London
BAA Gatwick

Gatwick Airport Surface Access Strategy 2007

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Gatwick Airport Surface Access:
"A strategy focused on building for the future – engaging with our business partners and stakeholders to ensure that our passengers and employees have access to a range of travel options that meet their particular needs."

Welcome note

Running Gatwick, the UK's second busiest airport, brings with it many challenges, not least ensuring that our passengers and employees are able to travel to and from the airport safely and swiftly with a choice of transport options.

The good news is that the proportion of Gatwick's air passengers and employees using public transport continues to increase and the air passenger share now stands at over 35%. This figure is higher than at any time in the last ten years. Our goal of achieving 40% comes closer, with the exciting prospect of a new rail station and combined transport interchange for the airport, the welcome news of the retention of Gatwick Express, and the go-ahead for the much awaited Thameslink project. These are important steps which form part of our strategy to reinforce Gatwick as an obvious gateway into London – in time for the Olympics in 2012.

We recognise that the volume of trips generated by an airport the size of Gatwick requires a set of measures to mitigate the environmental impacts of airport-related road trips. This strategy lays out the framework for such measures and highlights the importance of working in partnership with others to reduce car dependency. At the same time, it is vital that the local and strategic road network is able to cope with the demands of the airport, local businesses and residents, many of whom work in airport-related jobs. Therefore, a key part of our strategy focuses on working with the highway authorities to keep the traffic moving and minimise congestion.

We also need to provide sufficient on-airport parking to meet future growth and avoid a proliferation of unauthorised off-airport sites, and the local authorities work hard to address this. Our strategy sets out realistic forecasts of the scale of supply that we think is necessary, taking into account the higher use of public transport. We are also putting renewed efforts into the management of the terminal forecourts to improve safety, security and customer service and reduce the risk of congestion.

This document supports the future growth strategy outlined in our Interim Master Plan published in 2006. In this context, we are reviewing our commitments made with the local authorities in 2000 relating to the sustainable development of the airport. We continue to report on progress against these commitments and our surface access targets through the Annual Monitoring Report which is available to view on our website www.gatwickairport.com.

Andy Flower
Gatwick Airport Managing Director
October 2007

Setting the scene

Nearly 100 airlines fly from Gatwick to over 200 destinations across the globe. The growth of short breaks, changing holiday patterns and internet bookings are all having their impact on the way in which the airport continues to grow. Gatwick is unique amongst the London airports in having a significant presence of airlines operating within each of the three main sectors – full fare scheduled, charter and low cost – with the latter assuming an ever more influential role. By 2015 we are predicting that we will be handling close to 40 million passengers a year compared to the current figure of 35 million. Moreover, Gatwick is a key economic driver for the region, supporting almost 40,000 jobs in the regional economy, of which 25,000 are within the airport itself.

An effective surface access strategy is central to the delivery of Gatwick's responsible growth agenda. The management of road traffic at the airport will contribute to air quality management, reduce congestion and provide a better environment for our customers. Gatwick's scale of aviation activity has a direct bearing on the demand for road and rail travel to and from the airport, and the 2012 London Olympics promises to put even greater pressure on the transport network.

At the heart of the strategy lies an overriding target of 40% of passengers travelling to and from the airport by public transport by the time we are handling 40 million passengers. With a firm commitment from our business partners and stakeholders, we believe that goal is achievable and we are already making progress in achieving it.

Gatwick Airport Interim Master Plan

All major UK airports are required to prepare a surface access strategy that sets out how they propose to handle the demand for travel to and from the airport. This latest Gatwick edition, which replaces the version published in 2000 and covers the period up to 2015, supports our Interim Master Plan. The strategy is guided by a series of commitments that we have entered into with local authorities, as part of our licence to grow the airport within the boundaries defined by the Interim Master Plan. We have recently reviewed these commitments in conjunction with the local authorities, and expect to conclude an updated schedule in the very near future. There is however broad agreement on the issues to be addressed, and these are reflected in the strategy.

The strategy does not stand alone, and is integral to:

- BAA's Corporate Responsibility and airport sustainable development agendas
- Gatwick Airport Interim Master Plan
- Gatwick's commitments and legal obligations
- Local air quality action plan
- Local and regional transport strategies.

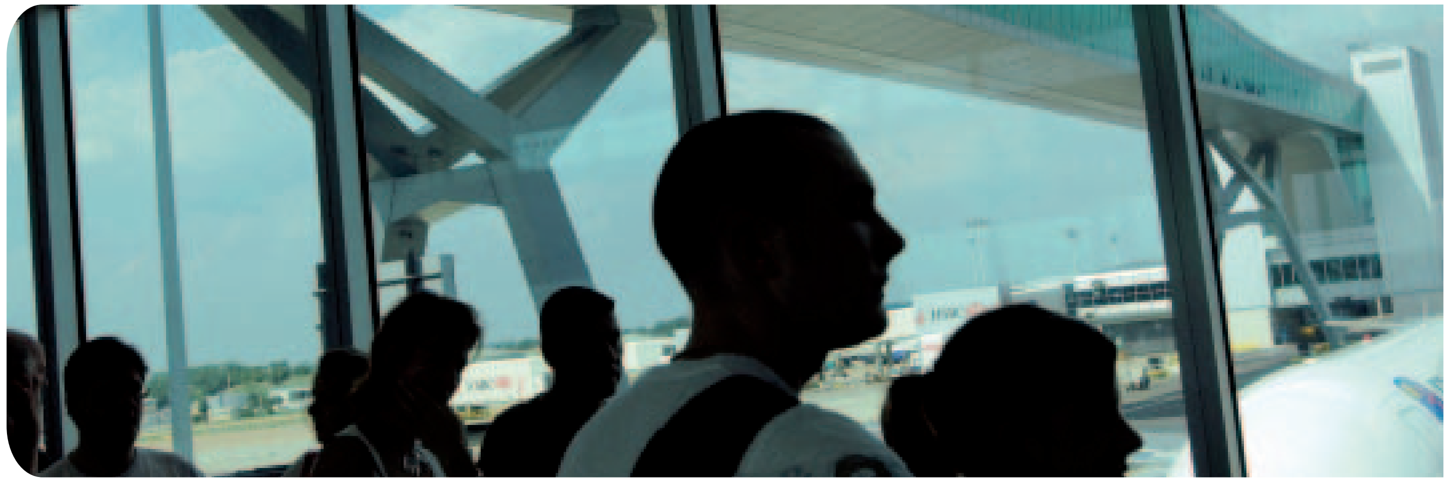
Customer focus

The focus of the strategy is on the customer – primarily our passengers and airport employees but also other airport visitors. Key components of the strategy are a choice of affordable and reliable public transport options for passengers and staff, maintaining good road and rail links and developing Gatwick as a major transport interchange.

Successful delivery of the strategy requires partnership, commitment and investment. Effective engagement with our partners is critical – BAA Gatwick's area of direct responsibility in relation to surface access covers the provision and maintenance of the airport's external infrastructure within the airport boundary (roads, forecourts, and car parks) but not the strategic road links to the airport, the rail lines and rail station. All public transport services are provided by external operators. That is not to say that BAA cannot influence the wider surface access picture and much of the strategy focuses on how we work with others to achieve our common objectives and an integrated transport strategy.

Gatwick's Surface Access Strategy has three main objectives, working with our stakeholders and business partners to:

- Reduce the rate of growth of trips by private car and taxi to and from the airport by encouraging greater use of public transport
- Ease congestion by better traffic management and implementing strategic road improvements
- Manage on-site traffic emissions



Transport Forum

Our role is to work with a wide range of stakeholders and business partners in order to achieve a co-ordinated approach and common agenda. The main consultative group is the Gatwick Area Transport Forum, set up in 1998 and made up of around 60 representatives from BAA, local authorities, transport providers, airlines, car park operators and other interested parties.

The Forum's remit is to co-ordinate and integrate transport solutions across the Gatwick area and the wider South East region. In so doing, it supports the local authority Local Transport Plan programmes and the objectives of the Regional Transport Strategy for the South East. The Forum normally meets annually and has three main objectives:

- To draw up and agree challenging short- and long-term targets to increase the percentage of airport passengers using public transport
- To devise strategies to achieve these targets
- To oversee the implementation.

A smaller steering group meets every quarter to progress topical issues and emerging policy. Members of the steering group are drawn from the following organisations:

- West Sussex County Council
- Surrey County Council
- Crawley Borough Council
- Tandridge District Council
- Government Office for the South East
- South East England Regional Assembly
- Network Rail
- Gatwick Diamond (local business development association).

In addition, from time to time the steering group appoints task groups, to look at specific issues. Recent examples include looking at the viability of potential new bus routes to improve public transport accessibility, the development of the local cycling and pedestrian network and a review of the airport car parking strategy.

The way forward

Much has happened since our original strategy was launched in 2000. Passenger growth suffered a downturn due to the events of 9/11, coupled with BA's strategic downsizing of its long-haul operations at Gatwick. The passenger mix has changed in the intervening period, with low-cost carriers, for example easyJet, making significant inroads into the market. The real costs of motoring continue to fall whilst that of public transport has generally increased. The much awaited Thameslink rail project has now been given the go-ahead but is still several years away from completion. Perhaps most significantly, the Gatwick Express has been under scrutiny during the prolonged consultation on the future of the Brighton Main Line. Its future now seems secure following the Government's announcement, although some aspects of the current operation will change.

In addition, awareness of climate change has risen on the political and social agenda, with surface access and energy consumption very much to the fore. Against this background, we have set out our strategy to 2015 which provides a framework for initiatives and action plans that we intend to progress with our partners and stakeholders during this period.

This document includes:

- Progress since the first Surface Access Strategy was released in 2000
- A picture of where we are today
- Our targets
- Our strategy and work programme
- The monitoring and review process.

Figure 1 Public Transport usage

	Passengers using public transport %	Passenger numbers m	Non-transfer passengers m
2000	31.5%	31.9	24.6
2001	30.3%	31.1	25.0
2002	30.2%	29.5	23.8
2003	32.2%	29.9	24.6
2004	31.3%	31.4	26.5
2005	31.9%	32.7	26.6
2006	35.3%	34.1	28.2

Source: Civil Aviation Authority (CAA) Airport Survey

Where we have come from

Gatwick's Surface Access Strategy – progress since 2000

Gatwick's first Surface Access Strategy, published in 2000, focused on the same essential premise that defines all our work in the field of surface transport – namely, influencing the way passengers and employees travel to and from the airport in order to reduce the growth of road trips. When we published the strategy it was predicted that passenger numbers would reach 40 million by 2008 and one of our key targets was to increase the percentage of passengers using public transport from 31% in 2000 to 40% by 2008.

The impact of the 9/11 terrorist attacks in 2001, coupled with the scaling back of British Airways' long-haul operations at Gatwick, resulted in a significant downturn in passenger numbers in the years that followed. Passenger numbers returned to pre 9/11 levels in 2005. Gatwick now expects to reach the 40 million passenger milestone in 2015 or shortly after.

The strategy was updated in 2004, looking forward to 2012 with revised passenger forecasts. It continued the theme of promoting alternative means of travel, and introduced targets for specific travel corridors to support the overall 40% public transport target.

Since 2000, Gatwick has invested £7 million in a range of schemes and initiatives, both large and small, to support our surface access commitments. We regularly produce marketing and publicity material to promote public transport alternatives for passengers and staff. The primary source of funds for our public transport and staff travel initiatives is a Transport Levy which is imposed on all public and staff car parking. The revenue is ring-fenced for projects that support our surface access objectives.

There has been significant progress in three key areas:

- Use of public transport by air passengers increased to 35.3% in 2006 compared to 31.5% in 2000, which means that an additional two million journeys were made on rail, bus and coach services compared to 2000.
- Over the last ten years, the proportion of airport employees driving to work from the Crawley/Horley area has dropped from 71% to 63%*, the equivalent of around a quarter of a million fewer road trips per annum on the local roads.
- Peak hour road trips to and from the airport are on average fewer than in 1998 despite a 25% increase in the number of non-transfer passengers. In the same period the volume of traffic using Britain's roads has risen by almost 9%**.

** Source: BAA Staff Travel Survey 2007*

***Source: Transport Statistics for Great Britain 2006, DfT*

Schemes and initiatives introduced since 2000

2000
- > Gatwick published its first Surface Access Strategy
- > Gatwick signed unique legal agreement with West Sussex and Crawley councils to protect local communities from the impacts of future airport growth
- > Gatwick Direct bus service introduced (forerunner to Fastway service)
- > Completion of Cycle Route 21 between Horley and Crawley via the airport
- > Discounted bus and rail travel fares introduced for airport employees

2001
- > Airport Car Share scheme launched to encourage greater employee car sharing
- > Secure cycle storage pods installed at North and South Terminals

2002
- > Development of traffic model for Gatwick and its approach roads
- > Automatic traffic count loops installed on landside roads to enable the airport to monitor traffic levels 24 hours a day.
- > Travel survey of all airport employees
- > Consultation paper on coach station strategy

2003
- > BAA invested in Fastway quality bus scheme to improve public transport options for airport employees who live in Crawley and Horley. Phase 1 services launched in September.
- > Launch of Oxford Airline express coach service to Gatwick
- > Gatwick Traincard relaunched to give wider range of benefits to airport employees – 34% off most train fares

2004
- > BAA Gatwick led high-profile campaign to retain the Gatwick Express
- > New, air-conditioned trains on Southern Train services replaced old slam-door stock
- > 24-hour operation introduced on Fastway
- > d2d – a 'demand-responsive service' bus service for airport staff living in East Grinstead – was trialled
- > Interim update of 2000 Surface Access Strategy

2005
- > Outline Master Plan consultation document launched
- > Launch of Fastway phase 2 services to Horley
- > Introduction of early morning airport bus service from East Grinstead
- > Completion of refurbishment of multi-storey car park 2
- > Discussions reopened with Highways Agency and West Sussex County Council on highway access improvements

2006
- > Department for Transport (DfT) launched second round of consultation on Brighton Main Line train services
- > Launch of Gatwick Commuter – a travel plan for the entire airport community
- > Fastway service grew to 6,000 passengers a day
- > First Capital Connect took over the former Thameslink franchise
- > Express coaches moved to upper forecourt level at South Terminal
- > Gatwick published Interim Master Plan outlining potential future development
- > Completion of refurbishment of multi-storey car park 3
- > Consultation began on revised Surface Access Strategy

2007
- > Network Rail started a major study into the redevelopment of Gatwick rail station
- > New Airport Car Share Scheme introduced
- > Fastway service used by over 9,000 passengers a day
- > Updated airport-wide staff travel survey
- > Implementation of forecourt access traffic management plan
- > Completion of refurbishment of multi-storey car park 1 and 5
- > Government decision on Brighton Main Line and Gatwick Express

Where we are today

Air passengers

Passengers

Airports have seen tremendous changes since Gatwick launched its Surface Access Strategy in 2000. Booking flights over the internet was in its infancy and low-cost airlines were still testing the water in terms of routes and aircraft numbers. Since then, the growth in short breaks, allied with newer airlines challenging the power base of the traditional airlines, have changed the landscape of Europe's airline industry. The terrorist attacks of 2001 also had significant impacts on airlines, air passengers and airport operators.

Passengers have become increasingly astute in shopping around on the internet for good flight deals and have also broadened their horizons to travel to destinations further afield. These changes have had a knock-on effect on the way people choose to travel to and from the airport, none more so than at Gatwick where we have a mix of full cost scheduled, charter and low-cost passengers, all with their own preferences and needs. In this section we explore the surface transport trends and the factors that influence people's surface travel decisions.

Looking forward

Passenger growth will have significant implications on the overall demand for road and rail journeys in Gatwick's vicinity and further afield.

Figure 2 shows the annual passenger numbers at Gatwick since 1996, with figures for non-transfer passengers (passengers who start or finish their journey at Gatwick). The proportion of transfer passengers has declined rather than rising as we predicted in 2000, largely due to the after-effects of 9/11 and British Airways switching long-haul services from Gatwick to Heathrow. The net result of this is that we are expecting more surface journey trips than previously predicted for 2008, which makes it all the more pertinent to have a surface access strategy to complement our responsible growth agenda.

Passenger mix and mode choice

There are four distinct areas in the passenger mix – UK leisure; UK business; foreign leisure and foreign business. UK leisure accounts for more than 70% of our passengers, with foreign business and leisure traffic making up 20% and UK business 10%. Those ratios are expected to continue much the same to 2015, but with further growth in the low-cost market and a dimunition of the traditional charter carriers.

Recent trends include:

- Since 2001 there has been a steady growth in the proportion of UK business passengers that use public transport – currently almost 40%, with a corresponding reduction in the percentage using private car and taxi
- There are signs of more UK leisure passengers using public transport following a decline at the end of the 1990s; just over a quarter of UK leisure passengers used public transport in 2006, compared to 20% a few years ago
- Not surprisingly, foreign visitors have a much greater propensity to use public transport, since 60% do not have ready access to a private car, and many are travelling to/from London for the initial/last leg of their UK trip
- Growth of low-cost airlines, whose passengers are more inclined to use public transport.

The majority of Gatwick passengers are travelling to and from locations in Greater London and the South East (accounting for 84% in 2006), with a further 10% coming from East Anglia, South Wales and the West Country. The dominance of passengers from the South East outside central London – 60% – is a major factor in the modest growth in overall public transport mode share to date.

Where people are travelling from, and their ease of access to public transport, are crucial factors in their choice of travel. For example, the majority of passengers travelling from central London take the train because of the ease, quick journey times and frequency of services on offer. Similarly, the excellent coach links along the M4 and M40 corridors have proved very popular with air passengers (see Figure 3). On the other hand, poor public transport options from Kent and good motorway links make driving to the airport an attractive option from this part of the South East.

The time factor

The time of people's flights is a significant factor in making their travel plans. There's been a shift towards early morning departures as low-cost and charter airlines have taken over previous long-haul in-bound slots. This has led to more passengers arriving early in the morning for check-in, especially with the introduction of increased security regulations. At those hours there aren't many public transport options, meaning driving or getting a taxi are the only practical ways to get to the airport. Late evening flight arrivals incur the same problem, as does the reduced availability of many public transport services on Sundays.

The challenge

The reality is that, for many, the car will remain the preferred choice of travel to the airport – based on a variety of factors that can include built-in prejudice against public transport, the size of the group travelling, the amount of luggage they are carrying, what time they are travelling and how easy it is to get to the airport by public transport. This is particularly the case at Gatwick given the dominance of UK leisure traffic, often away from the main rail corridors. The challenge for us and our partners is to find a way of breaking down these real and perceived barriers, and in particular to identify those market sectors where there is the greatest potential to influence change.

Strategy – see page 16 for more details

Figure 2 **Passenger numbers**

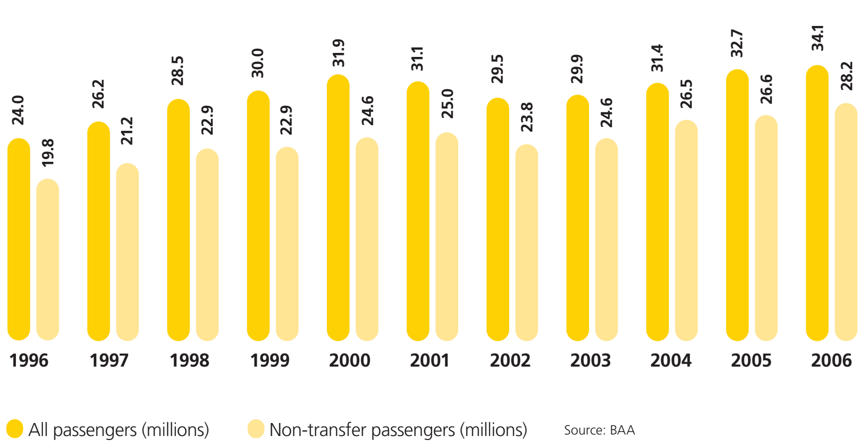
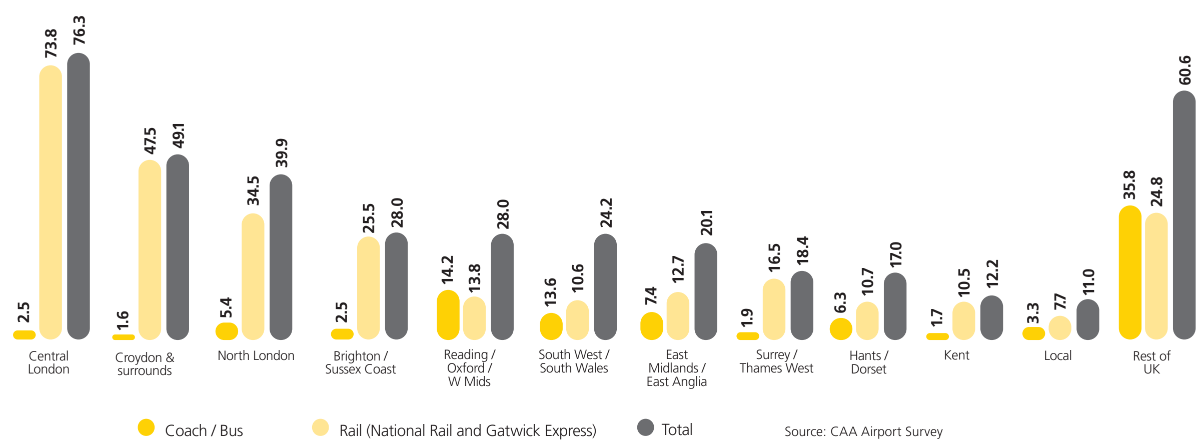


Figure 3 **Public Transport Share by corridor 2006**



Where we are today

Employees

Workforce

Keeping a major international airport like Gatwick running 24 hours a day clearly requires a large and multi-skilled workforce. More than 25,000 people work at the airport, with up to 18,000 reporting for work on any one day, and with different shift patterns.

Most staff are based in the North and South Terminals or in one of the airport's nearby office blocks. The other significant workplace areas are the cargo area and the aircraft maintenance area. There are an additional 4,000 directly airport-related jobs, many of which are based on the Manor Royal industrial park to the south of the airport.

Where people live

The largest group of airport employees – about one third – lives in nearby Crawley and Horley. Brighton, Horsham and Croydon are also home to significant numbers of employees.

How they travel to work

For employees, as for passengers, home location plays an important role in their travel decisions. Gatwick has carried out periodic airport-wide employee surveys in 1997, 2002 and 2007. The results for the most recent survey revealed the following:

Figure 4 Airport-wide employee travel surveys

	All airport employees	Crawley/Horley only
Car driver	70% (78%)	63% (71%)
Car passenger	5% (5%)	5% (7%)
Train	11% (8%)	5% (6%)
Bus and coach	9% (3%)	18% (5%)
Cycle and walk	1% (1%)	3% (4%)

Source: BAA Gatwick Staff Travel Survey 2007 (1997)

The strong growth in bus usage since 1997 reflects the major investment made by BAA Gatwick and its partners in services like Fastway and its precursor Gatwick Direct (see page 11).

More details of the staff travel survey will be made available in due course in a supporting technical appendix to the strategy and on our website.

www.gatwickairport.com

Gatwick Commuter

Our employee travel plan took a step forward with the launch of Gatwick Commuter in 2006. Essentially Gatwick Commuter pulls all the existing employee surface access work we have been doing into one cohesive strategy, around which the airport community can tailor action plans geared to their needs.

Gatwick Commuter is built on the following foundations:

- Discount on buses and rail travel
- Car sharing scheme
- Cycle and walking strategy
- Staff surveys
- Marketing and communications plans.

Further discussion about how we propose to continue to develop the airport staff travel plan is detailed on page 22.

Strategy – see page 22 for more details

Where we are today

Freight, retail and other movements

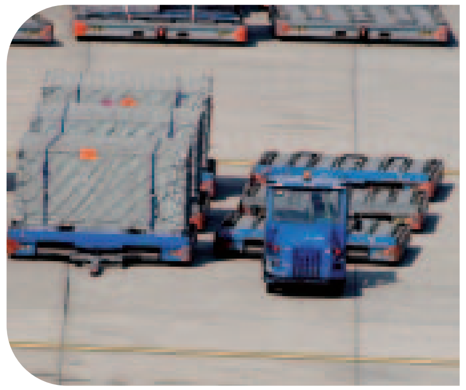


Figure 5 Average daily split of airport-related vehicle trips on landside roads

Air passenger	63%
Employees	19%
Public bus and coach	4%
Crew buses	1%
Courtesy buses	7%
Cargo	2%
Goods and servicing to terminals	2%
Control post movements	3%

Source: BAA

Air cargo and retail

Freight, retail and other movements account for a relatively small percentage of airport-related road trips at Gatwick (see Figure 5).

Gatwick handled around 212,000 tonnes of cargo in 2005/06, which is 30% below the peak achieved in 2000. The vast majority of air cargo is carried in the holds of passenger aircraft with the rest taken by dedicated freighter aircraft. Cargo carried by planes tends to be high value goods like cosmetics, jewellery or bullion, and perishables with tight sell-by dates.

By its very nature, transporting air cargo by road mainly uses HGVs for the onward travel of goods to/from UK destinations. However these movements account for no more than 1% of the total traffic using the M23 spur, the primary cargo route to and from the airport, with many such movements transferring via Heathrow. The lack of a major inter-modal rail freight depot in the region is likely to mean a continued reliance on road for the movement of Gatwick's cargo traffic for the foreseeable future.

The goods traffic around Gatwick is mainly supplying the retail and catering businesses in the North and South Terminals.

Distribution network

The landside perimeter road is an essential part of the distribution network for many of these vehicles. We have recently had to introduce restrictions on access to the tunnel underneath South Terminal, with the result that some movements that previously made use of the tunnel are now required to use the A23 to travel between the south and north sides of the airport.

Strategy – see page 24 for more details

Where we are today

Rail

Figure 6 Rail operators at Gatwick

Rail operator	Service
Gatwick Express	non-stop service to Central London
Southern Trains	high-frequency services to London rail terminals, Brighton and the South Coast
First Capital Connect	services to London City, Bedford and Brighton
Southern/ South Eastern	services to Tunbridge Wells and Horsham
First Great Western	services to Reading for onward travel to the West, Wales and Midlands
Arriva	services to West Midlands and North-West

Transport hub

Gatwick's railway station and rail links are vital factors in the airport's continued development as a regional public transport hub. We work closely with Network Rail and the train operators to provide and market the range of services and connections available from the airport.

Currently, 29% of all passengers who fly from Gatwick travel to and from the airport by rail – that's around 8.6 million trips per annum. For a while, rail struggled to maintain its share of the market in the face of increased competition from car and taxi, coupled with the growth in UK leisure traffic from outside London. However it is now showing positive signs of a healthy recovery, due in part to the growth of low-cost airlines and more trips being made to and from London, but also as a result of heavy investment in new trains and marketing initiatives from train operators.

Network Rail

The station concourse and platforms are owned and operated by Network Rail. The station connects directly to the South Terminal and there is a transit link for passengers to get to the North Terminal. There have been improvements to the station in recent years but access to platforms 3-6 is an ongoing issue due to sub-standard lifts and lack of escalators on platforms 5 and 6. This and all other aspects of the station's future development are under review in a Network Rail study that began in 2007.

Rail services

Six train operators run services from Gatwick, providing links to destinations across the country (Figure 6). The high-speed Gatwick Express connecting the airport with Central London is Gatwick's flagship rail service. The service is key to achieving our target of 40% of Gatwick's passengers travelling by public transport. After lengthy consultation on the future of the Brighton Main Line, the DfT has decided that the Gatwick Express will be retained as a non-stop service between the airport and London every 15 minutes. At peak times, however, trains will run beyond Gatwick to Brighton to provide additional commuter capacity. The potential impact of this on air passengers is discussed on page 18.

There are currently 950 trains serving Gatwick every day, but the lack of early morning and late night services means passengers travelling at those times have limited options, as do employees working shift patterns.

The Cross Country franchise, recently awarded to Arriva, seems likely to result in the removal of the Gatwick–Brighton arm of the network, thus depriving Gatwick of its only through inter-regional rail service.

The future of the Tunbridge Wells and Watford services are also subject to the outcome of ongoing network studies.

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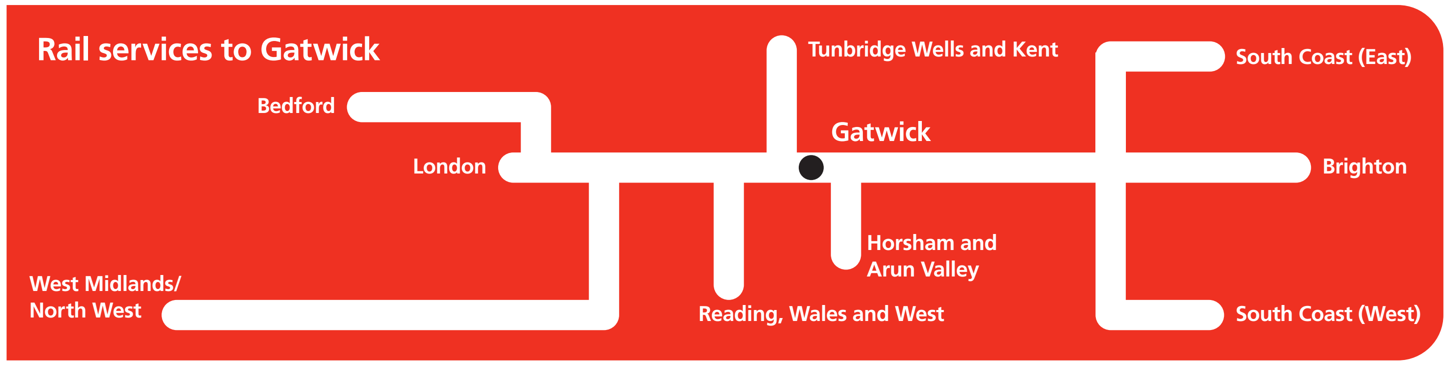


Where we are today

Bus and coach

Affordable alternative

Modern-day coach travel offers a high-quality, affordable alternative to private car or taxi. In 2006, around 1.8m air passengers travelled by coach to and from Gatwick. Although overall market share has declined in recent years, this is attributable to a reduction in the tour coach trade, reflecting changes in the type of passenger using Gatwick. The scheduled national and regional express services continue to account for about 5% of non-transfer passengers.

Coach station

At Gatwick's South Terminal, scheduled coaches pick up and set down on the upper forecourt, giving coach passengers easy, level access to and from the terminal building. Other coach services operate from the lower forecourt. We are currently reviewing the traffic management regime on the forecourts, and working with the operators to ensure that public transport continues to enjoy priority status pending decisions around the design and functionality of the proposed transport interchange (see pages 16-17). There are also separate set down and pick up points for coaches at North Terminal.

Coach services

National Express is the airport's main coach operator and there are also services run by the Oxford Airline and the Gatwick Flyer (to destinations in Essex). On average there are between 450 and 500 daily arrivals and departures, offering services to destinations throughout the UK, either directly or via Heathrow, Victoria or Birmingham. Paradoxically, with the exception of the London–Brighton corridor, the areas most poorly served by coach are the southern Home Counties that collectively make up around 40% of Gatwick's traffic.

Local buses

Since 2000, Gatwick has invested £6 million in local bus services and infrastructure. This includes revenue support for route 200 (former Gatwick Direct) which has recently been extended to Horsham on a trial basis, and certain peak hour services from East Grinstead and Maidenbower. Fastway is the airport's flagship bus service, running along 24km of route network with extensive bus priority, including stretches of innovative guideways that allow the buses to by-pass congestion hotspots. Fastway has proved immensely successful since its introduction in 2003 and now carries over 9,000 passengers a day. Many of these are airport employees, a third of whom live in Crawley and Horley.

Connectivity

To facilitate travel around the airport site, Gatwick and tenants of the City Place Business Park co-fund a scheme allowing free bus travel around the airport. In addition, staff car park shuttle buses provide a link to the various business premises. In 2004, we introduced a trial demand-responsive bus service for airport staff to cover areas not well served by public transport and night time services. The service was withdrawn in 2006 having failed to generate sufficient demand, resulting in an excessive level of subsidy per user. We continue to work with airlines and the rest of the airport community to find an affordable solution that meets the needs of staff and reduces their dependency on private cars.

Strategy – see page 16 for more details

Where we are today

Roads

Current situation

As the UK's second busiest airport, Gatwick is well placed in relation to the national road network. On an average summer day, the number of vehicles entering the airport is 45,000, and a similar number departing, with most of the traffic using the M23 via Junction 9, which connects to the M25 and rest of the UK network.

There are three main entry/exit points to the airport:

- The two roundabouts off the M23 link that provide access to the South and North Terminals
- The A23 Gatwick Road roundabout.

These roads and access points are managed by the Highways Agency (M23) and West Sussex County Council (A23 roundabout). In addition there is a further controlled-access barrier at Povey Cross Bridge. The A23 Longbridge Roundabout to the north of the airport, managed by Surrey County Council, is also a critical junction for local traffic to and from Redhill, Reigate and Horley.

Gatwick manages the landside road system that takes traffic from the external highway network to the various parts of the airport.

Junction improvements

Prior to Gatwick's Surface Access Strategy being published in 2000, a joint Highways Strategy Task Group identified a package of road improvements to enable Gatwick to grow to 40 million passengers. BAA committed to contribute to the cost of certain junction improvements.

The timescales slipped following revised passenger forecasts post 9/11. There has also been a review of the proposed works and the latest position is:

M23 junction 9 – in 2003, the Highways Agency installed dynamic controls on the traffic signals controlling the roundabout, and this has successfully balanced traffic flows off and on to the motorway.

M23 junction 9A – the primary access route to the South Terminal. Installation of traffic lights and road widening are planned for 2008/09.

Airport Way West roundabout – the primary access to the North Terminal. Previous signalling schemes are being reviewed following changes in intra-airport movements. Gatwick is working with the Highways Agency and West Sussex County Council to improve connections between North Terminal and the A23 through the construction of a new link road that will also free up capacity on the roundabout. Programmed for construction in 2007/08.

Other road junctions:

Longbridge roundabout – improved in 2005 to coincide with Fastway's new Horley service. Expected to come under pressure when proposed new housing developments to the north of Horley are completed.

Gatwick Road roundabout – previously judged to have sufficient capacity to handle traffic flows up to 40 million passengers, but needs to be kept under review post-Fastway, and with the redistribution of some airport movements (see below).

Internal road network

Gatwick's internal road network distributes traffic to and from the forecourts, car parks and on-airport hotels. Good traffic management, coupled with forward planning to cope with new airport developments and passenger growth, are essential to avoid vehicles blocking back on to the external highways. Gatwick has developed a CONTRAM (Continuous Traffic Assignment Model) to identify solutions to current and future traffic scenarios, including the impact of new developments and traffic management schemes.

National Cycle Route 21 passes through the airport on a north–south axis. It is the principal pedestrian and cycle access to the airport and links into the local networks in Crawley and Horley. There is also access to the airport via Povey Cross bridge which is convenient for staff living around Charlwood and Hookwood, and from the Balcombe Road for residential areas to the east of the airport.

Strategy – see page 22 for more details

Where we are today

Car parking

Car parking provision

With half of all Gatwick passengers currently travelling to and from the airport by car, parking and pick-up/drop-off facilities are an integral part of the airport's operations. While reducing the number of airport-related car trips is a key goal for us, we recognise that some passengers will always prefer to drive to Gatwick or indeed may have no other practical choice. Thus car parking provision is a residual need, to meet the requirements of the reducing proportion of our passengers making surface journeys by private car, as the public transport mode share grows towards 40%.

There are different types of airport-related parking:

- Air passengers – comprising on-airport – long stay; short stay; short stay kiss-and-fly; and off-airport – long stay and valet parking
- Rail users (commuters/leisure) – short-term parking
- Staff – BAA controlled car parking; leased areas
- Contractors, deliveries and visitors.

For air passengers, the actual number of car trips to or from Gatwick, and the requirement for car parking spaces, is strongly influenced by the manner in which those cars are used as Figure 7 demonstrates.

The significance of this is that, on average, the first category of car users were responsible for more than twice as many road vehicle trips to/from Gatwick as the other two, principally because each car driver, prior to meeting or after dropping off passengers, makes an unaccompanied trip. The same is true of most taxi trips.

Public car parking

Short-stay spaces are situated on-airport in multi-storey car parks (MSCPs) close to the airport terminals. With a combined capacity of 4100 spaces, these car parks are primarily used by people dropping off or picking up air travellers (kiss-and-fly).

The combination of easy road access and first-class rail connections to London also makes Gatwick an attractive railhead for commuters. Some are driven to/collected from the airport but there are also regular commuters who park on-site. To free up parking space for air travel-related journeys, we have created 200 dedicated spaces for commuters through the removal and reallocation of some staff spaces to more remote locations.

There are approximately 41,000 authorised long-stay spaces located both on- and off-airport. Parking duration varies according to journey purpose and type of flight, ranging from an average of 12 days for a typical long-haul flight to just over three days for a domestic flight. The current average across the airport is around seven days. Length of stay is directly related to the overall number of spaces required: generally speaking, the longer the average length of stay, the greater the total number of spaces required.

BAA's parking charges include a levy that is used to finance various transport initiatives in support of our targets.

A growing problem for the airport and the local community is that of unauthorised off-airport parking sites. In 2006, they accounted for some 5,600 spaces. In recent years, the situation has been compounded by the proliferation of unlicensed off-airport 'Meet and Greet' services. These are not only undesirable from an emissions point of view (cars are often driven over 25 miles roundtrip from the airport to be parked) but often fail to meet basic customer service standards.

Staff car parking

Staff car parking facilities are provided within the boundary of the airport in:

- BAA-managed car parks, used by employees of many airport companies. Car park passes are issued for a price that includes a contribution to the Transport Levy fund. There are currently 7,000 of these spaces at Gatwick spread between ten car parks around the airport
- Tenanted car parks within leased areas, managed by the tenant for use by their staff. The number of such spaces in use varies, but is in the range of 2,500 to 3,000 in total.

The shift work nature of an airport enables us to make productive use of the spaces available and in BAA-managed car parks there is an average of 2.5 passes issued for each space.

Strategy – see page 24 for more details

Figure 7 Breakdown of the 51% of passengers arriving/leaving by car in 2005

27% travelled in cars that were driven away rather than parked at/near Gatwick (kiss-and-fly traffic) or which were parked in short-stay car parks (mostly by drivers who were seeing off or meeting air passengers)
13% were parked in on-airport long-stay car parks
11% were parked off-airport, at hotels or in private car parks

Source: CAA Airport Survey

Where we are going

Targets

Gatwick's Surface Access Strategy

"A strategy focused on building for the future – engaging with our business partners and stakeholders to ensure that our passengers and employees have access to a range of travel options that meet their particular needs."

The strategy is built around three principal objectives:

- **Reducing rate of growth of road trips**
- **Easing congestion**
- **Managing on-site emissions**

These are described in pages 16 onwards. As a measure of how effective the strategy is, we have agreed the following targets and performance indicators.

Air passengers mode share targets

- 40% of all non-transfer passengers to use public transport for travel to and from Gatwick when passenger throughput reaches 40mppa (current figure is 35%)
- An interim target of 36% non-transfer passengers to use public transport by 2008

A combination of factors including Gatwick's passenger mix, the shift in early morning/late evening passenger arrivals/departures and the capacity constraints on the Brighton Main Line mean these targets are challenging, but achievable given the commitment of all the relevant players.

The headline target is an average across the year and performance will vary according to season, time of day and different passenger types. To support the air passenger overall target, we have set secondary targets for the six transport corridors that account for 50% of passenger traffic (Figure 8). Focused strategies for these corridors represent opportunities for making significant impacts on transport mode share.

Staff mode share targets

Gatwick has made good progress in encouraging more employees to travel by public transport since 2000. The introduction of the Fastway bus service covering Crawley/Horley and increasing numbers of staff travelling by train from Croydon and Brighton are among the highlights. We have set stretching targets for staff from those three areas:

- 20% of staff living in Crawley/Horley to use Fastway service to travel to work by 2008, three years after completion of the Fastway network
- 45% of staff living in Croydon, Bromley and Merton to travel to work by public transport by 2015
- 30% of staff living in Brighton and South Coast to use alternatives to single use private car to travel to work by 2015.

Road trips

The Surface Access Strategy and supporting mode share targets are aimed at limiting the rate of growth of vehicle trips to and from the airport. We have agreed two airport-related road trip targets applicable to a 40 million passengers per year airport:

- The number of trips to and from Gatwick should not exceed 7,850 in the morning peak hour (8am to 9am)
- The number of trips to and from Crawley and Horley should not exceed 1,000 in the morning peak hour.

The actual number of peak hour road trips in 2005 averaged 5,700. Daily road trips are variable but, on an average summer day, when some 120,000 passengers would fly to or from the airport, and some 18,000 staff would report for work, the number of vehicles entering the airport is of the order of 45,000 with a similar number departing, most of them on the M23. The ratio of vehicle trips to air passenger trips on such a day is around 0.75:1.

Achievement of our transport targets should lead to a reduction in this ratio over time, and we are aiming for a ratio of 0.70:1 or lower by 2015. We will work with our stakeholders to determine the best way of monitoring and reporting against this performance indicator.

Automatic traffic counters are the main source of data for measuring performance in this area, but for trips in the local area additional data will be derived from a local area traffic model.

Full details of the strategies, actions plans and commitments made by Gatwick that will help it achieve these targets for air passengers, staff and road trips appear in the next section.

Figure 8 Corridor targets

Corridor(% non-transfer passengers)	% non-transfer passengers using public transport: 2005	% non-transfer passengers using public transport: Target 40mppa	Additional passenger trips using public transport in each corridor
Central London (10.8%)	82.4%	90%	960,000
Kent (11%)	9.6%	15%	280,000
Brighton & Hove (3%)	44.8%	50%	150,000
Rest of Sussex Coast (4.9%)	18.0%	25%	180,000
M3 (7.4%)	17.4%	20%	150,000
M4/M40 (13.0%)	26.5%	30%	410,000

Source: CAA Airport Survey

Objective – Reducing the rate of growth of total private car and taxi to and from the airport by encouraging greater use of public transport

We will achieve this by:

- Creating a 21st-century passenger transport interchange for Gatwick
- Working with operators to promote and develop the range and quality of public transport services to and from the airport
- Incentivising staff to use public transport, car share, cycle or walk to work.

Creating a 21st-century passenger transport interchange for Gatwick

Transport hub

Achievement of the 40% public transport target means that usage of rail and coach services by air passengers needs to grow from around 10 million trips in 2006 to around 14 million by 2015. In addition, there are staff and other airport visitors to take into account as well as those using Gatwick as a domestic transfer point.

From an airport operator's perspective, our number one strategic priority in terms of surface access is to make sure that we have first-class transport interchange facilities, something that needs addressing as current and projected passenger numbers have outgrown present infrastructure. Moreover, we recognise that Gatwick, because of its location in the heart of the South East and being a major international airport, has developed as a regional transport hub in its own right, and a key player in the South East Plan's hubs and spokes strategy for the region.

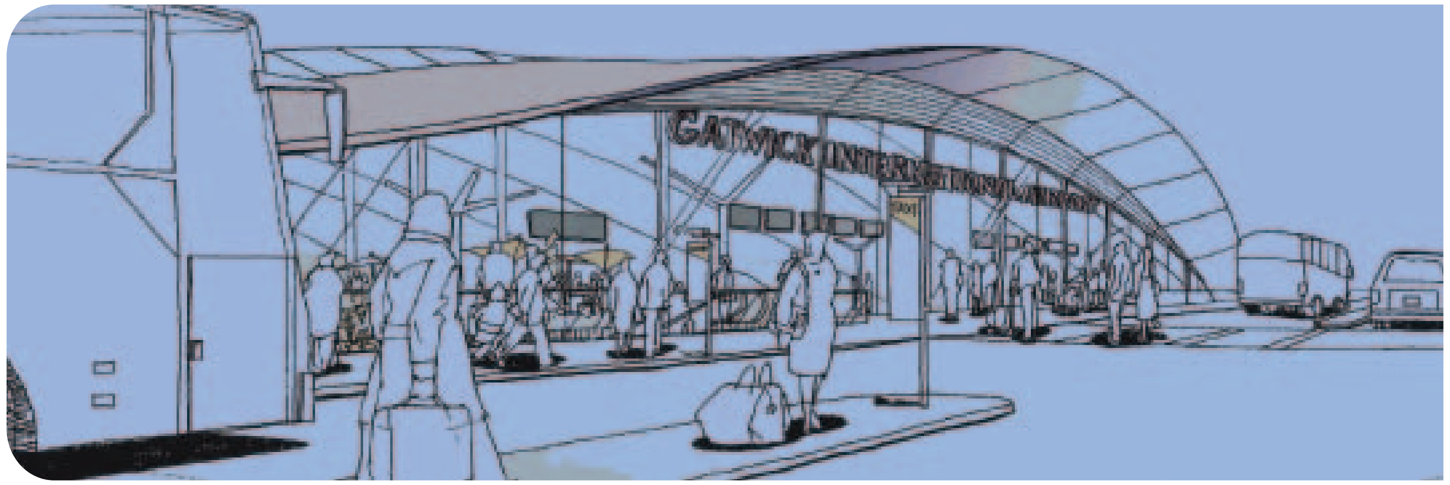
Rail and coach interchange

The Network Rail study into the redevelopment of the rail station and associated works is potentially the key to taking Gatwick's public transport facilities to a whole new level. There are two main elements of the study:

- Looking at the opportunities to create additional track and platform capacity including improved vertical access and, notably, terminating facilities for Gatwick Express-type services with direct access to the fast lines
- Concentrating on above-ground facilities and we are working closely with the study team to identify opportunities to create a 21st-century front door to Gatwick, with a high-quality passenger transport interchange (PTI) between all modes.

Network Rail aims to identify a preferred design option by early 2008 with a view to construction beginning in 2009 and completion of the rail station works in 2011. This is subject to Network Rail securing a funding package with external stakeholders and to planning consent.

We are reviewing the options for a long-term strategy for coach facilities in the context of the PTI. Our policy is to give priority to public over private transport on our forecourts, and the aim is to integrate the coach station within the PTI. This will improve access not only to the terminal building but also with other transport modes to support Gatwick's role as a regional hub.



Local bus interchange

Logically, it would be preferable to co-locate rail and national/regional coach services with local buses. Unfortunately, the geography of Gatwick's roads does not lend itself to this and, for the foreseeable future, most local buses, including Fastway, are likely to continue to operate via the A23 and Airport Perimeter Road. We are working to ensure that the facilities and pedestrian routes to and from the bus stops are developed in the context of the PTI, with good wayfinding to the terminals and other transport modes.

Working with operators to promote and develop the range and quality of public transport services to and from the airport

Identifying customer needs

Gatwick's ability to achieve its public transport targets depends on providing air passengers and employees with the services they need and making sure that capacity matches demand.

In order to do that, we need to consider how the airline markets are likely to develop in the future, and the effects of external influences. We have already witnessed the growth of the low-cost airlines, increased popularity of short breaks and self-service check-in. Looking ahead, we need to factor in issues such as increased average aircraft loads, the increasing use of remote check-in and the impact of changes in security procedures. We also need to consider how the private versus public transport debate will shape up in relation to future government policy on road pricing and carbon trading. These are just some examples of the sort of issues that will have a bearing on how we and our business partners tailor the public transport offer in the future.

So an understanding of the passenger forecasts will help to identify the different passenger characteristics and influences on choice of travel to the airport: for example, the once-a-year, long-haul family holiday maker may have different needs and values from business travellers or a couple on a short break to Europe. And foreign visitors may have a different travel pattern compared to UK residents. To this end, we are working in close partnership with our airlines; understanding more about their customer base will help us shape the public transport options of tomorrow.

The same goes for airport employees and staff travel. By developing close relationships with our business partners, we can get to understand better their particular travel to work needs which will help us develop the right package of travel options.

In short, the more we know about our customers, passengers and staff, the better chance we and our partners have of developing the:

- Right type of service
- At the right time
- At the right price.

Developing a 21st century experience

- Working with Network Rail to create a new rail station for Gatwick
- Developing integrated bus and coach and other onward travel facilities
- Delivering a seamless travel experience for our passengers
- Harnessing new technology.

Objective – Reducing the rate of growth of total private car and taxi to and from the airport by encouraging greater use of public transport

The airport is well served by existing rail, coach and bus services but we continue to work with operators to explore new routes and marketing initiatives to drive us towards the 40% target.

The growth of low-cost passenger traffic could be an advantage: these passengers generally have less luggage and are more likely to travel by public transport. The influx of European low-cost carriers also means there will be more foreign leisure passengers, the majority of whom are travelling to London – hence the need to maintain a quality rail link.

The challenge for public transport is to provide the right services, running at a time to suit flight schedules, particularly the early morning departures and late evening arrivals. Here the operators face stiff competition from local hotels offering heavily discounted car parking; and, for those not wishing to stay overnight, the prospect of relatively empty roads during the night time period makes driving an even more attractive proposition.

Rail services

More than three quarters of air passengers travelling by public transport to Gatwick do so by rail. We will continue to work with the rail operators to improve existing services, explore joint marketing opportunities, promote online ticket sales and work with airlines to understand more about their customer profiles so timetables can reflect the changing patterns of flight times.

We welcome the recent decision on the future of the Gatwick Express that retains a 15 minute non-stop service to London. It means that we can now move forward on the detail and work with the rail industry to make sure it best serves the needs of air passengers.

In particular, we need to assess how the through trains to and from Brighton during the commuter peaks will be able to continue to provide the same high levels of service for air passengers that the dedicated trains currently provide. The type of rolling stock to be used on these services is critical – not just ensuring that adequate seating and luggage capacity is provided, but also that the door arrangements are able to cope with the limited boarding and alighting times at Gatwick.

Looking further ahead we need to ensure that the retention of the Gatwick Express is preserved in the new Southern franchise due for renewal in 2009.

The issues of improving existing services and opening up new routes are inextricably linked with adequate levels of investment in the railway infrastructure. We are working with Network Rail to ensure that the current station study includes provision not only for dedicated express services to London, but also safeguards for improved east–west links – in particular a half-hourly frequency on the highly popular Gatwick–Reading service as envisaged in the current Greater Western rail franchise specification.

There is also encouraging news to report on the Thameslink Programme with the recent Government go-ahead for this strategic rail link. We welcome this much-needed project, not only in the context of facilitating better north–south links to Gatwick, but also enhancing the existing service to the City and Kings Cross/St Pancras. The first phase of the programme will see increased capacity in the form of 12-coach services from December 2011.

We remain concerned, however, at the current proposal to remove from December 2008 the direct hourly cross-London service to Watford, which provides not only a valuable link to destinations in West London, but also gives those from further afield an alternative to travelling via Central London.

Together with the threatened withdrawal at the same time of through Cross Country services, this will reduce the range of travel options available to our passengers, at a time when Victoria Underground station faces a six-year reconstruction programme. We will therefore work with the DfT, train operators and other bodies to try and ensure retention of good cross-London and inter-regional train links via the West London line for Gatwick users.

Coach services

Travelling by coach offers passengers a wide variety of routes, competitive prices, high standards of comfort, assistance with luggage and easy access to services from the airport. Generally speaking, there is capacity on existing coach services and room to grow on the existing network. The flexibility of the coach business means operators can respond more quickly than rail and bus operators to market demands to open up new routes.

Express coach has successfully built up market share on certain routes. For example, on the M4 and M40 corridors to the West, South Wales and West Midlands, coach has a mode share of 17%, compared to the average of 7% for all passengers. This shows what can be done if a route is successfully targeted and marketed.

Developing airport-focused transport solutions

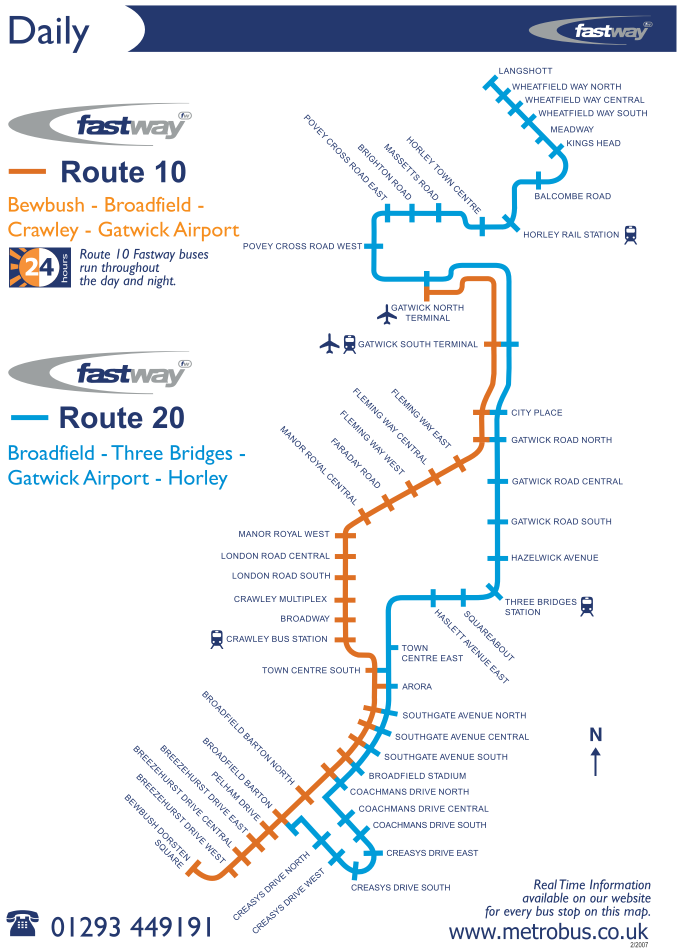
- Ensuring the future of Gatwick Express
- Promoting London/Brighton and cross-London links
- Improving east/west connections
- Meeting passenger needs – working with operators to offer the right product.

Objective – Reducing the rate of growth of total private car and taxi to and from the airport by encouraging greater use of public transport

We will continue to work with Gatwick's existing operators – National Express, Go-Ahead's Airline (Oxford) and Gatwick Flyer (Essex) – to promote a high-quality service to our air passengers and grow the coach modal share.

We also wish to engage with other market leaders to promote the potential of Gatwick as a destination and identify synergies between their growth strategies and our corridor targets, particularly towards Kent and down the M3 corridor to Hampshire and Dorset.

Figure 9 – Fastway network



Even in the transport corridors that are well served by daytime services, there is the potential to introduce new early morning or late night services for passengers flying/arriving at either end of the day and employees working shift patterns.

However, the economics of coach operations are a potential constraint on the development of new routes. We are particularly interested to see how the coach industry responds to the opportunities that the opening of Heathrow's Terminal 5 will present, and will explore how this might improve the economics of coach services to Gatwick. Specific actions in support of the corridor targets, which support our commitments and obligations, are shown in Figure 10.

Travel corridors

There will be a particular focus on key transport corridors. These corridors represent our best opportunity to increase mode share and it makes sense to focus marketing and investment opportunities in these key areas, whilst continuing to work on other geographic areas as part of the overall 40% target.

Taxis

Although not traditionally regarded as public transport, we are keen to improve the sustainability of this highly flexible mode of transport. We intend to do this by encouraging operators to proactively market taxi-sharing and to seek bookings for in-bound journeys to the airport, thereby reducing the number of empty return taxi movements.

Local buses

In parallel with the promotion of regional and longer distance public transport services, there is a strong focus on developing the local bus network. This is integral to the Gatwick Commuter staff travel programme (as detailed in later pages) but is also aimed at local residents that fly in and out of Gatwick.

Development of the flagship Fastway network as shown in Figure 9 is seen as the key to achieving a real shift in travel behaviour in the local area.

We are committed to working with our Transport Forum partners to look at ways of further developing the Fastway and local bus network:

- Continue to improve the quality and frequency of existing services with a particular focus on early morning, late evening and weekend services
- Explore potential to extend the Fastway brand to Maidenbower, Redhill, East Grinstead and Horsham
- Where appropriate and where there is thought to be the potential to grow the public transport mode share, consider providing financial support to enable the operation of services that would not otherwise be commercially viable
- Within the context of the local development frameworks, explore the potential for one or more park-and-ride locations with quality bus links to the airport
- Ensure that on-airport local bus waiting facilities and supporting road infrastructure are fit-for-purpose, conveniently situated for both passengers and staff, equipped with real-time information and with good wayfinding to and from the terminals.

As a measure of our support for local bus services, we have waived all local bus departure charges since 2000 and intend to continue this policy for the time being, subject to operator compliance on engine emissions and other licensing regulations. The value of this concession is estimated to be around £150k per annum, based on current annual movements.

Figure 10 – Key transport corridors

Corridor	Public transport target	Action plan
Central London	90%	• Keep Gatwick Express as a dedicated premium brand for air passengers • Promote Southern and First Capital Connect as complementary services to Victoria and the City • Closer engagement between airlines and train companies to promote London rail connections • Continue to support the Thameslink programme
Kent	15%	• Investigate trialling new coach service(s) to Medway towns and to East Kent • Work with train operators to promote Gatwick/Tonbridge connections and services to Kent via London
Brighton & Hove	50%	• Continue promotion of existing network, including bus/rail deals • Investigate potential to introduce earlier/later train services
Rest of Sussex coast	25%	• Joint marketing opportunities with rail and coach operators
M3/A31	20%	• Investigate trialling new direct coach service to Poole via the Solent region • Review business case for Woking/Gatwick railair coach link • Joint marketing opportunities with rail and coach operators
M4/M40	30%	• Work with First Great Western to promote Reading/Gatwick link and increase frequency • Joint marketing opportunities with First Great Western/Arriva • Continue to build on the success of express coach along this corridor

Objective – Reducing the rate of growth of total private car and taxi to and from the airport by encouraging greater use of public transport

Incentivising staff to use public transport, car share, cycle or walk to work

Gatwick Commuter

Whereas most airport passengers visit the airport once or twice a year, the airport's 25,000 employees work an average of around 200 days a year. The total number of journeys made by staff to and from work – around 10 million over a year – makes reducing their road trips a key part of our future plans.

Our strategy for employees focuses on reducing single car occupancy. We will be working harder to understand the transport needs of airport employees through on-going surveys and by developing closer links with our airlines and other businesses. Many other local businesses are facing similar employee transport issues to Gatwick and there is scope for joined-up marketing campaigns to reduce car usage.

Our employee travel plan is encapsulated within the Gatwick Commuter scheme. Our approach varies between different corridors. For example in the areas local to Gatwick we have successfully worked with the local authorities and bus operator to develop a network of bus services to suit employee shift patterns. For employees in Brighton and the South Coast we have been working to encourage greater use of trains and car sharing. To help us monitor the success of Gatwick Commuter we have agreed three mode share targets for three major recruitment areas and will carry out regular staff surveys to monitor performance (see page 14).

Public transport

The development of the highly successful Fastway bus service is a prime example of what can happen when Gatwick, airport employers, bus companies, business associations and local authorities work together in sourcing public transport solutions.

Since 2003, we have invested £3 million in the Fastway 24-hour bus service for employees who live in Crawley-Horley. We've been rewarded with a real turnaround in the number of employees from these towns (who comprise a third of all airport employees) using the service. The 2007 survey revealed that 18% now use local bus compared to only 5% ten years ago.

The Gatwick Staff Travelcard is a powerful incentive for staff to use the bus, offering a substantial discount over standard bus fares. We will continue to work with the operator to try and ensure continuity of the scheme and to look at ways of refreshing the marketing in order to maintain and increase awareness of the benefits on offer.

For many employees, the rail network is a convenient and, with the attractive fare discounts available, affordable way of getting to work. Staff usage of the rail network is highest among employees travelling from Croydon, London and Brighton, with substantial numbers also from places like Horsham and Redhill.

Managing a dynamic travel plan for employees

- Maintaining and promoting a travel plan for the airport community
- Making public transport more competitive – price, frequency, hours of operation and service proposition
- Encouraging car sharing, cycling and walking
- Co-ordinating with business partners and the local community to achieve common goals.

Our task is to build on those trends and encourage more employees, particularly those living along the South Coast, to consider the train as a viable alternative to the car. Extending the timetable at either end of the day to better meet air passenger travel requirements would also benefit staff working early and late shifts.

As with bus services, all airport staff are eligible for a Gatwick Traincard which gives a 34% discount on most train fares across the South East rail network. We will continue to work with the rail operators to promote the scheme to all those working at the airport, which includes bespoke travel leaflets for the most popular residential areas highlighting the savings in both journey time and travel costs compared to car.

Car sharing

One of the main thrusts of Gatwick Commuter is to promote incentives to reduce the number of single occupancy car trips to and from the airport.

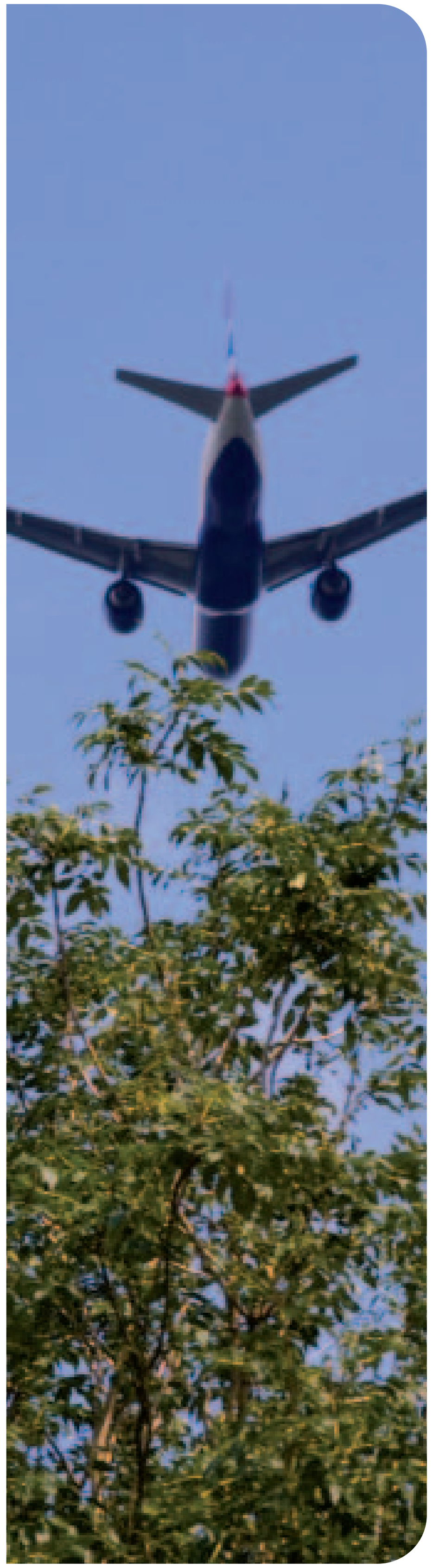
The majority of staff working at the airport currently benefit from free car parking (although their employers have to pay for the cost of passes). The usage of such spaces is maximised due to the 24-hour shift working at the airport, with the result that we only need to provide one space for every 2.5 passes issued.

One of the consequences of shift working is that some people, for example those who work in our security teams, will still need to drive to work because there are no convenient buses or train at the times when they need to travel to and from work. As a result, we recognise the need to encourage more car sharing, and to help us in this we have recently relaunched our carshare scheme in conjunction with Liftshare.com, which is used by our local authority partners.

Cycling and walking

Cycling and walking are small but important components of our strategy. The Cycling and Walking group of Gatwick's Transport Forum oversees the development of the local network, including providing cycling facilities and publicity material.

Building on the incorporation of national cycle route 21 through the airport, we investigated the feasibility of establishing a dedicated link between North Terminal and Longbridge Roundabout in Horley to enhance the cycling and pedestrian network. The working group will use the results of the study to establish a programme to further improve accessibility to Gatwick in line with current and future usage levels.



Objective – Easing congestion by better traffic management and implementing strategic road improvements

We will achieve this by:

- Implementing highway access improvements
- Working with regional and local highway authorities to improve strategic connections and the local road network
- Ensuring that the development and management of the on-airport road network supports the sustainable growth of the airport
- Pursuing a managed approach to car parking that is built around our public transport targets and is consistent with local authority policies on off-airport parking.

Whilst the major focus of the 2015 strategy is on increasing public transport usage, it is just as important that passengers choosing to drive to the airport are able to arrive and depart safely and swiftly. Above all, we wish to ensure that growth in airport-related traffic does not significantly increase congestion either on the airport roads or those in the immediate vicinity.

The car parking section on page 13 looked at the historic and current situation regarding access to and from the airport and planned works in the future. Moving forward, our strategy is to ensure that the road networks and car parks can cope with our projected growth between now and 2015.

Implementation of highway access improvements

- M23 Junction 9 – Work with Highways Agency and other stakeholders to understand the need for further capacity enhancements and associated investment programme
- M23 Junction 9A – Highways Agency is proposing to install traffic lights and carry out selective widening of approach lanes – implementation planned for 2008/09
- North Terminal Roundabout – completion by Spring 2008 of the A23 link scheme that is currently being progressed with West Sussex County Council to facilitate local bus access to South Terminal which will also provide capacity benefits to the roundabout. We will then monitor the traffic flows around the roundabout to determine what, if any, additional measures may be required to maintain traffic flows and when such measures might need to be implemented.

Working with regional and local highway authorities to secure improvements to strategic connections and the local road network

As an airport operator, we have no direct control over priorities and investment in the external road network. However, we press the case for timely investment through our work on the Gatwick Area Transport Forum and bodies like the West Sussex Economic Partnership and the South East Economic Development Agency.

In this context, continued delays to the much-needed improvements to the A23 Handcross/Warninglid section and A27 at Worthing, Arundel and Chichester are detrimental to the South East economy in general as well as affecting future accessibility to Gatwick. Both the West Sussex County Local Transport Plan and the Regional Transport Strategy note the importance of these schemes, and whilst the A23 and Chichester are now on the list of government-approved schemes, the extended timeframe for their completion (2011-2016) seems likely to lead to worsening congestion generally, and delays getting to and from the airport.

In terms of local road access, we will work with West Sussex County Council and Surrey County Council to keep under review performance of the A23 and adjacent junctions, including the proposed new link road to the Perimeter Road.

Ensuring that the development and management of the on-airport road network supports the sustainable growth of the airport

Internal road system

For our internal road system, our strategy needs to complement the growth expectations of South and North Terminals respectively. In conjunction with the airlines, we are looking at alternative growth scenarios for the two terminals and part of that process involves considering the surface access implications of the different options, including the supply and location of future car parking capacity. So just as we have an agreed strategy to improve the external links into the airport, we are developing a landside roads strategy to help us develop a coherent approach to improving access and movement on the internal road network.

South Terminal

Development of the South Terminal forecourts is constrained by the railway on one side and the short-stay car parks on the other. The roads are prone to congestion at peak times, especially during the summer, hence our strategy is to use traffic management to make the most efficient use of the space available, whilst seeking to accord priority to public transport, and conversely make 'kiss-and-fly' a less convenient and attractive option. In June 2007, we restricted access to the upper forecourt to scheduled coaches, airport taxis and BAA long-stay parking shuttle buses. Private car drop-off takes place on the lower forecourt with all pick-up traffic diverted to the short-stay car parks with a new reduced tariff for stays under 15 minutes. We will monitor the success of this to help plan for the future.

The long-term development of the forecourt and coach station will be influenced by the outcome of the Network Rail station study and lie at the heart of the aspiration to develop the airport as a major regional Public Transport Interchange.

Objective – Easing congestion by better traffic management and implementing strategic road improvements

North Terminal

The North Terminal forecourts are less prone to congestion than the South, but face significant growth in future years as we work with the airlines to maximise the capacity of the single runway airport. Even with higher public transport usage, this will put increasing pressure on the forecourts and car park access routes.

In addition, the performance of the road system is affected by the proximity of the Airport Way roundabout, so we need to consider the close interaction between the two and the proposed capacity enhancements to the latter.

Road access charging

BAA has indicated its support for the introduction of road access charging as a demand management tool linked to major airport development.

We are investigating whether it would be feasible to introduce such a scheme at Gatwick, but have not yet formulated any specific proposals or work programme. If we were to do so, we would consult all the relevant business partners and other stakeholders before such a scheme was implemented. If an airport-specific charging scheme were to be introduced at Gatwick, funds would be ring-fenced and invested in schemes to facilitate the responsible growth of the airport.

Pursuing a managed approach to car parking that is built around our public transport targets and is consistent with local authority policies on off-airport parking

Page 13 describes the current situation regarding the provision of airport-related car parking, both air passenger and employee. It is clear that even taking account of the aim to grow the air passenger public transport share to 40%, the projected growth in passengers will require additional car parking.

The purpose of this section is to set out our proposed car parking master plan that will then form the basis for bringing forward specific proposals for when they are required. In addition, we aim to rationalise the planning status of the various existing car parking areas in the airport's north-west zone.

Car parking strategy

In moving forwards to 2015, our strategy is guided by the following principles:

- Continue to work towards achievement of our public transport targets
- Enable our passengers to enjoy a choice of travel options and parking products
- All additional airport-related car parking to be accommodated on airport
- Make the most efficient use of the combined on-airport supply – public and staff
- Optimise car parking locations in relation to South and North Terminal demand
- Minimise total vehicle kilometres travelled on-airport
- Restrict access to terminal forecourts by private car users
- Encourage pre-booking, but ensure sufficient spaces are available for those customers that turn up on the day

Managing the car
- Improving access to the airport
- Controlling access to forecourts
- Tackling 'kiss-and-fly'
- Developing and managing on-airport parking.

- Implement a charging structure that:
  - Maximises yield and flexes according to season and available capacity
  - Includes a levy on all transactions that is ring-fenced to finance transport initiatives that support our surface access targets
  - Establishes differential charging for staff parking according to proximity of car park to workplace and the economic value of the land that the spaces occupy.

We need to acknowledge that there is a risk involved in using price to suppress peak demand. Whilst it tempers on-airport demand for long-stay parking, and probably does influence some people to use public transport, it also has three potentially adverse consequences:

- Some switch to taxi, doubling the number of road trips
- Some switch to kiss-and-fly, also doubling road trips (although the intention is to restrict forecourt access for private users in the future which could put more pressure on short-stay car parks)
- Increased pressure on off-airport sites and encouraging growth in unauthorised operations.

Car parking is a residual component that takes into account our various public transport targets as well as a drive to restrict and discourage kiss-and-fly traffic. Our forecasts also take into account factors such as length of stay, group size, market mix and the impact of holiday peaks. Using this approach, we estimate that the required scale of public car parking provision will be:

- In the range 53,000-57,000 long-stay spaces (combined on- and off-airport)
- Around 3,200 short-stay spaces at South Terminal
- Around 2,500 short-stay spaces at North Terminal.

The detailed assumptions behind these forecasts and supporting demand/capacity schedules will be contained in a supplementary technical appendix to this strategy document, and will be reviewed annually with the local authorities.

There are currently estimated to be around 5,000 spaces in a variety of off-airport sites that do not have planning permission for airport-related car parking. It is assumed that between now and 2015, the trading standards agencies will have made progress in clamping down on such operations. To the extent that they succeed, and assuming no increase in authorised off-airport parking, this will put greater pressure on the airport to absorb future demand.

On the basis of the above forecasts, the on-airport supply may need to increase by 10,000 to 12,000 long-stay spaces by 2015 depending on the extent of off-airport parking that remains. Moreover, if we are to succeed in our objective to locate car parking closer to the terminal through which our customers are travelling, the focus of these additional spaces needs to be around South Terminal.

Currently, about 30% of South Terminal's long-stay demand, requiring about 6,000 spaces, needs to be accommodated in the north-west zone of the airport which is estimated to add an average 14 kilometres to every return journey made by customers parking there. We therefore intend as part of our on-going dialogue with local authorities to investigate how we can best achieve this objective within the confines of the airport boundary and in the context of local land use policies.

Objective – Easing congestion by better traffic management and implementing strategic road improvements

For short-stay users, we have recently completed a programme of substantial capital investment to refurbish the multi-storey car parks (MSCPs), and we also plan to provide additional short-stay capacity at North Terminal to some 2,500 spaces. We do not currently anticipate the need to create additional short-stay capacity at South Terminal before 2015. However, some modifications to the layout of the MSCPs may be necessary as a result of the desire to remove kiss-and-fly/meet-and-greet traffic from the forecourts. We may also have to expand the dedicated facilities for rail commuters (in the surface car park in front of the Hilton Hotel) in order to free up capacity for bona fide airport users.

There are no plans to increase the overall number of staff car parking bays, despite a projected modest increase in the size of the airport workforce as the airport grows to 40 million passengers per annum. Instead we anticipate growing use of public transport among those employees for whom this is a realistic option, plus a sustained drive to encourage more car sharing. We intend to promote the latter by the creation of more dedicated car sharing bays with priority pedestrian access to the terminals or connecting shuttle services. We also intend to introduce a differential charging policy to employers that better reflects the value of the space in relation to its proximity to workplace, and this is expected to provide a further incentive to business partners to promote the travel alternatives to their staff.

Strategic park-and-ride

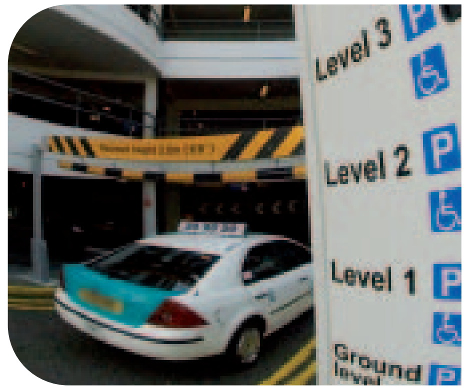
We remain open to the concept of an airport-related park-and-ride operation at one or more locations adjacent to the strategic highway network within a 30-45-minute journey time radius of the airport. They have the potential to fill the gap that conventional public transport links to the airport are unable to cover on a commercial basis. The onward journey to the airport would either be by coach or, subject to location, rail.

We will work with the Regional Assembly and relevant local authorities to explore the feasibility of establishing such an operation and synergy with other local transport initiatives. In the event that any significant airport park-and-ride operation is implemented within the timescale of this strategy, this would be taken into account in future planning of parking requirements on the airport.

Objective – Managing on-site traffic emissions

We will achieve this by:

- Inclusion of controls in licensing and concession agreements
- Reducing total distance travelled within the airport complex.



The main focus of this strategy combines reducing car dependency among passengers and employees, and ensuring that those who do travel to the airport by road are able to do so safely, swiftly and with minimal congestion. Having the right roads infrastructure in place is a key factor in keeping the traffic moving and avoiding unnecessary queuing. At a local level, however, there are other measures that can be taken to manage vehicle emissions as part of a strategy to keep air quality within reasonable limits.

Inclusion of controls in licensing and concession agreements

Our approach to managing air quality recognises the importance of reducing vehicle emissions and encouraging use of cleaner fuels. Airside vehicles are a particular focus (see below). As an airport operator we can exert greatest influence in this area, through both vehicle licensing and ensuring compliance with airfield instructions.

As far as landside operations are concerned, our licensing and concession letting regulations require public bus and coach operators, car park and hotel courtesy buses, and airport taxi companies to use modern, low emission or alternative fuel fleets. We also encourage drivers of vehicles to switch off engines whilst stationary.

Reducing total distance travelled within the airport complex

One clear way to reduce the contribution of airport-related vehicles to local emissions concentrations is to reduce the total distance travelled on airport roads. Apart from the general efforts to encourage greater use of public transport and reduce 'kiss-and-fly' traffic, another area to explore is the potential for achieving greater efficiencies in the use of road space by airport-related activities such as goods deliveries, landside/airside access procedures, coach and taxi feeder parks, car rental operations and on-airport car parking. In particular our long-stay car parking strategy seeks to achieve a better geographical balance of spaces between North Terminal and South Terminal to reduce unnecessary mileage. We will be looking at this as part of our airport development plans in partnership with the various stakeholders.

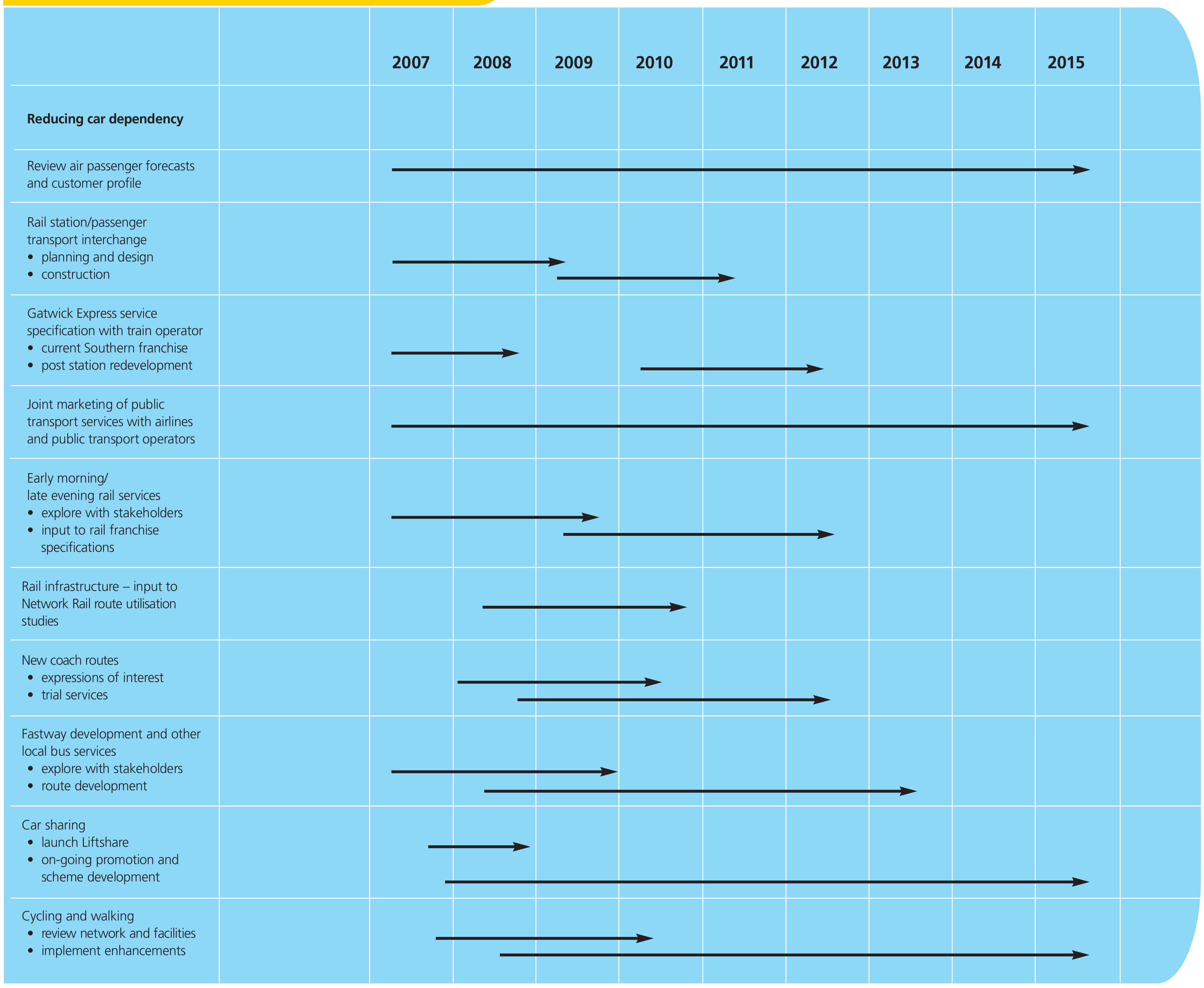
Airside vehicle emissions reduction strategy

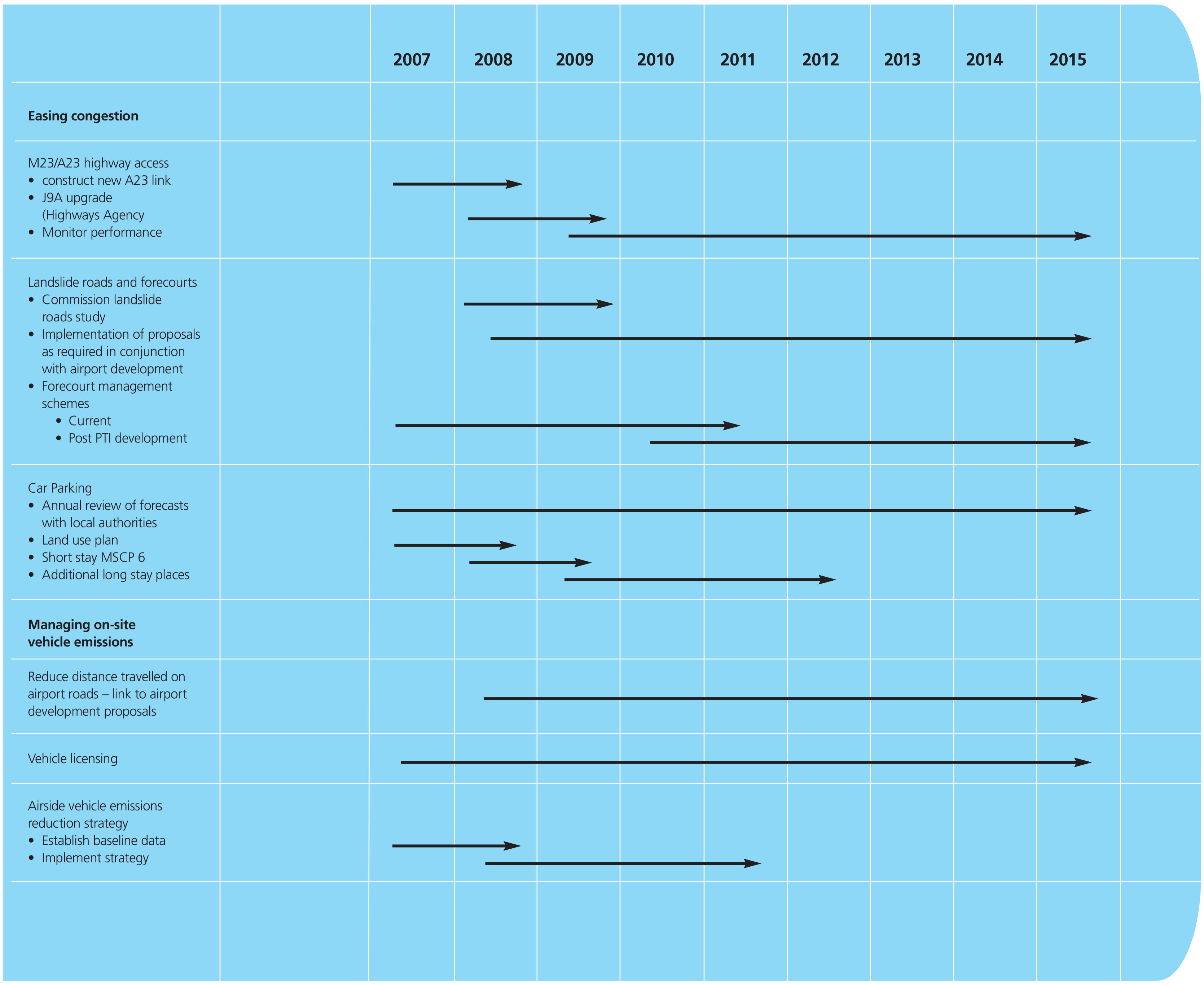
The emissions inventory for 2002/3, conducted by AEA Technology, identified that airside vehicles and plant contributed an estimated 114 tonnes of NOx (Oxides of nitrogen), which accounts for approximately 6% of airport-related NOx emissions. A wide variety of vehicles operate airside at Gatwick, ranging from small road sweepers that access the tightest areas on the airfield to pushback tugs that manoeuvre some of the airport's largest aircraft. In 2007 baseline data will be collected on these vehicles to determine average mileage, maintenance regimes and typical emissions figures for each group of vehicles. Once this baseline is established an emissions reduction strategy will be developed for implementation in 2008.

The emissions reduction strategy will focus on NOx emissions from airside vehicles to assist Reigate and Banstead Borough Council in their efforts to ensure that air quality standards are met in designated areas of South Horley. It is intended that the emissions reduction strategy will target specific reductions in airside emissions. The mechanism to achieve this is in the process of being developed but it is important for BAA to quantify the reduction achieved at Gatwick.

Plans at a glance

Summary table from 2007 to 2015





Monitoring progress

The Surface Access Strategy is guided by and elaborates on a series of commitments, prepared in discussion with the local authorities and other stakeholders. It sets out the policy framework and broad strategies required to achieve our targets and commitments.*

We have established a monitoring process to demonstrate progress towards meeting those targets and identification and delivery of specific action plans and remedial measures. The table below illustrates the various data sources and indicators that are used in the monitoring process.

The Annual Monitoring Report (AMR) is the primary vehicle for reporting progress against all of BAA Gatwick's commitments, which includes those relating to surface access and detailing action plans for the coming year. The AMR is subject to independent verification by auditors jointly appointed by West Sussex County Council, Crawley Borough Council and BAA Gatwick.

Each year a number of commitments are selected for detailed scrutiny to establish whether the stated progress was an accurate record of what was achieved and whether the previous action plan was followed up.

An Executive Summary of the audit is published in the AMR. The AMR is supplemented by interim reports to the Transport Forum Steering Group and Gatwick's Consultative Committee (GATCOM).

We are currently in discussion with the local authorities about the monitoring and reporting requirements that cover the period 2009-2015.

Inputs	Process	Outputs
• CAA air passenger statistics • BAA market research data • Staff travel surveys • Bus, coach and train operator sales • Traincard/travelcard issues • Road traffic counters • Road traffic model • Car parking transactions • Car parking occupancy surveys • Project plans • Joint working initiatives	• GATCOM • Transport Forum Steering Group • AMR audit	• Annual Monitoring Report and independent verification statement • Corporate Responsibility Report • Quarterly progress reports to Steering Group and to GATCOM

** As this document went to press we were still in the process of agreeing the revised schedule of surface access commitments with the local authorities. When that process has been agreed, we will publish a supplementary note to the Surface Access Strategy, containing a list of the updated commitments, together with an explanation of how they cross-relate to the various strategies, targets and action plans set out in this document.*