

What Matters Seminar

Gatwick Matters



**LONDON
GATWICK**



LONDON GATWICK MATTERS

Manor Royal Matters 2023

8 November 2023



LONDON GATWICK

POWERED BY   GLOBAL INFRASTRUCTURE PARTNERS

Why does London Gatwick matter?



London Gatwick is the second largest airport in the UK, and once again, one of Europe's top 10 airports

2023



c 40m
passengers

(CY 2019: 46.6m)



c 5.3m
long-haul
passengers

(CY 2019: 9.0m)



c 245k
movements

(CY 2019: 280k)



85%
average
load factor

(CY 2019: 86.3%)



47
airlines

(CY 2019: 54)

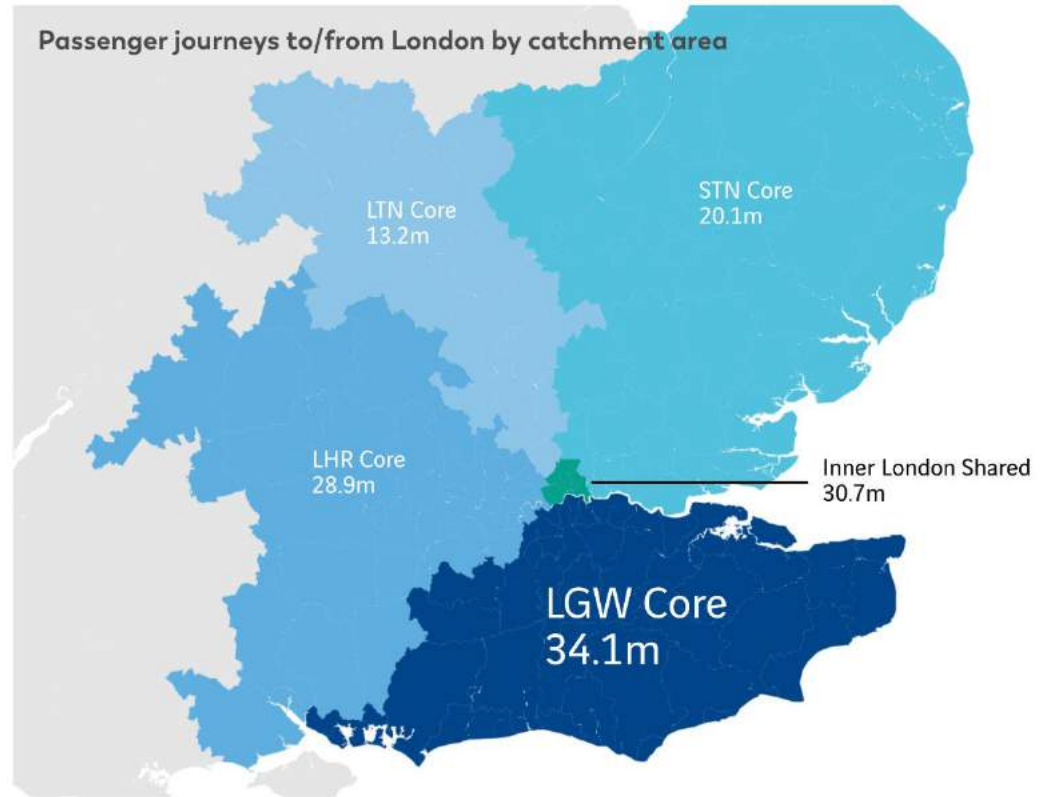


220
destinations

(CY 2019: +250)

Note: CY = Calendar Year

London Gatwick has London's largest passenger catchment area, in the heart of the most prosperous, densely populated and best-connected region of the UK



Airline Route Development



London Gatwick has a diverse portfolio of carriers, including many of the world's largest airlines

Full service carriers Announced



Low cost & Hybrid carriers



Leisure carriers

Regional carriers



Notes : Hybrid indicates low-cost airline that also offers full service features

Wide choice of short-haul and domestic

New highlights



Adding Porto, Portugal, Algiers, Algeria, Sharm el-Sheikh, Egypt and Innsbruck, Austria to their winter programme



Will add Marsa Alam, Egypt which will be a new destination for London Gatwick



Adding Akureyri in Iceland to their winter destinations from London Gatwick

Gatwick serves 170 short-haul and domestic destinations, with new routes continually being added



AIR ALGERIE

New airline flying to Algiers, Algeria twice a week



New services to Prague, Czech Republic and Hurghada, Egypt this winter



New airline to London Gatwick flying to Strasbourg, France twice-weekly

Rebuilding long-haul

Highlights



Air India added four new routes to India; Ahmedabad, Amritsar, Cochin and Goa all three times weekly



Ethiopian will launch a new route to Addis Ababa in November



Daily flight to Mauritius launches this winter



BRITISH AIRWAYS

Adding Accra, Ghana which is a new destination to London Gatwick



First every route to Saudi Arabia, with Saudia to Jeddah



New destinations to Los Angeles, San Francisco, Washington, Boston Miami this summer. New winter services to Montego Bay, Jamaica, and Bridgetown, Barbados

Gatwick will have 48 long-haul destinations for customers to choose from



Delta introduced a daily connection to New York JFK



Air China and China Eastern recommenced their Shanghai services

London Gatwick
currently flies to 218
destinations



Future Investment



Investing for the future

Capital investment ramp-up, circa **£160m in 2023**

Major projects :

- Rail station completion,
- NT IDL refurbishment,
- Pier 6 extension design,
- New rapid exit taxiway,
- Electric charging forecourt,
- Northern Runway DCO submission

To come: many projects delivering our sustainability ambitions (e.g. heating, cooling, renewables) with a **further investment of circa £250m up to 2030**



Our Northern Runway Project

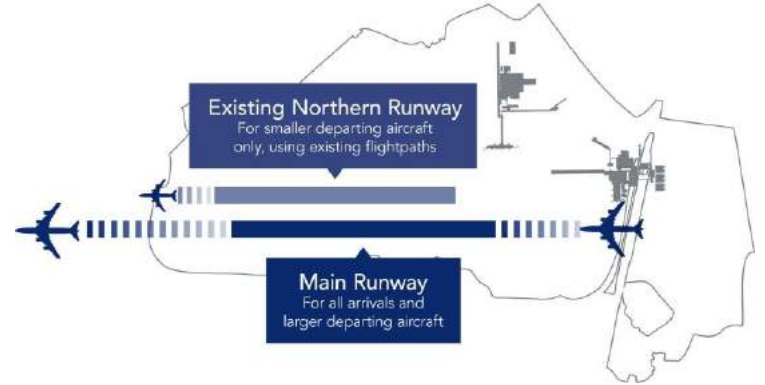
Bringing the Northern Runway into routine use would offer a **low-impact** way of unlocking **new capacity** and **increased resilience** from the airport's existing infrastructure.

The Northern Runway would be used by **smaller departing aircraft only**, using existing flightpaths.

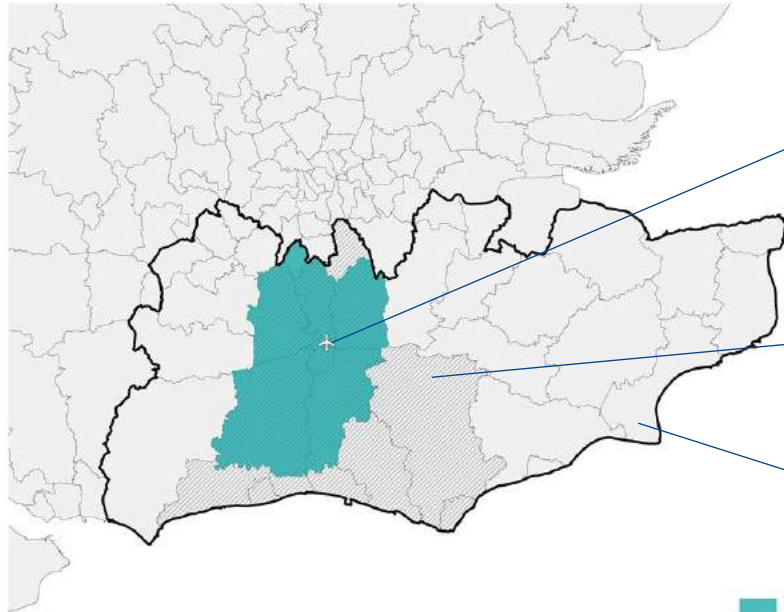
A dual runway operation would **increase capacity**:

- 75.6 million passengers per year by 2038
- 382k flights per year

No airspace changes are required to facilitate this, and most construction would take place within the current airport boundary.



NRP local economic impact (2032 estimates)



Gatwick Diamond

- 6,500 jobs and £471m GVA

Labour Market Area

- 9,600 jobs and £695m GVA

Six Authorities Area

- 14,000 jobs and £1bn GVA



UK national level
• 16,800 jobs and £1.2bn GVA

The Development Consent Order timeline



Sustainable Growth:

Our Second Decade of Change



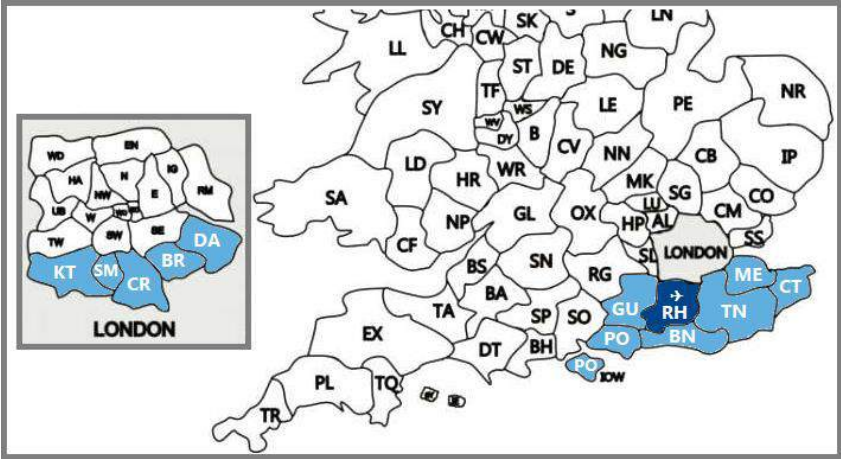
Second Decade of Change and 2030 goals

Ten Topics across Three Themes:

- Support our people and invest in our local communities.
- Continue our transition to Net Zero and improve air quality.
- Reduce our impact on the local environment and waste.



Local Economy



Economic contribution to Crawley

London Gatwick supports significant economic activity in Crawley:

- 2021: £271m in GVA, supporting over 5,000 jobs from direct and supply chain related activity.
- This is expected to return, and surpass, pre-pandemic levels where in 2019 London Gatwick contributed £749m and supported around 12,000 jobs.
- 2023: 6,282 Crawley residents worked on London Gatwick campus.



Local Economy commitments

Our goal is to be a partner and advocate for a thriving resilient economy and contribute to local and regional workforce skills partnerships and initiatives.

Our commitments:

- Support local business, economic growth and innovation
- Provide job opportunities for local people
- Support initiatives to upskill local people



Local Economy roadmap

By 2030:

- A minimum of 10% of Gatwick Airport Limited's total spend will be with local suppliers, with a stretch target of 20%
- A minimum of 25% of Gatwick Airport Limited's total spend will be with regional suppliers, with a stretch target of 35%
- Gatwick will employ a minimum of 55% of the total GAL workforce from the local area, with a stretch target of 65%
- Gatwick will contribute a minimum of 35 hours of specialist colleagues (including Executive and Senior Management) to support local workforce skills partnerships and initiatives per year, with a stretch target of 70 hours

1. Local Economy

Be a partner and advocate for a thriving resilient economy and contribute to local and regional workforce skills partnerships and initiatives.

Through

- Supporting opportunities for local and regional businesses.
- Supporting more job opportunities for local people.

Gatwick recognises the Redhill/Crawley postcode as local, and those illustrated in the map as "regional".

By 2030:

- A minimum of 10% of Gatwick's total annual spend will be with local suppliers, with a stretch target of 20%.
- A minimum of 25% of Gatwick's total annual spend will be with regional suppliers, with a stretch target of 30%.
- Gatwick will employ a minimum of 55% of the total Gatwick workforce from the local area, with a stretch target of 65%.
- Gatwick will contribute a minimum of 35 hours of specialist colleagues (including Executive and Senior Management) to support local workforce skills partnerships and initiatives per year, with a stretch target of 70 hours.

www.gatwickairport.com

www.gatwickairport.com/sustainability

y

Procurement

London Gatwick has partnered with data, insight and analytics platform mnAi, based in Crawley:

- The platform will enable the airport to **identify locally-based businesses** from which requests for proposals and quotes can be sourced for a range of key projects, as well as to supply goods and services.

Local SMEs in the RH postcode area can **register their interest to provide Gatwick and its supply chain with a range of goods and services**, and sign up to future newsletters, via a simple form on the airport's website.

www.gatwickairport.com/business/work-with-us



Other initiatives to support the local economy

- London Gatwick Economic Summit
- Airport Economic Zone concept development
- Gatwick Diamond Initiative Strategic Partnership
- Gateway Gatwick / promotion of the regional visitor economy
- Sussex & Surrey Institute of Technology
- Crawley Innovation Centre





THANK YOU

Richard Lennard, Economic Partnerships Manager



LONDON GATWICK

POWERED BY  **VINCI** AIRPORTS  **GLOBAL**
INFRASTRUCTURE
PARTNERS

Final Plenary Session

#ManorRoyalMatters

Stay here!

1145 to 1215

Plenary

Decade of
delivery (*Film*)

Our possible
tomorrow

End & Lunch

