b>30</b>
No Response	9	5	7	8	11	40
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

**Table 20 – Reasons for Public Expenditure**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Maximise local use of airport		2		1		3
Maximise wider regional use of airport	2	3	3	2	1	11
Overcome local congestion/secondary benefits	2	1				3
Rail/Air substitution		1	3		1	5
Other	1	2		1		4
<b>Total Responses</b>	<b>5</b>	<b>9</b>	<b>6</b>	<b>4</b>	<b>2</b>	<b>26</b>
No Response	10	5	7	10	12	44
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

7.8 Table 19 shows respondents views on the first part of Question 1 and Table 20 shows answers to the second part. Most respondents said that public expenditure should be on both local and inter-regional access, and the most frequently cited reason was to maximise the wider regional use of the airport. Respondents supporting this view included the Welsh Local Government Association and Cardiff International Airport.

**Question 2: Under many of the National Policy Scenarios there will be a large increase in the number of passengers using the Wales airports over our forecasting period. Our analysis indicates this will place considerable strain on surface access provision, particularly key road links in a number of places:**

- Should these surface access constraints be addressed?
- Which schemes outlined in the document do you consider are the key ones for improving access to the region's airports and what priority should they be given relative to other projects? Which do you think should not be taken forward?
- Are there any surface access schemes identified in the analysis that you support or oppose? Please give your reasons.
- Are there any surface access improvements, which should be regarded as pre-conditions before new capacity can take place at airports within the study area?
- How should these surface access improvements be funded?

7.9 All 28 respondents to this question agreed that surface access constraints should be addressed.

**Table 21 – Which Key Transport Schemes Should be Taken Forward? - General**

GENERAL							
	Key Schemes						Preconditions
	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total	
New or improved heavy rail access to airports	5	6	4	3	1	19	6
New or improved road access to airports	4	7	2	2		15	2
New or improved bus/coach access to airports	3	4	2	1		10	2
New or improved light rail access to airports	1	1	3	1		6	1
<b>Total Answers</b>	13	18	11	7	1	50	11
<b>Total Responses</b>	5	8	5	4	1	23	
No Response	10	6	8	10	13	47	
<b>Total Sample</b>	15	14	13	14	14	70	

**Table 22 – Which Key Transport Schemes Should be Taken Forward? - Cardiff**

CARDIFF							
	Key Schemes						Preconditions
	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total	
New/improved rail links to airport	2	8	5	3	2	20	4
Improved road public transport links (minibus/coach/bus)	1	6	5	4	1	17	2
Improvements to road network	2	4	2	2	1	11	2
New access from M4 J34	1	3	1		1	6	1
Remote check-in		1	1		1	3	1
Additional car parking					1	1	
Other		2	2			4	1
<b>Total Answers</b>	6	24	16	9	7	62	11
<b>Total Responses</b>	2	8	7	4	3	24	
No Response	13	6	6	10	11	46	
<b>Total Sample</b>	15	14	13	14	14	70	

- 7.10 Tables 21 and 22 show which schemes respondents said were the key ones and which should be pre-conditions. Rail and road based public transport schemes to Cardiff received most support and virtually no opposition. Most respondents that referred to a rail link meant the proposed bus link to Rhoose Station on the Vale of Glamorgan line which was to be reopened for passenger services and which is being taken forward by the local councils in collaboration with the Welsh Assembly Government, the Strategic Rail Authority and Network Rail. Improved road access and a new access from the M4 Junction 34 received some support, the latter also being opposed by one respondent. There were a limited number of respondents suggesting pre-conditions, with a new or improved rail link to Cardiff most mentioned. The Government was most often mentioned as the source of funds.
- 7.11 Cardiff International Airport indicated that a new airport access road was required and road and public transport improvements were supported by the South East Wales Transportation Forum. The Welsh branch of the National Travelwise Association proposed that road and rail access to Cardiff International Airport from both east and west should be improved. The Royal Institute of Chartered Surveyors supported improving and upgrading existing roads rather than a new road from the M4. Support for improved road access came from the Institute for Welsh Affairs and the Wales TUC. The Welsh Consumer Council called for a rail station fully integrated with the airport, while the Welsh Liberal Democrats suggested a high-speed rail link to the city centre. Improvements to both road and rail access were supported by the South West Wales Integrated Transport Consortium and the South East Wales Transportation Forum. Sustrans Cymru called for innovative non car solutions including safe routes for pedestrians and cyclists, as well as a network of buses and high quality coaches.
- 7.12 On funding, the Road Haulage Association suggested that airports and airlines should contribute to the funding of upgrading access roads, rather than them being funded purely from the roads budget. The South West Wales Integrated Transport Consortium recommended seeking the active support of the Welsh Assembly Government to finance the improvement of the airport link roads from the A48 and M4 to trunk road standard and, with additional support from the SRA, to improve rail connections from the Great Western Main Line to the Vale of Glamorgan line at Bridgend and enable through services to Rhoose Station from the west.

**Question 3: How might the share of public transport access to airports be increased?**

**Table 23 – How Might the Share of Public Transport Access to Airports be Increased?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Improving public transport quality/reducing fares	5	4	2		2	13
Enforceable % targets for public transport use		1	1		1	3
Discouraging use of private car	1		2			3
Public funding - public transport operation	1				1	2
Other partnerships			1			1
Other	5		3			8
<b>Total Answers</b>	<b>12</b>	<b>5</b>	<b>9</b>		<b>4</b>	<b>30</b>
<b>Total Responses</b>	<b>6</b>	<b>4</b>	<b>4</b>		<b>3</b>	<b>17</b>
No Response	9	10	9	14	11	53
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

- 7.13 Improving quality and/or reduced fares was seen as the best means of improving public transport market share by 13 respondents. Cardiff International Airport noted that the degree of attractiveness of the bus service would, to a great extent, be dependant upon the standard of the road access to Cardiff. Sustrans Cymru suggested that a network of buses, minibuses, shared taxis, high quality coaches and guided busway services would be appropriate.
- 7.14 In the next section, respondents' views on access to London and other regions of the UK from Wales are described.

## Regional Access

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### Introduction

- 8.1 This section reflects the importance, or otherwise, that respondents attach to developing direct air services from Wales, and the extent to which they envisage Wales continuing to rely upon airports in the South East of England for global connectivity. It looks at surface access to airports outside Wales, in particular high-speed rail and considers if a Cardiff to London City air service could be made viable.
- 8.2 The section draws on respondents' commentary on the matters contained in Questions 1 to 3 under the heading Access to London in Section 8.3 of the Wales consultation document.

### Synopsis of Relevant Part of the Wales consultation document

- 8.3 The Wales consultation document noted access to London as a key policy issue of importance to Wales. The specific issue of air services from Cardiff to London City Airport is discussed, as well as the questions of rail access to South East airports, particularly Heathrow, and rail-air substitution.

### Summary of Findings

- 8.4 Thirty six out of the 70 respondents answered at least one question in this section. All of the respondents that answered the question on whether surface access schemes to facilitate journeys from the region to airports outside the region should be considered agreed that they should. Most respondents called for public funding, a number of which also called for a contribution from the private sector.
- 8.5 One half of respondents on the question of high-speed rail access believed that it would be an adequate alternative to direct air services, the rest said it would be complementary, a partial alternative or inadequate. A few respondents thought that a Cardiff to London City air service could be viable.

## Respondents' Views

**Question 1: Under all our National Policy scenarios, we forecast that a large proportion of passengers originating in Wales will still use airports outside Wales, predominately Heathrow for passengers from South Wales and Manchester for passengers in North Wales.**

- **Should surface access schemes to facilitate journeys from Wales to these airports be considered?**
- **What options should be considered for the improvement of surface access to airports outside Wales for passengers originating in Wales?**
- **How should these surface access improvements be funded?**

- 8.6 All 24 respondents to the first part of Question 1, from across all stakeholder groups, agreed that surface access schemes to facilitate journeys from Wales to airports outside Wales should be considered. Out of 26 respondents to the second part, 21 called for improved heavy rail access, 8 for improved road access and 7 for improved bus/coach access. On the question of funding, 7 out of 17 respondents said it should come from the government, 4 said it should be a mix of public and private funding and 3 said it should be privately funded by the aviation industry.
- 8.7 The Isle of Anglesey County Council and the North Wales Economic Forum supported a western rail link to Manchester Airport. Telford & Wrekin Council considered that improving rail access to Birmingham Airport by four tracking the section of line between Wolverhampton and Coventry would open up possibilities of through services from Aberystwyth and Pwllheli. The South and West Wales Integrated Transport Consortium of local authorities supported the western chord scheme for direct rail access to Heathrow and the Vale of Glamorgan Council also supported rail links from Cardiff to London airports.

**Question 2: What role might high speed rail links (primarily to London) serve as opposed to potential air services from Wales to the capital?**

**Table 24 – Would High-speed Rail Provide an Adequate Alternative?**

	Aviation Industry	Economic Interests	Surface Transport Organisations	Political Stakeholders	Wider Stakeholder Groups	Total
Adequate alternative	1	2	4	3	5	15
Partial/Inadequate alternative	4		2	1		7
Complementary	2	5		1		8
<b>Total Responses</b>	<b>7</b>	<b>7</b>	<b>6</b>	<b>5</b>	<b>5</b>	<b>30</b>
No Response	8	7	7	9	9	40
<b>Total Sample</b>	<b>15</b>	<b>14</b>	<b>13</b>	<b>14</b>	<b>14</b>	<b>70</b>

- 8.8 Table 23 shows respondents' views on Question 2. 15 out of 30 said that high-speed rail would be an adequate alternative. Aviation Industry stakeholders were more inclined to say that it was complementary, a partial or inadequate alternative. The Rail Passengers Committee for Wales believed that high-speed rail would be cheaper, safer and more flexible than an air service to London. The Welsh Local Government Association believed that flights from Cardiff to London were, of themselves, not as important as rail, bus or car which provided more competitive, convenient and cheaper alternatives, and it would particularly support improved rail access to Heathrow, Birmingham and Manchester. The Institute of Welsh Affairs thought that rail links would play a very useful role as they were likely to be more cost effective than air services. New airPort Ltd maintained that an air service to London was difficult to justify even with existing rail services. Cardiff International Airport thought that such services could be a partial alternative but expressed concern about the effect on journey times for passengers not travelling to the airport.

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**Question 3: Could a Cardiff to London City service be made viable?**

- 8.9 There were only 8 respondents to Question 3 of which 4 said yes, 1 said under some circumstances and 3 said no. Cardiff International Airport was sceptical because of the overall journey from origin to destination. The Institute of Welsh Affairs suggested that public sector support might be required for routes between Wales and Heathrow/Gatwick. The service has, in fact, now started and also operates to Swansea, via Cardiff.
- 8.10 In the next section respondents' views on Domestic Air Services for Wales are described.

## Domestic Air Services for Wales

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### Introduction

- 9.1 This section reflects the importance, or otherwise, that respondents attach to developing a network of domestic air services within Wales.
- 9.2 The section draws on respondents' commentary on the matters contained in Questions 1 to 3 under the heading Domestic Air Services for Wales in Section 8.3 of the Wales consultation document.

### Synopsis of Relevant Part of the Wales consultation document

- 9.3 The Wales consultation document considered options for connecting a number of airports around Wales with a network of domestic air services, either as a round-Wales air service or a radial network with Cardiff as a Welsh domestic hub.

### Summary of Findings

- 9.4 Twenty five respondents referred to domestic air services for Wales. There was support for a network of intra-Wales services based on Cardiff and a preference for a radial network, and in particular services to North Wales.

## Respondents' Views

**Question 1: Do you have views on the use of smaller airports within the Principality? What role might these airports play (particularly those in outlying areas) in providing feeder services to Cardiff?**

**Question 2: What domestic air services would most benefit Wales, and why?**

**Question 3: What role might internal air services play in improving round Wales transport links (particularly improving north-south links) and would such services merit public subsidy?**

- 9.5 Respondents' views on Questions 1, 2 and 3 on domestic air services were taken together.
- 9.6 Cardiff International Airport supported the development of smaller airports and the main opportunity would be to link outlying areas to the capital, with the first steps being direct services between Cardiff and Hawarden, Anglesey and Haverfordwest. Flintshire County Council also noted the potential for a Valley-Hawarden-Cardiff air service. The Isle of Anglesey County Council supported a service from Valley to Cardiff, the administrative centre, and other UK destinations, which would have a significant impact in breaking down the north-south divide and for which public subsidy should be seriously considered. Albert Owen, MP for Ynys Mon, supported the development of RAF Valley for both passenger and cargo flights. The Institute of Welsh Affairs preferred a modified radial service from Hawarden, Mona and Haverfordwest. Other supporters of north and west to south services were the CBI, Royal Town Planning Institute (Wales) and the South and West Wales Integrated Transport Consortium. Supporters of more extensive domestic networks included the Royal Institute of Chartered Surveyors – Wales and the Welsh Liberal Democrats.
- 9.7 Ceredigion County Council preferred the development of air services to UK and continental hubs. The Welsh TUC also sought direct links to London airports.
- 9.8 The Campaign for the Protection of Rural Wales believed that improved rail and other surface public transport links should be the primary recipients of public subsidy. The Rail Passengers Committee – Wales said that feeds to Cardiff Airport should be by surface transport only. Sustrans Wales had a concern that increasing air services as opposed to rail would undermine efforts to improve the quality and patronage of rail services in Wales. The Welsh Local Government Association saw a very limited scope for intra-Wales air services.
- 9.9 There was clearly a mix of views although a few themes were more commonly supported. There was more support than opposition for domestic air services and the most popular routes seem to be radial rather than round Wales, and in particular from North Wales. Those that supported the idea also supported the use of public subsidy.
- 9.10 In the final section of this report respondents' views on an Aviation Strategy for Wales are described.

## Aviation Strategy for Wales

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### Introduction

- 10.1 In this section respondents were asked to consider if their objectives for developing Wales' air services would be served by ascribing different roles or functions to Wales' airports, or is the better solution to rely on market forces to govern the distribution of traffic.
- 10.2 The section draws on respondents' commentary on the matters contained in Question 1 under the heading Aviation Strategy for Wales in Section 8.3 of the Wales consultation document.

### Synopsis of Relevant Part of the Wales consultation document

- 10.3 The Wales consultation document did not discuss the specific issue of an aviation strategy.

### Summary of Findings

- 10.4 13 out of 16 respondents said that there would be value in developing a Welsh aviation strategy and there were various suggestions as to what it should include.

## Respondents' Views

**Question 1: Do you think there would be any value in the region developing and regularly updating a region specific aviation strategy? If so, what should be its objectives?**

- to interpret the provisions of the Air Transport White paper in a regional context?
- to provide a short-term plan for delivering improved air services and new airport development in the region?
- to ensure the needs and impacts of the aviation industry are properly integrated with other regional strategies on economic, land use, the environment and transport?

10.5 There were 16 respondents to the first part of Question 1, of which 13 agreed that there would be value in an aviation strategy, and a further 2 agreed under some circumstances. 8 said that this could interpret the provisions of the Air Transport White Paper in a regional context, 9 said that it would provide a short-term plan for delivering improved air services and new airport development in the region and 9 said it would ensure the needs and impacts of the aviation industry were properly integrated with other regional strategies on economic, land use, the environment and surface transport.

10.6 The Welsh branch of the National Travelwise Association believed that there would be value in developing and regularly updating a region-specific aviation strategy that recognised the value of smaller airports and developed a hierarchy of facilities. The Royal Institute of Chartered Surveyors thought that a Welsh aviation strategy should cover route development, the development of Cardiff, access to London, Manchester and Birmingham and domestic services. The Campaign for the Protection of Rural Wales saw some virtue in a regional aviation strategy to complement strategies produced over the border in England, endorsed the objectives set out in the consultation document and noted a particular need for updating and monitoring.

## Annex A - Questions for Consultees

It is important that you complete the accompanying questionnaire because this will enable us to develop a quantified response to a range of key issues, alongside an analysis of the more qualitative written responses arising from the questions set out in this document, which are brought together at the end of this section.

In replying to the latter it would be helpful if you could structure your response to reflect the way the key questions have been set out; this will help significantly with the analysis and reporting of responses. Clearly if there are issues of importance to you which the questions do not address, or which you feel have not been covered adequately by the consultation document, you should also clearly set these out. In doing so you should bear in mind that any comments made on broader national issues set out in the National Conclusions and Key Policy Choices Consultation Document "The Future of Aviation" have been analysed and are being used to help prepare those aspects of the White Paper.

The following questions are those on which DfT and the Welsh Assembly Government are seeking responses based on this consultation document. You are invited to respond to some or all of these questions separately from the questionnaire which accompanies this document.

### NATIONAL POLICY SCENARIOS

While our UK wide National Policy Scenarios are not intended to be viewed as definitive statements of potential Government policy, they do provide a means of examining broadbrush alternative policy approaches.

- 1 Which, if any, of the National Policy Scenarios do you think should form the basis of the UK Government's national airports strategy to 2030 and why? Considerations might include:
  - enhancing consumer choice and accessibility to air services;
  - fostering a strong and competitive airline industry;
  - facilitating existing businesses to compete effectively in global markets;
  - attracting inward investment and inbound tourism;
  - ensuring aviation develops sustainably and minimises environmental impacts of growth;
  - minimising distance people have to travel;
  - reducing congestion; and
  - encouraging the use of public transport.
  
- 2 If you think additional capacity should be provided in the South East to meet the needs of regional air passengers interlining or accessing services from London airports via surface modes:
  - how much capacity do you think should be provided; and
  - where in the South East should it be located?
  
- 3 Which of the scenarios will most enhance consumer choice and accessibility to services in:
  - the UK as a whole; and
  - Wales.
  
- 4 Are there any other policy scenarios, including any combination of those set out in the document, which would better meet your aspirations for the development of regional air services and airports in Wales?
  
- 5 The Government is committed to bringing forward policies for civil aviation and airports that are sustainable. Please explain why you think your preferred scenario best supports the Government's sustainable objective?
  
- 6 Which of the policy mechanisms set out in Chapter 3 do you think are essential to delivering your preferred scenario? Are there any that you consider might assist in doing so but you do not consider essential? Are there any policy mechanisms not covered in Chapter 3 that you think should be considered?

### LOCATION OF AIRPORT CAPACITY

- 1 This document has described how airports in the region might develop, if policy is to meet demand. Do you have any comments on these suggestions for new infrastructure?
- 2 If your preferred strategy for the Wales involves accommodating growth in air services, where would the projected levels of growth best be accommodated and what form of airport development should be supported in order to achieve this?
- 3 If it does not, does Wales need all of its current complement of airports, and are there particular airports whose development should be constrained and why?
- 4 If you are of the view that Wales should seek to accommodate its own demand (and attract demand from the South West, Midlands and North of England) how might this best be achieved? Can the existing airports be developed to provide sufficient capacity?
- 5 Is it important that demand should be met direct from Wales, or can the needs of the region be met by passengers interlining at hubs elsewhere in the UK or in continental Europe

#### **COMPETITION V COMPLEMENTARY DEVELOPMENT**

- 1 Are there opportunities for greater partnerships between airports, airlines and the public sector stakeholders to foster the wider economic interests of Wales?
- 2 Is competition always preferable to complementary development? Do you think there are any circumstances in which the latter approach would bring wider economic or other benefits?

#### **ECONOMIC BENEFITS**

- 1 How important is the contribution of aviation to the Welsh economy. How and where can the benefits be captured?
- 2 What barriers need to be addressed if the jobless on benefit, particularly in low employment areas, are to take advantage of the employment opportunities that arise from growth in aviation and airport services? Are there any solutions?
- 3 What systems or processes will help improve links between aviation industry employers and intermediaries assisting the jobless and why?
- 4 What should be the role of Welsh Assembly Government and Welsh Development Agency in achieving this and what should be their priorities? What mechanisms are available to them to support any approach that is agreed?
- 5 Would improved air links help to:
  - increase inbound tourism to Wales?
  - reduce reliance upon London as the primary point of interest for airborne inbound tourists?
- 6 If you think it would, what measures could Government, regional tourism interests and the aviation industry take to facilitate this?
- 7 Is there a role for airports in Wales as a focus for economic clusters and should such clusters be encouraged?
- 8 How important are air cargo services for the economic objectives of Wales? What measures are needed to give airfreight and mail operators confidence to plan their long-term investment in airport facilities? Should night-time slots be guaranteed for airfreight and mail? Should such guarantees be contingent upon noise/emissions standards of the aircraft being operated?
- 9 Is there scope for capturing more of the UK and global aircraft maintenance market at Welsh airports and how might this best be achieved? What would be the advantages and disadvantages of encouraging growth of this sector?

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- 10 How important is business aviation for inward investment and other economic objectives of Wales? If business aviation cannot be accommodated at the major airports, how should the needs of this sector be met?
- 11 How important is it for your business/organisation that the UK remains the aviation Gateway to Europe.
- 12 Would the relaxation of the UK's current policy in relation to international air service agreements to allow unlimited 5th Freedoms from regional airports, materially affect the ability of Wales's airports to capture new services?

#### **SOCIAL INCLUSION**

- 1 Can the development of aviation within Wales help to address deprivation and social exclusion?
- 2 What measures are needed to ensure the benefits of growth in the air transport industry are transmitted to less economically successful areas of Wales?

#### **ENVIRONMENTAL IMPACTS**

- 1 Are there any environmental impacts from the National Policy Scenarios or infrastructure projects appraised in this document, which you regard as unacceptable?
- 2 Could these environmental dis-benefits be controlled or mitigated to reduce them to acceptable levels? Do you have particular views on this in respect of:
  - noise (day-time and night-time);
  - air quality (air traffic and surface access impacts);
  - land and property take (residential, agricultural, green belt, landscape);
  - biodiversity;
  - climate change;
  - other environmental impacts.
  - either in general, or at particular Welsh airports.
- 3 Would you support the scenarios to keep pace with consumer demand if they carried with them enforceable targets for environmental improvement (eg air quality, noise, public transport mode split, energy savings, and waste reduction)?
- 4 Is there a case for reviewing green belt boundaries as they affect airports in the light of any of the scenarios. What would be the advantages and disadvantages? Should airports be removed from the green belt altogether?

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### **SURFACE ACCESS**

- 1 Should the focus of any public expenditure which may be available to help improve surface access to Welsh airports be on improving local or inter-regional access or both, and why?
- 2 Under many of our National Policy Scenarios there will be a large increase in the number of passengers using the Wales airports over our forecasting period. Our analysis indicates this will place considerable strain on surface access provision, particularly key road links in a number of places:
  - Should these surface access constraints be addressed?
  - Which schemes outlined in the document do you consider are the key ones for improving access to the regions airports and what priority should they be given relative to other projects. Which do you think should not be taken forward?
  - Are there any surface access schemes identified in the analysis that you support or oppose? Please give your reasons.
  - Are there any surface access improvements, which should be regarded as preconditions before new capacity can take place at airports within the study area?
  - How should these surface access improvements be funded?
- 3 How might the share of public transport access to airports be increased?

### **AIRCRAFT MAINTENANCE**

- 1 Cardiff already serves as an important focus for aircraft maintenance and related activities; how can this sector's potential be maximised throughout Wales. Is the proposed Aerospace Park at RAF St Athan the way forward, or are there other alternatives?

### **ACCESS TO LONDON**

- 1 Under all our National Policy scenarios, we forecast that a large proportion of passengers originating in Wales will still use airports outside Wales, predominately Heathrow for passengers from South Wales and Manchester for passengers in North Wales.
  - Should surface access schemes to facilitate journeys from Wales to these airports be considered?
  - What options should be considered for the improvement of surface access to airports outside Wales for passengers originating in Wales?
  - How should these surface access improvements be funded?
- 2 What role might high-speed rail links (primarily to London) serve as opposed to potential air services from Wales to the capital?
- 3 Could a Cardiff to London City service be made viable?

### **DOMESTIC AIR SERVICES FOR WALES**

- 1 Do you have views on the use of smaller airports within the Principality? What role might these airports play (particularly those in outlying areas) in providing feeder services to Cardiff?
- 2 What domestic air services would most benefit Wales, and why?
- 3 What role might internal air services play in improving round Wales transport links (particularly improving north-south links) and would such services merit public subsidy?

#### **AVIATION STRATEGY FOR WALES**

- 1 Do you think there would be any value in the region developing and regularly updating a region-specific aviation strategy? If so, what should be its objectives?
- to interpret the provisions of the Air Transport White Paper in a regional context?
  - to provide a short-term plan for delivering improved air services and new airport development in the region?
  - to ensure the needs and impacts of the aviation industry are properly integrated with other regional strategies on economics, land use, the environment and transport?

## Annex B - Glossary of Abbreviations

ALARP	As Low as Reasonably Practical
AONB	Areas of Outstanding Natural Beauty
ATM	Air Transport Movements
ATWP	Airport Transport White Paper
BA	British Airways
BE	British European
bmi	british midland
CAA	Civil Aviation Authority
CAEP	Committee of Aviation Environmental Protection
CPO	Compulsory Purchase Order
DARA	Defence Aviation Repair Agency
dBA LEQ	Local Equivalent Noise Index in Decibels
DEFRA	Department for Environment, Food and Rural Affairs
DETR	Department of the Environment, Transport and the Regions
DfT	Department for Transport
DTI	Department of Trade and Industry
DTLR	Department for Transport, Local Government and the Regions
EC	European Commission
ECAC	European Civil Aviation Conference
EEA	European Economic Area
EIA	Environmental Impact Assessments
EPNdB	Effective Perceived Noise in Decibels
ERCD	Environmental Research and Consultancy Department (of the CAA)
ETRAC	Environment, Transport and Regional Affairs Committee
EU	European Union
FG	Facilitating Growth Scenario
GA	General Aviation
GDP	Gross Domestic Product
GIS	Geographical Information System
GWR	Great Western Railway
IATA	International Air Transport Association
ICAO	International Civil Aviation Organisation
LPA	Local Planning Authority
MPPA	Million Passengers Per Annum
MRO	Maintenance, Repair and Overhaul
NATS	National Air Traffic Services
NAFW	National Assembly for Wales
OEF	Oxford Economic Forecasting
ATM	Air Transport Movement
PAX	Passengers
PDR	Permitted Development Rights
PPG	Planning Policy Guidance (Note)
PSO	Public Service Obligation
PSZ	Public Safety Zone

PTF	Propensity to Fly
RAS	Regional Air Services (Studies)
RASCO	Regional Air Services Co-ordination Study
RCD	Regional Consultation Document
RDA	Regional Development Agency
RET	Rapid Exit Taxiway
RRC	RASCO Reference Case
SAC	Special Area of Conservation
SAM	Scheduled Ancient Monuments
SE	South East
SEC	South East Constrained Scenario
SERAS	South East and East of England Regional Air Services Study
SID	Standard Instrument Departure
SPA	Special Protection Area
SPAM	Second Passenger Allocation Model
SEC	South East Constrained Case
SPA	Special Protection Area
SSSI	Site of Special Scientific Interest
STAR	Standard Terminal Arrival Route
TMA	Terminal Manoeuvring Area
UK	United Kingdom
UKC	UK-Wide Constrained Scenario
V/C	Volume to Capacity ratio
WAG	Welsh Assembly Government
WDA	Welsh Development Agency

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