



Ref: A048613-4  
Email: [nolan.tucker@wyg.com](mailto:nolan.tucker@wyg.com)  
Direct Dial: (0113) 219 2217  
Date: 25/07/13

PLANNING PERMISSION			
To	30/07/13	13	13
29 JUL 2013			
File Number			

**LDF Consultation (Site Allocations Plan)**

Forward Planning  
2 Rossington Street  
Leeds  
LS2 8HD

**BY EMAIL & POST**

Dear Sir or Madam,

**SITE REPRESENTATION TO LEEDS CITY COUNCIL FOR THE ISSUES AND OPTIONS DRAFT OF THE SITE ALLOCATIONS PLAN DPD**

Please find enclosed a copy of our site representation on behalf of Leeds Bradford Airport Limited, in response to the Site and Allocations Plan DPD (Issues and Options) public consultation period.

The indicative layout of the site has been separately attached and is 'Appendix B' in the representation.

Please can you acknowledge receipt of this representation?

Yours faithfully,

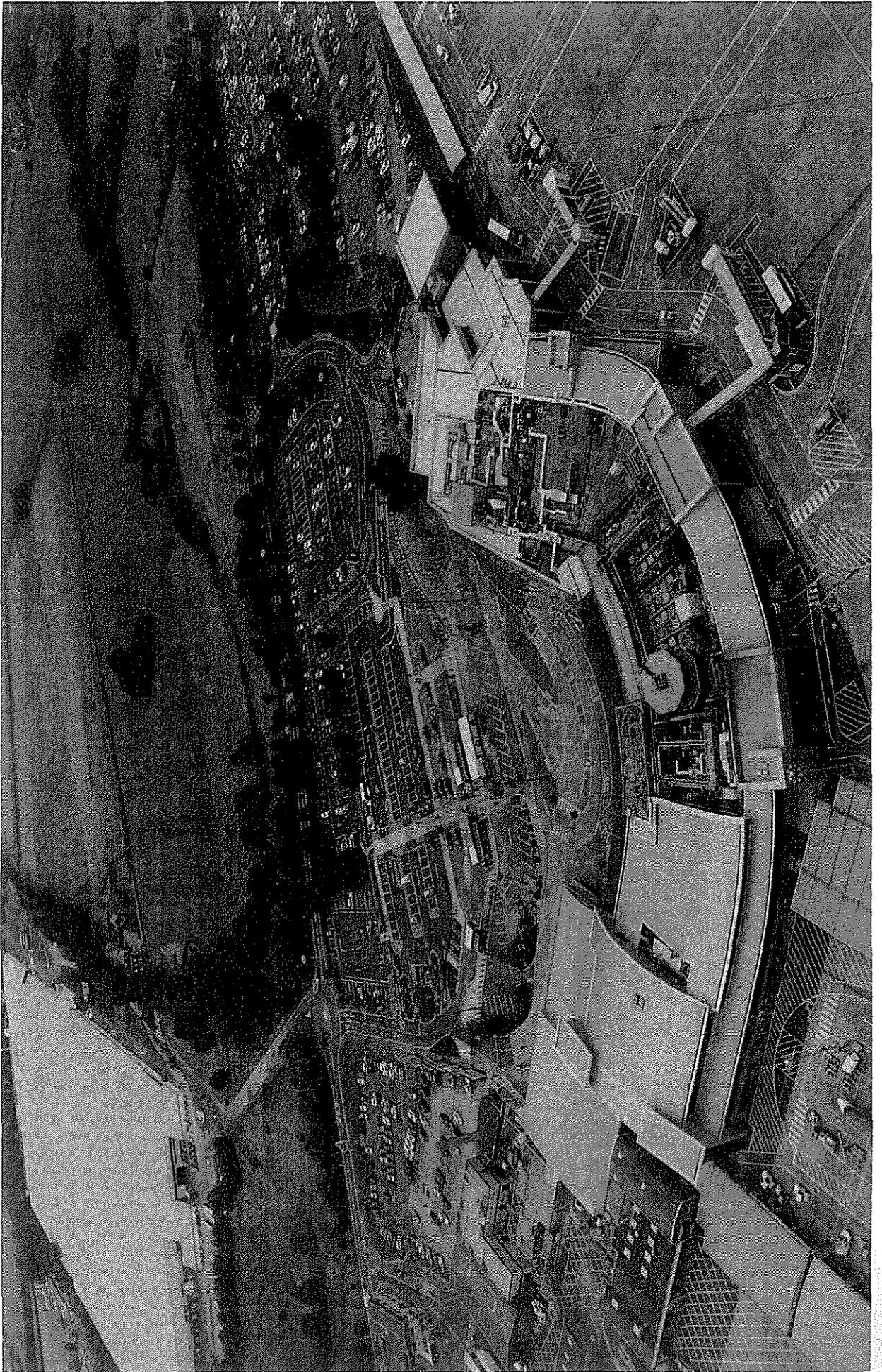
Nolan Tucker  
**Regional Director**  
For and on behalf of WYG

Encs.

# Leeds Bradford International Airport

Economic Hub

August 2013  
Revision A



## Introduction

We have been instructed to make this representation on behalf of Leeds Bradford International Airport (LBIA) in response to the Site Allocations Development Plan Document (DPD), Issues and Options paper. The representation has been structured as follows:

- + National Airport Context
- + LBIA and its Role in the City Region
- + LBIA Growth Potential
- + Airports – Economic Hubs
- + LBIA – Economic Hub
- + Surface Access
- + Site Allocations Policy

## National Airport Context

Until the recent recession, demand for air travel in the UK grew by around 5% per year. The growth in demand for future air travel is forecast to be between 1% and 3% per annum, with a central forecast of UK passenger numbers, taking into account known capacity constraints at UK airports, of 315 million passenger per annum (mppa) in 2030 and 445mppa by 2050.

The Government, through the Aviation Policy Framework (March 2013), recognises the role of airports of different sizes and types, and the need for competition to meet demand for a range of air travel choices and destinations. It suggests that there remains considerable scope for airports other than Heathrow to develop long-haul services to a broader range of destinations to support the UK's international connectivity – through growing point-to-point services or connections to overseas hubs.

### Contact Details

For further information please contact:

#### **Jon Mayor MRICS**

Head of Asset and Development

Leeds Bradford International Airport  
Leeds  
LS19 7TU

e. Jon.Mayor@lbia.co.uk  
t. +44 (0) 844 414 3242  
m. +44 (0)7725 758792

[www.leedsbradfordairport.co.uk](http://www.leedsbradfordairport.co.uk)

Region

Value Added

jobs

Destinations

Passengers per annum



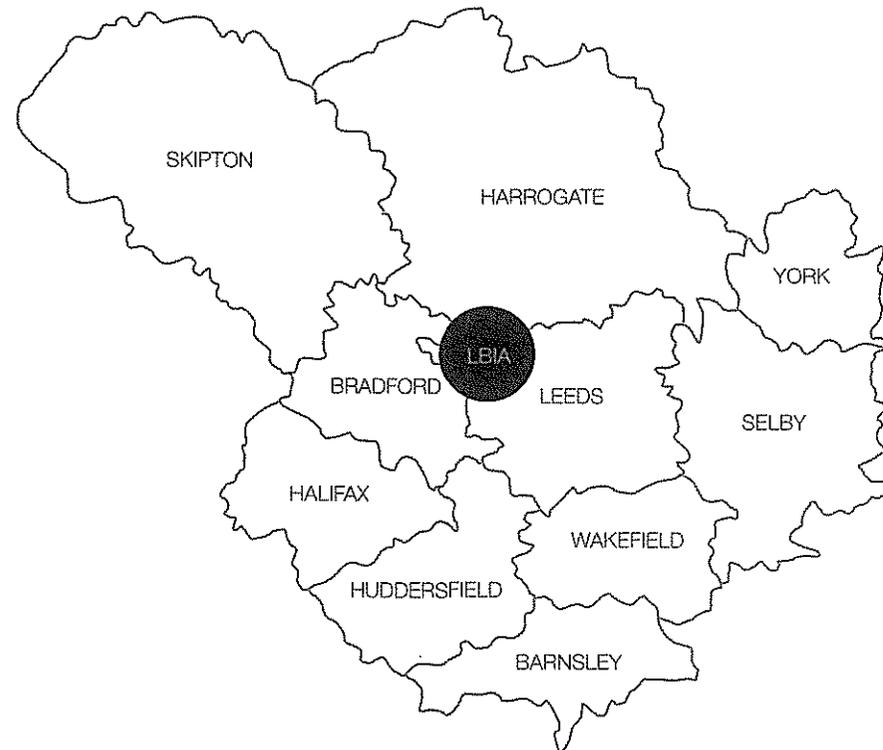
## LBIA and Role in the City Region

LBIA makes a contribution of over £118m gross value added (GVA) to the Leeds City Region (LCR) economy and generates 2,800 direct jobs

It currently provides connections to over 75 destinations including the hubs of Amsterdam Schiphol and London Heathrow, which provide onward connectivity to a wide range of worldwide destinations.

Whilst LBIA is an important economic hub for the City in its own right and important local employment base for Aireborough and the surrounding areas, it also has a much wider strategic role to play in supporting the City Region's key economic sectors, such as business and professional services, bio-medical, digital and advanced manufacturing and delivering improved levels of inward investment and exports.

The growth of these sectors in a highly competitive market are heavily reliant on international connectivity, and LBIA's role in targeted route development to support these sectors will become increasingly important in the future.



## LBIA Growth Potential

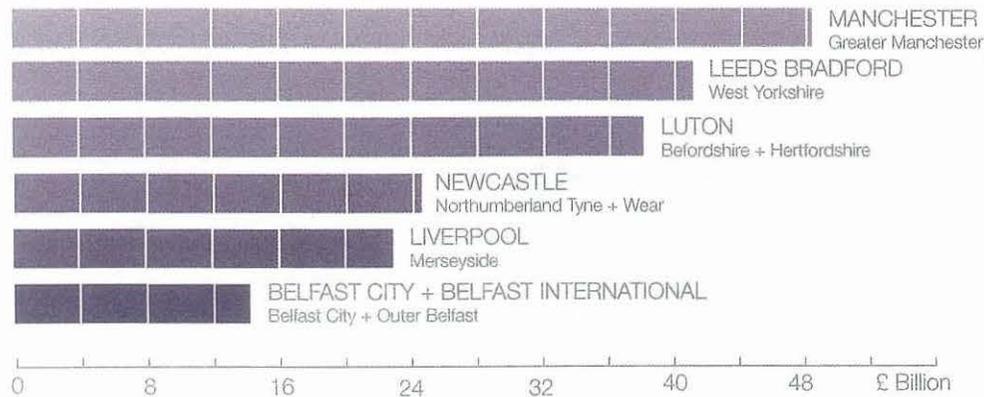
LBIA is a relatively small airport – serving around 3m ppa.

Compared with other City Regions in the UK (and Europe), LBIA, and therefore the wider economic benefits it can lever, is lagging well behind. LBIA is just the 16th largest airport in the UK, much smaller, offering much less connectivity than airports serving

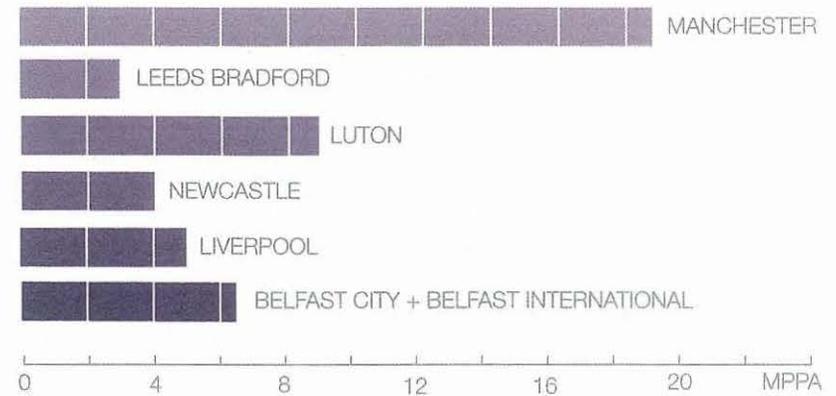
comparator cities such as Newcastle, Birmingham, Liverpool, Edinburgh, Glasgow, Belfast, Manchester, Bristol and so on.

Yet LBIA sits within a very large catchment (greater than 3 million people) in a diverse and strong economic City Region. Its small size is in part explained by Yorkshire suffering from the largest passenger leakage of any region in the UK – 4.5

million passengers each year source their air travel from airports outside the region, 3.5 million of which fly from Manchester.



Gross Value Added (GVA)



Passenger Numbers (millions passengers per annum)

**4.5m** Passengers in the Yorkshire region each year source their air travel from airports outside the region.

**2,430**

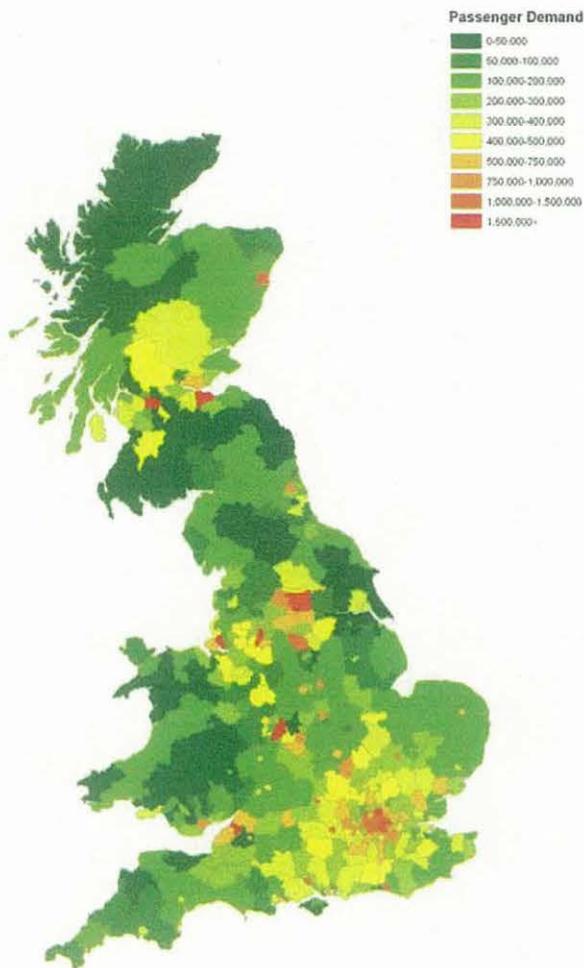
Additional people could be directly employed by the airport, if LBIA grew to 5.6mppa, this growth alone would generate a GVA of

**£191.6m**

## LBIA Growth Potential

The number of passengers  
LBIA could be handling by  
2030 as forecasted by the DfT,  
growth of 114%

# 7.1m



LBIA has performed well over the last five years with a passenger growth of 3.8% compared with other core UK cities and in the local market (Doncaster Sheffield has reduced by 35.5% and East Midlands has reduced by 24.4%). LBIA is continuing to grow and £12 million has been invested in improved terminal facilities in the last year.

The potential for further growth at LBIA is clear and has recently been analysed through a DfT Report; Aviation Forecasts (Jan 13), which considered the growth potential of all the UK's main airports to inform the Aviation Policy Framework and the Davies Commission. It forecasts that LBIA could grow by 114% by 2030, in percentage terms greater than other core city region airports, handling up to 7.1mppa by 2030. The DfT forecasts indicate that LBIA has the potential to be the largest airport in terms of passenger numbers east of the Pennines from Newcastle Airport in the north to East Midlands Airport in the south.

Extract from the DfT report  
'UK Aviation Forecasts', January  
2013

This correlates with the DfT's forecasts in the same report which identifies the highest demand for air travel outside the south east in a concentration around the Leeds and Sheffield City Regions, Hull and the Humber corridor along the A1 through Lincolnshire and Nottinghamshire.

With growth, LBIA's direct and indirect contribution to the City Region would also develop quickly. As a benchmark, a broadly accepted equation is that for every 1mppa:

- + 1,000 direct jobs are created
- + 2,100 indirect/induced jobs supported nationally
- + 1,100 indirect/induced jobs supported regionally
- + 500 indirect/induced jobs supported sub-regionally

If LBIA grew to 5.6mppa, this alone would lead to an additional 2,430 people being directly employed by the airport, generating £191.6m GVA. The wider benefits to the economy in terms of increase in the competitiveness of the City Region, tourist growth, increase in inward investment, and greater export potential, for example, would be very considerable.

The basing of two monarch aircraft at LBIA in 2013 alone generated 200 jobs and securing a link from LBIA to London Heathrow, in addition to the Amsterdam Schiphol route, connects the City Region to a wide choice of world-wide destinations, a competitive advantage that it hasn't previously enjoyed.

## Airports - Economic Hubs



Globalisation and growing demand for air travel mean that 21st Century airports have evolved from transport gateways to much wider economic hubs. The evolution of airports complement city centres, by not only offering a gateway for travel, connecting City Regions together and internationally, but also by providing modern facilities and services that raise the profile of City Regions and create positive first impressions, critical when seeking to attract new inward investment.

A variety of well established airport economic hubs are already functioning across Western Europe, notably in Amsterdam, Frankfurt, Dusseldorf, Copenhagen and more latterly, Manchester. There are a number of common features that distinguish these developments including:

- + The ability to leverage from the Airport core business
- + Significant land assets to provide an "all service" offer including logistics, business space, hotels and ancillary leisure / retail

- + An environment which supports the role of the airport as an economic and transport hub
- + The most successful cities, such as Schiphol, present the management and design of the airport area as a strategically planned whole

Examples of successful and growing airport economic hubs include:

### **Amsterdam**

- + The airport is home to significant industrial and commercial clusters (including aerospace headquarters) and marketing and education centres, including two major science centres
- + 596 businesses are active in the area boasting over 60,000 jobs
- + Home to Citigroup's European HQ

## Airports - Economic Hubs

### Frankfurt

- + 2,152,000 sq ft (200,000m<sup>2</sup>) of office space and two integrated upper scale hotels of 680 bedrooms
- + Further office development of 290,000 sq ft (27,000m<sup>2</sup>) is proposed
- + The Airport supports 500 companies and 75,000 jobs

### Düsseldorf

- + Conferencing and events are key elements of the airport hub
- + 230 businesses located in the immediate vicinity of the Airport

### Munich

- + Built in the early 1990s, Munich Airport Centre provides shopping, dining, and business services to both air travellers and the local community
- + A substantial office development is proposed and under construction of 226,000 sq ft (21,000 m<sup>2</sup>)
- + At the heart of the development is the S-Bahn electric rail system

connecting the airport to Munich city centre and beyond

### Copenhagen

- + Copenhagen has invested strongly in infrastructure and transport facilities to ensure the cargo strategy can be implemented
- + Proposal to develop 750,000 sq ft (70,000m<sup>2</sup>) of offices and up to 2,370,000 sq ft (220,000 m<sup>2</sup>) of distribution and production space to create 'Cargo City'

### Manchester

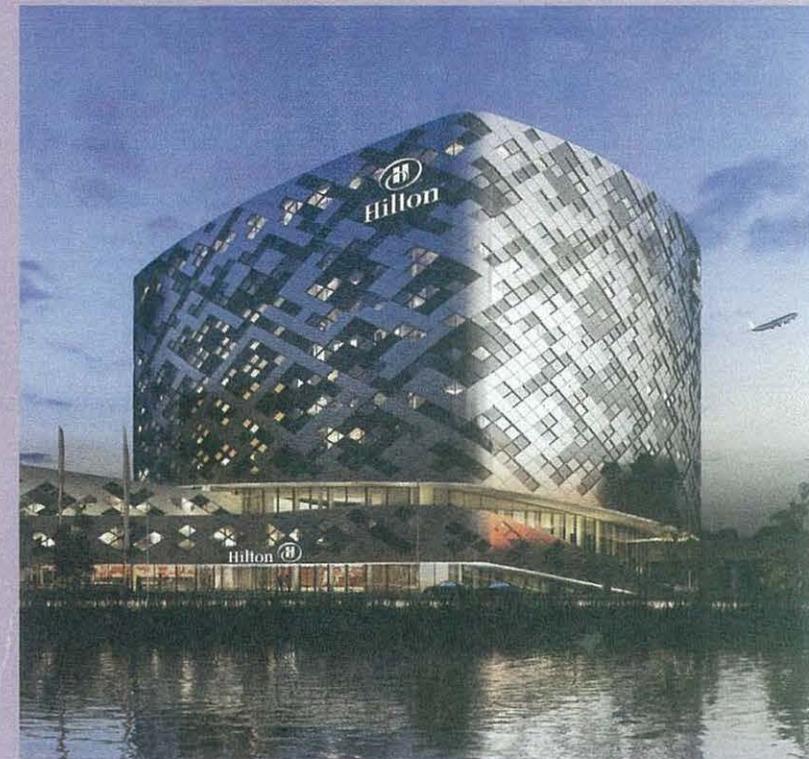
- + Manchester Airport City seeks to be a world class sustainable location for global businesses
- + It will comprise 4 – 5 million sq ft of quality business space over a 10-15 year period including: manufacturing and logistics accommodation, Grade A offices, hotels, retail and leisure facilities across 138 acres (56 hectares) of land adjacent to Manchester Airport

There are also many examples of airport economic hubs on a much smaller scale, such as Exeter Airport, which is seeking to attract high quality, skilled employment through the provision of key infrastructure and development opportunities, including a new business park, 'Exeter Sky Park'

Whilst there are some common features of airport hubs, they do all operate at different scales, and have different focuses of activity. Those that have been most successful have planned their level and range of facilities and services to support and complement the City and City Regions in which they sit, in order to maximise their impact and opportunities for economic growth well beyond the airport's boundaries



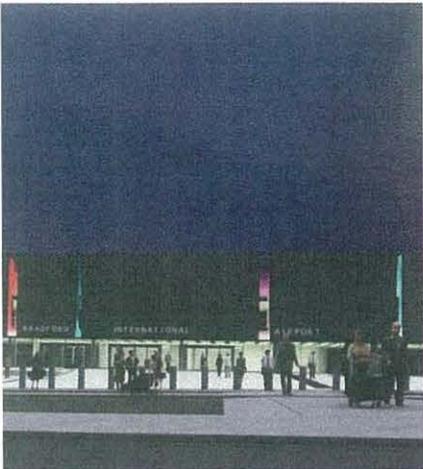
Schiphol Amsterdam: overview



Schiphol Amsterdam: Hilton Hotel

## LBIA - Economic Hub

The potential exists for LBIA to grow significantly over the next 10-15 years, how that growth is delivered and whether the opportunities that it will present are taken, will influence the scale of the contribution LBIA will make to the local area, and the wider City and City Region.



To accommodate significant levels of passenger growth in the order forecast by DfT in their report, Aviation Forecasts (2013), will require a considerable investment in airside infrastructure. This will include new stands, reconfigured taxiways, baggage facilities, utilities etc. The timing and scale of new facilities will be influenced not just by the scale of growth but the pattern of growth i.e. whether demand continues to increase in peak periods or spreads out through an average day. An ambitious route development strategy will not however require an extension to the airport's runway and it's anticipated that all airside needs will be accommodated within current airport boundaries. The assessment work and delivery plan is contained in the airport's new masterplan, which will be subject to consultation in the autumn.

To match this investment in airside facilities, there is an opportunity for the airport to raise the profile and perception of the City and City Region through the creation of a much improved 'offer' – new airport facilities landside together with

a wider hub of economic activity serviced by an efficient and modern surface access system. This would create opportunities for employment and attract inward investment that is currently leaking to other City Regions, but critically would also create a positive first impression to any visitor coming to the City – creating a profile and image of a key worldwide gateway that you would expect to see in a successful and vibrant City and City Region.

LBIA has been engaging with the local authorities in the LCR and a range of other stakeholders on the future role of the airport to support the City and City Region's ambitions. This includes the preparation of an aviation strategy paper to generate a discussion on the potential of the airport, the key considerations moving forward, and the options for growth that it presents. Key issues raised to date have included ensuring that the airport's route development plan focuses on destinations that support the LCR's key economic sectors, including traditional markets in the key capital cities of Europe and North America, and provide access

to growing markets, for example South America through Madrid and the Far East and China through Dubai.

In addition, there is support for improving facilities and services at the airport, including surface access so that the airport can better perform its function as a key gateway. This work is being fed directly into the development of the airport masterplan and surface access strategy and is subject to ongoing discussion with Leeds City Council and other partners.

From the analysis undertaken by LBIA, it is considered that the creation of a wider economic hub well established at airports of all scales across the UK and abroad, represents the most effective way of developing the airport and maximising its potential for the City Region. This requires co-ordinated efforts across all partners to define the strategy, deliver the land, attract the investment, and secure significant improvements in surface access infrastructure.



## Developing the Hub



The development of LBIA as a wider economic hub of activity, combined with much improved surface access, has the potential to be a key driver for the Yorkshire economy; increasing investment, jobs, productivity and accessibility.

The key objectives of developing LBIA as a wider economic hub would be to:

- + Raise the profile of the City and City Region through a modern high quality development, but one that also responds positively to the distinctiveness of its location
- + Support airport growth and improved international connectivity for the City Region to meet its economic objectives, including growing exports
- + Maximise opportunities for attracting inward investment into the City Region and retain and attract highly skilled individuals
- + Support future growth plans and the economic and social prosperity of the City Region, including local growth initiatives in North Leeds
- + Deliver improved surface access, not only to the airport, but crucially the opportunity the airport's location presents to provide much improved

connectivity between the City Region's main settlements.

As the airport grows and surface access improves, there will be opportunities for directly supporting the growth of businesses indigenous to the Leeds City Region and attracting businesses to the airport that are highly dependent on international connectivity which would not otherwise locate in the City Region, including:

- + Higher order corporate functions such as R&D, headquarters, sales and marketing, training and development
- + High growth or high technology industries
- + High profile consumer and business supply brands
- + Airport logistics service providers
- + Operators whose activities grow in parallel with passenger and cargo volumes, including accommodation for airlines

Business services growth in the UK between 2011 and 2020 is forecast to be 3.68% per annum (source: Oxford Economics) - the highest of any country in Western Europe. This will drive major growth with the key market drivers of demand including:

- + Demographics – highly accessible locations which can maximise capture rates, improving staff retention, key hires and widen the recruitment catchment area
- + Sustainability – with an increasing focus on reducing energy costs and hitting carbon reduction targets
- + Operationally – the flexibility of buildings and floorplate is essential to maximise occupancy levels and improve the interaction of staff
- + Financial – more efficient and effective staff lowers occupational costs, which in the current economic climate, is essential for occupiers
- + Technology – development of infrastructure and increasing

connectivity is essential for occupiers

Developing LBIA as a wider economic hub provides an opportunity that does not exist in the City or Region at present designed to appeal to occupiers such as those:

- + Undertaking higher order corporate functions such as international, national or regional HQs, sales and marketing, which value high levels of accessibility and brand
- + Users that have a preference for non-city centre locations but are increasingly demanding additional services, amenity and profile which enable them to successfully compete for and retain quality staff
- + Multi-national organisations, including new inward investors, particularly those in the high growth industry sectors that perceive benefit from physical prominence to the high volumes of airport traffic

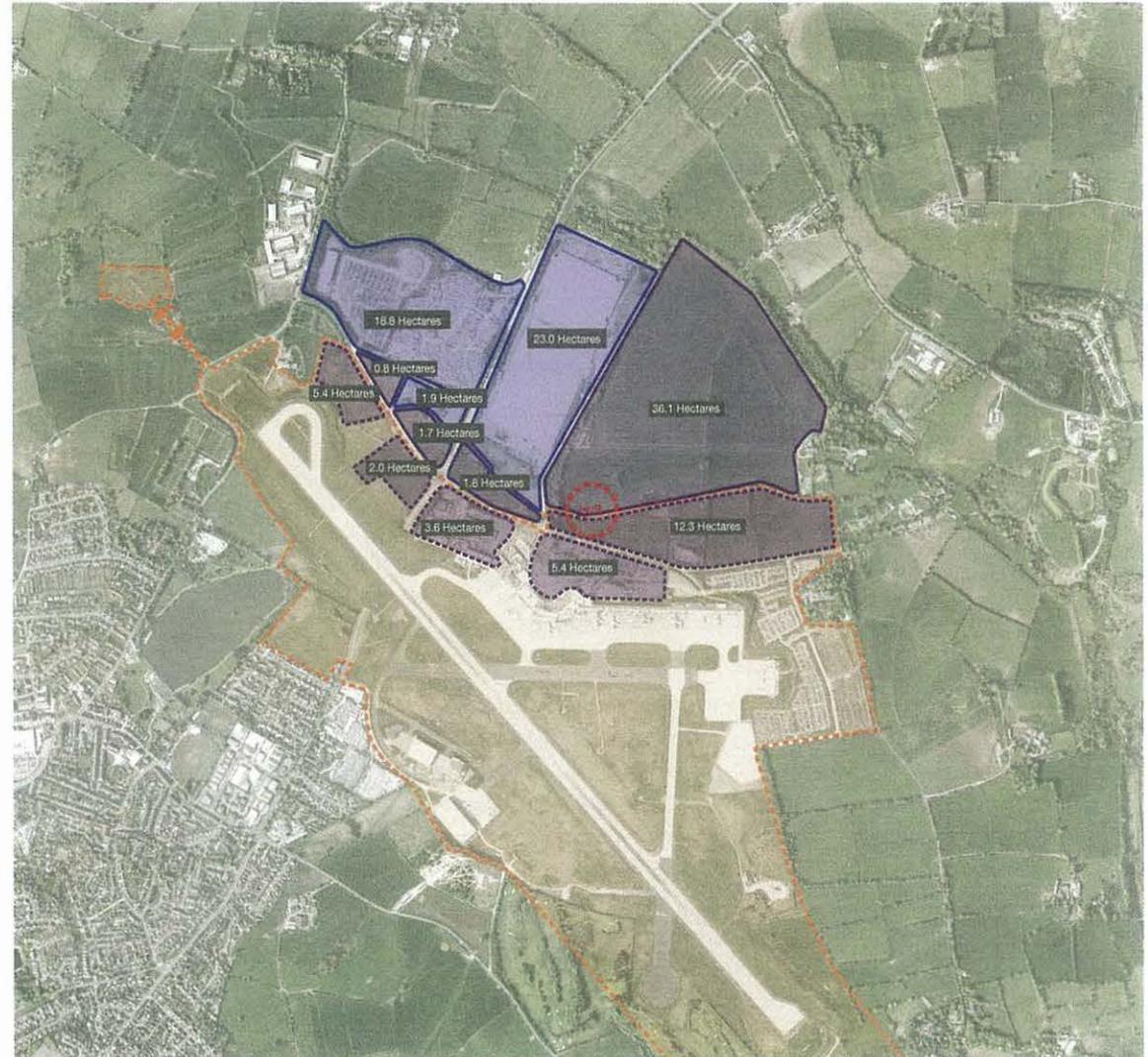
## Developing the Hub

There is already evidence that these key locational drivers place airports in a unique position when major corporates are deciding upon their investment location. The most successful Airport developments within Europe, e.g., Amsterdam and Frankfurt, have already attracted over 500 companies including the likes of L'Oreal, Sony, Dell, AstraZeneca, Oracle, Coca Cola and Proctor & Gamble.

There is also a role for the development of logistics space at LBIA focused on small, high value goods. This will be divided into three categories: Tier 1 cargo handlers requiring transit sheds within the airport perimeter; Tier 2 operators such as freight forwarders who will require space within the airport perimeter or very close to the operational facilities and Tier 3 operators such as logistic service providers.

The provision of additional logistics space will be vital to LBIA's ability to meet evolving demand for space from:

- + Operators whose activities grow in parallel with cargo volumes
- + Integrators who require locations on the airport apron
- + Freight forwarders who require close connectivity to operators;
- + Airport logistics service providers
- + International freight and logistics companies combining different activities in one location



## Developing the Hub

Yorkshire has benefited from an expanding conference and events industry in recent years, which has had a positive impact on international arrivals and bed nights. New hotel accommodation at LBIA will:

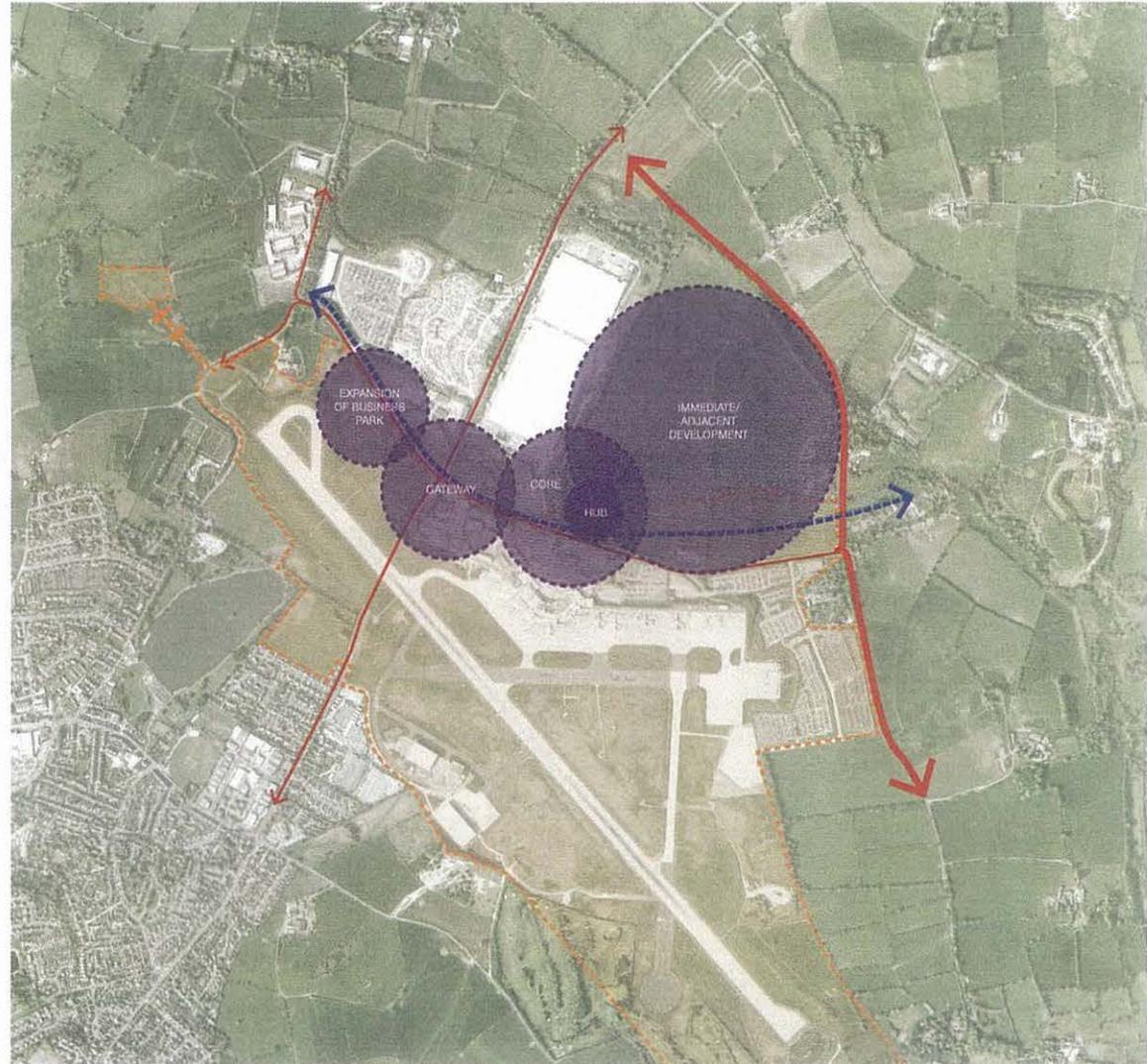
- + Support the needs of new and existing business occupiers
- + Should complement rather than compete with city centres. It should service business occupiers as well as customers from the region, focused on single day or shorter events where there is less compulsion to choose the city centre environment

Furthermore, LBIA operates not just on a strategic scale, but as a large employer of local people. Through its wider development, there would also be an opportunity to provide flexible space to meet the needs of start up and developing companies in the local area. The potential exists for LBIA to provide the right environment for a hub of activity that not only serves national and international businesses but provides an opportunity for supporting and

fostering a cluster of dynamic new businesses.

The development of LBIA as an economic hub requires co-ordination of strategies across planning, transport and economic spheres and significant airside and landside investment, including surface access. Collaboration between the airport and key partners in the City Region is critical and will determine its success. The impact of developing a successful and vibrant airport in the City Region would be of transformational significance, generating significant local and regional growth and prosperity. The proposals would be a game-changer for the City Region.

They will be developed through the airport's masterplan and surface access strategy and in parallel with the City's emerging Site Allocations DPD.



## Surface Access

Effective surface access is an important element in the development of airports as wider economic hubs.



However, there is no direct relationship between surface access infrastructure and airport size.

The type and level of infrastructure provided is more related to the role of airports as gateways rather than linked to passenger numbers or a specific output.

Unlike other transport modes, the air transport industry pays for its own infrastructure costs (predominantly runways, airport terminals, and air traffic control), rather than these being financed through taxation and public investment or subsidy (as is typically the case for road and railways). But the supporting infrastructure needs to be delivered through a collaborative effort, understanding the critical role that an airport plays in 'selling' its City Region.

Surface access is a particularly important element of creating a new and broader economic hub at LBIA. The airport is currently serviced

by regular bus connections from Bradford, Leeds and Harrogate. LBIA continues to invest in supporting and promoting these services, which overall have seen increases in patronage every year for the last three years, which is a significant achievement, particularly in light of reductions in bus patronage across the city as a whole. The airport's public bus modal share is at approximately 7% (measured annually and most recently in August 2012).

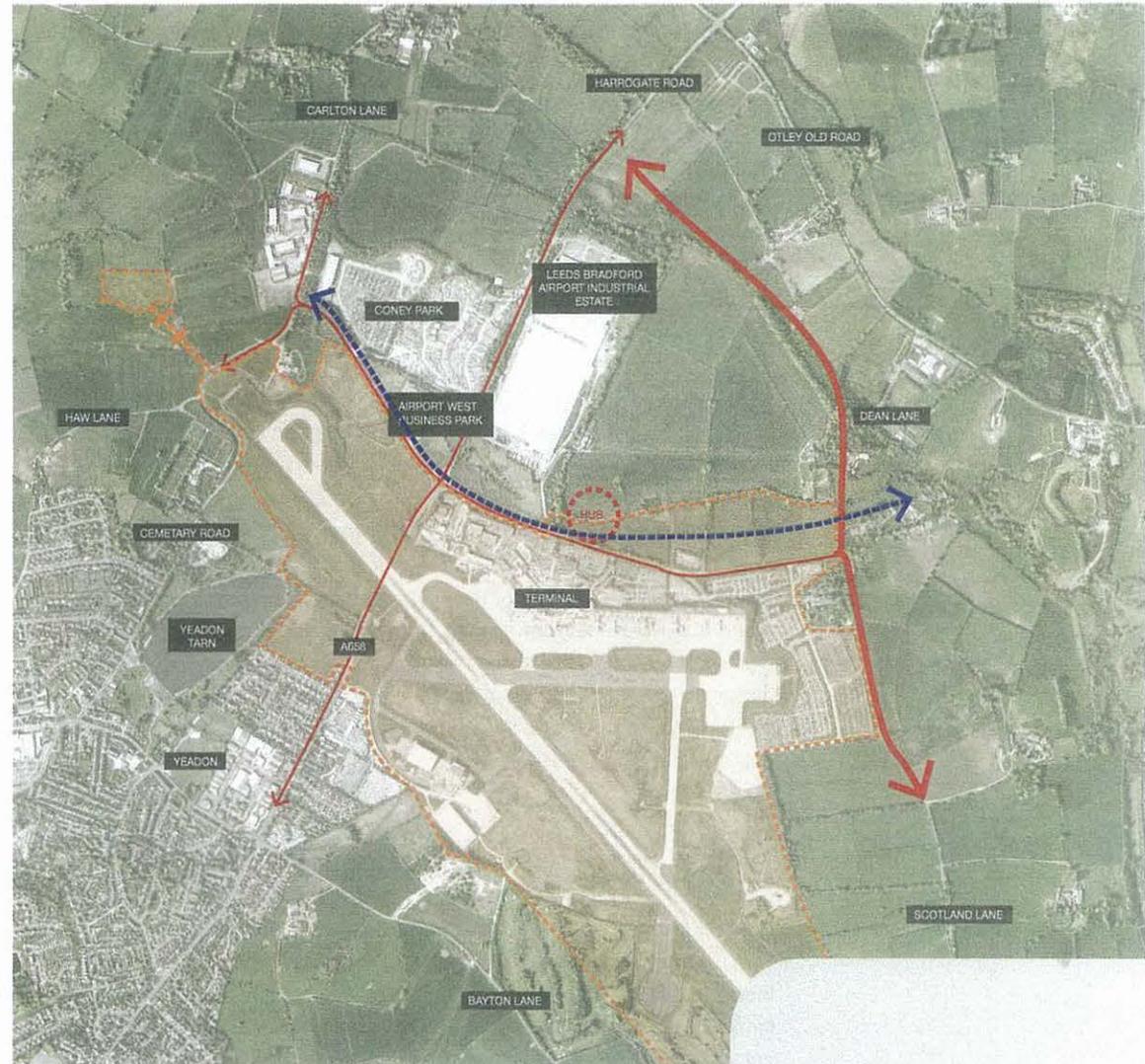
Short term opportunities exist to improve the bus service offer, promote the services more effectively, and increase frequencies. Improved connectivity to local railway stations and better promotion of through ticketing is also necessary. However, in order to more effectively connect the airport to the cities that it serves, significant investment is required through a new road and in particular a new rail link.

## Surface Access

The West Yorkshire Transport Fund has committed to delivering a new road link, connecting the Outer Leeds Ring Road at Horsforth with the A658, a short distance to the west of Bramhope. This is very much welcomed and will provide an important improvement in surface access and define well the northern extent of wider commercial operations that may be attracted to the airport on the opposite side of Whitehouse Lane. Recent route development announcements in particular the BA connection to Heathrow and subsequent increases in passenger numbers illustrate that the airport can and is growing quickly. Early investment in surface access would complement and drive this growth forward and the development of a new road link should be considered, and is deliverable, in a relatively short time frame. The Site Allocations DPD should safeguard the route and reflect the opportunity it presents.

Following Danny Alexander's MP speech on 8th July, the Government is committed to supporting the development of improved surface access at Lbia. A wide range of options for creating a new rail link from Bradford and Leeds have already been considered at a high level through the West Yorkshire Transport Fund, and this provides an opportunity for further refinement of these options and the development of a business case. Delivering a rail link to the airport, through which better connecting the city region's key cities, would make a very considerable difference to the economic vitality of the LCR. Its potential should be planned for through the Site Allocations DPD.

-  Operational Area
-  Existing Road Network
-  Potential New Road Link
-  Potential New Rail Link



## Site Allocations Policy

For the airport to deliver on its potential, a co-ordinated approach is needed to planning, transport and economic strategies. It is critical that the right environment for growth is developed now through appropriate planning policy which provides the flexibility to deliver as the airport develops over the next 10 years and more.

We welcome the council's initial thoughts on the potential for developing a wider hub of economic activities at the airport, and there is the opportunity to be ambitious and set out a clear framework to capitalise on the benefits the growth of the airport could bring to help the City and City Region deliver its key economic objectives.

The vast majority of the land identified in the Site Allocations Issues and Options draft as locations for employment development is already in use, some for airport related development, or employment use. It is therefore difficult to see how much of this land will assist in creating the high quality mixed use gateway to the airport that is required if it's to meet modern expectations, raise the profile of the City, and attract new inward investment.

The largest area identified for employment use is the Sentinel site, however it accommodates 2,000 airport car parking spaces and whilst there remains an extant permission for other development, there appears not to be any intent to redevelop the

site and there is no reason to expect that position to change in the future. Furthermore, it is some distance from the airport, and there are other locations closer to the airport where commercial development should take place first, much better related to the existing airport operations and current and proposed surface access connections.

The Avro site is also identified for employment use, but the site is covered by one building and associated space used primarily for storage and distribution purposes. There will no doubt continue to be a market for the building, but it won't satisfy the range of business needs, such as offices and hotels that you would expect to be attracted to a growing airport.

Whilst not dismissing the role that existing employment sites may play, the opportunity to develop a new airport hub requires a much broader review of the land assets around the airport, in order to provide the right planning environment to secure new development that is integrated with the airport and future

surface access improvements and supports the objective of creating a successful and vibrant airport hub. The architectural drawings included in the representations set out some thoughts on how this could come forward.

LBIA welcome the opportunity to continue to work closely with the City Council and key stakeholders in the region and local communities in developing that opportunity and in doing so ensuring that planning, economic, and transport policy and strategy is fully aligned and supportive.



