

ECONOMY AND SURFACE ACCESS

# SUSTAINABLE DEVELOPMENT PLAN 2016



# OUR AIRPORT

## CONTENT



INTRODUCTION..... 03

OVERVIEW ..... 04

OUR ECONOMIC STRATEGY..... 05

    Economic Context..... 05

    Economic Impact..... 14

    Economic Aims..... 19

OUR SURFACE ACCESS PLAN..... 20

    Partnership ..... 21

    Surface Access Objectives ..... 21

    Travel to the Airport..... 22

    Transport Policies ..... 27

HOW TO CONTACT US..... 52



## INTRODUCTION

The Manchester Airport Sustainable Development Plan (SDP) is an important document for our airport. It sets out our vision for Manchester over the next decades and addresses some of the key challenges we face in operating a successful airport.



Our previous Master Plan was published in 2007. This set out the strategic direction for the airport up to 2030 by which time it was expected to be serving some 50 million passengers. Since 2007, the aviation industry and the wider economy have been through major changes. This has had an impact on the rate of aviation growth, both at a national level and at Manchester specifically.

This new Sustainable Development Plan replaces the 2007 Master Plan. It sets out our vision for the airport and the strategic context for the business as well as some of the key challenges that we face. The plan also provides guidance and information to airport users, occupiers, developers, statutory agencies and the local community.

We consulted widely on a draft SDP in 2015. We are grateful for the support and comments we received which have helped shape this final version.

The SDP sets out our strategic objectives for the growth and development of our airport. The objectives run through the plan and underpin our proposals. They are:

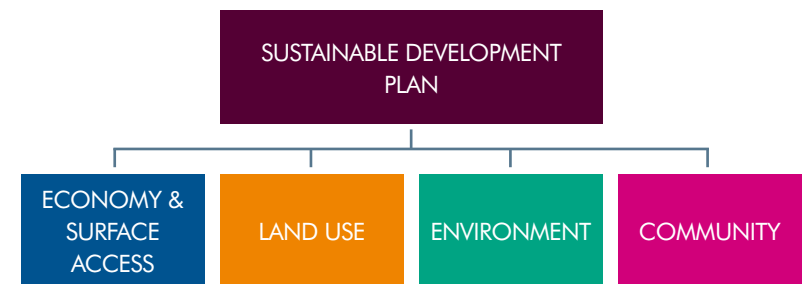
- Explain the long-term opportunities for the growth and development of our airport
- Set out our vision for the development of the airport site
- Provide the framework for capitalising on the benefits of the

## SUSTAINABLE DEVELOPMENT PLAN ECONOMY AND SURFACE ACCESS

airport's development and for managing and minimising local disturbance and environmental impact.

- Set out our plans to enable a constructive dialogue with our customers, neighbours and business partners
- Inform the plans and strategies of others across the north west region and beyond
- Provide evidence to help Government understand the implications of making best use of Manchester's capacity.

The SDP comprises four detailed plans that cover the economic context and the surface access proposals for developing our growth strategy, the land use implications and how we intend to develop our environmental and community programmes:



We will regularly review the SDP and its supporting documents so that they remain relevant and reflect the evolution and the development of the airport. This follows the guidance in the 2013 Aviation Policy Framework and will be undertaken every five years.

### OVERVIEW

**The Government's Aviation Policy Framework 2013 asks airports to prepare Master Plans to provide a strategic policy framework for their development.**



Government have provided some guidance as to form and content; but acknowledges that local circumstances will determine the approach that is taken. In 2015, the independent Airports Commission produced its final report for Government, and a decision on how and where to provide additional capacity to best deliver and retain UK aviation hub capacity, is expected later in 2016. However, there is consistent support for growth at regional airports, such as Manchester, because of the significant benefits that arise, provided it is within acceptable environmental limits. Manchester Airport is recognised as having a markedly different role to other regional airports, because of its route network, facilities, connectivity and scale. It brings benefits to the whole of Northern Britain and is a significant catalyst for the Northern economy; supporting and attracting inward investment, tourism and trade. In recognition of this, the Government in 2011 confirmed that the Greater Manchester Enterprise Zone be centred on Manchester Airport and that the Airport City concept be used as a springboard for wider growth and regeneration.

This Plan is the latest in a long series of documents which have guided the long-term development strategy for our airport. We published our first Development Strategy in 1982, covering the period up to 1990.

Our last Sustainable Development Plan was produced in 2007 in response to the 2003 Government Air Transport White Paper. This suggested that Manchester should demonstrate the ability to cater for an annual throughput of around 50 million passengers forecast for the year 2030.

Much has changed in the aviation industry since that time. So in 2015 we prepared an updated Sustainable Development Plan, and consulted widely with our stakeholders and neighbours. This final version of the Plan has been modified to take account of public consultation and now sets the framework for the next phase of the airport's operation and development.

We have reassessed the capability of our airport to deliver an annual passenger throughput of circa 45 million. We set out how we would handle that level of activity, and how we would deal with the impacts that arise – both positive and negative. Whilst informed by national forecasts of future airport throughput, this Plan is not driven by, or fixed to, those forecasts. History has shown that fixing plans to forecasts is inherently risky. Economic fluctuations can quickly render forecasts out of date and hence discredit the plans reliant upon hitting those forecasts. Whilst annual passenger forecasts are widely used to give an overall scale of airport activity and future growth, our focus is on maximising the capacity of our existing and future facilities and increasing efficiency in the use of all our assets. Our Plan shows how Manchester can develop in future years to play the fullest part in the UK's aviation market and, in particular, how our activities can bring the maximum benefit to our airlines, passengers and the regions that we serve.

### OUR ECONOMIC STRATEGY

Manchester Airport is an important catalyst for growth and productivity in the North of England. Our aim is to maximise our economic contribution and maintain a sustainable relationship with our supply chain and business partners. This Economic Plan sets out the steps we aim to take to achieve this as we grow the airport.



Today, we already make a significant contribution to the economic vitality of Greater Manchester (GM), the North West and our wider catchment area. As our airport grows so the scale of this contribution will too; both in terms of the direct value of the economic activity at and adjacent to airport, but also through the wider economic benefits associated with international connectivity. In this way, we will play a key role in the growth and development of sectors of the economy that rely on this connectivity and that are target growth sectors in many of the economic aspirations of the North of England and North Wales.

#### ECONOMIC CONTEXT ECONOMIC GEOGRAPHY

The airport supports a wide economic geography. We are a direct part of the Greater Manchester economy, but we also support adjacent economies such as Cheshire and Warrington and the northern parts of Wales. As a result of the unique international connectivity we offer, being one of the best connected airports in the UK with around 200 destinations served and the largest outside of London, the wider North of England and Welsh economy also benefits.

The Greater Manchester economy is formed of the 10 metropolitan districts of Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Tameside, Trafford and Wigan. It has a combined population of nearly 3 million and is the largest city based economy outside the South East of England with nearly 100,000 businesses and an economy worth £48.2bn<sup>1</sup>. This is approximately 4% of the national economy, and bigger than the GVA of the whole of Wales. Apart from

London, it is considered the UK city most likely to be able to increase its long term growth rate, to access international networks and enjoy strong connections to the rest of the world: in 2012/13 GM secured more foreign direct investment projects than other LEP areas outside of London and the Thames Valley, and generated nearly 1,500 new jobs as a result<sup>2</sup>. Our economic impact is also through the tourism market: there are over 1 million international visitors to Greater Manchester each year<sup>3</sup>, so the airport is a key gateway for visitors.

Cheshire and Warrington to the immediate south and west of the airport respectively, is recognised as one of the strongest performing economies in the country<sup>4</sup>, with workforce productivity levels rivalling those generated anywhere in England outside of the capital. The economy of Cheshire and Warrington is characterised by a highly economically active resident population, with a strong in-built enterprise culture and a high skill base. This economic strength provides economic opportunities that stretch beyond its boundaries and the area is a net importer of labour.

The economy of this area has a large cohort of world-leading firms, an annual GVA of over £20bn and over 430,000 work-based employees. It has distinct sectorial specialisms in advanced, high value engineering, energy and professional and business services as well as growth potential in food, agri-technical and biological engineering. Their focus is to be competitive in growing markets and in sectors where they already have a competitive advantage.

Further west, the Deeside and wider North Wales economies are also home to major international companies, specialising in advance manufacturing aerospace, automotive and pharmaceutical sectors. In 2012, the combined economies of the Deeside Enterprise Zone contributed some £15bn of GVA to the UK<sup>5</sup>.

<sup>1</sup> Office for National Statistics 2012

<sup>2</sup> Building Local Advantage: Review of LEP area economies in 2014 (2014), The LEP Network, page 36

<sup>3</sup> International Passenger Survey (2012)

<sup>4</sup> Building Local Advantage: Review of LEP area economies in 2014 (2014), The LEP Network, page 13

<sup>5</sup> Sector Reports – Mersey Dee Area – Report to The Mersey Dee Alliance (2012), Mickledore Ltd



### OUR ECONOMIC STRATEGY



Figure 1: Major Companies in the North of England

### OUR ECONOMIC STRATEGY



#### STRATEGIC RECOGNITION OF THE AIRPORT'S ROLE

As the economy continues to recover there is an increasing recognition that the country needs to rebalance the economy and avoid overheating the south-east economy at the expense of the rest of the country. We believe that our airport will play a crucial role in positioning the north west of England and the Greater Manchester City Region in particular, as a counter-point to the south-east economy; what has been termed 'Britain's second engine of growth'.

Key stakeholders across the region, including Councils and Local Enterprise Partnerships (LEP), recognise the airport's potential in facilitating economic growth in recently produced policy statements. Set out below are a summary of how these organisations view the airport's connection with the local and regional economies.

#### LOCAL ENTERPRISE PARTNERSHIPS

The airport sits primarily within the Greater Manchester Local Enterprise Partnership (GMLEP) but has a very strong geographic relationship with the Cheshire and Warrington LEP (CWLEP). Such is the scale of our impact and potential however, we are acknowledged by other LEP's as having a far wider reach and influence.

The GMLEP is at the heart of Greater Manchester's partnerships between local government, businesses, further and higher education, and across the public, private and voluntary and community sectors. Both the GMLEP and the Greater Manchester Combined Authority (GMCA) own the Greater Manchester Strategy (GMS) (see below); a document that outlines nine key policy areas for economic growth for the city region. The policy areas that are specific to the airport's influence include: employment and skills; inward investment and international trade; transport; and marketing and tourism.

In March 2014, the GMLEP and the GMCA published 'A Plan for Growth and Reform in Greater Manchester' to provide governance and delivery of the GMS's priorities. A core funding priority for the GMLEP is to ensure that available funding is used effectively to develop transport networks that link businesses with supply chains, customers and labour markets. The GMLEP's investment is intended to add value to the 'continued development of Manchester Airport as the nation's foremost international air facility outside of London'<sup>6</sup>. Moreover, the GMLEP intends to support and ensure that the airport (and Piccadilly) is HS2 ready and that the potential of the Airport City Enterprise Zone is unlocked.

The CWLEP in its growth plan recognises the value of Manchester Airport in its ability to sustain a 'well-connected economy'<sup>7</sup> for Cheshire and Warrington, adjacent an international scale city region, but things can still improve. The combination of HS2 and the airport represents an opportunity to the CWLEP that means it is working in partnership with the GMLEP to harness. Indeed, the CWLEP acknowledges that the airport is of 'prime importance' to its ability to access global markets and secure inward investment through passenger and freight movements<sup>8</sup>. In turn, access to and from the airport by both road and direct rail is acknowledged as a key action area for investment and improvement<sup>9</sup>.

<sup>6</sup> A Plan for Growth and Reform in Greater Manchester (2014), GMLEP, page 38

<sup>7</sup> Cheshire and Warrington Matters (2014), Cheshire and Warrington Enterprise Partnership, page 10

<sup>8</sup> Cheshire and Warrington Matters (2014), Cheshire and Warrington Enterprise Partnership, page 84

<sup>9</sup> Cheshire and Warrington Matters (2014), Cheshire and Warrington Enterprise Partnership, pages 91 & 97

### OUR ECONOMIC STRATEGY



The airport's catchment is however much greater than Greater Manchester and Cheshire (which together contribute only 42% of our passengers). Beyond GM and Cheshire and Warrington, we influence a wide geographic area of LEPs; their growth plans also seek to capture the economic benefits that we deliver. Specifically, Liverpool City Region LEP plan to develop better routes to the emerging markets of the Brazil, Russia, India and China<sup>10</sup>, in partnership with us. The Derby, Derbyshire, Nottingham and Nottinghamshire LEP (D2N2) is focussing their growth ambitions on being centrally located between several airports, including Manchester and also acknowledge that the western areas of the LEP will benefit directly from close proximity and improved surface access to Manchester<sup>11</sup>.

Similar to CWLEP, the Stoke and Staffordshire LEP recognise the international connectivity benefits from proximity to Manchester Airport, and identify a key priority as improving rail links<sup>12</sup>. The Cumbria LEP seeks rail access improvements along the West Coast Main Line (WCML) and to maintain the Barrow to Manchester Airport direct service<sup>13</sup>.

The Deeside Enterprise Zone lists its connectivity as a key element of its attractiveness to business and in particular the accessibility to international destinations from Manchester Airport<sup>14</sup>.

We will commit to working with the range of LEPs that value the benefits of the airport to ensure that the wider economic strength of the North can be capitalised upon.

#### GREATER MANCHESTER COMBINED AUTHORITY

The Greater Manchester Combined Authority (GMCA) is a statutory body which co-ordinates Greater Manchester's economic development, regeneration and transport functions. It has an aim to boost economic performance and help deliver a brighter future for

Greater Manchester and the North West. By 2020, economic growth will be based around a more connected, talented and greener city region and the GMCA has developed the GMS in order to deliver this ambition. GM generates some £48bn in GVA, but despite this a key challenge is to overcome the £5bn deficit in public spending to tax income and for GM to become a net contributor to the national economy. To achieve this, the GMS sets out a plan to reduce dependency on public services and get its population into work.

One of the factors to achieve increased employment opportunities is for GM to be operating in global markets, in order to create growth for investment and business. As a result, there are two core areas that are identified in the GMS that the airport can affect: creating the conditions for growth and supporting businesses<sup>15</sup>. Specifically, connectivity at a local, national and international level is at the heart of the economic strategy and in turn, the airport is a major driver of future growth through the development of trade routes to GM's target markets. Direct connectivity is supplemented by the leverage obtained from marketing its international assets, such as a major and well connected international airport, and the access we provide for inbound tourism.

<sup>10</sup> Liverpool City Region Growth Plan & Strategic Economic Plan [draft v6] (2014)  
Liverpool City Region LEP, page 18

<sup>11</sup> The D2N2 Strategic Economic Plan (2014), D2N2 Local Enterprise Partnership, pages 35 & 36

<sup>12</sup> Strategic Economic Plan (2014), Stoke on Trent and Staffordshire Enterprise Partnership, pages 12 & 25

<sup>13</sup> The Four Pronged Attack: Cumbria Strategic Economic Plan 2014-2024 (2014),  
Cumbria Local Enterprise Partnership, page 26

<sup>14</sup> Deeside Enterprise Zone (2013) Welsh Assembly

<sup>15</sup> Stronger Together: GM Strategy 2013 (2013), GMCA, pages 34-47



### OUR ECONOMIC STRATEGY



China is a key target market for the North West's business. The region and the Airport City Enterprise Zone have already secured Chinese investment. We lead the China Forum – a multi-partner initiative – which aims to strengthen trade links and attract and stimulate inward investment. Direct air links for passengers and cargo to China are vital to sustain this and to increase inbound tourism. We will continue to drive forward developing new routes to strengthen GM's global connectivity.

The GMS is supported by a detailed transport strategy, the 'Transport Strategy and Investment Plan' (published as part of the GM Growth and Reform Plan) to enable the levels of connectivity considered necessary to facilitate the economic strategy through targeted expenditure from the GM Transport Fund (GMTF). As the GMS highlights the airport as being pivotal to regional growth and prosperity and a key element in extending Greater Manchester's international connectivity, so too does the transport strategy (see figure 2).

Within the transport strategy, priorities<sup>16</sup> for enhancing the accessibility of the airport centre on: increasing the speed and efficiency of movement of passengers and freight on the networks serving the airport; developing the airport as a world class transport hub for integrated transport; influencing travel behaviour to significantly increase the number of passengers and staff travelling by sustainable modes to and from the airport; supporting infrastructure delivery that will support surface access to the airport and the Enterprise Zone; and, to be a beacon of best practice through the delivery of innovative transport solutions.

The transport strategy also sets out how GM is making itself ready for HS2 and Northern Powerhouse Rail (NPR) and how it will enhance the economic performance of the area, recognising that its potential

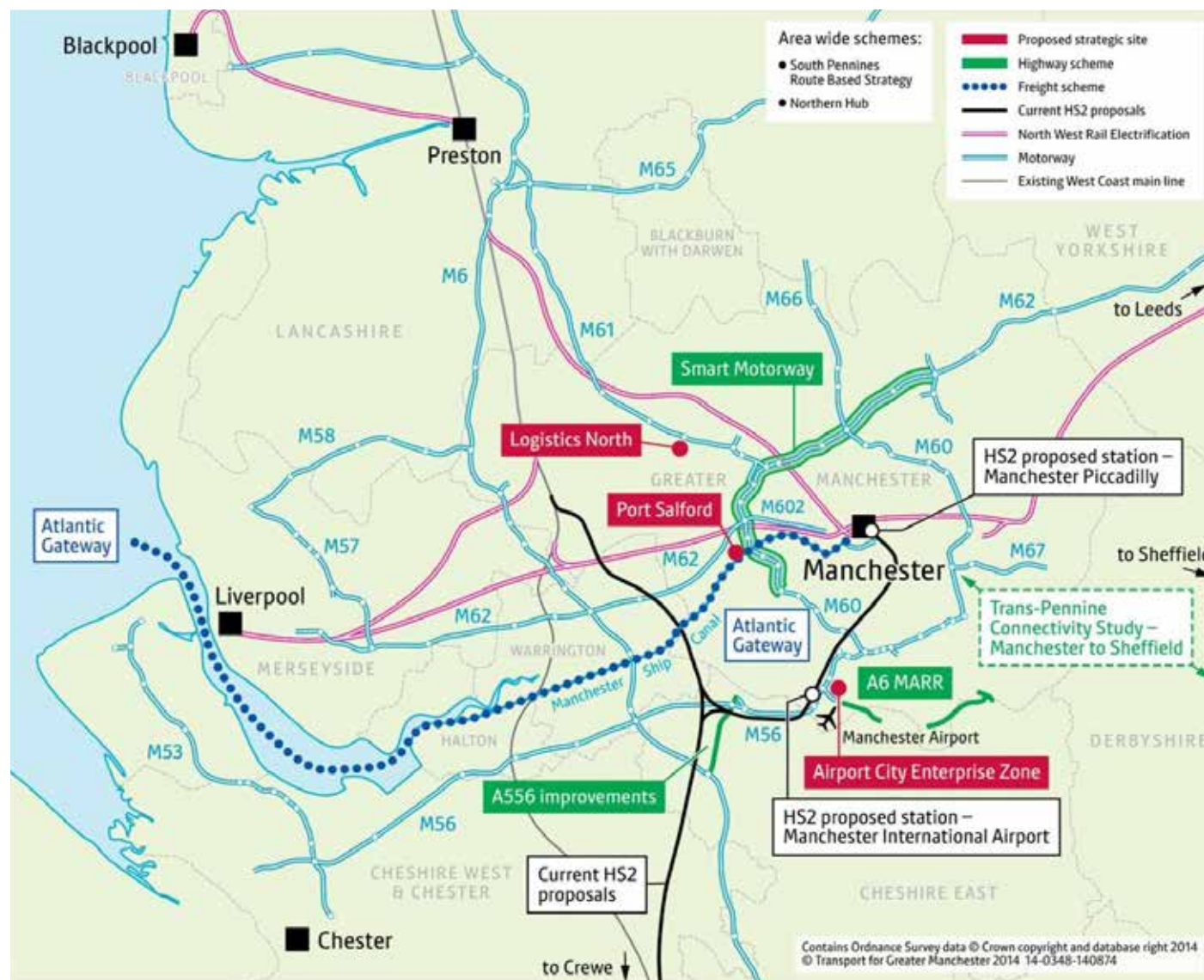
can only be realised if the local conditions are right. This will require strategic decision making and long-term planning to facilitate local growth potential around the HS2 and NPR stations at Manchester Piccadilly and Manchester Airport and its Airport City Enterprise Zone. In each case it is acknowledged that this is about more than local growth. It is also about maximising the productivity gains from HS2 and NPR which means national as well as local gains.

We are part of a GM wide group of public and private sector bodies (including the GMLEP) who are supporting the case for major investment in the national rail network because of the economic and passenger benefits it will bring, the reduction in journey times and the additional capacity it will provide. We will continue to work with partners to secure this investment.

<sup>16</sup> GM Growth and Reform Plan: Transport Strategy and Investment Plan (2014), GMCA and GMLEP, page XX

### OUR ECONOMIC STRATEGY

Figure 2: Greater Manchester at the heart of the North (source: GM Growth and Reform Plan: Transport Strategy and Investment Plan 2014, GMCA)



### OUR ECONOMIC STRATEGY



#### MANCHESTER CORE STRATEGY 2012-27 AND THE AIRPORT CITY ENTERPRISE ZONE

The airport has a dominant role within the Manchester economy and this is recognised throughout the Council's recent Core Strategy. It identifies that Manchester will be a city driven both by the airport and the regional centre, and that the city's employment opportunities will be improved by a growing airport. Such is the importance of the airport, that it forms part of the Strategy's spatial principles<sup>17</sup> and is a strategic site.

In addition to its city-wide importance, the airport functions as a unique employment centre and opportunity for many of Wythenshawe's residents, given its location to the south of the town's residential area. Such is the scale of the employment on site, the workforce is also drawn from a wider area encompassing Trafford, Stockport and beyond, but nevertheless the impact on South Manchester is important in assisting in the regeneration of Wythenshawe.

Economic growth and transport connectivity are heavily linked in the Core Strategy; both for the value of international links for business growth, but also for the accessibility of the airport as a place to work for local residents. Each of these themes carries significant importance in the Core Strategy, which illustrates that the scale of impact and potential of the airport is multi layered.

In addition to the direct employment opportunities that the airport creates, the Core Strategy acknowledges that we are a catalyst for further employment too. A prominent example of this is the Airport City Enterprise Zone; an opportunity that the Council recognise as a Greater Manchester, Manchester City and Wythenshawe opportunity. Part of the Enterprise Zone is outside the airport's operational area, but sits on the boundary so as to be functionally linked and draw from the airport's transport connectivity. Like the airport, the Enterprise Zone is a strategic allocation in the Core Strategy.

#### ONE NORTH, THE NORTHERN POWERHOUSE & TRANSPORT FOR THE NORTH

One North is the strategic proposition for transport in the North, published in 2014. Led by the major cities (Manchester, Liverpool, Leeds, Sheffield and Newcastle) of the North, it was a direct response to the challenge set out by Sir David Higgins in his report on HS2 to come together to develop a coherent strategic transport plan integrating HS2 with the existing rail network, transforming connectivity across the North – referred to now as NPR.

Radically improving connectivity between northern cities and its international gateways was identified by One North<sup>18</sup> as the key means of enabling those cities to perform at a level greater than the sum of their parts. The 15 million population of the North is larger than London and as big as many European countries, but the economy is not doing as well. The ambition is for a "Northern Powerhouse": the North acting as a dynamic counterweight and complement the London and South-east economy, a destination of choice for investors, helping rebalance and grow the national economy for decades ahead.

<sup>17</sup> Manchester Core Strategy (2012), Manchester City Council, page 31

<sup>18</sup> One North: A Proposition for an Interconnected North (2014) page 6

## OUR ECONOMIC STRATEGY



Transport is central to this ambition. Transport networks internally, with surrounding areas and beyond are fundamental to the economic success of the North. However, journey times across the North are much slower, service frequencies lower and the interconnectivity of our transport networks much weaker than our competitor European regions. Consequently the One North Strategy promoted<sup>19</sup>:

- The optimisation of the strategic highway network;
- A high quality inter-city rail network including a new trans-Pennine route;
- City region rail networks that provide the additional capacity needed to sustain city centre growth;
- Building HS2 early and starting from the North; and,
- A digital infrastructure that offers full inter-modal connectivity.

In referring to Manchester Airport there is acknowledgement of the importance that has been placed on surface access arrangements in the airport's master plan and the linkages between this and the spread of the airport's economic benefits across the North West<sup>20</sup>. However, One North aims to spread this benefit across the wider North so as to drive a greater number of direct flights from the airport to meet the increasing needs of Northern businesses. Recognising that whilst the majority of people arrive at the airport by car, a constrained highway network will limit the scope of the airport to grow to meet this business need and so there is a need for enhanced rail connectivity (especially in an east-west direction), light rail connectivity and direct cross city services to the North's principal international gateway.

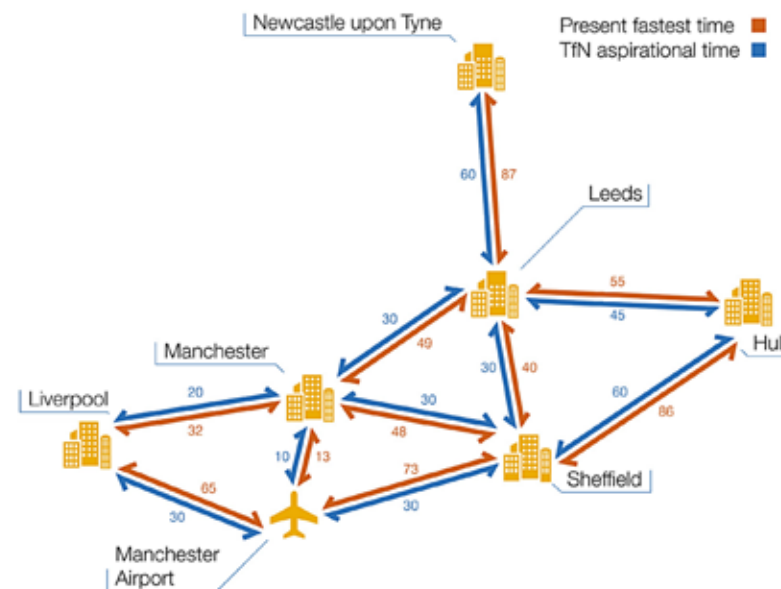
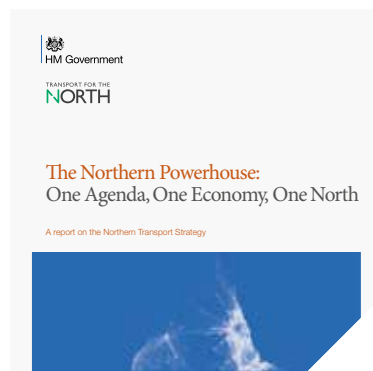


Figure 3: Current and Aspirational Journey Times, Source: The Northern Powerhouse: One Agenda, One Economy, One North (2015), National Rail timetable correct at time of publication

<sup>19</sup> One North: A Proposition for an Interconnected North (2014) page 6

<sup>20</sup> One North: A Proposition for an Interconnected North (2014) page 24

### OUR ECONOMIC STRATEGY



Following the One North publication, the HM Treasury and Transport for the North published 'The Northern Powerhouse' in March 2015; which 'identifies a long term transport strategy and how we will develop the associated investment programme, following the ambitions set out by One North'. The commitment is to 'pursue better connections to Manchester Airport through TransNorth (HS3), whilst city regions consider connectivity to the North's other major airports'<sup>21</sup>. The necessary investments will be achieved through rail improvements in Network Rail's Control Period 6 (CP6) which is 2019-24, progress on HS2 and also through road improvements via the Road Investment Strategy.

More recently, Transport for the North is evolving towards being the first statutory sub-national transport body by early 2017, which will be responsible for the strategic direction of the transport network improvements that underpin the vision of the Northern Powerhouse. In its Spring 2016<sup>22</sup> report, it sets out how progress has been made towards understanding the options available to improve the rail network and maximise the impact of HS2, on-going strategic east-west road improvement studies, including a Trans-Pennine Tunnel, and the creation of an implementation plan for new technologies – or 'Smart North' (improving the passenger experience, operational efficiencies and developing a consistent familiar travel experience).

Delivery of these ambitious aims will take time, but the Government has already committed funding in the Budget to progress the work of TfN. Furthermore, the National Infrastructure Commission<sup>23</sup> has stated that connectivity should be improved in stages, not waiting for transformational change: specifically, kick starting NPR and improving the M62. We are supportive of the One North principles and the Northern Powerhouse/TfN propositions and will work with partners to deliver infrastructure improvements as early as possible to maximise our economic impact and potential.

<sup>21</sup> The Northern Powerhouse: One Agenda, One Economy, One North (2015),

HM Treasury and Transport for the North, Executive Summary

<sup>22</sup> The Northern Transport Strategy: Spring 2016 Report (2016), Transport for the North

<sup>23</sup> High Speed North (2016), National Infrastructure Commission



### OUR ECONOMIC STRATEGY



#### ECONOMIC IMPACT

##### MORE THAN JUST AN AIRPORT

Manchester Airport is a unique asset for Greater Manchester and for the north of England because of the connectivity we provide, unrivalled outside London. We already provide significant benefits and through working in partnership, we believe we can deliver more and strengthen our own economic contribution.

We provide major national and international air transport connectivity for the region and the north of England from our airport, but Manchester Airport is also a destination in its own right. The airport is a major employer within the North West, both on site and in terms of the associated jobs that it creates across the region. We are a key driver of wider economic growth, particularly in supporting inward investment and international trade. The continued growth of the airport is a major opportunity for the region, especially from the perspective of increasing local employment opportunities and ensuring continued prosperity in the various regions and communities we serves.

In 2011, the Government confirmed Manchester Airport as an Enterprise Zone. The Enterprise Zone includes the development of Airport City and the Global Logistic Hub; environments for business to thrive and stimulate growth and ultimately acting as a springboard for the wider regeneration of South Manchester. The 116-hectare site

is already attracting global businesses (such as DHL and amazon), creating new employment opportunities and stimulating economic growth for the whole Greater Manchester economy. The delivery of Airport City will act as a catalyst for the regional economy, and will also provide the impetus for a second hub of economic activity in this part of the City Region through inward investment, creating a number of positive benefits to the deprived Wythenshawe area.

In March 2015 the Government announced an extension to the GM Enterprise Zone. This reflects the strong market demand, especially in the logistics and cargo sectors. The Global Logistics Hub site may no longer be adequate to meet the scale of opportunity and demand; we will work with partners to investigate how this can be achieved whilst recognising the need to manage the social and environmental issues. This would increase the economic impact of the airport's logistics activity.

#### SCALE OF BENEFIT

The scale of our economic contribution can be demonstrated with estimates of our economic impacts, the potential for direct interventions in the local economy, and through improvements to connectivity within the local and regional economy. The following sections describe these benefits and our approach to realising this potential.

### OUR ECONOMIC STRATEGY



The airport brings a range of economic benefits. These can be summarised into the following categories:

- **Direct Benefits:** providing direct employment on site, for the benefit of the local and wider population;
- **Indirect/Supply Chain Benefits:** local, regional and national companies providing employment as a result of supplying goods to the airport and its partners;
- **Induced Benefits:** the spend within the local area and region as a result of direct and indirect employment and the acquisition of services and goods; and
- **Spin off Benefits:** including tourism, foreign investment and support for local businesses as a result of the reputational advantages and connectivity that an international airport brings.

We currently employ around 20,600 people on site and the direct employment associated with the airport is nearly 27,000. As an employment centre, the role of the airport in the Greater Manchester economy is valuable; direct and indirect employment created via the airport is 6.5%<sup>24</sup> of the employment base in Greater Manchester and three-quarters of our staff live in the city region<sup>25</sup>. We generate £918m in GVA to the UK economy of which a substantial proportion is derived directly from activities associated with aviation and air transport. Other important sectors include construction, retail and hospitality, services and 'other' transport activities.

Aviation growth at Manchester is wholly in line with the Government's wider objectives to rebalance the national economy. The airport is one of the principal driving economic forces in the North of Britain. The figure below compares different measures of the airport's economic impact in 2013 with those associated with passenger throughputs of 35mppa and 45mppa. The figure shows that the airport already delivers significant benefits to Greater Manchester and that the scale of these benefits will increase as the airport grows.

Passenger numbers (mppa)	20.4	35	45
Contribution to UK Economy (£million)	918	1,573	2,022
Direct employment	26,938	46,136	59,318
On-site employment	20,600	32,540	41,838
Annual wage impact of on-site employees (£m)	271	465	597
Annual contribution of employment generated by airport to the regional economy (£bn)	1	1.7	2
International visitors who used Manchester Airport	1,222,517	2,093,750	2,691,964
Estimated total visitors' spend (£m)	469	804	1034

Figure 4: Manchester Airport's Economic Impact

Note: The 2030 statistics have been updated using MAG airport traffic forecasts.  
Source: IPPR North and the Northern Economic Futures Commission (2012), 'Northern Prosperity is National Prosperity', November; New Economy (2011), 'Manchester Airport: Strategic Opportunities', A report for the Association of Greater Manchester Authorities; York Aviation Study in New Economy (2011), 'Manchester Airport: Strategic Opportunities', A report for the Association of Greater Manchester Authorities; Tribal (2008).

<sup>24</sup> Butcher (2012) in IPPR North and the Northern Economic Futures Commission (2012), 'Northern Prosperity is National Prosperity', November

<sup>25</sup> MAG Employment Survey (2010)

### OUR ECONOMIC STRATEGY



#### CARGO

The transport by air of goods is of national significance and economic importance. HM Revenue and Customs reported air freight represented 43.3% of UK exports to countries outside the EU by value in 2012. All regions of the UK need easy access to global air freight connectivity if they are to contribute to the Government's objectives of re-balancing the economy and promoting export-led growth. The principal routes for air freight in and out of the UK are the trans-Atlantic routes to the United States and also routes to the major Asian economies. The Asian air freight market is growing at around 19% annually.

Maintaining a network of international connections is vital to UK business and to the UK economy. Surveys undertaken by Oxford Economics<sup>26</sup> have shown that 80% of the UK businesses surveyed stated that their business would be badly affected if international next-day deliveries were no longer available. UK businesses are more dependent on express services than those based in continental Europe. In part this is due to the UK's success in attracting foreign inward investment and may also reflect the fact that the UK is an island. These businesses operate with international supply chains that also include just-in-time inventory systems. These processes rely heavily on express freight services. In their research Oxford Economics concluded that, should next-day delivery services not be available in the UK, then UK GDP would be reduced by £3bn annually. This is due to the disruption to the logistics network and the adverse effects on business investment

Although Manchester is not one of the major UK freight airports by total tonnes carried, our role in rebalancing the UK economy and strengthening the city region economy remains important. We currently handle around 100,000 tonnes of import and export freight and mail annually. Our largest cargo markets are the Far East, North America and the Middle East and imports represent between 55-60% of cargo volumes; the Far East and Middle East are predominantly sources of import cargo whilst North America is a key destination for exports. Latin America is also emerging as a major source of air cargo volumes, both for imports and exports.

Development of our passenger route network which will grow our belly hold cargo capacity, and our ability to accommodate growth in dedicated freighter traffic, means that we will continue to support the regional economies that we serve.

#### EMPLOYMENT AND SKILLS

We are committed to playing our part in the growth of the GM economy through the provision of aviation infrastructure. However as illustrated earlier, our impact extends further given the current scale of on-site employment and the opportunity for job numbers to double.

Unemployment has increased in GM since 2008 and the GMS recognises that getting people into work, and ready for work, is a key challenge. Like all GM employers, we require a labour supply with the right skill base, and our on-site service partners require the same.

Although we know that the airport is often considered as an

### OUR ECONOMIC STRATEGY



aspirational place to work through our community engagement, we cannot just rely on others to produce a labour pool for us. Instead we will play our part by continuing and expanding our work in addressing unemployment through the 'Airport Academy' and support employability programmes that focus on offering opportunity for young people and those who are workless.

In partnership with other GM employment and education agencies, particularly the Manchester Enterprise Academy in Wythenshawe, we will look for opportunities to access funding to develop bespoke opportunities to train and recruit young people for our site.

We have had success, as over 300 people entered work at the airport in 2014 through the Airport Academy, but more can be done.

#### IMPORTANCE OF CONNECTIVITY TO THE AIRPORT AND OUR CONNECTIVITY TO THE WIDER REGION

Research by the Civil Aviation Authority (CAA) has found that 55%<sup>27</sup> of passengers use the cost and convenience of getting to an airport as the key reason for choosing to use one airport over another. This factor ranked only second to the availability of air services (chosen by 56% of passengers). This finding highlights the importance of surface access in the consumer journey and emphasises its importance in both attracting passengers to and retaining staff at the airport.

A clear linkage between the quality of surface access connections to and the level of economic development sustained by an airport is a constant theme that emerges through both research and evidence. When transport systems are efficient, they provide economic and social opportunities and benefits that result in positive multiplier effects such as better accessibility to markets, employment and additional investments. When transport systems are inefficient in terms of their capacity or reliability, they can have an economic cost such as reduced or missed opportunities and lower quality of life.

In a similar way to the economic impact of the airport, transport connectivity has economic impacts that are direct, indirect and related (induced or catalytic):

- **DIRECT IMPACTS** the outcome of accessibility changes where transport enables employment, added value, larger markets and saves time and costs.
- **INDIRECT IMPACTS** the outcome of the economic multiplier effects where the price of commodities, goods or services drop and/or their variety increases. Indirect value-added and jobs are the result of local purchases by companies directly dependent upon transport activity.
- **RELATED IMPACTS** the outcome of economic activities of firms partly relying on efficient transport services for both passengers and freight. International headquarters of major firms as well as manufacturers and retail outlets and distribution centres rely on efficient transport operations.

<sup>27</sup> Better Information about UK Aviation: Consultation on the CAA's New Publication Duties (May, 2013), Civil Aviation Authority

### OUR ECONOMIC STRATEGY



Economies that have good connectivity and mobility – both domestically and increasingly internationally – are well placed to take advantage of economic opportunities. Greater mobility is a catalyst for development, while reduced mobility impedes development and constrains growth. It is widely acknowledged that the growth of Manchester Airport will have a wide range of the spin-off benefits outlined above.

Enhancements to our connectivity will be a key factor in driving economic regeneration in local areas around the airport. Employment opportunities at or directly attributable to the airport's activity will be important to the regeneration of local communities, in particular Wythenshawe but also in parts of the wider catchment area. In conjunction with our Surface Access objectives, we will aim to improve access to the airport so that jobs can be accessed by those residents. This will have a combined benefit of a larger labour pool for job vacancies arising at the airport, but importantly provide strong impetus for economic and social regeneration.

Our experience has shown that working closely with partners is crucial. The importance of partnership working has been reinforced by the creation of Local Enterprise Partnerships, and there is now an overriding emphasis from Central Government that local authorities and businesses should work in partnership to create delivery and funding mechanisms to enable infrastructure projects to be delivered.

We will draw on our experience at our other airports to drive and assist these processes. We have worked alongside partners to deliver a wide range of targeted infrastructure improvements, creating a hub of integrated transport networks that are under-pinned by affordability, reliability, safety and quality. Central to our approach is the multi-modal interchange that brings together rail, bus, coach and Metrolink services at the heart of the airport, catering for passengers, staff and visitors.



### OUR ECONOMIC STRATEGY



#### ECONOMIC AIMS

- We commit to work with partners to improve our facilities and connectivity so as to maximise our contribution to the growth of the Greater Manchester and Northern economies;
- We commit to working in partnership with local authorities, transport providers and LEPs to drive economic growth and job creation across the regions that we serve;
- We will continue to work in partnership with partners and the business community to attract trade, visitors and inward investment to the North. As part of this, we will focus on continuing to grow our range of long haul destinations as well as enhancing our levels of short haul connectivity;
- As part of the commitment in our Community Plan, we will continue to support the Manchester Airport Academy and the Manchester Enterprise Academy to provide training and jobs for local people, with particular emphasis on providing opportunities for the disadvantaged area of Wythenshawe; and
- Our Surface Access Plan will continue to target connections to key areas for our current and future workforce.

## OUR SURFACE ACCESS PLAN

Quite simply, surface access is key to everything that we do. At the heart of our growth strategy is the need to provide a transport network that is efficient, convenient, reliable and safe.



We have a long-standing commitment to sustainable travel and managing the growth in road traffic. This is our fourth Ground Transport Plan and highlights how our transport network has improved and the steps we will take to support our ambitious plans for growth.

In line with Government advice<sup>28</sup>, we have set challenging targets to increase the proportion of passengers and staff using public transport.

### OUR SURFACE ACCESS PLAN:

- Reports on progress since our last Ground Transport Plan in 2007;
- Sets out a clear framework for a surface access network that supports passenger and staff growth;
- Contributes significantly to our climate change strategy;
- Sets challenging targets and aspirations for surface access; and
- Identifies future surface access needs.

### OUR VISION AND APPROACH TO SURFACE ACCESS

“Manchester Airport will be one of the best connected and accessible airports, making travel easy for our customers and staff

As explained in our Economy Plan, the airport is pivotal to regional growth and prosperity and is a key element in strengthening the North's connectivity. The airport is also a major hub in the regional transport network. Passengers and staff have many different needs. Our vision is, quite simply, to make journeys to and from the airport easy, with priority given to sustainable modes of travel as set out below.

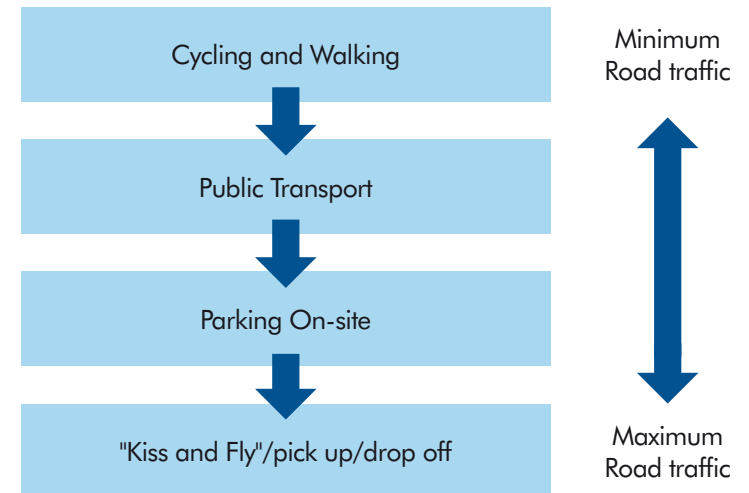


Figure 5: Hierarchy of preferred means of access

### OUR SURFACE ACCESS PLAN



#### PARTNERSHIP

We are committed to working in partnership. Delivering our vision is often outside our direct control and so success will require concerted action by all our partners. We are dependent on them to provide the infrastructure and services that our passengers and staff need. Key partners include:

- Department for Transport;
- Highways England;
- Network Rail;
- Transport for Greater Manchester;
- Transport for the North and local authorities;
- Public transport operators; and
- Business and service partners across the airport site.

As the pan Northern approach to economic growth and transport starts to take shape, we will take an active role with One North and a wider group of partners to ensure that improved connectivity plays its full part in delivering growth, investment and prosperity for the areas we serve.

More locally, we will continue to work in close partnership with Transport for Greater Manchester (TfGM) in supporting their vision to deliver a globally connected city region and an integrated and sustainable local transport system that acts as an engine for economic growth and is greener, safer and improves the quality of life for local communities.

#### POLICY

- We are committed to improving connectivity and, through our partnership working, support the delivery of the North's economic and transport priorities.

#### SURFACE ACCESS OBJECTIVES

Access to the airport continues to be dominated by the car. We are committed to reducing that dependence and securing a major increase in public transport use. This will reduce emissions and pollution, avoid congestion and improve choice. This Plan contains a comprehensive programme of activity to deliver the objectives set out below.

#### OBJECTIVES FOR MAKING TRAVEL EASY ARE:

- **Speed and Efficiency of Movement:** To support the wider economy and better serve our catchment area by providing a transport network that improves journey time reliability and allows for the fast and efficient movement of people and freight;
- **World Class Transport Hub:** deliver an integrated transport network with high quality, safe and affordable facilities for our customers and staff;
- **Sustainability:** To influence travel behaviour in order to significantly increase the number of passengers and staff using sustainable transport modes;
- **Enhanced Infrastructure Delivery:** support infrastructure projects that will improve surface access to the airport;
- **Supporting Employment:** Ensure transport encourages access to employment at the airport and Enterprise Zone; and
- **Innovation:** To be a beacon of best practice through the delivery of innovative transport solutions.

## OUR SURFACE ACCESS PLAN



### TRAVEL TO THE AIRPORT

This section describes the current travel patterns of our passengers and staff.

### PASSENGERS

The distribution of passengers is summarised in Figure 6 below. In 2014, around 75% of passengers accessed the airport by car, with just over 25% using more sustainable modes of transport<sup>29</sup>.

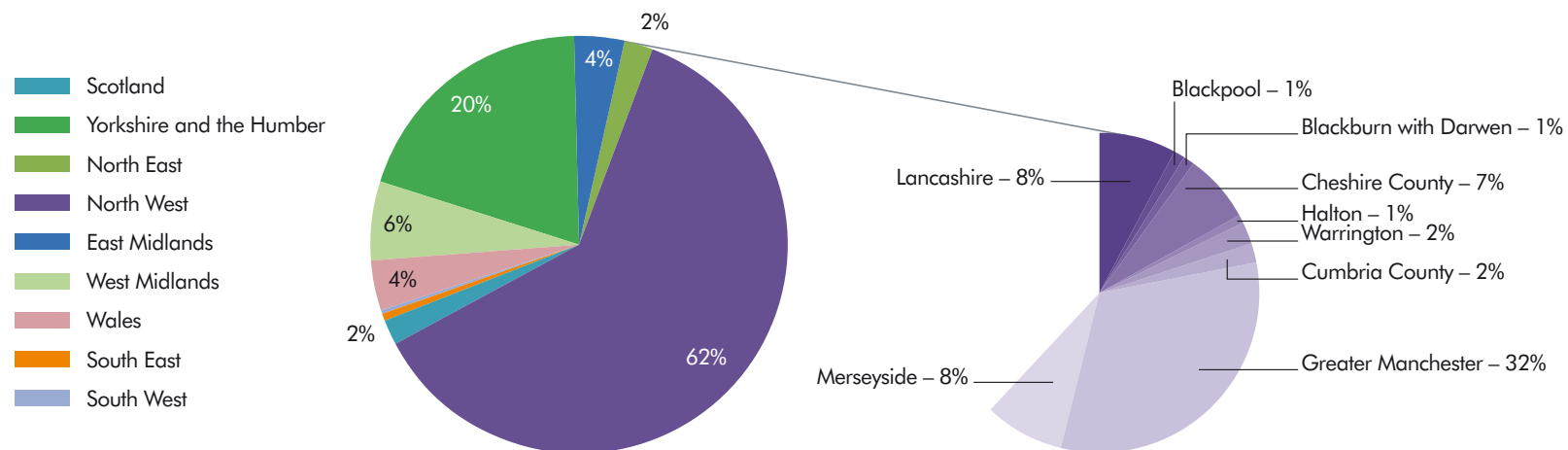


Figure 6: Origin of UK Based passengers at Manchester Airport, Source: CAA Passenger Survey Report 2012

## OUR SURFACE ACCESS PLAN



### STAFF TRAVEL

At present, over 20,000 people are employed directly on-site in over 300 different companies. The figure below shows staff travel use based on the latest survey.

Mode of Transport	Percentage of Staff	
Car Driver	71%	78.5%
Car Passenger	5.5%	
Taxi	1%	
Motorcycle	1%	
Bus/Coach	12.5%	21.5%
Train	4%	
Metrolink	See footnote*	
Cycling	2%	
Walking	2%	
Other	1%	

\* Initial estimates are c.5% of employees have switched from other modes to Metrolink

Figure 7: Mode Share: Staff Travel to the Airport

Figure 8 below shows that approximately three quarters of airport staff live in Greater Manchester with around 15% living in parts of Cheshire (Cheshire East, Cheshire West and Chester and Warrington).

Area	% of Staff	Area	% of Staff
Manchester	31%	Bury	2%
Stockport	15%	Oldham	2%
Trafford	10%	Rochdale	2%
Cheshire East	8%	Halton	1%
Tameside	5%	High Peak	1%
Bolton	3%	Liverpool	1%
Cheshire West and Chester	3%	St Helens	1%
Salford	3%	Wirral	1%
Warrington	3%	Other	5%
Wigan	3%		

Figure 8: Local Staff Travel to the Airport – Distribution



### OUR SURFACE ACCESS PLAN



#### TARGETS

A key part of our Plan is to set targets for surface access. In our 2007 Ground Transport Plan, we said that achieving our targets for public transport would be critically dependent on a sustained programme of investment in increased rail capacity, the full extension of Metrolink and improved integration between all modes of transport. Much of this has now been achieved, and so in this Plan we are setting new, challenging targets for the future. This will require continued strong partnership working across the region.

In order to ensure that public transport use increases along with the airport's growth, we have set the following long term mode share targets for passenger and staff travel set out in Figure 9 and Figure 11.



- Achieve 50% passenger mode share to public transport<sup>30</sup> by 45mppa.
- Grow rail mode share from 14% to 25% by 45mppa.
- Reduce 'Kiss and Fly' to 30% or below by 45mppa
- Reduce car travel for staff to no more than 60% by 45mppa.

Mode of Transport	Passengers		
	Current 22mppa <sup>31</sup>	30mppa	45mppa
Kiss & fly/Taxi	52%	40%	30%
Park on Site	21%	18%	15%
Rail	14%	18%	25%
Park and Ride	8%	14%	17%
Coach and Bus	3%	4%	5%
Car Hire	2%	3%	3%
Metrolink	0%	3%	5%

Figure 9: Passenger Mode Share Targets

<sup>30</sup> Public transport includes off-site Park and Ride

<sup>31</sup> Figures rounded

## OUR SURFACE ACCESS PLAN

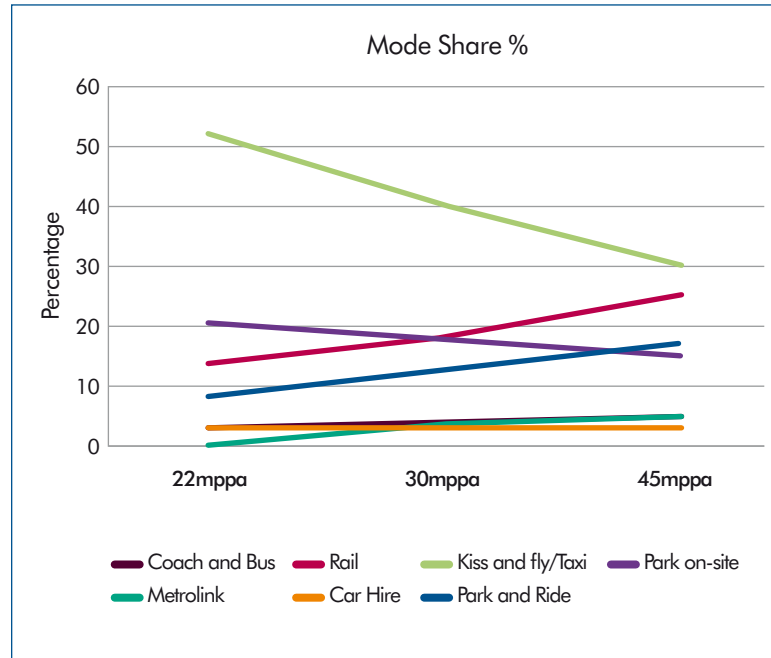


Figure 10: Passenger Mode Share Targets – Trends

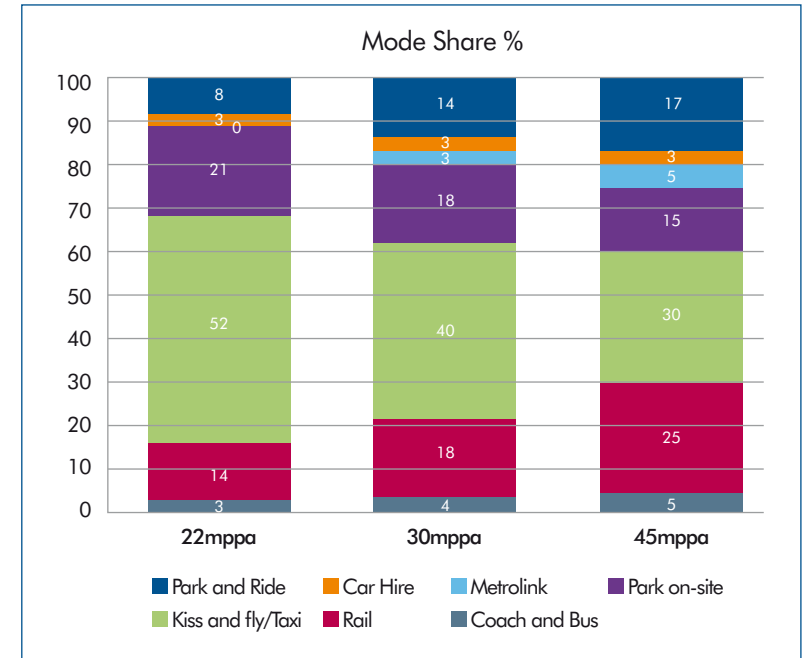


Figure 11: Passenger Mode Share Targets – Proportions

At present, around 75% of our passengers use a car, either as a driver or a passenger<sup>32</sup>. Given the forecast increase in passenger numbers, and congestion on the wider road network, we need to reduce this proportion. Overall, our aim is to reduce the percentage of passengers using the car to around 50% by 45mppa with the remaining 50% using public transport<sup>33</sup>.

<sup>32</sup> This figure includes Park on Site, Kiss & Fly/Taxi, and Car Hire

<sup>33</sup> This figure includes Coach and Bus, Rail, Metrolink, and Off-Site Park and Ride

## OUR SURFACE ACCESS PLAN



Mode of Transport	Employees	
	Current c. 20,000 (22mppa)	c. 42,000 (45mppa)
Bus	12%	10%
Rail	4%	10%
Car	79%	57%
Cycle/Walk/other	5%	8%
Metrolink	see footnote*	15%

\* Initial estimates are c.5% of employees have switched from other modes to Metrolink

Figure 12: Employee Mode Share Targets

Currently, around 80% of employees use a car as either a driver or passenger. Given improvements in our infrastructure, and with concerted action by our transport operators, we are confident that we can reduce this figure. By 45mppa, our target is to reduce the number of staff driving to the airport to no more than 60%.

An increase in the proportion of employees walking and cycling to the site will be underpinned by our commitment to expand and maintain these networks. In total, we are targeting a 3% overall rise in the number of employees walking and cycling from 5% at 22mppa to 8% by 45mppa.

These are challenging targets which will require concerted action by all the partners involved. By 45mppa, there could be over 20 million users of public transport. The measures that need to be taken to achieve these targets are covered in more detail below.

### MONITORING & REVIEW

We will continue to monitor and report our performance and share this data with our partners. As with the SDP as a whole, we will regularly review our targets as circumstances require and at least every 5 years. We will hold an annual Surface Access Forum to report on progress and help deliver and shape our transport objectives.

## OUR SURFACE ACCESS PLAN



### TRANSPORT POLICIES

#### ROADS

##### AIMS

- Deliver our highway related planning obligations
- Simplify and improve our internal road network
- Maintain high quality access via the strategic road network
- Improve the local road network to meet passenger and staff needs

Over 17 million airport users travel by car and for some it is their only practical means of getting to and from the airport. Our bus and coach operations also rely on an efficient, resilient and safe road network.

We enjoy good road access due to our central location and direct links to the motorway and local road network. Quick and reliable journeys are vital to our role as the major UK gateway outside London. Our extensive catchment area is shown in Figure 13.

Figure 13:  
Manchester Airport  
Catchment Area

## SUSTAINABLE DEVELOPMENT PLAN ECONOMY AND SURFACE ACCESS



## OUR SURFACE ACCESS PLAN



Most passenger traffic uses the M56 Junction 5, while freight traffic uses Junction 6. Motorway links serve key parts of our catchment, including M6 and M62 trans-Pennine route. Local road access is via the A538 from Wilmslow and Altrincham, the B5166 Ringway Road and local links to Wythenshawe.



Figure 14: Manchester Airport Road Connections

On a typical busy day over 65,000 vehicles enter and exit the airport site. The majority of this road traffic uses the M56 but there is also a significant component that utilises surrounding local roads. Figure 15 shows the typical daily profile of passenger volumes at the airport (by terminal and airport wide) compared with the daily profile of traffic on the local motorway network (the blue bars). The peak period for airport traffic is between 04.30 and 06.30; before the normal 'rush hour' peak between 07.00 and 09.00. The peak in airport traffic is therefore outside the peak periods for other road users and at a time when congestion is much less of a problem. Airport traffic also dissipates rapidly on the strategic highway network. Our impact on the wider network is thus relatively limited and we will use our transport strategy to limit any harmful effects which our growth might otherwise have on the wider network.



## OUR SURFACE ACCESS PLAN

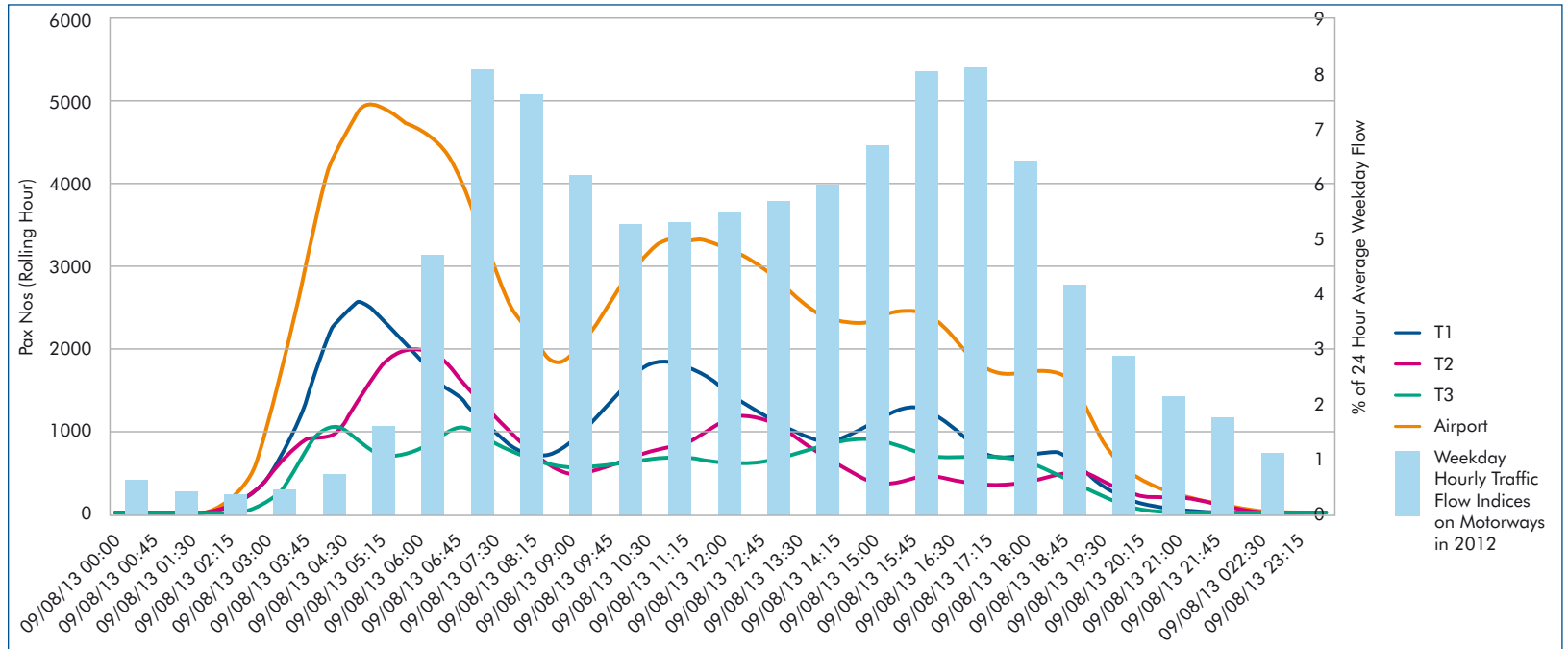


Figure 15: Typical Daily Profile of Passenger Volumes

Airport trips are especially time sensitive (for passengers and freight), and so quick and reliable road access is necessary to properly serve our wide catchment area and to attract airlines and business investment. But congestion is increasing and many parts of the network are under stress, especially parts of the M6, M60 and M62. One of the key roles of the strategic network is to handle long distance traffic and

serve key gateways such as the airport. But this does create challenges where motorways also serve large numbers of local trips e.g. the M60 around Manchester. We will continue to work with the highway authorities and TfGM to both understand the implications of airport growth and how best to manage increased road traffic.

## OUR SURFACE ACCESS PLAN



### ROAD IMPROVEMENTS

A number of improvements are planned or underway which will improve our accessibility.

#### a. A6 to Manchester Airport Relief Road (A6MARR)

Work is underway on this long standing scheme that formed part of the South East Manchester multi modal study (SEMMMS). The 10-kilometre, dual carriageway runs east from Terminal 2 to the A6 near Hazel Grove. It extends the A555 and will greatly improve access from Stockport and areas to the south and east including Cheshire & Derbyshire. As well as removing large volumes of traffic from residential areas, it will also improve access to Airport City North – the largest site in the GM Enterprise Zone. The scheme is led by Stockport, Cheshire East & Manchester councils and is part Government and part locally funded, including a contribution from the Airport Company. Completion Autumn 2017.

#### b. M60 J8 to M62 J20 smart motorway scheme

Improvements to a key section of motorway around Manchester. The package of measures includes improved signing, hard shoulder running and variable speed limits.

#### c. M6 J16 (Crewe) to J19 (Knutsford) smart motorway scheme

Conversion of one of the busiest stretches of motorway to a 'smart motorway' to improve safety, journey times and relieve congestion. Completion Spring 2018.

#### d. M56 J6 – J8 smart motorway scheme

This scheme is not yet confirmed but would link to the other strategic schemes and help tackle congestion on the western approach to the airport. Planned completion 2020.

#### e. A556 Knutsford to Bowdon Improvement

Highways England is building a new dual carriageway link road between the M6 junction 19 at Knutsford and the M56 junction 7 at Bowdon. This will relieve the congested A556 and provide quicker and safer journeys on the only non-motorway section of the route between Manchester and Birmingham. Completion is due in 2017.

#### f. Airport Western access improvements

We have existing commitments to improve the link between T2 and the M56. This includes:

- i) Improving and realigning Thorley Lane/Runger Lane .
- ii) An improved junction at Avro Way (to serve the cargo area).
- iii) Improvements to A538/M56 J6 junction.
- iv) Improvements to the A538 to access World Logistics Hub and improve access to 'west-side'.
- v) Improved slip roads between J5 and J6, M56.

These improvements are designed to improve access for traffic to and from the west and relieve congestion on the M56. They will take place as airport passenger numbers increase and will be complete by the time the airport is handling just over 30mppa.

### OUR SURFACE ACCESS PLAN



The terminal development strategy (see our Land Use Plan) will require us to review these commitments and make further changes to this part of the road network. This will include improvements to the T2 elevated roundabout; gaining access to the development sites around Junction 5 and the western extension of Airport City North. Also affecting this part of the airport site are the proposals for a new station and road links as part of Phase 2 of the HS2 high speed rail line between the Midlands and Manchester. The Greater Manchester partners have suggested a revised proposal, which better integrates the HS2 station with the airport and local transport system. This issue will be kept under review in the light of the Government's approach to HS2.

#### g. Internal road network

Parts of this network, especially around Terminals 1 & 3 are complex, difficult to navigate and suffer from congested junctions. Our strategy is to move traffic from T1 to T2. This will enable us to simplify and improve our road network – making customer journeys easier and quicker and providing a more efficient system. Improvements will be made to the main T2 access points (including World Way and Sydney Avenue) and a new direct link to the T2 forecourt. These changes will complement the external road improvements outlined above and will form part of our investment programme for the terminal complex.

We have permission to realign 'old' Ringway Road between T3 and the Airport Hotel. This scheme would facilitate any further eastern expansion of the T3 terminal and aircraft stands.

In the western part of the site, we will review how best to serve the growing cargo and maintenance area and deal with increasing congestion on Avro Way. A new signalised access on to the A538 would improve links to the World Logistics Hub and western side of the airport, and tie in with the dualling of the adjacent section of the A538.

## OUR SURFACE ACCESS PLAN



### RAIL

#### AIMS

- Work with Transport for the North, TfGM and the new Trans Pennine Express and Northern franchise operators to increase rail use, reduce journey times and improve the passenger experience,
- Press for early completion of the Northern Hub investment programme,
- Secure more frequent and direct services, including to the west, North Wales and south via Crewe
- Support the early delivery of HS2 and a station serving the airport,
- Reduce journey times and radically improve east-west connectivity as part of the @northern Powerhouse Rail investment programme
- Work with Arriva Trains Wales/the Wales and Borders Franchise (or Welsh Government with regards to future devolved franchise)
- Improve rail access from Cheshire West and Chester and North Wales

Rail is the busiest and most important part of our public transport system. Currently, over 4 million airport rail trips take place. Our railway station is currently served by two operators. Trans Pennine Express provide direct intercity services across the North of England while Northern Trains serve Liverpool, Southport and Crewe.

Nine trains per hour operate between the airport and Manchester Piccadilly, with a fast journey time of between 15 and 25 minutes. Rail serves an extensive catchment area, with all of the largest conurbations within the North of England having at least an hourly direct service, with a typical journey time of less than 2 hours in most cases. Figure 16 provides a summary of key rail links (at December 2015).

Service Provider	Origin	Approximate Journey Time	Weekday Frequency
TransPennine Express	York	2 hours	34 services a day
TransPennine Express	Leeds	1 hour 20 minutes	34 services a day
TransPennine Express	Sheffield	1 hour 20 minutes	19 services a day
TransPennine Express	Preston	1 hour	36 services a day
TransPennine Express	Blackpool	1 hour 45 minutes	18 services a day
TransPennine Express	Newcastle	3 hours	12 services a day
Northern Rail	Liverpool	1 hour 10 minutes	15 services a day

Figure 16: Summary of Key Direct Rail Journeys to Manchester Airport

## OUR SURFACE ACCESS PLAN



### RAIL SERVICES

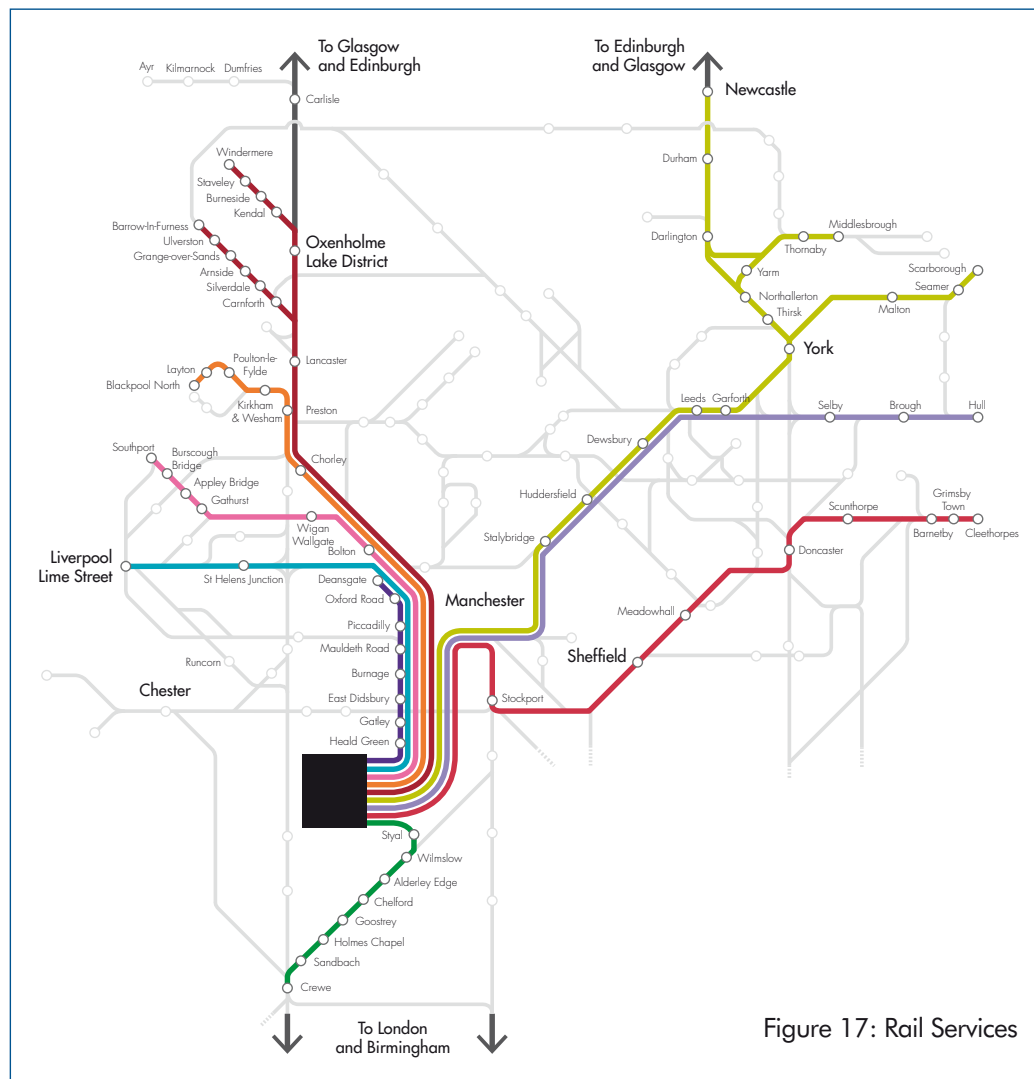


Figure 17: Rail Services

### OUR SURFACE ACCESS PLAN



New franchises for Trans Pennine Express & Northern commenced in April 2016. These will build on the success of the current franchises and deliver significant improvements for our passengers. These include:

- Improvements in rolling stock, more seats and longer trains
- Increased frequencies and reduced journey times
- More early morning and Sunday trains
- New direct services to Warrington, Barrow and West Yorkshire
- A range of passenger improvements both on the trains and at key stations
- Simpler ticketing and fares
- Improved information before and during the journey.

These improvements, along with the Northern Hub infrastructure schemes, will be important to achieve our rail mode share targets and we will work closely with DfT, Rail North and the train operators to secure the maximum benefit from the new franchises.

Our current rail services are heavily skewed to the north. Services to the south are poor, with only a limited hourly service to Crewe. There are no direct services to Chester and North Wales. This denies large areas in the Midlands and Wales a direct rail link to a major airport gateway, and adds to pressure on congested roads. We will work with the Welsh Government, Wales & Borders franchise operator and local authorities to secure improved services to North Wales, and with other train operators and local authorities for much improved services to the west and south via the planned Crewe Gateway, in advance of the major opportunities presented by the HS2 and Northern Powerhouse Rail proposals.

### RAIL IMPROVEMENTS

#### NORTHERN HUB

This is a major investment programme to increase capacity and improve services and reliability across Manchester and the North of England. It is scheduled to be completed by 2018. The key elements are:

- Additional platforms at Rochdale and Stalybridge (4th Platform at The Station now built);
- A new Ordsall Curve, between Salford Central and Deansgate;
- Improvements to through platforms, 13 and 14 at Manchester Piccadilly and two new through platforms, 15 and 16;
- Removing bottlenecks and signalling improvements.

The result will be a significant re-organisation of Manchester rail services and will increase the number of airport trains from 9 to 10 trains per hour.

#### OTHER RAIL SCHEMES

- 'North West Triangle' electrification of the routes between Manchester and Liverpool; Liverpool to Preston and Blackpool to Manchester. This will reduce journey times and improve services.
- North Trans Pennine Route electrification between Manchester and York will reduce journey times between Manchester and Leeds to around 45 minutes.



### OUR SURFACE ACCESS PLAN



#### WESTERN RAIL LINK

There were previously proposals for a western extension of the airport rail spur, linking to the Manchester – Chester railway line. This was part of the earlier strategic planning for rail in the North West but has not been taken forward by Network Rail. During consultation on our draft Plan, a number of consultees asked that the proposal be reconsidered as it would provide much improved access to North Cheshire and North Wales. Shorter journey times, and new direct services would serve some key towns and cities. We can see benefits from making the airport a ‘through station’. However, we do not believe the costs can be justified on airport traffic alone. We are however prepared to continue to safeguard an alignment through the airport site and will press for improved east – west links as part of the Northern Powerhouse Rail work (see below). We will press for better rail services from these areas using existing infrastructure e.g. via Crewe.

#### HIGH SPEED RAIL

This is a Government led scheme to significantly increase rail capacity. Phase 1 (London to Birmingham) is planned to open in 2026. Phase 2 (to Manchester and Leeds) is proposed for 2033. We support this major investment in the national rail network because of the economic and passenger benefits it will bring, the reduction in journey times and the additional capacity it will provide. The current plans for Phase 2 include a new station at the airport – just to the west of Terminal 2. Government decisions on HS2 phase 2 are expected later in 2016.

Indicative journey times to Manchester Airport station would be 59 minutes from London Euston, 32 minutes from Birmingham Curzon Street, and 9 minutes from Manchester Piccadilly. This would make journey times to London or Birmingham similar to or shorter than journey times to cities across the North of England on the existing

railway network. The new line also opens up potential improvements to services to the west and north.

As well as new high speed services, a major benefit is the released capacity on the congested West Coast Main Line. This should allow for new services to the airport from Crewe and to key unserved parts of the catchment area – including to the East & West Midlands, The Potteries and Wales.

#### NORTHERN POWERHOUSE RAIL

Better connectivity between northern cities is a key element of achieving the aspirations of a Northern Powerhouse, with many rail journeys being too slow and taking longer than journeys of equivalent distance else in the country or in Europe. There is a growing commitment to an ambitious vision for rail in the north. In March 2016 both Transport for the North<sup>34</sup> and the National Infrastructure Commission<sup>35</sup> published reports which emphasised the benefits of better connections between key northern cities, and between those cities and the global gateway of Manchester Airport.

The vision will see radical reductions in journey times and improvements in service frequency and quality. The focus is on improving east-west connectivity, building on the Northern Hub and electrification schemes. The new routes would be closely integrated with HS2, with the Airport becoming a crucial node in this network. Enhancing the North’s global and national connectivity in this way will facilitate and accelerate the Northern powerhouse economic strategy.

<sup>34</sup> Transport for the North – ‘Northern Transport Strategy’ Spring 2016 report

<sup>35</sup> National Infrastructure Commission – ‘High Speed North’ March 2016

## OUR SURFACE ACCESS PLAN



We will work closely with local and regional partners to promote the case for these nationally significant investment and transport programmes.

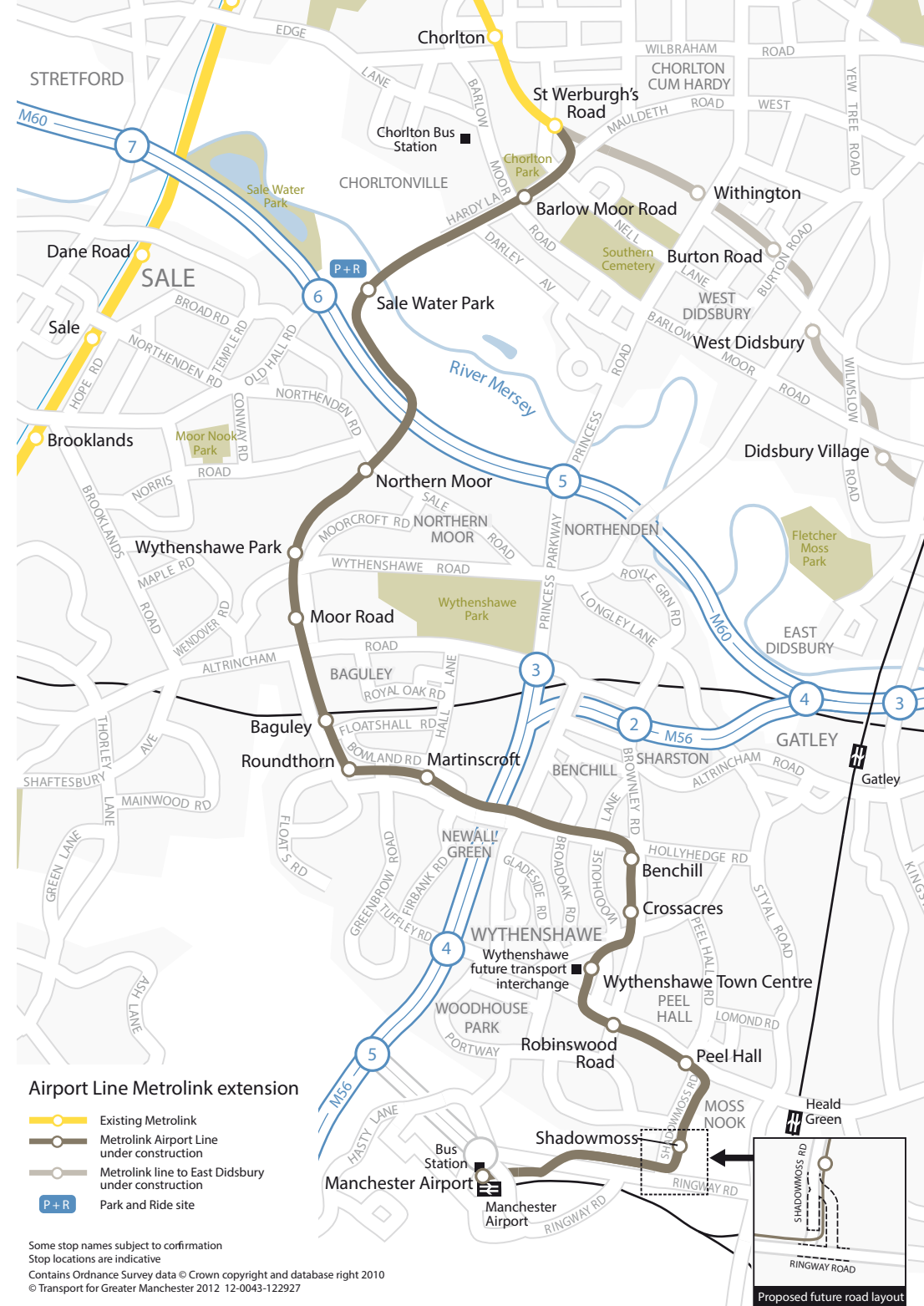
### LIGHT RAIL – METROLINK

Metrolink is Greater Manchester's highly successful tram system. In December 2014, the new line to the airport opened. This was 12 months ahead of schedule. The 14.5 km line provides a further connection to Manchester city centre, and has 15 new stops on its route from Chorlton. These include a new combined tram and bus interchange in Wythenshawe town centre and a park and ride site adjacent to the M60 at Sale Water Park. The route is shown in Figure 18.

### AIMS

- Promote Metrolink as a sustainable choice for airport users
- Extend tram services beyond Cornbrook when the second city crossing is completed in 2017
- With partners, review the business case for the western extension of the Metrolink line from the airport.

Figure 18:  
Airport Line Metrolink



### OUR SURFACE ACCESS PLAN



Trams operate on a 12 minute frequency six days a week and on Sundays and Public Holidays between 08:00 and 17:30, with a journey time between central Manchester and the airport of approximately 45 minutes. In 2016, early morning services (from 03.00) were introduced to better meet the needs of airport users. Metrolink is particularly designed to:

- Improve links between the airport, Airport City and Wythenshawe to help increase local employment;
- Provide a convenient, direct connection to many parts of Greater Manchester benefiting both passengers and the large numbers of staff who live in Greater Manchester; and
- Offer an alternative route to the city centre.

Currently, services run only to Cornbrook where a change is necessary on to the rest of the network. TfGM is now constructing the 'Second City Crossing', which will provide another tram route across Manchester City Centre. On completion in 2017, this will remove the bottleneck in the city centre and provide additional capacity across the Metrolink network. It will also allow direct services from the airport through, and beyond, the city centre thus improving access to other parts of Greater Manchester.

Metrolink is a key part of our green travel plan for staff, offering discounted fares, reducing car use, serving non car users and offering convenient local services into the heart of the site. Initial estimates are that c. 5% of staff journeys are already being made by tram. By 2030, our target is for 10% of staff to be using Metrolink, increasing to 15% beyond then. Bus travel over this same period may decrease slightly as the Metrolink extension captures a number of local trips.

The original Metrolink scheme included a western link from the airport to Wythenshawe Hospital. By joining to the existing line at Roundthorn, a loop would be created around Wythenshawe allowing a higher frequency (6 minute) two way service around the loop. This would not only increase capacity and frequency to the airport, but also provide improved connections to the hospital, employment sites in the Airport City Enterprise Zone and better access to jobs for local people.

Parliamentary approval was granted for the western extension, and a 75 metre tunnel has already been provided beneath the airport station. The safeguarded route from the Station passes alongside the T2 multi storey car park, north of the T2 apron and across the M56 via the new Thorley Lane bridge. Since the original concept, proposals for a HS2 airport station have been announced. This is planned for a site just south and west of the Thorley Lane bridge. The initial views of the Airport Company and other Greater Manchester partners are that there are benefits in linking Metrolink and HS2, both to provide improved local connectivity and also to act as the transit link between the HS2 station and the airport passenger terminals.

We will continue to support the completion of the western extension and work with HS2 and other partners on the potential to link to HS2. We will safeguard an appropriate route for Metrolink, as part of the ongoing T2 investment programme and, with TfGM, consider the case for accommodating an additional stop at T2.



## OUR SURFACE ACCESS PLAN



### GREATER MANCHESTER TRAM-TRAIN

TfGM is currently exploring the potential for tram-trains, a new concept which aims to have the benefits of both heavy rail and trams. It has many similarities to Metrolink, but the specially designed vehicles are able to run on street tracks and also share tracks with conventional trains. It could improve frequencies and provide new services.

An initial feasibility study identified Manchester to Marple via Bredbury as the most economically viable route. A number of other routes are under consideration as part of a potential tram-train network. The Stockport to Altrincham corridor would improve orbital connectivity, using a combination of the existing freight rail line and Metrolink lines. It would be a new public transport option for the airport area. It could also potentially serve the Airport City Enterprise Zone and the proposed Manchester Airport HS2 Station.

We will continue to work with TfGM on the feasibility of tram-train as an option to improve airport accessibility.



## OUR SURFACE ACCESS PLAN



### BUS AND COACH SERVICES

#### AIMS

- Work with operators to extend the range and frequency of services to meet the needs of passengers and staff
- Improve links to under-served destinations including the Potteries, West Midlands, East Lancashire and South and West Yorkshire
- Support off-site bus and coach priority measures, including on the new A6 MARR, to improve journey time reliability
- Improve the on-site bus services to better link The Station to key employment areas.

#### COACH

Coach services provide high quality, cost effective long distance travel as an alternative to the private car. Given their flexibility, coach services can be introduced relatively quickly to facilitate and meet demand. They are the only public transport choice for those areas where there is no direct rail connection or where rail services are overcrowded. We have a large network of coach services, linking the airport with cities across the region and nationally. National Express operates approximately 50 direct services per day from major cities such as London, Birmingham, Sheffield, Liverpool, Edinburgh and Glasgow. These include 24 services a day direct to Manchester city centre. Coach services operate from a dedicated section of The Station interchange. Arrival and departure times of services are displayed on electronic screens within the terminal.

Origin	Number of services per day	Approximate journey time
Birmingham	11	2 hours 30 minutes
Leeds	8	2 hours 20 minutes
Bradford	8	2 hour 50 minutes
Liverpool	7	50 minutes
Sheffield	3	2 hours 5 minutes
Glasgow	3	5 hours 30 minutes

Figure 19: Summary of Key Coach Services Operated by National Express at Manchester Airport

Outside London, the UK coach market is relatively small, and it has struggled to grow beyond its core passenger markets. It can be very competitive on price, but is also vulnerable to the increasing congestion on the strategic road network. Congested highway routes ultimately result in unreliable journey times, which in turn significantly impacts on the commercial viability of routes. We do see scope to increase the extent of our coach network, offering choice but also to serve those towns and cities without convenient rail services. Target markets are Chester, North Wales, East Lancashire and the Midlands.

Our assessment shows potential to increase coach use, in line with passenger growth. So we are committed to working with operators to understand the dynamics of the coach market serving the airport, as well as examining measures to provide new routes and promote and advertise the network to increase patronage.

We also believe there is scope for new products and services; offering fast inter urban express services across the north, or shorter routes (across Greater Manchester for example) complementing the current bus and coach networks.

## OUR SURFACE ACCESS PLAN



### BUS

Local bus services are provided by Stagecoach, Arriva and Trent Barton. Together, they provide a significant network, particularly across south Manchester. Bus is a flexible and adaptable form of public transport, without the constraints of fixed track infrastructure and with lower operating and infrastructure costs. However, it is also reliant on the efficiency of the road network and despite various bus priority measures, bus journeys suffer from congestion, delays and unreliable journey times. The airport's 24 hour, 7 day a week operation can pose a commercial challenge for operators, especially for early morning, late evening and weekend/Bank Holiday services.

Operators have invested in modern, low emission vehicles, providing a good quality of service. Various discounted tickets schemes have been introduced, aiming to encourage regular use e.g. staff commuting. Bus services compete with tram and rail services, offering choice and competition. But for many areas, without fixed links, they may be the only public transport option. This is particularly the case in Cheshire, where few direct rail services exist and serving free standing towns and rural areas is a particular challenge. Conventional bus services are less suited to the lower volume demand from these areas and more innovative solutions may be required. We will work with Cheshire East Council to develop new services and improve access for both passengers and staff.

To serve areas further afield, and as highlighted in the 'coach' section, there may be a case for high quality express bus services that can more effectively compete with taxis and the private car.

In and around the airport site are a variety of public and private bus services, including those serving the airport's own on site long stay car parks, staff car parks, the various airport hotels and the car rental village. The airport is a very large and dispersed site, with some employment areas – e.g. the West side and World Logistics site being some distance from the public transport interchange at The Station. This can be a barrier to staff use of train and tram. We will therefore explore the case for a more efficient and better integrated network of on-site bus services, while recognising the differing needs of users, be they passengers or staff.

Service	Route	Frequency
Skyline Stagecoach 43	Manchester City Centre via Rusholme, Fallowfield, Withington, Northenden and Wythenshawe	Every 10 minutes
Skyline Stagecoach 105	Manchester City Centre via Princess Road, Northenden, Benchill, Wythenshawe and Portway	Every 30 minutes
Skyline Stagecoach 369/x69	Stockport via Edgeley, Adswold, Cheadle Hulme, Heald Green and Wythenshawe	Every 30 minutes
Arriva 18	Altrincham – Trafford Centre via Stretford, Sale, Baguley and Wythenshawe	Every 30 minutes

Figure 20: Local Bus Services to Manchester Airport



## OUR SURFACE ACCESS PLAN



### COMMUNITY TRANSPORT

Community transport services provide access to the airport for those who do not have access to a car, or who are unable or unwilling to use conventional public transport. Transport for Greater Manchester operate a comprehensive 'Ring and Ride' service that provides a door to door accessible mini bus service for people of all ages. The service covers all Greater Manchester, including an individual service in south Manchester that incorporates areas such as Wythenshawe, Gatley, Didsbury, Levenshulme, and Hulme.

TfGM also operates the Wythenshawe 'Local Link'. This offers a 24 hour, door to door flexible service focused on residents of Wythenshawe. It potentially lends itself to airport trips, especially to more dispersed locations or at unsocial hours. Discounted weekly and season tickets are available. Users need to pre-register and pre-book journeys making it less suitable for ad-hoc or irregular journeys. We will work alongside TfGM to adapt and promote this service to meet airport user's needs.

### OUR SURFACE ACCESS PLAN



#### TAXIS

Taxis are a flexible and important option for passengers and staff who do not have access to a car, or who are unable or unwilling to use conventional public transport. Outbound taxi services are provided at each terminal by licenced black (hackney) cabs and Arrow Cars, an independent pre-booked private hire service.

But by far the greatest use of taxis are private hire vehicles booked direct by passengers. Together with passengers being picked up or dropped off by friends or relatives, these 'kiss and fly' trips amount to over 50% of passenger journeys. Convenience, price and availability at all hours are key influences on passenger choice. They are the largest component of our road traffic, as every return air trip generates four car trips. This is double the amount of car trips compared with parking on-site, and thus adds to congestion and increased CO<sub>2</sub> emissions. Managing 'kiss and fly' is a key issue at many airports across the UK. Our target is to reduce kiss and fly use both by improving and widening the range of public transport alternatives and by making on-site parking a competitive and convenient option.

#### CYCLING AND WALKING

##### AIMS

- Promote and incentivise increased staff use of cycling
- Improve cycle parking and changing facilities across the site
- Investigate the case for a cycle hub at The Station
- Improve on-site and external cycle and pedestrian routes, including links to Airport City.

Cycling and walking are part of an integrated transport plan, particularly for staff living nearby. They can help reduce emissions and congestion while offering a healthy, easy and cheap option. Cycling can be an effective way of gaining access to the public transport network, particularly for employees in rural area where the distance to the closest station or bus service is beyond a reasonable walking distance.

An airport orbital cycle route has been built, alongside a number of footpath links. These provide safe and convenient routes between the airport and surrounding residential areas. They also link in to the longer distance strategic cycle routes in Greater Manchester and Cheshire, serving both commuter and leisure cyclists.

## OUR SURFACE ACCESS PLAN

Manchester Airport Orbital Cycleway:  
An 8 mile cycle circuit around Manchester Airport

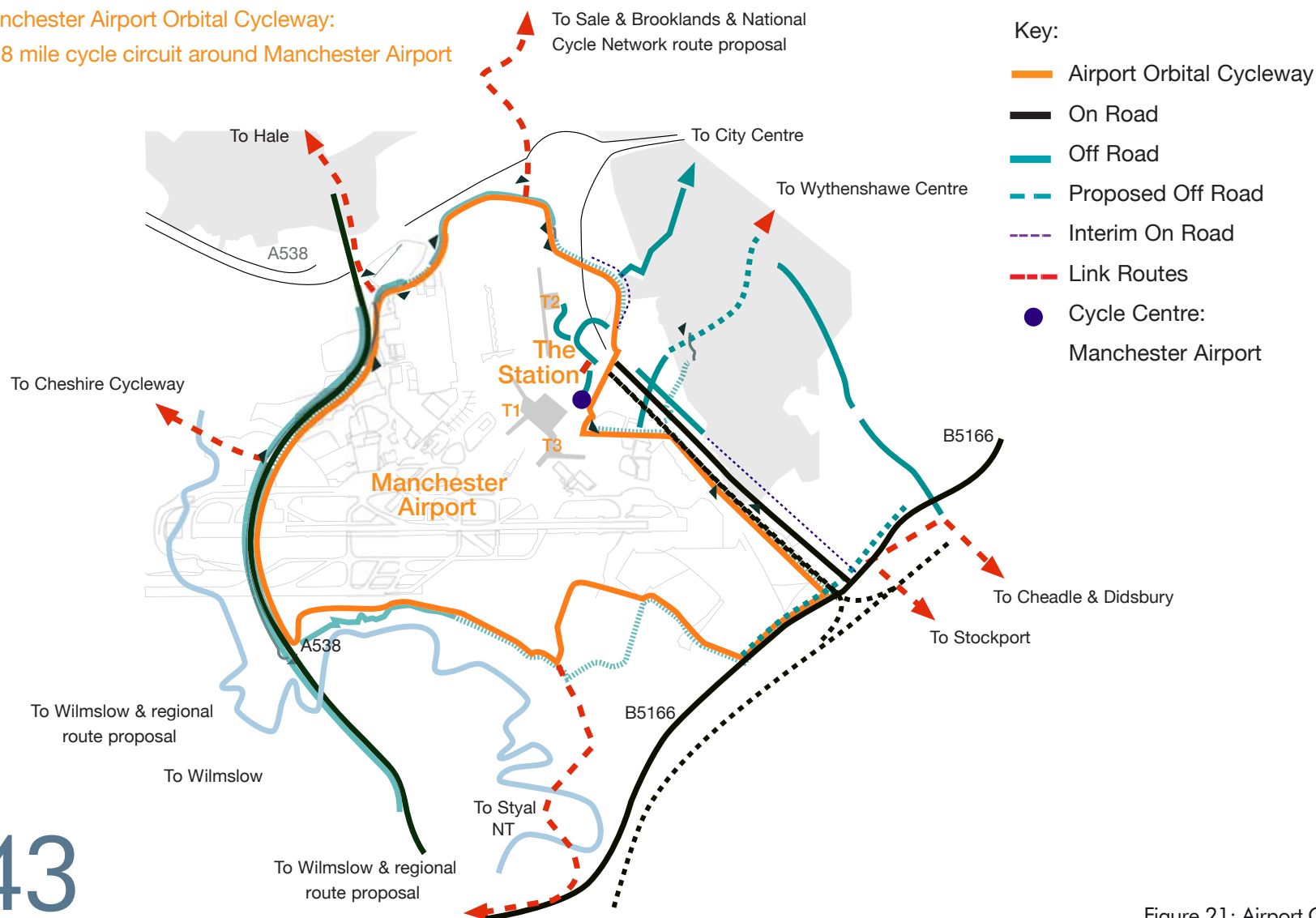


Figure 21: Airport Orbital Cycle Network

### OUR SURFACE ACCESS PLAN



Our previous Cycling Development Plan resulted in the delivery of:

- 240 cycle spaces at 17 high-quality cycle parks;
- A Bicycle Users Group, with approximately 200 members;
- Pool bikes and interest free loans for bike purchases; and
- Funding for cycle paths feeding into the airport.

Motorbikes are also a popular option for staff, using the road network but with dedicated parking facilities close to major employment areas.

We will continue to work closely with the local authorities, TfGM and other key partners to maintain key routes and deliver new measures designed to encourage a greater level of cycling. As well as the expansion of our cycle and footpath network, we will also work with highway authorities to ensure that networks remain safe to use. This includes maintenance as well as providing and updating signage, lighting, parking and changing facilities to meet the needs of users.

We supported Manchester City Council and TfGM in the development of the Velocity 2025 cycling proposals. This £20 million scheme will deliver a major cycling education and infrastructure programme across Greater Manchester. It includes a number of segregated, super cycle ways. These 'Spokes' include the Airport City Enterprise Cycleway – a series of improved cycle links from the airport to residential areas in Wythenshawe, the hospital and town centre.

Our commitment to expand and maintain these networks should lead to an increase in the proportion of employees walking and cycling to the site. Our target is a 3% increase – from 5% to 8% by 45mppa.

### THE STATION

#### AIMS

- Develop a long term phased investment plan for The Station in 2016
- Create a direct access to Airport City in 2016 to encourage public transport use
- Reorganise the operation of the bus and coach forecourt as part of Airport City
- Assess options for linking The Station to the proposed HS2 station.

Since opening in 2002, our public transport interchange, The Station, has been at the heart of our developing transport network. It provides convenient transfer between rail, tram, coach and bus and is directly linked to the passenger terminals by an enclosed elevated walkway – 'Skylink', the main pedestrian route through the site. The Station also acts as a sub-regional transport hub for surrounding communities – especially for access to strategic rail and coach services.

The initial 2 platform railway station has been expanded and developed to now include:

- 4 rail platforms;
- 2 Metrolink platforms;
- 13 bus and coach bays;
- Taxi rank;
- Pick up & drop off forecourt;
- Ticketing, waiting, information and passenger facilities; and
- Shops and catering.

### OUR SURFACE ACCESS PLAN



The Station is now used by over 4 million passengers a year (passengers and staff). This figure will grow significantly, with airport growth, modal shift to public transport and the development of Airport City and the 15,000 new jobs it will create nearby.

This growth, combined with problems of congestion, ageing assets and changes in circulation have led us to review how The Station should operate and develop in future. An initial concept study has been carried out, in conjunction with transport operators. This suggests:

- making better use of the central atrium to provide a larger, central concourse;
- relocating and improving ticketing and information desks;
- extensive new retail and catering units on the ground floor;
- removal of escalators and new access to the rail platforms;
- improved access to 4M offices and Airport City offices and hotels; and
- energy efficiency measures and natural ventilation.

In the longer term, this would also allow for the building to be extended to cope with larger volumes of traffic. As part of our work on the internal road network, we will also review whether the forecourt and pick up/drop facilities are in the best location.

In 2016, working with TfGM, operators and the new rail franchisees, we expect to produce a long term phased investment plan for The Station.



Artist's impression of possible Station improvements

### OUR SURFACE ACCESS PLAN



#### INFLUENCING THE TRAVEL CHOICES OF OUR PASSENGERS AND STAFF

##### AIMS

- Review our Green Travel Plan for staff in 2016
- Support improved journey planning and better information before and during the journey
- Press for simplified and discounted multi-modal ticketing using smart technology
- Devise a quality measure for public transport and encourage operators to adopt this measure.

Our ambition is to provide passengers and staff with the widest range of affordable, accessible, reliable and frequent public transport options. Key to this is thinking about the whole end-to-end journey, and meeting the particular needs of our passengers and staff. We will research and better understand travel needs, monitor performance and work with our partners to develop action plans. The quality and reliability of journeys is a significant influence on passenger choice.

Our research shows that making the customer journey easy can be a powerful influence on behaviour. Key factors to focus on are:

- better and more accessible journey planning tools on transport services and options;
- improved real-time information on strategic roads, at public transport stops and on buses, trams and trains;
- better information and greatly simplified fares, including multi-modal ticketing, smart technology and easier ways to purchase;
- improved passenger facilities away from the airport e.g. car

parking, waiting facilities, airport information at stations – appropriate to the time of travel and scale of use; and

- on board services on public transport that meet the needs of airport users e.g. luggage storage, Wi-Fi and airport information.

##### STAFF TRAVEL

Since our first Surface Access Strategy, we have sought to reduce car use by staff by offering alternatives and promoting more sustainable modes of travel. This is coupled with our policies for the location and pricing of staff parking on site; which is increasingly in peripheral locations, with bus links to the main terminal and employment areas. As explained earlier, staff are drawn from a wide catchment area, but with the largest concentrations in the southern half of the conurbation. As a 24 hour a day, 7 day a week operation, the vast majority of staff work shifts with shift patterns structured around the airline flight schedules. This poses significant challenges for public transport operators because of the very different profile from most commuter journeys.

To achieve our targets for public transport use requires improvement and investment in bus, tram and rail services. These have been described earlier. This will be complemented by a range of incentives, discounts and demand management measures. A significant number of staff rely on car-sharing, whether formally through online services (e.g. Liftshare.com), or through informal arrangements with colleagues. Car-sharing will continue to be promoted. Given the operational nature of the airport business there is little opportunity for home working by airport staff except for office staff.

Airport staff already benefit from some discounted fares on public transport. We will seek to improve, extend and more aggressively promote these incentives, in part based on the increased patronage



### OUR SURFACE ACCESS PLAN



that operators will attract. Travel planning is an integral part of the induction process for new staff, so that sustainable travel becomes the preferred choice. More extensive marketing will be implemented across the site, and closer working with the larger employers to better understand their needs and promote joint travel planning activity.

As with air passengers, staff would benefit from improved journey planning; better real time information on both roads and public transport and improved cross modal and smart ticketing.

#### CAR PARKING

##### AIMS

- Provide a range of safe, secure and convenient car parking products to meet passenger needs
- Extend T2 and T3 short-stay multistorey car parks to meet demand
- Work with Local Planning Authorities to monitor off-site airport car parks and oppose proposals where appropriate
- Investigate the case for strategic park and ride facilities with sub-regional partners.

Despite our growing public transport use, there is not always a viable or convenient alternative to the private car. Approximately half our passengers still use the car. This includes passengers driving themselves and parking, or being picked up and dropped off by others, or by taxi. We need to provide an appropriate level of car parking within the airport boundary to meet future demand and avoid illegal parking nearby. We discourage on-road parking for safety and security reasons.

There are many forms of car parking product required to meet the differing and changing needs of our passengers, visitors and staff. Parking is an integral part of our Ground Transport Plan and plays a role in managing traffic and our CO<sub>2</sub> emissions.

Car parks are provided within the Airport Operational Area and are operated by the Airport Company. This provides economies of scale and enables car parking to be an integral part of our overall Ground Transport Plan. In addition, there are 'off-airport' car parking sites that are independently owned and operated. Traditionally, we have operated two different products – short-stay and long stay. However, provision has now altered as passenger needs have changed. The introduction of 'meet and greet' and valet parking and price differentiated products, particularly in the long stay sector have been very successful.

Demand for car parking is complex and is influenced by many factors. These include: customer convenience, time of travel, the availability and frequency of public transport, the mix between business and leisure travellers, the mix between short and long haul and between scheduled, low-cost and charter flights. Over time there has been considerable variation in all of these factors, but from a safety, congestion, convenience and operational point of view, it is necessary for the airport to have sufficient car parking capacity to meet peak demand. This should also help prevent unauthorised parking on local roads, where it can be a nuisance to local residents and add to congestion and safety problems. For long stay parking, the peak demand is in the summer months and main holiday times. For short stay, it fluctuates greatly, with daily peaks related to flight arrivals and departures as passengers get picked up and dropped off.

Managing car parking demand is integrated with our policy to increase public transport use and to contain the growth in airport-

### OUR SURFACE ACCESS PLAN



related road traffic. We have, over time, pursued a variety of actions to manage demand for parking, including pricing. However, increasing parking charges, in an effort to deter car use and encourage public transport use, actually led to an increase in the level of private hire taxi and pick-up and drop-off activity and more road trips. These kiss and fly and taxi trips have the greatest mode share (c 50%) and are the largest contributor to road traffic volumes. Our objective is to reduce the traffic caused by kiss and fly (private hire and pick-up and drop-off) activity by a mix of attractive public transport options, competitive pricing and careful management of our forecourts.

Another factor, which is beyond our direct control, is the availability of third party controlled off-airport parking. Historically, this has varied greatly and has been as much as 50% of the total parking provision. But it is an uncertain supply. Some sites are authorised sites operated by 'consolidators', but a significant proportion are unauthorised or seasonal operations. These sites are subject to local authority planning control and we work with adjacent authorities to monitor the operation and scale of this supply.

#### SHORT-STAY CAR PARKING

The most intensively used car parks are short stay and are found next to the three terminals. There are currently 5,707 short stay spaces in three multistorey car parks and a further 1,226 surface-parking spaces. These spaces are the least likely to be used by passengers driving themselves, with the main use being by people dropping off passengers or meeting them on arrival.

Short-stay parking is essential for the safe and efficient operation of the road network and terminals and is an important part of our forecourt policy. We will continue to provide this type of parking within the core

terminal area and schemes to increase/replace capacity of these facilities will be brought forward during the plan period as part of the wider terminal investment programme. Our plans for developing the T2 complex will require extensions to the existing multi storey, additional multi storey spaces and eventual loss of the T1 multi storey car park. Permission has been given to extend the T3 multi storey car park. We anticipate that overall demand for short stay spaces adjacent to the terminals will continue to rise commensurate with passenger numbers.

#### SHORT-STAY PARKING POLICY

##### AIMS

- We will develop additional and replacement short-stay parking capacity within the core Terminal area This will include extensions to existing multistorey car parks along with the provision of new multistorey capacity in the vicinity of Terminal 2 and The Station as part of Airport City.

#### LONG-STAY CAR PARKING

Long stay car parking is currently provided by both the airport company on-site or by third party operators off-site. It is generally divided into two types of product; either 'self-parked' by the passenger, or 'valet parked' after being left at a reception facility.

Within the airport site, a vehicle can be self-parked by the passenger on one of a selection of surface car parks remote from the terminal buildings. These passengers can either have pre-booked a space or just turn up at the airport expecting to find a space. The amount of turn-up traffic is declining thanks to the rise in internet booking. Passengers in these car parks are transferred to the terminals by courtesy bus. The self-park car parks are price differentiated depending upon timings between buses, proximity to terminals and relative quality of the parking areas.

### OUR SURFACE ACCESS PLAN



Alternatively, passengers can pre-book a parking space, drop their car at reception facilities adjacent to the terminals and have their vehicle moved and stored on-site (Meet & greet). This storage currently takes place on some dedicated sites but also within conventional long-stay car parks. In land use terms, the most efficient way to store these vehicles is by 'block parking'. Vehicles are parked in columns arranged by collection time. This does rely on having precise passenger travel schedules and new management software will be rolled out to help to facilitate the increased use of block parking. This will increase the capacity of the site to accommodate long-stay parking.

There are currently 26,500 long-stay spaces on-site divided by product type as follows:

- Long-stay
- Long-stay Jet Parks

Local authorities report that there are circa 24,000 spaces in off-site, independently operated provision. However, many of these potential spaces are either not operating or operate on a very seasonal basis. Our latest estimate is that there is probably less than half this number actually in operation.

A number of land uses have very precise locational requirements. These include taxiways, apron, and terminal facilities. This has resulted in other uses such as long stay car parking being moved towards the periphery of the site. To maximise efficiency in land use we have often used car parking as an interim use, pending operational development e.g. aprons taking place. This is the case for the large T2 long stay car park which will be gradually converted to apron. Our permanent long stay spaces are likely to be the new large car park of c 9,000 spaces at Styal Road/Shadowmoss Road, and the c 7,000 spaces off Hollin Lane (Jet Parks 3 and Jet Parks Plus) on the south side of Runway 1. With

growth, and an increasing pressure on land, we will review the case for additional multi storey or decked car parks even for uses other than short stay parking. The current T1 long stay car parks, land to the west of Terminal 2 and sites on the Westside are the most likely locations. There are also undeveloped sites within, and on the perimeter of, the Operational Area where surface parking may be appropriate.

#### LONG-STAY PARKING POLICIES

##### AIMS

- We will continue to provide sufficient long-term parking to meet demand and be the 'provider of last resort'.
- Additional and replacement long-stay car parks will be developed at both surface and multi level on land to the east and west of the operational area. Any multi-story structures will be designed having regard to their surroundings and location.
- We will optimise the capacity of on-site parking through 'block-parking'
- Long term opportunities for strategic park and ride and passenger processing at locations remote from the airport will continue to be explored.

#### STAFF PARKING

We have in the region of 5,000 staff parking spaces at a number of locations across the airport site. This equates to almost 4 members of staff per parking space. A charge is made to on-site airport companies for permits in communal car parks. Some employers pass this cost onto their employees. The largest car park is adjacent to the cargo area and staff are bussed to the main terminal campus. As the T2

### OUR SURFACE ACCESS PLAN



apron expands, much of this space will be lost. Large, communal provision is most efficient and we may need to provide decked parking for staff. This is likely for the staff car parks in the Westside cargo & maintenance area where significant numbers of staff are now employed. We will also consider how best to utilise staff spaces, depending on the origin and destination of the journey. In the long term, we expect the scale of staff parking to increase from the current 5,000 spaces to around 5,800 spaces at 45mppa.

#### STAFF PARKING POLICY

##### AIMS

- We will continue to provide staff parking on a mix of sites across the airport site but we anticipate being able to increase the number of employees per space as further public transport improvements come on-line.

#### CAR HIRE

Around 3% of passengers use hire cars with all the major car hire companies represented on site. Historically, car hire facilities were provided at each terminal. To make better use of our land, in 2012 we developed a new car hire village, consolidating all 'ready and return' spaces with maintenance facilities at a single site on Ringway Road. Passengers are bussed to the terminals by courtesy bus. Around 1,200 spaces are provided at this site. This facility is expected to remain in its current location in the medium term.

#### PARK & RIDE

Traditionally, park and ride facilities are provided at some railway stations, and points on the Metrolink network (e.g. Sale Water Park). They have limited use by air passengers. Some off airport car parks

operate in a similar way; intercepting the passenger on their journey to the airport, completing it by bus. But these are ad hoc and do not form part of a wider strategy. As road traffic and congestion increase generally, and airport growth continues, we can see a case for a more strategic view of park and ride.

This could be at key points on the rail or motorway network, where significant numbers of passengers could be attracted and transferred to the airport by high frequency bus or train services. Such sites would need high quality access, fast and reliable connections and could be linked with related passenger facilities e.g. remote check in, catering and hotel provision. Such sites may be best considered on a sub-regional level, potentially linked to serving other major destinations e.g. city centres or major employment sites. Possible areas of search would be to the west, served from the M6/M56/M62 or to the east of Manchester, close to cross- Pennine rail or road routes (M62, A57). We will work closely with local authorities, highway agencies and TfGM to investigate this potential.

Overall, we expect the on-site parking provision to increase as passenger numbers increase, but we will look increase the ratio of passengers per on-site space through the promotion and availability of public transport alternatives and because there will be a finite availability of operational area land on which to provide increased supply.

#### A TIMELINE OF INFRASTRUCTURE DELIVERY

There are a number of additional infrastructure schemes that are either currently being delivered, have funding approval or are in the planning stage that will further enhance the capacity and efficiency of our surface access network. These schemes have been set out in Figure 22.

## OUR SURFACE ACCESS PLAN

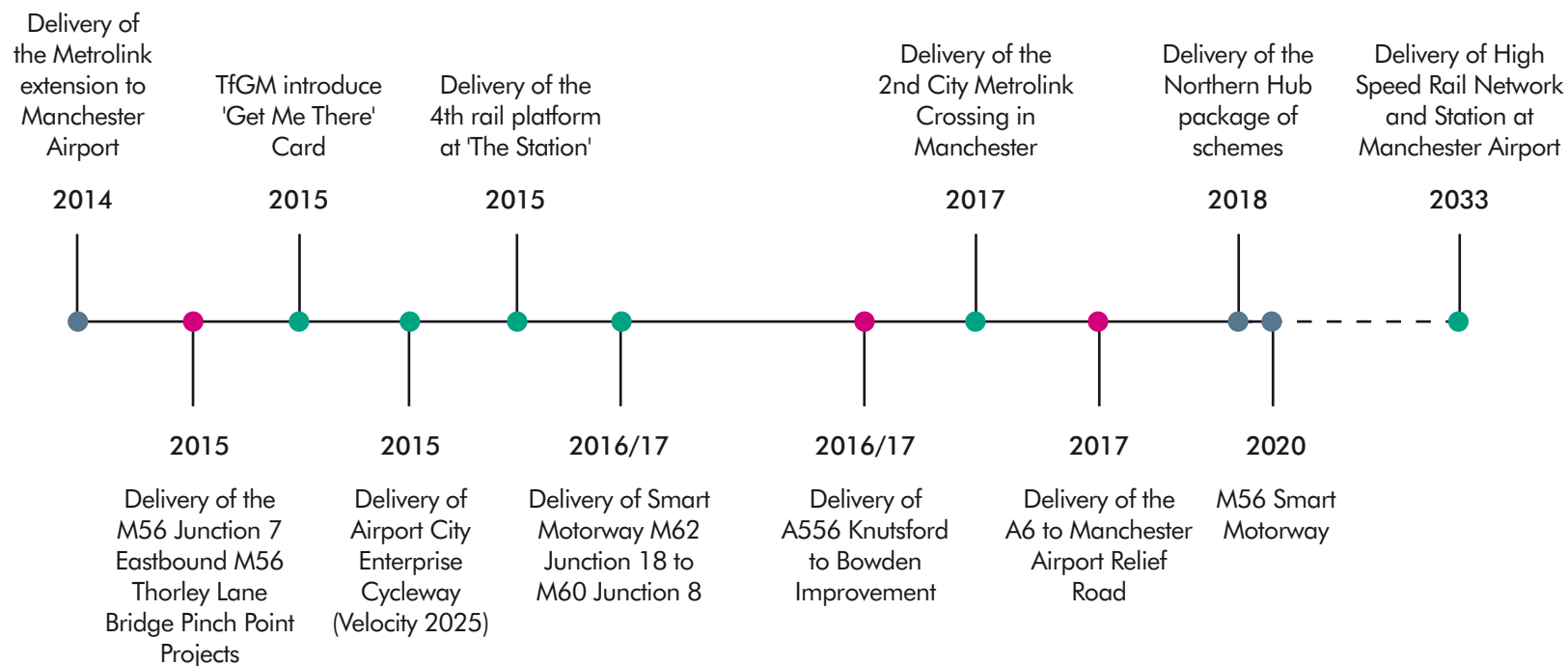


Figure 22: A Timeline of Infrastructure Delivery

## HOW TO CONTACT US

The Sustainable Development Plan is an important document for Manchester Airport. It helps set out what our aspirations are for Manchester Airport. There are many stakeholders who have an interest in the airport and the views and comments from Government, Local Authorities, neighbours, the business community and customers are an important part of the planning process. We are committed to be open in sharing the vision for Manchester Airport and the local area. The plan looks to where possible, reflect local views and ideas.

Neighbours, stakeholders and a wide range of organisations in the region were consulted in 2015 to obtain their views. Where possible these comments have been incorporated into the final set of Sustainable Development plan documents. We will monitor our progress and will carry out a full review of our Plan every 5 years.

To obtain copies of the Sustainable Development Plan or to contact the team:

Visit: [www.manchesterairport.co.uk/developmentplan](http://www.manchesterairport.co.uk/developmentplan)

Write: **Manchester Airport  
Planning  
Olympic House  
Manchester Airport  
Manchester  
M90 1QX**

email: [developmentplan@manairport.co.uk](mailto:developmentplan@manairport.co.uk)  
or  
[planning@magairports.com](mailto:planning@magairports.com)

