

Liverpool John Lennon Airport Our Journey to 2030



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1. Introduction

Liverpool John Lennon Airport (LJLA) is one of the UK's major regional airports and plays an important role both as an international gateway, and a major driver of the local economy. As such, LJLA is of strategic importance to the future success of the Liverpool City Region and the UK economy.

The Airport is a major local employer in its own right, and through its supply chain. It enhances the competitiveness of business across the region by providing access to international markets, and supporting inbound travel. Recent analysis highlights that the Airport supports around 6,000 jobs and contributes around £250m in GVA to the Liverpool City Region economy.

The presence of a thriving and growing airport is a valuable asset for the Liverpool City Region (LCR), the North West, and North Wales and complements the other international gateways in the North, providing passengers with choice and competition. More locally, the continued development of the Airport has also been a catalyst for the regeneration of South Liverpool.

There is still more to do and the Airport has the potential to further enhance its economic and social impact across the region. This document summarises the Airports Strategic Vision and Master Plan and sets out LJLA's offer to collaborate with key stakeholders across the region to help realise the Airport's potential, maximise its benefits, and to become the Airport the region loves.

Proud of what we've achieved to date...

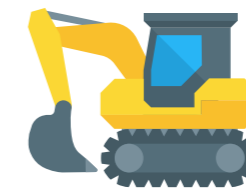


86%
of flights leave ontime - in the top 10 globally

5 million
passengers handled annually



Development of the Airport has also been a **catalyst for the regeneration** of South Liverpool.



£250m
in GVA to the Liverpool City Region economy



6,000
jobs supported by the airport

Connected to over **60 destinations** providing passengers with choice and competition



2. Supporting Regional Growth

LJLA is an international gateway, handling 5 million passengers in 2017. It provides connectivity to European markets for the LCR, the North West and North Wales. It provides regular services to over 60 destinations across the UK and Europe.

This connectivity is vital for the visitor economy and the success of many businesses within the LCR, and adds to the quality of life of residents.

LJLA attracts a high proportion of inbound passengers (38% of total passengers) compared to other UK regional airports. Almost two thirds of these inbound passengers are international and as such, LJLA plays a critical role in supporting tourism and the visitor economy. For the Airport's non-Mediterranean flights, this percentage increases to over 50%, demonstrating the importance of the Airport to the region's visitor economy.

Approximately 10% of all LJLA passengers are travelling on business, highlighting the commercial role that the Airport plays in supporting the economy of the LCR.

LJLA is a significant economic asset in its own right. The Airport is a major employer with approximately 1,800 jobs currently supported on site, generating around £85 million direct GVA every year. In addition, in 2016, the Airport supported approximately £250 million in GVA and 6,000 jobs across the LCR.

'For every 1 million passengers this equates to 1,400 jobs supported and £58 million GVA per annum within LCR.'

LJLA has been investing to create a "best in class" passenger experience at the Airport and to provide a 'Faster, Easier, Friendlier' experience. The Airport has seen in the region of £150m invested in the last twenty years, and in recent years £6m has been invested specifically on refreshing the passenger experience and enhancing the retail and food offering in the terminal.

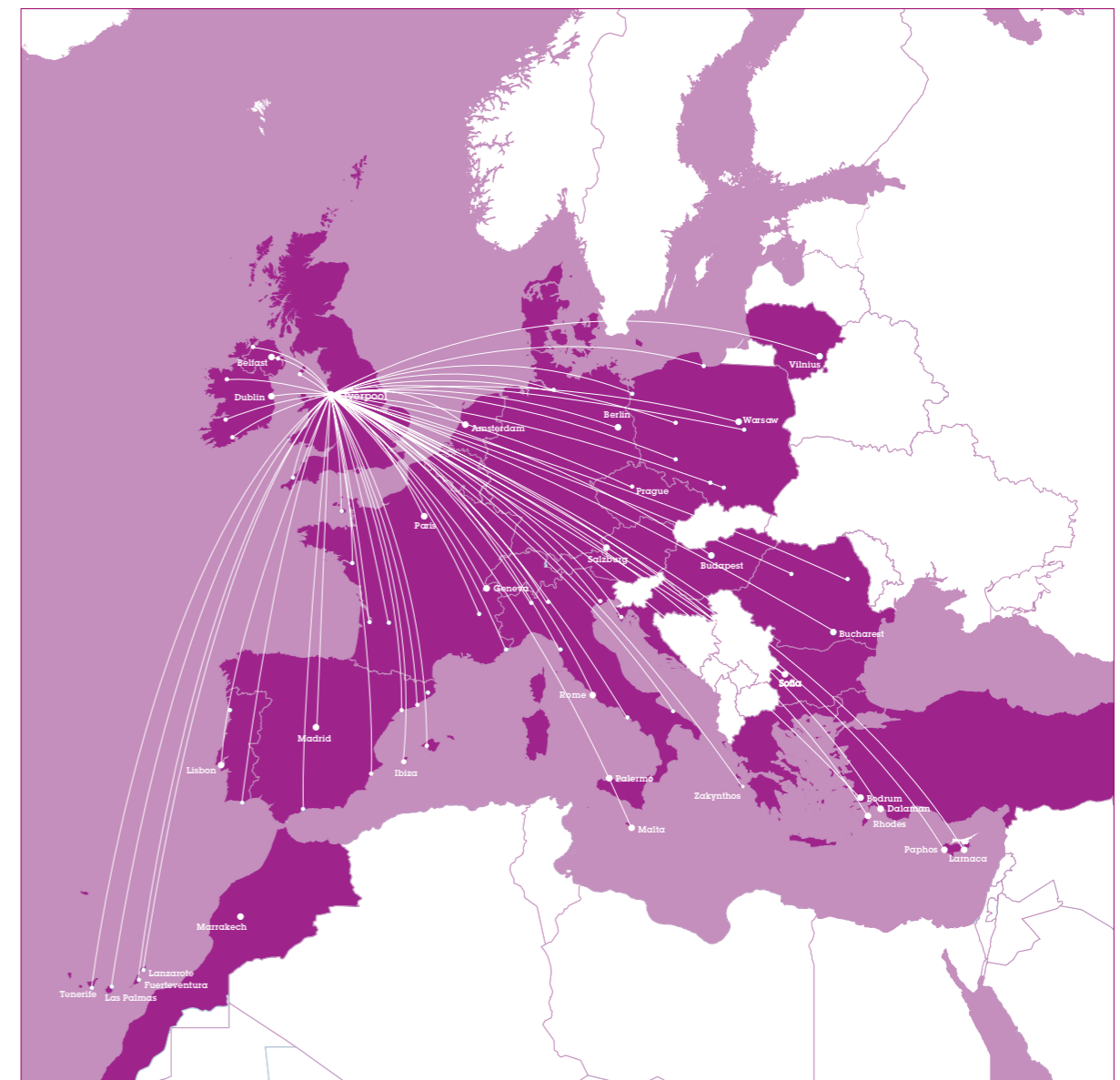
The Airport's recent development has been in tandem with the LCR securing significant economic growth since the recession. In 2015 Liverpool was noted as having the fastest growing economy in the UK with this increased economic activity positively affecting demand for services at LJLA.

LJLA connects the LCR to the world. It creates a positive economic impact through the jobs it creates, through money spent in the supply chain and by adding value through its activity.

LJLA already makes a significant contribution to the economy of LCR and it has ambitious plans to enhance its performance and contribution in the future. This is an important time for the Airport as it develops a sustainable business model and a strong foundation for future growth.

The changing landscape across the region as a result of the devolution of powers to Liverpool and Manchester, and the renewed focus on investment in transport infrastructure across the North, has created a unique opportunity for stakeholders across the region to work with regional airports to help accelerate growth and realise the region's long term growth ambitions.

'38% of passengers are inbound visitors to the region'



3. Our Strategic Vision

‘LJLA will be the Airport our region loves.’

As one of the UK’s leading regional airports LJLA recognises the important role it plays in the regional economy, within the local community, and also in promoting the Region internationally. As such the Airport has an ambition ‘to be the Airport our region loves’ by 2030, and aims to achieve this by focusing on:

People



Investing and valuing our colleagues and partners across the Region and in our community by:

Being a trusted partner of choice

LJLA is a key asset in the LCR and the Airport is committed to work in partnership to achieve the mutual aims and aspirations for the region. LJLA wishes to be a partner of choice with both commercial partners and stakeholders across the LCR; by supporting stronger financial return, delivering best in class operational performance, and / or working with partners across the LCR to support their requirements.

Being passionate about our community and our environment

The Airport aims to be an integral part of our community gaining support and loyalty from across the age and social spectrum. Being a good neighbour is a key facet of achieving our vision and we will demonstrate that we are passionate about our community and aim to make a real difference. We will ensure that our environmental targets are in line with the UK expectations on noise and emissions, and will ensure that we meet and exceed our targets.

Being an employer of choice

Our People are at the forefront of delivering our strategy and achieving the Airport’s vision. They are on the frontline in terms of providing the high level of service and the experience that is expected by our customers, and that will differentiate Liverpool Airport from the competition. We will ensure that our people have the right skills and the training to excel and see their long term development at the Airport.

Passenger Experience



Delivering an exceptional experience for all our passengers by:

Continuing to be Faster, Easier, Friendlier

Our passenger promise to be Faster, Easier, and Friendlier underpins the Airport’s customer facing activity and is a fundamental principle of the Airport’s vision and growth strategy. If LJLA is to compete effectively, it is crucial that we deliver the service that our passengers want.

Providing choice and value for our customers

The Airport’s success will be underpinned by providing choice to all air passengers across the LCR. It is vital that the Airport recognises the destinations and connections that both the business and leisure passengers demand, and delivers a broad choice of destinations and connectivity that will serve the market.

Building loyalty and pride towards our Airport

Providing an enjoyable, efficient and fun experience is key to building loyalty and pride towards the Airport, and getting back to the principle that the Airport is ‘part of the holiday’. Working with partners and stakeholders, the Airport will aim to communicate and support the passenger through the entire journey; inspiring them to travel, assisting in planning, providing an efficient journey to and from the Airport, and through the Airport on both departure and arrival.

Performance



Setting the standard for industry leading performance by:

Delivering continued passenger growth

Increasing the range of destinations served and the level of frequency on key markets will drive the Airport’s passenger growth. Understanding the demand and the market potential will allow the airport to link the LCR to key markets primarily across Europe, while also exploring how best to connect to the global markets that are profitable and sustainable for both airline and the airport.

Leading the industry in operational performance

The Airport’s number one priority is safety, and we will lead the industry in our approach to providing a safe and secure operation maintaining the highest standards in regulatory compliance.

Generating financial performance that creates a sustainable business

The Airport aims to generate a return that will allow for the continued reinvestment in the business supporting the ongoing growth of the Airport, the focus on the passenger experience, and enhancing connectivity.

4. Master Plan

LJLA adopted a new Master Plan in February 2018 that informs and shapes the Airport's potential growth and development out to 2050. The Master Plan sets a 'road map' to assist the delivery of the Airport's Vision and highlights key interventions required by 2030 to maximise the Airport's contribution to the region's economy; these are outlined below:

Enhancing International Connectivity

LJLA's ability to expand the range of destinations that it serves offers significant commercial opportunities for air passenger and cargo operators and adds choice and value for customers. Enhanced connectivity will drive positive economic impact across the region.

Improvements to the terminal and airport facilities will ensure that the Airport is attractive to new operators who can deliver new routes, including long haul destinations. Such expansion will also be necessary to handle the forecast increase in passenger numbers and will ensure that LJLA continues to become faster, easier and friendlier for passengers.

The Airport's Master Plan proposes to increase the length of the runway to ensure LJLA can facilitate the long haul routes that will enhance global connections, supporting the visitor economy and international trade.

Supporting Infrastructure Investment

LJLA recognises that investment in safe, convenient and sustainable surface access is essential to ensure that the Airport is easy to use and is attractive to operators and inward investors. This will be a key component of delivering the Airport's vision for 2030.

The Master Plan identifies opportunities to maximise the capacity of the existing transport network around LJLA and to increase the capacity of the road network in South Liverpool. This includes the delivery of a new Eastern Access Transport Corridor (EATC), which would improve the road network in the area, provide an enhanced 'gateway' to LJLA and to the LCR, and has the potential to release land to help meet the economic needs of the area.

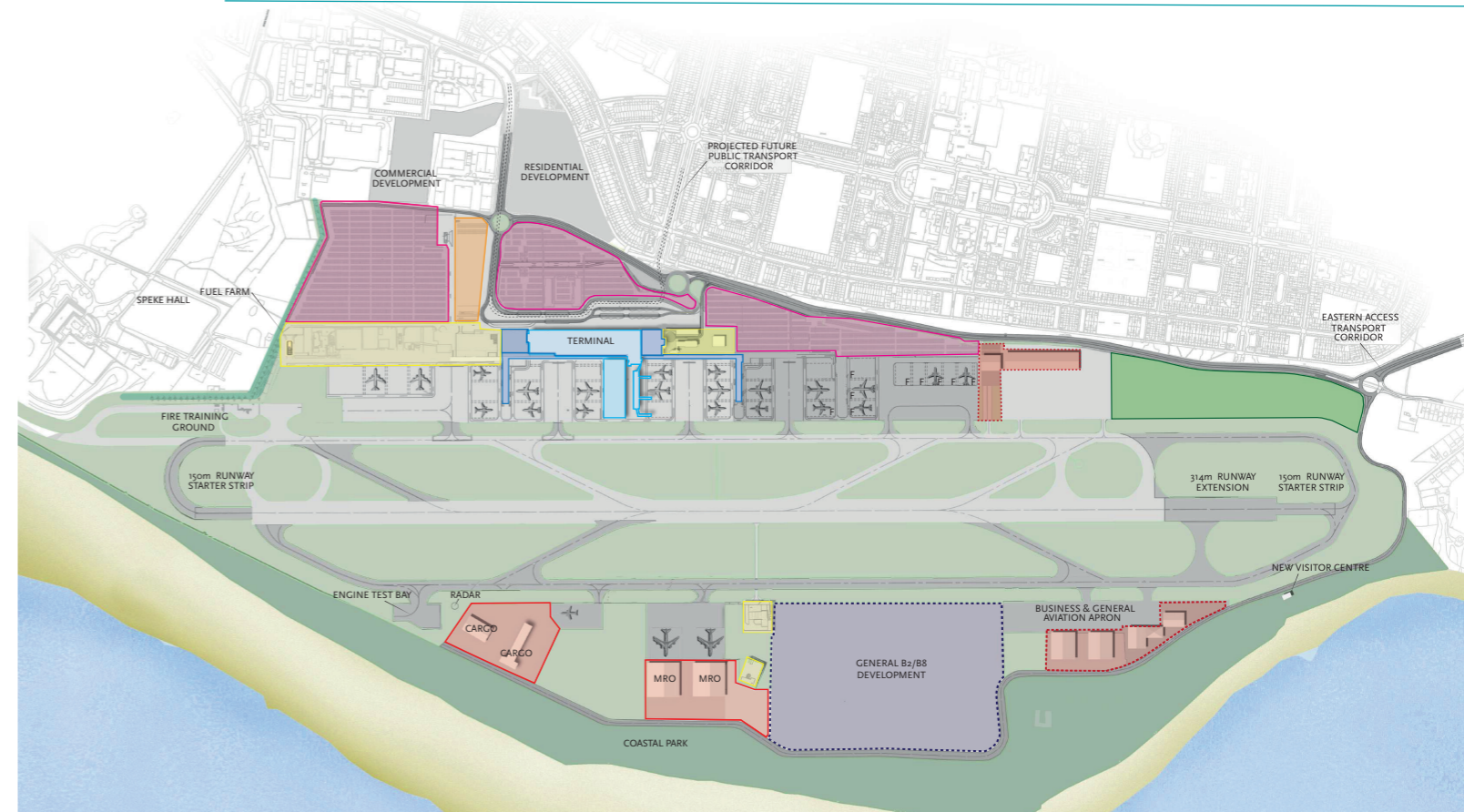
The Master Plan also retains the opportunity to deliver an enhanced public transport corridor which would facilitate a direct rail link into the airport connecting into the local and national rail network and broadening access options. These infrastructure investments will facilitate delivery of an improved entrance to the Airport, creating an enhanced impression for visitors, business travellers and investors to the LCR. It will also make LJLA faster and easier to use, and will help to build customer loyalty through an enhanced experience.

Developing the Airport as a Growth Hub

LJLA benefits from land which is available and suitable to support further aviation related and mixed use development. This provides a significant opportunity to cluster economic activity and attract valuable inward investment opportunities to the LCR.

The Master Plan identifies that the land to the south of the runway, where the overall depth of site is at its largest, can facilitate large distribution or warehousing facilities. This will respond positively to the advice from the Independent International Connectivity Commission, which sets out that airports should act as linchpins for wider economic hubs, supporting the attraction of Foreign Direct Investment. It will also respond to the LEP's recognised need to develop a large portfolio of logistics sites close to major infrastructure, such as LJLA.

LJLA Master Plan 2030



KEY					
	CAR PARKS (INCLUDING MULTI-STOREY)		MIXED RETAIL AND COMMERCIAL		NEW APRON, TAXIWAY AND RUNWAY
	EXISTING AIRPORT BUILDINGS		NEW CARGO & MAINTENANCE FACILITIES		EXISTING APRON, TAXIWAY AND RUNWAY
	NEW AIRPORT BUILDINGS		AIRPORT AND SUPPORT FACILITIES		POTENTIAL SOLAR SCHEME
	EXISTING CARGO FACILITIES		NEW BA/GA FACILITIES		AIRCRAFT STAND-LETTER F INDICATES FLEXIBLE AIRCRAFT STAND PROVIDING ADDITIONAL PASSENGER AIRCRAFT CAPACITY TO ACCOMMODATE UNFORESEEN STAND REQUIREMENTS (SUCH AS WEATHER OR TECHNICAL ISSUES)
	FUTURE B2 / B8 DEVELOPMENT		BUNDING		

Over the period of the Master Plan there is potential for significant cargo development. The development of logistics services associated with the LCR Growth Strategy, investments at the Port of Liverpool and broader Liverpool SuperPort offers the potential for dedicated air freight services.

Sustainability and the Environment

The Airport takes its environmental responsibilities seriously. It is a member of Sustainable Aviation, which is a body that aims to make aviation as sustainable as possible. The Airport also supports the Government's measures to address the impacts of aviation at an international level.

In considering the sustainability of these proposals the Master Plan addresses the economic, social and environmental dimensions of sustainable development. In particular, the proposals are expected to have a significant positive economic impact. This will include sustaining vital economic and transport connections, creating significant numbers of new jobs and delivering growth in the LCR.

The Airport has sought to minimise any adverse environmental impacts, mitigate harm, and where possible, provide landscape and ecological benefits as part of the development. The Master Plan has considered the noise, traffic and air quality impacts of the development proposals and demonstrated that the proposals are unlikely to give rise to significant adverse effects.

5. Strategic Alignment

National, sub-regional and local policy is supportive of regional airports and the role they play as catalysts for industrial growth. The growth of LJLA aligns precisely with these strategic policies; particularly those relating to international connectivity, infrastructure investment, and the creation of 'growth' hubs at airports.

1 Draft Aviation NPS, paragraph 2.1, p13
 2 Draft Aviation NPS, paragraph 3.33, p24
 3 Draft Aviation NPS, paragraph 3.32, p24
 4 Draft Aviation NPS, see table on p25
 5 Northern Powerhouse, Transport and Connectivity, HM Government (url: <https://northernpowerhouse.gov.uk/connectivity-and-transport/>)
 6 Industry Strategy, HM Government, pg12
 7 Industry Strategy, HM Government, pg128
 8 Industry Strategy, HM Government, pg128

9 Draft Strategic Transport Plan, Transport for the North, pg23
 10 Steve Rotherham: Our Future Together, pg23
 11 Independent International Connectivity Commission Report, pg20
 12 Building Our Future: LCR Growth Strategy, LCR Local Enterprise Partnership, pg 40
 13 Visitor Economy Investment Plan, LCR Visitor Economy Board, pg 37
 14 Draft Strategic Transport Plan, Transport for the North, pg30
 15 Building Our Future: LCR Growth Strategy, LCR Local Enterprise Partnership, pg 41
 16 Building Our Future: LCR Growth Strategy, LCR Local Enterprise Partnership, pg 40
 17 Mayor of Liverpool City Region (LCR)

International Connectivity

National



The UK Government recognises the importance that international connectivity brings to the economy:

“It is essential to allow domestic and foreign companies to access existing and new markets, and to help deliver trade and investment, linking us to valuable international markets and ensuring that the UK is open for business”¹

The UK Government has also confirmed that the expansion at Heathrow Airport will mean lower fares and access to important international markets.² It will also drive an increase in the number of regional airports with connections specifically into Heathrow³, including LJLA⁴.

Infrastructure Investment

The UK Government has placed the infrastructure investment at the heart of the plans to build a Northern Powerhouse. Better transport connection will help connect Northern towns and cities, creates jobs, and leads to faster and better journeys – all making the North a better place to live and work.⁵

The Industrial Strategy⁶ also sets out how the UK Government will help businesses create better, higher paying jobs in every part of the UK with investment in the skills, industries and infrastructure of the future. In particular, it states:

“We will create a new high speed rail network that connects people to jobs and opportunities, regenerate our stations and airports, and progressively upgrade our road network”.⁷

The Airport as a Growth Hub

The UK Government's Industrial Strategy⁸ is clear that the availability of high quality infrastructure is essential for our lives and work, and our future growth and prosperity. Efficient transport systems bring a wide range of work within people's reach, and bring goods from suppliers to markets.

Pan-Northern



Transport for the North's (TfN) draft Strategic Transport Plan highlights the importance of international connectivity to the economy. It states:

“International connectivity starts on the ground. To ensure that the North has robust and extensive connections to global destinations, the North's ports and airports must be connected to economic centres and assets. Greater international connectivity will boost business efficiency and increase trade, inward investment and Foreign Direct Investment.”⁹

TfN draft Strategic Transport Plan emphasises that improving surface access at airports is fundamental to creating the right conditions for the North's airports to enhance international connectivity. It states:

“People and businesses want faster, frequent, reliable services to access the North's ports and airports. These surface access improvements, alongside additional direct air connections, will support an increase in capacity and demand. In turn the surface access improvements to airports can then stimulate growth around airports, making them more attractive places to invest and do business.”¹⁰

TfN and the Independent International Connectivity Commission (IICC) have highlighted the economic benefits of clustering a broad range of uses around Airports. In particular, the IICC have stated:

“Airports have the potential to position themselves as linchpins for a wider economic hubs, supporting the attraction of Foreign Direct Investment. This may be through focusing on activities related to the core business, such as logistics or aircraft maintenance, or may be through more general business park activities, allowing companies to benefit from locating immediately adjacent to an airport. These clusters can add significant economic value locally. Income from such developments can help airports enhance their facilities and services to assist in delivering core growth in connectivity.”

Liverpool City Region



The Local Enterprise Partnership (LEP) recognises that the region must capitalise on its assets, such as LJLA. Its Growth Strategy¹² supports the expansion of the Airport to enhance the connectivity of the LCR. The LEP's Visitor Economy Investment Plan¹³ also highlights that enhanced connectivity is of **“fundamental importance”** to facilitating economic growth in the LCR. It provides the potential to open up new markets that are essential for the growth of international business tourism, particularly from Europe.

“We will deliver world-class connectivity through physical and digital infrastructure to drive growth, and expand opportunities for the City Region, its communities and all its people” global destinations, the North's ports and airports must be connected to economic centres and assets. Greater international connectivity will boost business efficiency and increase trade, inward investment and Foreign Direct Investment.”⁹

The Mayor of the LCR¹⁷ has made it clear that he will strive to improve rail connectivity within and to the LCR; including direct rail services from Liverpool to North Wales to improve connectivity with Wirral, Runcorn and LJLA.¹⁴

The importance of efficient rail and road access to the Airport is recognised within the LCR transport plan and the long term rail strategy developed by Merseytravel for the City Region. LJLA is recognised as a major international gateway, and an efficient transport network is key to providing a positive perception for Visitors, and to support the economic growth of the Region.

The LEP¹⁵ recognises the opportunity to develop a large portfolio of logistics sites, multimodal facilities and buildings to fulfil demand generated from increased port based freight, retail and manufacturing logistics close to major infrastructure, such as airports. The LEP's Growth Strategy highlights the opportunity to develop facilities at LJLA to enable growth in non-passenger related activities such as cargo, aircraft maintenance, and logistics infrastructure.¹⁶ Liverpool City Council has identified in its emerging Local Plan that the land to the south of the runway can accommodate employment uses (aviation related-uses, aerospace businesses, logistics, advanced manufacturing and offices) to support LJLA's role as a key driver of the LCR economy.

6. Growth in Partnership

LJLA will work with key stakeholders and the community to deliver its Vision and ensure the Airport makes its fullest contribution to the economic development of the LCR, the wider region and the UK.

Working together to secure International Connectivity

The LCR is increasingly, a world-renowned destination for visitors, investors and businesses alike. There is strong strategic policy support to strengthen its international connectivity to promote economic growth.

LJLA will therefore work with stakeholders in the following ways to secure these benefits:

Route Development

LJLA will work with partners across the LCR to identify the target destinations that will help drive economic development in the region. The Airport will seek to collaborate with these partners to implement strategies to secure and develop routes, increasing frequency of flights, and creating new global links that improve the connectivity across the region.

Destination Marketing

Global destination marketing has the potential to support and enhance the services and destinations available from LJLA. The Airport will look to work in partnership with all stakeholders to promote opportunities for inbound travel on the international stage for new and existing routes. Support for the Airport in their dialogue with current operators, new destinations and other potential target markets would help to boost existing services and potentially add links to new markets.

Domestic connectivity and Airports Policy

The UK Government has confirmed that the expansion at Heathrow Airport will provide potential for a specific link to LJLA. Flights to Heathrow from LJLA will substantially enhance connectivity in the North by providing regular and convenient access to international markets. The Airport will therefore work in partnership with UK Government, Heathrow Airport, the Combined Authority and TfN to secure this new route.

Working together to achieve Infrastructure Investment

Policy at all levels highlights the need to provide the right infrastructure to ensure the region's airports deliver enhanced international connectivity and stimulate growth around them. Surface access plays an important role in creating a positive impression for visitors to the region through its major international gateways. LJLA will seek to work with stakeholders in the following ways to secure these benefits:

Improving journey time reliability

LJLA will continue to work with TfN, the Combined Authority, and local authorities to deliver the Eastern Access Transport Corridor and improve the road network in South Liverpool. This will provide additional traffic capacity and enable bus service improvements and public transport priority measures to improve reliability and reduce journey times, benefitting all users of the corridor. Linking LJLA to the Major and Strategic Road Networks will ensure the appropriate focus and investment and the road infrastructure to enhance the connectivity to the Airport and ultimately support regional economic growth.

Facilitating improved rail access

Enhancing rail connections to the region's Airport is a key measure within TfN's long-term rail strategy and the LCR's rail plans. The Airport will continue to work with TfN and the Combined Authority, alongside Merseytravel and the train operating companies, to support strategic transport schemes, such as the re-opening of the Halton Curve rail link.

The Airport will work in partnership with TfN and the Combined Authority to promote the opportunities for the Airport from NPR such as extending the Airport's catchment area and thereby making more routes and services viable. This will in turn ensure that LJLA plays a key role in increasing international connectivity and provide choice to passengers across the North.

However, local rail connectivity is vital to improving the access to the Airport, and LJLA will work with partners to promote investment in the local and regional rail infrastructure supporting improved access across the region. Liverpool South Parkway must play a pivotal role in enhancing rail connectivity in Merseyside and could to make it easier, cheaper, and faster to travel to LJLA. Maximising the potential of Liverpool South Parkway as an Airport interchange alongside the development of a direct rail link to the Airport, will be key to enhancing the surface access infrastructure.

Working together to develop the Airport as a Growth Hub

There is recognition in pan-northern, regional and local policy that airports can act as linchpins for a wider economic hubs and support the attraction of inward investment.

Commercial development at LJLA can make a significant contribution to the regional economy and act as both a focal point and key differentiator for a regional growth hub. LJLA has played a key role in the regeneration of South Liverpool, and further commercial developments at LJLA can support the continued success of the South Liverpool Mayoral Development Zone and drive further economic growth and employment around the Airport.

As part of this, it is critical that the future strategic economic plans and local development in the LCR include support for commercial development at the Airport and provide the necessary planning certainty to encourage viable development. LJLA will seek to work with stakeholders to attract inward investors to the Airport.

7. Enhanced Economic Benefits

LJLA already plays a significant role in the economic health and wellbeing of the LCR, supporting thousands of jobs, bringing international visitors and business travellers and adding value to the economy through its activities.

Delivery of the Airport's Strategic Vision and the Master Plan will further enhance these benefits and the contribution that LJLA makes.

Enhanced Passenger Related Benefits

The increase in passenger throughput, associated expansion of the terminal buildings and other passenger related aviation investment has the potential to increase the Airport's total annual GVA impact to £625 million. Implementation of the Master Plan will also enable the Airport to support further employment – more than 12,000 jobs across the LCR by 2030.

Enhanced Non-Passenger Related Benefits

The Master Plan proposes additional maintenance, repair and overhaul (MRO), cargo / air freight, General and Business Aviation and engineering activities to the south of the runway. Combined, these activities have the potential to create an additional 630 jobs onsite by 2030, with an associated productivity boost of £46 million every year.

Employment onsite is forecast to increase to 850 jobs when the Master Plan is fully implemented in 2030. This will generate over £60 million every year in additional GVA.

The benefits of commercial development will also be significant, with the potential for over 3,000 net additional jobs within the LCR by 2030 and £210 million GVA every year.

An Enhanced Contribution to the LCR

Delivering this scale of enhanced economic benefits highlights the important role that LJLA will play in delivering the growth ambitions of the LCR, creating and sustaining economic opportunities for many residents. Furthermore, growth of LJLA will have a catalytic effect by supporting the growth of LCR's businesses and visitor economy.

...Where we'll get to by 2030

8 million
passengers handled
annually



Connected
to Europe
and the World



4000 additional
jobs across the LCR by 2030 through
non aviation development



£270m
associated productivity
boost every year through
non aviation development



Over **£100m**
planned investments
in next ten years