

Route to 2030

Strategic Development Plan



Leeds Bradford
Airport

Leeds Bradford Airport: Achievements and Objectives

Leeds Bradford Airport contributes:

- **£336m** to the local economy;
- Delivers over **2,000** direct jobs, with the great majority of employees living within an hour of the airport.
- The airport has performed well over recent years, outstripping the percentage growth of many other UK airports
- **3.3m** passengers now passing through the airport each year, representing a **27%** increase in numbers since **2005**.
- There is strong potential for further sustainable growth.
- Leeds Bradford Airport is located within the largest catchment of any other UK airport outside London, with a regional population growing faster than the UK average.
- Passenger numbers could increase from **3.3m** per year to **7.1m** per year by **2030**.
- This level of growth is achievable within the existing airport boundary and without the need for an extension to the runway.



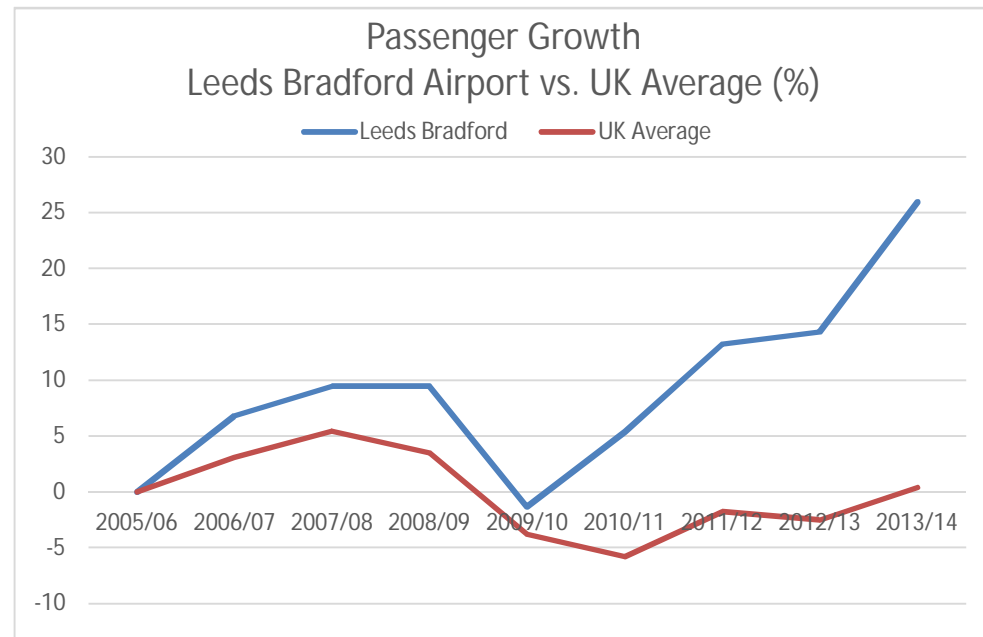
100,000
Passengers fly from LBA
every week



Generates **2,050 direct jobs** and
supports a further **300 jobs**

Leeds Bradford Airport: National Role

- LBIA serves 60 international scheduled, 7 domestic scheduled and 12 charter destinations
- LBIA has introduced 5 new airlines and 25 new routes in the last 3 years
- British Airways reintroduced flights to London in 2012 providing worldwide connectivity to over 150 destinations flying via Heathrow, supporting regional businesses and raising the profile of Yorkshire on the world's stage
- In 2013 Monarch Airlines has introduced a new base at the airport generating 200 jobs, operating to 13 European destinations
- Access to North America was enhanced in 2014 through the introduction of connection to Dublin with Aer Lingus



The graph above shows total passenger movements between 2005 and 2013/14, demonstrating LBIA's success.

Leeds Bradford Airport: Regional Role

- The economic competitiveness of the Leeds City Region is linked to the sustainable growth of LBIA.
- LBIA is already a major asset for the Leeds City Region, and it has the potential to contribute much more.
- Strategic leadership for the economic growth of the Leeds City Region is spearheaded by the Local Enterprise Partnership (LEP).
- The LEP's Strategic Economic Plan (2014) represents the long term vision for the City Region economy. The Plan seeks to achieve stronger growth and prosperity, creating a further £5.2bn in economic output and an additional 62,000 jobs.
- By 2021, the City Region will be almost a quarter bigger and will have almost 10% more jobs (Strategic Economic Plan, 2014).



Leeds Bradford Airport: Local Role

- LBIA annually provides over £336m GVA to the City Region. The introduction of British Airways services is delivering a further £10m GVA annually
- LBIA provides over 2,700 jobs on site and is one of the largest employers in West Yorkshire
- 44 businesses are based at LBIA and the airport supports local employment with 83% of its staff living within a 10 mile radius (Leeds 58% and Bradford 25%)
- LBIA is helping to support the City Region's key economic growth objectives, alongside creating and delivering new jobs in the community



Leeds Bradford Airport: Masterplan



- **The Aviation Policy Framework (March 2013), reiterated the need for UK airports to produce 'Masterplans' to communicate their plans for development to stakeholders.**
- **In response, LBIA have produced a Draft Strategic Development Plan, The 'Route to 2030' for discussion with all stakeholders and interested parties.**

Where is the Potential for Growth?

- Department for Transport projections indicate LBIA is projected to grow from 3.3 million passengers per annum to **7.1 million passengers per annum by 2030**, representing a **115% increase** on current numbers
- In order to reach this potential, our growth strategy is focused on four clear objectives:
 1. **Meeting Demand for Air Travel in our Region**
 2. **Delivering a Great Service**
 3. **Improved Transport Links**
 4. **Expanding Employment Opportunities**

Objective 1: Meeting Demand for Air Travel in our Region

Business

- Leeds City Region is home to the largest employment centre for manufacturing in the UK and biggest financial services employer outside of London;
- It is vital the business community recognise the need for further development of the airport to support economic growth

Inbound Tourism

- Tourism industry is the UK's fifth largest export earner, generating £24bn per annum
- LBIA brings an estimated 230,000 visitors to the Leeds City Region

Outbound Tourism

- 73% of passengers use LBIA for outbound tourism and leisure purposes
- LBIA will target the expansion of the range of destinations to facilitate further growth.



Objective 2: Delivering a Great Service

Passenger Terminal

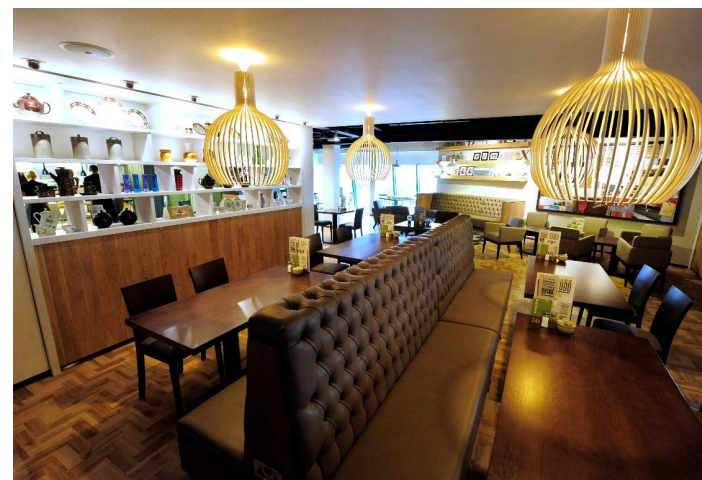
- The extension of the terminal building remains a key objective to meet future passenger and operational requirements.
- Additional departure gates will be added from summer 2015.

Runway, Taxiways and Aircraft Parking

- LBIA will target additional Air Transport Movements during 'quiet' periods (i.e. spreading the peak);
- Enhancements to the existing taxiway infrastructure will be required to maintain efficiency of operational performance;
- To better manage its aircraft parking areas, LBA will introduce simplified apron layouts, making maximum use of existing infrastructure (up to 2030).

Technology

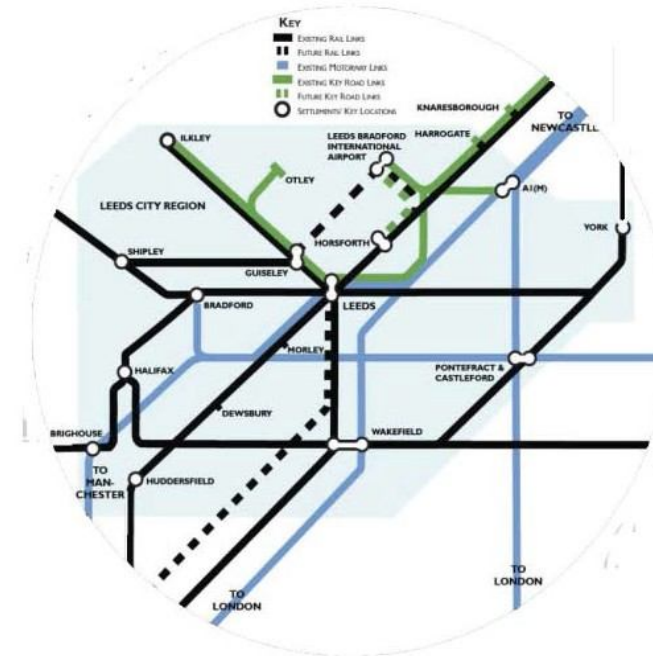
- New technologies at LBIA include: Self check-in and automated bag drop, reducing check-in and queuing time; and new security equipment increasing throughput, reducing queuing while maintaining passenger safety.
- Technological advances in online bookings and smart ticketing gives a more seamless and effortless journey and open up the airport to new business.



Objective 3: Improved Transport Links

Short Term (up to 2018)

- Continue feasibility and design work into the new road and rail links;
- Work in partnership with bus operators and Councils to identify further improvements in bus services;
- Improve marketing and ticketing for public transport offer;
- Provide a journey planning link on the airport website;
- Develop a strategy for improving walking and cycling access;
- Provide new on-site long stay car parking areas; and
- Incentivise staff to make more sustainable travel choices.



Leeds City Region Surface Access

A new road link to LBIA is to be completed by 2021, supported by the Local Enterprise Partnership, the West Yorkshire Combined Authority and One North.

Objective 3: Improved Transport Links

Medium Term (Up to 2025)

- Deliver the first phase of new highway link to the airport;
- Consider opportunities to link with Park & Ride sites;
- Develop an Airport Cycle Centre; and
- Continue to work with the Combined Authority to ensure a coherent and effective bus network.



Local Surface Access

LBIA sits at the heart of the Leeds city region and needs to serve all that is has to offer.

Objective 3: Improved Transport Links

Long Term (Beyond 2025)

- Deliver any further phases of the new highway link;
- Deliver the first phase of the new rail link to the airport; and
- Provide new on-site long stay to satisfy anticipated demand.



City Region Access Strategy

Public transport accessibility from West Yorkshire districts is poor, but can be improved through investment.

Objective 4: Expanding Employment Opportunities (Commercial Hub Vision)

Vision

- Creating a commercial growth hub at Leeds Bradford Airport is important to the future development and expansion of the Leeds City Region economy. Specifically, it will:
 - Support the growth of the airport as a key piece of strategic infrastructure in the local economy;
 - Enhance the portfolio of land and premises available to prospective occupiers and investors; and
 - Enable the creation of substantial net additional jobs, investment and tax revenues to Leeds City Region.
- The commercial hub will create a high quality well connected mixed use development zone that provides a focus for enterprise and innovation related to the airport. It is envisaged the hub will provide:
 - Air Innovation Park;
 - Airport Village; and
 - Air Freight Park.

Airport	Commercial land development pipeline of over 25 hectares
Leeds Bradford	X
Newcastle	✓
East Midlands	✓
Liverpool	✓
Manchester	✓
Newquay	✓
Birmingham	✓
Inverness	✓
Dusseldorf	✓

Objective 4: Expanding Employment Opportunities (Commercial Hub Delivery)

Delivery

- 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.
- 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 Core Strategy Development Plan document recognises that LBIA is a “*major part of the strategic Infrastructure for the City Region and that it is also an economic resource for employment, business development and tourism*”. It acknowledges that the airport’s economic benefits stem beyond just the airport site across the wider City Region and that there is potential for growth in terms of passenger numbers and freight.
- The Core Strategy also acknowledges that there is ongoing work currently being undertaken by the airport to define its longer term aspirations, as part of the Airport’s Masterplan.
- The airport and its partners are examining the mechanisms by which the vision could be delivered, which could include the creation of a ‘mini enterprise zone’.



Objective 4: Expanding Employment Opportunities (Commercial Hub Benefits)

Benefits

- The development and expansion of the commercial hub at the airport will generate substantial net additional jobs, investment and tax revenues for Leeds City Region. The analysis in the DTZ report indicates the potential for:
- Net additional job hosting capacity of development 5,500 jobs;
- GVA contribution to the local economy £2.6bn-£3.3bn based on job hosting capacity over 25 year period;
- Business rate income for Leeds City Council assuming 50% retention over 25 year period £20-23million.



Next Steps...

City Region support for identifying LBIA as an Enterprise Zone and establish and facilitate a delivery mechanism to stimulate inward investment at LBIA .

Establish a delivery plan for Rail and Road access. There is an opportunity to deliver both. It requires a partnership between the LEP, Local Authorities in the City Region and LBIA now.

City Region support for route development campaign to improve penetration of the mainland European Market, consistent with the City region's economic objectives.

Agree a planning strategy for expanding the airport as an economic hub in the Leeds Site Allocations DPD—providing the gateway facilities and commercial development opportunities to retain and attract investment to the region, generate new jobs and play a key role in supporting proposals for improved surface access.