
Appendix F: Air connectivity report for Wales

F.1 This appendix provides an overview of the direct and indirect air connectivity of Wales by analysing the itineraries of passengers originating or terminating at Welsh airports (mostly at Cardiff International Airport) in international routes during May 2013. As seen in Table F1, only 85,300 passengers flew between Wales and the rest of the world, which represents 1.5% of the total for UK regions. It is worth noting that this does not include Welsh passengers that transfer to other UK regions by road or rail (mainly to South East England) to start their journey. In the absence of detailed information on said transfers, this report does not intend to be an accurate representation of the air transport demand of Welsh residents/visitors, rather than an assessment of the connectivity options that are available in the region's airports.

Table F1. Breakdown of UK regional traffic to/from worldwide destinations (May 2013)

Traffic originating/terminating in	Passengers ('000)	%
Airports in England(ex-South East)	4,358.7	77.6%
Airports in Scotland	1,032.2	18.4%
Airports in Northern Ireland	138.9	2.5%
Airports in Wales	85.3	1.5%
Total	5,615.1	100.0%

F.2 Figure F1 indicates that 86.9% of passengers originating or terminating at Welsh airports fly non-stop to their international destinations. The remaining passengers (13.1%) fly indirectly through other airports, mainly via alternative hubs in the European Economic Area (EEA), with only a small presence of UK gateways in these routes. The same overall picture is drawn for the specific markets linking Wales to the rest of Europe (EEA and non-EEA countries), Africa, and the Middle East¹.

F.3 For the remaining long-haul markets: Asia-Pacific, North America, and Latin America & Caribbean (LAC), no direct connections are available and 100% of the observed itineraries are served via foreign hubs. The same applies to the flights between Wales and the BRIC countries (Brazil, Russia, India, and China). While these markets are indeed very small (less than 1,000 monthly passengers) the results are relevant in that any indirect air connectivity between Wales' own airports and these emerging economies is not provided via the London airport system and is exposed to foreign aviation policies. From the point of view of Welsh residents, the lack of direct connectivity to long-haul destinations may generate the need to transfer by road or rail to London and thus, appropriate services should be made available to ensure that Wales remains well connected with all the world's regions.

F.4 Tables F2 and F3 indicate the top-10 hub choices in each of the geographical markets, measured by the proportion of connecting passengers across all hubs (absolute connectivity indicator: C_i^2). Besides the aforementioned absence of South East airports, the most relevant result is the dominance of Amsterdam as the most important gateway between Wales and the rest of the world (59.5% of connecting passengers). Within the UK, Edinburgh provides access to European destinations, and Newcastle serves a small percentage (6.6%) to the connecting traffic to the Middle East.

¹ All direct connectivity to the Middle East is to Sharm el-Sheikh (Egypt).

² Note that proportions in Tables F2 and F3 are calculated over connecting passengers, while in Figure F1 they are calculated over total passengers. All these proportions are fully equivalent.

PASSENGER ITINERARIES: WALES TO/FROM WORLDWIDE DESTINATIONS (MAY 2013)

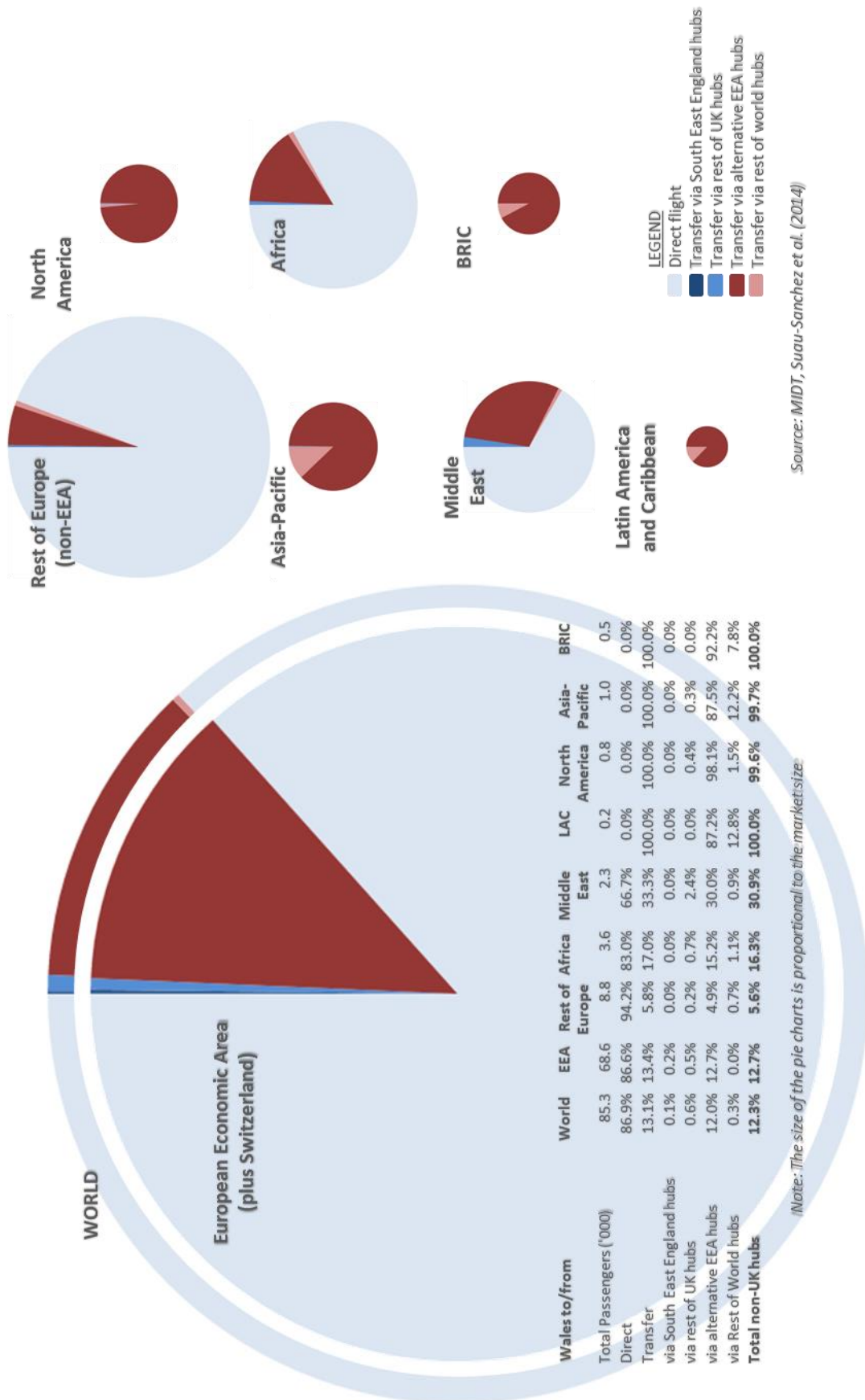


Figure F1. Breakdown of passenger itineraries: Wales to/from worldwide destinations (May 2013)

Table F2. Top 10 hub choices in routes to/from Welsh airports by geographical market (May 2013)

<i>Wales to/from</i>									
<i>World</i>	<i>EEA</i>		<i>Rest of Europe (non-EEA)</i>		<i>Africa</i>		<i>Middle East</i>		
Hub airport	Ci'	Hub airport	Ci'	Hub airport	Ci'	Hub airport	Ci'	Hub airport	Ci'
Amsterdam	59.5%	Amsterdam	49.0%	Amsterdam	71.5%	Amsterdam	63.4%	Amsterdam	83.9%
Dublin	11.1%	Dublin	14.9%	Paris-CDG	7.5%	Brussels	7.5%	Newcastle	6.6%
Paris-CDG	4.7%	Paris-CDG	5.1%	Istanbul Ataturk	5.3%	Dublin	6.4%	Paris-CDG	3.5%
Barcelona	2.6%	Barcelona	3.9%	Istanbul Sabiha	3.8%	Paris-CDG	4.7%	Cairo	1.7%
Ibiza	2.2%	Ibiza	3.4%	Edinburgh	3.2%	Manchester	4.2%	Barcelona	1.0%
Palma de Mallorca	1.8%	Alicante	2.7%	Dublin	2.3%	Algiers	4.1%	Dubai	0.8%
Edinburgh	1.8%	Palma de Mallorca	2.5%	Hannover	1.7%	Palma de Mallorca	4.1%	Istanbul	0.6%
Alicante	1.7%	Edinburgh	2.5%	Dalaman	1.2%	Malta	1.7%	Amman	0.4%
Madrid	1.5%	Madrid	2.3%	Antalya	1.0%	Lusaka	1.3%	Glasgow	0.4%
Dusseldorf	1.1%	Dusseldorf	1.7%	Manchester	0.8%	Entebbe	0.9%	Larnaca	0.4%
Total Passengers	85,270		68,648		8,766		3,604		2,253
Share of total	100%		80.5%		10.3%		4.2%		2.6%
Connecting passengers	11,136		9,183		512		613		751
Connecting rate	13.1%		13.4%		5.8%		17.0%		33.3%
Absolute connectivity:									
via SEE hubs	0.9%		1.4%		0.2%		0.0%		0.0%
via rest of UK hubs	4.9%		3.7%		4.2%		4.2%		7.2%
via alt. EEA hubs	92.0%		94.9%		84.2%		89.4%		90.0%
via Rest of World hubs	2.2%		0.0%		11.4%		6.4%		2.8%
Total non-UK hubs	94.2%		94.9%		95.6%		95.8%		92.8%

Table F3. Top 10 hub choices in routes to/from Welsh airports by geographical market (May 2013)

<i>Wales to/from</i>							
<i>Latin America and Caribbean</i>	<i>North America</i>		<i>Asia-Pacific</i>		<i>BRIC</i>		
Hub airport	Ci'	Hub airport	Ci'	Hub airport	Ci'	Hub airport	Ci'
Amsterdam	72.8%	Amsterdam	82.6%	Amsterdam	86.3%	Amsterdam	85.0%
Paris-CDG	14.4%	Dublin	13.5%	Taipei	4.0%	Paris-CDG	6.7%
Rio de Janeiro	9.9%	Paris-CDG	2.1%	Kuala Lumpur	2.2%	Rio de Janeiro	4.4%
Curacao	2.9%	Atlanta	0.4%	Singapore	2.1%	Beijing	2.4%
-	-	Glasgow	0.4%	Beijing	1.1%	Dublin	0.6%
-	-	New York-JFK	0.4%	Paris-CDG	0.8%	Dalaman	0.4%
-	-	Philadelphia	0.3%	Jakarta	0.7%	Istanbul	0.4%
-	-	Boston	0.1%	Denpasar	0.5%	Kuwait	0.2%
-	-	Detroit	0.1%	Istanbul Ataturk	0.4%	-	-
-	-	Newark	0.1%	Bangkok	0.3%	-	-
Total Passengers	212		768		1,019		498
Share of total	0.2%		0.9%		1.2%		0.6%
Connecting passengers	212		768		1,019		498
Connecting rate	100.0%		100.0%		100.0%		100.0%
Absolute connectivity:							
via SEE hubs	0.0%		0.0%		0.0%		0.0%
via rest of UK hubs	0.0%		0.4%		0.3%		0.0%
via alt. EEA hubs	87.2%		98.1%		87.5%		92.2%
via Rest of World hubs	12.8%		1.5%		12.2%		7.8%
Total non-UK hubs	100.0%		99.6%		99.7%		100.0%

Prepared by:**Pere Suau-Sanchez**

Centre for Air Transport Management, Cranfield University
p.suausanchez@cranfield.ac.uk

**Augusto Voltes-Dorta**

University of Edinburgh Business School
augusto.voltes-dorta@ed.ac.uk

**Héctor Rodríguez-Déniz**

Universidad de Las Palmas de Gran Canaria
hrodriguez@becarios.ulpgc.es

