



MAKING AIRPORT EXPANSION A REALITY





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MARC WOOLFSON

Founding Partner, WA

Aviation policy has become a key test of ambition for the UK Government's plans for infrastructure investment. Yet after years of debate and despite recent endorsements of expansion plans, the sector still faces uncertainty, inertia and rising international competition. While governments abroad are delivering rapid, large-scale expansions, the UK's approach has been fragmented, with stalled progress on key national projects and a growing disconnect between capacity and demand.

As demand for air travel grows and the economy looks for new sources of productivity, the UK must resolve how best to plan, approve and deliver airport capacity that meets long-term national needs, while balancing sustainability, public concerns over noise and disruption with the need to drive regional growth and match global competitiveness.

To discuss how your organisation can shape and advance the airport expansion debate, please contact **Marc Woolfson** at MarcWoolfson@wacomms.co.uk.

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WA'S NEW PUBLIC POLLING ON SUPPORT AND OPPOSITION TO AIRPORT EXPANSION

47%

OF THE PUBLIC
ARE FAVOURABLE
TOWARDS EXPANSION
OF THEIR CLOSEST
AIRPORT(S)



15%


SAY THEY DO NOT
FAVOUR EXPANSION

57%

OF REFORM UK VOTERS
ARE IN FAVOUR OF
EXPANSION – THE
HIGHEST PARTY
SUPPORT

51%

OF THOSE IN FAVOUR
OF AIRPORT EXPANSION
HIGHLIGHT JOB CREATION
AS THE REASON



54%

OF THOSE WHO LIVE WITHIN
10 MILES OF AN AIRPORT
ARE FAVOURABLE TOWARDS
EXPANSION – FURTHER
AWAY, ONLY 44% SAY
THEY ARE FAVOURABLE



50%

OF THOSE OPPOSING
AIRPORT EXPANSION
CITE THE ENVIRONMENTAL
IMPACT, NATIONALLY
AND LOCALLY

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Our exclusive new public polling shows considerable support for airport expansion – overall, 47% of the public are in favour of expansion, and just 15% oppose it.

Although a significant 30% of respondents had neither a favourable or unfavourable view on expansion.

Labour, Conservative and especially Reform UK voters were generally supportive of airport expansion, with 53% of those who voted Labour and Conservative at the last general election, and 57% of those who voted Reform, in favour. Liberal Democrat voters were less likely to support expansion (41% were in favour). Perhaps surprisingly, 30% of Green voters expressed a favourable view on expansion.

SUPPORT

Those within 10 miles of a major airport are notably more favourable to expansion: 54% of those living nearby support expansion, versus 44% of those nearby who are not in favour.

Of those who are favourable to expansion, job creation (51% of respondents), the time or cost savings of being able to travel from an expanded airport that is nearer (42%), and increasing the number of international destinations the nearby airport serves (40%) were highlighted as the main reasons for supporting expansion.

OPPOSITION

Those who oppose expansion focus on the national implications – in particular highlighting the environmental impact, the most important factor for those who oppose expansion, with almost 50% of those who are not in favour of expansion citing either local or national environmental issues (those who live within 10 miles of an airport are naturally more concerned about the local environmental impact).

Increased road or transport congestion is a concern to all those who oppose expansion, regardless of whether they live near to an airport – with 33% of those who are not in favour of expansion citing this as a concern.

The cost to the government, taxpayer, or those flying – for example through direct government spending or higher airport passenger fees – was a notable reason for opposing expansion for those who are not near a major airport: 34% of those who oppose and are not near to an airport cited this as a reason, whereas for those living nearer only 23% were minded to oppose due to the cost implication.

ADVANCING EXPANSION PLANS

It's seven years since the Airports National Policy Statement (NPS) was approved by Parliament, yet Heathrow's third runway remains undelivered.

Individually, the criteria for assessing airport expansion plans are regularly the subject of government or parliamentary enquiries, consultations, targets, or assessments by the relevant regulator – providing the opportunity to demonstrate progress against these requirements. Some upcoming examples around noise, planning, airspace design, and environmental impact are shown below.

- **June 2018** – Airports National Policy Statement (NPS) formally adopted by Government, enabling Heathrow expansion.
- **December 2020** – Supreme Court upholds the NPS following legal challenges over climate impacts.
- **2023–24** – Expansion proposals advance for Luton, Stansted, Gatwick, London City, and Southend.
- **January 2025** – UK Government announces update to the Airports NPS and renews backing for Heathrow expansion.
- **October 2025** – Deadline for a final decision on Gatwick's northern runway project.
- **October 2025** – The current noise-designated airports (Heathrow, Gatwick and Stansted) regime ends. The next night flight regime will run for 3 years, to October 2028. The CAA's Aviation Noise Attitudes Survey will produce the first phase of findings in late 2025 or early 2026.
- **Late 2025** – The Airports National Policy Statement (NPS) is due to be amended, including public consultation and select committee scrutiny.
- **End of 2025** – The new UK Airspace Design Service begins operation, tasked with reshaping the airspace around the UK, beginning with London, including changes required for a third runway at Heathrow.
- **2026** – The Planning and Infrastructure Bill is expected to become law, reforming the Nationally Significant Infrastructure Project planning process in England, including changes to the consultation requirements for projects and reducing the number of opportunities for legal challenges to (at most) two.
- **2030** – The target for use of Sustainable Aviation Fuel rises to 10% of all jet fuel; rising to 22% in 2040. The Jet Zero strategy targets 'net zero aviation' by 2050.

AIRPORT CAPACITY: THE UK IS FALLING BEHIND – NATIONALLY AND INTERNATIONALLY

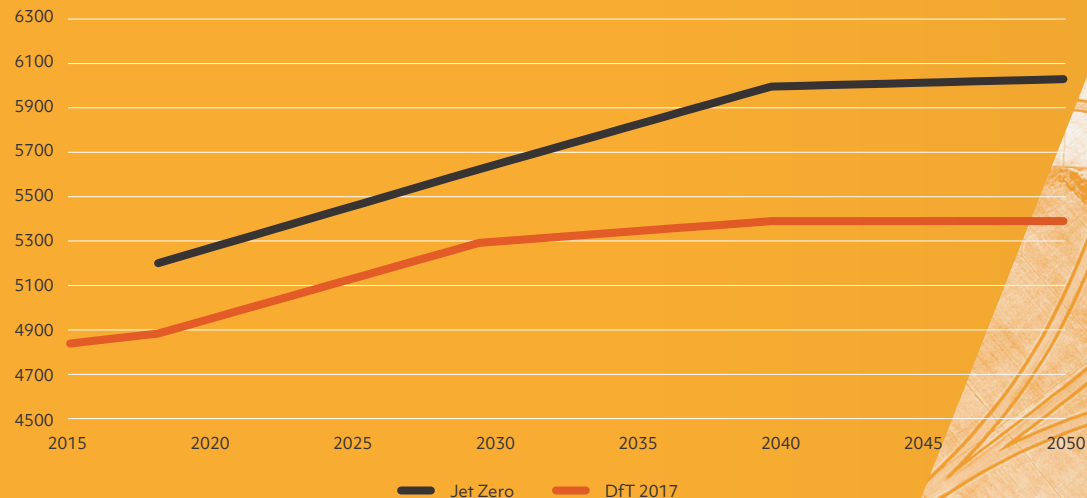
UK AVIATION CAPACITY

The UK continues to be a major global aviation player, moving nearly 300 million passengers and around 3 million tonnes of cargo each year.

Gatwick, Stansted, Luton, Southend and London City all have published or approved expansion plans, though most remain in early stages or await final decisions.

Heathrow's plan is expected to be submitted imminently. While significant capacity is planned on paper, progress on the ground has been limited. Each successive forecast raises expectations further, but without the infrastructure to support it, the gap between ambition and reality continues to widen.

COMPARISON BETWEEN JET ZERO FORECASTS (MARCH 2022) AND DFT AVIATION FORECASTS (OCTOBER 2017): AIRPORT CAPACITY FORECASTS



Published expansion plans just across the South East of England (at Heathrow, Gatwick, London City, Luton and Stansted Airports), combined would add significant capacity and economic impact.

However, rapid expansion across the world sets a pace the UK must now match to remain competitive.

123.4M
PASSENGER CAPACITY
INCREASE

29,700
JOBS CREATED

£3.6BN
ECONOMIC ACTIVITY
CREATED

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Gate
Gates **A26-A27** →

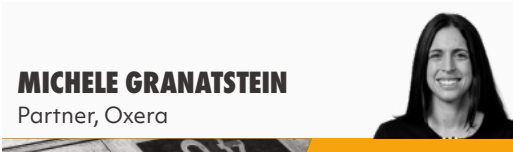
GLOBAL AVIATION CAPACITY

While growth in the UK has been steady, other regions are accelerating.

	China	Saudi Arabia and the UAE	Turkey
	The expansion of just Beijing Daxing, Guangzhou Baiyun and Zhengzhou airports will add:	The expansion of Dubai International Airport and Riyadh's King Abdulaziz International Airport, and the development of Al Maktoum International Airport in Dubai and King Salman International Airport in Riyadh will add:	The Istanbul New Airport dramatically increases capacity in the city:
Passenger capacity	+190m Increase capacity from 130 million to 320m passengers, in the next decade.	+352m Increase capacity from 118m passengers to 470m passengers, in the next decade.	+130m Capacity of 70 million passengers at the previous Atatürk International Airport in 2019 jumps to 80m at today's IST, with the ability to accommodate 200 million passengers a year when fully completed in 2028.
Cargo capacity	+9.1m These airports will be able to handle 12.8m metric tonnes of cargo, up from 3.7m today.	+15.5m The new Al Maktoum and King Salman airports will add 15.5m tonnes of new cargo capacity in the region.	+2.5m The new airport has a cargo capacity of 4m tonnes, rising to 5.5 million tonnes upon completion of all phases – up from 1.5m tonnes at Atatürk International.

HOW AVIATION EXPANSION CAN DELIVER ON GROWTH, DRIVE PRODUCTIVITY AND BOOST UK CONNECTIVITY

Expansion is not just about runways, it's about unlocking long-term national and regional economic potential, across a number of aspects – from greater connectivity and more trade and tourism, to jobs and productivity.



MICHELE GRANATSTEIN
Partner, Oxera

Airport expansion can generate significant economic benefits at the local and national levels.

At a local level, additional traffic at an airport creates employment on-site (direct impacts) and in the airport's supply chain (indirect impacts). These additional employees spend their salaries on local businesses (induced impacts), and the additional traffic generates inbound tourism and attracts activity from businesses that want to locate nearby (catalytic impacts).

In addition to these local impacts, capacity expansion creates national impacts. Increased traffic provides additional connectivity for the UK and, as a by-product, additional trade.

The UK Government also benefits through higher tax collections on tickets, and on all incremental spending in the UK and increased trade. There are also welfare benefits for those that already planned to travel (through lower fares due to less congestion) and for those who decide to travel as a result (as otherwise they wouldn't travel).

As well as the benefits of airport expansion, it is important that any assessment takes account of the costs – including emissions, local air pollution and noise.

Any analysis of an airport expansion scheme must therefore cover a wide range of areas. Looking forward, a key challenge is for these analyses to balance impacts across different assessment areas (e.g. socioeconomic and environmental impacts) and to harmonise approaches across schemes (e.g. in traffic forecasts, or in reporting of environmental/ socioeconomic impacts).

SIR PHILIP RUTNAM

Chair, WA Advisory Board –
and former Permanent Secretary,
Department for Transport



Airport expansion now has strong political backing under this Government, but what are some lessons about turning it from an announcement into a reality?

The first is to recognise what an enormous undertaking expansion at a big airport is, and how - particularly for the biggest - government and politics are implicated at every level. And government involvement is complicated because of its multiple roles: it's aviation regulator, environmental decision-maker, public transport planner and funder, and growth cheerleader, all at the same time. A good sign that airport expansion is making real progress comes when government recognises these different responsibilities, and steps up its own human and financial resources to address them - a tough ask when public spending is under tight pressure, and a tricky one when there's lots of legal risk too.

A second point is political. We all know the on/off history of commitments, and the actual record: there have been some great new terminals, and a new runway in Manchester, but no full-length runway in the south-east since 1945. One lesson from the last ten years is that no amount of hard work can deal with all political risk (aka Boris Johnson). But the hard work does pay off: political risk can be reduced, and the centre of gravity in the debate can be shifted, but only by really investing in multiple audiences, mitigating concerns where possible, explaining the real issues clearly, and listening carefully.

Finally, expect the unexpected. Even with the changes in planning law, these projects take so long that the external environment is bound to change in unexpected ways. So a final lesson is about the importance of strong leadership and succession planning, in government just as much as its airport partners.

At WA, we understand the policy, regulatory and political dynamics shaping the UK's infrastructure decisions. We help clients navigate these challenges and craft strategic communications that can support constructive engagement with decision-makers, stakeholders and the public.

To discuss how your organisation can shape and advance the airport expansion debate, please contact **Marc Woolfson** at MarcWoolfson@wacomms.co.uk.

POLLING

Our public polling was conducted by **Survation**.

Method: Online panel

Population: UK Adults aged 18+

Fieldwork: 14th - 16th July 2025

Sample size: 2,131

ABOUT WA

WA is a strategic communications consultancy helping organisations achieve policy and reputational outcomes.

We're integrated in approach, bringing together public affairs, corporate communications, digital, research and creative services.

We're specialists in sectors where government action, media interest and public impact are often interlinked, including energy, education, financial services, healthcare and transport.

Our clients, whether global giants, leading charities or blue-chip brands, come to us for help navigating the complex communications challenges of these multi-stakeholder environments.

We bring about change for clients and communicate their impact in society – from strengthening involvement of patients in their treatment, to helping to secure free school meals funding, to promoting net-zero public transport.

Our success is underpinned by our independence and partnership model – giving us the flexibility to advise, invest and innovate around what clients need.



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