

Setting intentions for Wales' National Airport

CARDIFF AIRPORT 2040 MASTERPLAN





Croeso Gymru Welcome to Wales



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FOREWORD

2018 has been a transformational year for Cardiff Airport and for Wales – we’ve already welcomed over 8% more passengers to the Airport and more inbound visitors to the country than ever before.

We’ve delivered on our promise to grow the business, achieving over 50% passenger growth since our change in ownership in 2013. We have also secured a global flagship Middle Eastern carrier in Qatar Airways. This has transformed Cardiff Airport into a vital gateway for both Wales and the UK, which significantly enhances our relationship with the world.

We continue to be ambitious and have the aim of achieving 2 million passengers by 2021 and 3 million passengers by 2036.

We will continue to substantially improve the Airport for all of our customers, to ensure that anyone who travels in and out of Wales has a truly enjoyable and memorable experience.

We have more work to do to achieve our objective of creating a great Airport with a wide range of facilities, of which Wales and the UK can be truly proud.

This Masterplan sets out our ambitions and the confidence we have in our business, and in the region, for the coming 20 years and beyond. As a strategic asset central to the national success story, the Airport plays a vital role in delivering value for Wales, whilst developing even further as a viable alternative gateway to the UK.



Roger Lewis
Chairman

This Masterplan has been created to set out milestones up to the year 2040, that enable us to meet our vision for the future and to position Cardiff Airport as a key part of the UK's transport strategy.

Whilst we are proud of all that has been achieved to date, we recognise that the needs of the modern traveller are evolving. We have ambitious plans for growth, which can only be achieved if we enhance our infrastructure and create a 5* airport experience for customers that is efficient, modern and enjoyable.

Overall, we want to optimise our use of the Airport site and improve our facilities and operations to maximise our role in creating opportunities for the region and Wales as a whole.

We aim to ensure that the Airport is integrated into local, regional and national transport planning, Local Development Plans and development of the Capital Region and its City Deal. This will help us to secure investment to improve transport connectivity across the country as well as to and from the Airport.

This Masterplan gives us an opportunity to embark on a period of engagement with stakeholders, customers and neighbours; so that we can gain insight, inform and shape Cardiff Airport's future.



Deb Barber
CEO

1 INTRODUCTION

Cardiff Airport aspires to be an outstanding capital city airport connecting Wales to the world and the world to Wales, whilst delivering an exceptional customer experience. Our vision is to be a pioneering Airport business, making Wales proud. Our purpose is to continue to transform our business through operational excellence, with our team and customers at the heart of all we do.

To support these aspirations, we have prepared our Masterplan. The Masterplan sets out our ambitious plans for growth over the next 20 years to become a key gateway to the UK.

Cardiff Airport has an important role, both as an international gateway and as a major driver within the Welsh Economy, supporting 1,800 aviation-related jobs at the Airport as well as directly and indirectly supporting a further 2,675 jobs across the wider area. The overall gross value added impact to the local economy is £102million and 30% of our passengers are visitors to Wales.

Passenger numbers have grown 8% in the last year, with more than 1.5 million passengers now choosing Cardiff Airport annually. 18 airlines regularly use Cardiff Airport, many of which have introduced new destinations and increased capacity on existing routes.

We currently serve:

- over 50 direct routes
- over 900 connections
- 11 routes to major hub airports.

The core catchment area of our passenger market within Wales has a population of 2.4 million, with an outer catchment area in the South West of England containing a further 4 million.

We benefit from being located within the Cardiff Airport and St Athan Enterprise Zone, which offers unrivalled opportunities for investment in the site and surrounding areas. The Enterprise Zone offers a wide range of development sites and business accommodation, providing opportunities for the development of bespoke facilities or investment in existing accommodation.

Our facilities, which include an airport operation and runway that's active 24/7, enable us to accommodate many aviation and aerospace companies and related services, including British Airways Maintenance Cardiff (BAMC) and Cardiff Aviation Training Centre.





The core catchment area within Wales stands at a population of 2.4 million with an outer catchment area in the South West of England of a further 4 million.

2 OUR VISION, PURPOSE & VALUES

We have developed a set of guiding principles to provide clarity in our decision making and future direction. These principles take into account the future needs of Wales - an ambitious country focused on growth and inward investment. They form the vision, purpose and values by which we develop our ambitions.

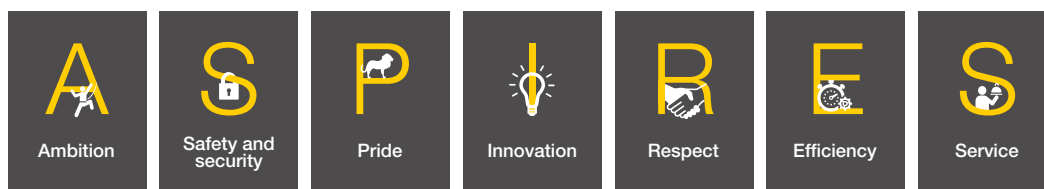
Our vision is to be a pioneering Airport business, making Wales proud.

Cardiff Airport is a gateway to Wales and the UK, creating travel opportunities for leisure and business travel alongside freight operations.

Our purpose is to continue to transform our business through operational excellence, with our team and customers at the heart of all we do.

At the core of our business is a customer-centric approach to delivery. Cardiff Airport cares and values the loyalty of every customer and we aim to provide an experience that exceeds expectations.

We have a set of shared values, which help us to achieve our business priorities:





*At the core of our business is a
customer-centric approach to delivery.*

3 DRIVERS & OPPORTUNITIES FOR CHANGE

3.1 CONNECTIVITY AND ACCESSIBILITY

Cardiff Airport offers international access to Wales and is a key gateway to the UK. An integrated approach to our transport strategy will improve access to the region, including the Airport, and maximise our role in creating potential opportunities for the Cardiff Capital Region and beyond.

Surface access to the Airport has been frequently cited as an issue during Welsh Government consultations. Proposed schemes seek to address this as part of a wider focus on improvements to connectivity within the Vale of Glamorgan and the region.

As part of the development of the Cardiff Capital Region and corresponding City Deal, there is a strong political will to improve transport connectivity across South-East Wales, protecting and enhancing employment and investment opportunities to help retain and attract a skilled population. It is envisaged that investment at and around the Airport will help to ensure that the Cardiff Capital Region is better connected and as a result more competitive and attractive to business and visitors alike.

Improvements to transport connectivity within the region are already planned and development at Cardiff Airport will help to maximise those initiatives, seize opportunities and respond to challenges. For example, electrification of the Great Western Mainline Railway, the Metro, M4 Relief Road around Newport Scheme and removal of the tolls on the Severn Bridges will greatly assist in supporting the connectivity, prosperity and economic competitiveness of Wales.

3.2 CUSTOMER EXPERIENCE

By better understanding the way customers access and use Cardiff Airport, the better we can plan our proposals.

It is important to our long-term success that people want to work at, visit and use our Airport. We want to create a place that is attractive, functional and flexible. It is vital that our buildings and infrastructure operate in the best possible way to accommodate different needs.

We want to make the Airport as easy as possible to access, navigate and enjoy. As part of our proposals, we intend for a new and modern terminal to be integrated with different and sustainable transport choices. Our Masterplan seeks to establish different spaces for complementary land uses, aiming to maximise connectivity, movement, value and user experience.

3.3 TECHNOLOGY

A new terminal will allow us to integrate the latest technology for aviation, customers and other users, creating a 'smart', digitised experience.

We are proposing a new and modern terminal, cargo facility and sustainable low carbon transport infrastructure – these elements will help us to better provide the required upgrades to operate more efficiently.



3.4 CULTURE AND IDENTITY

Wales has a thriving culture and identity, which includes our landscape, language, sport and arts, and is recognised across the world.

Cardiff Airport plays an important role in connecting people with key visitor attractions, including tourism, leisure, recreation, culture and entertainment destinations. We help Wales to host events of international significance that promote the country on the world stage and allow by return the people of Wales access to opportunities for travel and business within our network. We work collaboratively with Visit Wales to help promote Wales in partnership with our airlines across the globe to make it a more attractive place to visit.

3.5 ENVIRONMENT AND SUSTAINABILITY

The provision of infrastructure fit for current and future generations, which will help to facilitate the development of Cardiff Airport through improving access to communities, culture, employment and natural resources, will help promote and protect Wales' place in the world. As such, we will make the Airport and the way people visit the Airport more sustainable.

We propose to support an integrated and sustainable low-carbon transport infrastructure. We will deliver increased choice for those who work at, visit and use the Airport; offering phased active travel links, electric bus infrastructure, electric bikes for hire, electric vehicle charging points and bus rapid transit links to the planned campus.

In addition, a sustainable and long-term approach to development is envisaged, utilising solar technology, sustainable building materials and cleaner technologies.

3.6 BUSINESS AND ECONOMY

Our proposals seek to make Cardiff Airport more competitive and attractive to the people of Wales, as well as the South West of England and beyond. By engaging with current and potential customers, we aim to help shape our future plans for the Airport to help increase its use and value to Wales.

We want to make the Airport an important UK gateway to international travel and trade. As such, we intend to deliver a complementary land use strategy to support the primary aviation and connectivity function of the Airport, with supporting business, innovation and commercial related uses. This includes our planned expansion of cargo facilities and services, as well as a new business and education campus.





We believe that a successful airport is important to connect people with key visitor attractions, including tourism, leisure, recreation, culture and entertainment destinations.

4 NEED FOR A MASTERPLAN

4.1 POLICY CONTEXT

UK Government recommends that all airport operators set out their future ambitions for growth in a masterplan. This is achieved by engaging with stakeholders, including local communities, prior to publication. This Masterplan has been informed by public engagement and in accordance with the UK Government Aviation Policy Framework 2013, which states that adopted masterplans should provide a clear statement of intent on the part of an airport operator to enable future development of the airport to be given due consideration in local planning processes. They also provide transparency and aid long-term planning for users, investors and other businesses.

Masterplans will not have any statutory basis unless they are subject to the relevant plan making provisions. In Wales, finalised masterplans should be published and disseminated to the relevant authorities where they will inform the preparation of the Local Development Plan. Engagement with the Vale of Glamorgan Council has helped inform the development of the Cardiff Airport Masterplan and it is intended that it be adopted as Supplementary Planning Guidance to help update the Local Development Plan.

The engagement and stakeholder liaison we undertook in developing the Masterplan represents best practice and demonstrates the Airport's approach to involvement and collaboration as is advocated in the ways of working directed by the Wellbeing and Future Generations (Wales) Act 2015.

4.2 THE OPPORTUNITY

The Airport's aspirations to improve its accessibility, employment and commercial offer within the Cardiff Capital Region aligns with national and local planning policies. In particular, Cardiff Airport and its Enterprise Zone has been identified as a strategic opportunity area, with the national policy framework supporting its expansion and associated development. Being complementary to other investments and initiatives, including the Metro, there is a strong policy case for investing in improved strategic infrastructure, transport connectivity and economic development opportunities at the Airport and its Enterprise Zone.

We envisage that the expansion of Cardiff Airport and its supply chain will help the Cardiff Capital Region achieve its priorities. As such, the success of the Enterprise Zone, Cardiff Capital Region and its City Deal is essential to achieve regionally and nationally significant economic growth and to attract employment opportunities and skills to the region. The Airport Masterplan is an important element of that opportunity, where better connectivity to an international pool of labour, visitors and trade prospects will help create jobs and make Wales a prosperous place to live, work and play.





This Masterplan has been informed by public engagement and in accordance with the UK Government Aviation Policy Framework.



5 CARDIFF AIRPORT TODAY

Cardiff Airport has an important role as an international gateway and as a major driver within the Welsh economy. It supports 1,800 aviation-related jobs at the Airport, whilst directly and indirectly supporting a further 2,675 jobs in the wider area. 30% of our passengers are visitors to Wales and the overall Gross Value Added impact to the local economy is £102million.

Since 2013 the Airport has been wholly owned by the Welsh Government and operated as a commercial business at arm's length as Cardiff International Airport Limited. Much has been done to develop the Airport business to achieve our objective of creating an outstanding capital city airport with a wide range of aviation facilities of which Wales and the UK can be truly proud. We want Cardiff Airport to become a central part of the national success story – a symbol of Wales' global ambition.

5.1 LOCATION AND CONTEXT

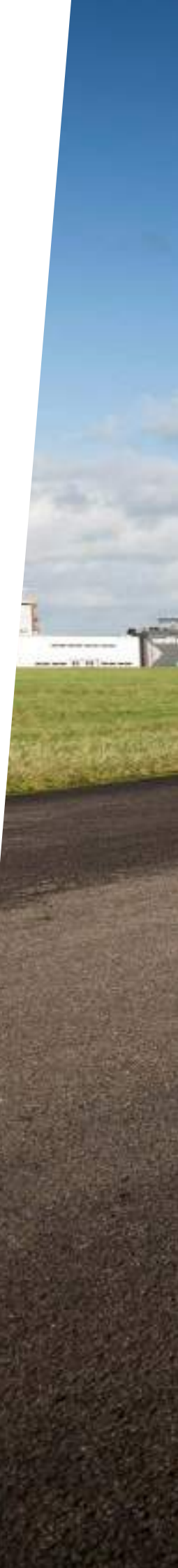
Cardiff Airport is located around 9 miles south-west of Cardiff city centre, 3 miles west of Barry, and 3 miles east of RAF St Athan. The site is on a gently sloping plateau lying between the Vale of Glamorgan countryside and the coast. The airport is bounded by the village of Rhoose to the south and the A4226/B4265 to the north.

Cardiff Airport lies approximately 10 miles from Junction 33 of the M4, which connects east and west across South Wales and towards London. The primary access to the site from both east and west is via the A4232 to Culverhouse Cross, A4231, A4050 (Port Road East/West) and A4226 (Port Road). This route also serves as the signposted route into Barry and to Barry Island and can get congested at peak times.

There is a secondary route via the A4232, A48, A4226 Five Mile Lane (Waycock Road) and A4226 (Port Road). Welsh Government is funding works to Five Mile Lane (A4226) between Bonvilston and Barry to improve reliability of journey time between Culverhouse Cross and Cardiff Airport, discouraging use of other routes that have a greater impact on residents and businesses. The works are due to run between December 2017 and Summer 2019 and will incorporate improvements for pedestrians, cyclists and bus services.

Entry to the Airport site is managed by type and destination – customers and staff follow a one-way route, arriving via a roundabout on Port Road before either turning into Long Stay 1 or continuing westwards towards the terminal and other car parks, leaving the site at the A4226/B4265/ Tredogan Road Roundabout. This route is shared by Cardiff and Vale College (CAVC) and the airport business park and links into Tredogan Road. There is an alternative entry from the A4226 roundabout. HGVs and cargo enter and exit the site via the Port Road/Porthkerry Road roundabout.

Access to the areas south of the runway is via Rhoose Road, a narrow residential road with on-street parking.





The airport is arranged with one central runway with passenger, cargo and MRO facilities to the north and east, and ancillary airside facilities to the south of the runway.

5.2 SITE CONTEXT

CARDIFF AIRPORT

- A** Passenger terminal
- B** Cargo terminal
- C** Runway

WIDER AREA

- 1** Cardiff and Vale College
- 2** Airport Business Park
- 3** Holiday Inn
- 4** Rhoose Cardiff International Airport station
- 5** Meet and Greet
- 6** Long Stay 4
- 7** Vale Park Hotel
- 8** Porthkerry Country Park
- 9** Porthkerry Viaduct
- 10** Fonmon Castle
- 11** Long Stay 1
- 12** Long Stay 2
- 13** Long Stay 3
- 14** Celtic International Hotel
- 15** Travelodge Cardiff Airport

PENMARK

TREDOGAN RD

B4265

13

12

5

C

RHOOSE RD

FONT-Y-GARY

FONT-Y-GARY RD

4

RHOOSE



FIVE MILE LN

15

A4226

A4226

ENTERPRISE ZONE

TREDOGAN RD

1

2

11

B

A

3

6

7

14

PORT RD

ENTERPRISE ZONE

PORKHKERRY

9

8

BARRY

PORKHKERRY RD

VALE OF GLAMORGAN LINE

BRISTOL CHANNEL

In addition to the passenger terminal, the Airport site houses a number of additional non-passenger operations including:

- A cargo facility to the north-east of the passenger terminal, with direct access from the Porthkerry Road/Port Road roundabout – currently handling approximately 1,000 tonnes of cargo per year with potential to grow
- The British Airways Maintenance Cardiff (BAMC) facility at the north-west corner of the site providing the main maintenance base for all British Airways' Boeing fleet operations
- A single large hangar with room for three wide-bodied aircraft, an apron connected to Taxiways Echo and Bravo, a ground run pen (GRP), and its own dedicated car park and servicing area, accessed via Dragonfly Drive
- Private aviation hangars to the south-accessed via Rhoose Road.

Immediately to the east of the Airport boundary is the CAVC International Centre for Aerospace Training (ICAT), which runs apprenticeships and trainee courses with progression onto the college's degree course, run in partnership with Kingston University. To meet growing demand the college plans to extend its facilities, accommodating additional students and more training opportunities. Other facilities adjacent to the Airport include the Holiday Inn, providing 111 beds, and Porthkerry Country Park.

5.3 PUBLIC TRANSPORT AND PARKING

5.3.1 Public Transport

The Airport is served by Rhoose Cardiff International Airport railway station which lies a 3.3km journey from the terminal, on the Vale of Glamorgan line. The station has two platforms with basic shelter facilities, staggered either side of Station Road, and a small car park. A shuttle bus (service 905) meets each train and links the station, the Airport and St Athan. There is currently an hourly half hour rail service direct to Cardiff Central station and one service west to Bridgend every hour.

The Airport is served by the T9 bus service, linking it to Cardiff city centre, Cardiff Bay and northern/eastern Barry up to every 20 minutes, with a journey time of around 35 minutes. Other services link the Airport to destinations in the Vale of Glamorgan.

The completion of the electrification of the Great Western Mainline will reduce journey times to London, connecting the communities of the Capital Region, driving economic growth and facilitating regeneration. Electrification of the Valley Lines will provide a larger employment catchment for businesses located in the Enterprise Zone.

Access to the Airport is expected to be improved as part of the Cardiff Capital Regional Metro. This will form a multi-modal rapid transit network, with the potential to generate £250m each year and 7,000 new jobs through a range of interventions, including new stations, routes and development of light rail and bus rapid transit.

5.3.2 Pedestrian and Cycle

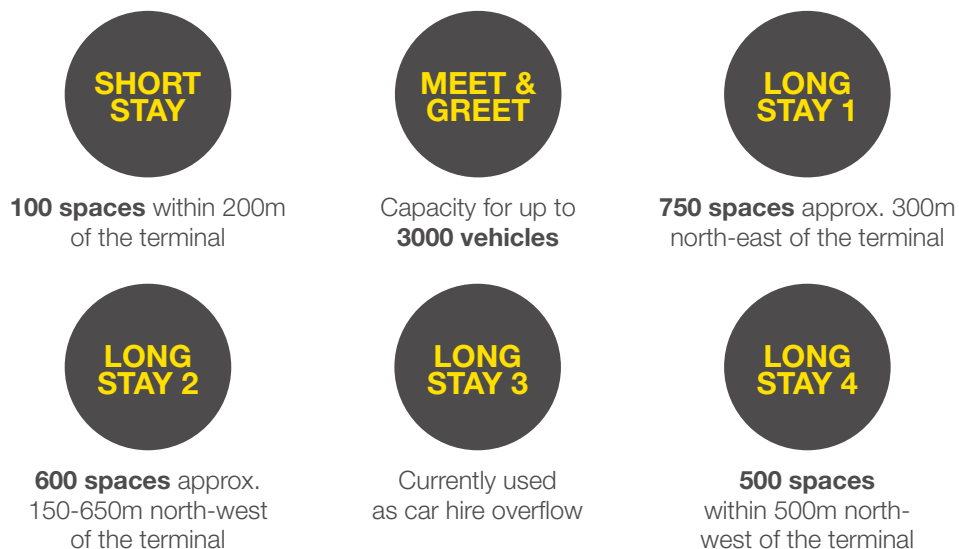
The Airport lies close to the Wales Coast Path with several coastal destinations, including Llantwit Major, Porthkerry Country Park and Barry Island within easy reach. The Valeways Millennium Heritage Trail runs along the western boundary of the site, linking south to the Coast Path and westwards across the Vale. The proposed cycle route NCN 88 would pass along Tredogan Road and create an east-west link between Margam Park and Newport.

Pedestrian access between the terminal and neighbouring settlements is currently limited, with no formal pavement between the Airport and Barry (Port Road) and no facility along the A4226/ B4265, though a pavement does run parallel with Porthkerry Road to Rhoose.

Within the site, all roads have a formal pavement either side and there are Zebra/Pelican crossings close to Short Stay and Long Stay 1 car parks.

5.3.3 Parking and Drop Off

The airport site is served by several visitor car parks (see below) and one staff car park:



A free drop-off area is provided outside the terminal building. Pick up is permitted from the Pick-up zone located adjacent to the Short Stay Car Park. There is a hire car facility and taxi service available. Drop-off and pick-up points for public transport are within 20 metres of the terminal entrance. There are dedicated bus stop spaces provided for public services, catering for the following:



5.4 CURRENT AIRPORT OPERATIONS

5.4.1 Passenger Operations

Since 2014, the Airport has seen continued year-on-year growth in passengers, rising to 1.5 million passengers during 2018, a growth of 8% on the previous year. There has been over 50% growth in passenger numbers since the change to Welsh Government ownership in 2013.

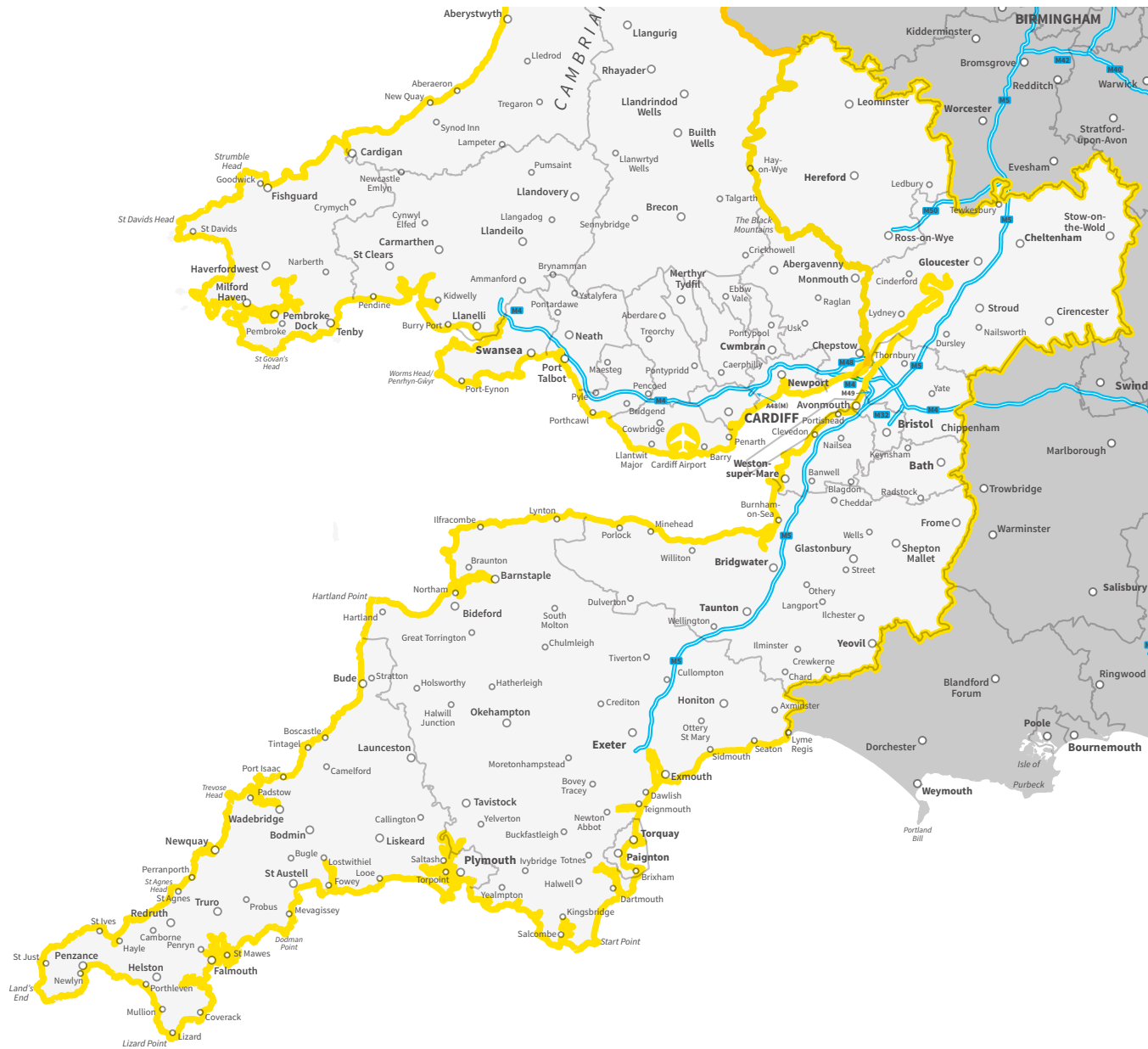
18 airlines regularly use the Airport, many of which have added more capacity on existing routes and introduced new destinations. We currently serve:

- over 50 direct routes
- over 900 connections

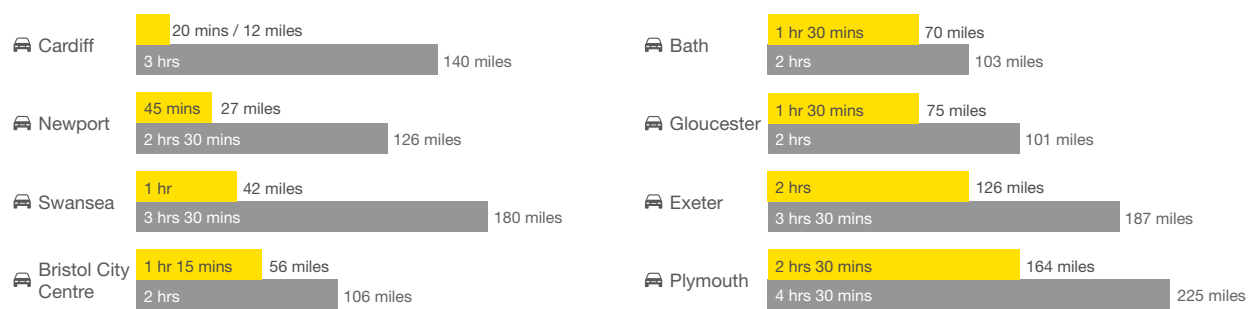
In terms of our market, the core catchment area within Wales stands at a population of 2.4 million with an outer catchment area of the South West of England of a further 4 million.

Our facilities include an operation and runway which are active 24/7 enabling us to accommodate many aviation and aerospace companies and related services, including British Airways Maintenance Cardiff (BAMC) and Cardiff Aviation Training Centre.

CURRENT PASSENGER CATCHMENT



Cities and towns will benefit from reduced journey times, for example:



* Comparator to travel distance to London Heathrow

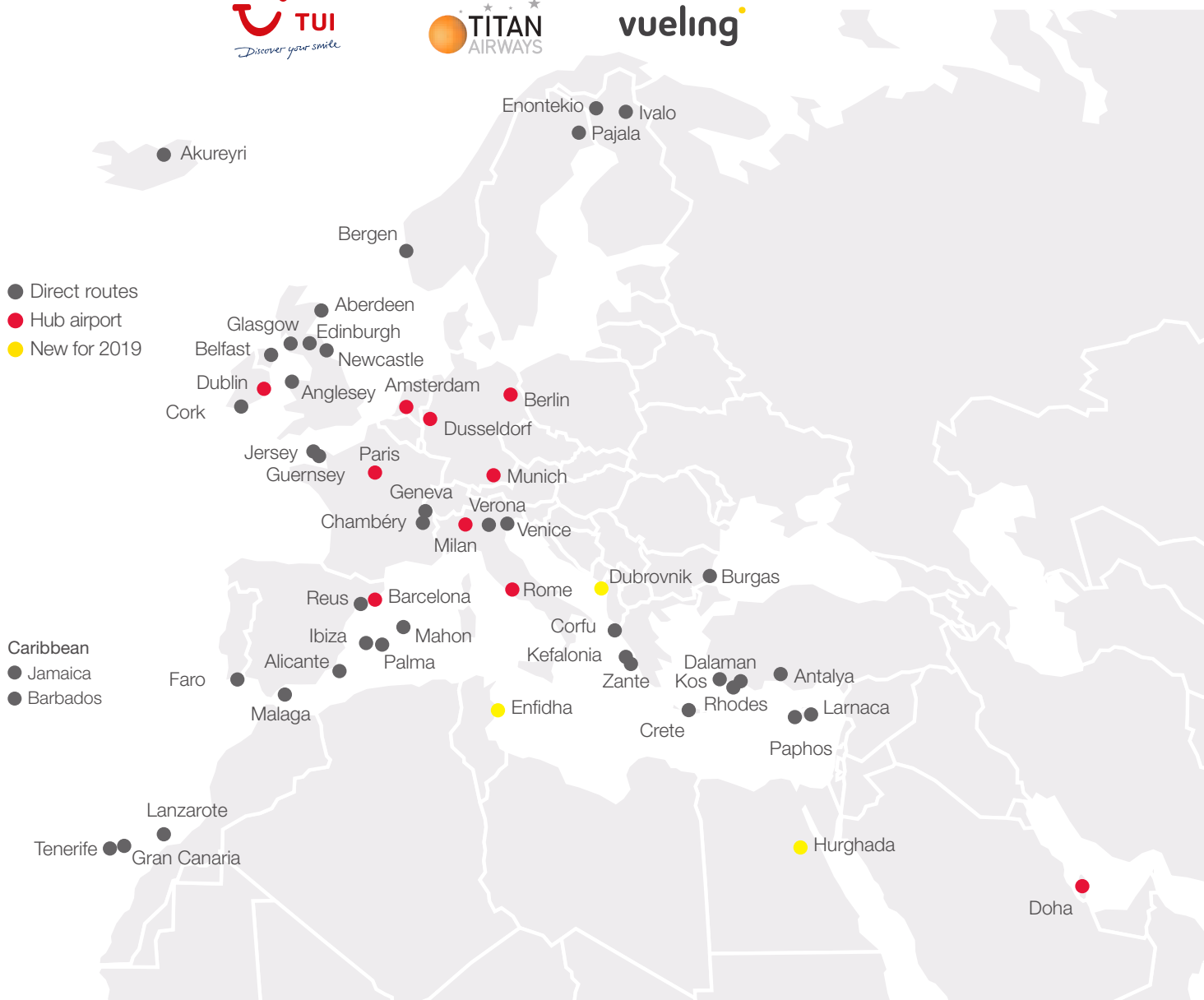
Source: Population estimates, ONS

5.4.2 Destinations and Operators

Flights are predominantly to western/central Europe and Mediterranean destinations and comprise a mix of short-haul business travel, city break and package holiday destinations.

Amsterdam Schiphol and Paris Charles de Gaulle airports are key transfer hubs for Cardiff Airport, providing onward travel to a significant number of long-haul destinations. Since May 2018, Qatar Airways has been running a regular direct service from Cardiff to Doha. This links Wales and the South West to a significant hub airport and opens up long-haul routes to the Middle East, Asia, Africa and Australasia.

The Airport's airlines are:



5.4.3 Passenger Facilities

The Airport has one passenger terminal with connecting operational facilities, which accommodates activities across multiple floors as follows:

- Arrivals, check-in desks and operational facilities on the ground floor
- Departures on the first floor
- Additional operational and occupier facilities on the smaller second, third and fourth floors.

The terminal building was originally built in the 1970s with updates and extensions added over time. Given its history, the layout, fabric and technology within the terminal, the building is dated and inefficient for modern airport demands and requirements.

Since 2013 Cardiff Airport has invested significantly in the customer experience to improve facilities. The most recent £4 million investment during 2017/18 in the improvement of the customer experience has seen developments to both the terminal and the Airport's surrounding infrastructure.

Within the terminal these include:

- **Additional seating** in the departure lounge for passengers to relax before travelling, with stunning views of the runway
- **The relocation and extension of the WH Smith store** in the departure lounge. The store now offers many more products including a Well Pharmacy range
- **Two new Costa Coffee branches**, one in the arrivals hall and a larger café for passengers in the departure lounge, offering a selection of healthy snacks, hot food options, sweet treats and hot beverages
- **A new look Executive Lounge** and a brand new business lounge, renamed the 51° Lounge
- **An upgrade to the hold baggage screening system** to meet enhanced security requirements.

Further improvements to Cardiff Airport's surrounding infrastructure include a brand new meet and greet facility for customers, an additional long stay car park (4) and the opening of a new car hire centre, which is located close to the main terminal and is a base for EuropCar, Enterprise, Hertz and Avis, to welcome visitors to Wales.

Future committed projects include:

- Installation of bag drop kiosks
- Installation of automated check-in desks
- Improvements to the central search security area, including a new tray return system
- Installation of additional driveable airbridges to gates 7 & 9.

5.5 AIRSIDE FACILITIES

Cardiff Airport is arranged with one central runway with passenger, cargo and MRO facilities to the north and east, and ancillary airside facilities to the south of the runway.

5.5.1 Stands

The Airport has 17 aircraft stands for commercial flights:

Stand	Aircraft Code	Position	Stand	Aircraft Code	Position
1, 2, 3	C	Contact (walk up)	8R	C	Contact (walk up)
4	C	Remote (bussed)	8	B	
5	D		9	D	Contact (walk up)
6	E		10	D	Contact (airbridge)
7	E	Contact (airbridge)	11-14	C	Contact (walk up)
7L	D	Contact (walk up)	15-17	C	Remote (bussed)

5.5.2 Runway

Runway 12/30 is 2,354m in length and 45m in width and runs in a north-west to south-east direction. Runway 12/30 is classed as a Code E runway and has a Category 1 instrument landing system, allowing use for up to Code E Category Aircraft.

The runway is able to operate 7 days a week 24 hours a day, with zero slot constraints.

There are 6 taxiways, with Alpha, Bravo, Delta and Echo to the north of the runway and Golf and Hotel to the south.

5.5.3 Air Traffic Control

The Airport's existing air traffic control tower is located within the administration facilities area linked to the terminal building, providing uninterrupted views across the airfield. Radar facilities are located to the south of the runway, west of Taxiway Golf.

The airspace around the Airport is currently managed by National Air Traffic Services Ltd (NATS).

5.5.4 Ancillary Facilities

The Airport includes a number of essential ancillary facilities.

- **Airport fire station:** The Airport has a dedicated 24hr fire station located next to the southern boundary, east of the Rhoose Road entrance. From this location, the fire-fighting team can access any part of the site within 5 minutes, subject to aircraft movements. There is a fire training facility located next to the radar site.
- **Airport Training Centre:** Located south side with specialist training facilities available for fire & rescue and health & safety.
- **Fuel farms:** There are two fuel farms on site, one located on a 0.8 hectare site to the east of the terminal, the second is located on the south side. Both have direct access to the apron.
- **Waste Recycling Centre:** Located on the north side of the terminal and we are proud to be recognised as a working towards being a zero waste to landfill Airport.

THE AIRPORT SITE



6 CARDIFF AIRPORT MASTERPLAN 2040

The development strategy for the Masterplan has been designed to be flexible to accommodate changes in passenger demand and carrier needs. The following principles set out a guide for the expansion and improvement of the Airport that the Masterplan seeks to promote:

1. A new terminal, focused on optimising the customer experience and providing a distinctive welcome to be designed and orientated to allow interface with the Enterprise Zone and potential business and commercial developments
2. Replacement aircraft parking stands to be provided for a mix of aircraft, including contact and remote stands
3. A new cargo terminal
4. New dedicated road access to be provided for the terminal from the A4226, separating Airport traffic from other uses, including surface connectivity to the Enterprise Zone
5. Improvements to pedestrian and cycle access to and through the Airport site, including links to Rhoose and Barry
6. Future integration with the Metro with a safeguarded bus link as well as an improved, dedicated connection between the terminal and Rhoose Cardiff International Airport railway station to improve the transfer experience
7. Open space, public realm and landscaping improvements
8. Safeguarded land for expansion
9. Improved rail links.

The Masterplan illustrates how all of these elements can be integrated within an enlarged airport boundary.

Artist's impression





*We aim to enhance our unique identity
as the gateway to Wales, creating a
memorable first and last impression.*



CARDIFF AIRPORT MASTERPLAN 2040

- Cardiff Airport boundary
- CIAL land ownership
- Airside boundary
- ✈ Terminal
- 1 Passenger arrival zone
- 2 Terminal servicing area
- 3 Hotel
- 4 Public transport hub
- 5a Multi-storey car parking with drop-off/pick-up
- 5b Surface car park
- 6 Cargo
- 7 BAMC/ MRO
- 8 Improved operational facilities
- 9 Fire station
- 10 Fuel Farm
- 11 Airport expansion area
- 12 Airport Campus (business, commercial and education)
- 13 Enhanced public transport link to station
- 14 Potential rail link (LDP MG10)
- 15 Possible future Runway Extension
- ⇌ Enhancements to existing Rhoose Cardiff International Airport station

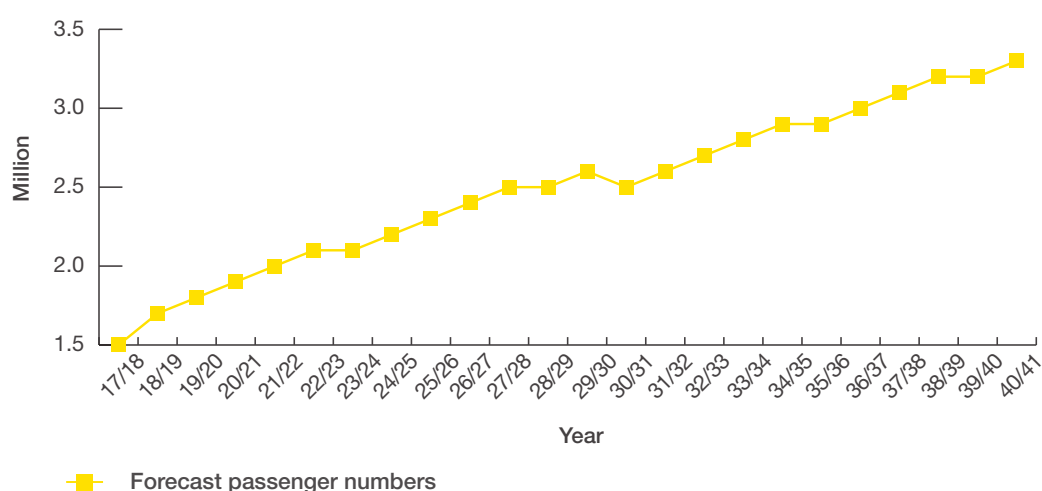




SCALE OF GROWTH

We have used an analysis of future forecast demand to help us understand what the requirements will be for the Airport in the next 10 years and then on to 2040. This approach allows us to understand potential demand and to consider the impact of future changes to the Airport. Air travel has been increasing in recent years since the 2008 financial crisis and it is expected that there will be an overall moderate growth in UK airport passengers in the time period that the Masterplan covers.

The long-term forecast for Cardiff Airport indicates that there will be an average growth rate of approximately 3%:



This forecast growth shows that passenger numbers could reach 2.5 million in the next 10 years rising to 3.3 million by 2040.

Over the last 25 years, UK airport passenger numbers have grown at an average of 4% per annum. Growth has tracked the UK's economic performance - passenger volumes dropped during the financial crisis in 2009 by 7% to 221 million, but have since recovered to record highs of 290 million in 2017.

Naturally demand is the primary determinant of the need for future airport capacity and understanding the primary drivers of future travel demand is a part of any aviation forecast. In the coming years and decades some of the trends impacting demand for air travel will include:

- Slowing economic growth in mature and less developed economies
- Population and demographic trends including growth, age profile, increasing incomes, global mobility/dispersion of families
- Continued globalisation and liberalisation of markets, increasing international trade, investment and the growth of international tourism.

Cardiff Airport is part of the wider UK aviation market, and supply side factors such as carrier deployment can play a significant part in any individual airport's performance.

Looking ahead, the fundamental trends of ongoing demand growth from Cardiff Airport's wide catchment will support increased passenger volumes in the future. The Airport has the potential to capture a greater share of this demand through increased levels of service and support.

These long-term forecasts have been prepared reflecting long-term growth trends, supply side factors as well as wider national impacts including London Heathrow's third runway (assumed in 2030).

By achieving this growth, we will maximise the contribution that the Airport makes to the economy of Wales. Expansion means that more jobs will be supported by the Airport, both directly (in airside and landside functions) and within the broader aviation supply chain. The broader Masterplan and the establishment of an Enterprise Zone creates the conditions required to attract and grow aviation and related businesses. Furthermore, airports and the connectivity they provide have a range of catalytic economic benefits. Connectivity by air is associated with higher productivity and GDP. Expanding the Airport's route network will help to foster trade, enable businesses to access markets further afield, and attract higher value inward investment, whilst also supporting Wales' important tourism industry.

Key features and design considerations include:

INTERNATIONAL GATEWAY

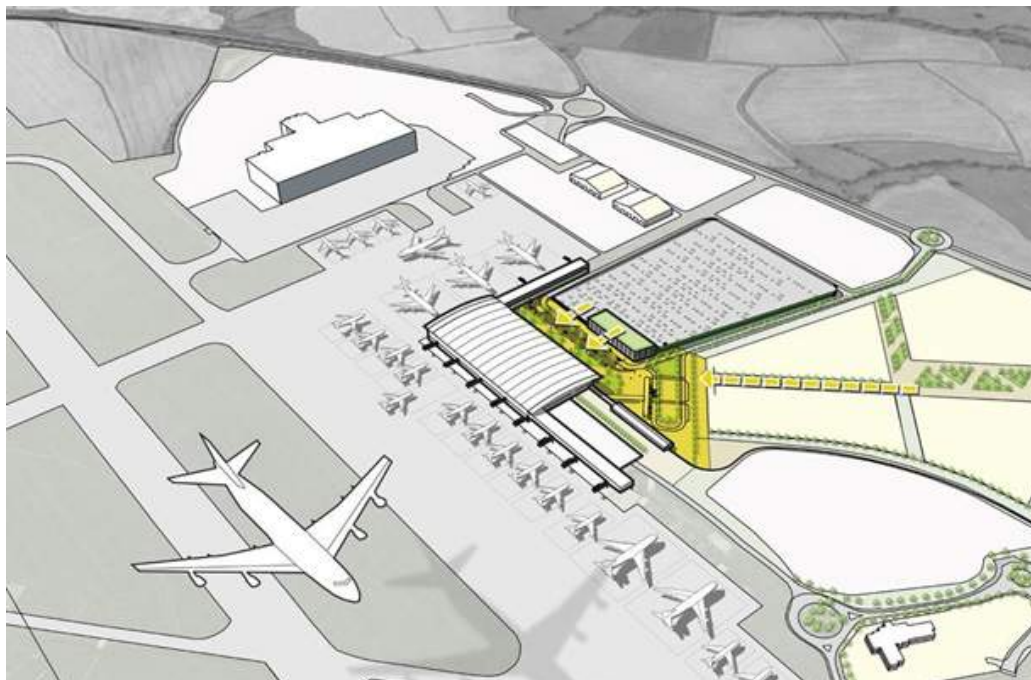


The needs of passengers are evolving and Cardiff Airport aspires to create a best-in-class international gateway to meet the needs of current and future generations. To achieve this, additional passenger stands and cargo facilities are proposed. The increased capacity of the Airport will enhance its role as an international gateway to the UK.

We aim to:

- Deliver greater capacity to grow to three million passengers per annum and beyond
- Attract new airlines, secure new routes and more choice for customers travelling to and from the region
- Diversify the Airport business to create and develop opportunities for aviation, cargo, education, technology and innovation
- Build upon the Airport's efficient, safe and secure 24/7 operation.

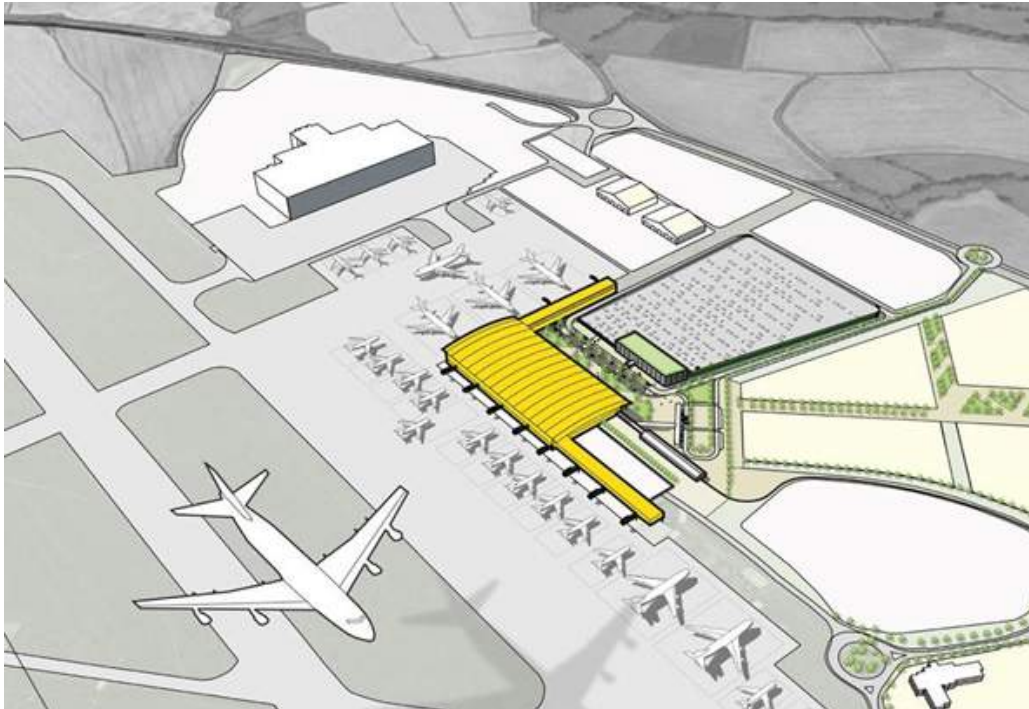
A UNIQUE PLACE



The Airport is uniquely located between coast and countryside with views around the Airport showcasing Wales' unrivalled coastal and countryside scenery. High-quality public realm in front of the Airport terminal will enhance this wider offer and create a gateway to the Airport campus. The activation of the Enterprise Zone will create a vibrant place for people to learn, work and enjoy. This will include a range of local community uses as well as facilities for visitors, businesses and learning. The Masterplan includes plans to:

- Create a public realm for the community to enjoy
- Excite customers before departing and when arriving in Wales, creating a sense of place and awareness of the Welsh culture
- Link businesses across the Airport campus, supporting the region and Enterprise Zone
- Support education with a place to learn and innovate.

NEW TERMINAL



Creating a new terminal with a phased delivery alongside the existing operation, will limit disruption to customers and allow for a seamless transition. A new, modern and fit-for-purpose terminal will enable us to operate more efficiently with the benefits of improved energy consumption and use of resources. The terminal will benefit from better connectivity within, to and from the site, integrate new technologies and create a space that provides a unique and appropriate entry and exit point to and from Wales and the UK.

We will:

- Enhance our unique identity as the gateway to Wales, creating a memorable first and last impression
- Ensure ease of access for all
- Enhance our customer experience with best-in-class facilities
- Develop our 'green' credentials to meet our environmental and social commitments.

NEW 4* HOTEL

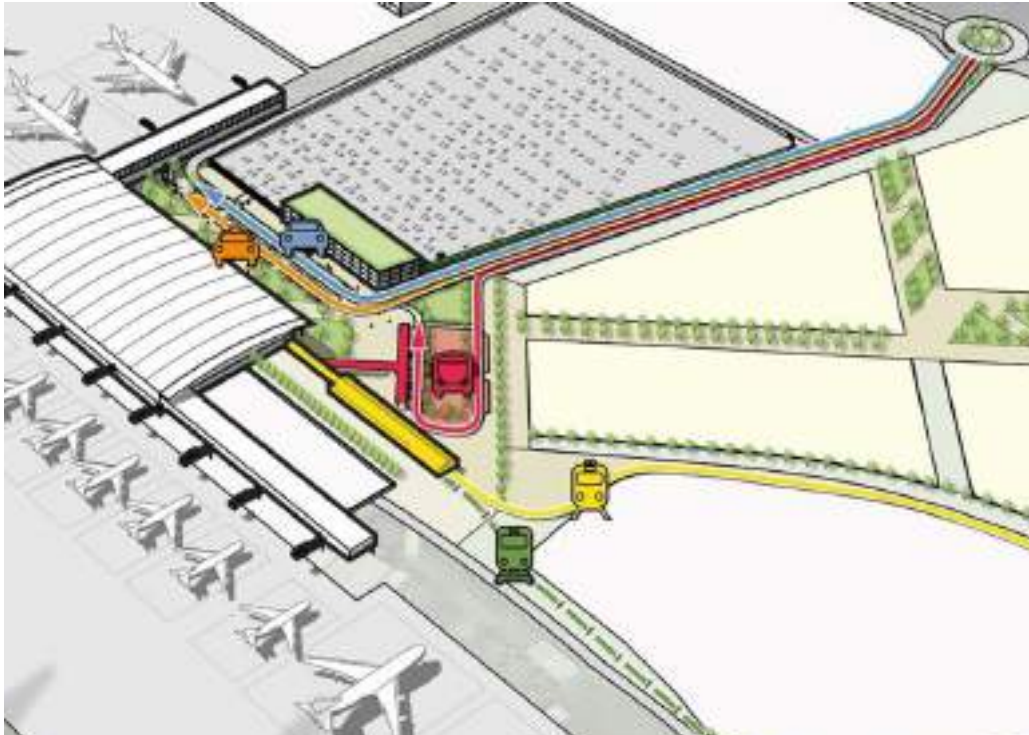


By aspiring to meet the needs of a best-in-class airport, we will need to improve the facilities that support it. This includes the convenience of a high-quality hotel close to the terminal that can provide not only places to stay, but also a space that allows for business use and conference facilities. The hotel will be positioned adjacent to the multi-storey car park allowing ease of access and convenience.

We will:

- Develop the first on-site hotel
- Offer more choice in local accommodation for customers
- Offer business meeting and conference facilities
- Provide a convenient base for visitors to explore the region.

NEW TRANSPORT HUB & CAR PARK

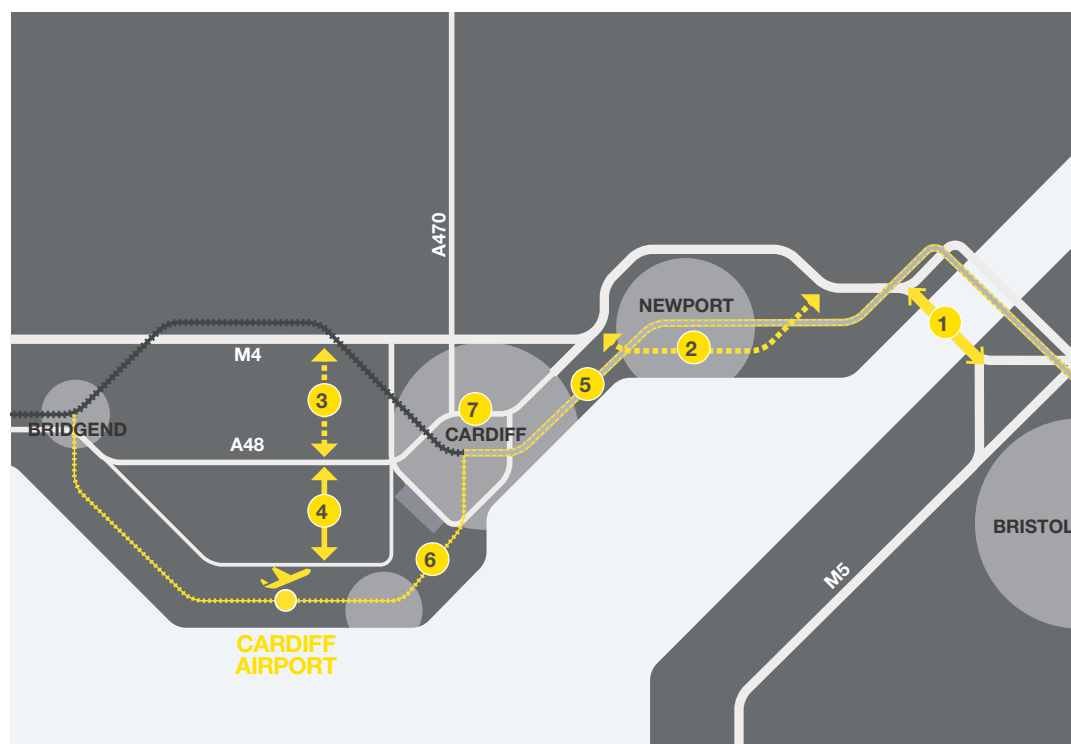


A new transport hub adjacent to the Airport campus will provide improved bus facilities at the Airport and shorter walk times between car parks and the terminal. It could link into Metro/light rail connections in the future. A single, rationalised multi-storey car park adjacent to the hub releases land currently occupied by surface car parks and provides a streamlined experience for visitors arriving by car. The arrival experience will be enhanced by high-quality signage, digital interfaces and a covered walkway to provide comfort in all weathers.

We will:

- Offer greater travel choice for customers, the community and the Airport team – car, bus, rail, taxi, car hire and active travel
- Offer an improved integrated transport facility
- Develop a new multi-storey car park close to the terminal building
- Offer new services to enhance the customer experience.

SURFACE ACCESS



Convenient and quick access to and from The Airport to major towns and cities and national infrastructure connectivity such as motorways and mainline rail, is critical, not only to the growth of the Airport business, but also the ancillary activity that we expect to see continue to grow and develop around the Airport site. Within this Masterplan we acknowledge the full range of surface access proposals currently underway or in progress, which have a benefit to the wider region, but will also benefit the Airport.

These include:

Surface Access	Status
1 M4 Severn Crossing toll removal	In progress
2 M4 Newport relief road	Proposed
3 M4 Pendoylan link road	Proposed
4 Five Mile Lane improvements	In progress
5 Great Western mainline improvement	In progress
6 South Wales Metro development	In progress
6 Rail frequency enhancements	Proposed
7 Express bus connectivity	In progress

7 PARTICIPATION RESPONSE

A draft Masterplan was launched alongside a non-statutory (informal) public engagement exercise on 18 July 2018, to set out, and encourage feedback on, Cardiff Airport's aspirations for growth and development up to 2040.

We raised awareness of the engagement exercise, and the opportunity to feedback on the proposals for Cardiff Airport, using a range of broadcast and social media with a reach of over two million people.

The draft Masterplan was shared on a dedicated part of the Cardiff Airport website along with additional information, promotional materials and an online questionnaire. Around 6,000 people viewed the website between the launch of the engagement exercise on 18 July 2018 and 30 September 2018, when the Airport closed the window for responses on its draft Masterplan.

Organised engagement events, including a workshop, high-profile breakfast launch and public information exhibitions with presentations and Q&A sessions were attended by around 180 people. In addition, around 60,000 impressions were made across social media posts about the draft Masterplan.

Around 358 people submitted their comments using Cardiff Airport questionnaires, or by other paper and online methods including letter and email. The key issues and opportunities have been identified and are listed in the table below.

KEY ISSUES AND OPPORTUNITIES

Topic	Key Issues and Opportunities
Environment	Concerns raised that the proposed Pendoylan Link Road would detrimentally impact the rural environment, including local wildlife and ancient woodlands
Airport & Commercial	Suggestion raised that Cardiff Airport should provide a better range of flight routes, including long haul, transatlantic and domestic routes
Principle of Development	Support for improvements to be made at Cardiff Airport
Economic	Support for the proposed development of the Cardiff Airport Masterplan and airport improvements attributed to economic growth in Wales
Airport & Commercial	Suggestion raised that Cardiff Airport should competitively price flights in comparison to alternative airports to increase passenger numbers
Public Transport	Suggestion raised that the proposed development should enhance the public transport connections to Cardiff city centre as part of the Masterplan
Social	Concerns raised that the proposed Masterplan and associated works would detrimentally impact quality of life for rural communities
Employment	Support for the proposed development of the Masterplan due to increased job opportunities
Public Transport	Suggestion raised that an improved direct rail link should be provided to connect Cardiff Airport with the city
Surface Access	Concerns raised that the proposed surface access road links would be ineffectual due to suitable alternatives available at present

RESPONSE TO KEY ISSUES

Environment

Issue: Concerns raised that the proposed Pendoylan Link Road would detrimentally impact the rural environment, including local wildlife and ancient woodlands

The Pendoylan Link Road is promoted via the Vale of Glamorgan Council (not Cardiff Airport) and represents a route important for the wider socio-economic growth of the local authority area; access to the M4 is an important consideration for both the Vale of Glamorgan and the airport's future growth. Vale of Glamorgan Council will consider the environmental impact specific to this scheme as part of the WeITAG assessment process.

Airport & Commercial

Issue: Suggestion raised that Cardiff Airport should provide better range of flight routes, including long haul, transatlantic and domestic routes; suggestion raised that Cardiff Airport should competitively price flights in comparison to alternative airports to increase passenger numbers

There is a dedicated team (as part of Cardiff Airport International Ltd.) working to achieve these strategic commercial objectives (including flight routes, options and frequency) in the best possible manner, particularly as the Airport undergoes development.

Transport

Issue: Suggestion raised that an improved direct rail link should be provided to connect Cardiff Airport with the city

The draft masterplan presented a possible extension of the rail link. Cardiff Airport will continue to explore potential options for rail access to the airport; this will be pursued under the Local Development Plan Managing Growth Policy (MG10 6.5.7).

Issue: Suggestion raised that the proposed development should enhance the public transport system to connect to Cardiff city centre as part of the Masterplan

The Airport continues to support better accessibility by sustainable travel modes; this includes working with the council to provide improvements to walking and cycling facilities and to improve public transport provision. The airport is actively working on its surface access strategy and how best to balance the needs of its customers.

Social – Residential Amenity and Health

Issue: Concerns raised that the proposed Masterplan and associated works would detrimentally impact the quality of life for rural communities

Vale of Glamorgan Council will consider the social impacts specific to this scheme (the proposed Pendoylan Link) as part of the WeITAG assessment process. In addition, Cardiff Airport monitors the impacts of noise and air pollution as part of its ongoing commitment to minimising its impact on the environment and local community.

8 NEXT STEPS

This Masterplan has set out our vision for the future of Cardiff Airport through to 2040. The next steps on our journey require the continued development of our approach to being a sustainable airport business supporting a connected and prosperous Wales. We will continue building on our success to date and engage with interested parties at the right time.

Our initial next steps on our journey to 2040 will be:

- To ensure that Supplementary Planning Guidance for the Enterprise Zone will take account of Cardiff Airport's requirements identified in this masterplan
- Undertake noise studies to understand future scenarios with increased freight operations and increased use of 24/7 hours
- Explore funding for Airport Masterplan elements including business case development
- Commission a cargo study to identify opportunities for additional freight capacity
- Commission a surface access study.

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9 APPENDICES



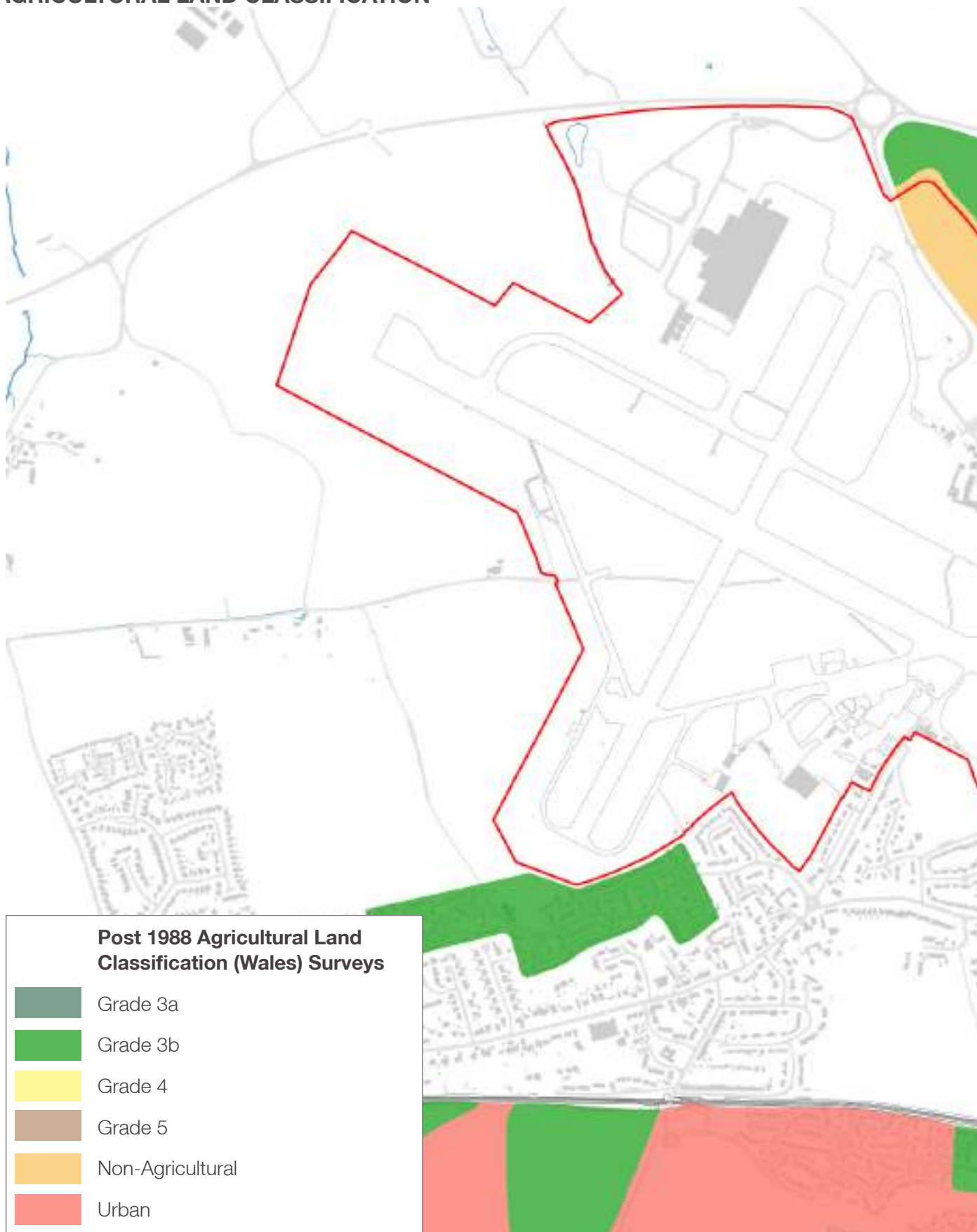


TOPOGRAPHY



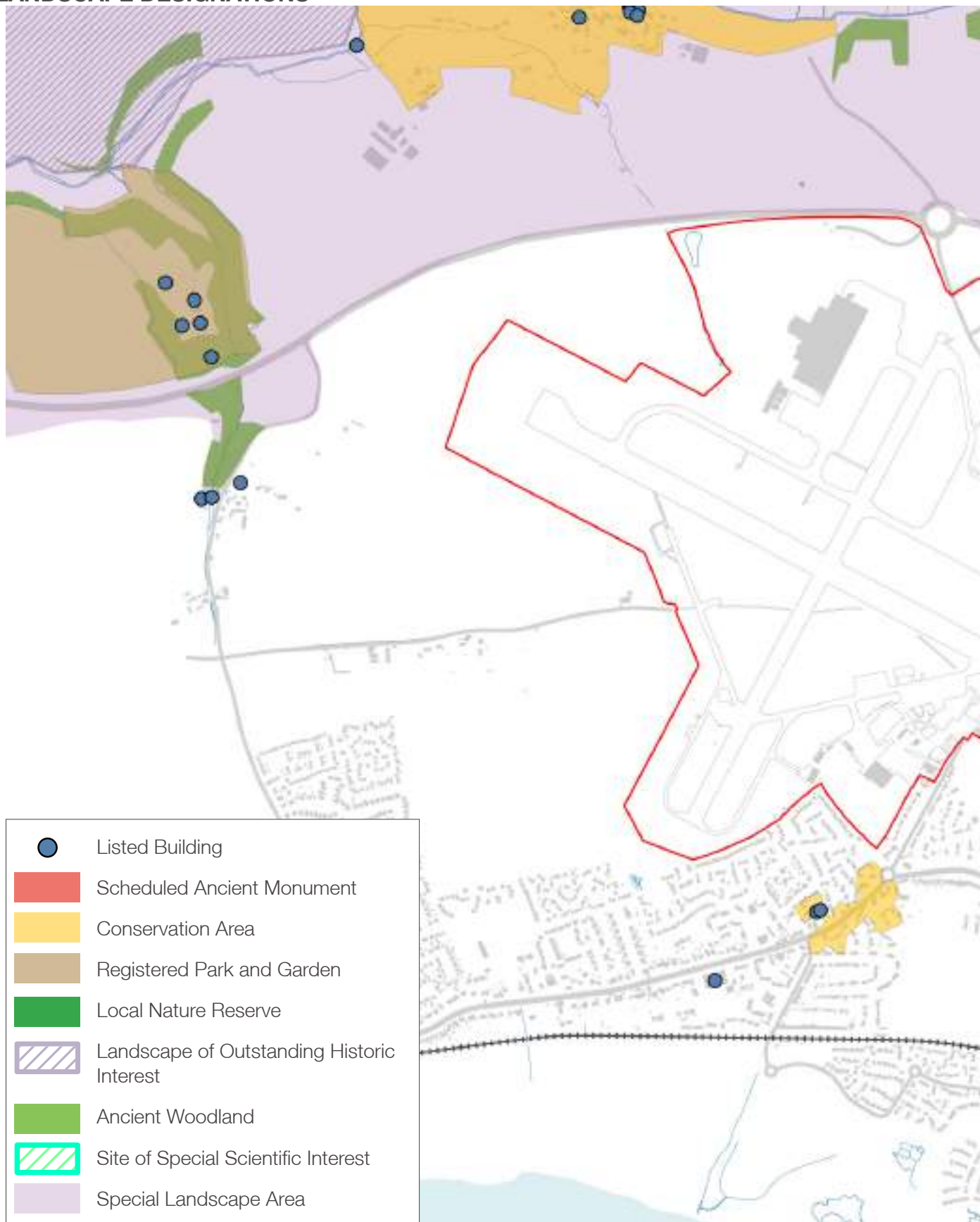


AGRICULTURAL LAND CLASSIFICATION





LANDSCAPE DESIGNATIONS



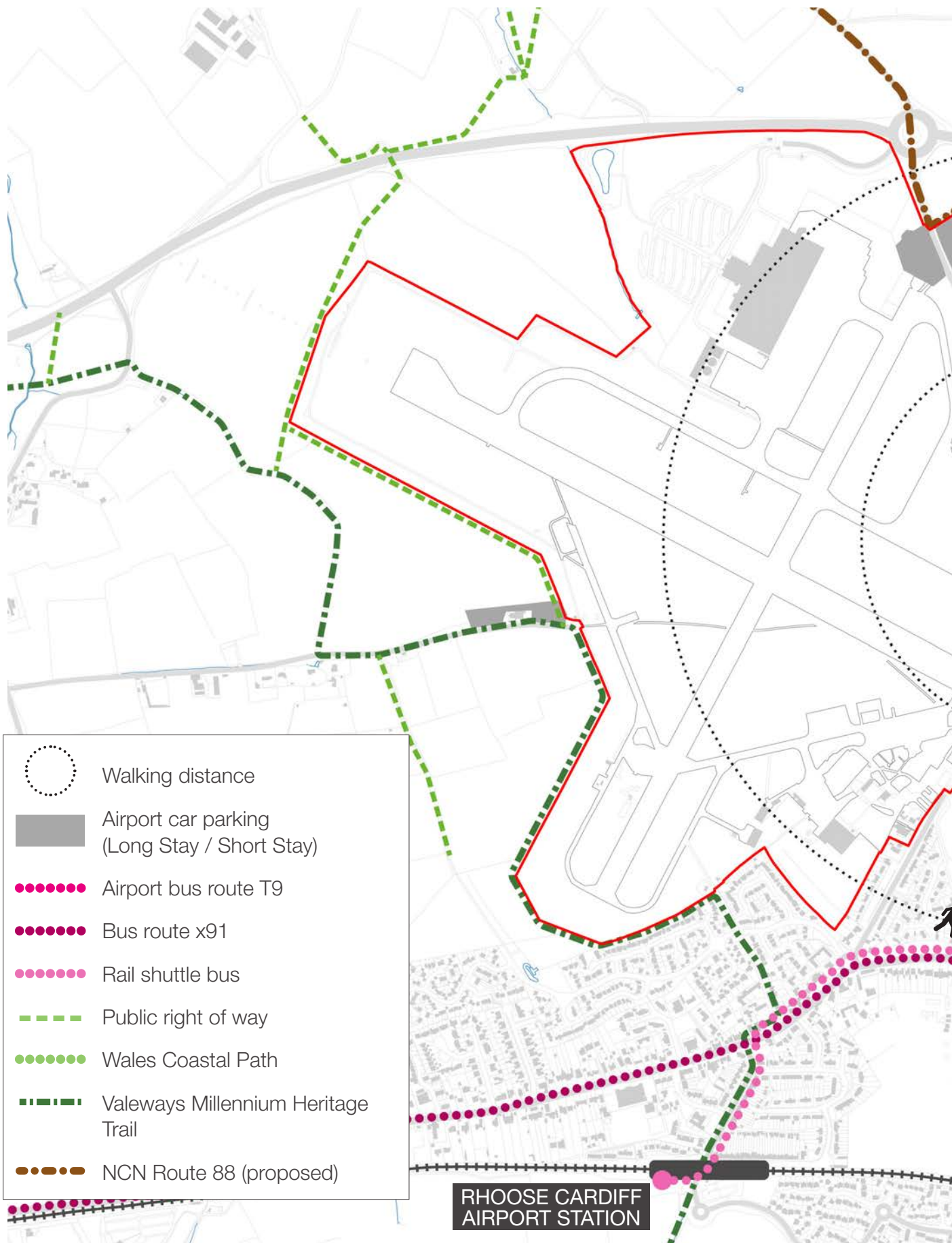


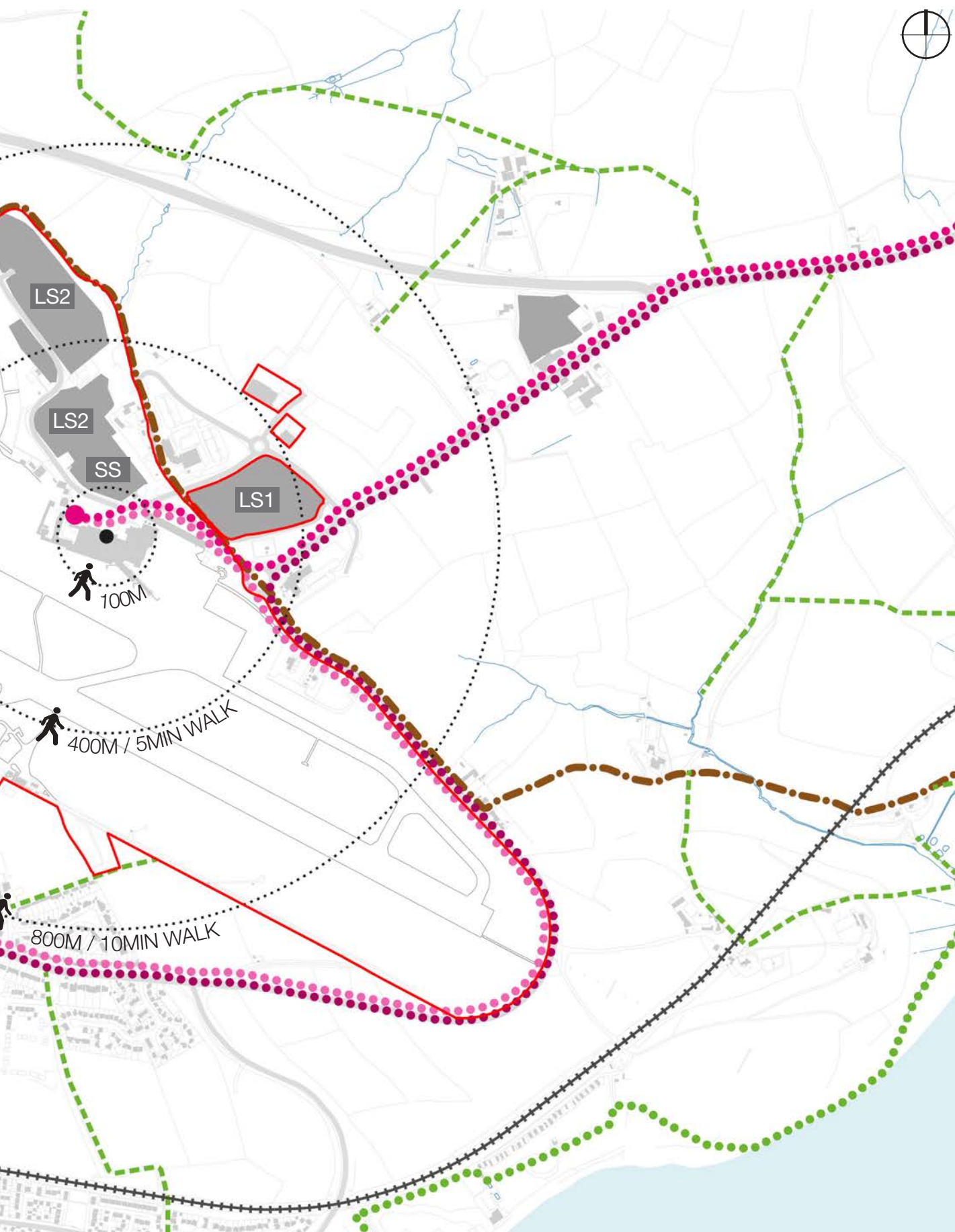
FLOOD ZONES





PEDESTRIAN / CYCLE AND PUBLIC TRANSPORT ACCESS





ROAD ACCESS

