

Date: 30 January 2002
Time: 14.00 – 17.30
Venue: Committee Room 3, National Assembly Building, Cardiff Bay
Title: Draft report of the Cardiff International Airport Study Group

Purpose

1. To present to the Committee the draft report of the working group set up to consider the role of Cardiff International Airport (at Annex A).

Action

2. The Minister would welcome the Committee's views on the draft report.

Background

3. A critical element in the economic growth, competitiveness and prosperity of a region is the presence of a thriving regional airport. While a significant generator of primary and secondary employment itself, the airport would also provide a gateway to enable the exploitation of national and international economic opportunities.

4. Cardiff International Airport (CIA) has experienced considerable growth in scheduled and charter traffic in recent years. Annex D sets out passenger numbers in tabular form together with similar information for other comparative regional airports in the U.K. During this time its commercial owners, TBI plc who acquired the airport in 1995, have invested £17.5 million in a programme of development to augment car parking provision and passenger terminal facilities. However, the regularity and coverage of scheduled flights is limited and there continue to be calls for improvements to access routes to the airport.
5. The interests in the airport – both public and commercial - are varied, ranging from those of the owners (TBI plc) to ASPBs (such as the WDA and WTB), as well as local authorities and business. In April 2001 the Deputy First Minister and the Minister for the Environment asked the WDA to chair a group that would involve these interests and make recommendations for increasing the economic multiplier impact of the CIA on the South Wales region; and to examine the need for improved transport accessibility to CIA. The full Terms of Reference for the Group are at Annex B and its membership at Annex C.

6. The Group has now produced a draft report that sets out the issues bearing on the

development of the CIA and the wider economic case supporting it. The report contributes to the debate about the CIA in presenting the issues; considering the future of the CIA as a both a local and national resource; the transport, infrastructure and skills issues integral to its development; and the presentation of a number of broad recommendations.

7. The Terms of Reference remitted the Group to report its findings to the Economic Development Committee and this paper fulfils that commitment. It is envisaged that once the Committee has discussed the Report, the Group will finalise the document, including the recommendations for the future, and submit formally to Assembly Government Ministers for their consideration. The report covers a number of issues that are transport related which will fall to the Environment Minister's responsibilities.

Finance

8. There are no financial implications arising from this paper. Should it be decided to pursue any of the recommendations of the final report these will be addressed through the normal budget procedures of the Assembly Government and the appropriate sponsored bodies.

Economic Policy Division 1

Annex A

DRAFT

Cardiff International Airport (CIA) Report

Strategic Context

Successful regional economic development is a major factor in the growth of national economies. Flourishing cities and regions act as a magnet to attract further investment to an area, due to the prevalence of well developed transport links, professional service functions and cultural, sporting and retail amenities. These in turn play a critical role in the attraction and retention of skilled people. Common features of European cities and regions which have experienced significant economic growth such as Dublin, Barcelona and Birmingham include strong identities, a high quality of life and a sophisticated transport infrastructure.

A key element of a dynamic region is accessibility on a trans-national and global scale, typically through a well-connected airport which allows for comprehensive national and international links. For business, commerce, trade and tourism, it is vital to be able to easily

travel from one location to another so the role of the local airport cannot be overstated in the development of a city and region. Modern regional airports are, therefore, an essential element in the infrastructure of a successful and competitive nation. Cardiff International Airport's importance to the region's profile and its relationship with the South Wales region is increasingly regarded as a crucial component in progressing the area's development.

Major European Capitals such as Cardiff need an efficient and attractive air 'Gateway' - not only to the City itself – but also to the region and to the rest of Wales. This is vitally important, not only for the perception of the region, but more practically to increase its ability to compete for major bids such as the current European Capital of Culture bid and to host significant national and international sporting events.

The Welsh Capital City and its surrounding area has grown enormously in the last ten years, both demographically and in employment terms, with the prospects of a strengthening economy. However the global market is increasingly competitive and if that growth is to be sustained a crucial element will be a flourishing airport offering a first class range of facilities.

Cardiff International Airport must be developed to achieve the economic impact on regional competitiveness seen in other locations, both in attracting new investment and overseas tourism. However, whilst many factors such as surface access, availability of flights, land and skills provision etc are less than optimum, fundamentally the role of the Airport in supporting the South Wales region is unclear and its promotion often lacks coherence. This is in contrast to comparable regions elsewhere where the local airport forms a key and integrated element in promoting regional competitiveness.

The way forward has to start by making CIA a fundamental part of an integrated and ambitious programme for economic promotion of the region as well as a part of an integrated national transport system. There are significant opportunities to expand the role played by the airport in the further development of the economy. For example, recent changes in civil aviation could lead to greater growth at Airports such as the CIA which require little overflying of housing. It is important that significant opportunities such as this offered by the Airport's natural advantages are fully investigated and exploited. Whilst addressing the potential for other airports within the South Wales region was outside its remit, the study group also believes it is important that any new services proposed for those airports are as far as possible designed to be complementary with services at CIA.

Whilst recognising the practical difficulties involved in increasing the number of flights and improving surface access, it is also time to be ambitious and aspirational. The growth of the Airport could provide the means for the sustained economic development of the area well into the 21st Century. If the airport and its range of routes does not expand it will rapidly become the weakest link in the South Wales economy and will restrain the area's ability to grow and compete within the global marketplace.

Economic Case

The economic importance of airports stems not only from the fact that they are major generators of economic prosperity themselves. They influence company location decisions and act as magnets for a wider range of economic activity. The total impact of an airport can amount to 4000 jobs per million passengers per annum, taking all factors into account.

The presence of an international airport can be a critical factor in:

- attracting new inward investment from outside the area, especially companies from overseas;
- retaining existing companies in the area, whether they had previously been inward investors or indigenous operations;
- securing the expansion of existing companies in the face of competition with other areas;
- promoting the export success of companies located in the area by the provision of passenger and freight links to key markets;
- enhancing the competitiveness of the economy, and the companies in it through the provision of fast and efficient passenger and freight services;
- attracting business and leisure visitors and hence inbound tourism to the area, generating income and employment in the tourism industry;
- raising the profile and status of the region – a strong airport equals a strong region.

The internationalisation of Wales is one of the aims of the Assembly's A Winning Wales. To improve the export and international trade performance of Welsh companies, Wales will need to have effective transport links in place. This will impact on travel patterns and in the medium and long terms generate further demand for air services.

Building on the successes of the European Heads of Government Meeting in 1998 and the Rugby World Cup 1999, the region has aspirations as a regular host of high profile conferences and events. Indeed, the success of the Ryder Cup Bid, the hosting of the Network Q Rally and the current bid for European Capital of Culture all have a positive impact on the (business) tourism potential of South Wales. They also serve to underscore the necessity of having the right infrastructure to maximise the positive benefits that such opportunities present.

Research undertaken in the region around Schipol Airport reported that 72% of large international companies cited their decision to locate there as being dependent on the presence and development of the airport.

At Norwich International Airport, KLM Engineering initially set up a base maintenance operation employing 400 people. Then in 1998, they also built a call centre employing a further 300 people to handle all of KLM's bookings in the UK.

Tourism

Wales attracted 980,000 overseas visitors in 2000. The principal source markets in order of importance were:-

Republic of Ireland	196,000
USA	157,000
Germany	112,000
Australia	75,000
France	71,000
Netherlands	49,000
Canada	49,000
Others	271,000
Total	980,000

Source IPS 2000

This is a low figure when compared with Wales' closest competitor regions of Scotland (1.69M) and South-West England (1.63M). In addition overseas visitors stay longer and spend more per night in these regions than they do in Wales.

50% of Welsh visitors in 2000 travelled to the UK by air, almost all using airports outside of Wales reflecting the limited flights to and from Cardiff International Airport. This places Wales at a severe disadvantage especially when competing for the growing overseas 'shortbreaks' market where proximity of the destination to the arrival airport is essential.

The following trends are likely to ensure the continued growth of these overseas shortbreak markets:-

- the growing number of workers in UK and Europe who, being cash rich and time poor, want maximum value for time and the minimisation of time taken to get to their destination;
- the growth of low cost airlines;
- the growth of shorter holidays which are booked at the last minute as employees reduce the time they spend away from the workplace.

In terms of longer overseas holidays, Wales would particularly benefit if CIA had scheduled

services from North America which is a key market for Wales.

In summary, a strong airport is:-

- a direct provider of on-airport jobs
- a provider of jobs within the immediate locale (aerospace maintenance, repair and overhaul operations/ St. Athan, DARA etc)
- a nucleus for attracting commercial development and employment. The aviation functions of airports are increasingly seen as catalysts for other types of on/adjacent site development, including business parks and other types of logistics.
- a catalyst for the wider economic opportunities provided by the fostering of positive international perceptions and raising the profile of the region.
- A gateway for international trade.
- A creator of benefits on a number of levels – tourism, business tourism, culture, leisure and investment opportunities.

Surface Access

The need for airports to be well connected to their region and to the rest of the country. makes the issue of access central to the future growth of CIA and to the South Wales economy.

Likewise, if CIA is to expand its range of services, both passenger and freight, improved access is vital. Evidence has been put forward that 'poor' access does constrain efforts to improve the range of scheduled services. Furthermore, at least one major air freight company has cited poor access as a major reason for not locating at airports such as Cardiff International Airport.

Experience at other regional airports in the UK has demonstrated that improved access has proved to be a major determining issue in the further growth of the airport. The issue is being actively pursued at Luton for example where poor access is the major constraint in further expansion.

However improved access needs to be delivered in a balanced way and in doing so seek to enhance other related economic initiatives in the area such as the proposals for an MRO Centre of Excellence at St. Athan and the strategic employment sites being developed in Barry.

Rail

The Assembly Government and the Strategic Rail Authority has funded the Vale of Glamorgan / Bridgend Council to implement a £13.4m scheme to reintroduce passenger services onto the Vale of Glamorgan Line. This will create a new

station at Rhoose forming the basis for an interchange to the airport Terminal. This is a welcome initiative that will give a real public transport alternative to staff and passengers using the airport. It will allow a good link to the regional and national rail system and it is essential that the new local rail franchises reflect this. The airport owners (TBI) need to work closely with the Vale of Glamorgan Council and the other public and private sector partners in developing this interchange and establishing a clear Transport Plan for the airport.

However, such rail links need to be seen in proper perspective. Largely because of timetabling and interchange issues, rail travel rarely forms a significant proportion of the overall number of journeys to airports.

Bus

There have been a number of attempts over the years to establish successful bus links, particularly between Cardiff and the airport. Some have been subsidised by TBI or by the Vale of Glamorgan Council and others run commercially by a bus operator. Again, because of timetabling and 'critical mass' of demand they have largely failed. However, a new 'Cardiff Airport' liveried bus service is to be introduced later this year by Cardiff Bus which it is hoped will achieve greater impact, but this will still be small in terms of total passenger journeys.

Road

Consequently the vast majority of airport users will continue to arrive by road. Improved road access to CIA has been debated for many years. During the 1990's a scheme to promote an improved road access to the airport was put forward by South Glamorgan Country Council, the then Highway Authority.

A series of independent consultant studies have consistently identified the lack of good road access to the airport as being a significant inhibitor to the growth of the airport and indirectly to the growth of the Cardiff and South Wales economy. The Vale of Glamorgan Council on its formation in 1996 immediately established as one of its key strategic priorities the promotion of a new road link to the Airport.

Design work was undertaken on Phase I from Culverhouse Cross and the then Welsh Office and now the National Assembly for Wales have financially supported design work on the scheme. No funding has, however, been identified for the construction of the road.

The need for an improved link is real and not just perceived. There are clearly journey time difficulties, particularly in the peak. The uncertainty and

unpredictability that this creates is a major constraint on CIA's continuing attractiveness and growth as a major regional airport. There is a perception abroad that CIA is remote, badly connected to London and the Midlands and is therefore a poor and second rate 'Gateway' into Britain. Recent public comments such as those made by the Director-General of the CBI only serve to reinforce this negative impression.

It is not the purpose of this report to examine the technical issues relating to the provision of an improved road link. There have been several studies and the issues are well documented elsewhere. All routes involve major planning issues as they involve protected open countryside and therefore great care is needed in choosing a preferred route.

A current Assembly Government funded study is examining options at Culverhouse Cross and this will inform debate on possible improved routes to the Airport. Until this Study reports early in 2002, the discussion of routes should be deferred.

A new road from Culverhouse Cross to the Airport could cost up to £100m. Funding is therefore a key issue. The road is not in an Objective 1 funding area.

Likewise, the national significance of an improved road to the airport means that consideration could be given to including it in Wales' Trunk Road network and therefore funding and maintaining it accordingly. There is Guidance that regional airports should be linked by Trunk Roads.

Bids have been submitted to the Assembly Government by the Vale of Glamorgan Council for many years under the Transport Grant scheme. However, it is accepted that the Transport Grant 'pot' is relatively small and therefore key strategic decisions would be required by the Assembly Government. It would clearly improve the prospects of funding for any road improvements if they provided other regeneration benefits such as improving links to Barry and its Waterfront development and to St. Athan.

Private finance options such as tolling, shadow tolling and associated land development may merit consideration. However, this could only be a solution for a new road route and these options pass through protected countryside, where there are clear and well established policies against further development.

A new road could take anything between 5 and 10 years to plan and build. This is clearly unacceptable if the Airport is to establish itself as a key driver in the growth of the region's economy. It is therefore important not to be preoccupied with delivering one big solution and consideration needs to be given to a phased and more immediately deliverable set of improvements. Shorter-term solutions, such as junction improvements, signage etc., should not, however, be seen as 'cheaper fixes' and therefore do away with the need for a more

fundamental scheme.

Flight Services

CIA has seen strong growth in passenger numbers both for scheduled and charter flights in the last few years. However the airport is still dominated by the charter market and only 24% of flights are for scheduled services.

Whilst charter flights do provide substantial on-airport revenue they create little added economic value to the region. A greater range and regularity of scheduled services, which are the only services attractive to business passengers are the key to maximising the economic impact of the airport.

At present only 13 UK and European destinations are directly served from CIA and for a number of these routes there are only limited daily services being provided. By contrast, Birmingham International Airport has direct scheduled flights to more than 40 European cities and to North America. Barcelona has scheduled flights to 80 destinations and from Dublin you can fly direct to 47 European cities.

There clearly is potential to attract more business passengers to CIA. Civil Aviation Authority (CAA) statistics demonstrate that there is significant leakage of business passengers from the CIA catchment area (3.5 million in 1999). Capturing even a proportion of this leakage would create many more jobs and significantly enhance the current perception of the airport. This potential is further enhanced by the capacity constraints that are increasingly restricting growth in the South East of England, offering regional airports new opportunities for route development.

However, the recent strong growth achieved at Bristol Airport is a serious counter-threat to this opportunity. The arrival of the low cost operator 'Go' at Bristol has further increased the range of services available. It is essential that action is undertaken to meet this competitive threat, including the possibility of attracting a low-cost operator to CIA.

Understanding the function of an airport and the part it plays in the overall air travel process is fundamental to being able to determine what may be done to enhance its development. An airport is simply a conduit through which an airline may access a particular catchment area, or market. Decisions about which routes to operate are made by airlines based upon a detailed evaluation of the 'business' or commercial potential on offer.

The 'Catch 22' of course is that latent demand cannot be proven until supply is in place, whilst supply of new routes by carriers is difficult to achieve without strong evidence of demand. The commercial initiative for new routes is essentially in the hands of the suppliers.

A range of factors play a part in determining the relative attractiveness of a particular airport to the market within its catchment area. That attractiveness is also a function of competition with other adjacent airports and their airlines sharing parts of that catchment area. Key factors include:

- Market perception and potential
- Advertising and promotion
- Location
- Accessibility, which affects the size (both geographical and population) of the catchment area
- Price
- GDP per Capita (there is a direct relationship between GDP per Capita and propensity to fly)
- Range of services offered
- Frequency of service
- Facilities and customer service

Many of the Welsh-originated passengers that choose not to travel from CIA are taking short haul flights to European destinations. Demand now or in the foreseeable future will be insufficient to contemplate the introduction of any direct long haul scheduled services from CIA. Access to long haul destinations will be served more effectively by improved links to European hub airports.

Strategy should therefore be focused on developing the airport's reputation as a well-connected regional airport through a twin track approach of both developing more (both in destinations and numbers) direct short-haul flights to European cities and increasing links to a range of European and possibly UK hub airports.

State aid rules prohibit financial assistance to airlines to 'pump prime' new routes. However there are other efforts that can be made. This need to start with a better understanding of the needs of local businesses and inward investors. A shared approach is essential with greater co-ordination between TBI, WDA and appropriate public sector partners resulting in a concerted effort to attract airlines to develop new services supported by a focused marketing initiative for key routes.

It is clear from the experience at other airports that the introduction of low fare airlines not only satisfies certain existing demand but also generates new markets. However, the long-term consequences of the market dynamics these carriers introduce must be examined carefully.

Freight

CIA has the potential to handle considerably more freight and offer a number of benefits to

potential customers. However at present the volume of freight at CIA is comparatively small.

Last year 3,500 tonnes of freight and mail was handled through CIA compared with 180,000 tonnes at East Midlands, one of the major freight forwarding and cargo handling airports outside of London Heathrow.

However, CIA has a number of freight forwarders on site as well as Servisair Cargo, the largest freight handler in the world. The airport has runway capability to handle the largest aircraft types and CIA has an all year round, 24-hours per day operation, with an excellent weather record. It has the capability of handling bulk cargo and hazardous goods, and there is room for expansion.

The two key factors to attract cargo operators however are volume of flights (as most air cargo is carried in the holds of passenger aircraft) and good road access to the national motorway network. Road access is an issue that has been raised by on-site freight forwarders, although this is partially mitigated by the fast turnaround that can be offered.

A Freight Forwarders and Export Workshop is to take place at CIA in February 2002 organised by Cardiff Business School. This and other future events such as the MRO (maintenance, repair and overhaul) Europe Conference to take place at the Cardiff International Arena in September, 2003 provide opportunities for TBI and its private and public sector partners to promote the opportunities offered by the airport in a coordinated fashion.

Skills Availability

The future expansion of CIA and simultaneous expansion of the Defence Aviation and Repair Agency's (DARA) maintenance, repair and overhaul capability at St. Athan will impact upon the existing skills development agenda for the region.

To achieve the vision for CIA will require the skills identification and development mechanisms to be highly co-ordinated with expansion of physical and operational activities at and around the airport site. Many of those mechanisms are already in place with others currently being developed to ensure responsiveness and flexibility to new development opportunities such as the CIA project.

The newly emerging Sector Skills Councils, working with ELWa, Future Skills Wales and its Employer Group, will play a vital role in providing regular quality information on skills shortages within region generally and examining high level developments such as those planned at CIA in their analyses. ELWa will ensure that the suppliers of skills in Wales – be they colleges, universities, schools, vocational training providers or employers – will be able to strategically respond to new and growing demands in their locality in a flexible and highly responsive manner.

At this point in time anticipated demand is likely to be:

- Service sector personnel to meet the demands of the airport expansion.
- High level engineering skills to meet the needs of the DARA expansion and planned 'Aerospace Park'.
- Skilled construction workers, dependent upon any decision taken to improve road access to the airport.

Clearly, this ambitious proposal can only be successful through genuine partnership working. It is vital that ELWa is closely involved with the project from the planning stage through to implementation to ensure it is fully able to respond to the varied and demanding skills issues that will emanate from the proposed economic development of the airport area.

Conclusions

Growth of CIA is vital to the sustained economic growth of South Wales. CIA is delivering considerably below its maximum potential in economic benefit terms against comparator regional airports as evidenced by:

- Leakage of Welsh originated business (3.5m p.a.) travellers who choose not to fly from Cardiff.
- Little spin-off development adjacent to the airport, as evidenced by poor take up of the Airport Business Park.
- Widespread public perception of CIA as a 'holiday' airport rather than an integrated part of the economic development profile of the region.

The principal reasons for this are:

- Limited destinations offered and low number of scheduled flights. Pricing of flights is also comparatively expensive reflecting low volumes and cost of operating small aircraft.
- Poor surface access particularly at peak times accompanied by an 'anecdotal' perception the airport is remote from the UK motorway network.
- Limited availability of land for investment worsened by the cost of providing land relative to its market value, in turn leading to a lack of perceived demand from occupiers.
- Too little concerted promotion of CIA by both public and private sectors as a key element of the region's economic infrastructure.
- A general lack of confidence in the potential to achieve a step change improvement in the facilities on offer arising from limited aspirations and low ambition.

There are however areas where there is clear potential for growth:

- 3.5m Welsh travellers per year could ordinarily be expected to prefer CIA, all things being equal, if there were sufficient flights at reasonable cost.
- There is growing congestion at the principal airports in England creating longer delays, higher travel costs and reducing land related activities.

Recommendations

1. The sustained economic growth and promotion of the region is vital to Wales' continued prosperity and regeneration. The region's demand for an airport is not just to meet the needs of today, but planning must be robust enough to cater for the medium and long term vision for the Nation as a whole. The issue cannot be considered in isolation but must be addressed in the wider economic development context of what is proposed for Wales.
2. The public sector needs a better understanding of the airport's business, and the market issues that affect its development. Likewise , TBI need a greater understanding of the foreign direct investment (FDI) and inbound tourism opportunities thereby allowing marketing of the airport to support and complement marketing of the region. Such an understanding should lead to a more co-operative approach, working towards confirmed objectives of mutual benefit.
3. Closer collaboration is needed between TBI, WDA, WTB and local authorities to share intelligence and information, and to address issues of mutual concern relating to the airport's growth and development. The route development potential should be marketed, both to and in conjunction with the airlines. In particular all the partners need to work together in endeavouring to attract a low-cost operator to CIA.
4. Marketing support could be provided to the CIA by the Assembly Government/WDA. Concentrating on the attraction of (FDI) and inbound tourism, this will ensure that CIA is consistently mentioned in the literature of WDA and the WTB, hence raising its profile. Closer relationships with WTB, Cardiff Marketing Ltd. and local authorities would promote closer collaboration on event attraction.
5. A clearer regional and local planning and policy framework would enable TBI to have greater confidence in their ability to secure future developments. This framework should address key issues of need, benefits and criteria for site selection. A co-operative approach should be developed between the public sector and CIA to link areas of need with areas of opportunity.
6. The surface access to the surrounding region and the airport needs to be improved in order to change the perception of the market and to improve the competitiveness of both. This will ensure that the greatest potential is achieved in the shortest possible timescale. Improvements in airport performance will in turn increase the attractiveness of the region and as its economy develops so the appeal of the Airport to Airlines increases and so on.

7. Further investigation is needed into the potential for providing utilities and other necessary infrastructure to the Airport Business Park. Housekeeping issues need to be addressed, in order to improve the appearance of access to CIA, particularly signage and improving the environment by keeping verges trimmed and litter free. This, of course, improves the image of the region to inbound foreign visitors.

Annex B

CARDIFF INTERNATIONAL AIRPORT STUDY GROUP

Terms of Reference

The group is tasked with:-

1. Making recommendations for increasing the economic multiplier impact of CIA on the South Wales region.
2. Examining the need for improved transport accessibility to CIA.

CIA is a well performing regional airport which has achieved considerable growth both in charter and scheduled passenger traffic particularly over the last 3 years. The airport owners, TBI plc, are currently constructing additional car parking facilities and have recently announced proposals for substantial improvements to the passenger terminal facilities. However, the regularity and range of destinations offered by scheduled flights is considerably limited and too high a proportion of Welsh originated business and domestic travellers travel via other UK airports.

In the last years Transport programme, the Assembly Government announced the creation of a new rail station at Rhoose to serve the airport but there have been calls, particularly from business organisations, to improve the existing road access to the airport.

There is additional development land within the perimeter of the airport available for air-related businesses and British Airways Maintenance Company (BAMC) services and maintains its own aircraft from a state of the art facility on the north-western side of the airport. The 60 acre Airport Business Park on the north-east of the airport however has attracted only one occupier. There is also a small air cargo terminal to the east of the passenger terminal.

In addition to addressing the general economic and access issues the group should

specifically consider the potential for:-

1. Increasing scheduled air services to CIA.
2. Increasing related business activity at the airport particularly in the maintenance, repair and operation (MRO) of aircraft.
3. Increasing air cargo.

The potential impact on the region of the proposed renewal of the Defence Aviation Repair Agency facilities and an associated aerospace centre of excellence needs also to be considered.

The group should consider the social and environmental impact of its recommendations and have regard to the Assembly Government's cross-cutting themes of equal opportunity, sustainability and social inclusion.

The group will be chaired by the WDA and report to a steering group of Assembly Ministers. It will meet initially monthly or as required. It should aim to present its recommendations to the Economic Development Committee of the National Assembly in December of this year.

Annex C

CARDIFF INTERNATIONAL AIRPORT STUDY GROUP

Membership

Karen Thomas, Chair	<i>Welsh Development Agency</i>
David Swallow	<i>Welsh Development Agency</i>
Nigel Adams	<i>Wales Tourist Board</i>
Eirlys Thomas	<i>Wales Tourist Board</i>
Marcella Maxwell/Jeff Andrews	<i>South East Wales Economic Forum</i>
John Sheppard/Sheila Davies	<i>South East Wales Economic Forum</i>
Huw Roberts	<i>South West Wales Economic Forum</i>
Rob Currie	<i>TBI plc</i>
Vincent Rey	<i>Cardiff International Airport</i>
Jon Horne	<i>Cardiff International Airport</i>
Frank Maloney	<i>Cardiff Chamber of Commerce</i>
Vicki Lloyd	<i>Cardiff Chamber of Commerce</i>
David Rosser	<i>Confederation of British Industry</i>
Rob Quick	<i>Vale of Glamorgan Council</i>

Phil Williams	<i>Education and Learning Wales</i>
David Morgan	<i>Education and Learning Wales</i>
Anne Stephenson/Reg Kilpatrick	<i>Economic Planning, National Assembly for Wales</i>
Peter Stalder	<i>Economic Planning, National Assembly for Wales</i>
Bob Oliver	<i>Transport Policy, National Assembly for Wales</i>
Denzil Jones	<i>Transport Policy, National Assembly for Wales</i>

Table 1: growth of regional airports

Airport	1991	2000	Average Growth rate per annum %	Rank based on total passenger traffic in 2000	Rank based on total scheduled passengers in 2000	Rank based on total Charter passengers in 2000	Rank based on total Domestic scheduled passenger traffic
Manchester	10,101,421	18,352,115	6.9	1	1	1	3
Birmingham	3,246,527	7,493,220	9.7	2	2	2	7
Glasgow	4,154,013	6,924,216	5.8	3	3	3	2
Edinburgh	2,339,538	5,497,696	10.0	4	4	11	1
Newcastle	1,526,542	3,147,351	8.4	5	6	4	8
Belfast International	2,168,000	3,128,244	4.2	6	15	8	4
Aberdeen	2,020,003	2,481,164	2.3	7	11	10	5
East Midlands	1,144,562	2,226,866	7.7	8	9	5	13
Bristol (1)	783,000	2,125,514	11.7	9	7	6	12
Liverpool	456,846	1,981,031	17.7	10	5	14	9
Cardiff International	513,259	1 499 824	12.7	12	12	7	17

(1) Figures for 2000 include part year only operation of Go! airline