

Manchester Airports Group (MAG)

# A superhub for the North

How Manchester  
Airport can drive  
economic growth  
and rebalancing

# A superhub for the North

## How Manchester Airport can drive economic growth and rebalancing

The economic performance of the North lags behind the rest of the UK and has done for many years. This is due, in part, to long-term underinvestment in the North. While successive governments have pledged to address these disparities, productivity and wages in the North remain below the South.

The analysis within this report – produced by Arup and supported by York Aviation – shows that Manchester Airport can play a prominent role in closing this economic gap and enabling the North to compete on a national and international stage. Our report assesses scenarios for future growth and explores the airport’s potential contribution to the economy through to 2050.

International travel changes our perspectives – it opens our minds to new experiences, cultures, and knowledge. It also creates new opportunities to trade goods, services, and ideas. Manchester Airport strengthens the North’s global connectivity by facilitating direct access to international business destinations and leading innovation districts across the globe.

Our analysis demonstrates that to achieve its full potential as the North’s superhub, Manchester Airport needs to be integrated with strategic regional road and rail connections. That means ensuring the airport is at the heart of plans for high-speed rail and full Northern Powerhouse Rail (NPR).

Integrating with key infrastructure will enable people and businesses across the North to take advantage of the global connectivity the airport provides, in a way that would transform the experience, raise productivity and bring the North closer to the world.

Manchester Airport needs to be a critical component of plans to rebalance the UK economy and drive higher productivity and growth in the North. With sustained policy support and investment, a new trajectory of growth and higher prosperity is within reach.

### A vision of Manchester Airport in 2050

We have modelled what transformational growth would look like for the North and Manchester Airport, building on the growth scenarios set out in the *Economic Scenarios for the Northern Powerhouse Independent Economic Review*, published by Transport for the North (TfN) in 2023.

Four scenarios set out different potential futures for the North and the airport under varying economic, policy and investment conditions. Our analysis demonstrates the potential scale of Manchester Airport’s impact in 2050 in a transformational growth scenario. This scenario would see the North sustain economic growth and social benefits, steadily closing the current gap with the rest of the country over the next 25+ years.

The transformational growth scenario is illustrative of the scale of growth possible in the North if there are significant improvements in connectivity between the North and the rest of the country, including London and Birmingham, alongside delivery of additional investment in areas such as skills, innovation, engaging communities and promoting cultural connections. It also includes the continued commitment from the airport that future growth is delivered in a sustainable way, including achieving net zero airport operations by 2038.

With the right investment, policy and collaboration, our analysis shows that Manchester Airport will be a key driver of transformational growth for the North, in particular:

- + TfN’s transformational growth scenario is forecast to generate £118 billion of additional national GVA growth by 2050, which is a 23% increase compared with the baseline scenario. This increase is driven by investment in transport infrastructure, a higher performing economy, and greater inward investment.
- + At the same time, within this growing Northern economy, Manchester Airport is forecast to increase its national economic contribution from £6.6 billion in 2022 to £18.9 billion by 2050 – an increase of 120% compared to a baseline scenario. This difference represents almost 7% of the additional GVA forecast for the entire national economy under the transformational growth scenario.
- + A transformational growth scenario would see on-site jobs increase by more than 50%, compared to approximately 10% in a baseline scenario.
- + The transformational growth scenario sees the airport grow to more than 60 million passengers and raise its profile and competitiveness as a major European airport, offering over 50 new long-haul routes to key global destinations. Under the baseline scenario, passenger growth is still achieved more in line with business-as-usual growth, building on existing services.

Combining these findings highlights the significance of Manchester Airport as a driver of economic growth in the North. Under a transformational growth scenario, there is a step change in connectivity, with Manchester Airport becoming a bigger global gateway with access to new and growing markets, with direct connections to some of the most important global key cities.

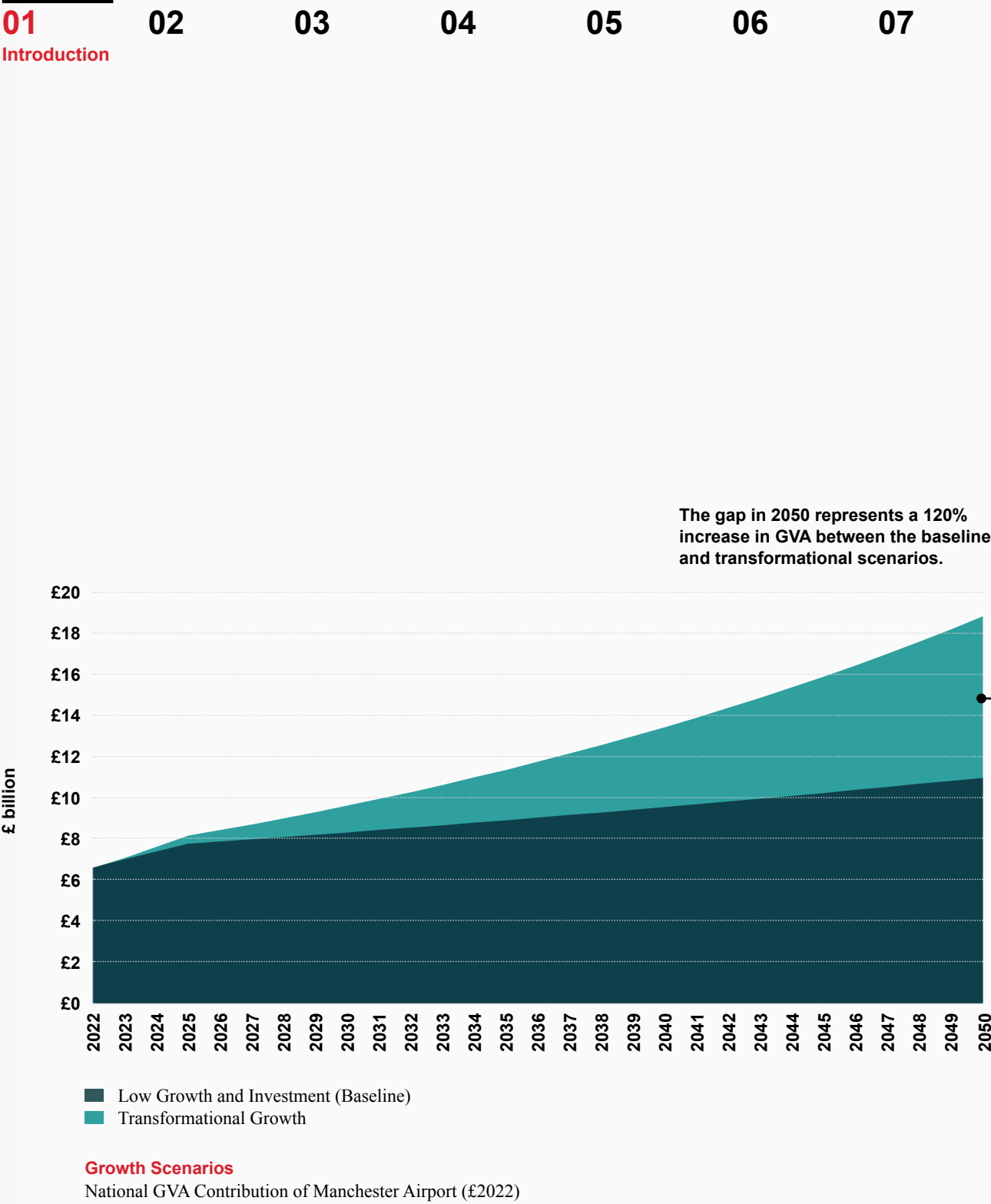
The future economic prosperity of the North is dependent on breaking a cycle of underinvestment. This report demonstrates how investment can create a positive, virtuous cycle that supports business growth, and further inward investment for the North. Increased investment will unlock further opportunities and economic growth, shifting the North towards a transformational growth scenario. Without this investment, businesses will lack the confidence, innovation, and connections to grow, creating a vicious cycle which will see the North’s performance gap persisting and a continued imbalance in economic and social outcomes for the North.

**Manchester Airport will create a more prosperous and connected North**

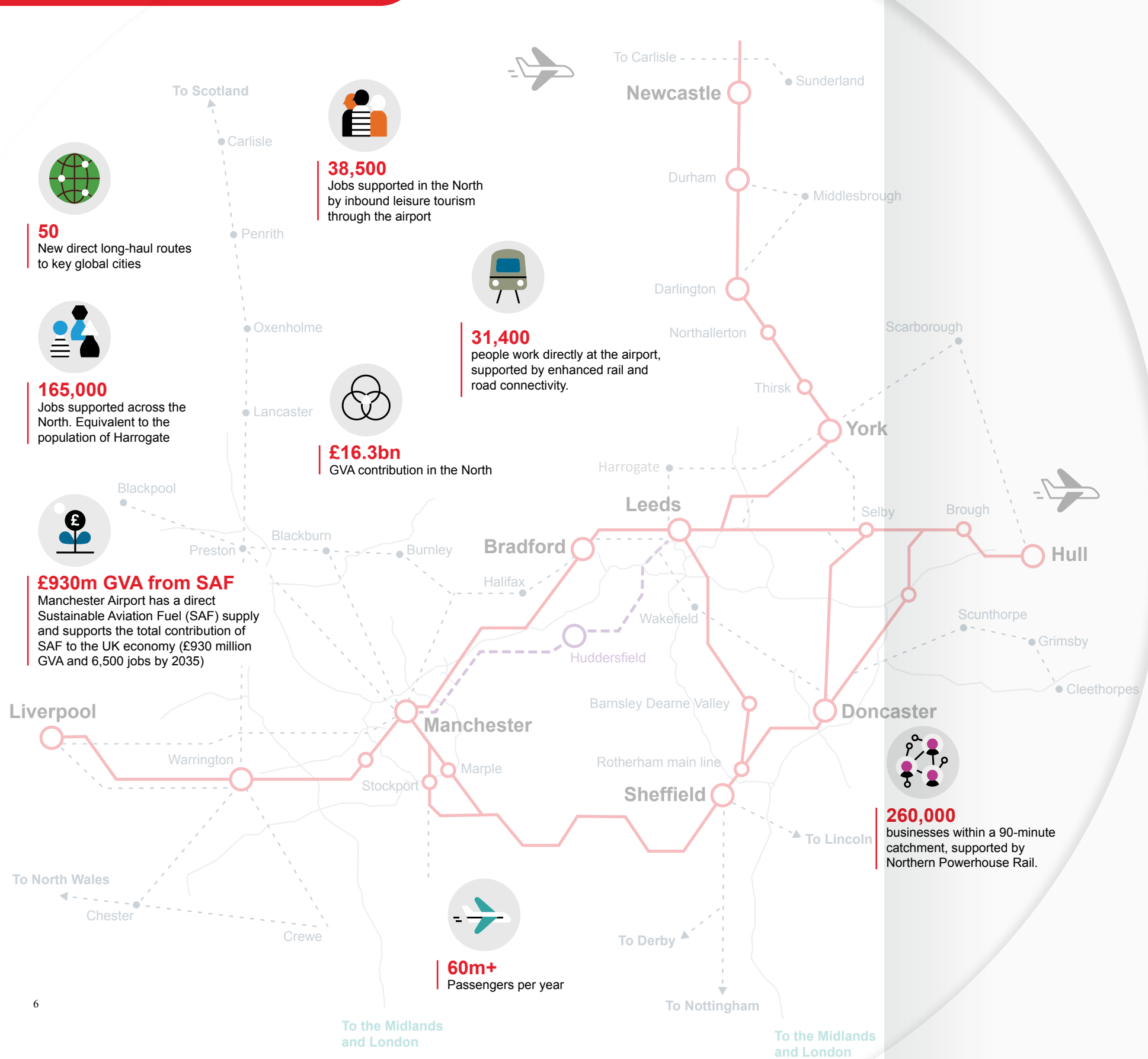
The North could not compete on a national and global stage without Manchester Airport. Our research and analysis demonstrates that, with the right policies and investment, Manchester Airport can help deliver transformational change for the North, with the following potential impacts:

- 1 GVA impact in the North tripling** from £5.7bn in 2022 to £16.3bn in 2050.
- 2 Potential for over 50 new additional direct long-haul routes opening by 2050**, compared to around 25 direct long-haul in 2022.
- 3 Around 25 new direct short-haul routes opening by 2050**, in addition to over 130 direct short-haul today.
- 4 Number of people working at Manchester Airport rising to 31,400 by 2050<sup>1</sup>** from 20,200 today.
- 5 Supporting 165,100 people in employment across the wider economy of the North by 2050<sup>2</sup>**, rising from 80,700 people today. This is equivalent to the population of Harrogate.
- 6 Supporting 38,500 jobs through inbound leisure tourism in the North by 2050**, rising from 15,700 jobs today.
- 7 260,000 businesses can access Manchester Airport within 90-minutes with Northern Powerhouse Rail<sup>3</sup> by 2050**, compared to 70,000 businesses today.
- 8 Potential for over 60 million passengers per year by 2050**, compared to the 27 million today.
- 9 Connections to almost 50 additional key global cities by 2050** (defined as GaWC Alpha and Beta cities). These connections mean Manchester Airport will have global connectivity similar to that of Frankfurt (Germany), Dubai (UAE), Istanbul (Turkey), Amsterdam (Netherlands) and Doha (Qatar) today.

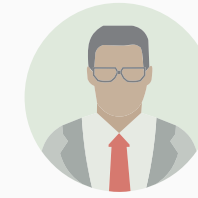
<sup>1</sup> Direct On-site and Direct Off-site.  
<sup>2</sup> Total Employment Impacts includes Direct On-site, Direct Off-site, Indirect, Induced, Business Productivity – Passengers, Business Productivity – Freight, Inbound Tourism  
<sup>3</sup> Transport for the North, “At a glance: Northern Powerhouse Rail”, [TFTN\\_-\\_NPR\\_At\\_a\\_Glance.pdf \(transportforthenorth.com\)](#)



## Manchester Airport superhub for the North



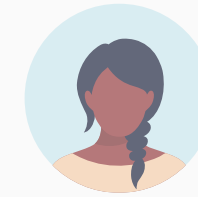
## Manchester Airport in 2050



**Anish**  
University  
Chairperson

### Innovation

We have boosted our standings in research over the past decade by attracting some of the best and brightest talent from across the world. We are known as a university that bridges the gap between research and business, and you can see the impact in our city with all the new firms starting up around the university. Having a major global airport makes it so much easier for us to put our university on the world stage.



**Rita**  
Inward Investor  
from California,  
USA

### Investment

I have worked in Silicon Valley for 20 years, building some exciting companies and apps. But over the past decade, we have been investing more into tech hubs around the world. I started meeting firms from Manchester, and I saw they were doing exciting work in health tech. We rely upon Manchester Airport's success to deliver our own; the airport connects us with the rest of the world, and the quality of local and regional transport infrastructure helps us to attract the best talent and seek new business partners. Now I hold Manchester and Leeds up there with the other global tech players, and we are having great success with our investments here.



**Muhammad**  
Bradford Business  
Owner

### Business

I have been building my company that manufactures advanced optical equipment for over 20 years. We were invited on a trade mission with the Department for International Trade in 2030, and that is when we made our first connections with customers in India. Since the regular direct flights opened to Hyderabad, we have grown our revenue by 40 percent with more than one-third of our customers coming from India. I am so proud of how far we have come and that we took the leap to build the business abroad.



**The Taylor  
Family**  
Local residents

### Community

We have lived in Wythenshawe for ages. Our grandparents moved here in the early 2000s, so we have a long-standing community here. Some people are surprised we live so close to the airport, but we have a really lovely community here. We had a grant to improve the glazing and soundproofing in our home, so we don't really notice the planes. It's a real asset having the airport on our doorstep. With kids, it cuts out some of the challenge and cost of travelling. We love our holidays and always take two a year, no matter what. I think it has also opened our kids' eyes to what else is out there in the world, knowing that a gateway to so many places is just next door.



### Actions required to achieve transformational growth

Manchester Airport has the potential to be the superhub for the North, underpinned by strategic road and rail connections, strengthening the North's global business connectivity by facilitating direct access to international business destinations and leading innovation districts across the globe.

MAG, through its Manchester Airport operations, will work closely with a wide range of partners to achieve these shared ambitions. However, a transformational change for the North will require supportive policy and economic conditions and investment. To achieve transformational growth, the following priorities need to be delivered:

- 1 Government should build certainty and confidence in the UK market to help attract international investment through committing to a long-term plan.**  
The airport and partners should work closely with the Department for Business and Trade to support existing businesses in the North to trade internationally and attract new business activity to the North.
- 2 Deliver high-speed rail links to provide critical connectivity and unlock growth across the North.**  
Any future version of HS2 and infrastructure from NPR and TRU must provide critical connectivity that links major northern conurbations to a Manchester Airport station. This will bring businesses, jobs and communities closer to one another and to international expansion facilitated by the airport.

- 3 Investment in roads and public transport to become more convenient and affordable, enabling modal shift and reducing congestion and journey times across the whole of the North, to and from Manchester Airport.**  
Airports are truly multi-modal hubs, but investment is needed in transport infrastructure, allowing for more of the North to benefit from an integrated public transport system (such as the Bee Network in Greater Manchester) to encourage behavioural change and increase modal options to and from the airport to the whole of the North.
- 4 Government and national policy should recognise Manchester Airport as a vital piece of infrastructure that supports the flow of inward investment.**  
National strategy and policies should recognise the whole UK aviation industry as strategically important, together with the specific contribution of Manchester Airport to the economic growth of the North.
- 5 Supercharge government funding and policy support for aviation sustainability and R&D to establish the UK as the world leader in sustainable aviation.**  
Leverage Manchester Airport, key universities and research institutions across the North who are already leading the way, to drive innovation in sustainable aviation technology and operations. This could allow the UK to be a world leader in creating a sustainable aviation industry, with Manchester Airport matching this ambition through its commitment to net zero operations by 2038.



- 6** **The UK aviation strategy should be cross-departmental to have a coordinated approach to policy for aviation growth, trade, economic development, and wider transport investment.**  
Government needs to provide a stable and attractive investment environment for international businesses, working across Whitehall and local government.
- 7** **Government should provide strategic route support to help open up new international routes, such as APD holidays for three years on long haul routes.**  
The recovery of UK international connectivity after the pandemic has been slower than in other European countries, in part because of the disincentive of measures in the UK such as APD. The Government should consider the potential for short-term measures, such as APD holidays for new routes, to accelerate the growth of connectivity – increasing tax revenues in the longer term while also delivering the wider benefits of that connectivity for the North.
- 8** **Local Visitor Economy Partnerships should be given long term funding settlements with safeguarded funds to drive inbound tourism to regions in the North from key markets.**  
Manchester Airport needs to increase the amount of inbound visitors, and working with partners such as tourism bodies and Local Visitor Economy Partnerships would allow it to build on their existing work. Safeguarded funding for those bodies would allow them to connect the North to equivalent economic and social clusters overseas, such as serving important business markets like India and North America and expanding to unserved tourism routes like Bangkok.
- 9** **The national tourism strategy should recognise the offer across the North and support the work of Local Visitor Economy Partnerships at the local level to increase inbound travel to the North.**  
This will support in increasing the spread of tourism spend across cities in the North and places of interest.
- 10** **Greater access to and investment in education and training programmes to support the aviation industry.**  
Access to education and training programmes will create quality employment opportunities at the airport, supporting career progression, reducing barriers to work, and inspiring the next generation into the aviation industry. This should be delivered in collaboration with universities, further education colleges and other training providers across the North to support skills development in future sectors and developing the North as an attractive place to live, work and invest in.
- 11** **Allow more flexibility with the Apprenticeship Levy to enable funding to be spent where needed the most, including lifelong learning.**  
This should be led by the Department for Education to support Manchester Airport to increase its ability to adapt and respond to changes in the sector and future skills. Investing in the skills for the future aviation industry will ensure the airport and local people are equipped for the future and can adapt to change. This will ensure the skills of people across the North remain resilient and competitive and are able to access future opportunities available at Manchester Airport and throughout the supply chain.

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- 12** **Ensure global talent can access universities and research institutions across the North.**  
Through collaboration between the Department for Education, the Home Office, and universities across the North, access to international institutions and students will enhance the import and export of knowledge, supporting increased innovation in the region. Expanding connections to international destinations will open up new markets within economically important cities, supporting increased investment across the North.
- 13** **Manchester Airport should ensure local partners can benefit from the growth and capitalise on the opportunities from the airport.**  
The airport should build on and mobilise existing partnerships with businesses, universities, and educational institutions across the North to reduce barriers to work and inspire the next generation into the aviation industry. However, greater certainty is required to develop a shared vision with stakeholders, communities and places and realise the transformational opportunity and impact over the longer term.
- 14** **Build on the success of place-based partnerships to support trade and international dialogue in priority markets.**  
Initiatives such as the Manchester China Forum and Manchester India Partnership have successfully supported trade and international dialogue in priority markets. The airport and city regions across the North should repeat this approach with a focus on key unserved opportunities in Asia and North America, which would benefit from a joined-up approach that creates links between two city regions with growing industries of the future.
- 15** **Manchester Airport should continue and expand the positive engagement with community groups.**  
Support from community partners and businesses to engage on a local, regional, and Northern scale, across a mix of demographics will open up opportunities to more people from a range of backgrounds. Through engaging with a wide mix of communities, Manchester Airport can ensure a high standard of diversity and inclusion in employment and supply chain opportunities to positively impact the North.



# Working together to achieve the North’s potential

Arup was commissioned by MAG to give national and local decision makers the facts about Manchester Airport’s impact on the wider economy, society and its potential to drive future prosperity across the North. The original research demonstrates that, with engagement, proactive policies and investment, society can get the greatest value out of Manchester Airport as a superhub for the North, and maximise its contribution to growth, prosperity, and rebalancing.

MAG, through its Manchester Airport operations, will work closely with a wide range of partners to achieve these shared ambitions. Through greater international connectivity, the airport will support the growth of the North by improving access to

international travel, supporting the growth of key sectors, attracting talent, and incentivising international businesses to locate across the region.

The findings should be used by decision makers to shape a wide range of transport and economic policies, as they demonstrate how taking an integrated approach can unlock the full potential of the North.







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Introduction

# Manchester Airport

The North could not compete on a national and global stage without Manchester Airport. Access to international travel changes our perspectives—it opens our minds to new experiences, cultures, and knowledge. It also creates new opportunities to trade goods, services, and ideas.

**For businesses in the North**

This means they can find new customers, new suppliers, or attract investment from abroad.

**For people in the North**

It means easier and more affordable trips abroad to explore new places, visit friends and family, or relax from their hard work.

**For international leisure visitors**

It means a chance to see the North of England, and beyond—to experience culture, sport, nature, and history.

**For universities and institutes**

It means attracting the best talent—both students and academics—from all over the world to work, study, and share ideas.

**Business visitors**

It means a chance to attend conferences and corporate events, to meet and connect with other great minds in quality venues across the North.



These international connections send ripples through the economy and communities across the North of England. Tourism, for example, brings higher visitor spending to high streets and museums. When people from abroad visit the cities and communities across the North, it builds global awareness of the North’s unique culture, identity and offer. This increases the likelihood that more people from a wide range of global destinations will want to visit places in the North and explore and experience more of the UK rather than focussing on London.

The connections and the activities at Manchester Airport also have meaningful impacts on local communities. Today, 20,200 people work at Manchester Airport across different parts of the aviation industry. The airport has a supply chain with broad reach, from North Wales to the North East. It supports community groups and works with students to inspire the next generation of aviation workers.

Manchester Airports Group (MAG), the owner of Manchester Airport, is proud to collaborate with communities, businesses, and local government partners across the North to work towards a better connected, more prosperous future. Through these relationships, MAG creates genuine partnerships that work towards shared aims.

**This Research Report**

Manchester Airport is a critical component of plans to rebalance the UK economy and drive higher productivity and growth in the North. With sustained policy support and investment, a new trajectory of growth and a higher quality of life is in reach. Manchester Airport needs to be integrated with strategic regional road and rail connections. That means ensuring the airport is at the heart of plans for high speed rail including Northern Powerhouse Rail. Integrating our key infrastructure will enable people and businesses across the North to take advantage of the global connectivity the airport provides, in a way that would transform the experience today, raise productivity and bring the North closer to the world.

Arup’s original and new analysis with York Aviation shows that Manchester Airport can play a prominent role – as the North’s superhub – accelerating the growth of the North and enabling the North to compete on a national and international stage. Our report assesses scenarios for future growth and explores the airport’s potential contribution to the economy to 2050.

This research report draws from a wide range of data sources, including MAG’s accounts, annual reports, and other corporate data; publicly available data, such as from the Office for National Statistics; an independent and respected aviation forecasting model developed by York Aviation; published research reports, such as the Northern Powerhouse Independent Economic Review; and a wide range of interviews with MAG employees and external partners.

The findings of the research should be used by decision makers to shape a wide range of transport and economic policies, as they demonstrate how taking an integrated approach can unlock the full potential of the North. In each chapter, we set out the role Manchester Airport plays in securing a more prosperous, inclusive, and sustainable future for the North.





Context

Manchester Airport’s reach is broad. Customers and employees come from across the North, as well as the Midlands, Wales, Scotland, and the rest of the UK. The focus of the report is the North, but the reach is national. The impacts the airport generates in the North contribute to the UK economy and making the most of UK assets. Where possible, more detail is provided that includes impacts beyond the North of England.

The aviation industry has wide impacts across the country and the world. Contributing to a sustainable aviation future is of utmost importance to MAG. Aviation will reach net zero by 2050 and MAG is fully committed to leading the industry in reaching that goal in addition to its commitment in line with Greater Manchester that its operations will be net zero by 2038. This report highlights the importance of industry, airlines, and government working together to drive the delivery of aviation decarbonisation. Manchester Airport aspires to play a leading role in this transition, and this report touches on some of the key achievements to date. However, the future sustainability of aviation is not a key focus of this report; not because it is not critical, but because it is a complex and international issue that is already the subject of many other studies and working groups. This report aims to cover a wide range of topics and issues and focus on the elements that MAG can have greater influence over for the economic and social benefit of the North.



Manchester Airports Group and Manchester Airport

Manchester Airports Group (MAG) is the largest UK airports group, owning and operating three UK airports - London Stansted, Manchester and East Midlands. MAG sees over 60 million passengers flying through its airports every year, which together employ over 38,000 people on site. The three airports have a catchment area covering 75% of the UK and serve 260 global destinations.

MAG’s ownership structure comprises an effective blend of public and private shareholders, including Manchester City Council (35.5%), IFM Investors (35.5%) and the nine other Greater Manchester local authorities (29%). This means that MAG’s success is intrinsically tied to the success of Greater Manchester, generating returns for its shareholders. In turn, Greater Manchester’s success is tied to the rest of the Northern Powerhouse—the collective of cities and communities in the North of England.

This report represents Manchester Airport’s role and vision for the North in shaping a better future.





# The Future Prosperity in the North and the role of Manchester Airport

## Section 2



# A vision of Manchester Airport in 2050

The future prosperity in the North and the role of Manchester Airport

## The North's future success, built on today's strengths.

It is 2050. The infrastructure surrounding Manchester Airport is world class. High quality train connections are serving Manchester Airport, bringing national and regional passengers to its door. Northern Powerhouse Rail enables seamless travel across the Pennines, providing fast connections from towns and cities across the North which allows for the transfer of skills, knowledge, and innovation.

Passengers at Manchester Airport, either arriving or departing, might be tourists excitedly starting their holiday or business people looking at trade deals and investments, growth opportunities, or marketing their potential to an international network. The catchment of the airport has expanded and driven significant growth. It has also reaffirmed the North's significant global brand as a region rich in industry, innovation, and creation.

In 2050, across the North, the world-class cities are buoyed by the superhub at Manchester Airport, an airport that proudly connects the North to the world.



The North's success is founded on its historic industries alongside its new ones. Government's strategic investment back in the 2020s has helped business in the North grow more quickly by investing in infrastructure, skills, and business support. Now, the North is punching above its weight in supporting the UK economy.

The North in 2050 is rich in thriving industries at the leading edge of technology, with a highly skilled workforce, abundant in creativity and innovation, and operating in a highly ambitious business market that competes with major international hubs. The economy is inclusive, with opportunities across all skills levels and better access to jobs through public transport within cities and between them.

The network of businesses across the North is highly productive. Investment in rail and roads, as well as public transport in cities, has supported stronger business networks and trade at a scale that couldn't have been achieved before. Whether an entrepreneur

or in a FTSE100, businesses feel connected locally, regionally, nationally, and internationally, with Manchester Airport acting as the superhub of the North.

People are proud of their place, with an immense feeling of civic pride. A growing economy has attracted public and private investment in towns and cities across the North. The public realm, parks and countryside are all woven into a landscape of cities, towns and villages with high quality housing, high performing schools and local amenities that all walks of life can enjoy.

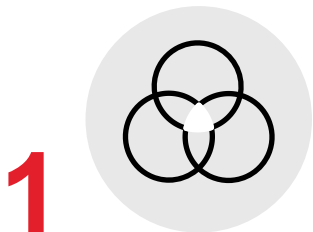
The North's success has been built on partnerships, with Mayors and local leaders building a strong sense of collaboration between the public and private sector to drive growth and stronger communities.



# Five key principles in 2050

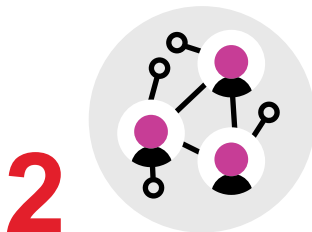
From the early 2020s, there were five key principles that – working together – allowed a hive of activity and investment to emerge, providing a platform for growth that the region is still benefitting from today, in 2050.

Manchester Airport played an integral role in each of these principles, but it was through genuine partnership that success was achieved.



**Manchester Airport, the superhub in 2050**

There is a clear recognition of the strategic role the airport plays in the growth of the wider economy and investment decisions. Global connections are the lifeblood of a thriving economy. Businesses operate in an increasingly globalised world, where competitiveness drives productivity and growth. Investment in developing new global routes has opened up the North to the rest of the world, and the rest of the world to the North. With more than 50 new direct long haul routes opened between 2022 and 2050, Manchester Airport has opened up trade and investment opportunities across the North. More people than ever can easily reach the airport thanks to transformational high-speed rail, and this super-connectivity across the North combined with the international links at the airport have created a superhub for the North.



**Supply chain and job opportunities in 2050**

The total number of jobs created by Manchester Airport in the North has increased to 165,100 from 80,700 back in 2022<sup>4</sup>. The airport has supported a range of jobs through supply chain and employment growth, developing a more vibrant North, with increased opportunities for local communities. The airport has always - and will continue to - support local employment on its site. Yet its new connections to local towns and cities, its reach into the North and globally have created a much wider range of employment and skills opportunities than just those at the airport itself. These jobs have been created through new sectors forming and historic sectors having the right platform for growth through connections.

<sup>4</sup> (Total Employment Impacts includes Direct On-site, Direct Off-site, Indirect, Induced, Business Productivity – Passengers, Business Productivity – Freight, Inbound Tourism)



**Aviation innovation in 2050**

Manchester Airport recognised early on that leadership in aviation innovation in the North is essential for a more sustainable future. Through working with airlines and government on the delivery of aviation decarbonisation, MAG has delivered on its net zero commitment. They have also been keen partners in developing sustainable aviation fuels including having a direct pipeline to the airport, partnering on hydrogen innovation, and working with investors, universities, and government to transform the sustainability of aviation.



**Local pride, tourism, and investment in 2050**

The infrastructure investment that both the local authorities and MAG have delivered has elevated civic pride and renewed confidence and aspirations in the region's economic position. Collectively, these partners have long placed quality spaces and community cohesion at the heart of their investment decisions. Working collaboratively through LVEPs who have funding settlements that have driven inbound tourism through raising the profile of cities, towns and attractions across the North on the global scale. Now, the investment in communities has changed how people see their own places as well as how the world sees the North of England.



**Partnerships in 2050**

The driver for successfully delivering investment and growth over the past 25 years has been dominated by excellent partnership working and a shared voice between the public and private sector. As a result of MAG's partnership working, investment in major transport infrastructure has driven the potential of the airport. Local people can access a wide range of careers at the airport and throughout the supply chain through a more coordinated skills and employment strategy. And the co-ownership model has tied the airport's success to Greater Manchester's success, so that the dividends from growth are paid back into the community.

# Economic and social prosperity

Five ways Manchester Airport will support the North's economic and social prosperity

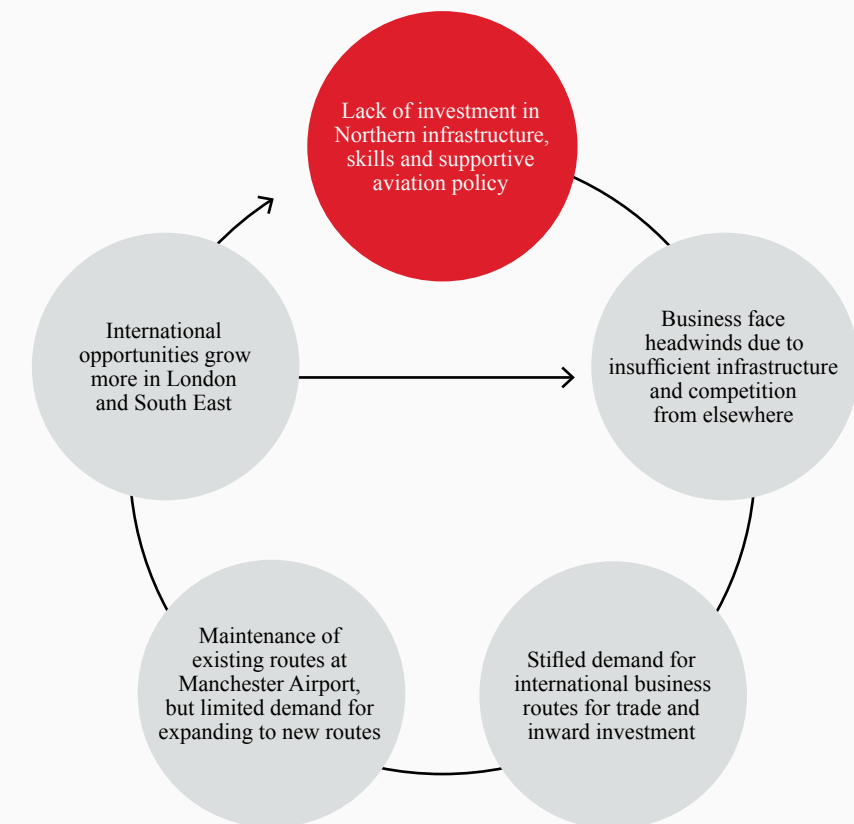
The North—with all its talent, businesses, strong communities, and natural assets—plays a significant role in the national economy, and it has the potential to achieve higher economic growth, higher productivity, and a better quality of life for residents.

International trade, investment, and tourism will play an important role in growing the economy in the North, especially to close the gap with the South. Manchester Airport will bring thousands of businesses and communities in the North even closer to the rest of the world by opening new routes for tourism and business travel. In turn, major markets will be within closer reach of opportunities to invest in the North.

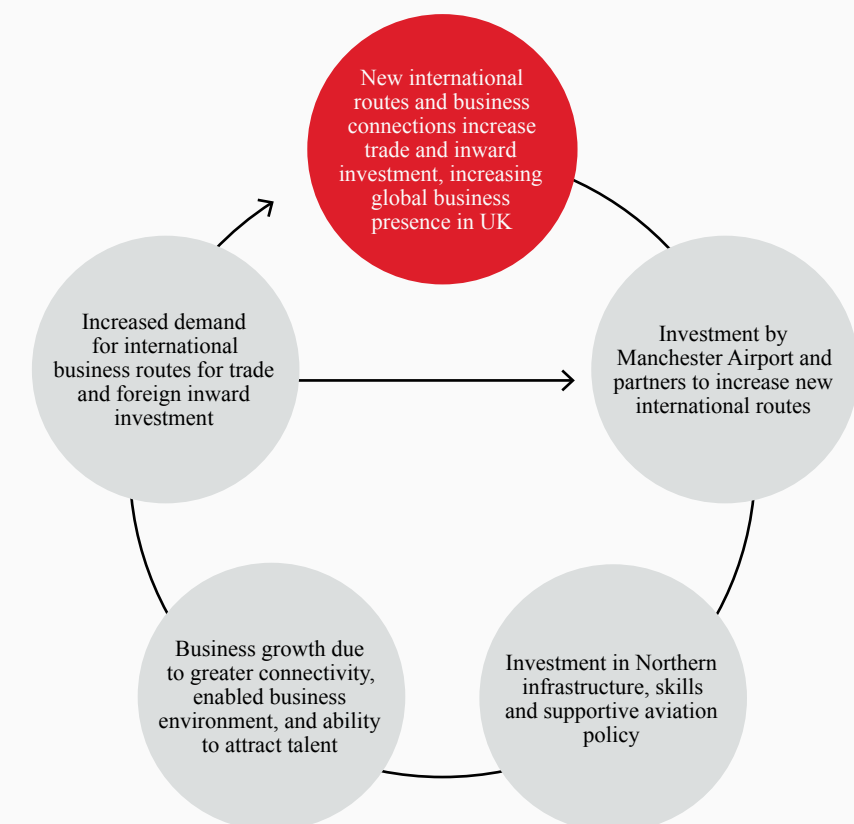
With collaboration and investment from government and partners on major projects like new high-speed rail links across the North and programmes to invest in skills and innovation, the airport will create a step change in the economic growth and support for communities across the North.

Investment in the North will deliver faster economic growth, higher productivity, and rebalancing to the national economy. Transport for the North set an ambition for growth and investment in the 2023 Northern Powerhouse Independent Economic Review that can achieve transformational social and economic development. Alongside MAG's investment in Manchester, in partnership with industry, local and national government, the North is set to raise its national and international profile as an economic powerhouse and improve opportunities and outcomes for people across the North. This investment can create a positive, virtuous cycle that supports businesses, investment, and growth. But, without that investment, businesses will lack the confidence, investment, and connections to grow, creating a vicious cycle of challenges.

## Vicious Cycle



## Virtuous Cycle





# 1.

**Manchester Airport's impact on jobs and supply chain stretches across the North, and its GVA impact in the North would nearly triple between 2022 to 2050.**

Economic benefits created by Manchester Airport are far reaching across the North, North Wales and the Midlands. The airport connects and creates economic opportunities for communities and businesses across the North, supporting local supply chains and the growth of future sectors and skills in the industry. By targeting employment locally and opening opportunities across the North, the airport creates jobs accessible to everyone.

The airport provides quality employment for people across the North within the aviation industry. It also supports a diverse mix of industries, such as advanced manufacturing, aerospace, tourism, tech and life sciences, which are critical to the regional economy and need the connectivity opportunities that the airport offers. The investment in the growth of the airport will strengthen the competitiveness of these sectors and create more jobs for people across the North.

Enabling infrastructure such as high-speed rail links will expand the catchment area of the airport, connecting more communities and businesses across the North, and contributing to increasing access to opportunities generated by the airport in an economically and socially impactful way.



**£5.7bn**

Manchester Airport currently directly supports 20,200 jobs and total employment impacts of 80,700. The current total GVA impact of the airport in the North is £5.7 bn.

**£16.3bn**

The airport could expand total employment across the North to over 165,000. Total GVA impact of the airport in the North is £16.3 bn in 2050.

**The Opportunity to 2050**

Since the Covid-19 pandemic, productivity rates in the North have recovered faster than the rest of the UK. Manchester Airport currently directly supports 20,200 jobs and a total 80,700 jobs across the North. Looking forward, with the right investment in skills needed for the future aviation industry and enabling infrastructure, the airport could expand total employment to over 165,100 in the North — more than the population of Harrogate - covering a wide range of skills to support productive and quality jobs across the North.

**Action required to achieve transformational growth**



**Government should build certainty and confidence in the UK market to help attract international investment through committing to a long-term plan.**

The airport and partners should work closely with the Department for Business and Trade to support existing businesses in the North to trade internationally and attract new business activity to the North.



**Deliver high-speed rail links to provide critical connectivity and unlock growth across the North.**

Any future version of HS2 and infrastructure from NPR and TRU must provide critical connectivity that links major northern conurbations to a station at Manchester Airport. This will bring businesses, jobs and communities closer to one another and to international expansion facilitated by the airport.



**The UK aviation strategy should be cross-departmental to have a coordinated approach to policy for aviation growth, trade, economic development, and wider transport investment.**

Government needs to provide a stable and attractive investment environment for international businesses, working across Whitehall and local government.



**Greater access to and investment in education and training programmes to support the aviation industry.**

Access to education and training programmes will create quality employment opportunities at the airport, supporting career progression, reducing barriers to work, and inspiring the next generation into the aviation industry. This should be delivered in collaboration with universities, further education colleges and other training providers across the North to support skills development in future sectors and developing the North as an attractive place to live, work and invest in.



**Allow more flexibility with the Apprenticeship Levy to enable funding to be spent where needed the most, including lifelong learning.**

This should be led by the Department for Education to support Manchester Airport to increase its ability to adapt and respond to changes in the sector and future skills. Investing in the skills for the future aviation industry will ensure the airport and local people are equipped for the future and can adapt to change. This will ensure the skills of people across the North remain resilient and competitive and people are able to access future opportunities available at Manchester Airport and throughout the supply chain.



**Manchester Airport should ensure local partners can benefit from the growth and capitalise on the opportunities from the airport.**

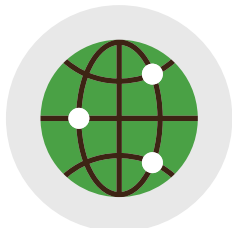
The airport should build on and mobilise existing partnerships with businesses, universities, and educational institutions across the North to reduce barriers to work and inspire the next generation into the aviation industry. However, greater certainty is required to develop a shared vision with stakeholders, communities and places and realise the transformational opportunity and impact over the longer term.

# 2.

**Global connections are essential for the North's long-term development, and Manchester Airport could open more than 50 new direct long haul routes connecting the North to the world.**

The North is reliant on international connections to compete for businesses, talent, and investment on a national and international scale. Today, Manchester Airport provides essential infrastructure, supporting Northern businesses to compete by acting as their global gateway and offering interconnectivity and global reach to superhubs such as the Middle East, increasing the ease of trade and tourism. This has been demonstrated through the Manchester – Beijing service, which in the first two years of direct flights, increased levels of growth in trade, tourism, and knowledge exchange between the North and the Far East, outstripping national averages.

Due to historical lack of public and private investment in the region, the North is performing below its weight. Businesses in the North are innovative and productive, but they lag behind the growth of the South. Manchester Airport contributes to reducing the productivity gap through its expansion of international connections to Europe, long haul destinations and growth markets, which enables businesses across the North to export, innovate, exchange knowledge, and attract investment from abroad.



**70k**

Manchester Airport has global reach to key markets, supporting businesses across the North to compete globally (currently 70,000 businesses within 90-minutes)

**260k**

Manchester Airport has the potential to be a superhub for the North, expanding routes to key growth markets and supporting 260,000 businesses within 90-minutes.

Manchester Airport has the potential to be the superhub for the North, underpinned by strategic regional road and rail connections, and strengthen the North's global business connectivity by facilitating direct access to international business destinations and leading innovation districts across the globe.

Today, Manchester Airport enables businesses within the catchment already to trade internationally. With investment in infrastructure like NPR and road enhancements, the catchment will expand to reach more businesses. With the better connectivity across the North and internationally, the airport could attract new businesses to the North, both overseas companies seeking a foothold in the UK and UK businesses looking to expand operations due to growth in the North.

**The Opportunity to 2050**

The North is a major destination for international businesses, and Manchester Airport provides global business and supply chain connectivity and market reach. Over time, the airport will build on its existing long-haul network to develop a wide and growing range of connections to other global hubs in key regions such as the US, India, China and the Middle East. Through investment in high-speed rail links and infrastructure and with the right policy support, the airport could develop to more than 50 new direct long-haul routes, maximising international opportunities for businesses across the North in sectors and markets that are growing fastest. This would allow Manchester to compete with the likes of Dubai and Schiphol.

International connectivity created by Manchester Airport supports tourism, culture, investment, jobs and knowledge exchange. By increasing connections to other world cities, Manchester Airport will bring businesses and communities across the North closer to international opportunities. This will create a step change in the economic growth and support communities in the North, reducing the economic and social gap in the UK.

Action required to achieve transformational growth



**Investment in roads and public transport to become more convenient and affordable, enabling modal shift and reducing congestion and journey times across the whole of the North, to and from Manchester Airport.**

Airports are truly multi-modal hubs, but investment is needed in transport infrastructure, allowing for more of the North to benefit from an integrated public transport system (such as the Bee Network in Greater Manchester) to encourage behavioural change and increase modal options to and from the airport to the whole of the North.



**Government and national policy should recognise Manchester Airport as a vital piece of infrastructure that supports the flow of inward investment.**

National strategy and policies should recognise the whole UK aviation industry as strategically important, together with the specific contribution of Manchester Airport to the economic growth of the North.



**The UK aviation strategy should be cross-departmental to have a coordinated approach to policy for aviation growth, trade, economic development, and wider transport investment.**

Government needs to provide a stable and attractive investment environment for international businesses, working across Whitehall and local government.



**Government should provide strategic route support to help open up new international routes, such as APD holidays for three years on long haul routes.**

The recovery of UK international connectivity after the pandemic has been slower than in other European countries, in part because of the disincentive of measures in the UK such as APD. The Government should consider the potential for short-



term measures, such as APD holidays for new routes, to accelerate the growth of connectivity – increasing tax revenues in the longer term while also delivering the wider benefits of that connectivity for the North.

**Local Visitor Economy Partnerships should be given long term funding settlements with safeguarded funds to drive inbound tourism to regions in the North from key markets.**

Manchester Airport needs to increase the amount of inbound visitors, and working with partners such as tourism bodies and Local Visitor Economy Partnerships would allow it to build on their existing work. Safeguarded funding for those bodies would allow them to connect the North to equivalent economic and social clusters overseas, such as serving important business markets like India and North America and expanding to unserved tourism routes like Bangkok.



**27m**

Today there are 27 million passengers per year with 185 destinations available through Manchester Airport and 50 airlines operating out of the airport.

**60m+**

Manchester Airport could handle 42 million passengers by 2040 and potentially over 60 million by 2050, as part of a transformational economic scenario for the North.



# 3.

**Investment in international connectivity will support a more innovative North, and MAG invests in a more innovative and sustainable aviation industry.**

Universities, research institutes and businesses rely on access to the best and brightest talent from around the world to innovate. More direct access to world cities and their universities and innovation centres will help institutions in the North to attract top rate talent for work, study and major conferences and events. Highly innovative places, like Silicon Valley and Boston, have a greater propensity to fly, because they attract international talent, host international conferences, and collaborate further afield. Investment in new routes at Manchester Airport can underpin access to talent and ideas for businesses and institutes around the world, supporting growth of important clusters across the North.

The North requires international travel to grow the economy and compete internationally, but the people and the environment require that the aviation sector finds new technology to make flying more sustainable. MAG has been a thought leader in aviation innovation, both in sustainability (as the first carbon neutral airport operator in the UK, for example) and in the rapid growth and democratisation of air travel over the last 30 years. Now – through CAVU, the Group’s airport product and services company – MAG is working across the global aviation industry to improve every part of the airport travel experience. Manchester Airport can maximise opportunities in emerging technologies such as sustainable aviation fuel to deliver green jobs and investment across the North. Through

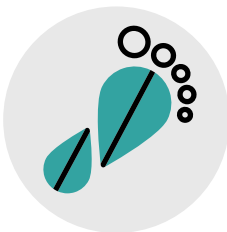
investment in sustainability research and innovation, the airport can ensure the North remains competitive and can adapt.

The aviation sector is constantly evolving—adopting new technology to make flying safer, more affordable, and more efficient. Investment and collaboration between MAG and research institutions across the North will help respond to and realise the benefits from expected changes across the aviation industry such as automation, electrification, digitalisation and data sharing.

**The Opportunity to 2050**

Manchester Airport will provide the foundation for opening up businesses and institutions across the North to talent from around the world, and the North’s talent to engage with innovation abroad. New routes to more talent will support more investment in innovation, attract new ideas, and support the growth of knowledge-based sectors and clusters in the North.

Manchester Airport can establish itself as the most innovative airport in the country. Through working with airlines and government on the delivery of aviation decarbonisation, the airport can maximise its economic potential by ensuring growth is sustainable and on-track to net zero. Through investment in new technologies, supported by research and collaboration with business and universities, the airport is committed to providing a safer, better and more sustainable airport of the future. By investing in and engaging with sustainable aviation fuels and hydrogen, the airport will help lead the way for the aviation industry to become more sustainable as well.



**2026**

Manchester Airport aims to become the first UK airport with a direct pipeline of Sustainable Aviation Fuel (SAF)

**£930m**

SAF is a significant future opportunity with the potential to support the UK economy with £930 million in GVA annually and 6,500 jobs by 2035.

Action required to achieve transformational growth



**Supercharge government funding and policy support for aviation sustainability and R&D to establish the UK as the world leader in sustainable aviation.**

Leverage Manchester Airport, key universities and research institutions across the North who are already leading the way, to drive innovation in sustainable aviation technology and operations. This could allow the UK to be a world leader in creating a sustainable aviation industry, with Manchester Airport matching this ambition through its commitment to net zero operations by 2038.



**Greater access to and investment in education and training programmes to support the aviation industry.**

Access to education and training programmes will create quality employment opportunities at the airport, supporting career progression, reducing barriers to work, and inspiring the next generation into the aviation industry. This should be delivered in collaboration with universities, further education colleges and other training providers across the North to support skills development in future sectors and developing the North as an attractive place to live, work and invest in.



**Ensure global talent can access universities and research institutions across the North.**

Through collaboration between the Department for Education, the Home Office, and universities across the North, access to international institutions and students will enhance the import and export of knowledge, supporting increased innovation in the region. Expanding connections to international destinations will open up new markets within economically important cities, supporting increased investment across the North.

# 4.

**Increased international connectivity will attract tourism, support local pride and create cultural connections**

The airport supports thriving communities by creating international access from business and leisure tourists to destinations across the North. Spending in high streets, attractions, hotels, and events from tourism provides a major boost to local economies. Through the Manchester – Beijing service there was a 38% increase in the number of Chinese visitors to the North between 2016 and 2018 with the average spend per visit in the North West increasing by 94%. Connectivity to international destinations has an impact on the local economy and tourism industry, and today 15,700 jobs are supported by inbound leisure tourism in the North, and 38,500 tourism jobs could be supported by 2050 in the North.

Manchester Airport meets social needs and community interests by connecting people across the North to relatives, leisure destinations and opportunities abroad. Direct connections for immigrants to visit friends and family abroad can be an important asset for attracting talent from overseas for work and study.

The airport creates cultural exchange, opening up cultural dialogue and creating identity and cultural value for the North. Attracting more overseas

visitors will establish an international identity for the cities and sites of the North as a key destination to visit and do business.

By opening up new routes to destinations such as China and India, the airport will continue to connect families internationally and create new cultural and business links across the North, increasing the region’s attractiveness to global audiences as a place to invest, visit and study.

**The Opportunity to 2050**

Manchester Airport is a key international gateway to the North of England and provides direct access to major inbound tourism markets for the North, contributing significantly to the regional economy and cultural identity. Through support to open-up new routes to new destinations and future cities, Manchester Airport can continue to connect families internationally and create new cultural and business links across the North, increasing the region’s attractiveness to global audiences as a place to invest, visit, study and live.



**+38%**

Key international gateway, with 15,700 jobs supported by inbound leisure tourism in 2022, with a 38% increase in visits to Manchester between 2013-2018.

**38,500**

Opportunity to spread benefits wider and support an increase in visits across the North, increasing inbound leisure tourism jobs to 38,500 across the North in 2050.

**Action required to achieve transformational growth**



**Government should provide strategic route support to help open up new international routes, such as APD holidays for three years on long haul routes.**

The recovery of UK international connectivity after the pandemic has been slower than in other European countries, in part because of the disincentive of measures in the UK such as APD. The Government should consider the potential for short-term measures, such as APD holidays for new routes, to accelerate the growth of connectivity – increasing tax revenues in the longer term while also delivering the wider benefits of that connectivity for the North.



**Local Visitor Economy Partnerships should be given long term funding settlements with safeguarded funds to drive inbound tourism to regions in the North from key markets.**

Manchester Airport needs to increase the amount of inbound visitors, and working with partners such as tourism bodies and Local Visitor Economy Partnerships would allow it to build on their existing work. Safeguarded funding for those bodies would allow them to connect the North to equivalent economic and social clusters overseas, such as serving important business markets like India and North America and expanding to unserved tourism routes like Bangkok.



**The national tourism strategy should recognise the offer across the North and support the work of Local Visitor Economy Partnerships at the local level to increase inbound travel to the North.**

This will support in increasing the spread of tourism spend across cities in the North and places of interest.



# 5.

**Manchester Airport is a good partner, invested in working across organisations to realise the success of the North**

Through an inclusive ownership model, Manchester Airport’s success is tied to Greater Manchester’s success. The shared ownership and payment of dividends back to the Greater Manchester local authorities creates a mutual incentive to support local economic growth supported by international connectivity, tourism and trade. Working with organisations to realise the success of the North is also demonstrated through the airport’s commitment to achieve net zero operations by 2038 in line with Greater Manchester.

The airport drives social and economic change across the North through its partnerships with education and research institutions, and community groups. It supports in elevating the North and shaping the future leaders of the region by creating platforms, such as the Youth Forum, for a range of communities and demographics to engage with the airport and the industry.

Working alongside local businesses and business representative groups, Manchester Airport works closely to support businesses’ ambitions to trade internationally, attract tourists, and grow their markets. Today, MAG works with tourism bodies, universities, and businesses to reach a wide range of

communities and initiatives. The airport was one of the founding members of the Northern Powerhouse Partnership and is involved in a variety of initiatives working to grow a more prosperous, sustainable and inclusive North including the Jet Zero Council, North West Business Leadership Team, Manchester India Partnership and Manchester China Forum.

Manchester Airport can mobilise existing partnerships to connect and work with organisations across the North, creating a coalition of support and opportunities, to increase its influence and impact and realise the success of the North.

**The Opportunity to 2050**

Manchester Airport works alongside business, government and community partners locally and across the North to deliver on their mutual ambitions. Being a good partner, working in the spirit of collaboration and engagement, is critical to the success of the airport but also to businesses and communities. Manchester Airport could extend its partnerships, like the Manchester China Forum, to include more foreign partners and a wider base across the North. Through continued commitment to partnership and shared investment, Manchester Airport will work to achieve wider social and economic benefits for the North.



Manchester Airport supports local communities through engagement with businesses, schools, and community groups. The breadth of Manchester Airport expands across the North increasing its engagement reach and achieving wider social and economic benefits.

Action required to achieve transformational growth



**Manchester Airport should ensure local partners can benefit from the growth and capitalise on the opportunities from the airport.**

The airport should build on and mobilise existing partnerships with businesses, universities, and educational institutions across the North to reduce barriers to work and inspire the next generation into the aviation industry. However, greater certainty is required to develop a shared vision with stakeholders, communities and places and realise the transformational opportunity and impact over the longer term.



**Build on the success of place-based partnerships to support trade and international dialogue in priority markets.**

Initiatives such as the Manchester China Forum and Manchester India Partnership have successfully supported trade and international dialogue in priority markets. The airport and city regions across the North should repeat this approach with a focus on key unserved opportunities in Asia and North America, which would benefit from a joined-up approach that creates links between two city regions with growing industries of the future.



**Manchester Airport should continue and expand the positive engagement with community groups.**

Support from community partners and businesses to engage on a local, regional, and Northern scale, across a mix of demographics will open up opportunities to more people from a range of backgrounds. Through engaging with a wide mix of communities, Manchester Airport can ensure a high standard of diversity and inclusion in employment and supply chain opportunities to positively impact the North.

The contribution and success of Manchester Airport is interwoven with the economic performance of the North. The value of the airport to the local, regional, and national economy is significant, as set out in the following chapters. But it has the potential to contribute so much more if there is a wider economic transformation of the North.

The economic performance of the North lags behind the rest of the UK, with a structural and persistent performance gap largely accounted for by weak productivity. This is attributed to a range of factors, including: insufficient high-skilled workers and too many low-skilled workers; insufficient exploitation of innovation and technology; lower levels of investment; lower levels of enterprise; lack of agglomeration; sub-optimal transport links; and under investment in transport<sup>5</sup>. And because of these conditions, the North cannot achieve the level of international investment to catalyse economic transformation, particularly building on its prime capabilities across advanced manufacturing, digital, energy and health.

This chapter sets out potential scenarios for future growth and explores the contribution Manchester Airport could make under a transformational growth scenario for the North.

What would a Transformational Scenario look like for the North?

Arup and York Aviation have modelled what transformational growth could look like for the North and Manchester Airport, building on the growth scenarios set out in the *Economic Scenarios for the Northern Powerhouse Independent Economic Review* (NPIER), published by Transport for the North (TfN) in 2023<sup>6</sup>. The TfN report (March 2023) models the outcomes of six economic scenarios developed with partners across the North: business as usual (baseline), four change scenarios and a new **transformational vision** of the North’s economy by 2050, to establish a new economic ambition for the North. The work builds on the NPIER analysis undertaken in 2016. Appendix 1 sets out the scenario modelling methodology.

The transformational scenario adopted (TfN, March 2023) is shown in the table below and compared with the baseline forecast. The baseline projection considers the likely trajectory of the North’s economy in a “policy-off” context to 2050 and can best be described as a ‘business as usual’ scenario as set out in the original NPIER.

TfN’s transformational growth scenario is forecast to generate **£118 billion of additional GVA growth by 2050**, compared with the baseline.

Headline Metric	The North by 2050	Change relative to today (2021-2050)	Change relative to the Baseline Benchmark (by 2050)	% difference from the Baseline
Population (000’s)	18,653	+3,078	+1,657	+9.8%
Jobs (000’s)	9,261	+1,554	+1,003	+12.2%
GVA (£2019, billions)	633	+267	+118	+22.9%
GVA per job (£2019, 000’s)	68.3	+20.9	+6.0	+9.6%
GVA per capita (£2019, 000’s)	33.9	+10.4	+3.6	+11.9%

Headline economic metrics for the North in 2050: Transformational Scenario vs Baseline

Source: Economic scenarios for the Northern Powerhouse Independent Economic Review – Final Report (March 2023)

<sup>5</sup> Northern Powerhouse Independent Economic Review – Core Messages (2016): <https://www.n8research.org.uk/view/5814/Overview-NP-Independent-Economic-Review.pdf>

<sup>6</sup> Economic scenarios for the Northern Powerhouse Independent Economic Review – Final Report (March 2023), Transport for the North. Accessed online August 2023: <https://transportforthenorth.com/reports/economic-scenarios-for-the-northern-powerhouse-independent-economic-review/>



A **Transformational Scenario** would see the North closing its productivity gap and would be characterised by:

*Technology and innovation*  
The North benefits from high levels of technology adoption and investment;

*Inclusive productivity*  
The North benefits from high levels of economic participation at good rates of pay and with good opportunities for in-work progression, re-skilling and inter-generational mobility;

*Development supply*  
The North retains and attracts more working age people and people are better able to access a wide range of economic opportunities within a reasonable distance from home; and

*Net zero*  
The North drives progress towards meeting the UK’s net zero target with public investment increased and greater certainty created for the market.

Transformational growth will only be achieved through investment in the North’s transport infrastructure, alongside additional investment in areas such as skills, supporting innovation, engaging communities and prompting cultural connections. The transformational growth scenario would see the North sustain economic growth and social benefits, steadily closing the current gap with the rest of the country over the next 25+ years.

Adopting the assumptions set out in the TfN report (March 2023), Arup and York Aviation have modelled four scenarios to explore the potential scale of Manchester Airport’s impact in 2050. No changes have been made to the TfN scenario work and it has been adopted as best available evidence at this time (October 2023), to explore the potential scale of growth that could be achieved for the North and the dependent contribution that Manchester Airport could make to this.



## Future Scenarios for Manchester Airport

Scenario analysis demonstrates the potential scale of impact of Manchester Airport in 2050 under different illustrative futures which are determined by alternate economic growth, policy and investment environments.

The Transformational Scenario for the North has been used to inform scenario development for Manchester Airport, exploring different futures for the airport.

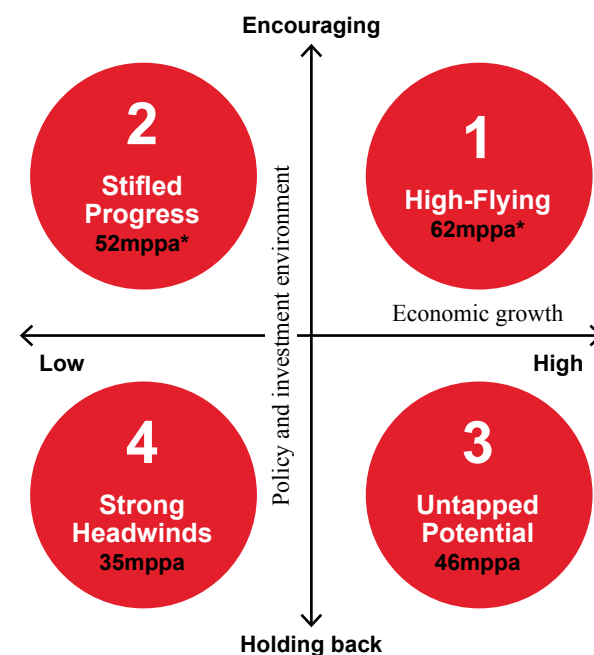
Four scenarios set out different potential futures for the North and Manchester Airport's role within it.

They follow two key axes:

- Performance of the North and national economies (from low growth to high growth), and
- Level of support of the policy and investment environment (from 'holding back' to 'encouraging').

The Manchester Airport economic scenario modelling has been undertaken for Arup by York Aviation – a specialist firm of transport consultants that has previously provided economic impact assessments for Manchester Airport.

The following sections set out each of the scenarios in turn and potential outcomes under each.



**Manchester Airport Future Scenarios**

\*MPPA - Million Passengers Per Annum





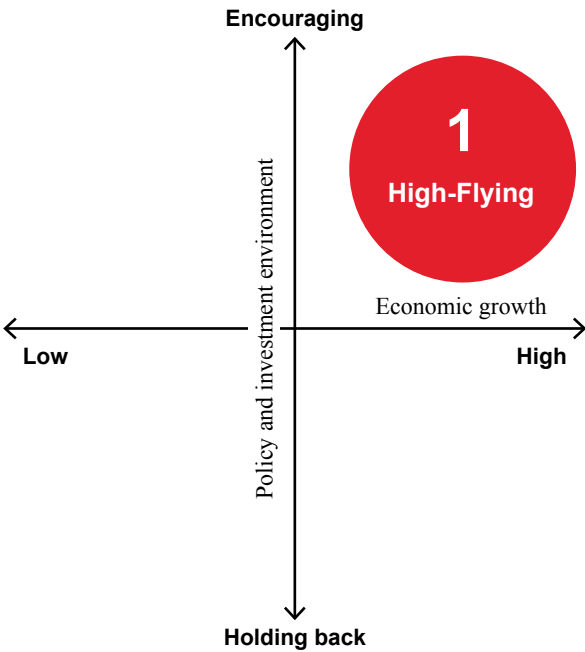
# Scenario 1 High Flying

Encouraging policy and investment environment, high economic growth

The North sustains transformational economic growth and social benefits, closing the gap with the South East and the rest of the country, and Manchester Airport leads the way in sustainable aviation as the UK’s Global Gateway in the North.

This scenario demonstrates that with the right investment, policy and collaboration, Manchester Airport will be a key driver for transformational growth for the North. This can only be achieved through investment in the North’s transport infrastructure, alongside investment in areas such as skills, research & development and innovation. It would also need the airport to ensure that future growth was delivered in a sustainable way, including a full transition to net zero aviation by 2050.

This scenario would see a positive feedback loop; wider investments and supportive policy would benefit the airport and allow it to make a greater, relative contribution to the economy (both national and the North), while a higher performing economy will attract greater inward investment, with the airport as a key asset and attractor, contributing to a more sustainable and productive economy going forward. The economy of the North would be characterised by higher productivity and greater levels of private investment, becoming less reliant on public finance and investment to support economic growth. The significant growth in the economy by 2050 will also result in people having a higher propensity to travel and therefore increasing spending power back into the economy.



Headline Metric	Manchester Airport Contribution in 2050 - National	Manchester Airport Contribution in 2050 – North
Total GVA (£, billions)	18.9	16.3
Jobs (on-site)		26,900
Jobs (direct – off-site, indirect, induced and inbound tourism)	128,900	109,200
Jobs (productivity)	37,500	31,200
Passengers (millions)		62
New routes (short haul / long haul)		24 / 54
Connectivity to GaWC Cities (Alpha / Beta*)		24 / 23

Notes  
\*Globalisation and World Cities Research Network (GawC). Alpha level cities are those that are very important world cities that link major economic regions and states into the world economy. Beta level cities are important world cities that are instrumental in linking their region or state into the world economy. GaWC also classify Gamma level cities which are world cities linking smaller regions or states into the world economy, or important world cities whose major global capacity is not in advanced producer services.

High Flying Scenario Summary:  
Manchester Airport’s contribution in 2050

Under this High-Flying Scenario

- There is significant investment in the North’s transport infrastructure, including delivery of NPR.
- More of the North is connected to Manchester Airport through NPR (within a 2 hour travel catchment), effectively increasing the catchment of the airport.
- New routes to cities around the world open up, facilitating more tourism and social connections, both into the North and from the North abroad. This includes increased connectivity to ‘Alpha’ and ‘Beta’ cities, such as Shanghai, Montreal, and Miami, under the Globalisation and World Cities (GaWC) classifications.
- New routes support businesses across the North to trade, export, attract investment, and innovate, including attracting more students and researchers to universities in the North.
- Investment in sustainability, including sustainable aviation fuels (SAFs), has helped the North lead the way in achieving net zero aviation, created jobs in sustainable energy and contributed to wider environmental objectives.

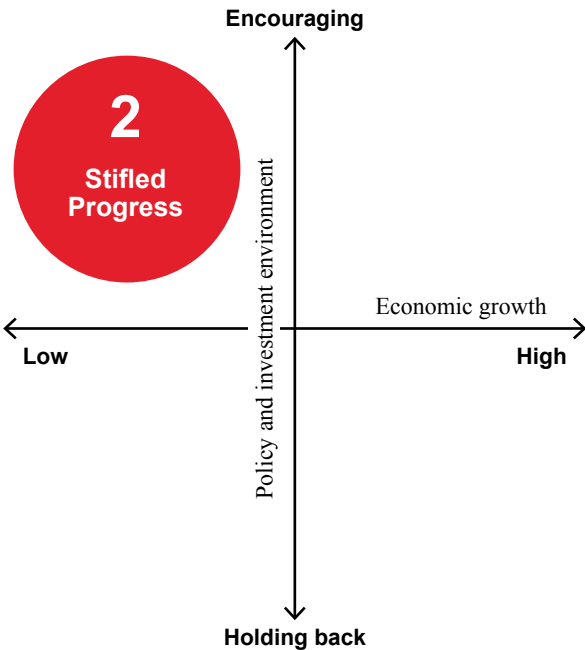
- The growth of Manchester Airport and greater connectivity create more job and supply chain opportunities across the North, with growth in induced jobs and GVA.
- The reputation and identity of the North has gained standing on the national and international stage as new routes open cultural, leisure, sport and art attractions and events to a wider global audience and attract more investment.
- Manchester Airport acts as a collaborator with education and training institutions to support skills and employment at the airport, and they work with community organisations to deliver social value across the North

# Scenario 2

## Stifled Progress

**Encouraging policy and investment environment, low economic growth**

Economic and social rebalancing makes slower progress, as investment opportunities are constrained by persistently lower productivity in the North. However, Manchester Airport adapts to conditions and makes the most of the opportunities for the North, supported by a positive policy environment.



- Under the Stifled Progress Scenario**
- Slower progress is made in closing the gap between the North and the rest of the country, although the supportive policy and investment environment ensures that the gap does not widen, and the North is able to build on prime capabilities such as advanced manufacturing, digital, energy and health.
  - The North increases its GVA contribution, but the pace of change is slower and at times stifled by economic growth, although the supportive policy environment gives reassurance and certainty to key investors.
  - Slower demand growth from businesses and growth of low-cost carriers means international connections are closer to home (supporting more tourism and business travel to Europe, for example). Businesses and residents across the North rely on Heathrow for connectivity further afield, adding cost and time
  - Supportive investment in SAF and supportive aviation policy encourages investment in more sustainable aviation, but lower demand represents foregone opportunities.
  - Inbound tourism and business travel could help bolster growth in the North, but the viability of new routes and the struggling economy act as a barrier.

Headline Metric	Manchester Airport Contribution in 2050 - National	Manchester Airport Contribution in 2050 – North
Total GVA (£, billions) – National value	16.3	14.0
Jobs (on-site)		24,400
Jobs (direct – off-site, indirect, induced and inbound tourism)	111,000	94,000
Jobs (productivity)	32,900	27,100
Passengers (millions)		52
New routes (short haul / long haul)		17 / 41
Connectivity to GaWC Cities (Alpha / Beta)*		21 / 18

Notes

\* Globalisation and World Cities Research Network (GawC). Alpha level cities are those that are very important world cities that link major economic regions and states into the world economy. Beta level cities are important world cities that are instrumental in linking their region or state into the world economy. GaWC also classify Gamma level cities which are world cities linking smaller regions or states into the world economy, or important world cities whose major global capacity is not in advanced producer services.

**Stifled Progress Scenario Summary:**  
Manchester Airport’s contribution in 2050





# Scenario 3

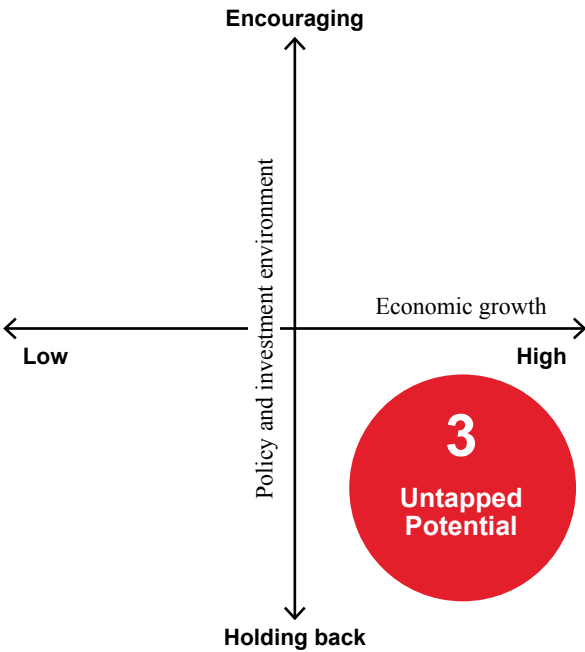
## Untapped Potential

### Constrained policy and investment environment, high economic growth

While the national economy is growing, the North misses out on opportunities. Manchester Airport misses out on important routes that would contribute to business growth and trade in the North, and it lacks investment in sustainability.

### Under the Untapped Potential scenario

- Key infrastructure investment is not delivered, including HS2 and NPR.
- The gap between the North and the rest of the country widens, with an unsupportive policy environment. Without the delivery of HS2 and NPR, as well as a strong agenda for investment in the North, foreign businesses, visitors and tourists naturally gravitate towards the traditional opportunities around London (or even look elsewhere across Europe).
- Manchester Airport has more influence over what is within its direct control or sphere of influence – direct jobs and training opportunities at the airport, investment in airport infrastructure and facilities, and community engagement and programmes—compared with the impact it could have under a more supportive policy environment.



Headline Metric	Manchester Airport Contribution in 2050 - National	Manchester Airport Contribution in 2050 – North
Total GVA (£, billions)	14.2	12.2
Jobs (on-site)		22,200
Jobs (direct – off-site, indirect, induced and inbound tourism)	95,900	81,200
Jobs (productivity)	28,900	23,700
Passengers		46
New routes (short haul / long haul)		17 / 41
Connectivity to GaWC Cities (Alpha / Beta)*		21 / 18

Notes  
\*\* Globalisation and World Cities Research Network (GawC). Alpha level cities are those that are very important world cities that link major economic regions and states into the world economy. Beta level cities are important world cities that are instrumental in linking their region or state into the world economy. GaWC also classify Gamma level cities which are world cities linking smaller regions or states into the world economy, or important world cities whose major global capacity is not in advanced producer services.

### Untapped Potential Scenario Summary

Manchester Airport’s contribution in 2050



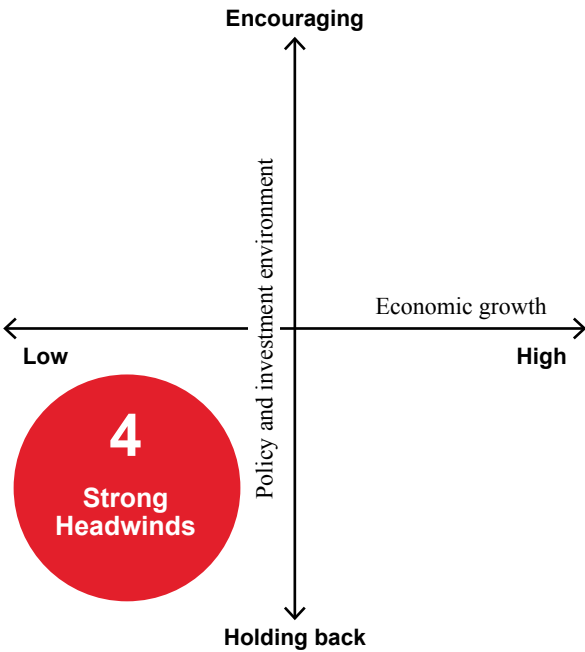
Scenario 4  
Strong Headwinds

Constrained policy and investment environment, low economic growth

The North and Manchester Airport are constrained by the economic and policy environment. This restricts the airport’s ability to drive sustainability and holds back its ability to drive growth and investment.

Under the Strong Headwinds Scenario

- Without investment in NPR and HS2, as well as road and public transport connectivity, Manchester Airport’s catchment grows, but it cannot keep pace with competitor airports, including London and European airports.
- Some new international routes open, supported by the airport’s transformational investment in new terminal infrastructure, but the airport’s reach and demand due to slower economic growth stymie route development.
- Businesses continue on a more ‘business as usual’ approach, with a more focussed approach to developing relationships for trade and investment, missing out on opportunities across the Middle East, Asia and North America in particular.
- While the airport meets its 2038 net zero operations commitment, without cooperation and investment in SAFs, the aviation industry finds 2050 more challenging to meet.



Headline Metric	Manchester Airport Contribution in 2050 - National	Manchester Airport Contribution in 2050 – North
Total GVA (£, billions) – National value	11.0	9.4
Jobs (on-site)		18,800
Jobs (direct – off-site, indirect and induced)*	73,500	62,300
Jobs (productivity)	23,100	18,600
Passengers		35
New routes (short haul / long haul)		8 / 26
Connectivity to GaWC Cities (Alpha / Beta)**		18 / 9

Notes  
\*\* Globalisation and World Cities Research Network (GawC). Alpha level cities are those that are very important world cities that link major economic regions and states into the world economy. Beta level cities are important world cities that are instrumental in linking their region or state into the world economy. GaWC also classify Gamma level cities which are world cities linking smaller regions or states into the world economy, or important world cities whose major global capacity is not in advanced producer services.

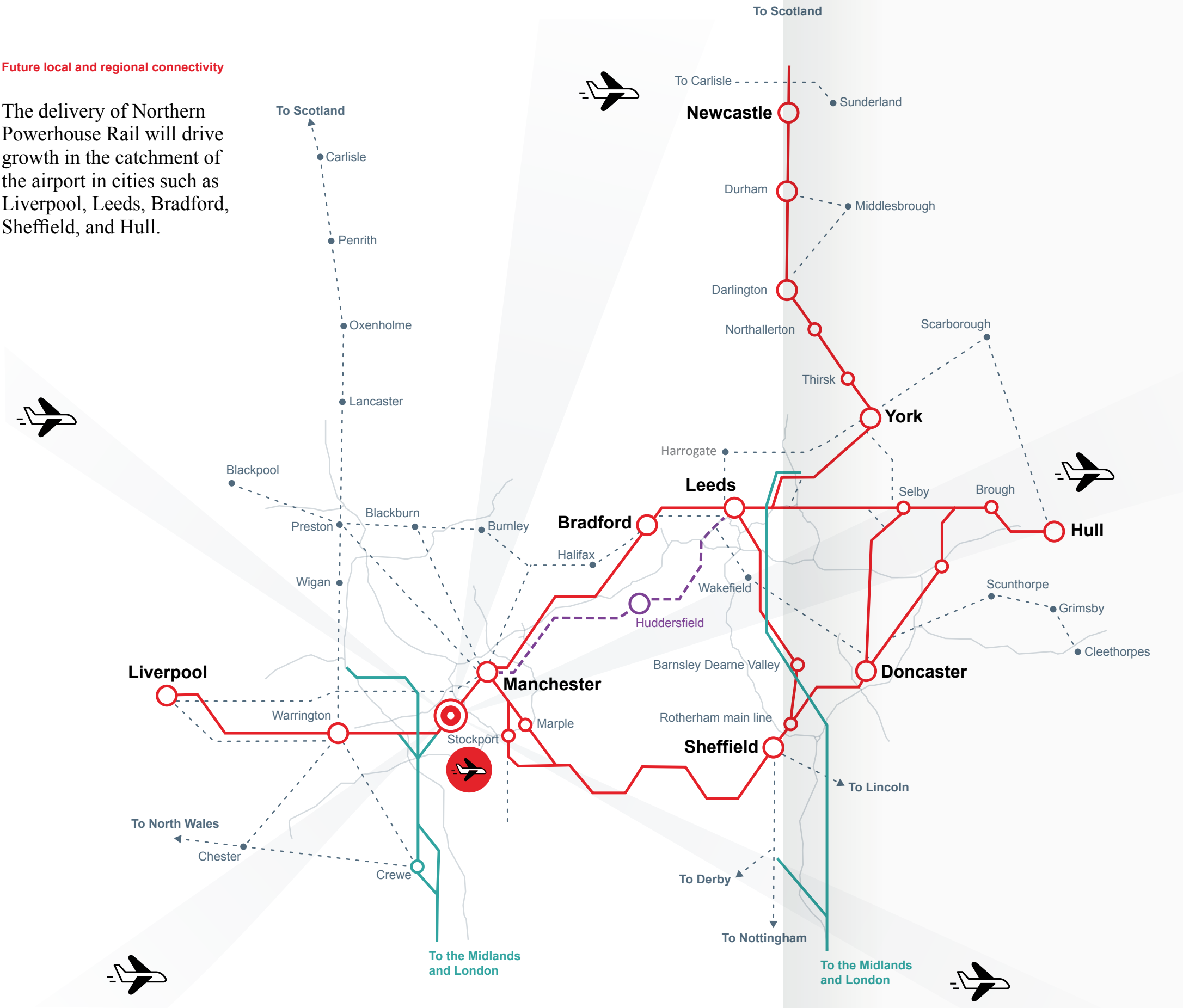
Strong Headwinds Scenario Summary  
Manchester Airport’s contribution in 2050





Future local and regional connectivity

The delivery of Northern Powerhouse Rail will drive growth in the catchment of the airport in cities such as Liverpool, Leeds, Bradford, Sheffield, and Hull.



In relation to the NPR, HS2 and TRU

- Time by rail to Manchester Airport Station from Newcastle**
- 2022 Baseline\* – 2hr 59 mins
  - TRU and HS2 – 2hr 43 mins
  - NPR (as assumed by TfN) – 2hr 10 mins

- Time by rail to Manchester Airport Station from Bradford**
- 2022 Baseline\* – 1hr 35 mins
  - TRU and HS2 – 1hr 35 mins
  - NPR (as assumed by TfN) - 38 mins

- Time by rail to Manchester Airport Station from Liverpool**
- 2022 Baseline\* – 1hr 12 mins
  - TRU and HS2 – 1hr 7 mins
  - NPR (as assumed by TfN) – 30 mins

In relation to the Northern Powerhouse Rail Lines

NPR could treble the number of businesses able to access the airport within a 90-minute rail catchment area from 70,000 to 260,000.

NPR (as assumed by TfN), TRU and HS2 will increase the 2-hour rail catchment area of Manchester Airport to 10.5 million people (using a 15-minute connection time) and 17.8 million people (using a shorter 5-minute interchange).

- Manchester Airport
- HS2 Manchester Airport station
- Northern Powerhouse Rail Lines
- HS2 Line
- Transpennine Route Upgrade
- Existing Network

## Scenario Comparison

With the right investment, policy and collaboration, the analysis undertaken demonstrates how Manchester Airport can be a key driver of transformational growth for the North. TfN’s transformational growth scenario is forecast to generate **£118 billion of additional GVA growth by 2050**, compared with the baseline scenario.

At the same time, **Manchester Airport could increase its national economic contribution from £6.6 billion in 2022 to £18.9 billion by 2050** – an increase of £8 billion compared to a baseline scenario. Combining these findings highlights the significance of Manchester Airport as a potential driver of economic growth in the North, with a potential contribution of just under **3% of the North’s GVA by 2050**.

### In summary

- The difference between the highest and lowest performing cases for Manchester Airport, at a national GVA level, is just under £8 billion. This is the difference between a national GVA value of £18.9 billion in 2050 for Scenario 1 (High Flying) and a national GVA value of £11.0 billion for Scenario 4 (Strong Headwinds). This difference is greater than the current GVA contribution of the airport to the UK economy, estimated at £6.6 billion in 2022.
- This difference of £8 billion represents almost 7% of the additional GVA forecast for the national economy under the transformational growth scenario.
- The difference between the highest and lowest performing cases for Manchester Airport, at the North level, is £6.9 billion, which again represents more than the current GVA contribution of the airport to the UK economy (£6.6 billion in 2022).
- Under Scenario 4 (Strong Headwinds), jobs growth (on-site) to 2050 is modest at under 10%, while under Scenario 1 (High Flying) direct on-site jobs increase by over 50%.
- The High Flying scenario sees the airport grow to more than 60 million passengers and raise its profile and competitiveness as a major European airport. Under Scenario 4 (Strong Headwinds), passenger growth is still achieved but it is not transformational and more in line with business-as-usual growth and building on existing services.
- Under a High Flying scenario, there is a step change in connectivity, with Manchester Airport becoming a bigger global gateway with access to new and growing markets, with direct connections to some of the most prolific GaWC cities.

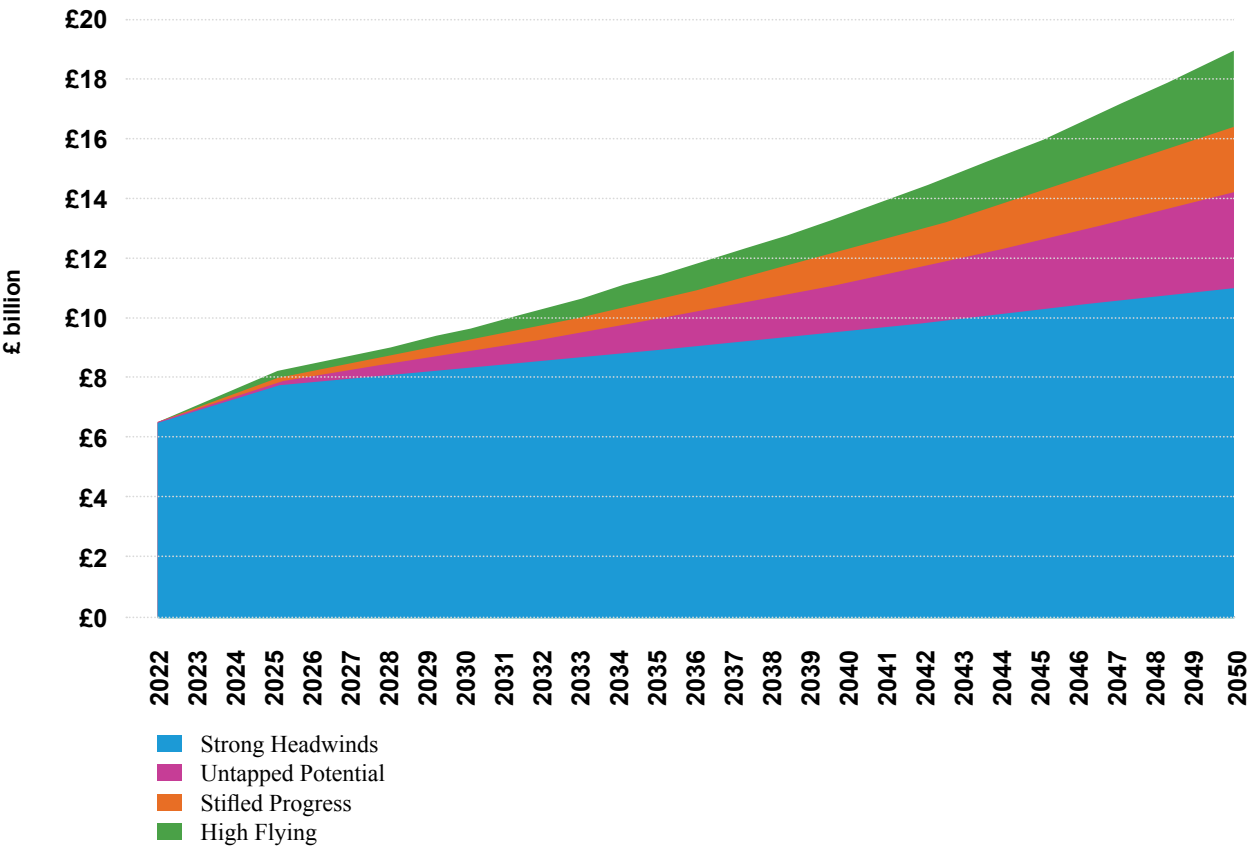




The chart shows the projected national GVA contribution of Manchester Airport for the four scenarios analysed. The projections show that, although differences may appear relatively insignificant in the short term, the cumulative impacts of a less supportive policy and investment environment build over time, resulting in a significant underperformance.

In the short term, the amplifying effect of a supportive policy and investment environment is less pronounced: the spread in GVA between the four scenarios is only £600m-£900m in 2030. However, over time the cumulative effects of this

underperformance become significant. By 2050, the scenarios have diverged and the potential opportunity has become stark. More positive government policies and economic conditions lead to to annual GVA in the most positive scenario of nearly £19bn by 2050, which is almost £8bn (73%) higher than the Strong Headwinds scenario.



National GVA Contribution of Manchester Airport in 2050

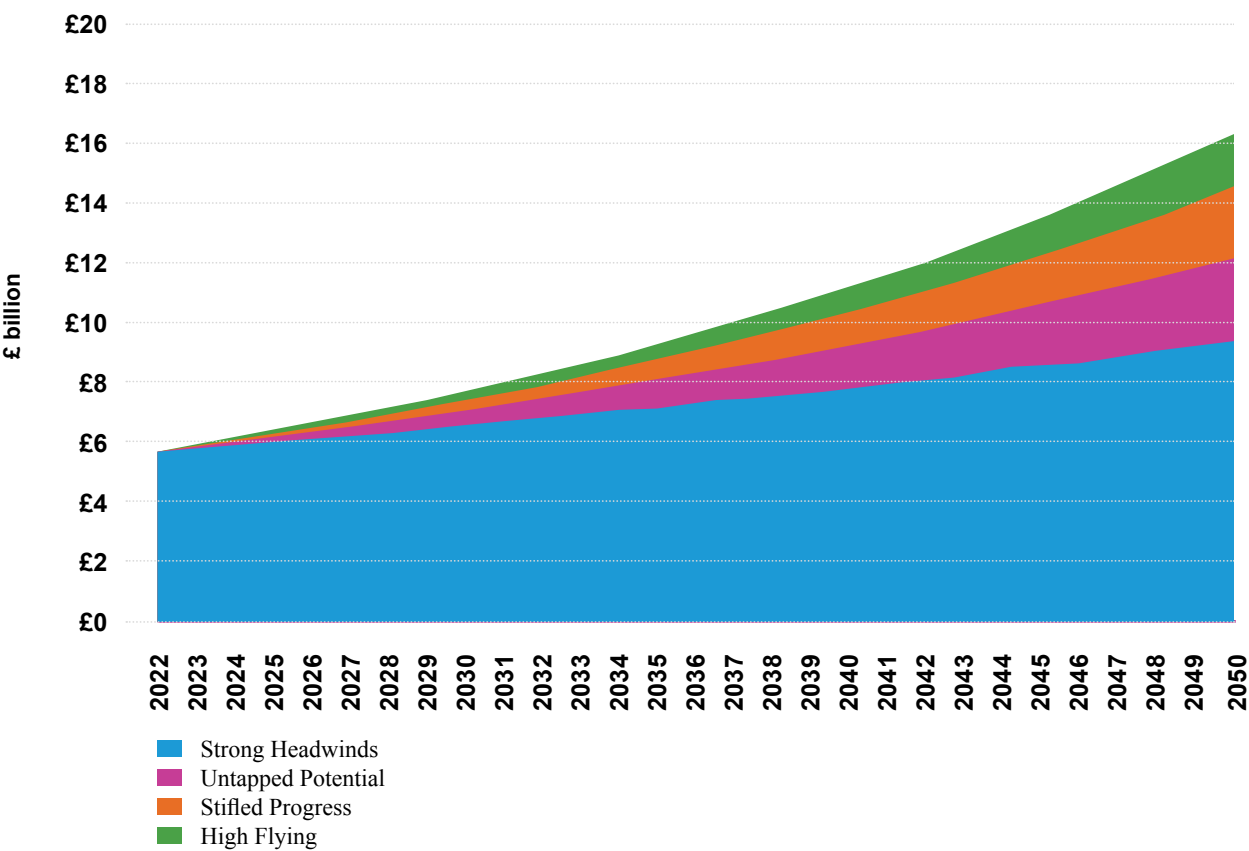
Headline Metric	2022	Scenario 1 High Flying	Scenario 2 Stifled Progress	Scenario 3 Untapped Potential	Scenario 4 Strong Headwinds
Total GVA (£, billions)	£6.6	£18.9	£16.3	£14.2	£11.0
Jobs (on-site)	17,300	26,900	24,400	22,200	18,800
Jobs (direct – off-site, indirect, induced and inbound tourism)	60,500	128,900	111,000	95,900	73,500
Jobs (productivity)	16,100	37,500	32,900	28,900	23,100
Passengers (mppa)	23	62	52	46	35
New routes (short haul / long haul)	-	24 / 54	17 / 41	17 / 41	8 / 26
Connectivity to GaWC Cities (Alpha / Beta)	-	24 / 23	21 / 18	21 / 18	18 / 9

Scenario Summary – National Contribution

The chart shows the same but for the GVA contribution of Manchester Airport to the North.

The future economic prosperity of the North is dependent on breaking a cycle of underinvestment. The report demonstrates how investment can create a positive, virtuous cycle that supports businesses, growth, and further inward investment for the North. Increased investment will unlock further opportunities and economic growth, shifting the North towards a transformational growth scenario. Without this investment, businesses will lack

the confidence, innovation, and connections to grow, creating a vicious cycle which will see the North's performance gap persisting and a continued imbalance in economic and social outcomes for the North.



GVA Contribution of Manchester Airport to the North in 2050

Headline Metric	2022	Scenario 1 High Flying	Scenario 2 Stifled Progress	Scenario 3 Untapped Potential	Scenario 4 Strong Headwinds
Total GVA (£, billions)	£5.7	£16.3	£14.0	£12.2	£9.4
Jobs (on-site)	17,300	26,900	24,400	22,200	18,800
Jobs (direct – off-site, indirect, induced and inbound tourism)	51,800	109,200	94,000	81,200	62,300
Jobs (productivity)	13,000	31,200	27,100	23,700	18,600
Passengers (mppa)	23	62	52	46	35
New routes (short haul / long haul)	-	24 / 54	17 / 41	17 / 41	8 / 26
Connectivity to GaWC Cities (Alpha / Beta)	-	24 / 23	21 / 18	21 / 18	18 / 9

Scenario Summary – North Contribution



# Economic Opportunities

## Section 3



Job and Skills

Manchester Airport is a key employer for the North supporting 20,200 jobs and generating total employment impacts<sup>8</sup> of 80,700 jobs across the North. Looking forward, with the right investment in transport and the skills needed for the future aviation industry, the airport could expand total wider employment impacts to over 165,000 people, covering a wide range of skills to support productive and quality jobs across the North.

Future Investment and Growth Priorities

In a future transformational scenario, with high economic growth and a positive and supportive investment and policy environment, the airport could support **31,400 direct on-site and off-site jobs<sup>9</sup>** and **generate £16.3 billion GVA across the North in 2050**, nearly tripling its impact between 2022 to 2050. The **total employment impacts in the North could rise to 165,100 jobs in 2050—equivalent to the population of Harrogate**.

Through road and rail investment, more communities and businesses can access the airport and pursue a meaningful career in aviation. Through growth of future sectors and skills in the industry, more jobs will be created across a wide range of areas. From pilots to engineers for sustainable aviation to security officers, there will be opportunities for everyone.

<sup>8</sup> Total employment impacts refers to direct on-site, direct off-site, indirect, induced, productivity – passenger, productivity – freight, inbound tourism jobs.  
<sup>9</sup> Direct On-site and Direct Off-site.



To achieve transformational growth, the following priorities need to be delivered

- 2** Deliver high-speed rail links to provide critical connectivity and unlock growth across the North.
- 10** Greater access to and investment in education and training programmes to support the aviation industry.
- 11** Allow more flexibility with the Apprenticeship Levy to enable funding to be spent where needed the most, including lifelong learning.





How Manchester Airport contributes to the North today

The North is a strong economic region with ambition for growth, but it lags behind other parts of the country on social and economic indicators. The North is investing in driving productivity growth, and Manchester Airport contributes to shaping and strengthening the region’s economy by offering global reach to international opportunities. Manchester Airport generates economic benefits that are distributed across the North, with **20,200<sup>10</sup>** people working at the airport and generating a total of **£5.7 billion in GVA** across the North in 2022.

The aviation industry creates quality jobs, and Manchester Airport is part of one of the **largest aviation and aerospace clusters in the UK**, attracting high growth companies to the North. Employment at the airport spans multiple industries, enabling **jobs for everyone** across different skill levels and all stages of the education and work life cycle in an economically and socially impactful way.

**Manchester Airport works in partnership** with local stakeholders to enable access to employment and training opportunities for people across the North. The airport plays a critical role in ensuring the local workforce is equipped with the skills required by businesses in the future, **supporting the growth of a diverse range of future skills in the North, such as STEM skills** (including sustainability roles). These programmes support in raising awareness of career opportunities within the industry, **removing barriers to work and inspiring young people** across the North.

- In 2021/22 the Manchester Airport Academy, delivered in partnership with Trafford College, directly supported over 2,300 people through free accredited courses and made around 4,150 job referrals within the airport.
- Launched in 2023, a two-year apprenticeship scheme delivered in partnership with Trafford College, is providing a 3-year aviation programme for up to 30 apprentices.
- The graduate scheme focuses on unlocking development and progression in all areas across the airport, through a rotational programme.

- The Aerozone is a state of the art interactive education centre to provide support to young people (4-18) from the local community on careers in aviation. It hosted 2,600 young people in the last year and has a waiting list of over 150 schools.
- Manchester Airport is working with the Greater Manchester Chamber of Commerce and local education providers to plan for the skills of the future, investing in supporting the growth of STEM roles, and launched a Sustainable Aviation Fuel Curriculum in October 2023.
- The partnership between Manchester Airport and Pure Innovations supports neurodiverse people into internships and longer-term employment. In 2022, six young people graduated from the supported internship programme.

**Manchester Airport supports an equal and diverse workforce.** It is an attractive and welcoming place to work and unlocks opportunities that are accessible for all communities across the North. The airport is committed to supporting women in leadership, with 46% female representation on the MAG Board of Directors, and recruiting and training more inclusively. MAG’s **Equity, Diversity & Inclusion Strategy** sets out key goals to achieve 50% women in leadership, 12% ethnic diversity in leadership, and 12% representation of 16-25s across colleague levels by 2025.

<sup>10</sup> Direct On-site and Direct Off-site.

20,200

People work at Manchester Airport today.

£5.7bn

In GVA generated across the North in 2022.

2,300

Number of people supported through accredited courses covering aviation (2021/22).

50%

Women in leadership target.

“I was excited to earn a place on the MAG graduate programme in 2012. I always had a passion for the aviation industry and wanted to live and work in Manchester. The MAG graduate scheme was one of the very few opportunities available in the North which allowed me to achieve my ambition. The MAG graduate scheme was the perfect opportunity, combining location and interest in aviation.

Prior to working at MAG, I held two part time summer jobs at Manchester Airport working for ground handling companies whilst also studying Management and Transport Studies at the University of Leeds. During my time on the rotational graduate scheme, I gained invaluable experience in airport operations, marketing, and asset management. The different placements were influential in my success and opened a wide network of contacts and a broad understanding into how the organisation works. I was also offered the opportunity to gain further education and sponsored to do a master’s in management at the University of Manchester. Both of my degrees have really helped me in my role.

After completing the graduate scheme, I entered a permanent role in marketing before transitioning to commercial roles. In the past three years, before progressing to Head of Business Development and Onward Channels at CAVU\*, I held other positions including Manchester Airport Commercial Manager and General Manager of the Runway Visitor Park.

Working for MAG has enabled me to combine my university learning and a passion for the industry and to be part of a large innovative company that is able to drive change. MAG has helped me do something I love. There are so many career paths open to people at the airport and MAG is so keen to develop people – opportunities exist for all.”

Robert Hassard, CAVU Head of BD & Onward Channels

\* CAVU is an airport products and services provider founded by MAG.

## Business and Supply Chain

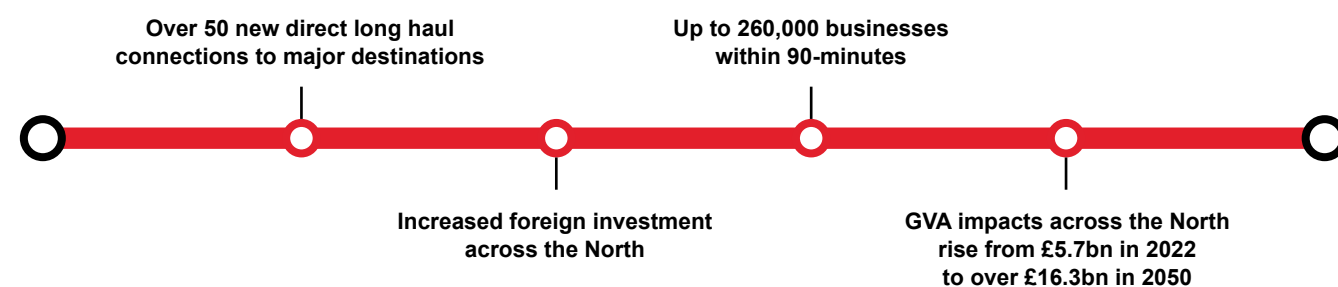
The North is a destination for international businesses and has key international links which, if strengthened, will help the region to realise its economic potential. Manchester Airport supports the business environment across the North to compete globally by acting as the UK's Global Gateway in the North and offering global business and supply chain reach to other major markets and world cities. Through support to expand routes, businesses across the North can maximise international opportunities in future sectors.

### Future Investment and Growth Priorities

Underpinned by a supportive investment and policy environment in a transformational scenario, the number of direct routes at Manchester Airport could increase to serve around 50 new Global and World Cities (GaWC alpha or beta)—cities which are instrumental to linking their region or state to the world economy—across South America, Canada, Australia, the US, China and India by 2050.

This paradigm shift in connectivity could increase international trade and investment across the North. It could open up new relationships between businesses, support air cargo trade for high-value manufacturing, technology and pharmaceuticals, and attract international tourists to high streets, events, and attractions. Manchester Airport has the potential to be the **superhub for the North**, underpinned by strategic regional road and rail connections, and strengthen the North's global business connectivity by facilitating direct access to international business destinations and leading innovation districts across the globe.

There is also an opportunity for freight forwarding businesses to build on services at Manchester Airport, developing new supply chain opportunities for people and businesses across the North.



To achieve transformational growth, the following priorities need to be delivered

- 1** Government should build certainty and confidence in the UK market to help attract international investment through committing to a long-term plan.
- 3** Investment in roads and public transport to become more convenient and affordable, enabling modal shift and reducing congestion and journey times across the whole of the North, to and from Manchester Airport.
- 4** Government and national policy should recognise Manchester Airport as a vital piece of infrastructure that supports the flow of inward investment.
- 7** Government should provide strategic route support to help open up new international routes, such as APD holidays for three years on long haul routes.





How Manchester Airport contributes to the North today

The North could become the **leading attractor of business and investment** in the UK outside of London. Although businesses in the North are innovative and productive, they lag behind the growth of the South. Through connections to Europe, long haul destinations and growth markets, Manchester Airport **supports businesses across the North to compete globally**. Manchester Airport allows international businesses to expand their footprint across the North by providing **reach to global markets** enabling businesses across the North to trade, innovate, exchange knowledge, and attract investment from abroad. Through working in partnership with MIDAS (the inward investment promotion agency for Greater Manchester), the airport promotes innovation and attracts inward investment through connecting with global businesses, investors, and institutions.’ This contributes to **spreading inward investment benefits across the region** in sectors supported by the aviation industry. With around 140 businesses on site, Manchester Airport supports a diverse mix of industries that are critical to the North and wider UK economy including advanced manufacturing, aerospace, financial and professional services, education, tourism and digital.

The connectivity facilitated by Manchester Airport strengthens the **transportation offer for business visitors** to the North. Manchester Airport has a wide influence on demand for business tourism, with strong propensity for business air travel clustered in Greater Manchester, contributing significantly to the Greater Manchester economy. Germany and

the USA are the top destinations for business travel from Manchester Airport. International connections and business travel allows for **knowledge sharing and access to internationally leading innovation districts globally**.

Manchester Airport plays an important freight role, underpinned by the road network around the airport which supports regional distribution. Manchester Airport is the second largest UK air route for exports to China. A total of 65,400 tonnes in trade passed through Manchester Airport in 2022— the equivalent to 246 Boeing 747-800 planes. The trade facilitated by Manchester Airport contributes to opening up **supply chain opportunities** throughout the aviation industry for local business across the North. Manchester Airport supports local suppliers across the North, with 37% of the airport’s supply chain located within a 25-mile radius of the site\*. The 2023 inaugural Meet the Buyers event generated more than £2.3 million for businesses across the North, through which **Manchester Airport connects businesses across the region** and promotes available opportunities for SMEs at the airport.

Why does international connectivity matter for the economy in the North?

A study for the UK Airports Commission used seat capacity as a proxy for air connectivity to estimate the impact of improved connectivity on the UK’s economy.

The study revealed that a 10% increase in seat capacity could improve:

- Short-term GDP by 1%.
- Tourism by 4% within the UK and 3% among UK tourists travelling abroad.
- Trade by 1.7% in terms of UK product imports and 3.3% in terms of UK product exports. UK service imports and exports would also improve by 6.6% and 2.5% respectively.
- FDI by 4.7% in terms of increased UK FDI inflows and by 1.9% in terms of increased UK FDI outflows.

Source: <https://www.pwc.com/gx/en/capital-projects-infrastructure/pdf/pwc-air-connectivity.pdf>

\* (2021/22 - note caveated figure due to impact of Covid-19)

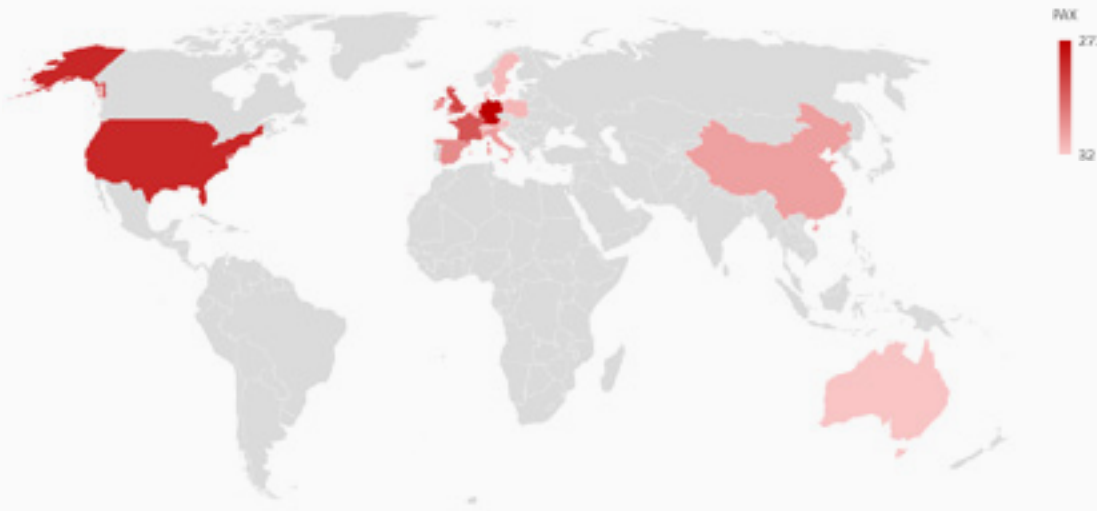
Dubai: Development of a superhub

The growth of Dubai from a small oil reliant economy, with dwindling supplies pre-2000, to one of the largest and fastest growing city state economies in the world in a little over 20 years is an extraordinary achievement. It has been done by harnessing a government driven thirst for connectivity and investment, allied to a geographic position at the crossroads between the eastern and western hemispheres. It has transformed Dubai into a trading, tourism and business centre, at the very heart of the world economy. It is a journey that has taken Dubai from, in GaWC terms, a Beta city in 2000, sitting alongside the likes of Cairo, Athens and Montreal, to an Alpha+ city in 2020, on a par with Singapore, Beijing, Paris and Tokyo.

Dubai International Airport has been at the heart of this change, going from a small national airport of 10 million passengers per annum in 1998, to the world’s busiest international airport in 2019, handling 86 million passengers in 2019. Over the same period, Emirates has become the world’s largest long-haul airline.

For Manchester Airport, the lesson is clear: international connectivity can be transformational. In an increasingly globalised world, where city regions are drivers of growth and prosperity, connectedness is key.

Top 20 destinations for business travel from Manchester Airport



140  
Businesses on site

1/3  
of the airport’s supply chain located within a 25-mile radius

65,400  
Tonnes of trade through the airport in 2022, equivalent to 246 Boeing 747-800 planes

Global  
Reach to key growth markets and business destinations

## Tourism

Manchester Airport is the UK's Global Gateway in the North of England and offers the greatest breadth of international connections in the North. The airport provides direct access to cities, events, and attractions across the North, allowing visitors to experience everything the North has to offer, supporting the economy and building cultural identity. With support to open up new routes to global cities, Manchester Airport can expand its connections for tourists to access the North and for the people who live there to access international destinations. This will create new cultural and business links across the North, increasing the region's attractiveness to global audiences as a place to visit, conduct business, and study.

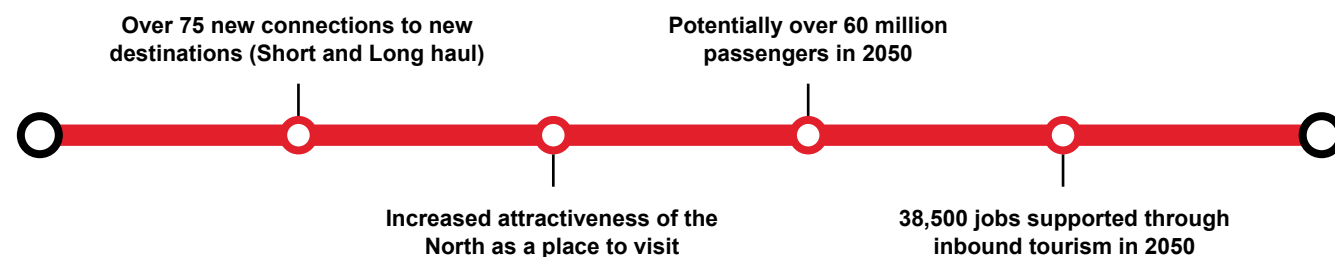
### Future Investment and Growth Priorities

In a transformational future scenario, where the international tourism industry is growing and policy is supportive, passenger numbers through Manchester Airport could increase to over 60 million by 2050 from 27 million today. Manchester Airport could expand connections to include new destinations which are currently unserved in places such as North America, the Middle East, East Asia, China and more. Expanding routes will strengthen the tourism industry and cultural diversity across the North, attracting more students to study in the North and connecting friends and families globally. Attracting more overseas visitors will establish an international identity for the cities and sites of the North as a key destination to visit and do business.

With investments in road and rail, tourists and students arriving in Manchester Airport will have better and broader access to the major cities, attractions and events in the North. This means more spending across a broader geography. Manchester Airport will increasingly be viewed as a key global entry point to the UK, building on its existing status as the UK airport closest to all four home nations' capital cities.

"Looking to 2050, we want to grow the number of tourists who come to Manchester and the North for business and holiday. Our key markets of expansion are United States, China, and India, focused on growing collaborative global operations to bring investment and growing businesses to the North."

Marketing Manchester



To achieve transformational growth, the following priorities need to be delivered

- 7** Government should provide strategic route support to help open up new international routes, such as APD holidays for three years on long haul routes.
- 8** Local Visitor Economy Partnerships should be given long term funding settlements with safeguarded funds to drive inbound tourism to regions in the North from key markets.
- 9** The national tourism strategy should recognise the offer across the North and support the work of Local Visitor Economy Partnerships at the local level to increase inbound travel to the North.





How Manchester Airport contributes to the North today

The North is a fusion of cultures, talent, and creativity, and Manchester Airport meets the social needs and community interests of the North by connecting people across the region to relatives, leisure destinations and opportunities abroad, opening up cultural dialogue and creating identity and cultural value for the North. The offering of the airport to international destinations reflects the rich culture and diversity of the North, building an international identity for the North as a key destination to visit and do business. There is a lot to offer in Manchester through two of the biggest football clubs, art galleries, state of the art venues like Factory International and the soon to be launched Co-Op Live, and since 2008 visits to Manchester have grown consistently, increasing 38% between 2013 and 2018, 22% ahead of the national average. There is a high volume of low-cost carriers at Manchester Airport which further supports student travel and short-term trips such as city breaks centred around leisure, sport, entertainment and visiting friends and relatives.

Strong tourism markets require international airports to act as global gateways. The North is full of national assets, and Manchester Airport increases the global reach of the North and widens the inbound tourism market by expanding its connections to international destinations. LVEPs work with the airport, businesses, universities and venues to bid for and attract international

conventions for the North. These conventions support the local economy through delegate spend and bring key industry leaders to the North to build relationships across different sectors. The success of Manchester Airport is critical to the success of places across the North:

- 15,700 jobs in the North are supported by inbound leisure tourism through the airport today.
- Of the passengers travelling through England’s 11 largest airports, Manchester Airport caters for 75% of the passengers originating in the North West.
- The Airport enables successful communities across the North by offering international access to tourist markets in places across the region from Liverpool, Lake District, and Leeds via direct and long-haul routes to key destinations.
- Through strong engagement ties with tourism bodies, Manchester Airport also plays a key role in supporting tourism businesses and the travel ecosystem across the North and beyond where the spending power of tourists travelling through Manchester Airport contributes to creating vibrant town centres and highstreets.
- Manchester Airport facilitates outbound tourism, enabling people across the North to access international destinations for leisure, business, and to connect with families and friends abroad.

15,700

Jobs supported by inbound leisure tourism in 2022.

£660m+

GVA spend impacts across the UK through tourism in 2022.

38%

Increase in visits to Manchester 2013-2018.

“Marketing Manchester and Manchester Airport have been partners for over 25 years, working side by side to open Greater Manchester up to increased international trade and investment, and to visitors that come here for leisure or business.

Crucially, the efforts of both Marketing Manchester and Manchester Airport overlap in the context of the Greater Manchester International Strategy which outlines how the region will connect with and lead in bringing new trade, foreign direct investment, research and innovation, and international students to the region as well as strengthening the international visitor economy through communication, connectivity, and political diplomacy.

In the context of the International Strategy, we work together to raise awareness of Greater Manchester’s tourism offer in key strategic markets such as the US, Middle East, and warm up new markets such as India. This work dovetails with initiatives to attract foreign direct investment through MIDAS (the inward investment promotion agency for Greater Manchester) and to recruit and retain the best and brightest students to our universities.

As the city-region’s Destination Marketing Organisation, responsible for the strategic positioning of Greater Manchester and the development of its promotional brand framework, Marketing Manchester leads the way in showcasing the destination in market – through high-profile marketing campaigns, year-round travel trade and press and PR engagement, and special events such as taking Manchester to market at MIPIM in Cannes, to SXSW in Austin, and supporting major diplomatic engagements in recent years to India, Ireland, the US, and Japan.

We are currently in the process of developing a 2024–2030 Greater Manchester Visitor Economy Strategy, which will aim to increase business and leisure-related tourism and will align with Manchester Airport in terms of key priority markets, and particularly within the US, China, and India, focused on growing collaborative global operations to bring investment and growing businesses to the North.”

Marketing Manchester  
Victoria Braddock (Strategic Partnerships and Marketing Director) and  
Louise Latham (Communications Director)

[www.marketingmanchester.com](http://www.marketingmanchester.com)

Innovation

Business and government leaders in the North are committed to creating more opportunities and investment for innovation to drive productivity growth in the region. However the North faces strong competition to attract innovative businesses and investment. As the UK’s Global Gateway in the North, Manchester Airport unlocks global connections to access new markets and facilitate knowledge sharing, strengthening its role in developing future innovations and attracting global talent and investment.

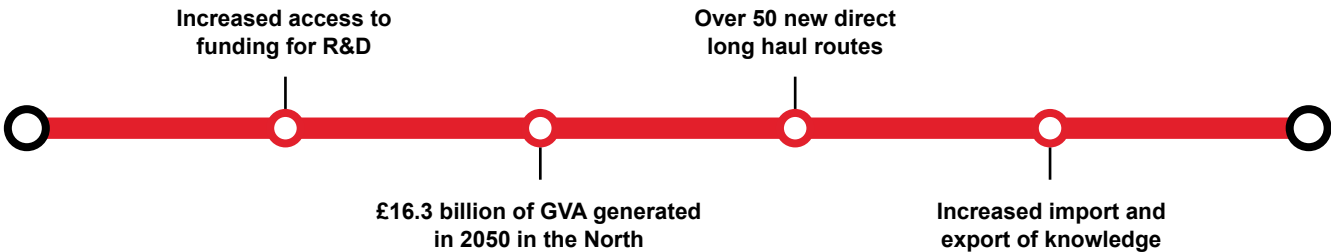
Future Investment and Growth Priorities

In a future transformational scenario, with high economic growth and a positive and supportive policy and investment environment, Manchester Airport could generate £16.3 billion of GVA in the North in 2050, demonstrating its role in increasing productivity across the North. It could also serve over 50 new direct long-haul routes by 2050, with 24 routes reaching Alpha cities (significant role in the international economy) and 23 routes reaching Beta cities (moderate international economic connection). This could include Chicago in the

United States (which was served pre-pandemic), Tokyo in Japan, and Shanghai in China.

For the North to realise its full potential, new routes to global destinations are required. Manchester Airport is the foundation for opening up businesses and institutions across the North to talent from around the world, and the North’s talent to engage with innovation abroad. New routes to more talent will support more investment in innovation, attract new ideas, and support the growth of knowledge-based sectors and clusters in the North.

Universities, research institutes and businesses rely on access to global talent to innovate. More direct access to world cities and their universities and innovation centres will help institutions in the North attract top talent for work, study and major conferences and events. In super innovative places, like San Francisco and Silicon Valley, people have a higher propensity to fly, because they attract international talent, host international conferences, and collaborate further afield. Route expansion at Manchester can underpin access to talent and ideas for businesses and institutes around the world, supporting growth of important clusters across the North.



To achieve transformational growth, the following priorities need to be delivered

- 1 Government should build certainty and confidence in the UK market to help attract international investment through committing to a long-term plan.
- 12 Ensure global talent can access universities and research institutions across the North.





How Manchester Airport contributes to the North today

The North is home to innovative, leading businesses that are delivering world class research and development, such as BAE, Amazon, AstraZeneca, Airbus, and Bentley. Manchester has a deep-rooted history of discovery and innovation. It is a leading digital tech city, a key destination for Foreign Direct Investment and has recently been voted as the UK’s most entrepreneurial city. Global companies have located their hubs in Greater Manchester - BNY Mellon, Squire Patton Boggs, and Max Fame, with MAG and MIDAS (Manchester’s Inward Investment Agency) recently signing an MOU with Nasscom to promote innovation, investment, and technological exchange between Greater Manchester, in the UK, and India through providing support to small Indian tech companies.

The North is also home to businesses that are export focused, compete in international markets, and partake in international supply chains, developing innovative products and services learning from the markets they operate in. Manchester Airport enables these businesses to compete globally, facilitating direct access to international business destinations and leading innovation districts across the globe.

Within the aviation industry, Manchester Airport is at the forefront in innovation and sustainability. CAVU, founded by MAG, is pioneering the use of innovative technology and revolutionising airport travel and ways of working within the aviation industry, directly benefitting the North through its products, services and innovation. The airport provides a foundation for a cluster in aerospace

across the North, aiming to become the first UK airport with a direct feed of Sustainable Aviation Fuel (SAF), supporting green jobs and investment in the North. SAF has the potential to support the UK economy with £930 million in GVA annually and 6,500 jobs by 2035. Manchester Airport can maximise opportunities in emerging technologies such as SAF to deliver green jobs and investment across the North.

Through its partnerships with universities, Manchester Airport’s international connections and business travel allows for knowledge sharing and access to internationally leading innovation districts globally. The airport contributes to the import and export of knowledge by connecting international students with universities across the North. This has been demonstrated by a 9% increase, over the two years since the route was launched, in Chinese students in Greater Manchester, compared to national growth of 4%. Through its Terminal 2 investment, there has been an increase in international connections to Europe, long haul destinations and growth markets, enabling businesses across the North to export, innovate, exchange knowledge, and attract investment from abroad.

*Through its investment in partnerships and emerging technologies, Manchester Airport is enabling the North to compete in the global market, strengthening the region’s role in leading innovations.*

9%

The number of Chinese students in Greater Manchester has grown 9% in two years vs national growth of 4% since the route launched

£5.7bn

GVA in operational and wider impacts across the North in 2022

San Francisco Bay Area: Building a High-Tech Cluster

San Francisco and the Bay Area has been the world’s number 1 tech cluster for over 40 years. It is home to many of the world’s largest tech companies, such as Apple, Google, Intel, Salesforce, and Tesla.

Its success has been built on a combination of factors, notably

- the eco-system of innovative companies and internationally renowned academic institutions, such as Stanford, UC Berkeley, Caltech and UCLA;
- advantageous tax breaks for tech companies;
- a thriving SME community and a youthful population;
- the digital infrastructure and business services community to support development.

It is also a highly connected region

- San Francisco Airport handled around 58 million passengers in 2019, while the region’s secondary airports handled another 29 million. A propensity to fly of 9.0 passengers per million of population, compared to 2.8 for the North of England. It has direct access to 30 GaWC Alpha destinations, which is 36% more than the North of England today.

The North is a nascent tech cluster and has aspirations as regards to other high growth, high value added sectors. It has many of the key features described above, including strong academic institutions, a young population and dynamic SME community. To make the most of these major skills and business assets, the North needs greater international connectivity to other innovative cities and clusters through Manchester Airport.





# Connectivity Opportunities

## Section 4





International Connectivity

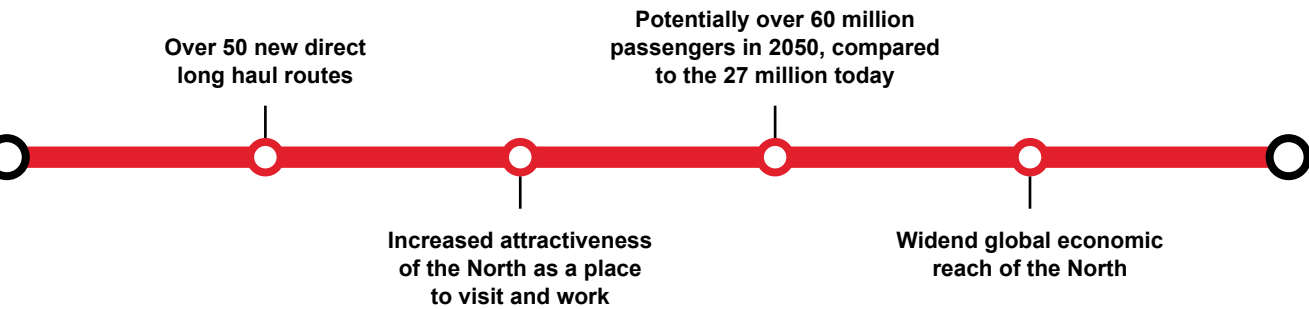
Manchester Airport is the long-haul hub for the North providing international connectivity, supporting tourism, culture, investment, jobs and knowledge exchange. By increasing connections to destinations of the future, Manchester Airport will bring businesses and communities across the North closer to international opportunities. This will create a step change in the growth of the economy and for communities in the North, reducing the economic and social gap in the UK.

Future Investment and Growth Priorities

Under a transformational scenario, passenger numbers through Manchester Airport could increase to over 60 million per year by 2050 compared to 27 million passengers today, including direct routes to over 50 new additional direct long haul routes across South America, Canada, Australia, the US, China and India. With the additional connections, the airport will have connectivity similar to the major international hubs of Frankfurt (Germany), Dubai (UAE), or Amsterdam (Netherlands) today.

The North is reliant on international connections to compete for businesses, talent, and investment on a national and international scale. Manchester Airport has the potential to be the superhub for the North, underpinned by strategic regional road and rail connections, and strengthen the North’s global business connectivity by facilitating direct access to international business destinations and leading innovation districts across the globe.

International connectivity created by Manchester Airport supports tourism, culture, investment, jobs and knowledge exchange. By increasing connections to other world cities, Manchester Airport will bring businesses and communities across the North closer to international opportunities. This will create a step change in the economic growth and support for communities in the North, reducing the economic and social gap in the UK.



To achieve transformational growth, the following priorities need to be delivered

- 2 Deliver high-speed rail links to provide critical connectivity and unlock growth across the North.
- 3 Investment in roads and public transport to become more convenient and affordable, enabling modal shift and reducing congestion and journey times across the whole of the North, to and from Manchester Airport.



How Manchester Airport contributes to the North today

Manchester Airport currently offers direct access from the North to **185 destinations** which are served by over **50 airlines**. The airport plays a pivotal role in providing access to international business and leisure markets from across the North and is therefore **central in delivering a strong economy**.

**The transformed Terminal 2 will unlock capacity** at the airport and allow for new route developments at Manchester Airport which will enable direct accessibility to key and future business and leisure destinations. Infrastructure at the airport enables opportunities for a range of carriers, and it is the only airport outside London with two runways and the overall capacity, scale and runway length to support a full range of long-haul routes.

Today, Manchester Airport handles more than 27 million passengers per year, making it the **third busiest airport in the UK**. It is estimated that Manchester Airport could handle over **60 million passengers by 2050** in a transformational scenario, increasing access to global opportunities for tourism, business, trade, investment, and knowledge sharing across the North.

The North is full of cultural assets, and the airport increases **the global reach of the North** and supports the overall promotion of the Northern Brand, which everyone benefits from.

185

Destinations available through Manchester Airport today.

50

Airlines operating at Manchester Airport today.

27m

Passengers per year through Manchester Airport today.

Manchester Airport supports the business environment across the North to compete globally by acting as the **UK’s Global Gateway in the North**. It provides interconnectivity and global reach to global aviation hubs such as the Middle East which offer direct connections further east. Today, Manchester Airport supports business trips to the USA, Germany, across the UK and beyond and could expand into China, India and Africa to raise the profile of the North on the international stage, supported by surface access improvements via high speed rail.

By opening up new routes to destinations and future cities and acting as the global gateway to the North, Manchester Airport can continue to connect families internationally and create new cultural and business links across the North, increasing the region’s attractiveness to global audiences as a place to invest, visit and study.

Amsterdam Schiphol Airport: Why the Netherlands economy works

The Netherlands has been a trading economy and the gateway to Europe for centuries. It remains fundamentally the same today. The nature of trade and the channels by which goods and services are moved have changed, but the fundamental factors on which this position has been built have not:

- Geography – the Netherlands remains an ideal entry point for companies wishing to serve northern and central European markets;
- Connectivity – originally it was the seaports, including Rotterdam, that provided the Netherlands with its connections to the world. But, as air travel has developed, Amsterdam Schiphol has joined Rotterdam in this role, providing the Netherlands with two of Europe’s most important main ports;
- Openness – traditionally the Netherlands has welcomed overseas travellers and companies and has been a centre of enlightenment and liberal thought. These qualities remain and are an important factor in making Amsterdam and the Netherlands an easy and attractive place to do business;
- Support Services – as its role as a gateway economy has developed, it has generated a cluster of support services, such as banking, insurance, legal and logistics, that mean that potential investors or trading partners are able to access any service they require locally.

The Dutch economy has developed along the lines of a classic trading economy. It is built around three definable groups:

- Trading Companies – these companies may be Dutch or Foreign and provide a wide range of goods or services. But they either use the Netherlands as a base to sell overseas or as a point at which to enter the Dutch, European or even Middle Eastern markets;
- Infrastructure Providers – these companies provide the physical means through which trade is established and exchanged. It includes Amsterdam Schiphol, the Port of Rotterdam and digital network providers;
- Trade support services – an extensive network of companies that provide services to the Trading companies that enable those companies to operate. This includes financiers, insurers, law firms, advertising and other professional services, along with specialists in logistics and distribution.

The economy cannot operate effectively in this manner if the fundamentals are not supported and maintained, including the global connectivity offered by Amsterdam Schiphol.

The UK draws key comparisons with The Netherlands – it is also a trading economy, driven by its island status and location as a staging point between Europe and North America.

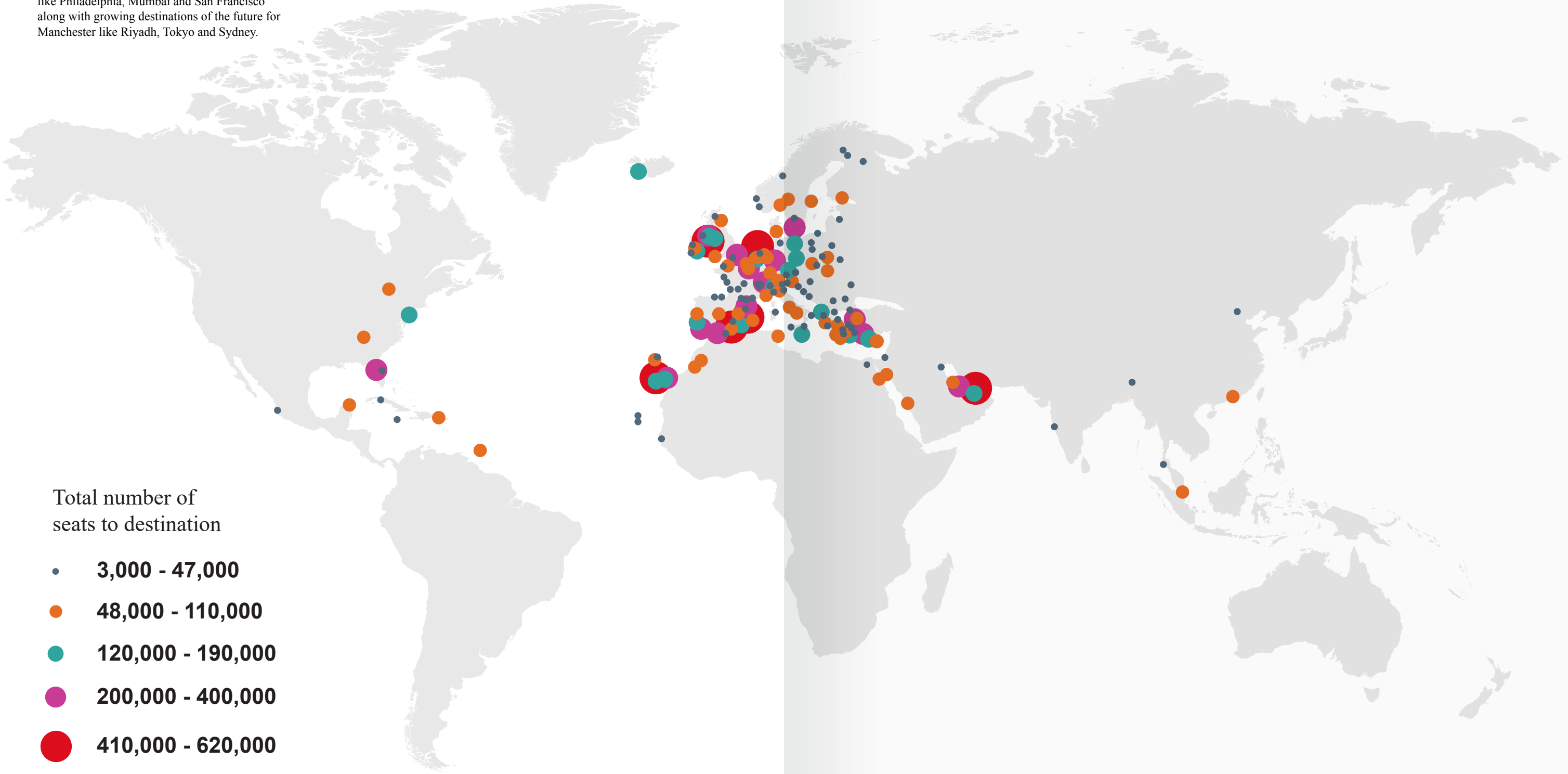


Manchester Airport destinations

The map shows the current Manchester destinations by seat volume. There is clear potential to expand routes and grow capacity to new markets. Under a transformational growth scenario there could be 50 new long-haul routes which would include previously served routes like Philadelphia, Mumbai and San Francisco along with growing destinations of the future for Manchester like Riyadh, Tokyo and Sydney.

Total number of seats to destination

- 3,000 - 47,000
- 48,000 - 110,000
- 120,000 - 190,000
- 200,000 - 400,000
- 410,000 - 620,000



# Local, Regional and National Infrastructure

Better connectivity across the North will bring businesses and communities closer together. With high speed rail links such as NPR and TRU, up to 17.8 million people could easily access Manchester Airport by rail within a 2-hour rail catchment area. Investment in road and rail access across the North will open access to more and farther international destinations for both businesses and tourists, and it will make it easier for people across the North to work at the airport and its supply chain.

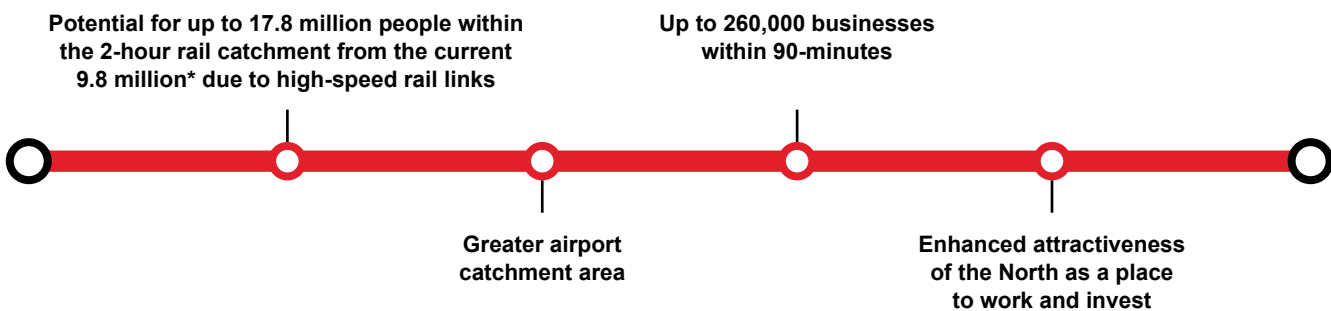
## Future Investment and Growth Priorities

In a transformational scenario, more of the North is connected to Manchester Airport through high-speed rail links. This will connect people and businesses in the North with key places across the UK, widening the social and economic influence of the region.

NPR will contribute to connecting more businesses across the North and could treble the number of businesses able to access the airport within 90-minutes from 70,000 to 260,000, providing better connectivity to key and growing future sectors across the North such as fintech, digital and advanced manufacturing.

Transport for Greater Manchester forecasts an increase of more than 800,000 trips per day on public transport services by 2040, largely as result of employment and population growth. Over time, improvements to transport infrastructure will decrease travel time to Manchester Airport and increase the catchment area of the airport. With Northern Powerhouse Rail (NPR, as assumed by TfN), the 2-hour rail catchment area of Manchester Airport is estimated to increase from 9.8 million to 17.8 million people (using a shorter 5-minute connection interchange)\*.

\*Taken from Steer's Manchester Airport Rail Catchment Analysis (2023)



To achieve transformational growth, the following priorities need to be delivered

- 2** Deliver high-speed rail links to provide critical connectivity and unlock growth across the North.
- 3** Investment in roads and public transport to become more convenient and affordable, enabling modal shift and reducing congestion and journey times across the whole of the North, to and from Manchester Airport.
- 6** The UK aviation strategy should be cross-departmental to have a coordinated approach to policy for aviation growth, trade, economic development, and wider transport investment.





**How Manchester Airport contributes to the North today**

From Manchester Airport, Manchester provides strategic **surface linkages** to other key cities across the North. Local infrastructure across the North enables mobility and further supports the **movement of passengers, business travellers and airport staff**.

**A lack of public transport connectivity is a driver of car usage.** Current infrastructure and services supports only 21% of employees at the airport to travel via public transport; so improving quality and access of public transport is therefore key to reducing congestion and encouraging shifts to **more sustainable travel options**. There is growing demand for staff car parking at Manchester Airport. Without modal shift, a further 6,000 car parking spaces are likely to be required by 2030, costing £27 million.

Transport connections to and from the airport are key to the movement of goods and people across the North. Improvements to surface access to Manchester Airport by road and rail are planned to support its future growth and Manchester Airport has already facilitated key local and regional infrastructure projects, **supporting connectivity across the North** including the Airport Rail Link, A555 Airport Eastern Link Road and the Metrolink service to Wythenshawe. Further surface access improvements will contribute to **expanding the catchment area** of the airport and bringing places across the North such as Liverpool, Bradford, Leeds, York, Sheffield, Hull and Newcastle within greater reach.

Manchester Airport provides domestic air routes to destinations across the UK which are difficult or impossible to reach by train, supporting the **domestic tourism industry and national business ecosystem**. Domestic aviation at Manchester Airport further increases the North’s connectivity to British islands such as Northern Ireland, the Channel Islands and geographically hard to reach destinations experiencing limited or slow rail connectivity. Domestic air routes to UK destinations not easily accessible by car or train will be key to connecting people and businesses across the North and beyond for business, shopping, leisure, entertainment and sport purposes.

**Manchester Airport drives sustainable solutions across local, regional and national infrastructure.** By encouraging the use of more sustainable modes of travel to work than car usage, such as public transport among employees, Manchester Airport contributes to encouraging modal shifts that in the long run will support progress in reducing congestion on the roads.

- MAG is committed to increasing public transport share among employees from 21% to 43%; and for passengers from 19% to 35%.
- MAG currently offers all employees the opportunity to apply for an interest-free loan to purchase an annual season ticket for use on public transport.
- MAG employees benefit from the opportunity to purchase a new bicycle through the cycle to work scheme to encourage greater active travel. Cycle parking is also available across the airport estate.
- Manchester Airport offer 4 weeks’ free travel to new employees across the Metrolink/Stagecoach to encourage staff to use those modes to travel to work.

Manchester Airport provides:  
Links, Routes & Modal Shift.

**Links**

Onward linkages for tourists and business travellers to other places across the North.

**Routes**

Domestic routes to geographically hard to reach destinations from the North.

**Modal**

Shifts encouraging the use of public transport and more sustainable travel options.

Bradford Case Study 1

**Bradford is a young and vibrant city** in the North of England, with a population of over half a million (546,412) and a median age of only 36 versus 40 nationally in 2021. Bradford is also a **culturally important city to the North**, with almost a third (32%) of residents identifying as Asian or British Asian, three times the average across England (10%) and the North (8%).

Bradford has a **relatively low propensity to fly** (number of air trips per capita) (0.74) compared to England (1.32) and the North (0.96). If Bradford’s propensity to fly rose to at least the UK average (1.32) over the next 10 years, **an additional 327,000 trips could originate from the city annually**. This means more people could go on business trips, holidays or to visit friends and family abroad. The high proportion of Bradford households (28%) without car access highlights the importance of public transport connectivity to Manchester Airport to ensuring accessibility to international opportunities.

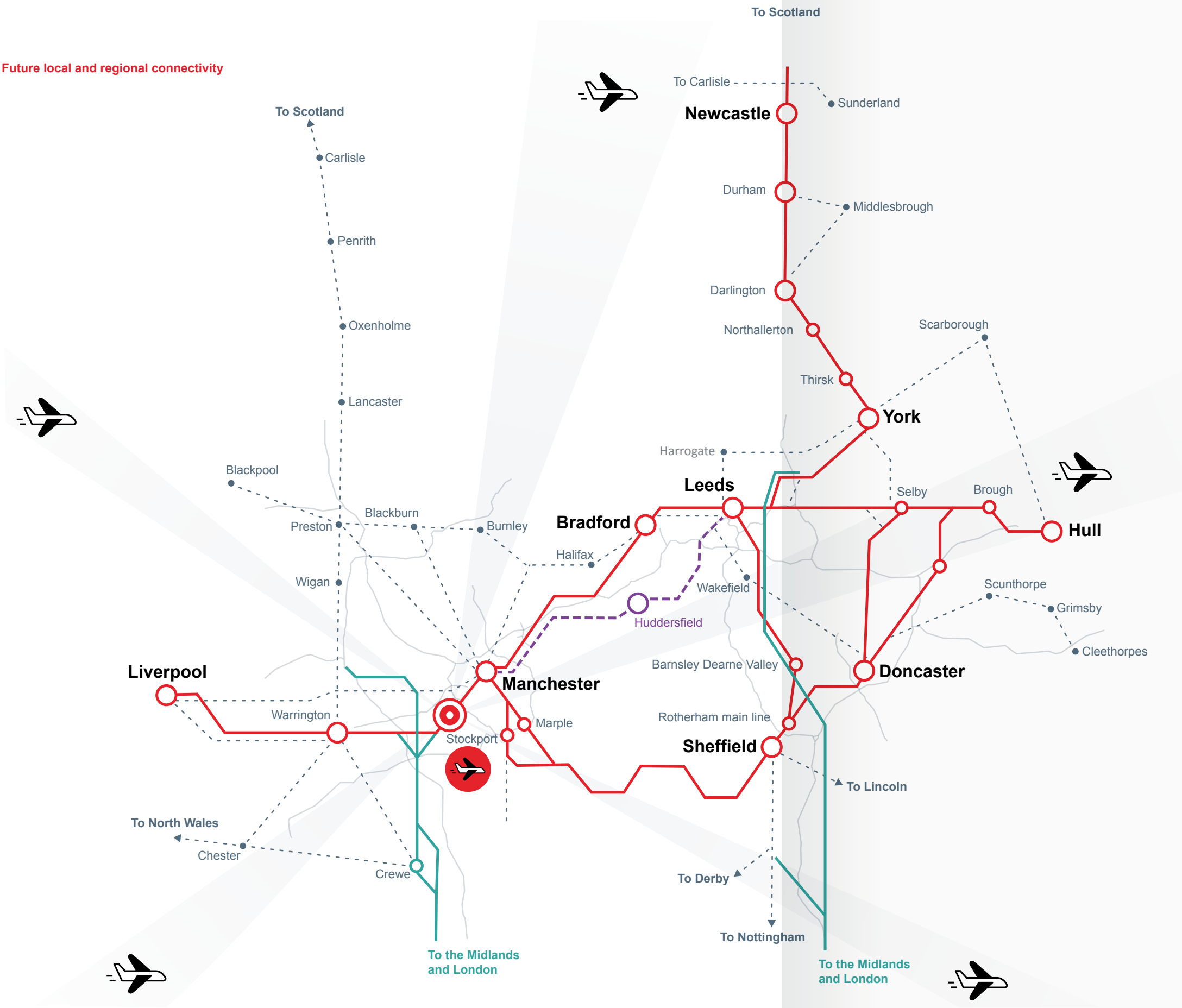
Journey times to Manchester Airport from Bradford are currently 1 hour 35 minutes via train, however, there are no direct train connections. Surface access improvements would bring Bradford closer to Manchester Airport, and bring greater connectivity to the **16,605 businesses (2022) and 206,000 (2021) employees in Bradford** to within commuting distance. **Under the NPR TfN scenario, journey times to Manchester Airport from Bradford could be reduced to 38 minutes and to similar levels as Liverpool and Birmingham.**

Bringing cities across the North, like Bradford, within greater accessibility to Manchester Airport will connect businesses, students, families and friends to international opportunities for work, tourism and important relationships.

Station	2022 Baseline	TRU Scenario	HS2 Scenario	NPR IRP Scenario	NPR TfN Scenario
Liverpool	1 hr 12 mins	1 hr 7 mins	1 hr 7 mins	0 hr 36 mins	0 hr 30 mins
Birmingham	1 hr 45 mins	1 hour 45 mins	0 hr 45 mins	0 hr 45 mins	0 hr 45 mins
Leeds	1 hr 24 mins	1 hour 20 mins	1 hr 20 mins	0 hr 55 mins	0 hr 48 mins
Bradford	1 hr 35 mins	1 hr 35 mins	1 hr 35 mins	1 hr 20 mins	0 hr 38 mins
Hull	2 hr and 54 mins	2 hr 23 mins	2 hr 23 mins	1 hr 56 mins	1 hr 43 mins
Newcastle	2 hr and 59 mins	2 hr 43 mins	2 hr 43 mins	2 hr 15 mins	2 hr 10 mins
York	1 hr 50 mins	1 hr 45 mins	1 hr 45 mins	1 hr 16 mins	1 hr 9 mins
Huddersfield	1 hr 4 mins	1 hr 0 mins	1 hr 0 mins	0 hr 38 mins	0 hr 58 mins
Darlington	2 hr 35 mins	2 hr 22 mins	2 hr 22 mins	1 hr 50 mins	1 hr 40 mins
London	2 hr 19 mins	2 hr 19 mins	1 hr 24 mins	1 hr 24 mins	1 hr 24 mins

Source: Steer’s Manchester Airport Rail Catchment Analysis (2023).

Future local and regional connectivity



In relation to the NPR, HS2 and TRU

- Time by rail to Manchester Airport Station from Newcastle**
- 2022 Baseline\* – 2hr 59 mins
  - TRU and HS2 – 2hr 43 mins
  - NPR (as assumed by TfN) – 2hr 10 mins

**Time by rail to Manchester Airport Station from Bradford**

- 2022 Baseline\* – 1hr 35 mins
- TRU and HS2 – 1hr 35 mins
- NPR (as assumed by TfN) - 38 mins

**Time by rail to Manchester Airport Station from Liverpool**

- 2022 Baseline\* – 1hr 12 mins
- TRU and HS2 – 1hr 7 mins
- NPR (as assumed by TfN) – 30 mins

In relation to the Northern Powerhouse Rail Lines

NPR could treble the number of businesses able to access the airport within a 90-minute rail catchment area from 70,000 to 260,000.

NPR (as assumed by TfN), TRU and HS2 will increase the 2-hour rail catchment area of Manchester Airport to 10.5 million people (using a 15-minute connection time) and 17.8 million people (using a shorter 5-minute interchange).

- Manchester Airport
- HS2 Manchester Airport station
- Northern Powerhouse Rail Lines
- HS2 Line
- Transpennine Route Upgrade
- Existing Network



# Cultural, Social and Pride of Place Opportunities

## Section 5

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# Identity – The Story of the North

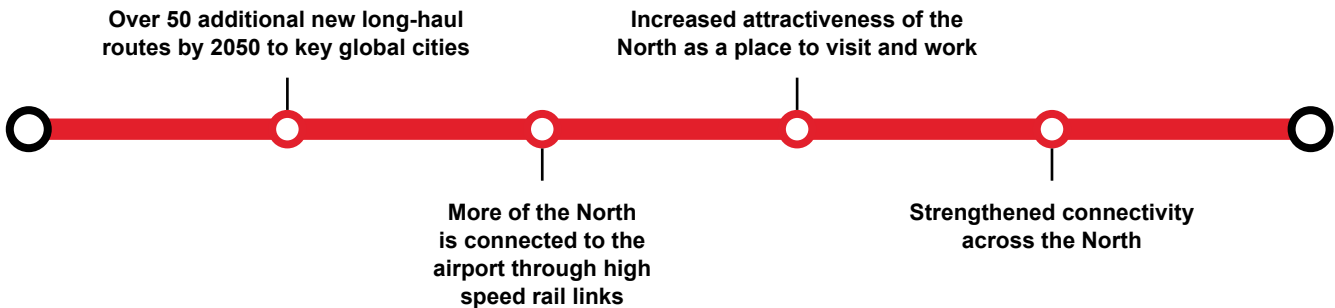
The North is a national and international tourist and business destination, connecting communities across the North with other cultures, friends, family, and businesses around the world. With the right investment to connect more communities to the airport, Manchester Airport could build on its position as the UK’s global gateway between the North and the rest of the world, attracting tourists to the unique places and sites as well as promoting the economic strength of the North to the world.

## Future Investment and Growth Priorities

The North is recognised globally for its arts, culture, industrial heritage and sporting success. It is home to world renowned festivals, heritage sites and National Parks and areas of outstanding natural beauty. The North hosted the European Capital of Culture in Liverpool in 2008 and the UK City of Culture in Hull in 2017. Bradford has also been named the UK City of Culture for 2025.

A strong identity for the North is supported through continued demonstration of cultural value, promotion of the region as a key destination and connecting people nationally and internationally to enjoy all that the North has to offer. The airport creates cultural exchange, opening up cultural dialogue and creating identity and cultural value for the North. Attracting more overseas visitors will establish an international identity for the cities and sites of the North as a key destination to visit and do business.

By opening up new routes to key destinations, the airport will continue to connect families internationally and create new cultural and business links across the North, increasing the region’s attractiveness to global audiences as a place to invest, visit and study.



To achieve transformational growth, the following priorities need to be delivered

- 3 Investment in roads and public transport to become more convenient and affordable, enabling modal shift and reducing congestion and journey times across the whole of the North, to and from Manchester Airport.
- 8 Local Visitor Economy Partnerships should be given long term funding settlements with safeguarded funds to drive inbound tourism to regions in the North from key markets.





How Manchester Airport contributes to the North today

Manchester Airport is key to supporting the identity of the North through promoting the North as an **international tourist destination and connecting communities across the North** with other cultures, friends and family around the world. Offering a range of international destinations from the airport reflects the rich culture and diversity of the North, building an **international identity** for the North as a destination to visit and do business.

The North is home to a number of key national assets with six World Heritage Sites, five National Parks, seven Areas of Outstanding Natural Beauty and four UNESCO Creative Cities. **9 of the 20 most visited areas** in England are located in the North, with Manchester, Leeds, Liverpool, Sheffield and Cheshire West seeing the greatest numbers. For the 2021/22 period, **48%** of visitor attractions in the North West noted an increase in international tourists. As of 2019, **1 in 5 visits** to the North West included watching **live football**, and **3 football stadiums in the North West were amongst the top 8** visited in the UK for overseas football fans. **Old Trafford** in Manchester was the top stadium, generating 226,000 overseas visits and £225 million in spend, followed by Anfield in Liverpool which attracted 213,000 visits and the Etihad Stadium which drew 87,000 international visitors. Manchester Airport plays a key role in unlocking national and international connectivity for the North, Midlands and North Wales, being used by **international visitors to provide access to all the North's regions and attractions**.

The local authorities with the highest number of business visitors travelling via Manchester Airport are **Manchester, Salford, Liverpool, and Leeds**, reflecting the status of these areas as important business centres and the importance of Manchester Airport in supporting **international connectivity**. Around **16% of foreign business travellers** using Manchester Airport **are visiting areas outside the North**. This highlights the attractiveness of flying via Manchester Airport, and the importance of links to and from the North to neighbouring regions.

The role of Manchester Airport in supporting the identity of the North is showcased in the strategy for Terminal 2, which aims to create a **sense of place** and demonstrate **Manchester Airport as the UK's Global Gateway in the North**. Terminal 2 will have a high street area with well-known local and regional brands, restaurants and eateries, drawing inspiration from the North and showcasing the Northern story.

The success of the airport is critical to the success of places across the North, and Manchester Airport supports the identity of the North by opening up **leisure destinations and opportunities abroad, connecting friends and relatives, opening up cultural dialogue and creating identity and cultural value**.



Bradford Case Study 2: A culturally diverse and growing city in the North.

Bradford is vibrant and culturally diverse; there are over 150 languages spoken across the city and 1 in 3 people identify as Asian/Asian British. Bradford is also an economically important city to the North, home to over 16,000 businesses, with strong business and investment ties to Asia and the Middle East. ‘Bradford City of Culture 2025’ is generating international interest and investment in the city. In addition, the university attracts students from 130 different countries to Bradford. International connectivity plays an important role in supporting the cultural diversity and economic success of the city.

One example of how culture and economic opportunity come together is in Leeds Road, where there is an active and growing hub for the Asian wedding market with businesses specialising in jewellery and textiles. The market is a destination for the Asian community across the country and attracts investment from abroad.

No other airport in the North offers the same breadth of destinations as Manchester Airport for business and visiting family and friends abroad. Most people from Bradford travel to Manchester Airport by road. Today, it is difficult for businesses and residents in Bradford to travel to Manchester Airport using rail, due to the unreliable services and inconvenient change overs. There are currently no significant highway projects planned that would improve road connectivity to Manchester Airport from Bradford. Bradford hosts a number of international businesses with many connections in Pakistan, India and the UAE; connectivity with these countries is therefore important.

Increased rail connectivity and improved road connections to the airport from Bradford would increase access to international markets in destinations such as Pakistan and India, which will be key to supporting the prosperity of local industries and communities in Bradford by building on their cultural and economic strengths.

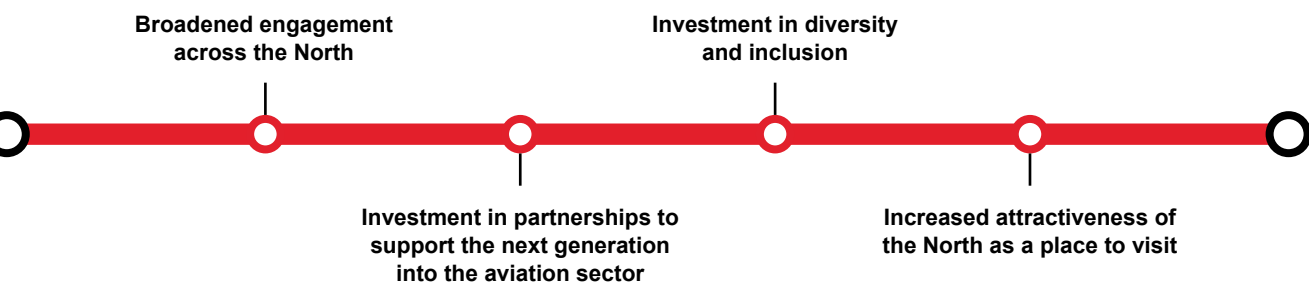


Social Inclusion, Engagement and Pride of Place

Building an economy across the North, where every person has opportunities and places to be proud of is a collective effort. Manchester Airports Group is committed to social inclusion, engaging with communities, and building pride in our places by working in partnership with businesses, local councils and local people. Looking forward, Manchester Airport will continue to extend its engagement and impact further across the North to support successful places.

Future Investment and Growth Priorities

Manchester Airport has a strong culture of engagement and partnership working alongside business, government, and community partners—locally and across the North—to deliver on their mutual ambitions. The airport drives social and economic change across the North through its partnerships and commitment to social value. Looking to the future, Manchester Airport will broaden its engagement with communities and businesses on a wider, pan-regional scale, to promote opportunities at the airport for future employees and support new businesses into the supply chain. Strengthened transport infrastructure through high speed rail links and improved transport infrastructure will enable Manchester Airport to support wider connectivity, providing access to assets across the North and supporting wider social inclusion. Through its international, national, and regional connections, Manchester Airport will promote pride of place across the North—attracting residents and visitors to major culture, nature, arts, historic and sports attractions.



To achieve transformational growth, the following priorities need to be delivered

- 13 Manchester Airport should ensure local partners can benefit from the growth and capitalise on the opportunities from the airport.
- 15 Manchester Airport should continue and expand the positive engagement with community groups.





How Manchester Airport contributes to the North today

Manchester Airport has developed a strong partnership with local communities through a culture of **voluntary community work** in the local area. Through the Manchester Airport Consultative Committee, Manchester Airport **engages with 33 members representing local authorities**, amenity groups and user groups to discuss matters of interest to the community; in **2021/22**, Manchester Airport held a total of **53 community engagement events, attended by more than 340 people**.

Manchester Airport's **Community Funds** have provided invaluable support to local community initiatives, with over **£4 million across a 25-year period** provided to support the work of local community groups. In **2021/2022** the Community Fund delivered **funding to 46 local initiatives** across local communities.

Manchester Airport is committed to **unlocking opportunities that are accessible for all people** and communities across the North through embedding programmes which support and foster an equal, inclusive and diverse work environment. MAG's Equity, Diversity and Inclusion Strategy underpins this approach, setting out key goals to achieve **50% women in leadership, 12% ethnic diversity in leadership, and 12% representations of 16-25s across colleague levels by 2025**.

MAG is committed to **supporting diverse communities** to access education and training in the aviation industry. The Aerozone programme engages young people between the ages of 4-18 to understand opportunities in aviation. **Eighty-six percent of Aerozone visitors** in 2022 came from local **'priority areas and schools'**, referring to those located within a 15-mile radius of the airport and most affected by the operations. The **MACE social value package** has supported a local school to design and build an outdoor classroom (Pendlebury). The airport's **Youth Forum** supports in elevating the North and shaping the future leaders of the region by creating a platform for a range of communities and demographics to engage with the airport and the industry.

53

community engagement events in 2021/22

£89,203

in funding to 46 local initiatives in 2021/22

86%

of Aerozone visitors came from 'priority areas and schools' in 2022.

The long-term impact of Manchester Airport engagement with local schools and colleges

“I joined MAG aged 16 straight from school in 1987. I have always loved the thought of working at an airport, and when my high school in Wythenshawe hosted a careers workshop, I was inspired to apply to MAG's youth training scheme (now apprenticeships). At the time, the MAG programme was the only scheme available which combined my interest in administration and desire to work at an airport. I have worked at MAG ever since.

The youth training scheme offered a varied experience in administration, recruitment and training and involved a mixture of both college and workplace learning. MAG presented me with the opportunity to further develop my skills while on the programme, during which I completed my Level A occupational testing.

After completing the Scheme, I was offered a permanent role in recruitment and training before moving to Security Operations in a multi-skilled operational role and then transitioning back to recruitment where I found my passion for making a change to people's lives through creating and offering job opportunities.

During my 36-year career at MAG, I have acquired skills through various training courses, held managerial roles in various areas of HR and further progressed my leadership skills, currently overseeing a team of almost 30 people.

The vibrancy of the airport and culture of the working environment makes working at MAG so attractive. Through the varied roles at MAG, I have had the opportunity to share my experience and career journey and inspire the next generation to work at MAG through mentoring at my old school.”

Lisa Higgins, Head of Volume Recruitment and Vetting



## Manchester Airport Community Trust Fund

To celebrate the 25th anniversary of the Manchester Airport Community Trust Fund, Manchester Airport ran a competition for primary schools within a 10-mile radius of the airport to win up to £25,000 to use to invest in an ‘eco-garden’, designed to act as a learning aid and to promote environmental awareness among pupils.

22 schools applied and in December 2022, Cheadle Catholic Infant & Junior school in Stockport was awarded £25,000 from Manchester Airport’s Community Trust Fund. The school will use the funding to create a sustainable community allotment, growing produce that will be used in cooking classes, an eco-garden designed to attract native plants, wildlife and biodiversity, and an open-air classroom with a weather station that will be used in science and geography sessions.

Newall Green Primary School in Wythenshawe was also awarded £10,000 and Brooklands Primary School in Trafford received £5,000.

“It is fantastic that we’ve been able to engage so many pupils in 22 different schools across our catchment area and encouraged them to think about the importance of sustainability and protecting the environment. It is a fitting way to mark 25 years of the Community Trust Fund, which has made, and continues to make, a hugely positive difference in our neighbouring communities.”

Chris Woodroffe, Managing Director at Manchester Airport.



Sustainability

The North is leading the way in delivering innovative decarbonisation solutions and Manchester Airport is playing its role in creating a more sustainable aviation sector. Manchester Airport can ensure the North remains competitive and can adapt, respond to, and realise the benefits from expected changes across the aviation industry.

Future Investments and Growth Priorities

In a future transformational scenario, Manchester Airport will provide the foundation for a cluster strength in sustainable aviation across the North.

The North requires international travel to grow the economy and compete internationally. Emissions per passenger have been decreasing over recent years and with industry advances, will continue to decline. MAG has been a thought leader in aviation innovation, both in sustainability (as the first carbon neutral airport operator in the UK, for example) and in the rapid growth and democratisation of air travel over the last 30 years. Manchester Airport can maximise opportunities in emerging technologies such as Sustainable Aviation Fuel to deliver upwards of 1,500 green jobs and investment across the North.

The airport is committed to delivering the enabling technology and infrastructure to ensure the North is

equipped for a sustainable aviation industry. The UK government launched the Jet Zero Strategy in 2022, which aims to deliver net zero aviation by 2050, working closely with the International Civil Aviation Organisation (ICAO) and committing to the Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA). MAG is fully committed to leading the industry in reaching that goal in addition to its commitment in line with Greater Manchester that its operations will be net zero by 2038.

The aviation sector is constantly evolving—adopting new technology to make flying safer, more affordable, and more efficient. Investment and collaboration between, CAVU and research institutions and research institutions across the North will help respond to and realise the benefits from expected changes across the aviation industry such as automation, electrification, digitalisation, and data sharing.



To achieve transformational growth, the following priorities need to be delivered

- 3 Investment in roads and public transport to become more convenient and affordable, enabling modal shift and reducing congestion and journey times across the whole of the North, to and from Manchester Airport.
- 5 Supercharge government funding and policy support for aviation sustainability and R&D to establish the UK as the world leader in sustainable aviation.



How Manchester Airport contributes to the North today

The North is at the forefront of the UK’s response to climate change. Through strong **partnerships, capabilities, and innovation** the North is seizing opportunities to meet the UK’s decarbonisation targets and become world leading in energy and clean growth. Manchester Airport plays a key part in supporting the North to adapt and respond to the changes in the aviation industry, setting out a target to achieve **net zero carbon emissions from MAG airport operations by 2038**, ahead of the 2050 UK target date.

Within the UK aviation industry, Manchester Airport is committed to leading the way on sustainable aviation:

- **Manchester Airport has been carbon neutral since 2015. Global airport decarbonisation started in Manchester**, through carbon accreditation in which Manchester Airport has achieved the highest level.
- Positioning the North as the **leader in Sustainable Aviation Fuel (SAF)**, through Manchester Airport’s Memorandum of Understanding (MOU) with Fulcrum BioEnergy Limited UK to be the first UK airport to receive direct pipeline supply of SAF by the late 2020s. The production and distribution of SAF in the region has the potential to provide upwards of **1,500 green jobs, and contribute over £219 million to the regional economy**.
- The Airport’s runway was the first in the UK to use energy efficient LED lights and **56% of the energy Manchester Airport used in 2021/22 was procured from renewable sources**.
- **Manchester Airport is one of only two airport operators on the Governments Jet Zero Council** and MAG has set out commitments to help drive progress towards net zero aviation. This includes delivering Jet Zero educational materials, funding three PhD projects on air travel decarbonisation, and launching competitions and incentives to support airlines to operate zero emission flights.

- **MAG is working on launching a Jet Zero curriculum focused on SAF in October 2023**, demonstrating its commitment to growing skills in the future of the aviation industry.

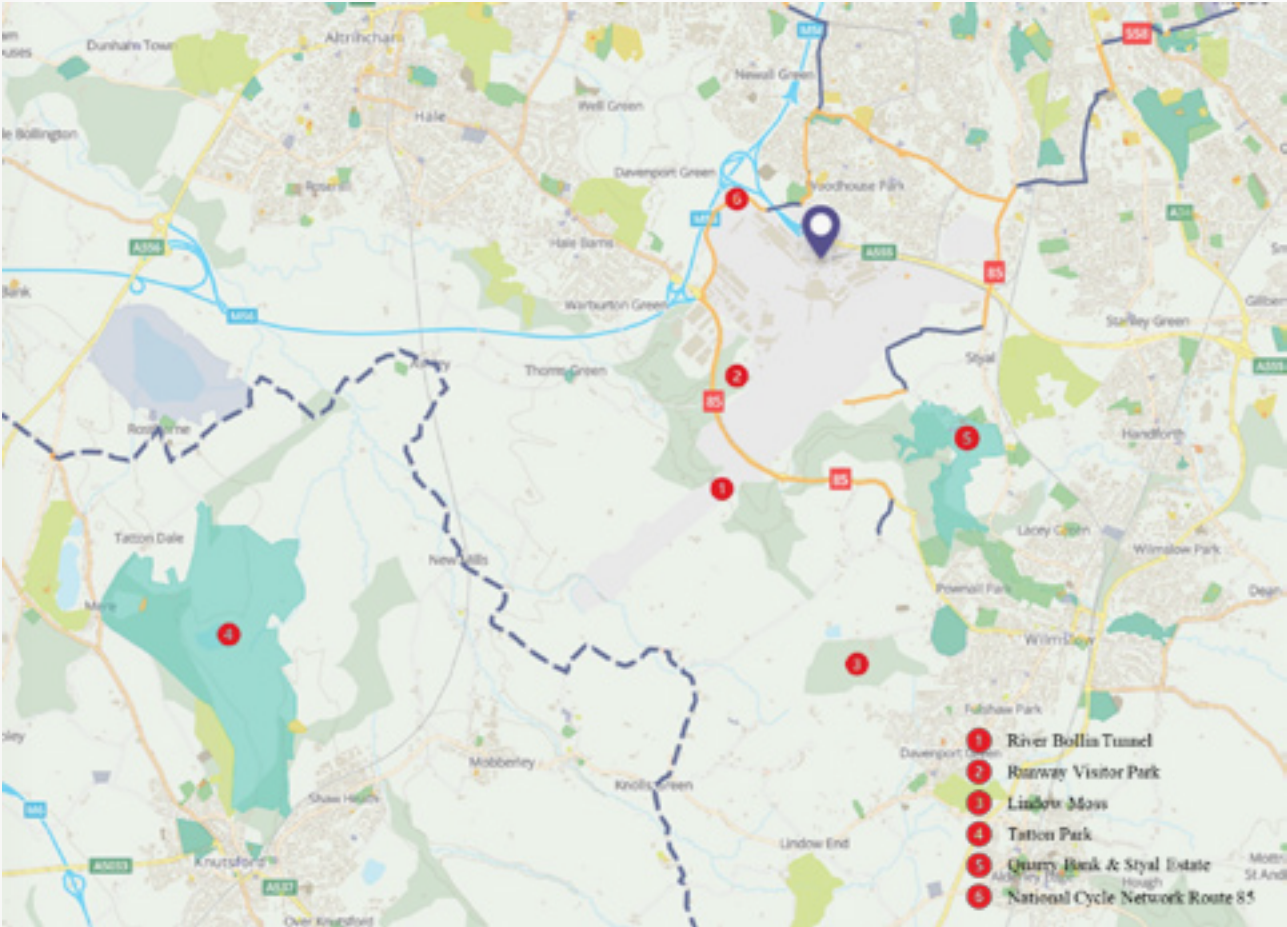
Manchester Airport strengthens the environmental value of the North, pioneering the way forward for biodiversity conservation, by protecting species under the runway for the past 30 years. **Within the Manchester Airport estate, greenspace delivers a total recreational value of over £11 million per annum**. This includes:

- River Bollin Tunnel – situated under Runway 2 and part of the Bollin Nature Trail
- Runway Visitor Park – outdoor viewing area and visitor centre, hosting 15,000 school children a year and 334,737 visitors in 2022

*Not within Manchester Airports estate but of significant importance to the local environment and recreational value are:*

- Lindow Moss – largest lowland peatland in Cheshire
- Tatton Park – National Trust estate
- Quarry Bank & Styal Estate – National Trust estate
- National Cycle Network Route 85 and Manchester Airport Orbital Cycleway – skirts the perimeter of Manchester Airport

The importance of connectivity between landscapes for nature recovery is increasingly recognised, for example, through the UK Government’s Environmental Land Management scheme. Although each of these greenspaces are separate, nature interacts with all and connectivity between is of significant importance. Manchester Airport’s Conservation Strategy will recognise this importance and the role Manchester Airport can play.



Recreational and environmental assets

**56%**  
of Manchester Airport’s energy usage in 2021/22 was from renewable sources

**2038**  
Net Zero Carbon emissions from MAG airport operations by 2038

**2015**  
Since 2015 Manchester Airport has been carbon neutral

**Development of a Conservation Strategy**  
Demonstrating its investment in a sustainable future, Manchester Airport is committed to growing its ecological and biodiverse environments. A Conservation Strategy will be launched setting out MAGs approach to managing land set aside for ecological or specific landscape purposes and its commitment to delivering biodiversity net gain. Manchester Airport will work with local partners on supporting the delivery of the conservation strategy.



# Civic and Local Government Opportunities

## Section 6



Local Government Funding and Shared Ownership

The North has incredible communities, business and civic leaders who are shaping a more prosperous and sustainable future. Through its partnerships, Manchester Airport helps promote the North as a place to invest and live, ensuring it is recognised globally as a thriving economic area with ambition for growth and a good quality of life.

Future Investment and Growth

In a future transformational scenario, with high economic growth and a positive and supportive policy and investment environment, Manchester Airport could support the growth of the North through strong, collaborative partnerships with local and global stakeholders driving social and economic change across the North.

Manchester Airport could extend its partnerships, like the Manchester China Forum, to include more foreign partners and a wider base across the North. To maximise the North’s potential, Manchester Airport needs to continue to build partnerships regionally, nationally, and internationally to create a coalition of support that recognises the North as

a place to invest. This will require commitment and support from local Mayors, Councils, and UK Government to Manchester Airport as a key partner in the growth of the North. It will require Manchester Airport to be a good partner and invest in working across and with organisations to create opportunities for the North.

The driver for successfully delivering investment and growth over the past 25 years has been dominated by excellent partnership working and a shared voice between the public and private sector. The outcomes that MAG have delivered as a result of its partnership working include a joined-up approach to transport, so taking public transport to an international flight is seamless and affordable. Local people can access a wide range of careers at the airport and throughout the supply chain through a more coordinated skills and employment strategy. And the co-ownership model that has tied the airport’s success to Greater Manchester’s success, so that the dividends from growth are paid back into the community.



To achieve transformational growth, the following priorities need to be delivered

- 13 Manchester Airport should ensure local partners can benefit from the growth and capitalise on the opportunities from the airport.
- 14 Build on the success of place-based partnerships to support trade and international dialogue in priority markets.





**How Manchester Airport contributes to the North today**

Through an inclusive ownership model, Manchester Airport’s success is tied to Greater Manchester’s success. The shared ownership and payment of dividends back to the Greater Manchester local authorities creates a mutual incentive to support local economic growth supported by international connectivity, tourism, and trade.

The airport drives social and economic change across the North through its partnerships and commitment to social value. It supports in elevating the North and shaping the future leaders of the region by creating platforms, such as the Youth Forum, for a range of communities and demographics to engage with the airport and the industry.

Working alongside local businesses and representative groups, Manchester Airport works closely to support businesses’ ambitions to trade internationally, attract tourists, and grow their markets. Today, MAG works with tourism bodies, universities, and businesses to reach a wide range of communities and initiatives. The airport is also involved in a variety of Boards, working to grow a more prosperous, sustainable and inclusive North including the Northern Powerhouse Partnership, North West Business Leadership Team, Manchester India Partnership and Manchester China Forum.

Manchester Airport supports its local partners and communities through:

- Contributing more than £13 million in business rates.
- Financial contributions to Greater Manchester businesses, communities, and infrastructure supporting local growth.
- MAG makes a significant contribution to the UK Exchequer each year, through payment of a range of taxes in the UK including corporation tax, employment taxes, VAT and stamp duty land tax.
- Working with tourism bodies, universities, and corporates to reach a wide range of communities.
- Community Funds have provided invaluable support to local community initiatives, with over

£4 million across a 25-year period provided to support the work of local community groups.

- Manchester Airport is part of Greater Manchester’s International Marketing Advisory Board.

Manchester Airport is involved in a variety of Boards and partnerships demonstrating its commitment to growing partnerships that support the success of the North, including:



10

The 10 Local Authorities of Greater Manchester are shareholders of Manchester Airport

£4m

of Community Funds across a 25-year period to local groups

£13m

Manchester Airport contributes in business rates

“Manchester Airport is crucial to Manchester’s global ambitions and economic success. It’s a great example of public-private partnerships in action. The history of a municipal asset means that private ownership brings access to new investment capital to support continued growth in the benefits the airport brings. Importantly though, through Council part ownership, it means that growth directly benefits the local community and economy, and we work collaboratively to ensure the airport and Manchester work together to improve opportunities across the city and beyond.”

Bev Craig, Leader of Manchester City Council



# Conclusions

## Section 7





## The North could not compete on a national and global stage without Manchester Airport.

Access to international travel changes our perspectives—it opens our minds to new experiences, cultures, and knowledge. It also creates new opportunities to trade goods, services, and ideas. With the right policy conditions, economic climate, investment, support, and collaboration, Manchester Airport has the opportunity to help create transformational change for the North.

- Businesses in the North will be enabled to establish or retain headquarters or other significant functions in the North, and not have to relocate them.
- People in the North will have easier and more affordable trips abroad to explore new places, visit friends and family, or relax from their hard work.
- International leisure visitors will have a chance to see the North of England, and beyond—to experience culture, sport, nature, and history.
- Universities and institutes in the North will attract talent—both students and academics—from all over the world to work, study, and share ideas.



These international connections send ripples through the economy and communities in the North. With the right policies and investment, Manchester Airport can help deliver transformational change for the North, including:

- 1 **GVA impact in the North tripling** from £5.7bn in 2022 to £16.3bn in 2050.
- 2 **Potential for over 50 new additional direct long-haul routes opening by 2050**, compared to around 25 direct long-haul in 2022.
- 3 **Around 25 new direct short-haul routes opening by 2050**, in addition to over 130 direct short-haul today.
- 4 **Number of people working at Manchester Airport rising to 31,400 by 2050<sup>1</sup>** from 20,200 today.
- 5 **Supporting 165,100 people in employment across the wider economy of the North by 2050<sup>2</sup>**, rising from 80,700 people today. This is equivalent to the population of Harrogate.
- 6 **Supporting 38,500 jobs through inbound leisure tourism in the North by 2050**, rising from 15,700 jobs today.
- 7 **260,000 businesses can access**

- Manchester Airport within 90-minutes with Northern Powerhouse Rail<sup>3</sup> by 2050**, compared to 70,000 businesses today.
- 8 **Potential for over 60 million passengers per year by 2050**, compared to the 27 million today.
- 9 **Connections to almost 50 additional key global cities by 2050** (defined as GaWC Alpha and Beta cities). These connections mean Manchester Airport will have global connectivity similar to that of Frankfurt (Germany), Dubai (UAE), Istanbul (Turkey), Amsterdam (Netherlands) and Doha (Qatar) today.

<sup>1</sup> Direct On-site and Direct Off-site.  
<sup>2</sup> Total Employment Impacts includes Direct On-site, Direct Off-site, Indirect, Induced, Business Productivity – Passengers, Business Productivity – Freight, Inbound Tourism  
<sup>3</sup> Transport for the North, “At a glance: Northern Powerhouse Rail”, [TFTN\\_-\\_NPR\\_At\\_a\\_Glance.pdf\(transportfornorth.com\)](#)

Manchester Airport has the potential to be the superhub for the North, underpinned by strategic regional road and rail connections, and strengthen the North’s global business connectivity by facilitating direct access to international business destinations and leading innovation districts across the globe. To reach the transformational growth scenario key actions need to be delivered including building certainty and confidence in the UK market, investing in road and public transport, delivering a UK aviation strategy that is cross-departmental, and focusing on driving inbound tourism in the North.

MAG, through its Manchester Airport operations, will work closely with a wide range of partners to achieve these shared ambitions. However, a transformational change for the North will require supportive policy and economic conditions alongside investment in public transport, including high speed rail, investment in skills, supporting innovation, engaging communities, promoting cultural connections, and more. All of this will be enhanced through greater international connectivity—access to new markets, attracting investment, supporting tourism, and bringing the world closer to the North and the North closer to the world.



Definitions and Acronyms

*The North*  
The North is defined in the scenarios as North West, Yorkshire and the Humber, and North East.

*Superhub*  
A transport hub which provides connectivity and links across a number of different modes of transport.

*Prosperity*  
To be ‘successful’ or ‘thriving’, particularly in relation to economic wellbeing.

*Businesses and communities*  
Businesses and communities within the defined North (as above).

*UK’s global gateway in the North*  
Manchester Airport as an entry point to the wider North for global visitors.

*Productivity*  
The efficiency of production of goods or services and a key source of economic growth and competitiveness.

*Inbound tourism*  
The act of someone travelling to a country other than that of where they live for the purpose of tourism.

*Outbound tourism*  
The act of travelling ‘out’ of your home country for the purposes of tourism.

*Propensity to fly*  
Number of air trips per capita- strongly determines future demand for air travel among business and leisure travellers.

# Appendix 1

## Scenario Modelling: Methodology





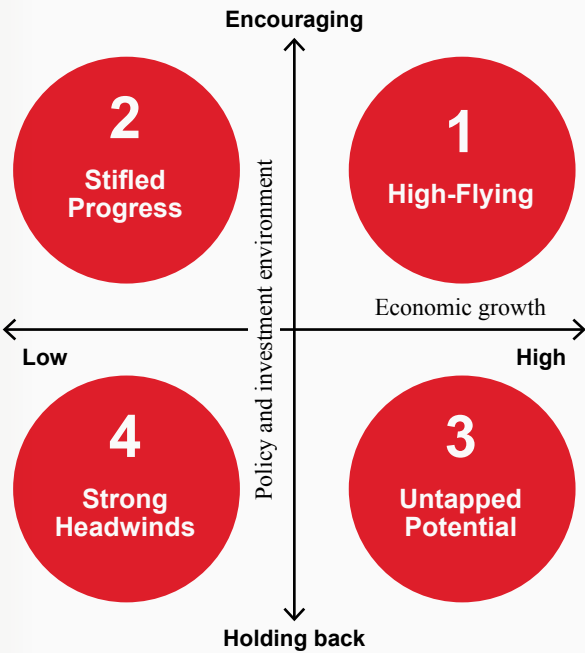
Introduction

# Scenario Modelling: Methodology

The research report puts forward four hypothetical future positions for the North and for Manchester Airport (see Figure 1). These positions are used to frame how the North and the airport will look, what the airport will contribute, and the actions or circumstances required to achieve each scenario.

The demand, economic, and connectivity impacts associated with these different growth scenarios have been developed by York Aviation, a specialist air transport consultancy with extensive experience in traffic forecasting and economic impact assessment. The analysis presented here builds on the existing economic impact research undertaken by York Aviation in late 2022 and early 2023, using the detailed model developed through that process.

This existing model has been complemented by a high-level demand model that considers potential growth in demand in the Northern half of the UK and Manchester Airport’s market share evolution over time under different circumstances. This model includes a route model that considers which routes might come forward by 2050. It should be emphasised that this is not a detailed demand forecasting model but a tool to enable analysis of the economic and connectivity effects of the four scenarios described above.



**Figure 1**  
Future Scenarios for the North and Manchester Airport

Overview of the Model

Figure 2 shows the broad process through which the scenarios are analysed. This describes a process of examining the potential market effects of different economic growth and policy scenarios to provide a view on the future demand and new route potential for Manchester Airport, before considering how these developments will affect the economic impact of the airport in the future, both in terms of its operational economic footprint and its role in facilitating growth in the wider economy.

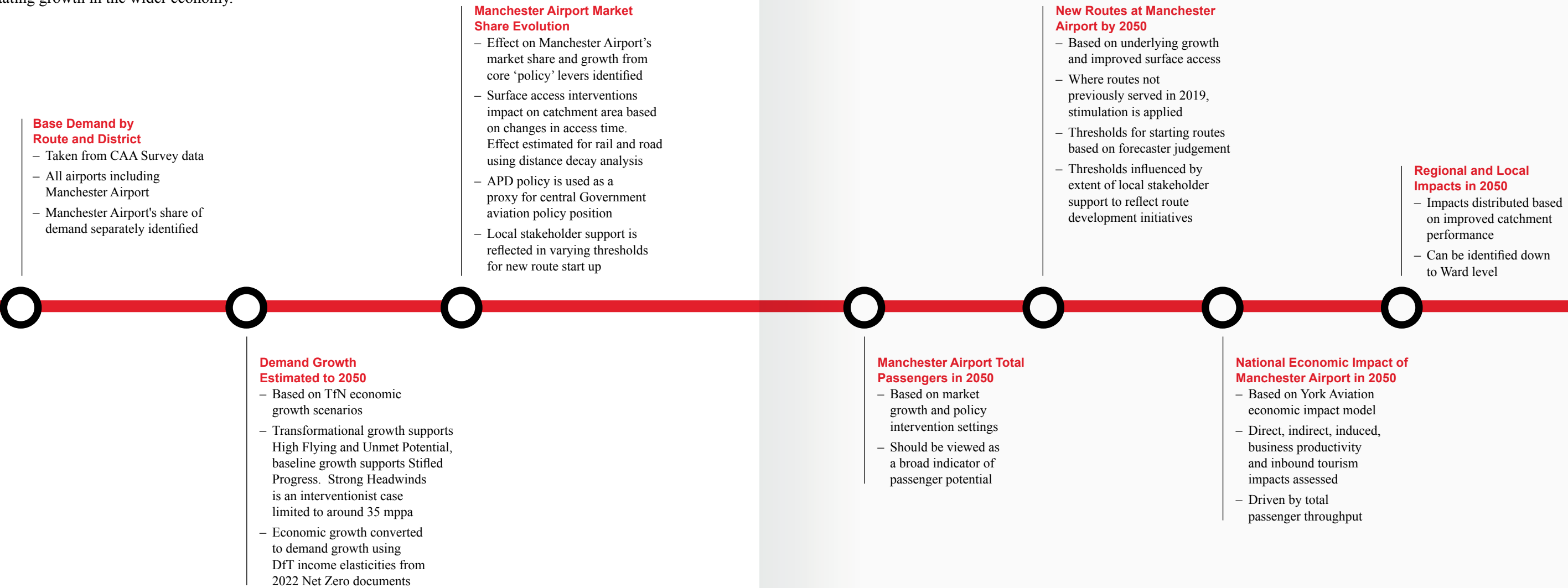


Figure 2  
Overview of the Scenario Modelling Approach



Underlying Demand Growth Assumptions

The underlying passenger demand growth assumptions that underpin the estimates of Manchester Airport’s 2050 traffic potential are set out in Table 1. It should be remembered that this is not the expected growth at Manchester Airport but the growth of the market from which it draws its traffic. In each case, the Transport for the North economic growth scenario that underpins the scenario is also shown.

	Stifled Progress	High Flying	Strong Headwinds	Unmet Potential
TFN Economic Scenario	Baseline	Transformational	N/A – artificially restricted	Transformational
Domestic	53%	67%	42%	50%
Short Haul	69%	86%	58%	69%
Long Haul	86%	107%	75%	90%

**Table 1**  
Underlying Demand Growth by 2050  
Source: York Aviation.



Policy Lever Assumptions

The policy environment affecting the growth of the airport is reflected in four policy levers that can be altered within the scenario model:

TfN Northern Powerhouse Rail and HS2 (or equivalents)

The delivery of this key rail infrastructure can be switched on or off within the scenario model. When switched on, this reduces the journey times to Manchester Airport from across the North in line with the recent research undertaken for MAG by Steer. The resulting improvement in market capture for each district is then estimated based on an econometrically derived distance decay factor, estimated using CAA Passenger Survey data.

Road Investment in the North

There is limited clarity as regards strategic road schemes across the North by 2050 and their impact on journey times. The model therefore enables a choice of three options to be chosen:

- Status Quo – road access times to Manchester remain as now.
- Positive 5% improvement - investment in the road infrastructure results in a 5% improvement in access times by 2050.
- Negative 10% worsening – a lack of investment in the road network results in a 10% increase in road access times as congestion worsens.

Central Government APD Policy

This is used as a proxy for the UK Government’s position in relation to encouraging airport growth and new route development across the UK. Again, the scenario model allows three possible options:

- Neutral – there is no change in APD in real terms by 2050.
- Positive – APD is assumed to be halved in real terms by 2050.
- Negative – APD is assumed to be doubled in real terms by 2050.

Local Stakeholder Support

The importance of local stakeholders in bringing forward new routes is well recognised. They have an essential role in providing monetary and non-monetary support for route development activities. Within the model, the extent of this stakeholder support is reflected in the demand thresholds required for starting new routes from Manchester Airport. Again, the model offers several options:

- Strong local partnerships but limited budgets. Only in-kind support – this reflects a neutral position with no change to the base route start-up thresholds.
- Strong local partnerships – marketing support and new route incentive packages – local stakeholders are actively involved in route development providing resources to support route marketing and the development of broader incentive packages. This results in a 20% reduction in the thresholds required to start a route.
- Difficult local policy environment, existing support packages withdrawn – local stakeholders withdraw existing levels of support and take a negative stance towards future route and airport development. This results in an increase of 20% in the demand threshold required to start a new route.

The application of these policy levers to each of the four scenarios is summarised in Table 2 below.

	Stifled Progress	High Flying	Strong Headwinds	Unmet Potential
TfN Northern Powerhouse Rail and HS2 (or equivalents)	No	Yes	No	No
Northern Road Investment	Neutral Status Quo	Positive 5% Improvement	Negative 10% Worsening	Negative 10% Worsening
Central Government APD Policy	Neutral	Positive	Negative	Negative
Local Stakeholder Route Support	Strong local partnerships but limited budgets. Only in-kind support	Strong local partnerships – marketing support and new route incentive packages	Difficult local policy environment, existing support packages withdrawn	Strong local partnerships but limited budgets. Only in-kind support

Table 2  
Application of Policy Levers by Scenario  
Source: York Aviation.





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