



# Overview of Regional Airports – Maximising the Benefits for Birmingham



**A report from Overview & Scrutiny**







## Foreword

By Cllr Timothy Huxtable

Chairman, Regeneration O&S Committee

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In many recent debates at City Council meetings, the important role of transport infrastructure in increasing economic growth, job and wealth creation and investment in Birmingham (and the wider region) has been discussed in great detail. Included in this debate is the importance of Birmingham as a global city and the need for excellent international links.

To fulfil the City Council's intention of becoming a truly "global city with a local heart", Birmingham requires world class national and international gateways – Birmingham International Airport being one such gateway.

The proposed extension of the runway at Birmingham International Airport will bring many challenges but at the same time should create many opportunities and it is the identification of these opportunities and how they can be maximised for the benefit of Birmingham and its citizens that this report seeks to grasp.

These opportunities includes the "economic multiplier" effect to the local economy of encouraging companies and organisations to locate events at the NEC or ICC; the tourists we can attract with the city and region's varied attractions; and the inward investment that can be secured as a result of quick and easy links to other major business centres.

This Overview looks at maximising the benefits for Birmingham of Birmingham International Airport, and in particular Birmingham International Airport and its proposed runway extension. For Birmingham (and the wider region) to capitalise on growth in the global economy and to bring jobs and investment to our city, Birmingham International Airport needs to have a runway capable of making direct connexions to these global growth areas.

However, a runway on its own will not attract investment. To bring these benefits about, the City Council must play its part, working with the airport company and other partners. The committee's recommendations will contribute to these objectives.

It is important that we get this right now – whilst the global economic downturn may have an impact in the short term, Birmingham needs to be ready for when economic conditions improve.

Finally, I would like to personally thank Members of the Regeneration O&S Committee and officers for all their support, hard work and commitment in writing this report.

*Timothy Huxtable*



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## Overview of Regional Airports – Maximising the Benefits for Birmingham

Further information regarding this report can be obtained from:

Lead Review Officer: Emma Williamson  
tel: 0121 464 6870  
e-mail: [emma\\_williamson@birmingham.gov.uk](mailto:emma_williamson@birmingham.gov.uk)

Reports that have been submitted to Council can be downloaded from [www.birmingham.gov.uk/scrutiny](http://www.birmingham.gov.uk/scrutiny).



# 1 Introduction

## Background

- 1.1 Members of the Regeneration O&S Committee agreed at the June 2008 Committee meeting to undertake an Overview exploring how Birmingham City Council was responding to the opportunities and challenges presented by local regional airports.
- 1.2 The reason for undertaking this work at this time is that the City Council had declared its support for the runway expansion at Birmingham International Airport, and we were keen to ensure that the city was in a position to benefit fully from the expansion.
- 1.3 This Overview was not intended to re-open the debate on the expansion itself, nor to debate the climate change issues surrounding airport expansion, but to examine how Birmingham City Council with partners can work to ensure that Birmingham residents benefit fully from the current airport and the proposed expansion.

## Terms of Reference

- 1.4 The aim of the Overview was therefore to answer the key question:

**How is the City Council working with partners to maximise the benefits promised by Birmingham International Airport and what role do local airports play in the local economies?**
- 1.5 The key lines of enquiry were to:
  - Investigate the airports contribution to Birmingham economy as employers and how Birmingham residents can further benefit;
  - Investigate the airports contribution to Birmingham economy in attracting and retaining economic investment and how this can be maximised;
  - Investigate the airports role regarding the visitors economy in Birmingham and cultural links; and
  - Investigate other benefits that may accrue.

## Methodology

- 1.6 Our evidence gathering took place at four committee meetings between October 2008 and January 2009 (one of these being a joint meeting with Co-ordinating O&S Committee) with the first meeting held at Birmingham Airport in September.



## 2 Regional Airports

### The Role of Regional Airports

- 2.1 Government policy with regard to regional airports was set out in the White Paper *The Future of Air Transport*, published in December 2003. This set out a “strategic framework for the development of airport capacity in the United Kingdom over the next 30 years”. It included support for the growth of regional airports, in recognition of “the importance of air travel to our national and regional economic prosperity”.<sup>1</sup>
- 2.2 The Secretary of State for Transport reiterated that view in the House of Commons in July 2008:
- Regional airports generate regional growth, jobs and investment, and we support their development provided that environmental considerations are addressed.<sup>2</sup>
- 2.3 Specifically, according to the White Paper, regional airports:
- Support economic development in Scotland, Wales, Northern Ireland and the English regions;
  - Provide passengers with greater choice;
  - Reduce pressures on more over-crowded airports in the South East;
  - Reduce the need for long-distance travel to and from airports.
- 2.4 Regional airports have seen significant growth in passenger numbers since 1997 (see Table 2 on page 10). A report from the Civil Aviation Authority in November 2007, *Air Services at Regional Airports*, noted that:
- Improving visibility of regions and their airports has attracted more services (both leisure and business);
  - There has been a change in travel patterns as passengers to and from points outside London are using regional airports rather than travelling to London;
  - There has been some slowdown in growth, noticeably on domestic routes, in the last year or two, although it is too early to tell whether this will continue;
  - There is growing competition between regional airports resulting in some reduction in airport charges and competition between airlines remains fierce;
  - The challenge for regional airports appears to be for them to continue expanding while maintaining their attractiveness to the passenger in terms of convenience and speed;
  - There is a much greater focus on environmental issues;

<sup>1</sup> Department for Transport *The Future of Air Transport* 16 December 2003

<sup>2</sup> <http://www.publications.parliament.uk/pa/cm200708/cmhansrd/cm080708/debtext/80708-0002.htm>



- Long-haul services are generally perceived as high on the “wish” list of regions seeking greater international, particularly business links.<sup>3</sup>

2.5 With regard to the West Midlands, there are three licensed passenger airports in the region: one principal airport – Birmingham International Airport (BIA) – and two smaller airports – Coventry and Wolverhampton Airport (formally known as Halfpenny Green Airport).

### **Birmingham International Airport (BIA)**

2.6 Birmingham International Airport is located in the Metropolitan Borough of Solihull, adjacent to the National Exhibition Centre (NEC) and eight miles south east of Birmingham’s city centre. The airport was opened in 1939 but its role as a modern international airport began in 1984 when new passenger terminal facilities were opened.<sup>4</sup>

2.7 Birmingham City Council is a stakeholder in the airport owning 49% of shares with the other six Metropolitan Borough Councils in the West Midlands.<sup>5</sup> The other stakeholders are the Ontario Teachers’ Pension Plan and Australia’s Victorian Funds Management Corporation (48.25%) and the Employee Share Trust (2.75%).

2.8 Evidence presented to this Committee included key statistics for Birmingham Airport for 2008:

- Passengers: 9.6 million;
- Cargo: 12,214 tonnes;
- Number of Airlines: 50 (Scheduled Airlines 28; Charter Airlines 22);
- Number of Destinations: 152 (Scheduled Destinations 100, Charter Destinations 70).

2.9 Table 1 on page 9 sets out the major UK airports in terms of passenger numbers and air transport movements, showing that BIA is the sixth busiest in the country, behind four of the London airports and Manchester. Table 2 shows the top ten airports and their growth over the last ten years: Birmingham grew by 45% in that period.

2.10 A planning application was submitted, by the Airport Company, to Solihull MBC on 4 January 2009 and first considered by Solihull MBC’s Planning Sub-Committee on 15 December 2009. This sought consent for the extension of the main runway by 405 metres (from 2599 metres to 3004 metres) and for associated infrastructure, including the realignment of a section of the Coventry Road and a new air traffic control tower.

2.11 It is estimated this will cost £120 million with the extension possibly being operational by 2012. This extension will enable aircraft to operate with the range and payload necessary for direct long-haul services to the developing economies of South America, South Africa, Southern India, China, the Far East, and also to West Coast USA.

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<sup>3</sup> Civil Aviation Authority: Air Services at UK Regional Airports, An Update on Developments November 2007

<sup>4</sup> Birmingham International Airport *Towards 2030* Airport Master Plan, 2007

<sup>5</sup> Birmingham, Coventry, Dudley, Sandwell, Solihull, Wolverhampton and Walsall



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- 2.12 Birmingham International Airport's Master Plan: *Towards 2030 – Planning a Sustainable Future of Air Transport in the Midlands*, states:

The growing demand for a wider range of directly served destinations and routes, to support the regional and local economy, means that without an extension, the current length of the Main Runway would be an increasing constraint.

- 2.13 Solihull's Planning Committee on 22 April granted outline consent following agreement to a Section 106 condition imposed at the previous meeting on 31 March. The conditions of the permission include limits on night flights, noise control and improved public transport links. There will also be an annual tree planting scheme (costing £10,000 a year) to contribute to off-setting carbon emissions and a separate Carbon Management Plan with regular reviews. In May 2009, the Secretary of State decided not to call in the decision, which leaves a Section 106 agreement to be finalised for planning permission to be given.

## Coventry

- 2.14 Coventry Airport is situated three miles south east of the City of Coventry and was opened by the City Council in 1936. It is home to eight flying clubs and training schools plus Atlantic Airlines and Air Atlantique Classic Flights. Coventry Airport had applied for a two million per annum passenger terminal but was refused.<sup>6</sup> It has an important freight role with a 24 hour operation. Coventry Airport currently has no scheduled passenger flights.

## Wolverhampton

- 2.15 Wolverhampton Airport is seven miles to the south west of Wolverhampton and 20 miles from Birmingham. Originally built as an aerodrome for the Royal Air Force in 1939, the airport now provides a base for a number of general aviation operators and maintenance providers including: aircraft and helicopter flying schools, police helicopter unit and several private aircraft operators, along with various non-aviation based tenants also located on site.<sup>7</sup>

## Summary

- 2.16 Given the difference in scale between Birmingham International Airport and Coventry and Wolverhampton airports, our investigation has focused on the former, and therefore the remainder of this report will look at the benefits to Birmingham in relation to BIA.

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<sup>6</sup> [http://www.coventryairport.co.uk/news/2009/01/29/coventry\\_airport\\_plans\\_new\\_fbo](http://www.coventryairport.co.uk/news/2009/01/29/coventry_airport_plans_new_fbo)

<sup>7</sup> <http://www.wolverhamptonairport.co.uk/>



**Table 1: Total passengers and air transport movements for UK airports with over 1 million passengers (2008)<sup>8</sup>**

<b>Airport</b>	<b>Total Passengers in 2008*</b>	<b>Air Transport Movements in 2008**</b>
<b>Heathrow</b>	66,906,954	474,180
<b>Gatwick</b>	34,162,014	257,834
<b>Stansted</b>	22,340,375	178,997
<b>Manchester</b>	21,062,949	191,342
<b>Luton</b>	10,173,902	89,935
<b>Birmingham</b>	9,576,700	103,449
<b>Edinburgh</b>	8,992,178	118,899
<b>Glasgow</b>	8,135,260	90,977
<b>Bristol</b>	6,228,656	60,201
<b>East Midlands (Nottingham, Leicester, Derby)</b>	5,616,278	67,062
<b>Liverpool</b>	5,329,826	44,614
<b>Belfast International</b>	5,222,839	55,000
<b>Newcastle</b>	5,016,640	55,233
<b>Aberdeen</b>	3,290,236	106,366
<b>London City</b>	3,260,225	90,266
<b>Leeds Bradford</b>	2,860,447	38,150
<b>Belfast City (George Best)</b>	2,570,741	41,104
<b>Prestwick</b>	2,414,019	20,427
<b>Cardiff Wales</b>	1,978,719	23,559
<b>Southampton</b>	1,945,767	44,916
<b>Bournemouth</b>	1,078,941	11,936

\*Total passenger figures – excludes Channel Isles

\*\*Air transport movements are landings or take-offs of aircraft engaged in the transport of passengers, cargo or mail on commercial terms

<sup>8</sup> Civil Aviation Authority's Annual Airport Statistics for 2008



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Table 2: Top 10 UK Airports 2007 (passengers in millions)

	2008	1998	% growth 2008/1998
Heathrow	66.9	60.4	11%
Gatwick	34.2	29	18%
Stansted	22.3	6.8	227%
Manchester	21.1	17.2	22%
Luton	10.1	4.1	146%
<b>Birmingham</b>	<b>9.6</b>	<b>6.6</b>	<b>45%</b>
Edinburgh	9.0	4.5	98%
Glasgow	8.1	6.5	26%
Bristol	6.2	1.8	243%
East Midlands	5.6	2.1	163%

## 3 Potential Benefits for Birmingham

3.1 Throughout our evidence gathering, the importance of Birmingham International Airport and the runway extension to Birmingham's economy was emphasised, and a number of regional and local strategic documents were cited to support this:

- The 2003 *Future of Air Transport* White Paper endorsed the need for additional runway capacity in the Midlands (particularly as a new airport was not thought to be economically justified);
- The *Eddington Transport Study* (2006) set out the 'seven micro drivers' of how transport impacts on the economy and confirmed the continuing high benefit to cost ratios generated by airports and in particular regional airports;
- The *West Midlands Regional Economic Strategy* states that the "delivery of the Vision in this Strategy requires an international airport supporting the regional economy and its businesses";
- Birmingham International 3 runway extension and improved transport links on the ground to the airport is one of the nine priorities set out in the *West Midlands Regional Transport Priorities Action Plan* launched by the Regional Minister for the West Midlands on 15<sup>th</sup> December 2008;
- The *Birmingham Plan* (Unitary Development Plan 2005) states Birmingham International Airport is a major asset to both the city and the region, and that "sustained and balanced growth of Birmingham International Airport" should be encouraged to support an increased range of direct long and short-haul services;



- The *Birmingham Prospectus* cites the expansion of Birmingham International Airport as vital to improving the city's connectivity;
- The Community Strategy: *Birmingham Vision 2026* (which sets out the vision for the future of the city) states that "... the expansion of Birmingham International Airport [is] critical to the city and wider region's economic link to markets and key factors in attracting inward investment and employment";
- The *Local Area Agreement* states that "the expansion of Birmingham International Airport [is] critical to the city and wider region's economic link to markets and a key factor in attracting inward investment and employment";
- Under the *Council Plan 2008 – 2013* (the plan setting out the Council's high level statement of intent), one of the Priority actions is to "deliver key transport projects including ... the Birmingham International Airport runway extension".

3.2 These documents contain many statements as to the benefits that do and will flow from the airport and the expansion. The following sections of this report examine these benefits in more detail, alongside the cultural and social benefits brought to the city.

## 4 Economic Benefits – Employment

4.1 Our first line of enquiry was to examine the employment benefits provided by the airport. Firstly there is the fact that the airport company itself is a large employer – the Annual Report 2006/07 reported that an average of 675 people were employed over the year. It was not possible for the airport to identify how many of these are Birmingham residents. Using postcode analysis, it can be seen that 70% live in a 'B' code address – however the 'B' code includes areas such as Solihull and Sandwell. Further analysis shows that 24% of staff live within 3 miles of the airport and 46% of staff live within 5 miles.<sup>9</sup>

4.2 Birmingham Airport did not report any difficulty with recruitment, stating that staff turnover was between 6 and 8%, and that many employees had worked here for over 20 years. We also spoke to representatives of BMI, who reported that they recruited locally and the turnover of staff was low as staff were happy to work and live in the area.

4.3 Recognising its importance as a major employment site, the airport company has developed a Site Employment Strategy to ensure that local communities have access to jobs and employment at the airport. The Strategy recognises the need to work alongside key partners such as the Learning and Skills Council, the NEC, Pertemps and Solihull College. Two key features of the Strategy are the on-site JobCentre Plus office handling airport specific jobs and vacancies; and 'Job Junction', coordinating candidate referencing, criminal records checks and training for airport jobs and vacancies.

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<sup>9</sup> Briefing Note from Birmingham International Airport – Evidence File available in Scrutiny library



## Overview of Regional Airports – Maximising the Benefits for Birmingham

- 4.4 In addition, the airport company and other airport employers hold jobs fairs to highlight the job opportunities available. The airport company also promotes participation in on-site skills development programmes.
- 4.5 Secondly, there are the indirect employment benefits. The Airport Master Plan reports that “taking account of additional indirect and induced impacts, in 2006, it is estimated that the airport supported around 10,490 full time equivalent jobs (or 11,620 job opportunities) and generated £272 million of income in the West Midlands”.<sup>10</sup>
- 4.6 Looking forward to the airport extension, there have been a number of assessments of the extent to which this would further increase employment opportunities. The Master Plan sets out forecasts for employment opportunities and income generation if proposals in the BIA Master Plan are realised, including runway extension (Table 3).

**Table 3: Forecasts (BIA Master Plan)**

Year	Job Opportunities	Full Time Equivalent Jobs	Income £million*
2006	11620	10490	272
2011	16660	15050	477
2021	19340	17460	623
2030	21140	19090	8024

\* At 2006 prices

- 4.7 Two further studies have been undertaken in relation to the impact of BIA and the expansion. The York Aviation and Ecotec studies were undertaken using different scenario approaches, and based on different objectives:
- The study by York Consulting assessed the economic impact of BIA in relation to the development of other airports in and/or outside the Midlands region.
  - Ecotec’s study was undertaken in relation to the strategic assets within the M42 corridor. Four scenarios were assessed, one of which examined the impact of the extension of the runway.
- 4.8 Because of the different methodologies and objectives of the York Consulting and Ecotec studies, the findings are, in principle, not directly comparable. However, estimates were provided and are set out in Table 4.

<sup>10</sup> Birmingham International Airport *Towards 2030 Airport Master Plan*, 2007



**Table 4: Employment and Income Estimates (York Consulting and Ecotec)<sup>11</sup>**

	<b>BIA related employment and income In 2006 (£millions)</b>	<b>Employment based on main runway extension</b>	<b>Output (£millions)</b>
<b>York Consulting (2007)</b>	10,490 / £272	19,090	824
<b>Ecotec</b>	N/a	20,560	1,587.1

Source: York Consulting 2007, Ecotec

### **How Can Birmingham City Council Help Maximise These Benefits?**

- 4.9 In our discussions with representatives from the airport and the City Council, we recognised the need to ensure that the citizens of Birmingham benefit from the increased employment opportunities. For this to happen, it is necessary for the City Council to work with partners, to make an early start and gain an understanding of the likely projections with regard to job types and numbers, thus allowing for the necessary training to be put in place.
- 4.10 We would also emphasise the importance of ensuring benefits are shared by those most in need. The airport is located near to some of Birmingham's more deprived areas and training and recruitment should be focused in these areas. East Birmingham has been designated a new growth point by the Government with the possibility of an increase in the number of dwellings by 3000 or 6000. Funding has been received to develop the proposals. The expansion of Birmingham Airport should be a catalyst for economic growth and jobs in that area.

### **Suggested Actions**

- 1. Building on the work being done as part of the Constituency and Neighbourhood Employment and Skills Plans in East Birmingham, the City Council's Employment Access Team should work closely with Birmingham International Airport to ensure that local people have access to the job opportunities created.**

## **5 Economic Benefits – Attracting and Retaining Investment**

- 5.1 Our second line of enquiry related to is the increased potential for attracting investment that the Airport and the extension would bring, including:
- Assisting with attracting inward investment in an increasingly competitive environment;
  - Assisting local companies to be more outward looking and to penetrate new markets;
  - Support the retention, expansion and commercial success of companies already present in the Region.<sup>12</sup>

<sup>11</sup> Briefing Note from the Head of Planning Strategy, Birmingham City Council – Evidence File available in Scrutiny library



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5.2 Birmingham Chamber of Commerce and Industry sees the airport as critical to business success: one of its five major transport policy priorities is the expansion of Birmingham International Airport (alongside the improvements to New Street Station).<sup>13</sup>

5.3 Advantage West Midlands (AWM) asserts that “the airport is one of a number of features in the region which makes the Coventry, Solihull and Warwickshire area particularly attractive to inward investors.” Using the airport to build on other features of the region – access to London, availability of high level skills and universities, access across the UK and quality of life – AWM has promoted the region and:

... has secured a number of successful investments into the region in the last couple of years including Airbus Research and Development centre and the LaFarge headquarters relocation from Oxfordshire.

5.4 The Airport’s Master Plan states that:

Many studies and surveys have demonstrated that international airports can exert a significant impact on the level of economic activity in the areas which they serve, and on the location decisions of businesses and companies.

5.5 Specifically it advised that having an international airport enables:

- Manufacturing companies in the West Midlands to maintain their competitive positions;
- Better “connectivity” to the high technology corridors being developed in the region (e.g. the A38 Central Technology Belt);
- Supported growth of universities in the region;
- Greater opportunities for the leisure, tourism and events sectors – which we will consider later in this report.

## The Runway Extension

5.6 The runway extension is seen as critical to maximising these benefits:

It is critical to note the shift in the global economic centre of gravity to South and East Asia which we can anticipate to continue and which will itself be a growing source of mobile investment. In the absence of direct connection to these markets the concern must be that our ability in the city/ region to exploit them will be materially curtailed. Already it is clear that German cities – which Birmingham would regard as part of its international peer group (e.g. Frankfurt/ Munich) – are benefiting from such direct connections into China and India.<sup>12</sup>

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<sup>12</sup> Briefing Note provided by Development Directorate, Birmingham City Council – Evidence File available in Scrutiny library

<sup>13</sup> Briefing Note provided by Birmingham Chamber of Commerce and Industry – Evidence File available in Scrutiny library



- 5.7 The airport company believes that Birmingham is “currently being disadvantaged, in terms of air travel, by runway capability”<sup>14</sup>. Long-haul destinations currently served by Manchester include Abu Dhabi, Chicago, Doha, Las Vegas, Miami, Philadelphia and Singapore. In addition there are many flights with different airlines to airports in New York. By comparison Birmingham has a daily flight to New York (Newark) with Continental Airlines, a recently commenced service to Philadelphia with US Airways and a twice daily service to Dubai with Emirates Airlines. Evidence from the airport suggested that the airport is currently losing an estimated 100,000 passengers flying to Los Angeles per year to Heathrow. The extension of the runway would allow daily flights to Los Angeles.
- 5.8 In the view of AWM, it is therefore unsurprising that much of the West Midlands business community prefers to travel to either London Heathrow or Manchester to fly direct to their destination rather than flying from Birmingham via a European hub airport.<sup>15</sup> This has implications for productivity: the Airport Master Plan suggests that, with the runway extension, 4 million hours and £93 million (at 2006 prices) will have been saved by 2030 by reduced journey times to and from airports.
- 5.9 AWM state that growth of foreign investment into Birmingham and the broader region is seriously constrained by the airport runway. The East-West non-stop flight limits from Birmingham are currently Delhi and Chicago. It is not possible currently to fly with viable flight loadings of passengers, freight and fuel to Mumbai and the rapidly growing cities of southern India, to China, and the major transport hub in Singapore. This is and will increasingly become a significant competitive disadvantage for the region.
- 5.10 Advantage West Midlands (AWM) has contributed significant support to the runway extension and has in principle earmarked a £25m contribution towards the Airport Company's overall £120m estimated cost of scheme implementation, plus around £200,000 of AWM funding has been spent on specialist financial, commercial, legal and socio-economic technical expertise to support AWM's project related activity. Moving forward, further significant AWM expenditure will continue to support both the development and appraisal of the wider economic benefits for the region which are expected to result from the connectivity to developing and emerging global economies via new direct long-haul services. There will also be support for pursuing and securing the requisite funding approvals.<sup>16</sup>
- 5.11 York Aviation noted the difficulties in providing robust quantitative estimates of the impact of the airport on investment and the retention of investment:

“This reflects the fact that, for example, company location decisions are made on the basis of a cocktail of factors and it is not possible to isolate what is

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<sup>14</sup> BIA Master Plan ibid

<sup>15</sup> Information provided by AWM – Briefing Note

<sup>16</sup> Information provided by AWM, May 2009



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specifically attributable to an airport or, to any even greater degree, a specific investment such as a runway extension.”<sup>17</sup>

5.12 However, evidence provided by Birmingham City Council’s Development Directorate reported that the York Aviation study on the economic impact of the runway extension found that, overall:

- By 2030, the runway extension would generate 2,610 extra full-time equivalent jobs and an extra £113m (at 2006 prices) across the West Midlands Region, compared to Birmingham International Airport without the extension. In Birmingham alone, the extension would result in 410 more full-time equivalent jobs and £54m more in income (at 2006 prices) in 2030 than without the extension;
- The capital investment programme associated with the runway extension would support 370 extra full-time equivalent jobs and generate £8.2 million of extra income (at 2006 prices) across the West Midlands Region (no separate estimate of the impact on Birmingham was made).

5.13 Ecotec argued that the planned runway extension and a greater range of long-haul destinations will “unlock the more dynamic and far reaching (catalytic) impacts on productivity in the regional economy, and hence on potential GDP and employment growth.”<sup>18</sup>

## Economic Benefits – Events

5.14 One specific area of economic benefit that is expected to benefit from the runway extension is the events industry. Birmingham International Airport is located next to the National Exhibition Centre (NEC) and is a short train journey from the International Convention Centre (ICC) in Birmingham city centre.

5.15 We heard evidence that attracting more international conferences and events would augment the £6billion contribution made to the economy by business tourism, as it not only entails people coming to the region for the day but may encourage them to stay overnight or bring family and spend a longer in the region.

5.16 Evidence from the NEC Group informed us that there is a “1:15 economic multiplier which occurs during events at NEC Group venues” and that this is a key driver of the region’s economy. A KPMG study in 2008 reported that the venues supported up to £2 billion in direct and indirect expenditure (including local hotels, restaurants, florists, bars, taxi firms and other suppliers) and 29,000 jobs.<sup>19</sup>

5.17 However, the NEC Group currently view the lack of long-haul flights from Birmingham International Airport as a constraint on their ability to attract new custom. We were informed by

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<sup>17</sup> Birmingham International Airport Limited: Birmingham International Airport proposed runway extension – Economic Impact Assessment – Final Report, York Aviation, December 2007 - page 45

<sup>18</sup> Briefing note from the Head of Planning Strategy

<sup>19</sup> Briefing Note from The NEC Group



the Group that currently a significant number of their delegates are forced to travel to London and then make an overland connection to Birmingham. Therefore, an improved route network with long-haul services from key US, Middle East and Asia destinations, will provide both the NEC and the International Convention Centre (ICC) with the ability to attract major international events, which are currently unwilling to locate a show so far away from major international connections within which an airport plays a key role.

5.18 Examples given of international events that the NEC would be better placed to bid for when the extended runway is in operation included:

- An international screen printing industry event could be attracted if visitors were able to fly in direct from the major international customer countries – one of the organiser's key considerations;
- An annual European food ingredients exhibition (three day event with 20,000 visitors and 1200 exhibitors from across the world) would have a potential impact of almost £5m due to the number of international visitors and the length of tenancy;
- A pharmaceutical ingredients show (three day event with 25,000 visitors and 150 exhibitors) which tours Europe currently finds that its UK (NEC) event is smaller than those held in rival European cities as the NEC is relatively inaccessible for international delegates, and therefore chooses to locate at the NEC only rarely. The economic impact for the region would be a potential £6m.

5.19 In September 2008 AWM approved a £3 million contribution to a £12 million Marketing Birmingham led Business Tourism project including regional partners AWM, NEC and the airport in promoting the region's world class facilities. The project will also look to attract conferences and exhibitions in the region's primary investment markets, providing a unique opportunity to showcase the region's strengths and opportunities to a captive international business audience.<sup>20</sup>

### **How Can Birmingham City Council Help Maximise These Benefits?**

5.20 All witnesses commented on the need for Birmingham to be a "world class international gateway" to accrue all the "economic and reputational benefits" associated with that status.<sup>21</sup> The general consensus from the witnesses was that the airport runway extension was necessary to enable long-haul flights and thus open up wider economic markets.

5.21 We note that whilst Birmingham International Airport does currently lag behind other airports such as Manchester, in terms of connectivity to long-haul destinations a number of airports in other European secondary cities have similar flight connectivity to Birmingham. Whilst the runway extension at Birmingham International Airport provides the opportunity, we must acknowledge that the runway extension alone will not automatically result in airlines wishing to operate direct

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<sup>20</sup> Briefing note from AWM – evidence file lodged in the Scrutiny library

<sup>21</sup> Briefing note from NEC Group – evidence file lodged in the Scrutiny library



## Overview of Regional Airports – Maximising the Benefits for Birmingham

long-haul flights from the airport. To ensure that these opportunities are maximised, pro-active work needs to be undertaken to develop routes and work with airlines. Evidence suggests that the airlines would provide additional flights/new destinations if sufficient evidence was provided to them of a genuine business opportunity.

5.22 As the Community Strategy and Council Plan make clear, the City Council is committed to supporting the airport and the runway extension. There are therefore specific activities that the City Council can pursue to exploit the opportunities afforded by the airport and the proposed runway extension. They include:

- Support for route development;
- Partnership working, including improved communication;
- Leading by example;
- Involvement in promotional activity to encourage businesses to locate in Birmingham.

5.23 We were told that, currently “less than 40% of the region’s demand for air travel is served within the region, with 36% of people in 2006 relying on airports in the south-east”.<sup>22</sup> To encourage more passengers to use Birmingham Airport work needs to be done around **route development**.

5.24 We were informed that there have been discussions by representatives of AWM and by the Leader of Birmingham City Council with the airport on route development. For example, the Leader has been involved in discussions over route development into India by Jet Airways and Kingfisher. It was suggested that the City Council and its partners could further assist by exploring the setting up of a cross-functional team, comprising representatives from the City Council, AWM, Marketing Birmingham and the airport, to meet on a regular basis and discuss the opportunities for a more collaborative approach to route development.

5.25 The team could investigate applying for setting up a Route Development Fund to support airlines through the difficult launch period of a new route. For example, Newcastle Airport and One North East have recently worked together to attract a new Emirates service, bringing critical inbound business passengers from worldwide destinations through the Emirates hub in Dubai.

5.26 Another part of their remit could be to identify ongoing opportunities for support (such as the annual 'Routes' conference), and serve to prioritise funds to specific campaigns as required.<sup>23</sup> It could also consider those working to identify those companies with satellite premises near to Birmingham and where their parent premises are located, to see if attracting another company from the same international cities would facilitate route development.

5.27 We were informed that there are also opportunities to attract and retain airlines by persuading training companies to locate a base in Birmingham. All BMI flight staff training was carried out in

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<sup>22</sup> Briefing note from NEC Group – evidence file lodged in the Scrutiny library

<sup>23</sup> Briefing note from AWM – evidence file lodged in the Scrutiny library



London. A move of at least some of these operations to Birmingham would benefit the airlines both in terms of travel costs and time for employees.

- 5.28 The airport company emphasised the importance of **partnership working** and the importance of **communication** with Birmingham City Council:

The nature and span of the City Council is such that the airport team is not always informed (or informed early enough) of opportunities to support inbound/outbound visits and delegations. When information is received it is often too late to input to, and add value to, the format of visits and events. A co-ordinated approach, at senior level, would guarantee the most efficient use of scarce resources for all concerned.

- 5.29 This links to work around regional and local marketing and promotional activity: both generally – to raise the profile and perceptions of Birmingham as a global city – and in specific markets:

The City Council and AWM could further develop and improve the way in which the regional proposition (sales offer) is articulated. This specifically relates to opportunities within Information and Communication Technologies, Business and Professional Services and automotive engineering.

- 5.30 Initial work is already underway with a consultancy project commissioned by AWMs inward investment team which was completed during March 2009. This research information is now being used to enhance the regional proposition in specific clusters.

- 5.31 We also received evidence that closer work with Locate Birmingham and the airport would be beneficial, with a regular and systematic process in place.

- 5.32 In terms of events, we were informed by representatives of the NEC Group that there is now a proven model for joint bidding for certain strategic events (NEC Group, AWM, Marketing Birmingham, Birmingham City Council and Birmingham International Airport). A marketing support package has been created to attract and retain key events such as the Spring Fair and Party Conferences, with support from other agencies including the NEC Group, AWM and increasingly the airport.

- 5.33 Both the NEC and the ICC are investing significantly in research to support bids for new business targets, with the NEC group having created market-specific teams, such as that with University Hospital Birmingham, to look at particular markets. There is now a joint airport/NEC Group Strategic Board to enable them to successfully grow.

- 5.34 The airport suggests that it is “anomalous that the City Council uses other airports for travel arrangements. This sends out mixed messages. Most global destinations are available by ‘hubbing’ from Birmingham”. It was suggested that the Council could **lead by example** and ask that



# Overview of Regional Airports – Maximising the Benefits for Birmingham

Members and officers, when travelling by air, travel via Birmingham International Airport – wherever that represents best value for money.

- 5.35 It should also be noted that as the City Council owns a stake of the airport company, there are opportunities to influence the current and potential future suppliers of Birmingham International Airport. The Birmingham Economic Development Partnership (BEDP) Executive Board, chaired by the Chief Executive of the City Council, is currently developing proposals for an event to support improved access by Small and Medium Enterprises (SMEs) to key public procurement opportunities, potentially as part of a wider programme of engagement with local SME suppliers. This could be extended to the airport.

## Suggested Actions

2. **The Leader / Cabinet Member for Regeneration should work together with AWM, Marketing Birmingham and the airport to ensure the business offer is marketed as fully as it could be where new routes are developed i.e. Philadelphia and where new routes could be encouraged.**
3. **The Cabinet Member for Regeneration, under the Local Area Agreement proposals, should assist local businesses to attain contracts pertaining to the airport expansion (both in its construction and operation).**

## 6 Economic Benefits – The Visitor Economy

- 6.1 Marketing Birmingham provided us with detailed information on the importance of the visitor economy to Birmingham.<sup>24</sup> Key facts include:
- The Birmingham tourist industry generated over £4.3 billion expenditure in 2007;
  - Birmingham attracted around 32 million visitors in 2007;
  - It is the fifth most visited city by overseas visitors in the UK, particularly by those visiting friends and relatives.
- 6.2 Evidence from the airport company confirmed that holidays and visiting friends and relatives were the main reasons for passengers using BIA in 2007.
- 6.3 Marketing Birmingham also put forward a number of ways in which the runway extension will add value to the visitor economy, including:
- New markets – eight out of the top 15 overseas visitor markets are long-haul. Birmingham is currently excluded as a gateway destination to the majority of these markets and their potential is likely to grow. The World Tourism Organisation has predicted that outbound tourism from China will increase from 20 million trips in 2005 to 100 million trips in

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<sup>24</sup> Briefing note from Marketing Birmingham – evidence file lodged in the Scrutiny library



2020 – creating a market worth over £100 billion. They suggest that China will become the fourth largest source of international travellers, behind Germany, Japan and USA.

- Local patronage – Only 36 % of the region’s market for air-travel is served by BIA. Improved capacity will increase outbound volumes which will have a direct impact on airlines’ decisions to establish new routes. In addition the region may well benefit from increased demand for overnight stays in the vicinity of the airport.<sup>24</sup>

**Table 5: Journey Purpose, BIA 2007<sup>25</sup>**

<b>Journey Purpose</b>	<b>% total</b>
<b>Holiday Inclusive Tour</b>	31%
<b>Visiting Friends/Relatives</b>	28%
<b>On Business</b>	19%
<b>Holiday Air Fair Paid Separate</b>	16%
<b>Trade Fair/Exhibition</b>	1%
<b>Conference</b>	1%
<b>Educational Studies</b>	1%
<b>Other (airline staff, migration, armed forces, merchant navy)</b>	3%

6.4 Marketing Birmingham, using recently secured funding from Advantage West Midlands, and is planning to extend its ‘Visit’ campaign to attract foreign visitors for city breaks. ‘Visit’ is the culmination of Marketing Birmingham’s previous lifestyle campaigns. The primary aim of ‘Visit’ is to attract a higher spending leisure tourist who will stay overnight in the city.

6.5 Evidence from Birmingham City Council Economic Development officers noted:

There is a confidence that the emergence of highly aspirational (and fast growing) middle classes in these territories with a likely appetite for goods and experience (such as international tourism) which have characterised similar groups in the West will be a driving phenomenon. Direct connectivity will be a vital component of capacity to exploit this.

### **How Can Birmingham City Council Help Maximise These Benefits?**

6.6 Exploiting both Birmingham and the surrounding regions tourist potential involves maximising the links to business tourism:

<sup>25</sup> Source: BHX Passenger Survey 2007



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More broadly, in the most successful global cities, business tourism begets leisure tourism – delegates either remain in the host city longer for a leisure break after their business is done or they bring family with them whilst on their business trip. This is an acknowledged missed opportunity for Birmingham and indeed many other UK cities.<sup>26</sup>

6.7 An example includes the Rotary 2009 event – over 25,000 delegates and their families are expected to visit Birmingham and many are likely to add a holiday on to their visit.

6.8 Capturing these benefits requires greater partnership working in terms of promoting the region:

There is also a need for more joined-up marketing of the region, e.g. support for the work of Tourism West Midlands and, for the city, Marketing Birmingham as well as better coordination to ensure local hotels and providers benefit from and activity support the winning of major events (address stock, marketing, service and pricing issues).<sup>27</sup>

6.9 There is already much work being done: Marketing Birmingham are considering opportunities for a second phase of Visit – an international campaign focusing on selected destinations and airlines to attract overseas visitors to Birmingham. One focus is likely to be to promote Birmingham as the gateway to the region.

6.10 Marketing Birmingham has also established an award winning event support package to ensure customers get the best possible experience of the city (this is essential as one in four business visitors return to the city as leisure visitors).<sup>28</sup> The service includes venue location, social programme planning and sourcing hotel accommodation etc.<sup>29</sup>

6.11 In relation to the city being a key leisure destination, Marketing Birmingham with the support of AWM is planning campaigns in Ireland and Germany this year. They have also supported the creation of Birmingham Arts Partnership, including the development of a new co-ordinated cultural campaign with leading cultural venues and performing companies including Birmingham Hippodrome, Birmingham, Royal Ballet, CBSO and others.

6.12 Marketing Birmingham is also working in partnership with Airlines including Bmibaby, Flybe, Ryanair and KLM and with Visit Britain on joint promotional activity. Further work with regional partners such as Shakespeare Country will also examine opportunities in the US, Japan and other long-haul markets.

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<sup>26</sup> Briefing note from NEC Group – evidence file lodged in the Scrutiny library

<sup>27</sup> Briefing note from NEC Group – evidence file lodged in the Scrutiny library

<sup>28</sup> Information provided by Marketing Birmingham

<sup>29</sup> [http://www.visitbirmingham.com/birmingham\\_convention\\_bureau/event\\_support\\_package/](http://www.visitbirmingham.com/birmingham_convention_bureau/event_support_package/)



- 6.13 It is certainly true that Birmingham has much to offer: Birmingham is being marketed as a shopping destination of choice; and the Cabinet Member for Leisure, Sport and Culture emphasised Birmingham's cultural attractions, including Symphony Hall and Artsfest (a free annual festival of arts).
- 6.14 However, we were not convinced that these were marketed as fully as they could be. As with route development there is an opportunity for the City Council and its partners to become more joined-up and co-ordinated, so that when new routes come online (such as the recent Jamaican and Philadelphia routes), the opportunity for an inbound campaign in order to attract overseas visitors is fully exploited.
- 6.15 There are wider issues here too: ensuring we provide a better visitor offer includes better signage and information – Birmingham Airport had trialled a Birmingham tourist information stand in the past, which had not worked. Birmingham Airport felt that this was a service that needed to be provided by the public sector. Other issues related to improved accessibility (see section 8).
- 6.16 We note that Bmibaby were happy to put city break packages together for Birmingham to encourage visitors to the city, however what was required was for Birmingham City Council to work closely with ground agents to promote city breaks with regard to events/activities/sites.

### Suggested Actions

- 4. The Cabinet Member for Leisure, Sport and Culture and the Cabinet Member for Regeneration work together with AWM, Marketing Birmingham and the airport to ensure the cultural offer is marketed as fully as it could be where new routes are developed i.e. Philadelphia and where we want to encourage new routes.**

## 7 Other Benefits

- 7.1 As noted above, visiting friends and relatives is one of the main reasons for passengers using BIA, and currently, much of the inbound traffic is from relatives of Birmingham residents from Irish families.<sup>30</sup> However, we know that Birmingham residents have cultural and family links to a wide range of long-haul destinations and the runway extension would allow better connectivity with these regions.
- 7.2 Another benefit relates to journey time savings – i.e. Birmingham residents not having to travel to another airport. The Civil Aviation Authority Survey (London, Manchester, Birmingham, and regional airports (April 03 – March 04) applied to 2006 volumes) states that only 36% of passengers one hour drive time from Birmingham are served by Birmingham International Airport. The remaining are served by Manchester (11%), London Airports (34%), Nottingham East Midlands (14%), Coventry (2%) and others (3%).

<sup>30</sup> Evidence from Airport company, 23 September 2008



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## How Can Birmingham City Council Help Maximise These Benefits?

- 7.3 As above, there are opportunities to improve cultural partnerships – for example working with AWM and Marketing Birmingham in a new coordinated campaign with leading cultural venues and performing companies including Birmingham Hippodrome, Birmingham, Royal Ballet, CBSO and others.
- 7.4 In respect of journey times, one issue that will maximise these benefits relate to transport links to and from the airport – and these are discussed in the next section.

## 8 Transport Links to and from the Airport

- 8.1 During our examination of issues relating to maximising the benefits of the airport and proposed runway extension, there has been one recurring theme: transport links to and from the airport. It is likely that if people cannot easily get to the airport, they could be more easily persuaded to use other airports, regardless of proximity. It is also true that, in order to exploit fully the employment opportunities, there should be easy accessibility from East Birmingham. Indeed transport links should be a benefit resulting from the existence of the airport to residents of East Birmingham.
- 8.2 Some of our witnesses considered transport links to the airport to be good – particularly as the airport is situated at the centre of motorway network. However, there were a number of recurring issues:
- Availability of public transport – both for those working at the airport and for those flying in or out of the airport;
  - Congestion – on the whole road links are good with the airport located at centre of motorway network but congestion is a disincentive;
  - Links to destinations beyond Birmingham for both tourist and business purposes – to encourage people to stay longer and visit.
- 8.3 Most passengers using BIA get to and from the airport by private car. In 2006, the Public Transport Modal Share was 20.2% and rail accounted for 11.7% of the airport's passenger surface access. The Airport Master Plan contains long term targets to increase use of public transport to 30% of passengers by 2020 and 35% by 2030. To support this, an Airport Surface Access Strategy and Travel Plan were drawn up, to build on the Multi Modal Interchange facility that was opened in 2003.
- 8.4 In relation to public transport, one of the key issues was the lack of transport via bus or rail for staff or passengers to coincide with the first wave of early morning services at the airport. Flights at BIA commence at around 0600 – which means passengers must arrive at the airport at around 0400 – yet the earliest trains from Birmingham New Street to Birmingham International train station arrives after 0530. On a Sunday flights also commence at around 0600 whereas the earliest train arrives at Birmingham International train station after 0830. In contrast, there are trains from



Manchester Piccadilly to Manchester Airport arriving at 0415 on a weekday and 0435 on a Sunday, and passengers from Sheffield can reach Manchester Airport as early as 0500 (0900 on a Sunday).<sup>31</sup> In discussing recruitment issues, the airport company reported that “public transport remains an issue”.<sup>32</sup>

Unlike other airports with Railway Stations (e.g. Manchester, Stansted, Gatwick), there is no 24-hour rail service pattern; nor is there an appropriate night bus network.

- 8.5 It was also noted that the long and protracted engineering work at weekends and bank holiday during the upgrade of the West Coast Mainline acted as a serious disincentive to access by rail and should be avoided for the future without appropriate liaison and notice.
- 8.6 Birmingham International Airport (BIA) priorities for rail include:
- Completion of the West Coast Mainline modernisation programme to improve journey times between BIA and London;
  - The maintenance of a frequent and reliable service to Birmingham New Street;
  - Additional direct services to destinations within the airport's catchment area; and
  - The provision of more early morning services, particularly from Birmingham New Street, in recognition of the importance of this period for departing flights.<sup>33</sup>
- 8.7 Supporting the airport expansion, particularly in terms of providing 24/7 feeder services, is included in the Integrated Transport Authority's West Midlands Rail Vision: Network Development Strategy.
- 8.8 Areas Centro are looking at to improve links to the airport include:
- Introduction of the rapid transit solutions between Birmingham City Centre and the airport area, including linking through the Eastern Corridor;
  - Introduction of longer trains serving Birmingham International Rail Station and continued exploration with train operators to find ways for providing early morning and late night services;
  - Improved bus services provision through the night and in particular early morning and late evenings.
  - Improvements to ticketing and passenger information.
- 8.9 Centro also noted that travel plans have a significant role to play in promoting and securing appropriate provisions for public transport, walking and cycling. Centro is working closely with BIA

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<sup>31</sup> As at February 2009

<sup>32</sup> Briefing Note from Birmingham International Airport – Evidence File available in Scrutiny library

<sup>33</sup> Evidence received from Birmingham International Airport



## Overview of Regional Airports – Maximising the Benefits for Birmingham

in developing initiatives to encourage staff to travel to work by sustainable modes of transport and BIA's proposal to appoint a full time dedicated travel plan co-ordinator is welcomed and will allow this working relationship to develop further.

- 8.10 In terms of how employees get to and from the airport, the airport has previously supported a staff bus scheme, but this did not attract sufficient patronage to achieve 'critical mass'.
- 8.11 Improvements can also be made to ticketing: we were informed that the airport was in discussion with railways and bus service providers to look at integrating services for add on tickets, but that dealing with multiple providers was an obstacle.
- 8.12 The possibility of a Metro line between Birmingham city centre and the airport was discussed. Birmingham Airport was supported and committed to Metro links to the airport and South Birmingham as beneficial to both the local community and to link visitors to intercity lines. We were informed that there was some reluctance on the part of Government to fund new Metro schemes in recent years. However, in consultation with the Integrated Transport Authority, the Coventry Road corridor was identified as favoured location for Metro line development, although given the timescales for the development of Metro schemes, it is unlikely that a Metro line along the Coventry Road would be built within the next 15 years.
- 8.13 Road links are also important and do relate to public transport issues: the BIA/NEC Public Transport (Airport NEC Integrated Transport Access) Scheme is being taken forward by Solihull Metropolitan Borough Council to put in place highway infrastructure improvements including bus priority, bus lanes and new links for buses and coaches serving the airport, the NEC and Birmingham International Station. The scheme has been accepted by the Government. Work will start in September 2009 and complete at the end of 2010.
- 8.14 Evidence received indicated that, in the longer term, the M42 and Junction 6 are not expected to have sufficient capacity. Active Traffic Management has been introduced on this section of M42 and is currently being extended onto the M6. The airport company has invested in new road links to the A45 and M42. Again, the Master plan seeks to make improvements: long term improvements to Junction 6 of the M42 – the main highway access – are planned as is additional on site car parking located north of the A45.
- 8.15 The excellent accessibility by road has been a significant factor in the airport's success to date, and it is important that this is maintained and developed for the future.

### **How Can Birmingham City Council Help Maximise These Benefits?**

- 8.16 The aims to improve ground transport links and in particular public transport links between the city and the airport are welcomed; however there is still some way to go on this.
- 8.17 Public transport links – for passengers and staff – could be significantly improved. There are some positives: the rail link to Birmingham city centre is fast and frequent, though only during the day. There are wider issues here: rail sector forecasts indicate an increase in passenger numbers of around 2-3% per year and that capacity will have been reached on the West Coast Mainline



around 2025. Feasibility studies to test the viability of proposals for a new North/South high speed rail line should take into account interconnectivity with the airport.

- 8.18 Bus travel links could also be improved, and we also believe that a serious attempt to increase public transport use in travelling to and from the airport should include consideration of a Metro line between the city centre and the airport. In December Arriva Trains Wales services were extended from New Street to Birmingham International. This has expanded direct links.
- 8.19 The overall issue is one of connectivity between the airport and East Birmingham and the city centre. Whilst it was relatively easy to transport individuals into the city centre, there were weaknesses with regard to the transportation access arrangements in place between different areas of the city and Birmingham International Airport.
- 8.20 Linked to better promotion of the region is improved accessibility between tourist areas such as Stratford-Upon-Avon and Birmingham (thereby ensuring that visitors could access local tourist attractions on a day trip basis). This should include integrated travel/transfers bookings (plane and train) and improved train journeys.
- 8.21 Providing good information for visitors on arrival at Birmingham International Airport is also important. One option would be to consider the introduction of a travel shop – similar to that at New Street Station – at the airport.

### **Suggested Actions**

5. **That the Cabinet Members for Regeneration and Transportation and Street Services press rail and bus operators with the support of the airport and Centro for improved transport links, including later and earlier bus and rail services and more orbital routes, to the Birmingham International Airport.**
6. **That the Cabinet Member for Transportation and Street Services continues to support the move towards integrated ticketing and services for public transport across the city to the airport/NEC.**



## Appendix A – List of Witnesses

- Joe Kelly, Acting Managing Director, Birmingham International Airport (BIA)
- Crawford Rix, Managing Director of Bmibaby
- Peter Vella, Business Development Director, BIA
- David Bull, Assistant Director Development Strategy; Birmingham City Council
- Dave Carter, Acting Head of Strategy & information; Birmingham City Council
- Chris Haynes, Head of Transportation Strategy; Birmingham City Council
- Katie Teasdale and Brian Summers, Birmingham Chamber of Commerce & Industry
- Geoff Inskip and John Sidebotham, Centro
- Mick Laverty, Chief Executive, Advantage West Midlands (AWM)
- Jack Glonek, Assistant Director, Investment, Enterprise and Employment; Birmingham City Council
- Veronica Docherty, Head of Economic Strategy; Birmingham City Council
- Cabinet Member for Leisure, Sport and Culture; Birmingham City Council
- Paul Thandi, Chief Executive, NEC Group
- Neil Rami, Chief Executive, Marketing Birmingham
- Niall Duffy, FlyBe (written response)