

London City Airport Surface Access Strategy Review 2022



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1 Introduction and Context

Context

- 1.1 Steer was appointed by London City Airport Ltd to undertake a review of the airport-wide Airport Surface Access Strategy (ASAS).
- 1.2 Although not a statutory document, an ASAS is required under the Airports National Policy Statement (NPS). The NPS requires airport promoters to produce an ASAS in conjunction with its Airport Transport Forum (ATF), as per criteria set out in the Government's Aviation Policy Framework 2013.
- 1.3 In broad terms, the ASAS contains a set of targets aimed at increasing the use of sustainable transport by staff and passengers as the airport grows, and as London's Royal Docks and wider east London area develops. It seeks to improve accessibility to public transport, both physical infrastructure and information, reduce emissions and promote sustainable transport. The targets in the ASAS reflect local accessibility to public and sustainable transport and delivery of improved and new sustainable transport infrastructure and services in the local and wider area, which requires collaborative working with relevant stakeholders, e.g., Transport for London (TfL), the London Borough of Newham (LBN), and the Greater London Authority (GLA).
- [Airport Surface Access Strategy 2017-2025](#)
- 1.4 LCY's ASAS 2017-2025 is a strategic document presenting its objectives for facilitating sustainable surface transport for staff, passengers and servicing vehicles.
- 1.5 The ASAS is split into the following sections:
- **Our vision:** presenting the vision for the airport in terms of sustainability
 - **The airport:** sets of the current context of the airport
 - **Passenger and staff travel:** presents the results of the 2016 travel surveys
 - **Setting the right strategy:** presents a set of targets for 2025 and the priorities underlying them
 - **Delivering the strategy:** conveys the method by which the strategy will be realised.

This review

- 1.6 This review of the existing ASAS has several objectives, including:
- Setting out progress to date, presenting insights developed from the analysis of the recent staff and passenger travel surveys
 - Present the impact of the COVID-19 pandemic on travel patterns and priorities
 - A forward look towards the end of the strategy period (2025)

Structure of this report

- 1.7 The ASAS review will be structured in the following way:
1. **Introduction and context:** this section, presenting what this review seeks to achieve
 2. **The Airport:** reflecting on the baseline passenger and staff mode shares presented within the existing ASAS, the impact of the COVID-19 pandemic and an outline of the CADP1 Travel Plan provision
 3. **Passenger and staff travel:** comparing recent travel surveys with those presented within the existing ASAS
 4. **Progress in delivering the strategy:** reflects the measures presented within the existing ASAS, presenting what has been delivered, alongside their achievements, evaluating what is yet to be delivered within the scope of the existing ASAS and the focus to 2025.

2 The Airport

- 2.1 London City Airport (LCY) is a regional airport located in the Royal Docks within the London Borough of Newham (LBN), approximately 6 miles east of the City of London, and 3 miles east of Canary Wharf.
- 2.2 In 2021 714,000 passengers used LCY, down from a total 5.1 million in 2019 and there was a total of 14,000 air transport movements (ATMs), down from 83,000 in 2019. These lower numbers for passengers and ATMs were due to the COVID-19 pandemic. By the end of 2022 passenger numbers are expected to reach approximately 3 million, showing recovery since the COVID-19 restrictions were lifted in February 2022.
- 2.3 At the end of 2021 1,532 people were employed at the airport. This is approximately a third less than in 2019 due to the impacts of COVID-19.

Baseline

Present Policy and Development Context

- 2.4 The existing ASAS presents several insights in relation to staff and passenger travel to the airport. The underlying data originates from staff and passenger travel surveys, both undertaken in 2016.
- 2.5 During the years following the wider context of transport has changed across national, regional, and local levels.
- 2.6 At the national level, it has been recognised that government actors will need to proactively accelerate the update of cleaner low or zero emission vehicles, whilst setting the consensus that public transport and active travel should be the priority over private vehicle usage in particularly urban and semi-urban contexts.
- 2.7 At the regional level the Mayor's Transport Strategy was adopted in 2018. In general, the wider ambition focused on the promotion of clean, sustainable travel which both facilitate the uptake of electric and other zero-emission vehicles, but prioritising enabling modal shift to public transport and active travel within the urbanised context of London. LBN's target is to achieve 83% of people walking, cycling and using public transport by 2041.
- 2.8 The Elizabeth line has also been delivered and is operational between Reading and Heathrow to the west to Shenfield and Abbey Wood in the east, with services calling at Custom House, 2.2km from the airport. The airport can be accessed from Custom House via the 474-bus route (8 minutes journey).
- 2.9 On a more local level LBN has demonstrated its commitment to sustainable travel through the adoption of its Sustainable Local Transport Plan 2021, which makes several funding commitments including Low Traffic Neighbourhoods, improvements to existing walking & cycling routes, rollout of cycle hire stations and the continuing of free cycle training for adults living, working, or studying in the borough.
- 2.10 Finally, continued development across the Royal Docks provides the opportunity to fund and implement improvements to transport infrastructure, to the benefit of LCY.

Impact of the COVID-19 pandemic

- 2.11 The COVID-19 pandemic impacted the airline industry significantly due to the restrictions imposed on travel. In the UK, Government restrictions started in March 2020 and ended in February 2022. At the beginning of the pandemic, when the UK was in lockdown, the airport

closed for 3 months until June 2020 and thereafter operated at a reduced capacity due to the variable travel restrictions, ongoing lockdowns, advice to socially distance and to stay at home where possible.

Passengers

- 2.12 The pandemic resulted in a reduction of passenger numbers from 5.1 million in 2019 to 714,000 in 2021. By the end of 2022 passenger numbers are expected to reach approximately 3 million, showing recovery since restrictions were lifted.

Staff

- 2.13 At the end of 2021 1,532 people were employed at the airport. This is about a third less than at the end of 2019. Many of the staff employed at this time were on the Government's furlough scheme and did not travel to the airport until the scheme ended in September 2021. Since returning to work more staff are also choosing to work from home more.

City Airport Development Plan (CADP1)

- 2.14 As part of the CADP1 planning application, a Travel Plan covering passenger and staff travel was prepared and submitted to LBN in 2019. It was structured as follows:

Site context –surface transport operations at the airport in 2019

Current measures –existing sustainable travel initiatives in place

Staff mode shares – home locations, shift patterns and results of travel surveys

Passenger mode shares – arrival patterns, mode shares and results of travel surveys

Objectives – outlining the six priority areas from the surface access strategy of which the travel plan will seek to address

Mode share targets – both staff and passengers

Measures to achieve targets – timescales, alongside infrastructure, organisational and communication requirements

Travel plan management – including the allocation of a travel plan coordinator

Travel plan monitoring – interim reporting and updates at ATF meetings

- 2.15 The 2019 Travel Plan covered the period 2019-2022 and a replacement Travel Plan, covering the period 2023-2025, has been submitted to LBN for approval. The 2022 Travel Plan will cover the remaining period of the current ASAS and will be subject to annual reporting and review.

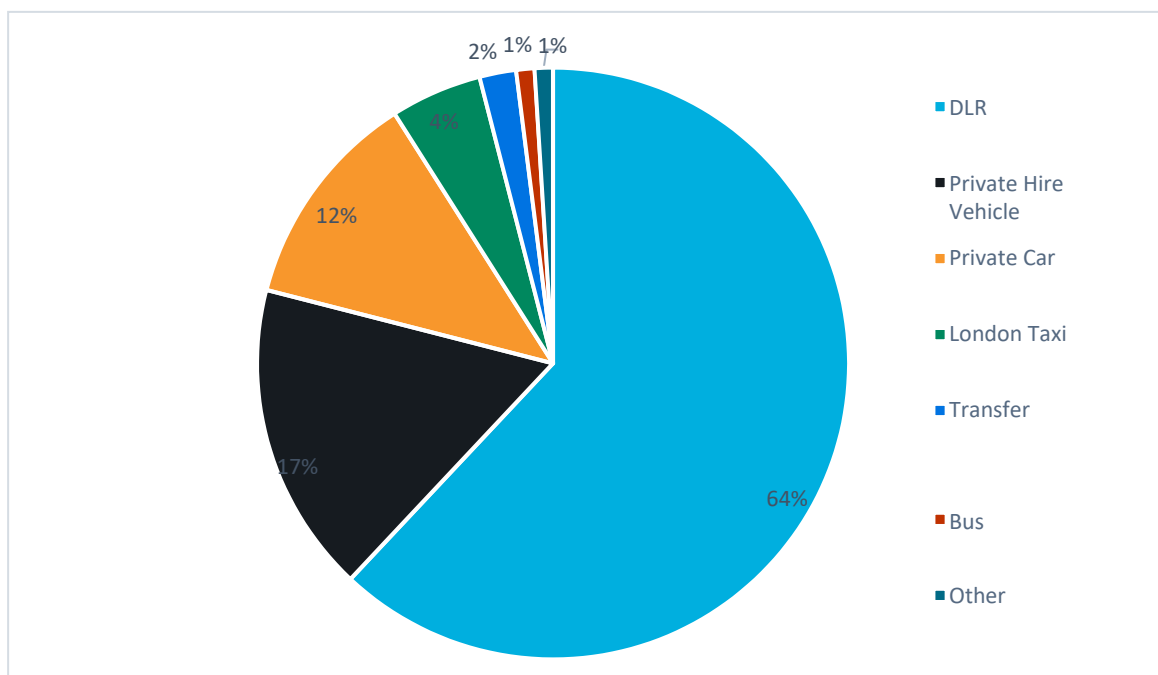
3 Passenger and Staff Travel

- 3.1 There have been several passenger and staff travel surveys undertaken since the adoption of the existing ASAS in 2017. This section will subsequently compare the results of recent travel surveys for passengers and staff to those presented within the existing ASAS.

Passengers

- 3.2 In 2016, the airport recorded a total of 4.5 million passengers served, which rose to 5.1 million in 2019, but dropped to 714,000 in 2021.
- 3.3 The existing ASAS presents passenger travel data from 2016. This data is shown in Figure 3.1.

Figure 3.1: Passenger Travel by Mode (2016 ASAS)



- 3.4 Public transport constitutes just under two thirds, and private hire and London Taxi constitutes just under a quarter of the total mode share. Private car and other minor modes comprise the remainder.
- 3.5 The existing ASAS demonstrates the strength of LCY's siting within an urbanised and well-connected location, in comparison to other airports in England. LCY has the smallest private vehicle mode share of any London airport, achieving better results compared to either London Heathrow or Gatwick.
- 3.6 Furthermore, the scale of LCY minimises surface journey times at airport, with the lowest reported for both business and leisure flights, in comparison to all other London airports.
- 3.7 Passenger mode shares have been presented in sequential years to demonstrate how they have changed through the years. These are presented in Table 3.1.

Table 3.1: Passenger travel survey results

Mode	Passenger travel survey results (%)			
	2016	2018	2019	2021
DLR	64%	64%	64%	41%
Bus	1%	1%	1%	0%
Walk	<1%	0%	0%	0%
Cycle	<1%	0%	0%	0%
London Taxi	4%	4%	8%	13%
Mini Cab / Ride Sharing Services (i.e., Uber)	18%	18%	15%	31%
Car	12%	12%	9%	13%
Other	<1%	1%	3%	2%

- 3.12 Passenger surveyed mode shares between 2016-2019 remained largely static, with the greatest difference seeing an increase in the London Taxi mode share. The 2021 passenger mode share saw a very large shift away from DLR, in favour of London Taxi and Mini cab / Ride sharing services. There was also a 4% increase in use of the private car. Full survey results for 2022 have not yet been completed but interim results show reductions in both private car, mini-cab/ride sharing and London Taxi use and an increase in DLR, bus and walking since 2021.
- 3.13 At the time of the 2021 survey, passengers are considered to have chosen to avoid public transport in favour of taxis given Government advice at that time to avoid public transport and to socially distance. As Government restrictions have lifted the perceived risk of COVID-19 transmission is a challenge of improving on previous years public transport mode shares.

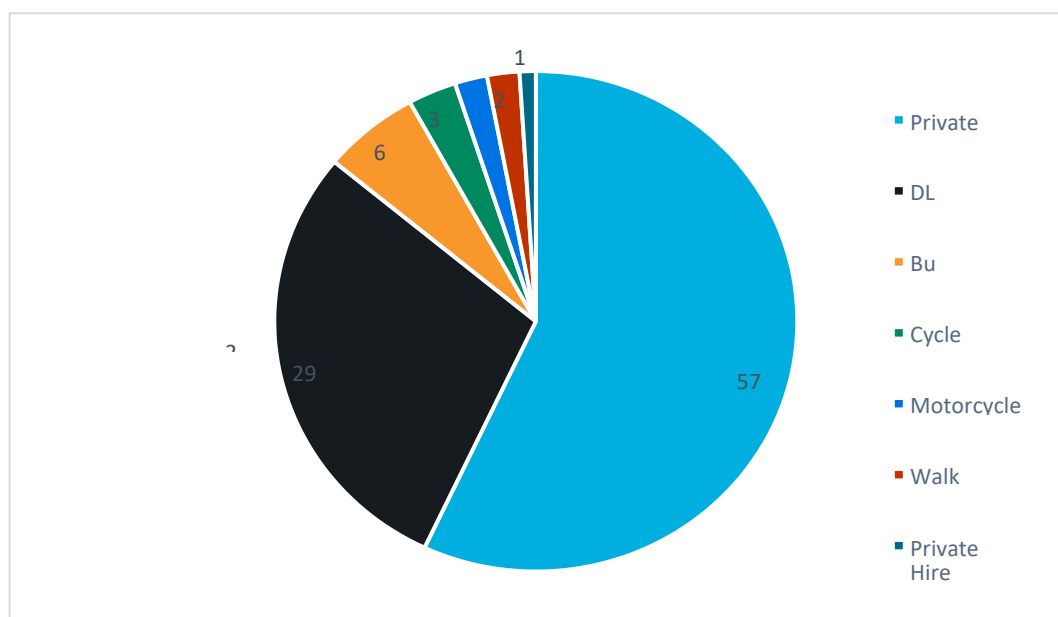
Staff

Staff

- 3.14 In 2016, the airport recorded employing 2,181 on site, equating to 1,951 FTE jobs, across LCY itself, airlines, and other supporting businesses. In 2021 staffing levels were less than this, at 1,532.
- 3.15 The existing ASAS presents the results of the annual 2016 staff travel survey, reported to have a 20% response rate. Key insights on staff reported at the time include:
- 28% living in Newham
 - 65% living in the local area¹
 - 37% of staff start work before 06:00
- 3.16 Figure 3.2 presents the staff mode share originating from the 2016 staff travel survey.

¹ The 2017-2025 ASAS advises 'local area' in the context of the 2016 staff survey includes areas within E, RM and SE postcodes.

Figure 3.2: Staff Travel by Mode (2016 Annual Survey)



3.17 The 2016 staff travel survey determined that private car constitutes over half, public transport just over a third and walk and cycle 5% of the total mode share.

3.18 The survey identified the challenge of enabling sustainable travel for staff members that had early start times, due to the unavailability of public transport at those times (due to timetabling), and car journeys were quick due to generally lower levels of congestion.

3.19 The number of staff that lived in the local area showed there was opportunity to shift journeys away from the private car, where public transport provision is adequate.

3.20 Staff mode share has been presented in sequential years to demonstrate changes through the years between 2016 and 2022.

Table 3.2: Staff travel survey results

Mode	Staff travel survey results (%)		
	2016	2019	2022
DLR/Train/Tube	29%	27%	27%
Bus	6%	7%	6%
Walk	2%	3%	4%
Cycle	3%	3%	3%
London Taxi / Mini Cab	1%	0%	0%
Car	57%	56%	57%
Car with Passenger	1%	2%	1%
Motorcycle	1%	1%	1%
Other	<1%	1%	1%

3.21 Staff mode share between 2016 and 2022 remained largely static, with no change to the car driver mode share, a minor decrease for DLR/Train/Tube and corresponding small increases for walking. There were slight improvements in sustainable transport use between 2016 and 2019, potentially as a result of the introduction of the 2019 Travel Plan and implementation of its initiatives and measures, which were subsequently impacted by the pandemic. Whilst single occupancy car use did not change between 2016 and 2022 it did not increase.

4 Progress in delivering the strategy

Mode share targets

- 4.1 The mode share targets contained within the ASAS 2017 to 2025 comprise the following by 2025:
- 75% of passengers using sustainable public transport
 - Fewer than 40% of staff travelling by single occupancy car trips
- 4.2 These targets were set in the context of the airports' operations and CADP1 development and did not anticipate the impacts of global pandemic caused by COVID-19. Nonetheless, progress has and will continue to made towards achieving these targets and these are detailed in Tables 4.1 and 4.2.
- 4.3 More detailed information is provided in the airports 2019-2022 and proposed 2023-2025 Travel Plans. For passengers, the targets in both Travel Plans is to achieve 75% of passengers using public and sustainable transport by 2025. For staff, the 2023-2025 Travel Plan target has been revised to fewer than 48% of staff travelling by single occupancy car trips by 2025 to reflect the disruption caused by the pandemic in implementing the staff specific initiatives.

Evaluating existing priorities

- 4.4 The existing ASAS presents six key priorities for surface transport at LCY that would be used to underpin the 2025 targets. These priorities have been evaluated and are presented in Table 4.1.

Table 4.1: Key priorities – achievements and work-in-progress / focus to 2025

Priority	Achievements	Work-in-progress / focus to 2025
1. Closing the information gap Making the first journey as easy as the hundredth: <ul style="list-style-type: none"> • <i>Providing information that instils confidence before and during each trip.</i> • <i>Streamlining passenger decision points to remove doubt and delay.</i> 	<ul style="list-style-type: none"> ✓ Passenger information desk is well-used, with employees providing high-quality information ✓ Wayfinding and signage ✓ LCY website ✓ Forecourt Marshalls help with directions and assistance 	<ul style="list-style-type: none"> ✎ Passenger experience regarding purchasing public transport tickets ✎ Improve wayfinding and signage ✎ Improve information on LCY website
2. Offering the right travel services Providing passengers and staff with the travel service they need at the times they need to travel, reinforcing the role of the Airport as an important travel hub for London. <ul style="list-style-type: none"> • <i>Championing the Airport requirements within future infrastructure and service debates.</i> 	<ul style="list-style-type: none"> ✓ S106 contributions to TfL towards funding new DLR stock and increased staff at the London City Airport DLR Station ✓ Continued liaison with TfL and DLR regarding public transport provision at LCY, particularly earlier first DLR services ✓ Discussions with TfL with regards to improving connectivity between Elizabeth line Custom House station and LCY ✓ LCY website 	<ul style="list-style-type: none"> ✎ Improving passenger information in regard to purchasing public transport tickets ✎ Ongoing liaison with TfL and DLR to improve public transport services to LCY ✎ Improve information on LCY website

Priority	Achievements	Work-in-progress / focus to 2025
3. Equality of Access Improving access for all passengers by enhancing step-free access, ensuring mobility friendly services are easily accessible, improving way-finding and providing improved passenger assistance. This will be particularly important during construction of CADP1.	<ul style="list-style-type: none"> ✓ Improvements to temporary forecourt ✓ 30 minutes free parking for blue badge holders ✓ London Taxi rank positioned close to terminal entrance ✓ Wayfinding and signage improvements ✓ Forecourt Marshalls help with directions and assistance ✓ Improved passenger assistance ✓ LCY website 	<ul style="list-style-type: none"> ✎ Wayfinding and signage providing high-quality routes from gates to public transport options ✎ Liaison with TfL regarding any staff or passenger issues with access at connecting stations or use of services
4. Facilitating Healthy Streets Recognising the role of the Airport in the local area. <ul style="list-style-type: none"> • <i>Supporting local cycling and walking improvements</i> • <i>Promoting them to airport employees and local businesses.</i> 	<ul style="list-style-type: none"> ✓ S106 contributions to LBN for walking and cycling improvements in the local area ✓ Wayfinding and signage improvements ✓ Increased staff cycle parking ✓ Installation of 6 passenger EV charging points (2 rapid) ✓ Installation of 1 rapid EV charging point for London Taxis ✓ Installation of 6 staff EV charging points ✓ Staff cycle to work scheme ✓ Staff loan scheme for purchasing public transport season tickets ✓ Staff salary sacrifice scheme to purchase an electric car ✓ Staff Liftshare scheme ✓ Information on sustainable access options in staff orientation ✓ Communications and marketing to staff and passengers 	<ul style="list-style-type: none"> ✎ Improved marketing and communications to improve knowledge to staff and passengers ✎ Staff travel personal travel plans ✎ Increase visibility of Liftshare in staff car parks and increase provision of Liftshare parking bays ✎ Investigate improvements to staff cycle scheme ✎ Provision of cycle hire schemes for staff and passengers with LBN and Brompton Bike Hire ✎ Improve welcome packs & staff orientations, in staff room noticeboards, intranet portals/mobile apps
5. Offering Low Carbon Alternatives To monitor, track and reduce carbon emissions from all airport related surface access transport movements, including airport related servicing and delivery movements.	<ul style="list-style-type: none"> ✓ Undertaken as part of LCY's Air Quality Monitoring and Management Strategies ✓ Achieved 4+ Transition accreditation by the Airport's Council International (the highest accreditation) 	<ul style="list-style-type: none"> ✎ Monitoring and review are ongoing

Priority	Achievements	Work-in-progress / focus to 2025
6. A Collaborative Approach Working with partners to increase the use and availability of sustainable travel. <i>Engaging stakeholders through the Airport Transport Forum and Staff Committee.</i>	<ul style="list-style-type: none"> ✓ Engagement with collaborative stakeholders continues at ATF meetings, airport Employer Forums and communications with staff. Additionally, at regular meetings with LBN, at meetings with TfL, GLA and DLR and participation in consultation events. ✓ LCY supported by external consultants: Liftshare; Mobilityways and Steer. 	<ul style="list-style-type: none"> ✎ Improved engagement with all stakeholders following COVID-19

4.5 In addition to these six key priorities, there are several other modal-specific priorities in relation to surface travel at LCY, as detailed within the existing ASAS. These are presented in Table 4.2 with an outline of the work-in-progress and focus to 2025.

Table 4.2: Other modal-specific priorities and work-in-progress/focus to 2025

Mode	ASAS priority	Work-in-progress/focus to 2025
DLR	<ul style="list-style-type: none"> Working with DLR Ltd to maintain and improve station and concourse facilities Quantifying demand for additional early morning services Increasing use of DLR 	<ul style="list-style-type: none"> Continue engagement with LBN, TfL and DLR to continue improvements to DLR early-AM service patterns, wayfinding & signage, timetabling and investments in rolling stock
Rail	<ul style="list-style-type: none"> To support the Elizabeth line and the valuable journey time savings and development opportunities it will bring Ensure airport related signage and wayfinding is aligned across the Elizabeth line Consideration of a dedicated Airport shuttle to Custom House Pursuing the case for a new Elizabeth line station at Silvertown 	<ul style="list-style-type: none"> Continue to engage with TfL to support and improve bus services connecting LCY to Custom House station and to improve signage to LCY and visa versa Continue to engage with TfL and other stakeholders on the feasibility of a new Elizabeth line station at Silvertown
Bus	<ul style="list-style-type: none"> Providing an improved passenger experience as part of the enhanced forecourt development: the enhanced forecourt will be delivered as part of CADP1, the construction of which is temporarily suspended due to COVID-19. Enhanced bus facilities have been delivered in the interim as part of temporary improvements to the terminal forecourt. Working with bus operators to promote available services to airport staff and passengers (particularly in the baggage hall) 	<ul style="list-style-type: none"> Continue to liaise with LBN and TfL regarding future bus service provision in the wider area
Walk	<ul style="list-style-type: none"> Offering improved facilities on-airport to encourage more passengers and staff to cycle such as additional secure cycle parking 	<ul style="list-style-type: none"> Continue engagement with LBN regarding walking improvements, such as pedestrian priority at junctions

Mode	ASAS priority	Work-in-progress/focus to 2025
Cycle	<p>stands: an enhanced forecourt will be delivered as part of CADP1, the construction of which is temporarily suspended due to COVID-19. Enhanced cycle facilities have been delivered in the interim as part of temporary improvements.</p> <ul style="list-style-type: none"> Improving wayfinding and signage for cyclists in the local area: LCY has made a S106 contribution to LBN to include for this. The programme of delivery has been delayed by COVID-19. 	<p>and improved wayfinding and signage</p> <ul style="list-style-type: none"> Continue engagement with LBN and TfL regarding future cycling infrastructure improvements Continue engagement with LBN, TfL and cycle hire operators regarding future cycle hire facilities Continued commitment and marketing of staff cycle schemes
London Taxi Mini Cab & Ride Sharing Services	<ul style="list-style-type: none"> Developing a Taxi Management Plan to accommodate future growth, including a combined taxi feeder management system and forecourt with capacity for large number of vehicles; electric charging points for London Taxis; and working closely with the local communities to manage local impacts. This will be delivered through the Taxi Management Plan approved as part of CADP1 in 2018, the construction of which is temporarily suspended due to COVID-19. Enhanced taxi management facilities have been delivered in the interim as part of temporary improvements. 	<ul style="list-style-type: none"> London Taxis will continue to be managed in liaison with the Taxi Co-ordinator Continue to monitor the use of the rapid EV charger for London Taxis Additional EV chargers will be installed depending on demand Taxi Marshalls will continue to provide assistance in the terminal forecourt Any local issues with taxis can continue to be raised via the ATF.
Car (parking)	<ul style="list-style-type: none"> Creating 3 new passenger car parks and a dedicated staff car parking facility: these car parks will be delivered as part of CADP1, the construction of which is temporarily suspended due to COVID-19 Increasing airport car parking capacity to just over 1,250 spaces; these car parks will be delivered as part of CADP1, the construction of which is temporarily suspended due to COVID-19. Current parking spaces are below these levels. Introducing electric charging points in passenger and staff car parks: 6 passenger and 6 staff EV charging points have been provided to date in temporary locations pending completion of the CADP1 car parking and EV charging infrastructure. 	<ul style="list-style-type: none"> Continue to monitor the use of the existing EV charging points and increase depending on demand Increase the number of car sharing spaces Consider increasing current car parking charges for passengers to discourage private car use
Car (road network)	<ul style="list-style-type: none"> A new forecourt interchange, increasing car drop-off/pick-up capacity from 8 to 48: this increase in capacity will be delivered as part of CADP1, the construction of which is temporarily suspended due to COVID-19. In the interim temporary improvements have been made to increase the capacity of the pickup area to 25-30 cars. 	<ul style="list-style-type: none"> Maintain charging for passenger pick up (£3.80 0-10 minutes, £8.50 10-20 minutes) with a maximum stay of 20 minutes (an additional £5 is charged per every 5 minutes after the maximum 20 minutes) and consider increasing current

Mode	ASAS priority	Work-in-progress/focus to 2025
		charges to discourage private car and mini cab use
River Thames	<ul style="list-style-type: none"> Investigating the attractiveness of a premium services for air passengers 	<ul style="list-style-type: none"> Promote the use of access via the river Thames to passengers and staff Continue monitoring
River crossings	<ul style="list-style-type: none"> Understanding the benefit that additional crossings like Gallions Reach and Thamesmead will bring to the airport and the wider London Royal Docks 	<ul style="list-style-type: none"> Promote the use of access via the river Thames to passengers and staff Evaluate how many passengers and staff have the potential to use River Crossing services Continue monitoring

- 4.6 The airport Travel Plans build upon these priorities to support sustainable travel.
- 4.7 The ATF is currently in place with meetings scheduled to discuss opportunities and constraints regarding travel at the airport with the relevant stakeholders.
- 4.8 Staff travel surveys are to be undertaken annually until 2025 (to monitor progress following the lifting of COVID-19 restrictions). Passenger surveys will continue to be undertaken throughout the year.

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