

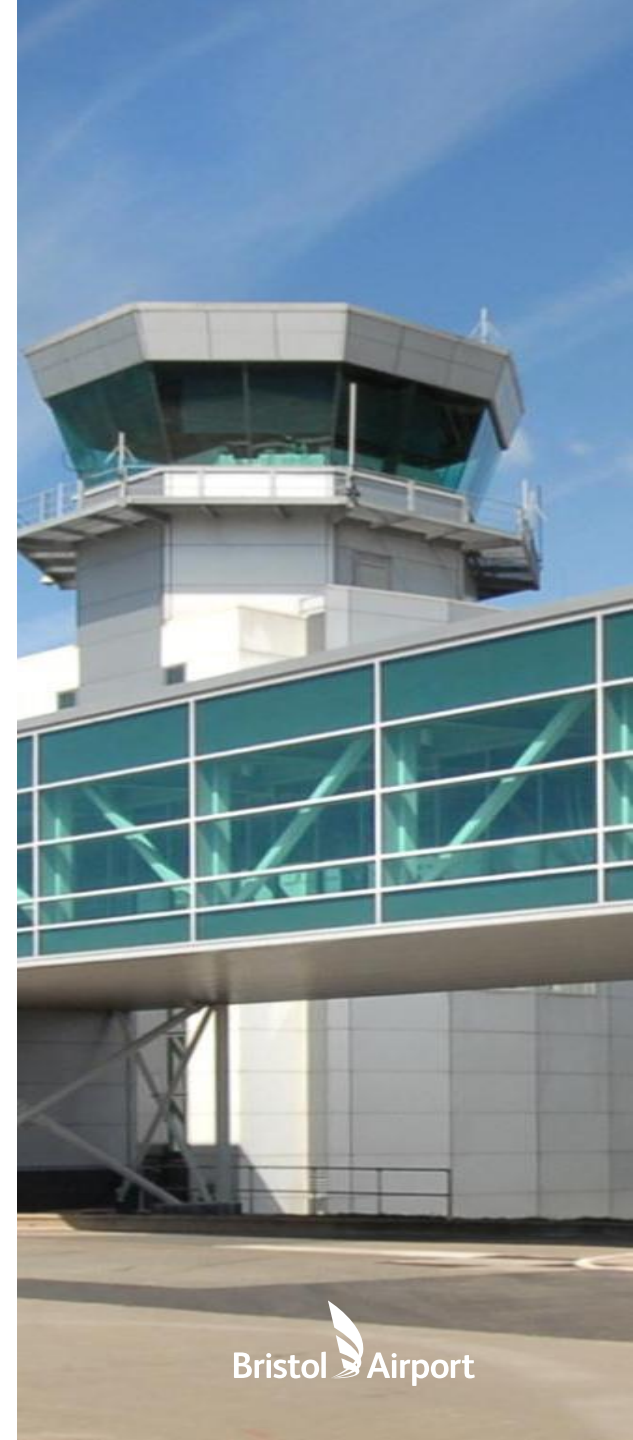
# CECA SW Conference 2022

## Bristol Airport Update

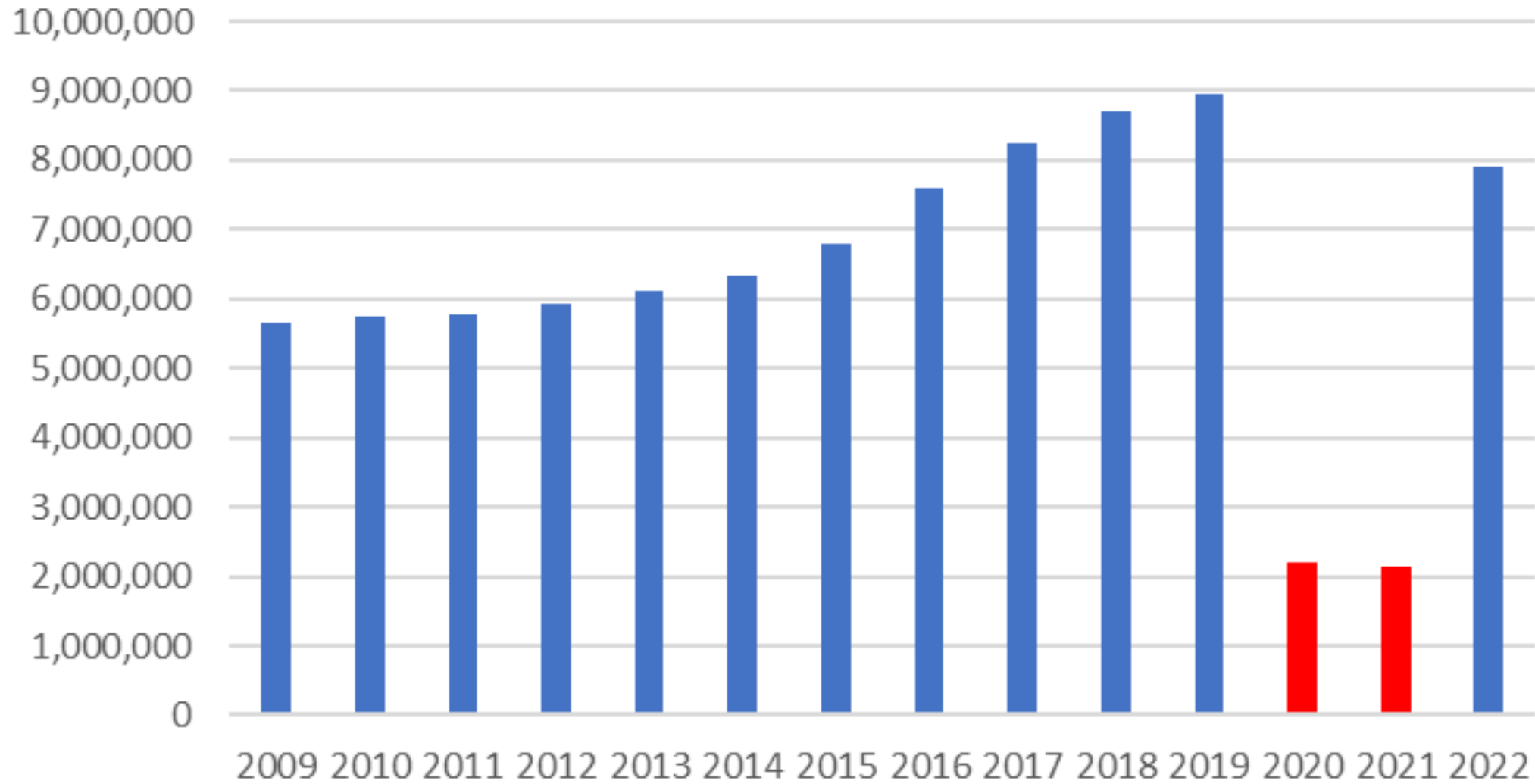
Sept 2022

# Bristol Airport overview

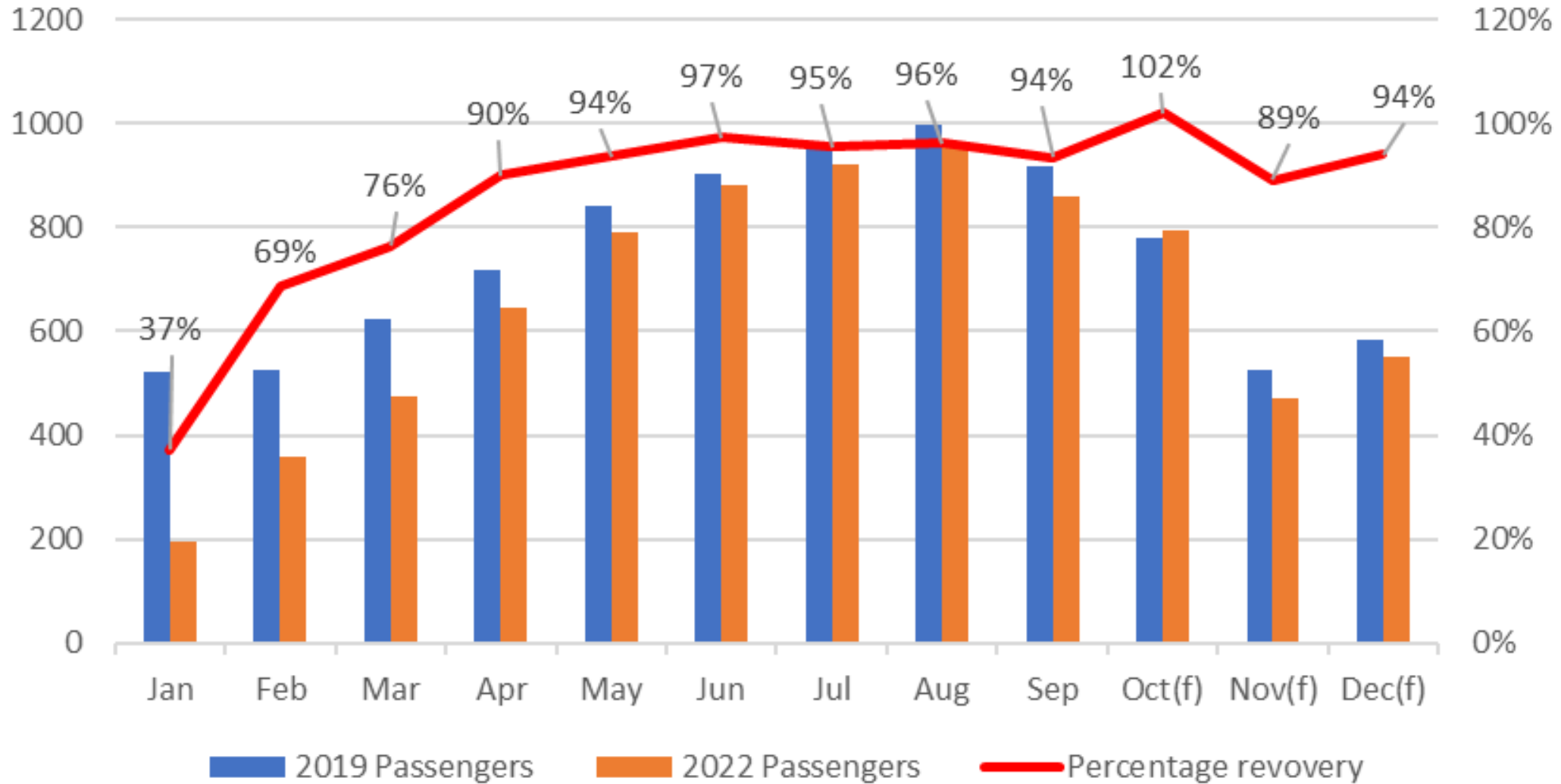
- 9<sup>th</sup> largest UK airport; 3<sup>rd</sup> largest regional airport in England
- The premier gateway airport for South West and South Wales
- Approaching 8m passengers per annum (mppa), 2m in 2000
- Fastest recovering large airport post covid (percentage)
- Catchment area of 7-8m, strong demographics
- Leading Low Cost, Charter and Full Service airlines
- Fly direct to over 116 destinations across 30 countries
- Vision to be a world-leading regional airport
- Significant growth opportunity through “Clawback of Leakage”
- Planning permission to grow to 12mppa in a sustainable manner (subject to Judicial Review)
- Significant investment pre-covid enabled growth in 2022
- Plans for significant investment 2023 onwards
- Major shareholder Ontario Teachers Pension Plan (assets \$227bn)



## Bristol Airport Passenger Numbers



## Passenger Recovery @ BRS



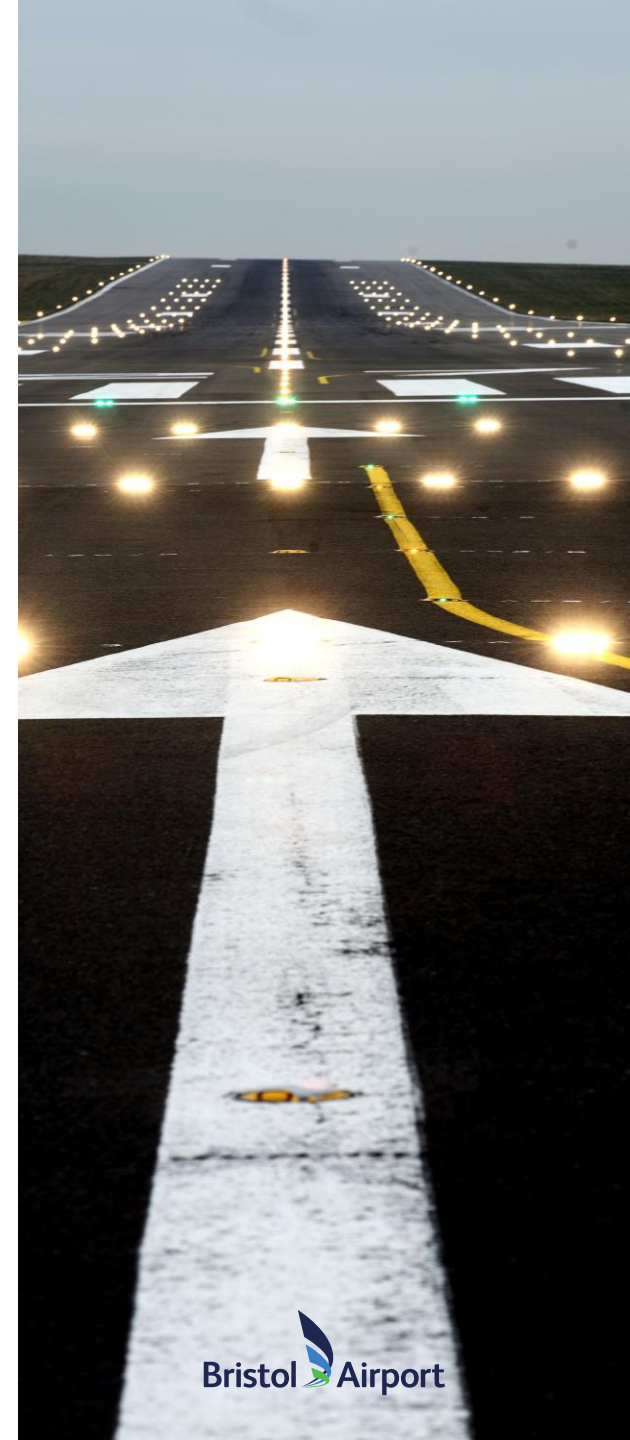
Poor Q1 – Loss of circa 500k passengers due to omicron variant otherwise likely 8.5mppa

# Future Passenger Growth

- 2023 will bring some huge challenges for all of us
  - Cost of living crisis inflationary pressure
  - Bank of England increasing interest rates
  - Value of sterling impact on travelers
  - Value of Sterling impact on airlines (fuel purchased in \$)

Despite this we anticipate further growth in 2023 to between 8 and 9mppa – More seats on sale today than 2019!

- Continued increase in market share of existing South West traffic through superior airline & destination network
- Pent up demand after covid - many still to travel overseas
- Strong demographic with a propensity to fly
- Reduction leakage from London Airports - 7m journeys by South West passengers from London Airports in 2019



**Our vision:**

**To be everyone's  
favourite airport,  
delivering a future  
we can all be proud  
of.....**



The challenge

DELIVERING A

**SUSTAINABLE  
AND GREENER**

**FUTURE**



# Ten years of transformation



## Passengers



2008: 6.3 million  
2018: 8.63 million

## Aircraft movements



2008: 76,517  
2018: 76,987

## Average load



2008: 105  
2018: 131

## Most popular route



2008: Dublin  
2018: Amsterdam

## Max recorded noise level



2008: 100.4 (LMAX)  
2018: 82.9 (LMAX)

## Public transport use



2008: 7.7%  
2018: 12.5%

## Bristol Flyer passengers



2008: 537,770  
2018: 836,688

## Waste recycled



2008: 21.3 %  
2018: 49.6%

## Waste to landfill



2008: 1,099.63 tonnes  
2018: 0.51 tonnes

## CO<sub>2</sub> per passenger



2008: 1.2 kg  
2018: 0.69 kg

## Jobs



2008: 3,125  
2018: 3,978

## Community funding



2008: £42,300  
2018: £171,000

But we now need to really up our game!





# Our journey so far



~~2025~~  
2021



# Our most amazing journey yet



Becoming the UK's first  
net zero airport by **2030**



This will have a huge impact on our infrastructure going forward!

# Surface access at major UK Airports (2018)

Airport	Passengers per annum (m)	Rail link / Tram	Motorway Connectivity / Proximity	Dual Carriageway (minimum)	Bus Connection	Public Transport use (%)
Heathrow	76	✓	✓	✓	✓	41%
Gatwick	43	✓	✓	✓	✓	41%
Manchester	26	✓	✓	✓	✓	16%
Stansted	24	✓	✓	✓	✓	50%
Edinburgh	12	✓	✓	✓	✓	30%
Luton	15	✓	✓	✓	✓	29%
Birmingham	12	✓	✓	✓	✓	23%
Glasgow	9	x	✓	✓	✓	14%
<b>Bristol</b>	9	x	x	x	✓	13%
Newcastle	5	✓	x	✓	✓	12%
East Midlands	5	x	✓	✓	✓	7%
Liverpool	5	x	x	x	✓	20%
London City	5	✓	x	✓	✓	46%

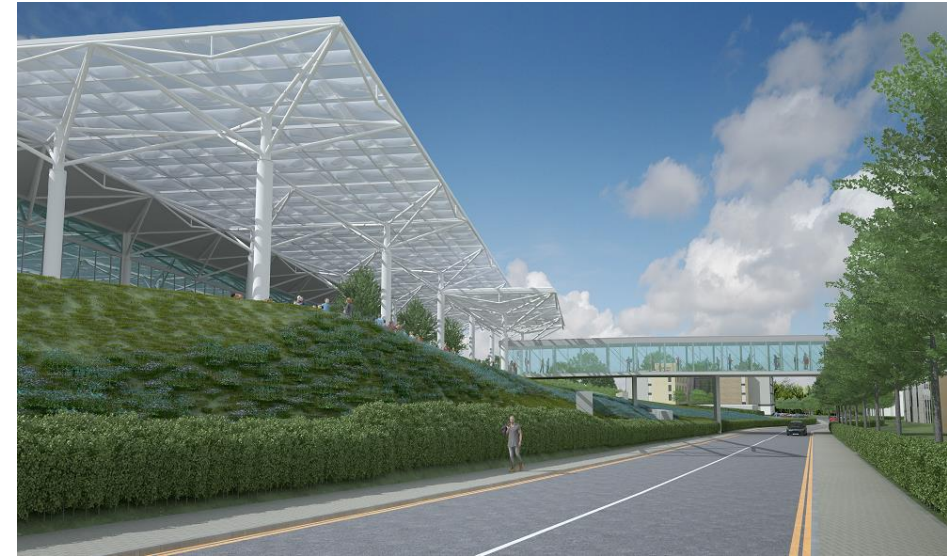


# Implementation of the 10 and 12mppa Planning Permissions



# Summary of the Planning Permissions

- Planning permission approved in February 2011 to develop and enhance facilities to handle 10 mppa with a further permission obtained early 2022 to take us to 12mppa
- Comprises 40 separate projects phased in line with demand including:
  - Terminal extensions, walkways/Piers
  - Aircraft stands, car parking capacity and ancillary functions
  - S106 roadworks to A38 to increase capacity (funded by BRS) managed by NSC
- Work commenced in November 2011 (10mppa approval), anticipated that 12mppa approval work will commence in late 2023 / Early 24





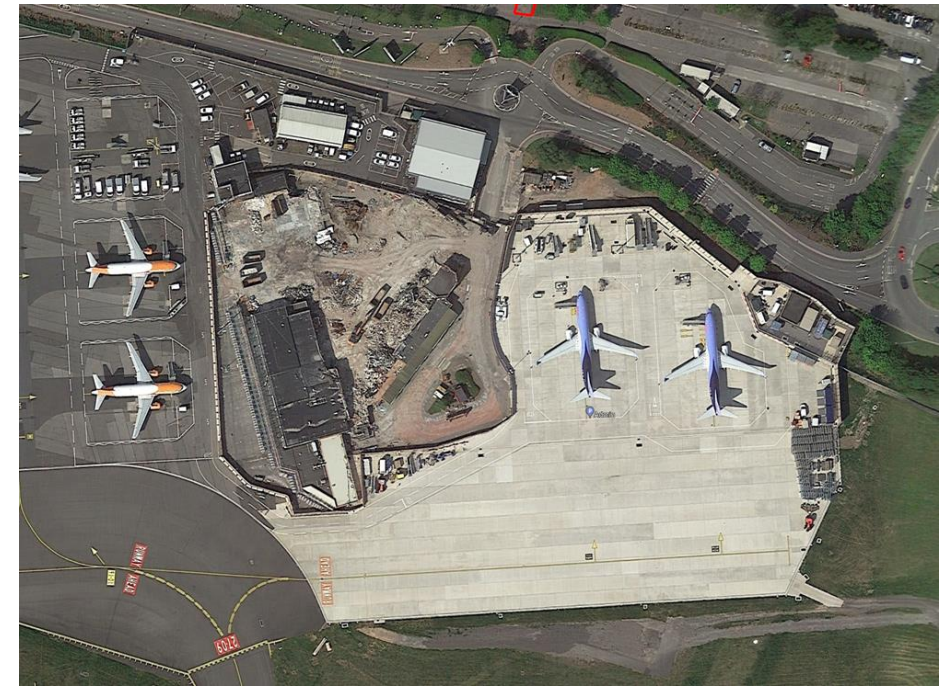


# Civil Projects in the Pipeline



# Airside Stand and equipment storage area

- Part of 10mppa approval
- Investment of £6m – approved by BRS board in September 22
- Located on the site of the Old Terminal Building
- Final development on east of site
- Enhanced operation airside and ability to control and sequence runway access
- Significant noise attenuation works and installation of fixed electrical ground power
- Appointing Ryebridge construction to construct
- Starting on site 17<sup>th</sup> October with planned completion in April 2023





## MSCP / PTI

- This project was first drawn in 2008!
- Almost 15 years later we are looking to make this reality
- Why is this project important to Bristol Airport
  - It will be our largest capital project EVER!
  - Key Contributor to local economy
  - It will be a transformational project for us and our local communities in so many ways!





## PTI / MSCP

- Gateway to the airport and the first / last impression for next 50 years
- Create a seamless customer journey
- Safety benefits – segregate vehicles and passengers and provide very few opportunities for conflict
- Bomb blast offset from terminal
- Future proof further developments e.g. forecourt
- Provide infrastructure to take us to 12mppa
- Once PTI / MSCP is completed upgrade remaining northside car parks (circa 2,500 spaces)
- Sustainability benefits



Currently working with Griffiths / Farrans as a CRH JV to design and cost scheme in a truly collaborative manner – with a view to appointment to construct in June 23

# Sustainability

- BRS are the leading force in UK aviation sustainability – pushing UK aviation into new thinking
- One of our biggest challenges is weaning people from the car to Public transport we have ambitions to increase our public transport %age significantly but need to put the horse before the cart – we must have a catalyst for change!
- We believe the right infrastructure will help enormously
- This project will deliver on key objectives
  - Creation of a world class PTI & promote sustainable options to protect the environment
  - Will carefully consider low carbon construction – What form this takes is being worked upon
  - Prevent contamination to our local environment by having first class parking facilities that public will want to use

















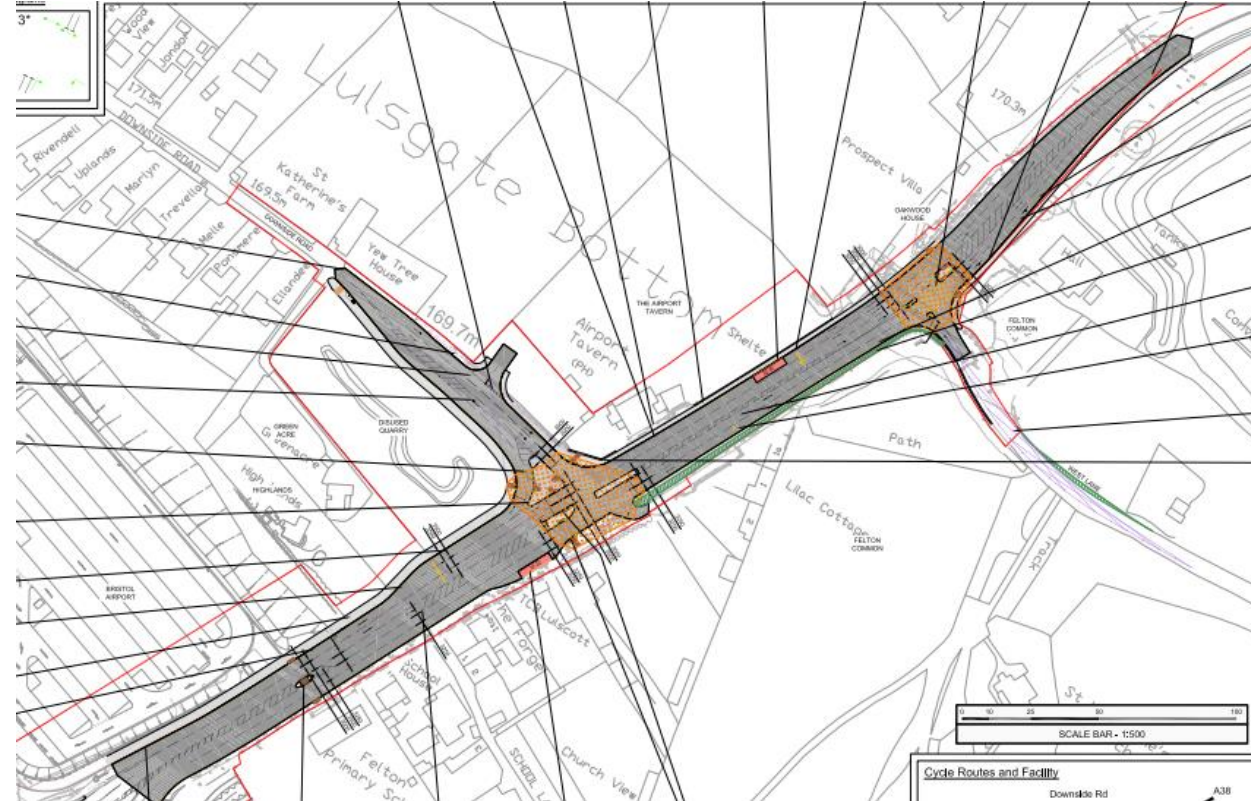






# A38 Widening Works

- S106 Contribution from BRS – NSC undertaking work
- Hopefully if MRN scheme is approved for funding will link to the wider scheme
- Important improvements and duelling of A38 to increase highway capacity and efficiency
- Anticipated Design will commence in next 12 months – construction timing TBA
- Cost to be agreed – circa £6-8m investment





## Cogloop Phase 2

- Part of 12mppa approval – subject to a monitor and manage requirement
- Timing of development to be agreed with NSC
- Provides 2700 additional block parking spaces – needed peak periods and summer in particular
- Circa 3 – 3.5m investment



# Sustainability Projects





## Investments in Sustainability led Projects

- Investing over £40m by 2030 on sustainability projects
- Investing heavily in zero carbon vehicles and charging
- Upgrading incoming HV power to the airport to enable aircraft ground power, vehicle charging and equipment charging on site
- Energy Saving high importance – 2022 v 2019 saved approx. 20%
- Working on ways to increase renewable energy and energy generation (minimum 25% on site renewables targeted)
- Working with airlines such as easyJet on ways to turn around aircraft using zero carbon
- Plan to install large HV charging hub on site in 2023 to enable fast and reliable charging for our customers
- Investigating use of hydrogen on site including construction activities
- Big challenge is decarbonisation of airline fleet from 2035 and scale of infrastructure needed



# In Conclusion

- Tough 2 years due to covid
- Fastest recovering major airport in UK
- Expect a tough year or 2 with issues in UK economy but we still expect to grow!
- We have planning to expand from current 8mppa to 12mppa (subject to JR)
- We have significant issues with surface access which we need to work around
- Looking to invest heavily in sustainability and sustainability led projects
- Investment in infrastructure starting again in October 2022
- Plan to build biggest project ever commencing in 2023 which will bring huge changes to the airport and provide a catalyst for increased public transport
- Want to reduce rogue parking sites that are painful for local residents
- We want to deliver our vision for the region



Thank You for Listening!



# Questions?

