



**Southampton Airport**

**A Vision For Sustainable**

**Growth**

# Contents

1. Foreword by Managing Director	6
2. Executive Summary	7
3. Southampton Airport today	9
4. National and Local Policies impacting A Vision For Sustainable Growth	19
5. Growth Forecast 2017-2037	27
6. Infrastructure Requirements 2017-2037	31
7. Corporate Social Responsibility	39
8. Economic Impact	56
9. Our Commitments and Next Steps	67
10. Glossary of Terms	69
11. Abbreviations	70
12. Appendices	71

Dedicated to Godfrey G. Olsen OBE  
1929 - 2019

A great friend of Southampton Airport



A Vision for  
Sustainable  
Growth outlines  
the development  
required to improve  
our region's air  
connectivity and  
growth prospects.



**“I am very pleased that so many local residents were able to express their view in a positive way to the proposed Airport Master Plan. I look forward to its future progress.”**

- Godfrey G. Olson. O.B.E.  
Chairman Southampton International Airport Consultative Committee

# 1. Foreword by Managing Director



## IMPROVING REGIONAL AIR CONNECTIVITY FOR THE FUTURE

International connectivity is a key element in the success of any regional economy, and A Vision for Sustainable Growth outlines the development

required to not only maintain, but importantly, improve our region's future connectivity and growth prospects. Southampton Airport has grown over the past five years, increasing the number of destinations as well as attracting more airlines, providing increased choice for the two million passengers who use the airport every year. Southampton Airport has an excellent reputation for its high levels of service, including its convenience and ease of use, which we are keen to maintain and develop further in the future as we grow.

Southampton Airport is a large employer in the region with nearly 1,000 staff employed on site with additional indirect employment across the region. In total this generates more than £160m each year for the regional economy.

To achieve its potential, our region needs efficient and effective transport infrastructure including strong air connectivity. Southampton Airport has one of the shortest runways in the UK and is therefore unable to provide the same breadth of European air services that other regional airports offer. As a result, unnecessary long journeys are made on some of the country's busiest roads, to the already congested London airports. There is clear demand to provide an easier and enhanced choice of air services for European destinations which are closer to our customers and the region we serve. Destinations such as Frankfurt, Stockholm, Copenhagen, Barcelona, Prague and Milan amongst others, are high on the list of demand for future routes from Southampton Airport.

A Vision for Sustainable Growth - which is the name we have given our Master Plan - sets out the growth path for Southampton Airport over the next 20 years, including key developments and the associated land use plans. These include the development of a runway starter extension and the expansion of passenger facilities including the existing terminal building, which is located adjacent to the excellent rail and road connections. Southampton Airport will enlarge its role as a key transport and economic asset, supporting our region's strategy of building upon its strength in marine, advanced manufacturing, further education and tourism.

Through public consultation of our plans we have shaped a clear picture of the views of our local communities. Whilst the majority are positive about responsible airport growth, we will ensure that all views are taken into consideration and are making a number of commitments on noise, air quality and surface access to ensure this is the case. We recognise that a growing airport brings huge benefits to the region it serves. However, that growth must be delivered sustainably to ensure that benefits are shared throughout the community.

Southampton Airport can act as a catalyst for the ambitions of the region, providing new jobs for 500 people onsite and uplifting our contribution to the regional economy to £400m per year by 2037. In addition, we will continue to operate within the heart of the local community, working hard to improve the legacy we leave for future generations.

**Neil Garwood**  
Managing Director, Southampton Airport

## 2. Executive Summary

### Economic Footprint\*

2015 (ACTUAL)  
£161 MILLION



CUMULATIVE  
ECONOMIC CONTRIBUTION  
OVER MASTER  
PLAN PERIOD

2027 ECONOMIC CONTRIBUTION WITH MASTER PLAN  
£325 MILLION

2037 ECONOMIC CONTRIBUTION WITH MASTER PLAN  
£400 MILLION

£1.8  
BILLION

### Staff Employed On Campus



2015  
(ACTUAL) 950

2027 1,200

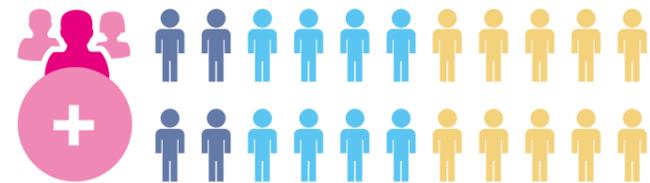
2037 1,500

### Passenger Forecasts

2017  
2  
MILLION

2027  
4  
MILLION

2037  
5  
MILLION



### Air Transport Movements

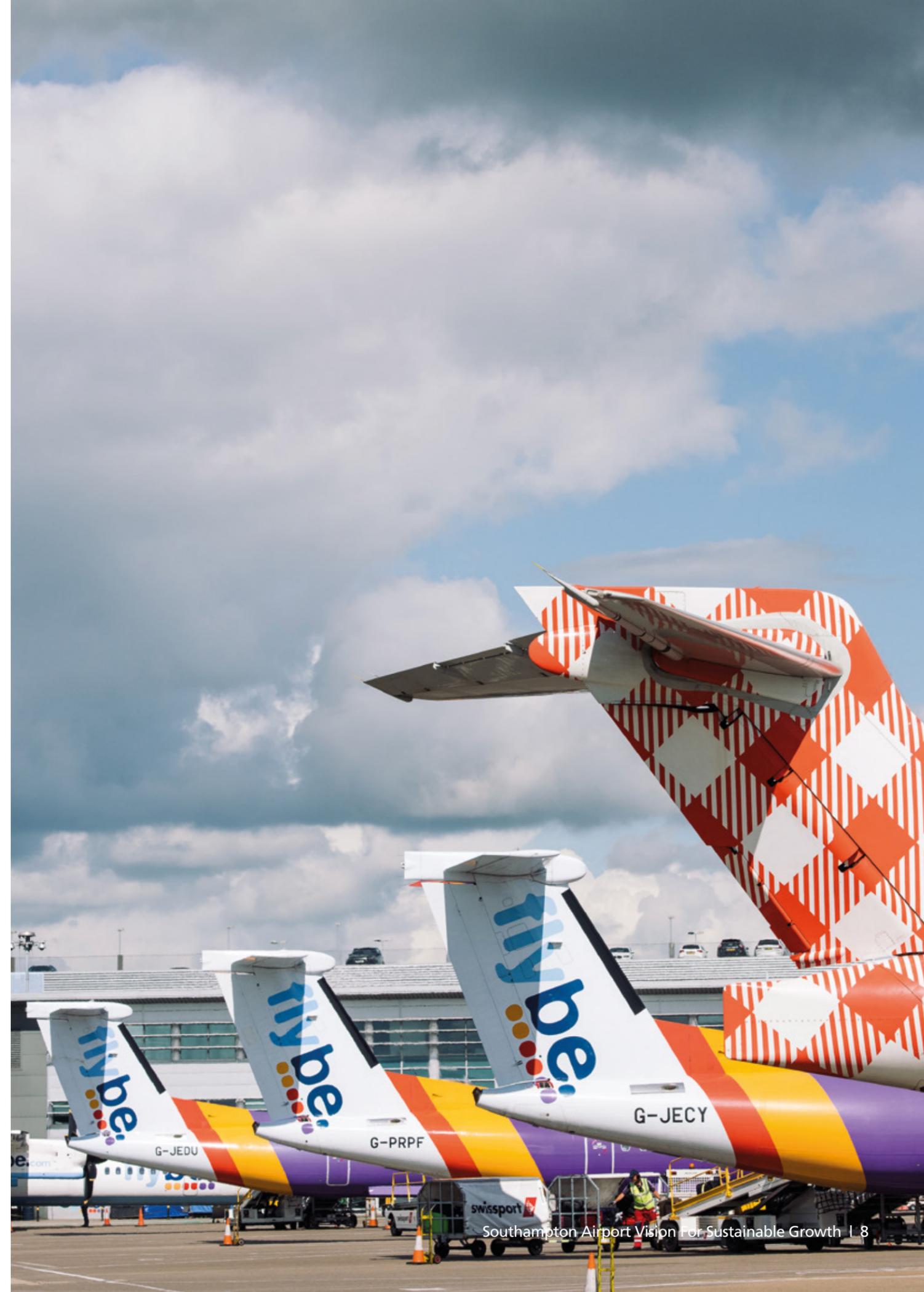


2017  
ACTUAL  
39,300

2027 53,100

2037 57,800

\*Economic footprint is the total of direct, indirect and induced economic impacts



# 3. Southampton Airport today

## 3.1 INTRODUCTION

This chapter describes Southampton Airport as it is today. It outlines the characteristics of Southampton Airport, the scale of its activities and its facilities as they currently stand.

## 3.2 BACKGROUND

The story of Southampton Airport spans over 100 years of aviation history with the first flight in 1910, including active roles in both world wars. The recent development of Southampton Airport as it is today began when BAA plc acquired the site in 1990, and set about creating a model regional airport. This involved building many new areas including the terminal building, control tower, aircraft hangars, fuel farm, roads and car parks. The “new” airport was opened in 1994 and was subsequently purchased by its current owners, AGS Airports Ltd in 2014.

**FIGURE 1: PASSENGER NUMBERS USING SOUTHAMPTON AIRPORT**



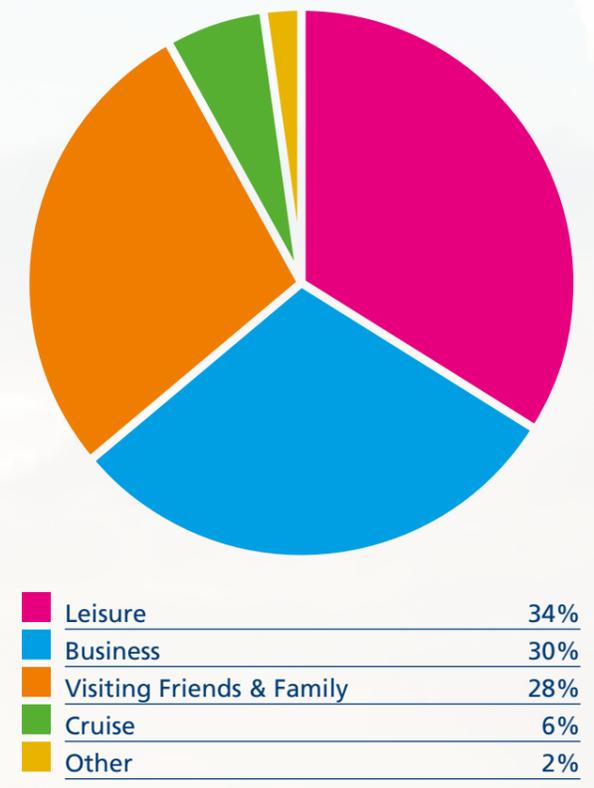
## 3.3 PASSENGER VOLUME AND PROFILE

In 2017 and 2018, Southampton Airport handled 2.1 million passengers. Figure 1 shows the growth in air passengers at Southampton Airport since the redevelopment in 1994.

The most popular reasons for using Southampton Airport are business, leisure and visiting friends and relatives, as shown in Figure 2. In recent years there has been a growth in cruise passengers which reflects the growing cruise industry at the Port of Southampton.



**FIGURE 2: REASON FOR USING SOUTHAMPTON AIRPORT IN 2018**



### 3.4 CATCHMENT AREA

Southampton Airport is situated within a densely populated catchment area, with 3.5 million people living within one hour's drive time, and 1.4 million living within just 30 minutes.

### 3.5 ORIGIN OF SOUTHAMPTON AIRPORT PASSENGERS

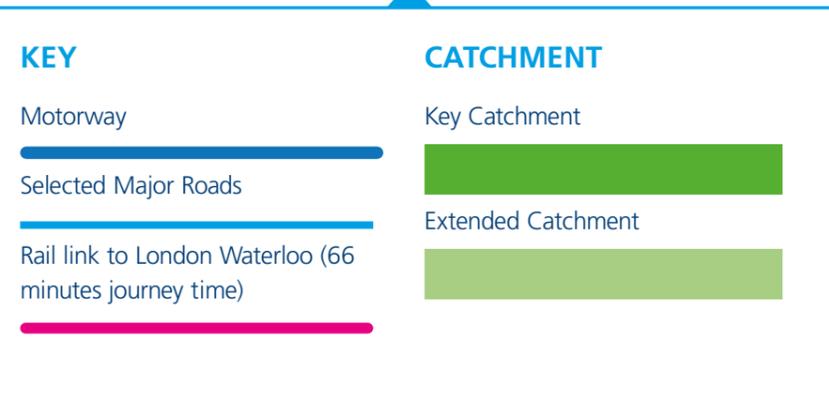
78% of Southampton Airport passengers are outbound, whilst 22% are inbound, with the vast majority coming from across the Hampshire region. The cities of Southampton, Portsmouth, Poole and Bournemouth are especially large catchments areas for passengers.

Southampton Airport is popular with passengers because of its ease of access, small scale and its friendly and personal service. Southampton Airport has been designed specifically as a regional airport, providing short haul air links to Western Europe, large UK cities, and the Channel Islands. It is anticipated that these destinations will remain dominant, although aircraft engine technology developments may mean that the aircraft could fly to destinations further afield in the future.

Southampton Airport also has links to some key hub airports such as Amsterdam and Paris which enable easy long haul connections worldwide.



FIGURE 3: SOUTHAMPTON AIRPORT CATCHMENT AREA MAP



### 3.6 DESTINATIONS

Southampton Airport currently has seven airlines and tour operators, who between them fly to 41 different destinations in 14 countries across Europe.

The most popular destinations for passengers travelling from Southampton Airport in 2018 were Edinburgh, Manchester, Amsterdam Schiphol, Glasgow, Jersey, Guernsey, Dublin, Belfast City, Newcastle, Paris and Geneva. There remains considerable potential for future growth of existing routes, as well as new unserved European routes.

### 3.7 TOP 15 NEW ROUTE OPPORTUNITIES

Although there is a good network of European destinations on offer currently, there is substantial potential for new routes in the future. The top 10 destinations for which there is particularly strong demand and which are currently unserved include: Barcelona, Milan, Rome, Stockholm, Frankfurt, Madrid, Berlin, Copenhagen, Venice and Prague which combined, have a total passenger demand from the Southampton catchment area of 2 million passengers per annum.





### 3.8 AIRSPACE

The airspace serving Southampton Airport is managed by NATS. Landings and take-offs are controlled using established procedures from the air traffic control tower which is located to the north of the terminal building.

### 3.9 SAFETY AND SECURITY

Southampton Airport is subject to stringent regulations regarding aircraft safety, which are set and monitored by the Civil Aviation Authority (CAA). Health and safety and security training is mandatory for all staff working at Southampton Airport.

### 3.10 AIRFIELD FACILITIES

The airfield constitutes a significant proportion of the land within Southampton Airport's boundary. It comprises the airport's runway, the taxiways and the extensive grass areas surrounding these facilities. Southampton Airport's fire training area is also included within the airfield, as are a variety of navigational and landing aids.

Southampton Airport has one runway which is 1,723 metres in length. The runway was originally constructed in the 1960s and is equipped with an Instrument Landing System (ILS) for aircraft approaches from the North.

For the purposes of our Vision For Sustainable Growth, Southampton Airport's apron area is an area where aircraft are parked, allowing for the embarkation and disembarkation of passengers or the loading and unloading of cargo and include any associated aircraft stand taxiways. Southampton Airport has 14 passenger aircraft parking stands in total.

### 3.11 PASSENGER TERMINAL FACILITIES

The terminal zone covers an area of approximately 1.4 hectares and includes the terminal building and parking areas for some airside vehicles and equipment. It also includes a variety of adjacent buildings, notably:

- Offices
- Air/cabin crew reporting facilities
- Baggage handling
- Accommodation for aircraft services staff.

The current terminal building was opened in 1994. Facilities include check-in, security, airside departure lounges and gate areas, domestic and international baggage reclaim, immigration, customs, shops, executive lounge and catering outlets. There has been some internal reconfiguration since 1994 and a study of the area's capacity has suggested that the current building could, with some changes, handle up to 2.25 million passengers per year.

In early 2005, approximately a third of the terminal building's upper floor area was redeveloped, replacing office facilities and the viewing gallery with a new balcony-level departure lounge extension. By 2010 a third security channel was opened.

Other passenger facilities include a bureau de change, car hire (within a separate building outside the terminal), taxi desk, wireless internet access and a passenger information area.

### 3.12 ASSISTANCE FOR PASSENGERS WITH SPECIAL NEEDS

Southampton Airport was designed with special needs passengers in mind. This helps the higher than average number of passengers using Southampton Airport for accessing medical treatment in Southampton and Portsmouth, including those travelling from the Channel Islands.

Facilities that have been designed to be compliant with the Disability Discrimination Act (DDA) include accessible toilets, reserved seating areas, a dedicated payphone, check-in desk, Passengers with reduced mobility (PRM) call points in the pick-up and drop-off area and a PRM reception desk. Vehicles used by the private hire vehicle company based at Southampton Airport are DDA compliant. Clearly signed blue badge parking is available in the short and long stay car parks in positions most convenient to the terminal building, and special training is provided for staff who deal with passengers requiring assistance.

### 3.13 CARGO

Southampton Airport's cargo throughput predominantly consists of courier and express deliveries. Other cargo types include supplies for ships berthed at local ports. The majority of cargo movements to and from Southampton Airport are via the hold of passenger aircraft, with occasional freight-only flights. As Southampton Airport is closed at night, it is not used by specific air freight customers who tend to operate overnight.

### 3.14 EXECUTIVE AIRCRAFT

Facilities are offered for a range of executive and private aircraft that use Southampton Airport via companies such as Signature Flight Support Corporation.

### 3.15 AIRCRAFT MAINTENANCE

Aircraft maintenance consists of minor, on-stand maintenance for commercial aircraft and some in-hangar maintenance for general aviation.

### 3.16 ANCILLARY FACILITIES

A range of ancillary services and facilities are required at all airports to support the aviation business. There are details of some of the more important ancillary facilities below.

#### AIRPORT FIRE STATION

Southampton Airport has its own fire station, situated near the base of the control tower. There is a fire training ground on the airfield, where specialist aircraft fire training regularly takes place.

#### FUEL FARM

There is a fuel farm operated by World Fuel Services at Southampton Airport. Fuel is delivered by tanker to the fuel farm and then by bowser (fuel tanker) to the aircraft.

#### IN-FLIGHT CATERING

In-flight catering services are provided by Newrest in a dedicated preparation unit.

#### HOTELS

There is one hotel located close to Southampton Airport, which is the Premier Inn. This is situated on land adjacent to Southampton Airport but independently owned and operated. The Premier Inn currently offers 148 rooms and car parking spaces.

#### LANDSCAPING

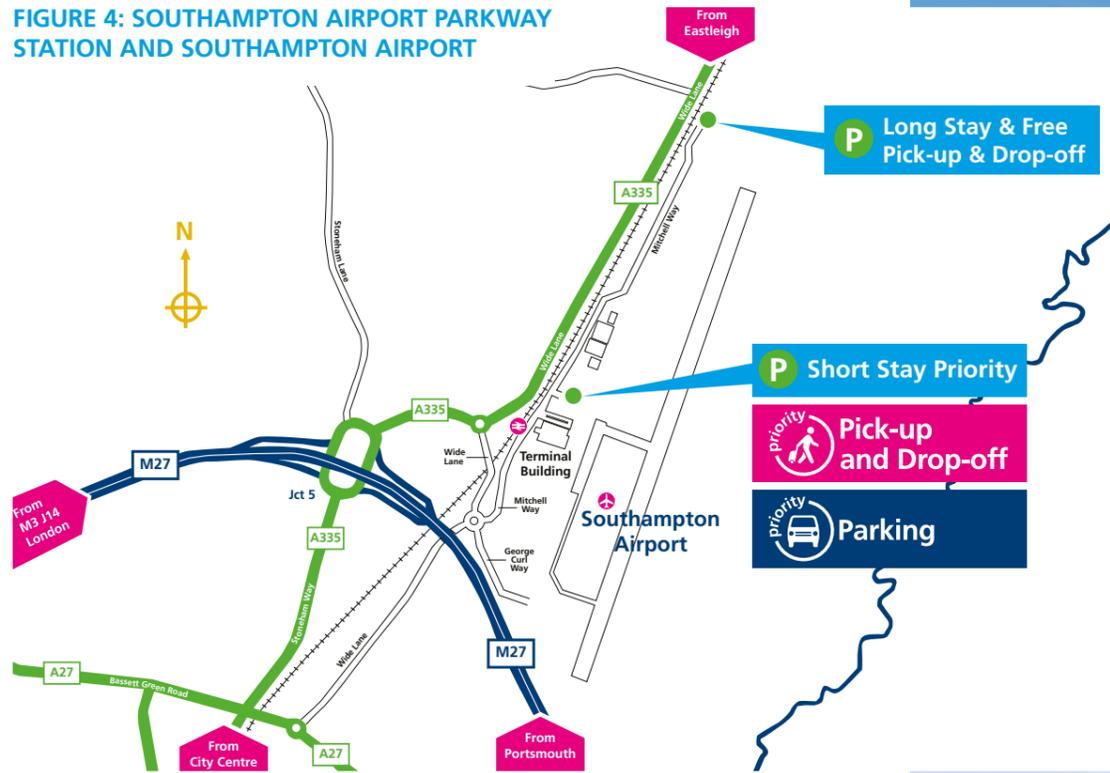
Southampton Airport's current landholding includes some areas of landscaping, the two key areas being along the eastern boundary of the airport and landside within the developed areas of the airport.



### ASSISTANCE FOR PASSENGERS WITH SPECIAL NEEDS.



FIGURE 4: SOUTHAMPTON AIRPORT PARKWAY STATION AND SOUTHAMPTON AIRPORT



“This is great news for the community that the ability to fly and work at Southampton Airport will be increased. As the local Member of Parliament, it’s my aim to make sure those great opportunities for our local businesses or holiday-makers are balanced with environmental concerns and the challenge of growing. My experience of the airport is that they are a good friendly neighbour and I’ll be making sure we are all working together to deliver the thriving airport with a strong environmental footprint.”

- Mims Davies, MP

### 3.17 CAR PARKING

There are several parking options within the Southampton Airport boundary. The short stay public car park is located in front of the terminal building in a multi-storey car park. Pick-up and drop-off facilities are provided within the short stay car park. Long stay car parking is provided at surface level in the north west of the airfield and staff car parking is absorbed within the public parking areas. The table below shows the number of parking spaces by type, Figure 4 illustrating the car park locations and close proximity to the transport infrastructure.

CAR PARK	NO. OF SPACES
Short stay car park	1,435
Long stay car park	1,430

### 3.18 CAR RENTAL

Southampton Airport currently provides facilities for 4 car rental companies comprising desk facilities within a dedicated building adjacent to the terminal, and a total of 120 car parking spaces on an area adjacent to the short term car park.

### 3.19 PUBLIC TRANSPORT

Details of these facilities are included in Chapter 7 on Surface Access.



# 4. National and Local Policies impacting A Vision For Sustainable Growth

## 4.1 THE FRAMEWORK OF REGULATION AND LEGISLATION

The Government's role in the aviation industry is one of principal enabler and regulator. The Civil Aviation Authority (CAA) is the statutory corporation which oversees and regulates all aspects of civil aviation in the United Kingdom. To enable future airport development, the Government exerts its influence through its own transport policy and through the national, regional and local planning systems.

There are functional and legal limits to Southampton Airport's activities as an airport owner and operator. By way of example, responsibility for airspace policy and air traffic control respectively, lies with the UK Government and NATS En Route Ltd (NERL). This chapter outlines the principal controls and influences of relevance to Southampton Airport's operation and development.

## 4.2 UK AIRPORTS POLICY

National aviation policy is currently set out in the Government's Aviation Policy Framework (APF) (2013), replacing The Future of Air Transport White Paper (2003). The APF outlines the Government's objectives, principles and guidance on issues that will challenge and support the development of aviation across the UK at a local and regional level. The APF also sets out the principles which the Independent Airports Commission, led by Sir Howard Davies, took into account in working up its recommendations on the need for an additional runway in the South East (Interim Report in December 2013) and its conclusion that a Northwest runway at Heathrow Airport offered the greatest economic and strategic benefits for the region.

## 4.3 NATIONAL AVIATION POLICY

The current Aviation Policy Framework sets out the Government's policy to allow the aviation sector to continue to make a significant contribution to the UK's economic growth. A key priority of this framework is to work with the aviation industry to make better use of existing runway capacity at airports across the UK. The government also announced in February 2017 that it is developing a new strategy which will explore how the UK can maximise the key role that the world class aviation sector plays in developing global trade links. More recently the Government policy document on aviation entitled 'Beyond the Horizon: The Future of UK Aviation' published in June 2018, evidenced the benefits of and gave support for wider airport development in addition to Heathrow, in order to meet the UK's air service needs in the years to come as forecasts show continuing passenger growth into the 2050s and beyond.

## 4.4 NATIONAL INFRASTRUCTURE AND INDUSTRIAL STRATEGY PLANS

In October 2010 the Government published the National Infrastructure Plan (NIP) outlining its vision for the future of UK's economic infrastructure. This was updated in 2014 and in relation to aviation the Government seeks to ensure that the UK has sufficient airport capacity to meet current and forecast needs.

In November 2017 the Government published its Industrial Strategy. The strategy highlighted that by 2030 the UK would have transformed productivity and earning power across the UK to become the world's most innovative economy and the best place to start and grow a business, with upgraded infrastructure and prosperous communities across the country. The strategy is for the long term and seeks to provide a policy framework which will enable major private and public sector investment decisions to be made with confidence.

The Industrial Strategy sets out a vision to provide the UK with:

- The world's most innovative economy
- Good jobs and greater earning power for all
- A major upgrade to the UK's infrastructure
- The conditions to be the best place to start and grow a business
- Prosperous communities across the UK.

The crucial role which aviation plays in connecting businesses to both existing and new markets in a post-Brexit era was highlighted as being key.

## 4.5 MASTER PLAN GUIDANCE

In preparing their local plans, local authorities are required to have regard to policies and advice issued by the Secretary of State, including the APF, to the extent it is relevant to a particular local authority area, along with other relevant planning policy and guidance. On master plans the APF suggests the following content: "the more ground covered in a master plan and the more extensive the consultation which has informed its preparation, the greater its value in informing future land use, transport and economic planning processes, and in supporting prospective planning applications. We would anticipate that, in the case of most airports, master plans will address the following 'core' areas:

- Forecasts
- Infrastructure proposals
- Safeguarding and land/property take
- Impact on people and the natural environment
- Proposals to minimise and mitigate impacts.

We will closely scrutinise any policy documents relevant to Southampton Airport published by regional bodies, local authorities and other agencies. Southampton Airport will seek to ensure that the policies respect and make reasonable provision for its interests and those of its suppliers and users.



# Southampton Airport provides important transport connections and is one factor in the success of the South Hampshire economy



## 4.6 REGIONAL GROWTH PRIORITIES: SOLENT LOCAL ENTERPRISE PARTNERSHIP AND SOLENT GROWTH DEALS



In 2010 the Government committed to establishing Local Enterprise Partnerships (LEPs) to replace the Regional Development Agencies (RDAs). LEPs give decision-making powers to partnerships of local authorities and businesses over what the priorities should be for investment in roads, buildings and facilities in a local area.

Southampton Airport is located within the area covered by the Solent Local Enterprise Partnership. Since 2014 the Solent LEP has secured £182.92m to invest in high profile projects through three Solent Growth Deals.

The Transforming Solent – Solent Strategic Economic Plan (SEP) 2014-20 sets out a plan for growth which builds upon the LEP's strengths. The Ford site, Eastleigh Riverside and Southampton Airport site are included in a list of sites that are considered to be strategically important to the delivery of the SEP over the period up to 2020. It is stated that the site provides an opportunity for a prestigious gateway that will add high quality jobs, supply chain opportunities and make a major contribution to the Solent area's inward investment potential. It was proposed that this would be achieved through a single master plan which would be developed for the Ford, Eastleigh Riverside and Southampton Airport area.

## 4.7 LOCAL AUTHORITY POLICIES

The Eastleigh Borough Local Plan 2011-2036 is currently being developed and will form part of the Development Plan when adopted, replacing the saved policies of the 2001-2011 Local Plan. Southampton Airport falls within an identified growth area in which a link road is proposed to unlock regeneration opportunities and alleviate existing peak hour congestion.

The Eastleigh Borough Local Plan 2011-2029 was submitted to the Secretary of State for formal examination on 15 July 2014 but was considered not sound by the Inspector. The draft plan identified Southampton Airport as one of three key 'gateways' for the South Hampshire sub-region. Policy E12 on Southampton Airport designated 21.6 hectares of land northeast of the runway for development for airport-related activities and employment uses.

The saved policies from the Eastleigh Borough Council Local Plan 2001-2011 (adopted May 2006) form the Borough Council's current adopted local plan. As part of the review process in formulating this plan, Southampton Airport achieved an agreed position with the local council regarding the Southampton Airport Spatial Policy area which is reflected in the final plan as follows:

"Southampton Airport provides important transport connections and is one factor in the success of the South Hampshire economy. Southampton Airport's operations also need to be controlled in respect of amenity of local residents; surface transport implications; and the strategic gap. Within the existing Southampton Airport boundary some airport related development has permitted development rights under the GPDO."

An agreed position was reached in regard to the future use of the land known as the Northern Business Park, which is referred to as the North East Zone in this document. The land which is owned by Southampton Airport can be developed within a number of conditions as outlined in the local plan, however up to a maximum of 4 hectares can be developed for airport related development. Please see section 6.2.8 for further details.

## 4.8 DEVELOPMENT CONTROL

Airport development is subject to the normal processes of development control, as set out in town and country planning legislation, the National Planning Policy Framework and relevant circulars and guidance. Airport development at Southampton Airport is unlikely to use the Planning Act 2008 authorisation scheme as it is unlikely to qualify as a Nationally Significant Infrastructure Project (NSIP). New airport development would have to be capable of handling at least 10m additional passengers or 10,000 cargo movements a year to be an NSIP. In common with owners of other property, Southampton Airport is entitled to undertake various forms of permitted development at the airport, subject to prior submission of a consultation (rather than a planning application) to the local planning authority.

In cases where development does not qualify as permitted development it is necessary for Southampton Airport to apply for and obtain planning permission from Eastleigh Borough Council, in accordance with legislation, before development can proceed.

In 1993 Southampton Airport entered into a 'Flying Controls Agreement' with Eastleigh Borough Council. The Flying Controls Agreement encompasses a range of measures to safeguard the local community, including: night time closure, runway length and alignment, types of aircraft, flying training, helicopter operations, ground running of aircraft engines, aircraft vortices, the preferred routing of aircraft and air quality.

## 4.9 AIRPORT DESIGN CRITERIA

As a signatory to the 1944 Chicago Convention, the UK is required to operate its airports in accordance with internationally agreed criteria. In the UK, responsibility for ensuring this takes place is given to the European Aviation Safety Agency (EASA). Airports operate in accordance with terms of a licence issued by EASA and to obtain and retain that licence, they need to satisfy and continually adhere to the EASA's exacting safety-related standards.

Standards affecting the design of airports are finely detailed in the EASA publications and are subject to revision in light of ongoing monitoring and review, including international cooperation to consider developments such as the introduction of new aircraft.

The future development of Southampton Airport's facilities will be in accordance with the EASA's requirements – indeed some development may be an obligatory response to the introduction of new or revised standards. While it is not appropriate for this plan to explain the standards in fine detail, it is noteworthy that they cover such matters as:

- The layout, separation and widths of runways and taxiways
- Aircraft stand sizes and apron layouts
- Airport fire service facilities
- The height and design of buildings and structures.

## 4.10 AIRPORT SECURITY

Airport security requirements are the subject of regulatory control by the Department for Transport (DfT). This can have a defining influence on the need for development, as well as the form and characteristics of facilities at Southampton Airport. For example, the airport is required by the DfT to segregate departing and arriving international air passengers in the airside areas.

## 4.11 AIRPORT HEALTH AND SAFETY

Health and safety at Southampton Airport is regulated by a number of enforcing authorities including the CAA, Health and Safety Executive, Eastleigh Borough Council and Hampshire Fire and Rescue Service.

## 4.12 AERODROME SAFEGUARDING

An aerodrome is defined by the Civil Aviation Authority as: "Any area of land or water designed, equipped, set apart or commonly used for affording facilities for the landing and departure of aircraft..." Aerodrome safeguarding is the important process by which Southampton Airport protects the aerodrome from the intrusion of obstacles, such as buildings or telephone masts.

The dimensions of Southampton Airport's aerodrome dictate the maximum acceptable heights for nearby buildings and other structures. These potential obstacles, which include trees and also temporary structures such as cranes, need to be managed to ensure the ongoing safe operation of aircraft visiting Southampton Airport.





Safeguarding of Aerodromes is a process of consultation between local planning authorities and airport operators. The process is intended to:

- Ensure that an airport's operation is not inhibited by developments, buildings or structures which might infringe the aerodrome's obstacle limitation surfaces
- Protect visual flight paths, for instance by ensuring that runway approach lighting is not obscured by development, and that lights elsewhere cannot be a cause of confusion
- Protect the accuracy of radar and other electronic aids to air navigation, for example by opposing wind farm developments where turbine blades could generate an intermittent return on air traffic controllers' radar screens
- Reduce the hazard from bird strikes to aircraft, associated with land uses such as waste disposal, sewage treatment and areas of water.

Local planning authorities are issued with safeguarding maps which enable them to identify those planning applications on which Southampton Airport must be consulted. As a consequence of this consultation process Southampton Airport may object to the proposal, not object, or not object subject to the application of appropriate conditions.

#### 4.13 PUBLIC SAFETY ZONES

The risk of air accidents occurring within, and in close proximity to, airports has long been the subject of Government policy, through the clear definition of Public Safety Zones (PSZs) which extend backwards from a runway's landing threshold. PSZs are the means by which airport operators identify areas where the risk of an aircraft accident, while extremely low, may be such as to merit some restrictions on the use of land.

The PSZs were originally calculated in 1999 based on the standard CAA methodology of looking ahead 15 years at movement forecasts. These were subsequently updated by the CAA in 2010 and the CAA are currently reviewing the process for the renewal of PSZs. They were defined through Government studies of the risk of death or injury to people on the ground in the event of an aircraft accident on take-off or landing at the UK's busiest airports. The basic policy objective is that there should

be no increase in the number of people living, working or congregating in PSZs and that, over time, the number should be reduced as far as circumstances allow.

In addition, the Secretary of State has asked that all occupied residential properties and commercial and industrial properties occupied as normal all-day workplaces, within an area of greater risk, are emptied. The area is defined in the 1 in 10,000 contour. There are no such properties in the Southampton Airport contour. It is the responsibility of the local authority to ensure that the directions given by Government relating to PSZ's are fully adhered to.

A plan of the public safety zone can be found at [www.southamptonairport.com/masterplan](http://www.southamptonairport.com/masterplan)

#### 4.14 ENVIRONMENTAL REGULATION

Southampton Airport operates within the context of a variety of nationally applicable policies and standards relating to the environment. These are described in detail in Chapter 7.

#### 4.15 ECONOMIC REGULATION

The Civil Aviation Act 2012 sets out the legal framework governing the economic regulation of airports in the United Kingdom.

Airlines are required to pay for the air traffic control services for the airspace through which they fly. This service is provided at Southampton by NATS. There is also a Government tax, Air Passenger Duty, which is levied and paid directly to the UK Treasury.

# 5. Growth Forecast 2017-2037

## 5.1 INTRODUCTION

In A Vision For Sustainable Growth, long-term air traffic forecasts for Southampton Airport cover the period up to 2037. The forecast methodology used to develop the long-term forecasts is based on established industry practices that combine econometric analysis, market analysis and industry trends.

## 5.2 FORECAST METHODOLOGY AND ASSUMPTIONS

The medium term (2017-2027) traffic forecast uses a bottom-up route level approach and is based on the level of market capture of passenger demand within the Southampton Airport catchment area.

Due to the short length of the existing runway, Southampton Airport currently has a limited route network range with services primarily provided by regional airlines such as Flybe operating medium sized (70-120 seats) regional aircraft such as Bombardier Q400 and Embraer 175/195 jets. The main assumption made for the medium term forecast is that a runway starter extension would allow larger narrow-body aircraft, such as the Airbus A319/A320 and Boeing 737-800 with 150-190 seats, to operate without major restrictions to a more distant and much wider route network from Southampton Airport, covering a range of European destinations.

The investment in a runway starter extension should enable Southampton Airport to attract new carriers to both capture existing demand and stimulate significant traffic growth. This additional traffic would in the main be passengers from Southampton Airport's existing catchment who currently fly primarily from the London airports, since the destinations are not currently served from Southampton Airport.

Southampton Airport has for many years lagged behind other UK regional airports in providing a comprehensive range of European air services to its core catchment population. Much of this deficiency can be attributed to Southampton Airport's limited operational capability, which

means it cannot cater for the larger narrow-body aircraft used by most short haul airlines, hence the need for the runway starter extension.

Based on a detailed analysis of the existing catchment market size, it has been demonstrated that there is sufficient demand to support a low cost airline base, developing over a period of time flying primarily to European leisure and city destinations.

With the provision of a runway starter extension, Southampton Airport should be able to capture a much larger proportion of the demand from its core catchment for the short-haul European market and thereby bringing it more closely in line with the scale of other UK regional city airports serving their catchment area.

The long term forecast projects a much more stable and moderate growth rate in line with overall growth in population income and GDP.

The methodology used for the long-term passenger forecast groups routes into three categories, namely UK domestic, international travel and Common Travel Area (CTA). The CTA is special travel zone which includes the Republic of Ireland, Isle of Man and the Channel Islands. Different GDP elasticities for the different passenger and route types are used, with the elasticities being in-line with UK DfT elasticity estimates.

One key consideration in the forecast process was the work of the UK Airports Commission which was tasked with recommending the location for a new runway in London. It concluded in 2015 that the preferred solution was a third runway at Heathrow Airport. The proposed new runway is not expected to open until 2026 at the earliest, so in the next decade, Southampton Airport will benefit from an increasingly large deficit of airport capacity in the South East of England. Southampton Airport is assumed to continue to attract a higher share of the traffic generated within its immediate catchment area, so that by the date of the opening of a new runway at Heathrow, Southampton Airport is forecast to have a mature and established route network.

## 5.3 PASSENGER FORECAST

Overall passenger volumes at Southampton are forecast to grow from 2m in 2017 to 4m by 2027. This growth is largely driven by new airline operations, which are assumed to start operations following the construction of a runway starter extension.

Once Southampton Airport captures and develops its route network by 2027, the growth rate is assumed to fall in-line with the forecast national growth rate, with traffic reaching around 5m by 2037.

The main traffic growth between 2018 and 2027 would be driven by the international market sector with overall growth of 23.5% followed by CTA traffic at 3.2% and domestic traffic at 0.7%.

Over the whole forecast period to 2037 the growth in passenger numbers is 4.6% per annum. This compares to the last 20 years where the average annual growth was 6.5% per annum. International traffic is forecast to grow by 8.0% to 3.2m passengers by 2037. This compares to average annual growth in international traffic of 9.3% over the last 20 years. Domestic traffic growth is forecast to moderate to an average growth rate of 1.1% between 2017 and 2037, having grown at an average 8.6% per annum in the last 20 years.





#### 5.4 AIR TRANSPORT MOVEMENT FORECAST

Passenger Air Transport Movements (ATMs) are forecast to increase from 39,300 in 2017 to 57,800 by 2037 (CAGR = 1.4%). Over this period the number of passengers per ATM is forecast to increase by 3.1% per annum. This large increase in passengers per ATM is largely driven by the introduction of larger narrow-body aircraft operated by the new airlines. While growth in low cost airline traffic will continue, especially in the international markets, smaller regional aircraft are expected to continue to have a large presence at Southampton Airport, especially within the domestic and CTA markets, given their competitive advantage offering fast and convenient access to a number of UK and European regional centres.

**FIGURE 5: AIR TRANSPORT MOVEMENTS**

2017 (ACTUAL)	2027	2037
39,300	53,100	57,800

Commercial Passenger ATM Forecast

**FIGURE 6: ATM GROWTH RATES**

2017 - 2027	2027 - 2037	2017 - 2037
2.9%	1.2%	1.4%

#### 5.5 AIRCRAFT PARKING STAND DEMAND

Forecasts for commercial aircraft parking stand demand have been produced for the long term years of 2027 and 2037 using 2017 actual figures as the base line. The demand for aircraft stands is forecast to grow from 14 in 2017 to 17 by 2037, in line with the growth in passengers.

**FIGURE 7: AIRCRAFT STAND DEMAND**

YEAR	NO. OF STANDS
2017	13
2027	13
2037	17

# 6. Infrastructure Requirements 2017-2037

## 6.1 INTRODUCTION

This chapter describes the additional infrastructure and facilities required to support the growth of Southampton Airport in the short term up to 2027 and then outlines longer term proposals for infrastructure provision to 2037.

Based on forecast demand, it is expected that by 2027 Southampton Airport will be handling approximately 4 million passengers per year. Within this timescale, it is considered that airport development can be accommodated on land currently owned by or in the control of Southampton Airport.

Any development will be phased, to ensure as far as possible that additional capacity closely matches passenger demand and minimises the impact on airport operations. If traffic grows faster than is currently predicted, then it may be necessary to advance some of the expansion plans. Similarly, any slow-down in growth would be reflected in development of new facilities at a later stage. The exact timing of the developments outlined in this following section will, where appropriate, be subject to detailed environmental and financial evaluations.

### 6.2 2017 TO 2027 – THE 10 YEAR PLAN

Between 2018 and 2027 a number of infrastructure upgrades and improvements will be needed to keep pace with the forecast increase in passenger numbers and maintain as well as develop Southampton's excellent service reputation. These will include extra passenger terminal capacity, a runway starter extension, more car parking facilities, additional aircraft taxiway and aircraft parking stand upgrades.

## 6.2.1 PASSENGER TERMINAL

Additional terminal capacity will be essential to handle the anticipated increase in passenger numbers, whilst ensuring passenger comfort and the fast-track nature of the airport is maintained.

Additional check-in facilities will be required alongside the relocation of passenger security screening facilities to accommodate the predicted growth. New check-in technologies, such as self-service boarding pass kiosks and automated baggage drop-off points, will be promoted to optimise and enhance the check-in product.

Passenger comfort will be improved through an enhanced and enlarged retail, duty free and food and beverage offer. A new modern and spacious airport executive lounge will be realised as part of the terminal redevelopment.

To enable the provision of enhanced terminal facilities and accommodate the increased passenger volumes, a modest extension to the terminal building will be required. This extension will house new arrivals facilities consisting of an enlarged immigration hall and new baggage reclaim devices for international and domestic arriving passengers.

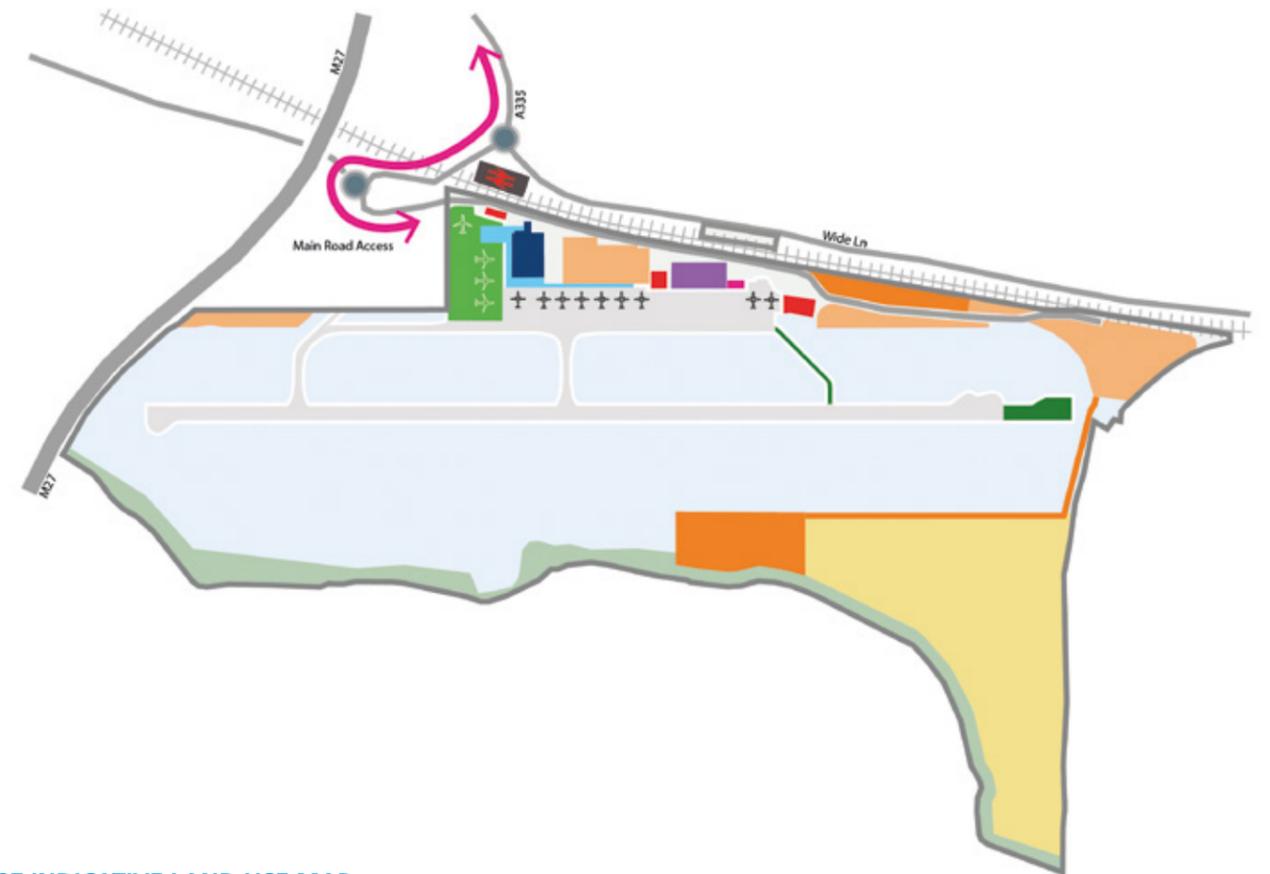
To maintain the breeze-through nature of the airport, a passenger walkway is proposed that will link the majority of aircraft parking stands currently accessed by bus to the reconfigured departures lounge and the new arrivals building. All passengers departing and arriving from aircraft parking stands 1 to 12 will use a new walkway with the remaining remote stands served by a coach operation when in use. The walkway will be configured in such a way that arriving and departing passenger flows will not be able to mix. In addition, there will be an ongoing programme of refurbishment and renewal of existing facilities, to ensure that Southampton Airport can respond to changes in technology, airline needs, passenger expectations and commercial developments as appropriate.



FIGURE 8: SOUTHAMPTON AIRPORT INTERNAL IMMIGRATION

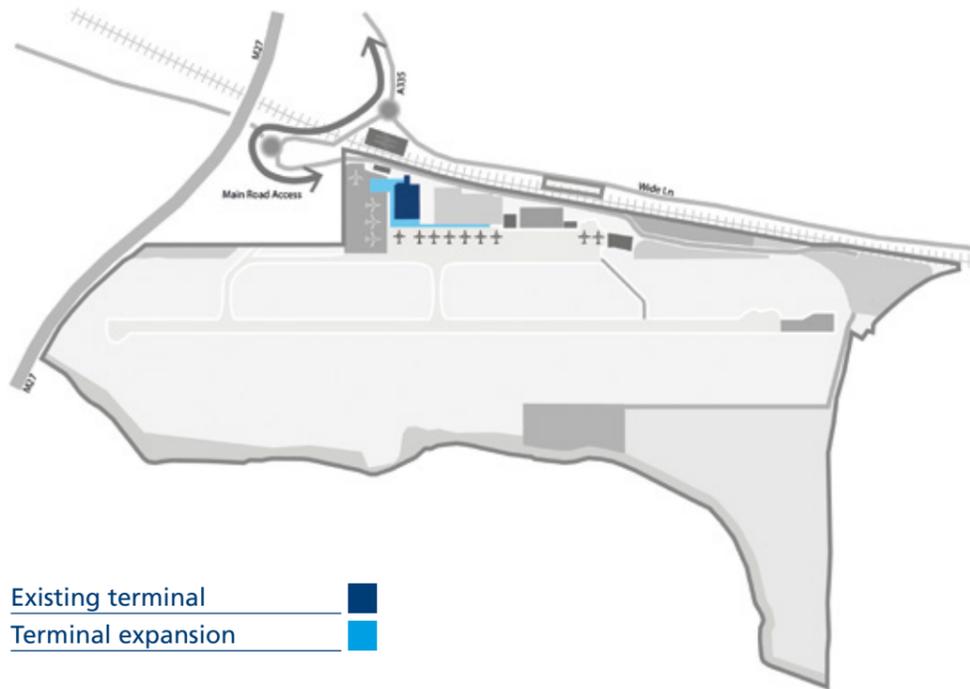


FIGURE 9: SOUTHAMPTON AIRPORT INTERNAL LOUNGE



2027 INDICATIVE LAND USE MAP

### TERMINAL DEVELOPMENT



- Terminal expansion
- New passenger walkway
- Increased car parking
- Runway starter extension

not be the need for an increase in the number of aircraft parking stands. To accommodate both the proposed terminal expansion and larger modern aircraft types such as the A320 (Airbus) and B737 (Boeing), a number of stands will be relocated and/or upgraded. To allow for more efficient construction of the terminal expansion, two additional aircraft parking stands may be constructed either on a temporary or permanent basis. This will provide a buffer in capacity to enable the temporary closure of stands around the terminal to enable the proposed expansion works.

### 6.2.3 CAR PARKING

To meet the overall increase in car parking demand, the development of additional short stay and long stay car parking facilities on the available airport land to the west of the runway will be maximised. Additional car parking spaces may be provided in the North East Zone. This area is more suited to long stay car parking and the car parking pricing structure will be used to balance supply and demand for short stay and long stay spaces.

### 6.2.2 AIRFIELD

#### AIR TRAFFIC CONTROL/AIRSPACE

In preparing this plan, an assumption has been made that the capacity of the airspace surrounding Southampton Airport, and the airspace across England and the UK in general, will be able to accommodate the forecast growth in traffic.

### 6.2.4 CARGO

While cargo flights do not operate from Southampton Airport, it is envisaged that the current operation with cargo being carried in passenger aircraft holds will continue as it is.

#### RUNWAY AND TAXIWAY SYSTEM

It is proposed that as part of the developments to 2027 the northern end of the runway will be extended by up to 170 metres, which would be accommodated on existing land owned by Southampton Airport. This will allow aircraft to operate with reduced weight restrictions and aircraft range to be increased. This will in turn lead to more destinations being served, bringing more Mediterranean summer holiday and winter sun leisure destinations into reach of Southampton Airport. To improve runway capacity and reduce the time aircraft occupy the runway, a short section of new taxiway is proposed, extending the existing taxiway to the northwest and linking it to the runway.

### 6.2.5 AIRCRAFT MAINTENANCE

It is envisaged that the current maintenance facilities will be sufficient in size and location up to 2037.

### 6.2.6 ANCILLARY FACILITIES

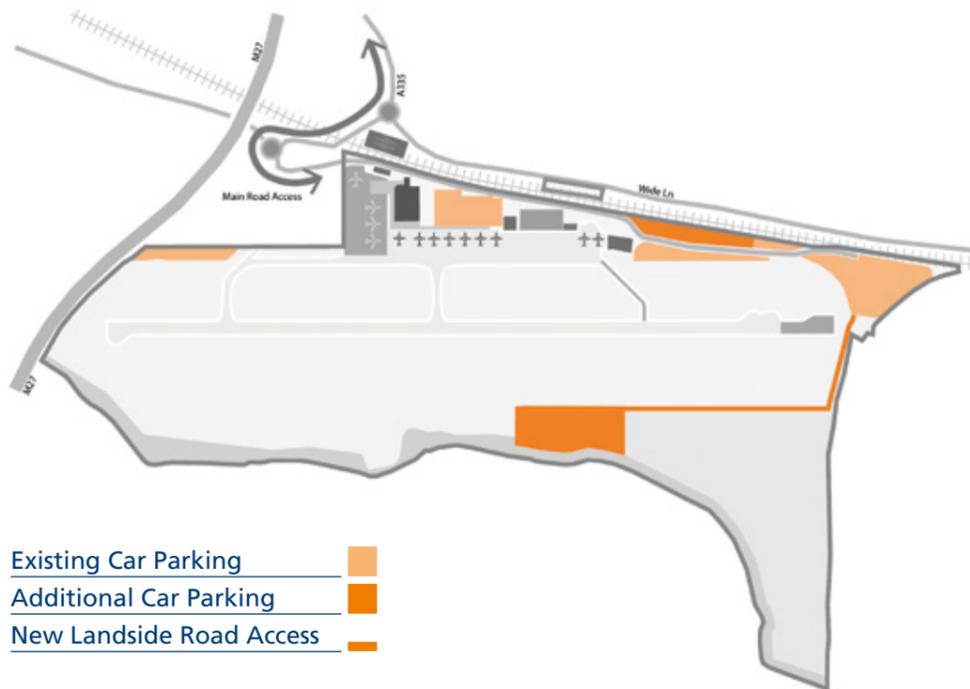
As the number of passengers increases, the demand for land to accommodate support services will also increase. It is anticipated that this will be accommodated on land currently owned by Southampton Airport.

The fuel farm site is capable of being expanded to cater for the fuel storage needs arising from the anticipated air traffic growth at Southampton Airport up to 2037. Sufficient land will be safeguarded to enable this expansion.

#### AIRCRAFT APRONS

The forecast demand in 2037 is for 13 commercial aircraft parking stands. Based on this forecast demand there may

### CAR PARK EXPANSION MAP



### 6.2.7 LANDSCAPING

As Southampton Airport develops, appropriate landscaping provisions will be made to maintain the existing high standards. The landscaping, however, will not compromise aircraft safety through the attraction of birds to the airfield.

On the eastern side of the airfield, Southampton Airport will endeavour to maintain the current minimum of a 30 metre landscaped buffer between Southampton Airport and the Itchen Valley Country Park, which will aim to develop and maintain habitats in this designated Site of Special Scientific Interest (SSSI) and reduce any potential visual impacts.

### 6.2.8 NORTH EAST ZONE – SOUTHAMPTON AIRPORT ECONOMIC GATEWAY (SAEG)

In addition to the stands, apron and car parking described, the North East Zone will also be available for commercial activities. These activities are assumed to be of such a nature that future development is consistent with airport development options.

The SAEG is located around Southampton Airport primarily within Eastleigh borough, close to the boundary with Southampton. Eastleigh falls wholly within the areas covered by the Partnership for Urban South Hampshire (PUSH) and the Solent Local Enterprise Partnership (LEP). Employment led growth is a priority for these wider areas with which Eastleigh's economy is inextricably linked.

The SAEG as a whole covers approximately 137 hectares and benefits from an attractive setting and strong transport connectivity. It is adjacent to Eastleigh and Southampton Airport Parkway rail stations and sits between the Itchen Valley Country Park to the east, the London-Weymouth railway line to the west and the M27 motorway to the south.

The potential of the SAEG was identified by PUSH and by Eastleigh Borough Council as the then, 'South Hampshire Strategic Employment Zone' and was more recently designated as 'Eastleigh River Side' and its adjoining development opportunities (policies E9, E10 and E12). The potential of the hub has also been recognised by the Solent LEP as the 'Ford-airport-Riverside' pipeline site, with the redeveloped site supported as a prestigious gateway that will add high quality jobs, supply chain opportunities and make a major contribution to the Solent area's inward investment potential.

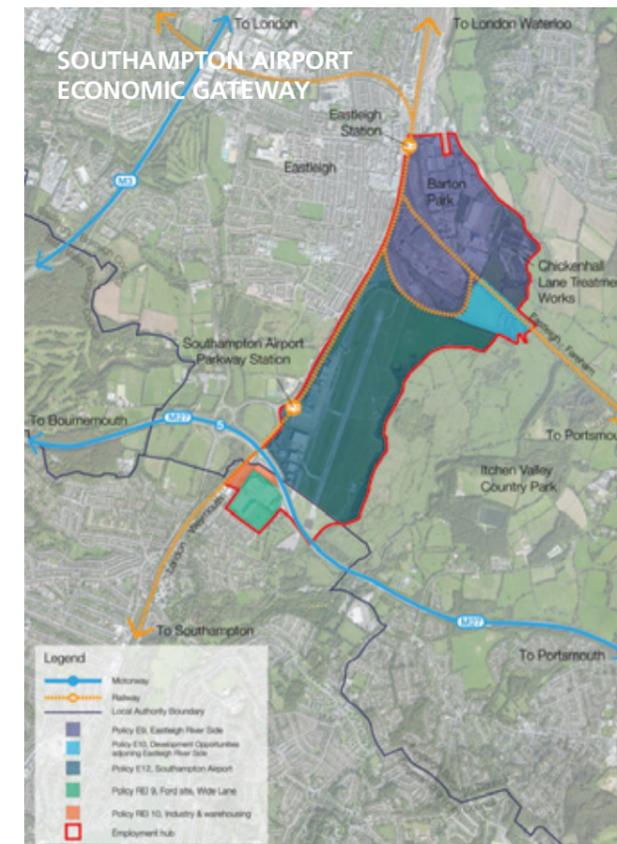
The land owned by Southampton Airport accounts for 22 hectares. Of this, four hectares would be protected for airport operational development allowing the remaining area to be developed for non-airport related mixed use. Historically, proposals to bring forward this land for development have relied heavily on the delivery of access proposals such as the Chickenhall Lane Link Road, with associated costs of up to £120 million. The NE Zone is recognised as having fewer access constraints and has the potential to act as catalyst for the development of the SAEG. It is clear that transport interventions are needed to open up the sites around the airport to achieve their development potential. Options for transport interventions will be considered focusing on road access, on lower cost and deliverable schemes and on making better use of existing infrastructure (e.g. Wide Lane). A deliverable access solution could be identified for the Northern Business Park in the very short-term to support incremental delivery of the site. It is also important to consider the potential longer-term access plan for the wider area, so that interventions developed in the short-term do not preclude or obstruct potential longer-term solutions.

## 6.3 LAND USE 2028 TO 2037

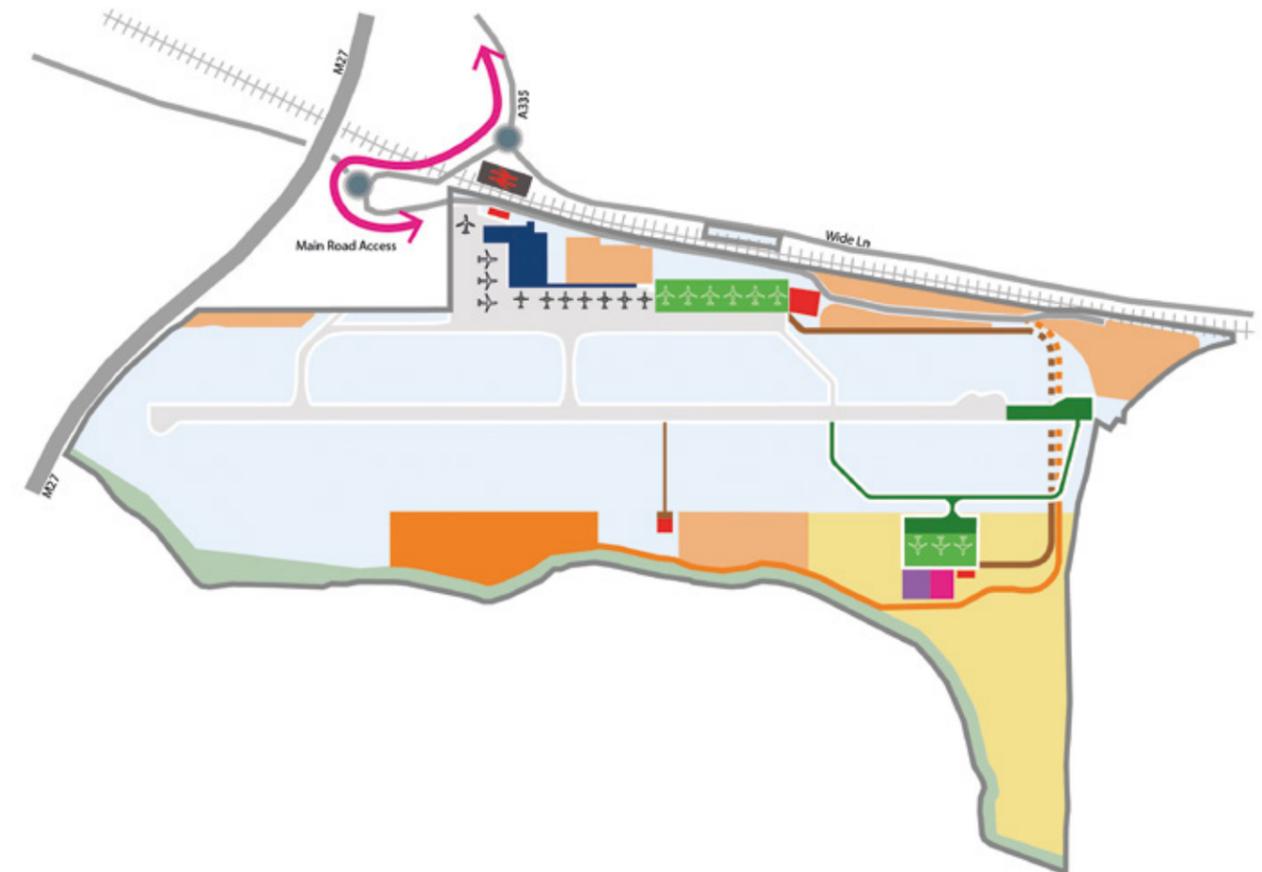
This section of Our Vision For Sustainable Growth provides an overview of the future development of Southampton Airport between 2028 and 2037, given the information available at present. It outlines a long term but less detailed development strategy which would allow Southampton Airport to grow to 5 million passengers per year.

### 6.3.1 PASSENGER TERMINAL FACILITIES

The increase in passenger numbers means that additional processing facilities will be required to ensure a quick and efficient passenger journey through the terminal is retained. Additional check-in desks, security screening and immigration facilities will be provided to accommodate the forecast passenger demand.



	Existing	Future Expansion
Terminal	Dark Blue	Light Blue
Car Parking	Orange	Light Orange
Runway / Taxiway	Grey	Dark Green
Apron	Light Grey	Light Green
Airport Development Zone	Yellow	
Landscape Buffer Zone	Light Green	
Maintenance	Purple	
Ancillary	Red	
Cargo	Pink	
Southampton Airport Parkway	Black	
Rail	Grey with cross-ticks	
New Landside Road Access	Grey	Orange



2037 INDICATIVE LAND USE MAP



### 6.3.2 AIRFIELD

#### AIRCRAFT APRONS

Commercial aircraft parking stand demand is anticipated to increase to 17 by 2037 as shown in chapter 7. This will mean that an additional 4 aircraft stands are required between 2028 and 2037. To continue operating Southampton Airport in the most efficient way, by keeping the operation as close to the terminal as possible, it is envisaged to relocate the existing parking and maintenance hangars and cargo facilities to the North East Zone and provide the required passenger aircraft parking stands on their former site.

These new aircraft stands will be sized to accommodate the current largest narrow body aircraft such as the A320 and B737. The two existing stands located south of the fuel farm will also be upgraded to accommodate these larger aircraft.

#### ANCILLARY FACILITIES

As commercial aircraft stands are proposed to be provided on the site where cargo and maintenance facilities are currently located, cargo and maintenance facilities will be relocated to the North East Zone.

To better utilise the highly limited site area available on the west side of the runway, it is proposed to relocate additional ancillary facilities to the east of the runway. It is proposed to relocate the air traffic control tower and the rescue and firefighting station to the east of the runway to accommodate additional commercial aircraft parking stands on the west side. This will ensure a maximum level of safety.

The fuel farm site is capable of being expanded to cater for the fuel storage needs arising from the anticipated air traffic growth at Southampton Airport up to 2037. Sufficient land will be safeguarded to enable this expansion.

#### RUNWAY AND TAXIWAY SYSTEM

Based on the development of facilities in the North East Zone, a new taxiway is proposed to connect these facilities to the runway, as well as linking the western passenger aircraft aprons to the northern runway end via a runway crossing. This will offer greater operational flexibility by reducing runway occupancy times and increasing runway capacity.

### 6.3.3 CAR PARKING

To meet the overall increase in car parking demand, additional long term car parking spaces may be provided in the North East Zone

**FIGURE 10: NUMBER OF CAR PARKING SPACES**

2017 (ACTUAL)	2027	2037
2,865	5,562	6,877

Car Parking Requirement 2017 – 2037

### 6.3.4 NORTH EAST ZONE

The remaining land in the North East Zone would be available for commercial development by either Southampton Airport or a third party.

To connect the west side of Southampton Airport with the North East Zone a road tunnel is proposed. Passengers will be able to park their car in the long term car park and it will ensure easy and quick access for the potential commercial business park. A separate tunnel will be provided to allow airside vehicle access to and from the ancillary facilities.

# 7. Corporate Social Responsibility

## 7.1 INTRODUCTION

Southampton Airport is committed to honesty, integrity, and transparency and it aims to embrace responsibility for its actions at all times. Southampton Airport believes that corporate social responsibility, environmental preservation and the safety of its employees are core values. We work hard to ensure a balance is maintained between social and economic benefits to the UK and its communities and the environmental impacts of aviation.

Southampton Airport is committed to providing a safe and healthy work environment for its employees as well as the community in which it operates. This determination to continually improve, minimise environmental impacts and reduce the depletion of natural resources is enabled by maintaining beneficial working relationships with a wide range of stakeholders, in a way that promotes the social and economic benefits. Southampton Airport seeks, wherever possible, to minimise the negative impact of operations. Corporate social responsibility strategy and goals are communicated to employees and stakeholders, and progress is measured and reported on regular intervals.

## 7.2 CORPORATE SOCIAL RESPONSIBILITY STRATEGY

Southampton Airport's Corporate Social Responsibility (CSR) is defined by significant topics that are important to local communities, customers and stakeholders. By identifying these topics, we are able to focus on and implement changes and improvements in these areas which can potentially have a large impact on the business.

To guarantee that each of these topics was prioritised correctly, Southampton Airport engaged with stakeholders to develop a materiality matrix. This matrix ensures that the appropriate level of importance is assigned to each topic, and is reviewed every three years.

The topics identified and prioritised through the materiality matrix are topics of most interest to stakeholders. They are of the highest importance to the business too, certifying that we have the correct shared priorities.



BITTERNE PARK SCHOOL

### KEY PRIORITIES WITHIN THE CORPORATE SOCIAL RESPONSIBILITY STRATEGY:



#### Environmental Management

- Noise pollution and management
- Air quality
- Climate change
- Waste and recycling management
- Biodiversity management



#### Economic Growth and Operational Management

- Compliance with laws and regulations
- Safety and security
- Information security
- Ethical business practices



#### Collaboration with Our Community

- Community impacts of operations
- Stakeholder engagement
- Engagement with local schools



#### Leading our People

- Health and safety
- Employee retention and turnover
- Employee wellbeing

## SOUTHAMPTON AIRPORT CONSULTATIVE COMMITTEE

Southampton Airport recognises the importance of working collaboratively not only with business partners but also with external stakeholders. Collaborative engagement is key to the Corporate Social Responsibility Strategy and forms part of how Southampton Airport engages with the community.

A key way of engaging with the local community is through the Southampton Airport Consultative Committee which is made up of a wide range of stakeholders including local councils and officers, residents' associations, industry bodies and disability groups.

Consultative committees were established many years ago to work with the aerodrome operators, communities in the vicinity of the aerodrome, local authorities, local business representatives, aerodrome users and other interested parties to exchange information and ideas. The consultative committee also allows the concerns of interested parties to be raised and taken into account by the aerodrome operator, with a genuine desire by

all participants to resolve any issues that may emerge. Furthermore the consultative committees work to complement the legal framework within which airports operate.

## FLYING CONTROLS AGREEMENT

Southampton Airport operates under a closely monitored Flying Controls Agreement which encompasses a range of measures to safeguard the natural environment and the local community, and minimise noise.

The agreement covers the following areas: night time closure, runway length and alignment, types of aircraft, flight training, helicopter operations, ground running of aircraft engines, aircraft vortices, preferred routeing of aircraft and air quality.

Southampton Airport's compliance with the Flying Controls Agreement is met, and in many cases exceeded. This is monitored by Eastleigh Borough Council and the Southampton Airport Consultative Committee at its meetings which are held three times per year.

## 7.2.1 NOISE MANAGEMENT

### NOISE POLLUTION AND MANAGEMENT

For some people living under flight paths or close to Southampton Airport, noise is a concern and its effective management is an important part of our ability to develop in a responsible way.

Southampton Airport works in partnership with its airline business partners to make further progress in managing the noise impacts of their operations. This is evident through the advancement in aviation technology so that although aircraft may be larger they are also quieter than those produced 10 or 20 years ago.

We have created a Noise Action Plan which has been updated in 2019. This plan includes a range of objectives and measures to manage noise and is published on the Southampton Airport website.

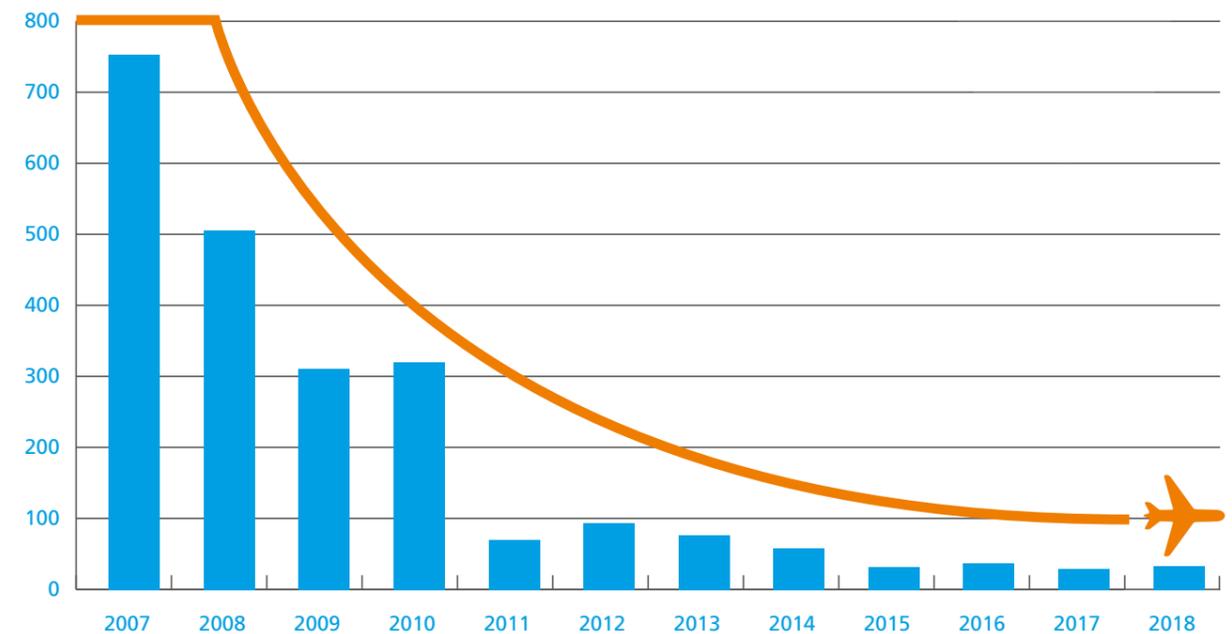
## SUMMARY OF NOISE MANAGEMENT INITIATIVES

Southampton Airport has identified a number of ways in which it manages the noise impact on its local community, many of which are detailed in the Flying Controls Agreement:

- No scheduled night flights
- Night closure hours are defined as 23:00 - 06:00 Monday to Saturday.
- On Sunday mornings, night closure hours extend until 07.30.
- There are limited exceptions to this, which may include delayed aircraft movements and medical emergency flights. There is a provision for a maximum of 10 aircraft movements in a calendar month and 100 in a calendar year during night hours.



FIGURE 11: HISTORIC NOISE COMPLAINTS STATISTICS



## **NOISE PREFERRED ROUTEINGS FOR AIRCRAFT**

We will continue to work with the Consultative Committee to develop aircraft routes that minimise noise impacts to local residents whilst also considering safety and carbon emissions management. Southampton Airport, in conjunction with NATS, ensures, as far as is reasonably possible, that aircraft use the preferred routes.

Southampton Airport, in conjunction with the Consultative Committee, and in consultation with local stakeholders, agrees the location of Noise Preferred Routes for departing and arriving aircrafts. These routeings are designed to minimise the noise impact on the local community, by diverting aircraft away from the most populated areas, where practically possible.

Southampton Airport will continue to investigate the best possible routeings taking into account advances in aircraft technology and local housing developments.

## **BAN ON NOISIER TYPES OF AIRCRAFT**

Large and noisy aircraft which do not meet or exceed the standards of ICAO Annex 16 Chapter 3 or FAA FAR Part 36 Stage 3 (commonly referred to as 'Chapter Three' aircraft) or aircraft powered by Rolls Royce Viper jet engines, remain not permitted at Southampton Airport.

## **LIMITS ON HELICOPTER MOVEMENTS**

Helicopter movements are restricted and are not allowed to exceed 7,500 movements in any calendar year. In recent years there have been substantially less than the maximum number of movements.

## **RESTRICTIONS ON TRAINING FLIGHTS**

Training flights by jet aircraft and helicopters are only allowed in relation to air crew familiarisation with Southampton Airport. This is for a maximum of 3 consecutive days and not for more than 1 hour's training on each of the 3 days.

## **AIRCRAFT ENGINE TESTING**

Southampton Airport operates a strict control on engine testing. This excludes engine running as part of starting up, pre-flight checks, idling or aircraft taxiing. All testing must take place between 08:00 and 21:00 hours Monday - Saturday. Engine testing is banned completely on Sundays and Bank Holidays. The maximum time allowed for ground running of engines is 1 hour in any day or 3 hours in any week. The location of engine testing is monitored to ensure that noise impact on local residents is kept to a minimum.

## **WORKING WITH AIRLINE PARTNERS TO REDUCE NOISE AND OTHER ENVIRONMENTAL IMPACTS**

Southampton Airport actively engages with its airline business partners to minimise noise disturbance wherever possible and works with them through a number of forums such as the Airline Operators Committee and Flight Operations and Performance Committee.

Through engagement with airline partners, Southampton Airport recently introduced 'engine idle' taxiing, where only one engine is used to manoeuvre the aircraft to and from the stands after landing. This has several environmental benefits including ground noise reduction and lower carbon dioxide emissions as well as reducing fuel burn and costs.

## **COMMUNITY LIAISON**

Part of the Corporate Social Responsibility Strategy is to engage with the local community. To this end Southampton Airport values the feedback it receives and has invested in a number of initiatives including an annual charity sponsorship programme, localised support to local charities as well as support to specific local schools and colleges to ensure good relations with its neighbours.

There is a dedicated Noise and Flight Evaluation Unit which handles the feedback received from the local community about aircraft noise and routeing. This unit is able to answer questions about specific areas of concern.

## **NOISE MONITORING AND CONTOURING**

It was agreed with the Southampton Airport Consultative Committee that noise monitoring at strategic locations is carried out to better inform its noise management programme. Southampton Airport uses a government approved method which uses contours to assess the noise created by aircraft taking off and landing at an airport over a period of time.

Noise footprints are a different measure and are used for depicting single aircraft noise events, for instance one take-off

or landing of a particular flight. Noise contours can represent historical noise impact and can also be used to show future forecast noise levels. As a result, it is possible to quantify changes in the area and population exposed to different levels of noise.

Contours will be developed every five years as a minimum, in line with the requirements of the Environmental Noise Directive, and noise contour maps for 2016, 2021 and 2037 can be viewed in appendices 4, 5 and 6.

## **NOISE UP TO 2037**

The CAA provides guidance to airports on noise mitigation issues and Southampton Airport will continue to follow and comply with these in the future.

Southampton Airport will continue to operate within its current operating hours. With this in mind the suggested noise contours for 2021 and 2037 are similar in shape to those for 2016, but cover a slightly different area.

This is not unexpected as although they assume an increased level of activity, there will be significant use of the quieter re-engined, more modern aircraft, plus aircraft will be able to climb faster and higher using the proposed runway starter extension at the northern end of the airfield.

In addition to residential properties, noise can potentially have effects on hospitals or schools. The Government only expects airport operators to offer acoustic insulation to hospitals and schools exposed to medium to high levels of noise. There are no hospitals or schools identified within those contour ranges.

Our updated Noise Action Plan was formally adopted by DEFRA in February 2019, as required, by the Environmental Noise Directive and the Environmental Noise (England) Regulations 2006 (as amended). It has subsequently been published and remains available on our Southampton Airport Website.

As part our continuous drive to better understand our environmental impact, Southampton Airport has committed to undertaking extended noise monitoring in the communities which airlines using SIAL fly over. The extended monitoring has been designed in such way as to ensure that it is repeatable in subsequent years; so the noise monitoring can be undertaken under different operating scenarios, for example to capture summer operations and following the opening of the proposed runway starter extension.

## **AIRSPACE MODERNISATION STRATEGY**

Current airspace was designed for an age when aircraft and navigation was much less sophisticated. A major airspace modernisation programme is already underway across all of the UK.

A change of this scale and complexity requires the active involvement of a wide range of industry stakeholders. In recognition of this, the Aviation Minister wrote to all major airports seeking their commitment to a programme of airspace modernisation covering the South of England – called the Future Airspace Strategy Implementation South Programme (FASI-S).

The main aims of the strategy are:-

- to make the airspace more efficient;
- improve punctuality;
- cut CO2 emissions;
- reduce noise from less aircraft-holding at low levels;
- to ensure there is capacity to meet future demand.

Along with 16 other airports, Southampton Airport is fully engaged in this process which will involve the re-design of its departure and arrival routes and procedures up to 7000 feet.

## **PERFORMANCE BASED NAVIGATION**

The introduction of Performance Based Navigation (PBN) is the key to achieving airspace modernisation. PBN improves the accuracy of where aircraft fly by moving away from outdated and conventional navigation using ground-based beacons, to modern satellite navigation.

PBN is being introduced across the world. This new technology allows more flexible positioning of routes and enables aircraft to fly them more accurately. This helps improve operational performance and reduce delays. It also provides opportunities to avoid noise sensitive areas.

PBN flight paths will be narrower and more concentrated than they are today and we understand that this may be a concern to some local communities. Southampton Airport is committed to working with residents, local stakeholders and the aviation industry to find ways to introduce PBN while seeking to limit negative effects from aircraft noise.

As Southampton Airport's routes are redesigned we will increase the use of PBN to meet our commitments to the Government's airspace modernisation strategy.

## 7.2.2 AIR QUALITY

Air quality is affected by emissions of chemicals and particles from human activity as well as from natural sources. In the UK, emissions are predominantly generated as a result of the combustion of fossil fuels through transport such as vehicles, trains and aviation. The pollutants which present the greatest challenge in the UK are nitrogen dioxide (NO<sub>2</sub>) and fine particulates (PM<sub>10</sub>).

Road traffic is the single largest emission source of fine particulates (PM<sub>10</sub>) and nitrogen oxides (NO<sub>x</sub>), although other sources, such as power generators, domestic and industrial boilers and industrial processes also produce these pollutants.

A range of activities within and around an airport can affect local air quality. These include airside vehicles and airborne and ground level aircraft activity, as well as vehicles travelling to and from the airport. The Government has set a series of objectives for atmospheric pollutants; these are set out in the UK National Air Quality Strategy and are based on the principle that polluting emissions and ambient air must not cause harm to human health and the environment.

### AIR QUALITY STRATEGY 2018 - 2027

#### SUSTAINABLE TRANSPORT

The partnership established with Eastleigh Borough Council and the other local authorities through the Consultative Committee works to ensure that Southampton Airport plays a full part in improving the local environment. Reducing pollution from car users and encouraging passengers to use public transport is a key part of the Air Quality Strategy going forward.

We will continue to work with public transport providers to increase the number of passengers using bus, coach, rail or bicycle, and thus reducing the reliance on individual cars.

Further details relating to surface access initiatives are included in Southampton Airport's Surface Access Strategy. Full details can be found on the Southampton Airport website.

#### PRACTICAL AIR QUALITY MANAGEMENT

Southampton Airport's engineering team looks for the most efficient way of minimising environmental impacts. An example of this is by using the advanced Building Management Systems (BMS) to monitor and reduce the use of energy at Southampton Airport.

There is a policy in place for the renewal of airside vehicles, to ensure that older vehicles are replaced by more environmentally friendly vehicles, which create fewer emissions. In future years, where economically viable, fixed ground power units will be made available for aircraft rather than using diesel ground power units.

Southampton Airport will continue to work with transport operators, specifically taxis and coaches, to ensure that vehicles are kept in good condition and are no older than 4 years old to ensure emissions are kept to a minimum. Southampton Airport utilises a range of incentives as well as penalties for clean versus polluting vehicles that are used in the airside environment at the airport.

#### EXISTING BASELINE AIR QUALITY STUDY

Southampton Airport works closely with Eastleigh Borough Council (EBC), to manage air quality. In 2016 in conjunction with EBC, an air quality study was undertaken by AMEC Foster Wheeler.

In general, whilst airport activities, and in particular, aircraft engines, can emit quantities of air pollutants, the effects of these emissions upon ambient air quality in the areas surrounding airports are relatively small. The more significant effects arise from road traffic emissions from vehicles on surrounding roads, a small proportion of which will be airport-related traffic.

The most significant finding of the air quality study is that only 1.7% of the total pollutants (NO<sub>2</sub>) are attributable to all airport activities. Comparatively, non-airport road traffic is noted to contribute 48.2% and background air pollution at 50.1%

## CURRENT LEGISLATION AND CLEAN AIR STRATEGY 2019

Following extensive feedback from the Master Plan consultation, Southampton Airport has committed to conducting extended air quality monitoring so we can gain a better understanding of our environmental impact. The extended air quality monitoring follows similar areas to the extended noise monitoring. We are conscious that many local councils already undertake extensive and thorough monitoring in these areas and we don't want to duplicate this. We will be working with these councils to ensure that this information is shared and any impacts from airport operations are identified.

With regards to air quality the broad locations are:

1. Hythe – New Forest District Council undertakes monitoring to the northwest of Hythe in Marchwood and Totton. All monitored locations show concentrations well within the air quality objectives. In the absence of local authority monitoring, we will be undertaking our own monitoring.
2. South Downs National Park - Winchester City Council does not have extensive monitoring in the park, therefore we are undertaking our own programme of monitoring.
3. Twyford/Shawford – Winchester City Council has a single air quality monitoring device in Twyford. We will monitor to understand current levels.
4. Bugle's Farm/Highbridge Farm – we will be undertaking our own programme of monitoring at these locations.

5. Local Authority Monitoring: Winchester Orbital Road; Eastleigh Centre; Southampton Centre. No purpose would be served by additional monitoring.

We welcome the Government's Air Quality Strategy 2019. This strategy sets out the comprehensive actions that it requires from all parts of government and society to meet these goals. The proposed new legislation will create a stronger and more coherent framework for action to tackle air pollution across the country.

In October 2016, the International Civil Aviation Organization (ICAO) agreed on a resolution for a global market-based measure to address CO<sub>2</sub> emissions from international aviation as of 2021. The agreed resolution sets out the objective and key design elements of the global scheme, as well as a roadmap for the completion of the work on implementing modalities. The Carbon Offsetting and Reduction Scheme for International Aviation, or CORSIA, aims to stabilise CO<sub>2</sub> emissions at 2020 levels by requiring airlines to offset the growth of their emissions after 2020.

Airlines will be required to:

- monitor emissions on all international routes;
- offset emissions from routes included in the scheme by purchasing eligible emission units generated by projects that reduce emissions in other sectors (e.g. renewable energy).

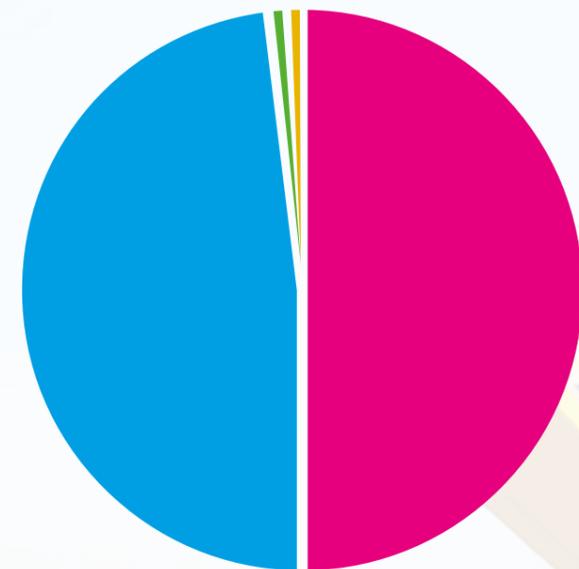
We are continuously working with our airlines to create sustainable aviation – looking for ways that we can reduce our carbon foot print as well as ways that we can help reduce theirs.



**AIR QUALITY STRATEGY UP TO 2037**

By 2037, passenger numbers are expected to have increased to approximately 5 million, and road traffic and aircraft movements are expected to increase accordingly. However, with a likely increase in the use of more sustainable means of access to Southampton Airport, combined with improvements in vehicle and aircraft emissions technologies, this increase is not expected to have a significant adverse impact on air quality.

**FIGURE 12: CONTRIBUTION OF DIFFERENT SOURCES TO AIR QUALITY**



Background	50.1%
Non airport Road Traffic	48.2%
Airport Road Traffic	0.9%
Ground Level Airside Operations	0.7%
Airborne Aircraft	0.1%

**FIGURE 13: SOLAR POWERED AIRFIELD LIGHTING**

**Southampton Airport supports sustainable development, and is committed to achieving carbon neutrality by 2030.**

**7.2.3 CLIMATE CHANGE - REDUCING ENERGY CONSUMPTION**

As a natural resource-dependent industry, Southampton Airport is always investigating ways in which it can become more energy efficient.

It will continue to introduce a range of energy saving devices to drive down energy usage. By reducing energy consumption it is indirectly reducing greenhouse gas emissions.

Southampton Airport has recently replaced existing lighting with more energy efficient systems, and was the first UK airport to install LED stand lighting. The short stay car park is fitted with an “intelligent” lighting system, which adjusts according to the natural light throughout the day. Solar lighting is also used at a number of locations including the safety lighting shown opposite on the airfield.

We are actively progressing our involvement with the Airport Carbon Accreditation (ACA) scheme. ACA has four levels and we are aiming to join at Level 2 which requires the airport to be able to independently demonstrate that we have reduced our carbon footprint on a rolling three year average as well as having effective carbon management procedures. We support sustainable development and continuous reduction in carbon emissions and are committed to achieving carbon neutrality by 2030.

We are now active members of Sustainable Aviation, and actively involved in the Cleaner, Quieter and Smarter working groups to ensure we are part of the solution to long term sustainable aviation.

Southampton Airport has a special monitoring system which enables it to be warmed or cooled in the most energy efficient way whilst maintaining a comfortable environment for customers. In all projects that require energy, innovative design solutions are sought to ensure improved energy efficiency is achieved.

**7.2.4 WASTE MANAGEMENT**

Waste is generated from a number of sources at Southampton Airport, notably from aircraft arriving and departing, catering outlets, offices, shops, construction activity and from vehicle and aircraft maintenance.

We implement a waste hierarchy approach to all waste generated on site. Zero waste is sent direct to landfill and targets are set for recycling which are reviewed regularly. The current target for recycling is 65%.

We constantly engage with business partners and waste vendors to identify improvements in waste facilities and recycling capabilities. If the waste cannot be recycled, it is sent to a local energy recovery facility where the waste is burnt generating energy and heat for local homes in the area. The bottom ash generated in this process is used as aggregate in road building – a truly closed loop process.

**7.2.5 BIODIVERSITY AND LANDSCAPING**

For reasons of aviation safety, deterring wildlife from the airfield is essential and requires both on and off site management.

Southampton Airport has a number of sustainable and approved measures in place to keep wildlife away from the airfield to maintain a safe operation for its passengers and users. These include landscape and habitat management to make the airport unattractive to wildlife, digital distress calls, bird scaring cartridges and the controlled use of lasers. The airport looks for innovative and non-invasive ways of managing birds including the use of drones.

Biodiversity and landscaping are particularly important issues for Southampton Airport because it borders the Itchen Valley Country Park; a Site of Special Scientific Interest (SSSI) and a Special Area of Conservation (SAC). Southampton Airport will produce a Habitat Management Plan if required, which takes into consideration Hampshire County Council, Eastleigh Borough Council and Southampton City Councils’ Local Biodiversity Action Plans.



Due to the proximity of the Itchen Valley Country Park Southampton Airport has agreed to voluntarily set aside an area of land to form a buffer zone between its operational area and the SSSI. The buffer zone is intended as a natural break area between Southampton Airport and the surrounding habitats, and contains an array of wild plants and insects that complement the adjoining SSSI habitat.

Southampton Airport works with its local councils and property owners to ensure that it undertakes careful and appropriate tree management. Tree management is essential to the safety of aircraft during take-off and landing and is a requirement under CAA legislation. However, the airport is conscious of the valuable services that trees provide to the local community and of ecosystems, and only undertakes essential activities for the safety of passengers and aircraft. Southampton Airport will continue to produce tree management plans and work with the local community to minimise any impact.

### 7.2.6 SAFEGUARDING AND ECOLOGY

Aerodrome safeguarding ensures the safety of aircraft when in the vicinity of an aerodrome by controlling potentially hazardous development and activity around it. There are three main types of aerodrome safeguarding; physical safeguarding which protects a set of flight safety surfaces up to a 30km radius around the airfield (this includes, buildings, cranes and trees), technical safeguarding which protects aircraft navigational equipment from any interference or disruption, and wildlife management which prevents any development areas from creating an environment attractive to birds.

As outlined in the joint Town and County Planning (Safeguarded Aerodromes, Technical Sites and Military Explosive Storage Areas) direction 2002, the aerodrome safeguarding control measures are included in UK legislation as a fundamental part of planning procedures. Safeguarded maps placed with planning authorities include a 30km radius centred on the aerodrome to indicate the area within which, developments that could have a detrimental effect on aircraft operations require consultation with the aerodrome. We are conscious that often our tree-related safeguarding works may be unpopular with local residents. We take our actions very seriously and in all cases work with

the respective council and, where required, the Forestry Commission to ensure that we meet all ecological expectations. We ensure that we have undertaken all the necessary ecological and habitat risk assessments. Managing ecology and wildlife is at the forefront of our minds and we work very closely with an independent team of ecologists to ensure that best practice is used and all mitigation and precautionary measures are taken.

### 7.2.7 GREEN CONSTRUCTION AND DESIGN

Green construction and design activities at airports present environmental challenges. Southampton Airport considers the environmental impact of any project that it undertakes throughout the development and delivery stage of projects.

This process is designed to mitigate the risk to the environment and identify specific project areas which would require further control measures to be implemented. These measures could include controls such as liaison with the Environment Agency for a land drainage consent for works liable to affect watercourses or through consultation with the local councils to ensure all sensitive receptors have been considered. Wherever possible the airport considers the following for projects or development:

- The use of recognised sustainable building design metrics such as BREEAM (Building Research Establishment's Environmental Assessment Method) where appropriate to the building type;
- The management and reduction of construction and operational waste through the airport Waste Management Strategy;
- A strategy to improve biodiversity on site where appropriate;
- The use of sustainable materials, procured locally where available;
- Efficient use of resources such as water and energy;
- Environmentally sensitive materials such as sustainable timber supplies, accredited by the Forest Stewardship Council (FSC), are used where practical to do so.



FIGURE 14: AERIAL VIEW OF STATION AND AIRPORT

New Rail Station Linking to Fareham/Portsmouth?

Free Shuttle Linking Rail Stations and Airport Terminal

Portsmouth - 20 minutes?

London - 66 minutes

Southampton Airport Parkway Rail Station

Southampton City - 8 minutes

### M3 & M27

Southampton Airport is at the junction of the M3 and M27 motorways

### 66 MINUTES

to London by fast train from Southampton Airport Parkway rail station

## 7.3 SURFACE ACCESS INITIATIVES

Southampton Airport is located in very close proximity to Southampton Airport Parkway rail station with direct links to major UK cities including London, Southampton, Winchester, Basingstoke, Reading, Bournemouth, Salisbury and Oxford.

Southampton Airport works with a number of key transport stakeholders to develop and implement its Surface Access Strategy (SAS). The current Surface Access Strategy 2017 - 2021 has been produced in conjunction with this draft Master Plan and full details can be found on the Southampton Airport website. The table opposite shows the growth in usage of public transport, especially train and bus, that the Surface Access Strategy is aiming to achieve in the next 20 years.

We will continue to increase the modal split towards public transport including supporting the local authority and Solent LEP aspirations for improved rail connections to the East of Southampton Airport. Rail links especially to Fareham and Portsmouth are poor and involve a connection. One such idea being investigated is a new rail station on the Botley line which could enable faster direct services to Portsmouth with the airport providing a shuttle link back to the Terminal and Southampton Airport Parkway station.

PUBLIC TRANSPORT	2016 ACTUAL	2018 ACTUAL	2021 TARGET	2026 TARGET	2031 TARGET	2037 TARGET
RAIL	17%	18%	19%	20%	21%	23%
BUS/COACH	7%	6%	8%	8%	9%	10%
<b>TOTAL</b>	<b>24%</b>	<b>24%</b>	<b>27%</b>	<b>28%</b>	<b>29%</b>	<b>33%</b>
OTHER TRANSPORT						
PRIVATE & HIRE CAR	52%	51%	49%	49%	47%	46%
TAXI	17%	20%	17%	16%	16%	15%
OTHER	7%	5%	7%	7%	7%	6%

FIGURE 15: SURFACE ACCESS MODAL SPLIT TARGETS



PROPOSED AIRPORT DEVELOPMENT  
ZONE BIRD'S EYE VIEW



“Southampton Airport’s vision to grow in a responsible and sustainable manner, and by doing so support in excess of 1,500 jobs and contribute £400million to the economy per year by 2037, is exciting for the whole region.

“Not only will the direct impact be beneficial for the Solent but also on the supply chain and job numbers. Crucially, this Vision for Sustainable Growth supports our aim of delivering bold changes by being increasingly attractive to businesses and customers from beyond our region.”

- Gary Jeffries, Solent Local Enterprise Partnership Chairman

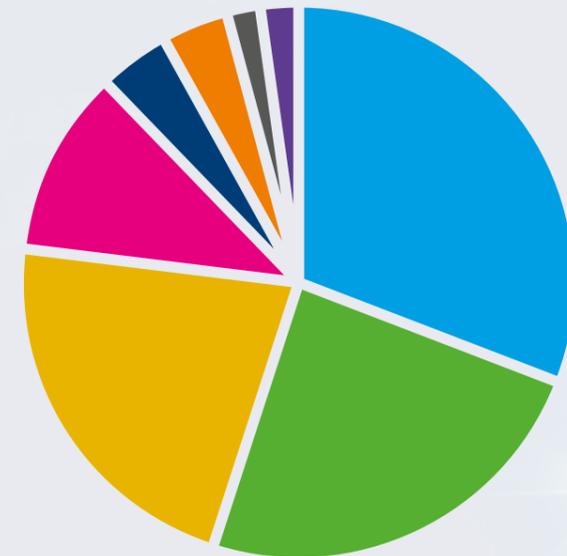
PROPOSED AIRPORT DEVELOPMENT  
ZONE STREETVIEW



# 8. Economic Impact

**FIGURE 17: EMPLOYMENT BY EMPLOYER CATEGORY AT THE SOUTHAMPTON AIRPORT CAMPUS**

Source: Southampton Airport



<span style="color: blue;">■</span> Air Support Services	31%
<span style="color: green;">■</span> Airlines	24%
<span style="color: yellow;">■</span> Southampton Airport	22%
<span style="color: magenta;">■</span> Retail & Catering	11%
<span style="color: darkblue;">■</span> Air Traffic Control	4%
<span style="color: orange;">■</span> Other	4%
<span style="color: grey;">■</span> Car Parking	2%
<span style="color: purple;">■</span> Car Hire	2%

## 8.1 INTRODUCTION

Air transport moves people and goods around the globe. The connectivity that air transport provides is a key factor in increasing regional and national economic productivity and prosperity. It is essential for many companies to function, and provides critical connections to domestic and overseas markets, facilitating the flow of trade, tourism, investment and knowledge.

Even a relatively small airport such as Southampton Airport can have a substantial economic impact since, in addition to its direct economic contribution, additional value is spread more widely through the economy. Businesses can access global supply chains, direct investment, new expertise and achieve economies of scale through expansion to serve a wider market.

Around 200 people are employed directly by Southampton Airport, with a further 750 jobs located on the airport campus, equating to just under 1000 jobs at the airport. Figure 17 illustrates the breakdown of these jobs by broad category.

In addition to benefits to business and other institutions such as universities, individuals experience significant benefits from air transport, since many rely on it for holidays and visiting friends and family as well as connecting people to new business opportunities and markets.

In order to better understand the transmission mechanisms through which improvements to airport connectivity can deliver local and regional economic impacts, it is helpful to understand more about the types of individual that use Southampton Airport and their rationale for doing so.

For example, those sectors which contribute most to national economic output employ a far greater proportion of managerial, technical and professional staff than average. In the four sectors identified by the Solent LEP as drivers of future economic growth (Marine and Maritime, Aerospace and Defence, Computer Science,

and Photonics) 62% of all employees work in managerial, technical and professional roles compared to 44% across the entire economy.

In turn, evidence from the National Travel Survey (NTS) and Civil Aviation Authority (CAA) highlights the different propensity of individuals by occupation and industrial sector to travel by air<sup>2</sup>. Broadly speaking, those in managerial, technical and professional roles are likely to use air services more frequently and to travel further when they do so, both for business and for leisure.

More than 80% of all Southampton Airport passengers work in managerial, professional and technical roles, and this suggests that we play an important role in facilitating the flow of trade, investment and knowledge and, in particular, for supporting those sectors which provide a disproportionate contribution to the national economy.

At 29%, the proportion of business travellers from Southampton Airport is high<sup>3</sup>. With the exception of London City Airport (where approximately half of all passengers are travelling for business), this is broadly in line with Heathrow Airport (28%) and higher than Birmingham (17%), Bristol (16%), and London Gatwick (14%) airports<sup>4</sup>.

Through facilitating business travel, Southampton Airport supports the growth of local and regional businesses by providing connections to export markets for goods and services, attracting inward investment, supporting economies of scale and deepening labour markets.

<sup>2</sup>Travel Survey, DfT (<https://www.gov.uk/government/statistics/national-travel-survey-2016>) and Departing Passenger Survey, CAA (<http://www.caa.co.uk/Data-and-analysis/UK-National-aviation-market/Consumer-research/Departing-passenger-survey/Survey-reports/>)

<sup>3</sup>This average across all passengers includes those who reported their occupation as "not working or retired", "homeworker" or "student"

<sup>4</sup>CAA Passenger Survey Report, 2015



## 8.2 ECONOMIC IMPACTS METHODOLOGY

### ECONOMIC IMPACT ANALYSIS

A standard methodology was deployed in assessing the economic impact of Southampton Airport, known as an economic impact assessment. This measures the four core channels through which economic impacts may be generated. These are:

- Direct impacts, which measure the level of economic activity on the Southampton Airport campus, including Southampton Airport itself plus a range of business partners and site tenants. The direct impacts of Southampton Airport are quantified in terms of its contribution to UK economic output (GVA) and the employment it supports
- Indirect impacts, which capture the quantity of economic activity supported in down-stream industries that supply and support the activities at Southampton Airport, as a result of expenditure on goods and services at the airport. The indirect impacts of Southampton Airport are quantified in terms of the additional contribution to UK economic output (GDP) generated through the supply chain from expenditure at the Southampton Airport site
- Induced impacts, which represent the wider economic activity that takes place when employees of Southampton Airport and its supply chain spend their earnings in a wide range of sectors in the general economy. The induced impacts of Southampton Airport are quantified in terms of the wider economic activity that takes place when employees of Southampton Airport and its supply chain spend their earnings
- Catalytic effects, which represent the potential wider economic benefits that are available to the region as a consequence of connectivity to overseas markets, suppliers and investors. Catalytic impacts capture the wider economic potential resulting from the contribution of airport transport to trade and tourism (the demand-side impact) and the long-run contribution of growth in air transport to productivity and GDP (the supply-side impact).

## 8.3 CURRENT ECONOMIC IMPACT

### DIRECT IMPACT

In addition to the earnings of the airport operator, the direct economic impact of Southampton Airport also includes the profits of all other businesses located at Southampton Airport and earned on-site, and the earnings of employees working on-site. We estimate that the total profits earned at Southampton Airport campus equate to more than £33m (2015 prices), with a total wage bill of £32m (2015 prices).

**FIGURE 18: DIRECT IMPACTS BY EMPLOYER CATEGORY AT THE SOUTHAMPTON AIRPORT CAMPUS**

Source: Steer Davies Gleave analysis



Southampton Airport	25%
Airlines	17%
Air Support Services	17%
Car Hire	15%
Retail & Catering	10%
Other	7%
Air Traffic Control	6%
Car Parking	3%

Using the methodology described, the direct annual economic impact of Southampton Airport is estimated to be in excess of £64m (2015 prices). This represents the total incomes received by providers of labour (staff) and capital (businesses) as a result of activity at Southampton Airport. Of this total, £16m is generated by the airport operator with the remaining £48 million coming from other businesses located on Southampton Airport's site. A full breakdown by employer category is provided in Figure 18.

## INDIRECT IMPACT

In order to produce goods and services at Southampton Airport, firms on the Southampton Airport campus purchase millions of pounds' worth of inputs. Southampton Airport sits at the centre of a complex supply chain network stretching well beyond the airport site, the study area and rest of the country. The study area is the area that is covered by Solent LEP and reflects the man catchment area of Southampton Airport. In total, it estimated that almost £64m (2015 prices) was spent on intermediate inputs by businesses operating at Southampton Airport (the indirect economic impact) of which £10m is attributable to the activity of Southampton Airport, and the remaining £54m due to activity undertaken by airport tenants and business partners. Of the total airport expenditure, 98% was in the UK and 32% was in the study area. The majority of Southampton Airport expenditure, was on construction and manufacturing activities which together accounted for over 50% of total spending.

## INDUCED IMPACT

The direct and indirect activity linked to Southampton Airport, supports more than £125m (2015 prices) of economic activity, and supports thousands of jobs.

The induced impact of Southampton Airport has been estimated as a simple multiplier applied to the sum of direct and indirect impacts. Induced impacts, therefore, are estimated to contribute a further £32m (2015 prices) to the current economic footprint of Southampton Airport. Since a majority of employees at Southampton Airport campus are resident within the study area (73%), a significant proportion of induced impacts will be experienced within the immediate vicinity of Southampton Airport.

<sup>5</sup>UK Attractiveness Survey 2017, Ernst and Young, 2017

## CATALYTIC IMPACT

- Catalytic Impacts capture the way in which an intervention stimulates the business of other sectors of the economy. Air transportation facilitates development of the wider economy through a number of mechanisms
- Trade – air transport provides connectivity to export markets for goods and services
- Productivity – air transportation offers access to new markets enabling businesses to achieve greater economies of scale. Air access also enables companies to attract and retain high quality employees
- Investment – proximity of an international airport is a key consideration when companies choose their site location
- Tourism – availability of air travel draws larger numbers of tourists to the area. The tourism spend supports a wide range of business sectors including hotels, restaurants, entertainment and recreation and car rentals.

## TRADE AND PRODUCTIVITY

Air transport connects businesses to a wide range of global markets, providing a significantly larger customer base for their products than would be accessible otherwise. It is particularly important for high-tech and knowledge-based sectors, and suppliers of time-sensitive goods.

Several industries rely on air transport to operate their 'just-in-time' production operations, providing greater flexibility within the supply chain and reducing costs by minimising the need to hold stocks of supplies.

Southampton and the wider Solent area surrounding Southampton Airport is home to businesses which are reliant upon strong air infrastructure. Effective international connectivity enables these companies to operate efficiently and productively to retain their international client and supplier base.

## INVESTMENT

International companies looking to locate in the UK will be drawn to areas with good access to air travel. Ernst and Young's UK Attractiveness Survey 2017<sup>5</sup> assesses how well the UK's regions are attracting Foreign Direct Investment (FDI). The report remarks upon the fact that the more geographically peripheral regions, such as Wales, North East and South West are seeing FDI growing far more slowly than regions based around the key UK cities of London, Birmingham, Manchester and Leeds.





## TOURISM

Southampton Airport's national and international air connectivity helps to attract tourists from the UK and the rest of the world. Southampton Airport is located near key tourist destinations such as the Isle of Wight, the New Forest, The South Downs, Southampton, Portsmouth, Winchester and Chichester. It is also a vital link for the growing UK cruise industry based at the Port of Southampton.

In 2016, of the 38 million trips to the UK by international visitors, the South West received 6.6% and the South East received 13.8%. Both regions experienced growth in international visitors between 2015 and 2016. Growth in the South West was 5.2% and in South East, growth was 1.4%<sup>6</sup>. On average, in 2016, each international visitor to the South West spent £536 and to the South East spent £424. This spend supports businesses in sectors including catering, hospitality, retail and recreation. The international connections provided by Southampton Airport will help to support the upward trend in tourism in the area and growing the business sectors which cater to visitors to the region.

## SUMMARY

Figure 19 summarises the contribution of direct, indirect and induced economic impacts to the total economic footprint of Southampton Airport, estimated to be £161m (2015 prices).

<sup>6</sup>Inbound Region Data, Visit Britain, 2017

**FIGURE 19: DIRECT, INDIRECT AND INDUCED IMPACTS OF SOUTHAMPTON AIRPORT, 2015**

Source: Steer Davies Gleave analysis  
Direct: £64.7 million  
Indirect: £63.9 million  
Induced: £32.2 million

**£160.8  
MILLION**

## 8.4 FUTURE PROJECTIONS

### FUTURE VISION

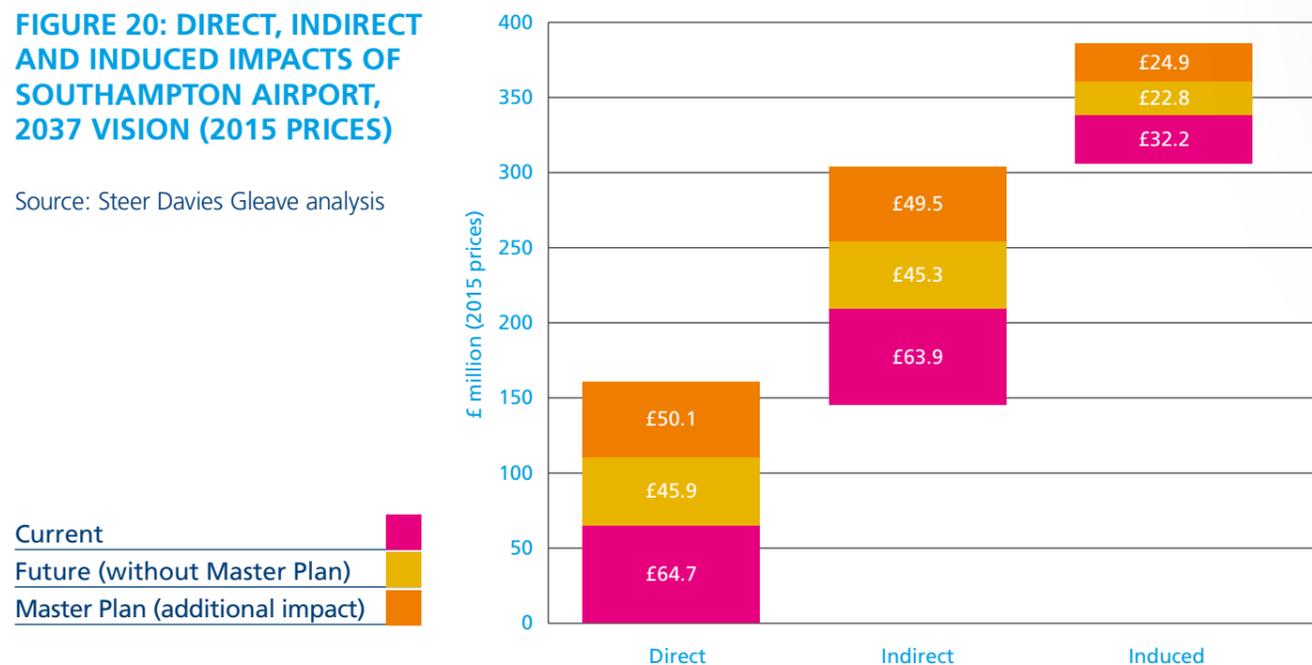
Figure 20 presents the same current projections, but includes incremental economic impacts to capture the effect of implementing the future vision, the Southampton Airport Master Plan. In this scenario, the direct contribution of businesses located at Southampton Airport is £161m (2015 prices). This higher level of output further increases Southampton Airport's requirements from its supply chains, including £159m through the supply chain and £80m in the wider economy. In total, the economic contribution of the airport in 2037 is £400m.

Figure 20 illustrates the future trajectory of Southampton Airport's future economic impact. The expansion of air services aligned to the Master Plan is assumed to commence in 2019, at which point the current business and Master Plan aligned impacts (future vision) diverge.

Without the Master Plan, Southampton Airport's contribution to the economy is assumed to grow in-line with trend passenger demand which is severely limited by the capacity and range of services on offer at the airport and the restricted range of destinations on offer. Delivering the Master Plan is critical to give Southampton Airport the capacity it needs to meet its growth potential and, over the next 20 years, support additional cumulative output of £1.8bn (2015 prices) to the local, regional and national economy.

**FIGURE 20: DIRECT, INDIRECT AND INDUCED IMPACTS OF SOUTHAMPTON AIRPORT, 2037 VISION (2015 PRICES)**

Source: Steer Davies Gleave analysis



**“Hampshire Chamber of Commerce welcomes and supports Southampton Airport’s plans for growth. The economic, employment and business benefits to the region, through sensitive expansion, will make an important contribution to development of the Solent and wider business community.**

**“The opportunities for high tech, knowledge, innovation and service sector businesses – so important to this region – will be invaluable, since these sectors are increasingly trading in global markets, requiring rapid access to clients, partners and markets.**

**“The airport’s plans for a multi-modal transport hub, clear commitment to noise abatement and support of clean growth strategies are all to be welcomed.”**

- Ross McNally, Chamber of Commerce



## CATALYTIC IMPACT

The catalytic impact of Southampton Airport is presented separately to the core impacts because, whereas direct, indirect and induced impacts are measures of Southampton Airport's impact, catalytic impacts measure the wider economic potential of the airport to support the local, regional and national economy.

As part of the assessment of catalytic impacts the Air Connectivity Index (ACI) has been calculated which represents the economic opportunities available from Southampton Airport. This measures the access available from Southampton Airport to the global air transport network. It is a qualitative measure of air transport services, from the point of view of its businesses. The higher the level of connectivity the greater the level of access to the global economy.

Between 2015 and 2037, based on current business and without the development outlined in A Vision For Sustainable Growth, the Accessibility Index increases by 27%. This increase is a function of the number of countries accessible from Southampton Airport which, in the current business scenario is limited by the flying range of aircraft flying to/from Southampton. The incremental impact of additional seats on existing routes is significantly smaller than providing that same number of additional seats to another country not currently served. Delivering A Vision For Sustainable Growth, by contrast, the Accessibility Index substantially increases by 75% which is largely driven by providing access to new destinations.

Currently, a small number of countries account for a large percentage of the Accessibility Index, in particular UK and France. The delivery of A Vision For Sustainable Growth will make more destinations accessible from Southampton Airport.

The redistribution of flights among destinations will mean the Accessibility Index is spread between a greater number of countries. Although a small number of countries will still dominate the index, the proportion is lower and some countries, such as Italy and Spain, will significantly increase their reach. This will improve the flow of trade, tourism, investment and knowledge from these countries.

## 8.5 CONCLUSION

Southampton Airport currently contributes more than £160m (2015 prices) to the UK economy through activity at Southampton Airport, its supply chain, and in the wider consumer market. A significant proportion of these benefits are enjoyed by households and business located within the Solent Local Enterprise Area.

By 2037, without the development outlined in A Vision For Sustainable Growth, Southampton Airport could increase its contribution to £275m (2015 prices) through a programme of incremental improvements to Southampton Airport which will accommodate modest passenger growth over a marginally increased number of regional routes within Europe.

Alternatively, A Vision For Sustainable Growth provides the opportunity for Southampton Airport to significantly boost its contribution to the local, regional and national economy. The expansion of existing carriers and/or securing an additional major airline would support flights to more destinations and therefore accrue larger economic benefits for the region. At the local level, expansion of the resident aircraft fleet would deliver an economic boost through providing more locally-based direct jobs through the servicing of the resident aircraft fleet, and the processing of passengers using the extended flight network.

Delivering A Vision For Sustainable Growth could increase the annual economic contribution of Southampton Airport to £400m by 2037 (2015 prices). On a cumulative basis, therefore, it can be expected to deliver over £1.8 billion to the economy in the twenty years to 2037.

# 9. Our Commitments and Next Steps

The draft Master Plan was published for consultation in the autumn of 2018.

We received nearly 400 individual responses, with 62 per cent firmly supportive and 38 per cent voicing concerns about noise, air and environment, which we have listened to and are managing sensitively with maximum consideration to sustainability.

We held four public consultation open evenings which were attended by close to 400 people. We will be holding more public information events during the planning application process which will be widely advertised.

Documents are available to download from the Southampton Airport website.

Details of further consultation events will be made available at:  
[www.southamptonairport.com/masterplan](http://www.southamptonairport.com/masterplan)

Feedback can be emailed or sent to:

[consultation@southamptonairport.com](mailto:consultation@southamptonairport.com)

Southampton Airport Master Plan consultation  
 Southampton Airport  
 Hampshire  
 SO18 2NL

## Main points of feedback by theme:



## Draft Master Plan

### Consultation Response



### Noise

We are currently undertaking a full review of our Noise Insulation Policy and will work with our Technical Working Group to ensure that it meets the needs of the community. We have further developed our response to noise monitoring and have extended our program to deploy monitors much further afield than we have ever before.

### Environment:

We have developed a robust air quality monitoring strategy to inform our communities and stakeholders as well as inform our future growth plans. Monitoring programmes will produce valuable data and insight into our environmental impact which will be shared with our stakeholders including our local community.

### Community:

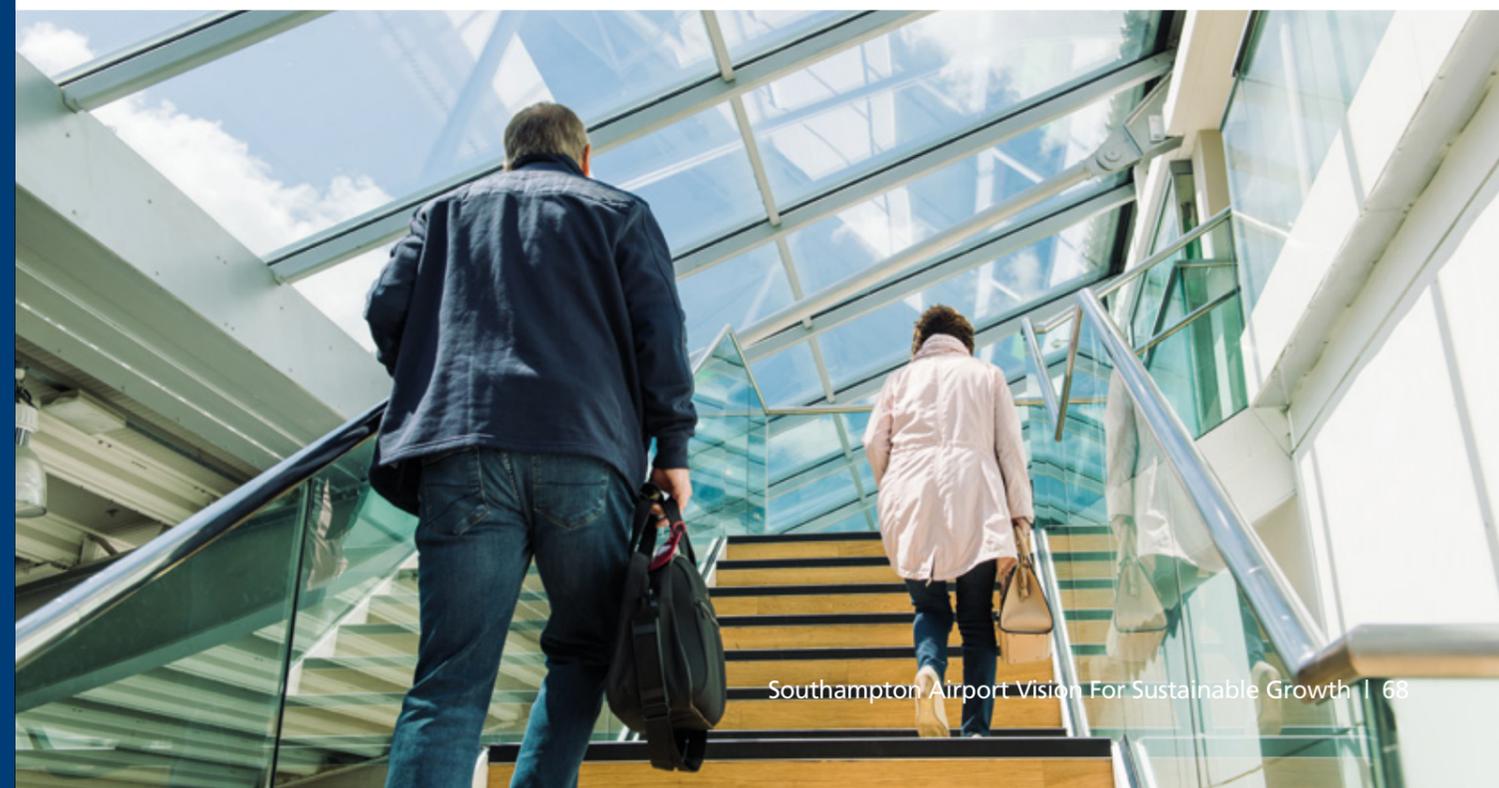
Our award winning Corporate Social Responsibility strategy seeks to include and work with the communities in which we operate. We will continue to work with a diverse section of our community to support their interests and needs, and achieve a sustainable future.

### Transport & roads:

We are committed to working with local authorities to reduce road congestion and push for improvements in rail and public transport links.

### Route requests:

We received a lot of feedback including requests for new routes – Spain and Cyprus proving most popular. Whilst this doesn't form part of the formal consultation itself, we are listening and always discussing new routes with airlines.



# 10. Glossary of Terms

The following glossary explains the airport specific terminology contained within this document:

**AERODROME:** Any area of land or water designed equipped, set apart or commonly used for affording facilities for the landing and departure of aircraft.

**AIR TRANSPORT MOVEMENT:** Landing or take offs of aircraft engaged in the transport of passengers. All scheduled movements including those operated empty, loaded, charter and air taxi are included.

**AIRCRAFT MOVEMENT:** An aircraft taking off or landing at an airport.

**AIRCRAFT STAND:** A designated area on an aerodrome intended to be used for parking an aircraft.

**AIRSIDE:** Part of the airport inside the posted security boundary, to which entry by members of the public is restricted.

**APRON AREA:** The area where aircraft are parked, allowing for the embarkation and disembarkation of passengers or the loading and unloading of cargo and including any associated aircraft stand taxiways.

**CHAPTER 2/3 AIRCRAFT:** Much of the International Civil Aviation Organisations (ICAO) work over the past 40 years has been aimed at reducing aircraft noise at source. Aircraft and helicopters built today are required to meet the noise certifications standards adopted by the council of ICAO. These are contained in annex 16 – Environmental Protection. The initial standards for jet aircraft were included in chapter 2 of annex 6. Subsequently newer aircraft were required to meet stricter standards contained in Chapter 3.

**CHAPTER 4 AIRCRAFT:** Chapter 4 is a stricter standard for aircraft noise than Chapter 3, and was adopted by ICAO in 2001.

**LANDSIDE:** Area of the airport which is not airside, encompassing passenger facilities.

**STAKEHOLDER:** Any individual or member of a group with interest in the activities of Southampton Airport and on whom the airport's operation will have an impact, for example; government, airlines, staff, local community and passengers.

**SURFACE ACCESS:** The means by which the airport can be reached, for example road or rail.

**TAXI (VERB):** Movement of an aircraft from stand to runway, or runway to stand.

**TAXIWAY:** A defined path on an aerodrome established for the taxiing of aircraft and intended to provide link between one part of the aerodrome and another.

# 11. Abbreviations

A320	Airbus 320
ACI	airports Council International
AI	Accessibility Index
AOA	airport Operations Association
APF	Aviation Policy Framework
ASAS	airport Surface Access Strategy
ATM	Air Transport Movement
B737	Boeing 737
BREEAM	Building Research Establishments' Environmental Assessment Method
CAA	Civil Aviation Authority
CAGR	Compound Annual Growth Rate
CAP 168	Civil Aviation Publication 168
CTA	Common Travel Area
DB	Decibel
DfT	Department for Transport
DPA	Disability Discrimination Act
EASA	European Aviation Safety Agency
EBC	Eastleigh Borough Council
EV	Electric Vehicle
FAA	Federal Aviation Administration
FAR	Federal Aviation Regulation
FBO	Fixed Base Operation
FDI	Foreign Direct Investment
GPD	Gross Domestic Product

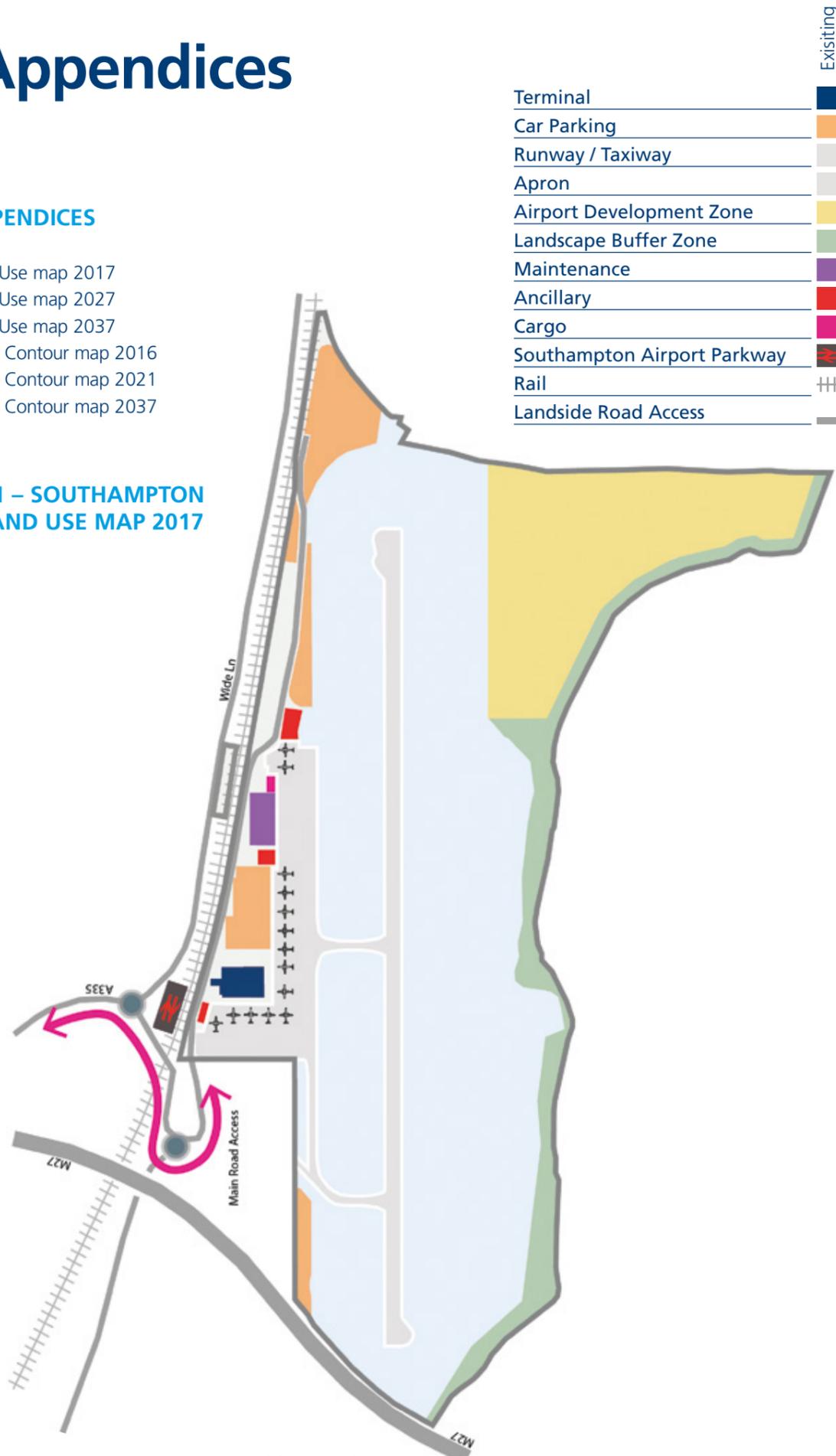
GPDO	General Permitted Development Order
GVA	Gross Value Added
ICAO	International Civil Aviation Organization
ILS	Instrument Landing System
LAEQ	Equivalent Continuous Level of Noise
MPV	Multi-Purpose Vehicle
MSCP	Multi Storey Car Park
NATS	National Air Traffic Services
NO2	Nitrogen Dioxide
NSIP	Nationally Significant Infrastructure Project
NTS	National Travel Survey
OEF	Oxford Economic Forecasting
PM10	Particulate Matter up to 10 Micrometres in size
PRM	Passenger with Reduced Mobility
PSZ	Public Safety Zone
RDA	Regional Development Agency
SERAS	South East and East of England Regional Air Study
SIC	Standard Industrial Classification
Solent LEP	Solent Local Enterprise Partnership
SSSI	Site of Special Scientific Interest

# 12. Appendices

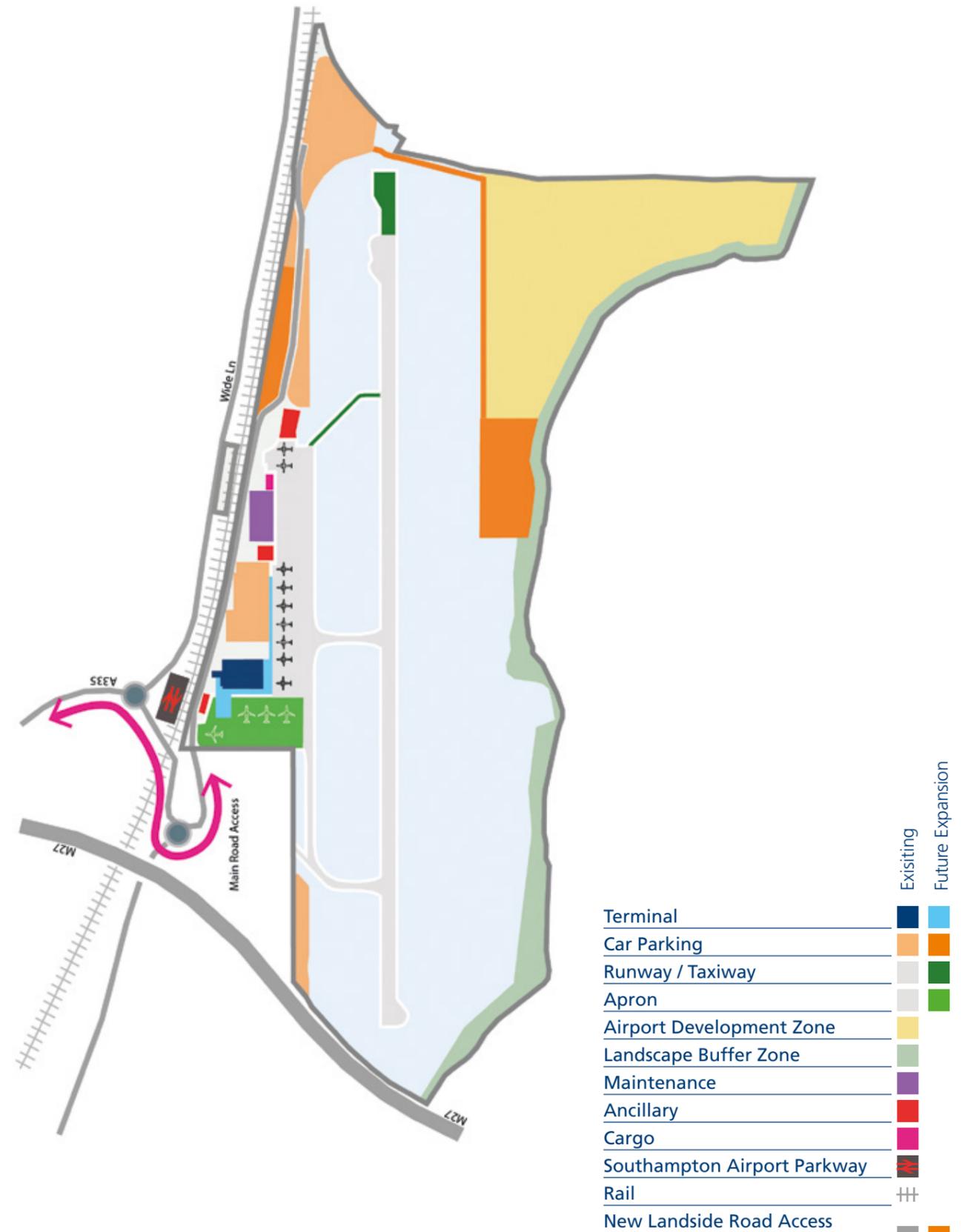
## LIST OF APPENDICES

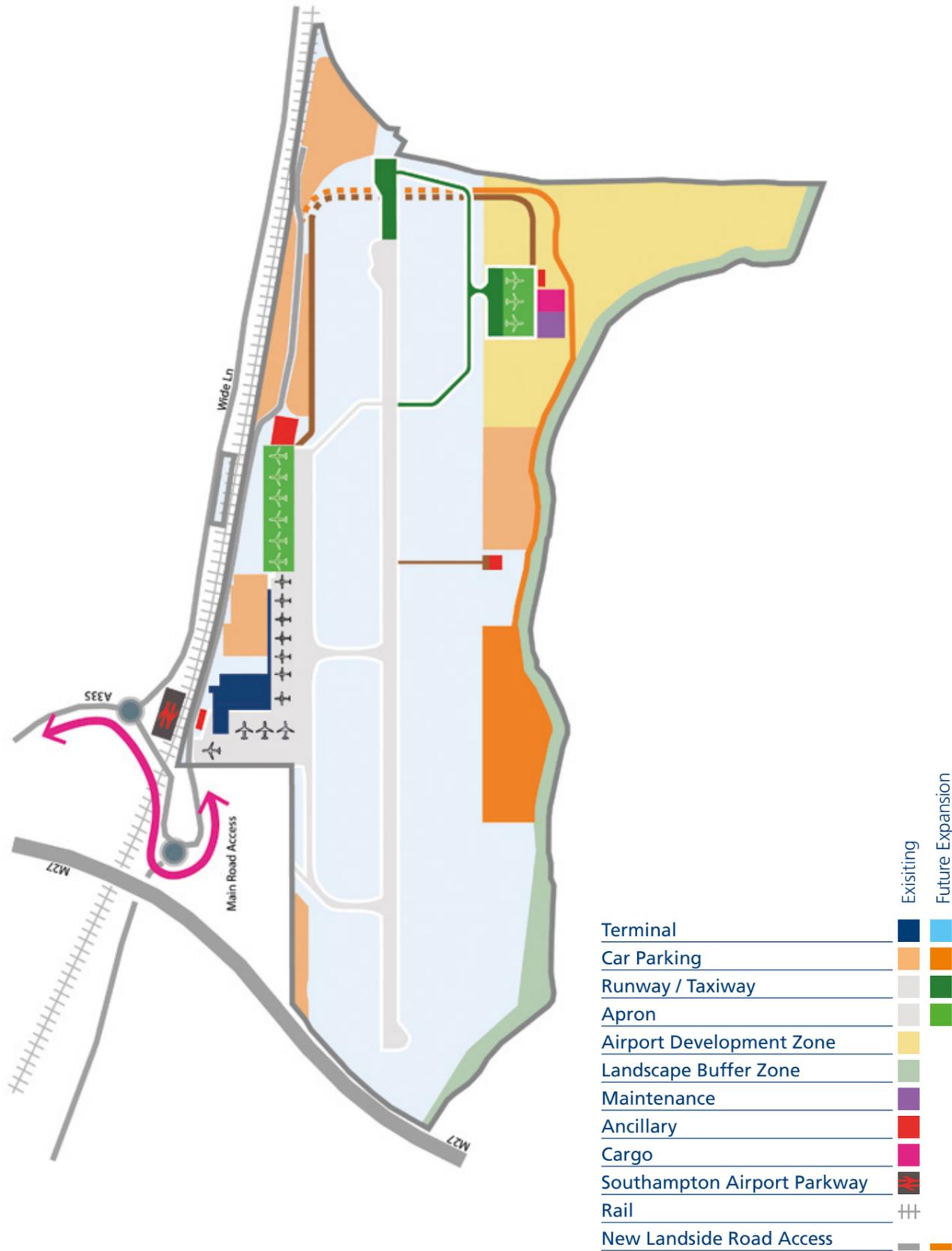
1. Land Use map 2017
2. Land Use map 2027
3. Land Use map 2037
4. Noise Contour map 2016
5. Noise Contour map 2021
6. Noise Contour map 2037

### APPENDIX 1 – SOUTHAMPTON AIRPORT LAND USE MAP 2017

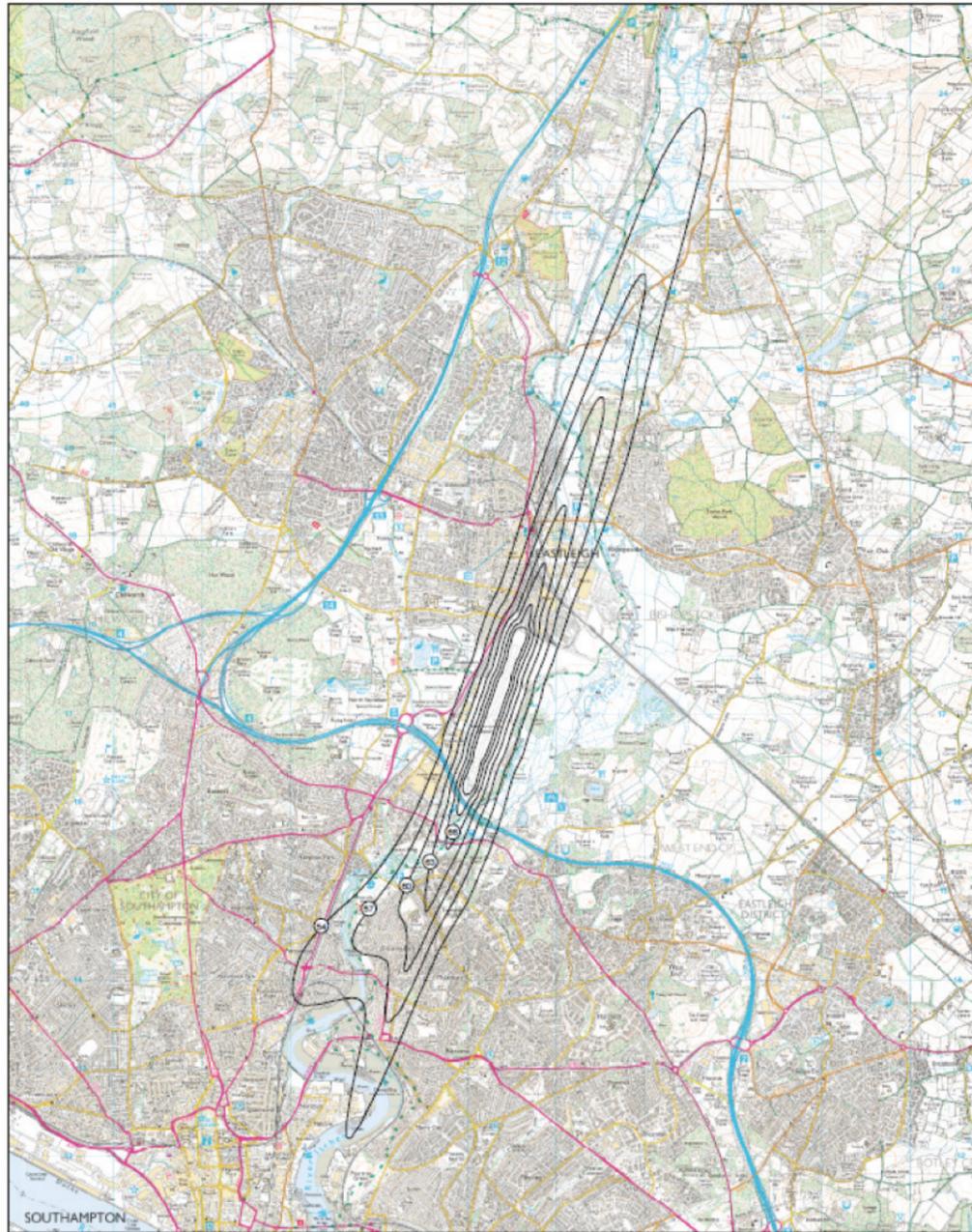


### APPENDIX 2 – SOUTHAMPTON AIRPORT LAND USE MAP 2027





APPENDIX 5 – NOISE CONTOUR MAP 2021



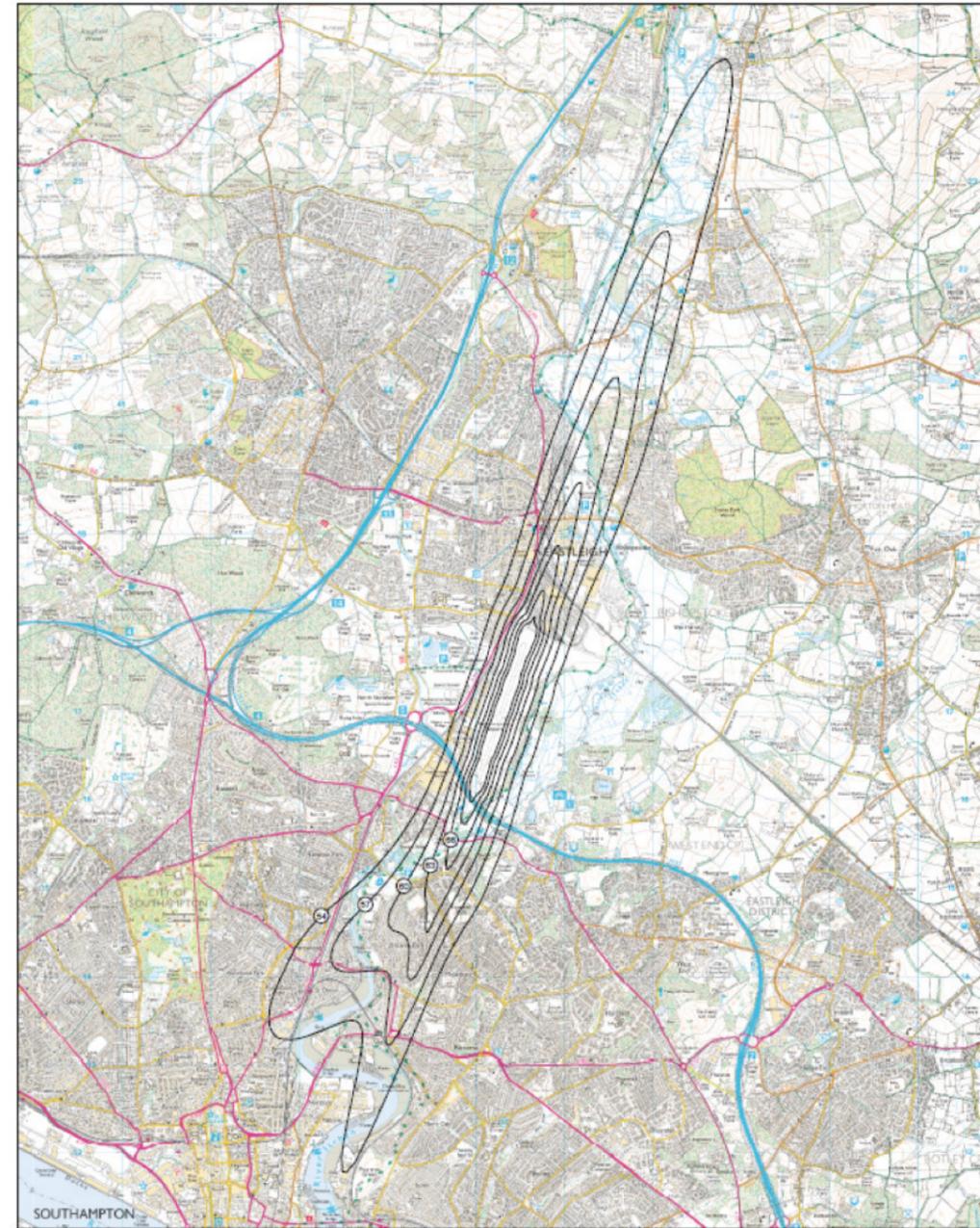
0 1 2 3 km

**SOUTHAMPTON AIRPORT**  
2021 average summer day  $L_{Aeq,15hr}$  54-72 dB(A) contours - with RWY 20 starter extension  
Modal split 64% RWY 20 / 36% RWY 02

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APPENDIX 6 – NOISE CONTOUR MAP 2037



0 1 2 3 km

**SOUTHAMPTON AIRPORT**  
2037 average summer day  $L_{Aeq,15hr}$  54-72 dB(A) contours - with RWY 20 starter extension  
Modal split 64% RWY 20 / 36% RWY 02

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