



ACCESS GATWICK

Our Surface Access Strategy 2012-2030

YOUR LONDON AIRPORT
Gatwick





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OUR VISION

In 2012, nearly 34 million passengers will use Gatwick as a gateway to the world and the UK. Alongside that, nearly 21,000 people work on the airport campus. Gatwick is the best connected London Airport with over 120 direct rail services to stations in the South East. Over 13 million people travel through the Airport railway station each year, while millions of others come by car, bus or coach on the motorway and local road network which we are fortunate to have nearby.

Looking toward the future, as we envisage Gatwick growing to 40 million passengers annually, we recognise that growth will bring great demand for accessible and reliable transport connections to and from the airport every day, every week, every year.

Surface Transport is critical for us to deliver a great airport experience now and to develop Gatwick to its fullest potential in the years ahead - that's why improving surface access is a key focus in our recently published Airport Master Plan - our vision for how we plan to grow.

I believe that surface access transport can be, and has to be, sustainable. Already the proportion of airport users utilising using public transport stands at just over 40%. This is great news - but we can do even better over the next decade and beyond.

Our vision is to:

- be the best connected and accessible UK airport, delivering integrated surface transport
- contribute to the sustainable economic growth of the local community and of the UK economy
- lead the way for best practice in Surface Access Strategies, with innovation at its core.

Surface transport options will shape airport users' travel decisions, while efficient transport links will benefit the local community and help manage Gatwick's environmental footprint. Access Gatwick - Our Airport Surface Access Strategy (ASAS) recognises this while assessing future challenges and opportunities for Gatwick as a Transport Hub, whether on rail, bus and coach services, car parking, cycling routes or travel-to-work issues.

This Airport Surface Access Strategy has been developed by the Gatwick Area Transport Forum after extensive consultation, discussion with transport professionals and local communities. The successful delivery of this Strategy will be achieved through our strengthened Surface Transport Team here at Gatwick and by all our stakeholders through the Transport Forum.

The Strategy outlines how these interests will be brought together to share best practice and, when necessary, resources to deliver effective surface access transport options that reduce emissions and enhance the travellers' experience while reinforcing Gatwick as an important transport hub.

I commend the Strategy to you.

Stewart Wingate
Chief Executive



EXECUTIVE SUMMARY

Introduction

We consider our new Strategy 'Access Gatwick' to be 'new best practice' for Airport Surface Access Strategies, where the principle objectives are to support Gatwick's ambition to be London's airport of choice and sustainable growth in the economy.

Our new Airport Surface Access Strategy (ASAS) is a fundamental and central part of our delivery toward the Government's requirement of sustainable aviation and critical to the long term success of Gatwick. The Strategy sets out our principles, goals and strategies for surface access at Gatwick and is aligned to the Airport Master Plan.

Our vision is to:

- be the best connected and accessible UK airport, delivering integrated surface transport
- contribute to the sustainable economic growth of the local community and of the UK economy
- lead the way for best practice in Surface Access Strategies, with innovation at its core.

The ASAS puts the passenger experience first, by considering how people travel and what their needs are and then looks at the transport infrastructure and services required to facilitate this. The infrastructure and services are considered within the context of Gatwick being a destination and an interchange and therefore a transport hub. Each area considered contains a set of strategic priorities and these will be used to define future initiatives, which will be detailed in a series of five year action plans. The first Surface Access Action Plan will be for the period 2013-2017 and this will replace the 2011 Action Plan. We will review the Surface Access Action Plan every three years.

To deliver our surface access vision and provide input to our ASAS, we have engaged a number of studies to inform its development, as well as a Vision Workshop in April 2012 with key stakeholders and considered the results of the Airport Master Plan consultation.

Working with the Transport Forum Steering Group we have developed the ASAS and its Strategic Priorities to deliver three key objectives. These objectives are to:

- achieve 40% public transport mode share for air passengers and staff by the time the airport reaches 40 million passengers per annum (mppa)
- identify feasible measures to achieve a stretch target of 45% public transport mode share once the 40% target at 40mppa has been achieved
- achieve a quality service rating of 4.5 (1 is lowest, 5 is the highest) for all surface access transport modes and facilities by the time the airport reaches 40mppa.

Gatwick as a Transport Hub

Within the ASAS we have set out that Gatwick acts as a transport hub being both an interchange and a final destination. There are a number of key principles of a transport hub which are to be:

- Well governed
- Knowledgeable
- Connected
- Safe and sustainable
- A place of work
- Innovation - through challenging targets

These principles form the structure of our ASAS. Taking each principle in turn we consider the current situation, the future and have set a number of strategic priorities to achieve this. These Strategic Priorities will guide the development of the Surface Transport Action Plans which will be developed to deliver our vision and objectives.

Well governed

Six key areas where the Gatwick ASAS will contribute to National and local policy are to:

- play a critical role in supporting the Government's plans for growth
- support of sub-regional development and connectivity
- align to emerging and shifting centres of connectivity in wider regions
- align to sustainability objectives
- support wider tourism strategies
- meet Government policy.

A key aspect of governance is the Gatwick Area Transport Forum which was established in 1998, as a result of a Government requirement for airports over 5mppa to have a Forum and an ASAS. This is overseen by the Forum Steering Group.

Knowledgeable

There are two key areas which we consider:

- understanding how our passengers are travelling, who they are etc. as well as volumetric data such as vehicle and passenger numbers. These are essential tools in developing our Strategy. These are analysed with our mode share and traffic models.
- Passengers planning their travel, the knowledge they require at all stages of the journey, along with their actual experience.

Our challenge is to go beyond meeting the needs of the passenger and to delight them. The challenge is embracing technology and innovation, while understanding that passengers will have different levels of ability and technology available.



Connected

We have considered the services and infrastructure required for rail, local bus and coach, car parking, drop off/pick up, taxi and car rental. For each mode we start with a view of what a future journey could look like in 2030 and then look at how we are going to achieve this.

Rail - Gatwick is London's best connected airport by rail with direct train services to over 120 rail stations. The Airport and its airlines place great emphasis and importance on rail connectivity especially the Gatwick Express, with over 35.5% of all passengers using rail (equating to over 12 million passengers per annum) of which 50% use the Gatwick Express.

In the future, for both rail infrastructure and services, quality, passenger satisfaction, accessibility and capacity will be key issues.

We believe that rail could attract a further 3% mode share if the measures in our Strategy are implemented which will contribute to the stretch target of 45% public transport mode share target once we reach 40 million passengers per annum (mppa).

Bus and Coach - Gatwick has a mature and well developed coach network which serves it well. However it may be limited in terms of serving new destinations developed and achieving growth due to the airport's excellent rail connectivity. The Bus and Coach Strategy within the ASAS sets out to: support and promote new and existing services, improve the passenger experience and facilities, enhance and expand infrastructure provision.

In the short term the development of new services to Kent and East London/Stratford services are the strongest options. For enhancing existing services the South London stops on Central London express coach services and the Sussex coastal towns express coach services look the most promising.

Local bus again shows that with a mature network, the opportunities for wholly new services are limited to potential new services around Reigate, Dorking and or Leatherhead. For existing services we need to ensure the sustainability of existing services, investigate early morning journeys on Metrobus 200, along with early morning, late evening and Sunday journeys on Metrobus 400.



Gatwick Airport also attracts a significant number (over 17,000) charter coaches each year. This is an important market and we will work with the Confederation of Passenger Transport to develop the facilities for this sector.

Along with the activities to promote sustainable transport, we believe that the measures identified for bus and coach could contribute an additional 2% to our mode share objectives to enable the airport reach its stretch mode share target of 45% beyond 40mppa.

Roads - Gatwick is a Traffic Authority and is required to manage its roads like any other Traffic Authority; which we do through the Landside Network Plan. The North Terminal Extension planning application identified a number of capacity improvements and enhancements that are required before 2020 to accommodate growth. These are at the M23 Junction 9A, North Terminal Roundabout, and Beehive Roundabout.

The National road network is critical to Gatwick. The Government and the Highways Agency have outlined a number of improvements in the National Infrastructure Plan and in other announcements, which will ensure good access to Gatwick. These include the Route Management Strategies for Strategic Routes, M25 hard shoulder running Junctions 5-7 and Free Flow Tolling for the Dartford Bridge/Tunnel.

Car Parking - We have undertaken a review of our existing Car Parking Strategy and this has confirmed the Master Plan position of a total car parking demand of approximately 34,700 parking spaces.

The strategic priorities for car parking are to deliver the best possible passenger experience and increase value and efficiency by:

- accommodating all additional airport-related car parking on-airport
- making the most efficient use of the combined on-airport car park supply
- optimising car parking locations in relation to South and North Terminal demand

- continuing 'yield management' measures to maximise use of the long stay car parking and reduce need for 'Kiss and Fly'
- applying the use of technology to enhance the passenger experience.

Car Rental - Our competitive advantage over other airports is that we have 'no bussing' for air passengers to access their rental cars. This is especially important for business passengers. We are working closely with Business Vehicle Rental Leasing Association to double the car rental mode share and to review the back-up facilities to maximise use of our land. One of the key opportunities will be for car rental to reduce passenger 'pick up/drop off' through the use of one way car rental. This will help reduce the number of pick up/drop off car trips to and from the airport by a factor of three. Our strategic priority is to deliver the best passenger experience by working with car rental operators to double the percentage of passengers using car rental.

Taxi - Our strategic priority is to deliver the best possible passenger experience by working with the on-airport taxi operator to deliver continuous improvement in customer experience and consistently achieve a 4.5 quality rating (1 lowest - 5 highest).

Drop off/pick up - This accounts for 18% of the air passenger mode share, but 40% of the surface access carbon footprint. Whilst it is considered by many the easiest way to travel to the airport, it is the least sustainable and creates most congestion. We believe we could see a 5% mode share reduction in this category as a result of this Strategy in the long term. Our strategic priorities are to increase the value and efficiency of our road network by:

- reducing the proportion and number of passengers who are dropped off/picked up by private car
- effectively manage the forecourts drop off areas to ensure efficient use of capacity for passengers arriving by car.

A place of work - Employee Travel

Our 2012 Staff travel survey has shown that 65% of staff travel to work by private car and that this percentage has not changed since 2007. In order to address this we have reviewed the staff travel activities and made a number of changes. Our strategic priorities are to increase value and efficiency by achieving a 40% public transport mode share for employees by the time the airport reaches 40mppa by:

- introducing a new Airport Travel Plan by end of 2013
- improving the attractiveness of public transport to staff by working with operators to achieve consistent smart card technology for all staff discounts.

Innovation - Through challenging objectives

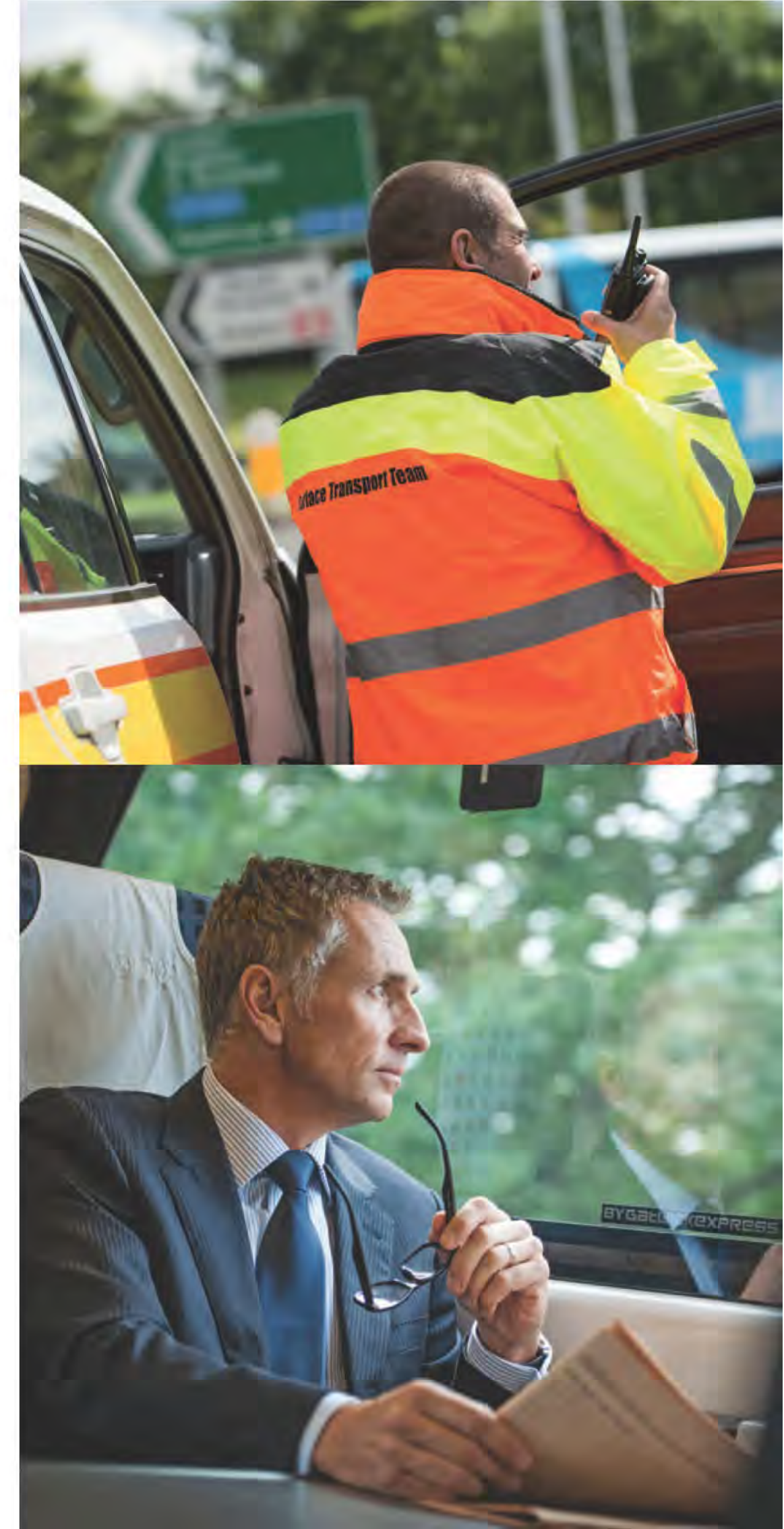
All of the strategic priorities of the ASAS contribute towards the following objectives:

- achieve 40% public transport mode share for air passengers and staff by the time the airport reaches 40mppa
- achieve a stretch target of 45% public transport mode share once the 40% target at 40mppa has been achieved
- achieve a quality service rating of 4.5 (1 is lowest, 5 is the highest) for all surface access transport modes and facilities by the time the airport reaches 40mppa.

SUMMARY

These targets represent a considerable challenge from where we are today. It means that to achieve the air passenger public transport mode share target of 40% a further 4 million passengers a year will need to use public transport. That said we believe that we can increase our public transport mode share to 45% by delivering the strategic priorities set out in this Strategy.

In delivering the ASAS and its targets we will significantly contribute to our overall ambition to 'compete to grow and become London's airport of choice'.



OUR JOURNEY INTO THE FUTURE

The world around us is continually changing and developing. Technology is one of the key drivers of this change and is improving how people can plan, book and undertake their journeys. It is also changing and improving the type of vehicles and infrastructure which are used.

As we scan the horizon to 2030, we have challenged ourselves to look forward to the future, embracing improvement, innovation and changes as a core element of our Strategy. Fundamental to this was the surface transport Vision Workshop held in April 2012.

Gatwick, along with 80 of the top UK transport professionals and key local stakeholders, created a view of what a number of journeys to the Airport may look like in 2030.

These journeys, along with emerging and future technologies, paint an exciting picture of future travel. At Gatwick, we aim to be at the heart of this change, with innovation and partnerships helping to transform travel to the airport.

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RAIL JOURNEY 2030

A foreign backpacker plans a trip to the UK as part of a tour of Europe. She wants to visit the Lake District first and makes travel arrangements before leaving Russia. She chooses to travel by train and pay at the point of use at each stage of the journey and doesn't mind about how long the journey takes.

She expects to access the information she needs along the entire journey via her smart phone, be informed of any changes or delays, and her itinerary is automatically updated for her whole journey. She wants it in her own language. At Gatwick she finds a train waiting for her at the platform, as rail companies know the exact number of arrivals at the airport and can adjust train schedules according to real-time demand.



LEFT: The ZEFIRO high speed train from Bombardier redefines rail travel and sets the standard for sustainable mobility. It ranges from a 250 kph sleeper to one of the world's fastest series-production trains at 380 kph. The innovative ECO4 technologies have reduced overall energy consumption by up to 50 per cent.

BELOW: Verge concept phone. The device incorporates a flexible OLED screen backed with a thin layer of graphene for durability and strength. The screen is made ridged with two retractable braces made from memory metal. When the user slides the two sections apart, the screen unrolls and a current flows through the memory metal to make it stiff. To retract it, a spring assist rolls up the screen and the metal relaxes back into compartments inside the device.





LEFT: Brazilian designer Dinard da Mata poses the prospect of a beautifully stunning bendy OLED device with bright, high-res image quality, PlayStation styled gaming controls and an exciting looking user interface. The Philips Fluid also sports a tiles based app menu and curved handset form.



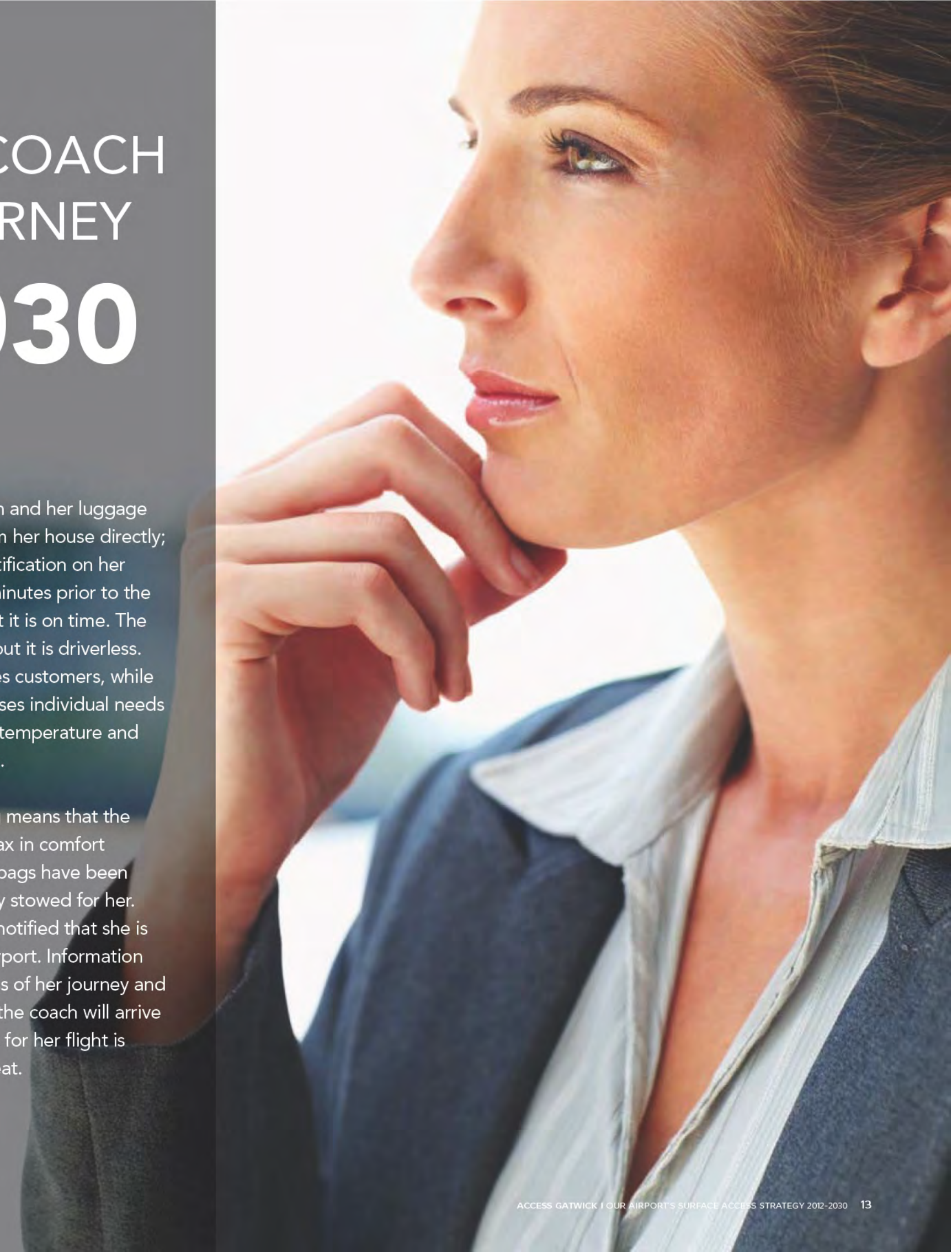
BELOW: The Toureen concept bus embraces innovation, ecology, safety, quality, strength and accessibility. Toureen features large glass windows and a sliding panoramic roof, providing more interactivity between the passenger and the environment. It also features a ramp that adjusts according to desired height for users with special needs. In addition, the concept includes electric motors within the wheels, thereby increasing the space inside the vehicle, reducing noise pollution and eliminating the emission of greenhouse gases.



BUS/COACH JOURNEY 2030

A business woman and her luggage are picked up from her house directly; she received a notification on her smart phone 15 minutes prior to the coach arriving that it is on time. The vehicle is hosted but it is driverless. The host welcomes customers, while the coach recognises individual needs such as preferred temperature and seat configuration.

Luggage handling means that the passenger can relax in comfort knowing that her bags have been safely and securely stowed for her. Her airline is also notified that she is en-route to the airport. Information about the progress of her journey and re-assurance that the coach will arrive at Gatwick in time for her flight is provided at her seat.



ROAD JOURNEY 2030

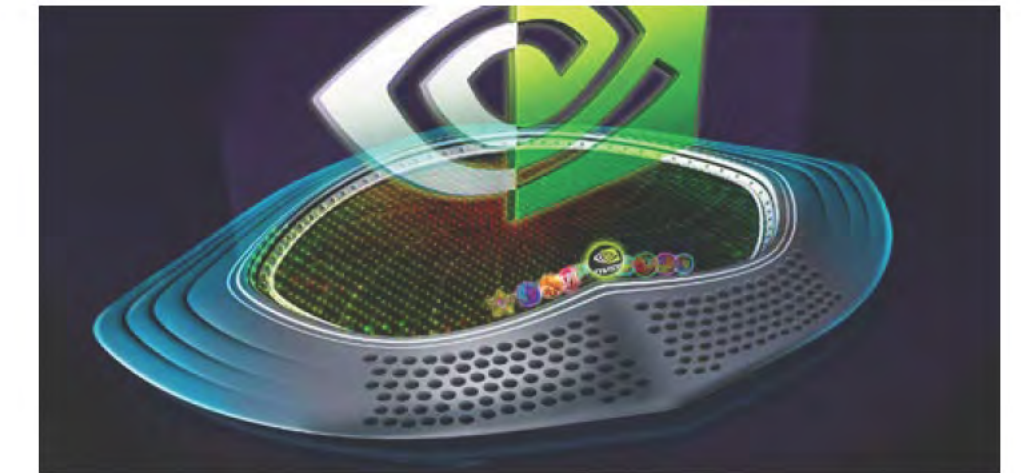
A family decide to drive to the airport in their electric car. During the drive the family are reminded of their itinerary; they are given regular updates on queue lengths and flight departure times. Infotainment and entertainment streamed to the vehicle are themed to relate to the family's planned holiday. Information on their specific parking requirements and drop-off options at the airport are sent to the family via their in-car display. The family chooses their option based on cost, convenience, location and facilities available. They drive up to a curb-side bag-drop and check-in area. They have a short walk into departures where they receive a confirmation message from the car that it has self-parked and is charging itself. On their return they request their car from their mobile comms unit and it self-drives to them.



MAIN IMAGE LEFT: Nissan's Pivo 3 EV concept has one seat in the front and two in the back. The Pivo 3 features Nissan's Automated Valet Parking (AVP), which allows the car to park itself and recharge itself while parked, at specially-equipped parking lots. Also the system can find a parking space, physically park the car and remember where it is. The Pivo 3 can also be remotely controlled with a smartphone.

BELOW: The Mantarays concept is a handheld device using frequencies of light similar to holographics. Images are completely editable directly and, as the unit is wireless, it can be activated by voice or touch.

BOTTOM: Robotic parking allows hundreds to thousands of cars to park in half the space of a conventional parking garage. Minimizing the impact of parking creates more space for design and development that can be used for additional revenue, green space, common areas or other uses that benefit the airport as a whole.



TAXI JOURNEY 2030

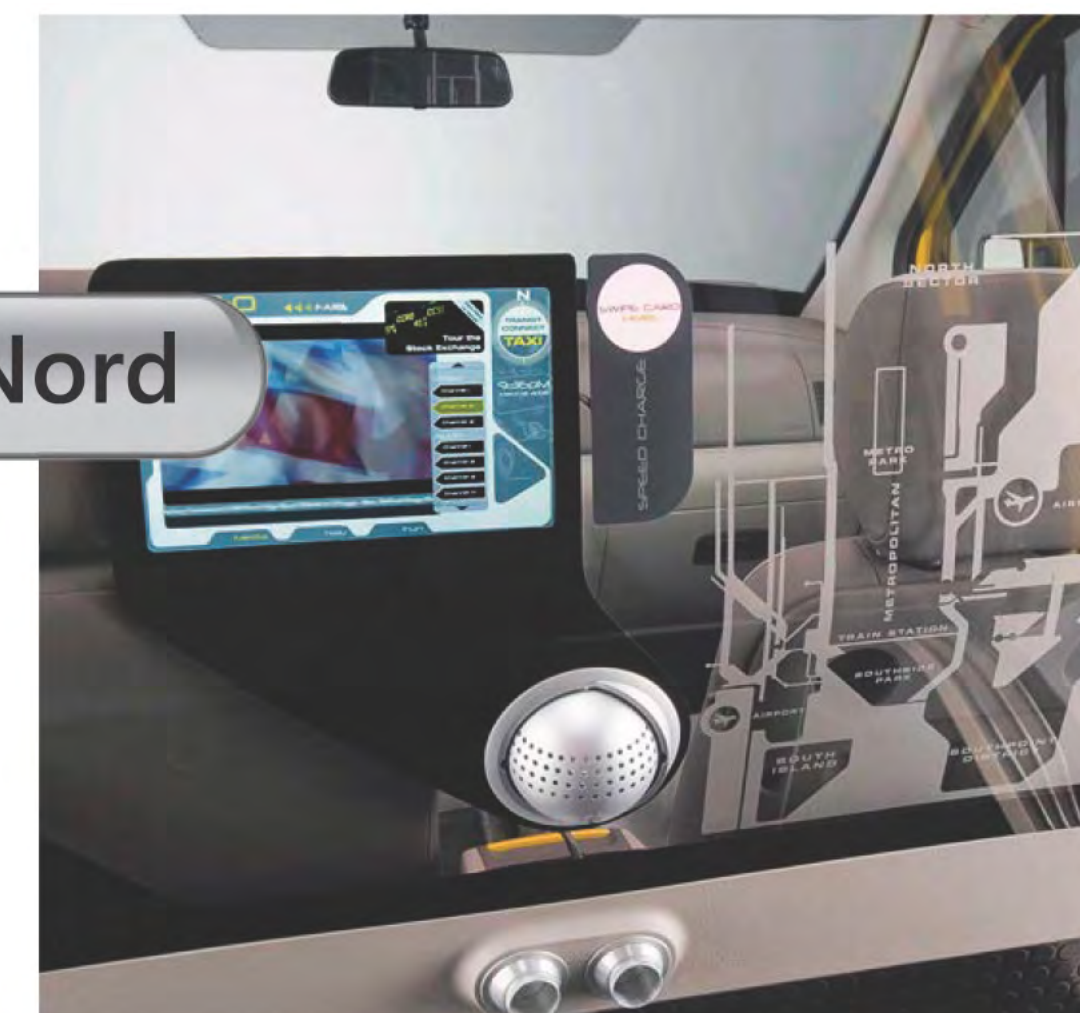
A family of four arrive at Gatwick from France and have not booked their onward journey, but as they arrive they receive a message on the phone as they enter the airport Terminal asking them if they would like a taxi. They answer 'yes' and request the cost for a journey to Worthing. This is provided instantly in their own language and they also pre-order some snacks and drinks for their journey.

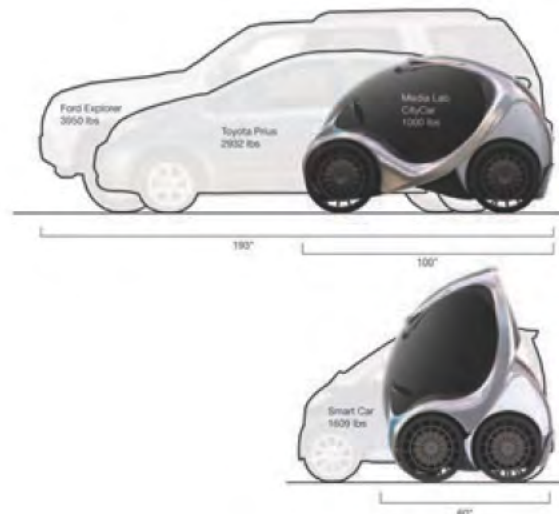
Upon exiting the terminal - an electronic sign is showing their name, they swipe their payment device and the driver escorts them to their electric car. Their end destination is already pre-programmed and their drinks and snacks are waiting. An electronic screen provides them with real time journey information as well as local tourism information during their journey - in their native tongue.

Votre taxi vous attend à la sortie du Terminal Nord

RIGHT: This Robo-taxi concept is a computer operated vehicle. The taxis can seat two passengers with hand luggage and are ideally suited for short journeys within congested areas. It can travel at speeds up to 90 km/h and run for 20 hours using two electric motors.

BOTTOM: The Ford Transit Connect Taxi, already being delivered within the US, will deliver 30-percent better fuel mileage than conventional full-sized, car-based taxis. With a high roof, dual sliding passenger doors, and generous interior room for its relatively small footprint, the Transit Connect makes a logical choice for taxi use. The driver will get an in-dash computer, running Microsoft Auto software, which is linked to the internet and offers traffic, weather, and navigation information and help.





ABOVE: Augmented reality and near field (RFID) devices will be commonplace on all devices and in clothing. The user will have the ability to choose what they want to see, in what language - even within live TV channels - and will have to pay to avoid a plethora of incentive and retail offers.

BOTTOM: The CityCar concept was developed as the cleanest, economical and sustainable solution to meet the demand for personal urban mobility in densely populated cities, and was designed for cities as opposed to the conventional automobile. Designed as an all-electric four-wheel ultra-small vehicle (USV) for two passengers, each wheel is independently digitally controlled, with its own wheel motor, and allows a 0-degree turn radius, enabling it to perform sideways motions for parallel parking. The Hiriko Fold, as it's name suggests, can reduce it's length to only 1.5m and is scheduled to go on sale in 2013.



CAR RENTAL JOURNEY 2030

Prior to disembarking from his flight a single technology platform identifies a businessman travelling to the UK for a business meeting. All stakeholders relevant to his journey are notified of his arrival (including a car hire company and retailers). He joins a fast-track dedicated lane to get to the car collection point. The in-vehicle system is aware of his specific needs and preferences. A pre-programmed travel plan is set up in the hire car ready for a quick and efficient departure from the airport to his destination.





STAFF JOURNEY 2030

A member of airline crew who lives in Crawley needs to report for work at 5am, their phone automatically lets them know that there are no disruptions to their planned journey and the location of the next buses.

As they enter the electric bus, payment including any employee discount is taken automatically from their phone to the payment device on board the bus. Real-time information keeps the crew member updated on their expected arrival time at Gatwick.

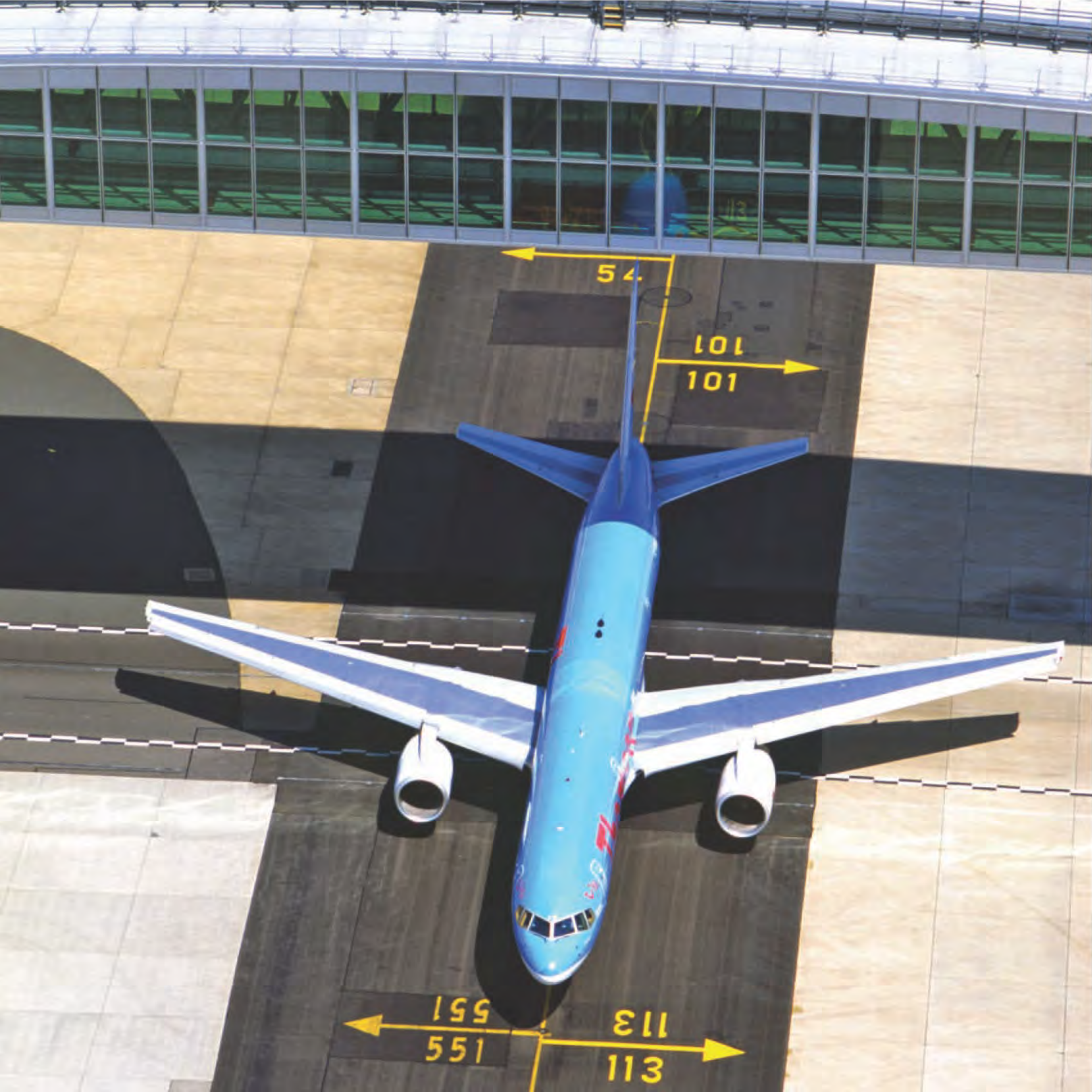
RIGHT: The Connected Bus uses advanced internet technology to enhance the experience of public travel for passengers including touch screens providing real-time information and wait times, free wireless internet access to contact friends and family from laptops or mobile devices, external LEDs informing motorists and pedestrians about the environmental benefits of the bus, traffic signal prioritisation helps drivers avoid congestion and a "find it service" to allow location of services and points of interest near the bus at any time.



BOTTOM: Cloud Vision glasses enhance the user's reality by projecting an overlay image on the inside of the glasses (similar to a head-up-display). Data transfer is bi-directional as sensor data, as well as camera images, from the glasses is sent to the user's smart phone in their pocket via bluetooth. The smart phone combines that information with additional data from the cloud and sends back the overlay image. Made from toughened lightweight materials, these could be used as intelligent safety glasses alerting the user to any health and safety issues within view.

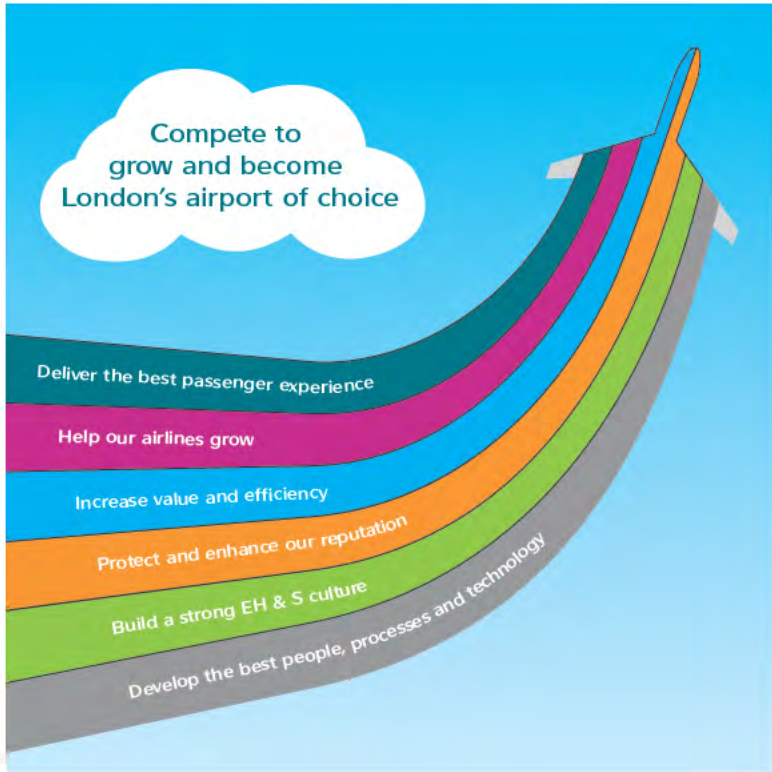


The future journeys we have portrayed create an exciting picture of future travel. Within the rest of our ASAS, we look at how we are going to deliver these visionary journeys. This is based upon Gatwick as a transport hub and each section shows the development of the key characteristics of our hub.



GATWICK AIRPORT

FIGURE 1 GATWICK'S AMBITION AND STRATEGIC PRIORITIES



Gatwick is now competing openly for traffic with London's other main airports and is targeting growth to 40 million passengers per annum by around 2020/21. In order to achieve this target Gatwick has committed to achieving a public transport mode share of at least 40% through this transformational Airport Surface Access Strategy. The strength of the Airport's road, rail, bus and coach connections to the South East and London make it the Capital's best-connected airport.

London and the South East has long been one of the most vibrant markets in the world in terms of airline competition. Gatwick serves around 25% of the London and South East UK air passenger market. In 2011, 33.6 million passengers used the airport. Gatwick is competitive in all sectors of the aviation market and offers a wide range of airline routes including short haul, long haul, low cost carriers (LCC), full service carriers (FSC) and charter airlines. We attract a large range of passengers with diverse characteristics and needs.

The economic contribution of the aviation sector is estimated to be £53 billion (3.8%) of the UK Gross Domestic Product (GDP). Gatwick itself is estimated to have contributed £2 billion to the London and South East economy in 2011, and as the UK's second largest international gateway is a major economic hub in itself. The very location of the Airport has been instrumental in creating an economic area called the Gatwick Diamond which delivers approximately £13 billion GVA per annum.

Our ambition

Our ambition is to 'compete to grow and become London's airport of choice'. In order to achieve this we have a set of strategic priorities by which we run the business (Figure 1). These priorities cascade down into everything we do and this includes surface access.

Surface access to and from the airport is the heartbeat of our airport - we need it to operate efficiently and effectively to achieve our ambition to grow and become London's airport of choice. It is also fundamental to attracting new airlines and is one of the three most important factors affecting an airline's choice of airport.

Attractive to airlines

Airlines considering their future growth, identify new markets as their main driver, they will then choose their preferred airport, which most meets their needs (Figure 2). Whilst capacity and the price of available slots at the airport are important, it is connectivity to their chosen destination using quality surface access modes, which ranks equally as highly. Whilst Gatwick has been successful in attracting airlines - connectivity, quality and affordability of surface transport connections is still a key issue being raised by airlines.



FIGURE 2 AIRLINE GROWTH MODEL

Delivering for our passengers

For air passengers, location and surface access are reported as the most important factors affecting choice of airport (Figure 3), but the decision regarding their journey to and from their destination airport comes later in their travel planning process.

For passengers their journey is all about travel to their chosen destination. The airline, airport and surface transportation they are offered is a consequence of this desire to travel and they treat each leg (e.g. rail, air) as part of the whole journey, requiring integration and a consistent level of quality. However, passengers will switch airports and sometimes destinations if the airport is not adequately connected (Figure 4 as above).

To help us deliver our ambition, we recognise that our passengers have different needs on their journey through the airport and to and from the airport on surface transport. To meet these needs we have developed a number of service propositions for different groups of passengers (premium, business, family, passengers with reduced mobility).

The propositions are based on our passenger commitments of:

- We'll treat you as our guest
- We hate queues
- We love to be on time.

FIGURE 3 FACTORS AFFECTING AIR PASSENGERS CHOICE OF AIRPORT

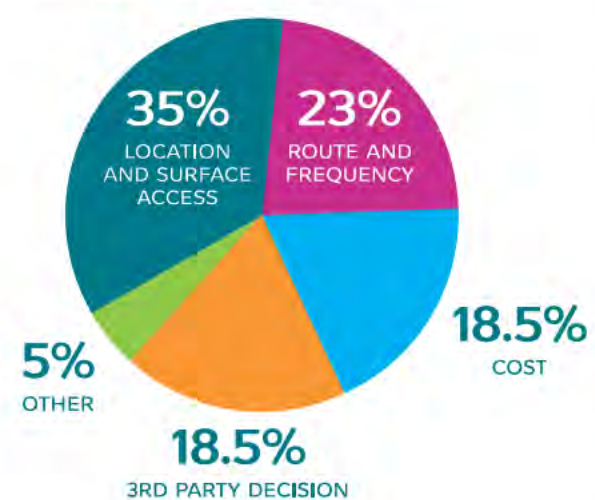


FIGURE 4 AIR PASSENGER CHOICE OF AIRPORT MODEL

Our aim is that surface transport at the airport, and to and from the airport will deliver the outcomes to achieve our passenger commitments and our overall ambition. However this involves a large number of partners.

Gatwick - The Transport Hub

On a daily basis thousands of people and vehicles access the airport and use the 'Gatwick Transport Hub' - this could be as:

- air passengers wanting to travel for business and leisure purposes
- staff, contractors and sub-contractors working on-airport
- business commuters travelling to their place of work or on business purposes
- people making leisure journeys
- logistics which help the airport to function by bringing it supplies and materials
- freight to be transferred by air.

This means that Gatwick is being accessed both as a final destination and as a transport interchange. The Gatwick Transport Hub is focussed around the Airport surface transport facilities - these include the rail and road network. The latter supports buses, coaches, cars, taxi, goods vehicles, cycle and pedestrian movements (Figure 5).

However, to truly be effective as a Hub and deliver consistently for people who want to travel, we must look beyond the airport boundaries to the connections and the facilities off airport. These are part of a passenger's end to end journey and include other rail stations and transport interchanges.

It is also clear that in the immediate future, the transportation industry is moving into a new and exciting era of technological change, with customers wanting more information delivered in real time and relevant for their journey. To ensure we are ready to meet this challenge we have identified a number of fundamental factors, which will help us shape and develop our Transport Hub.

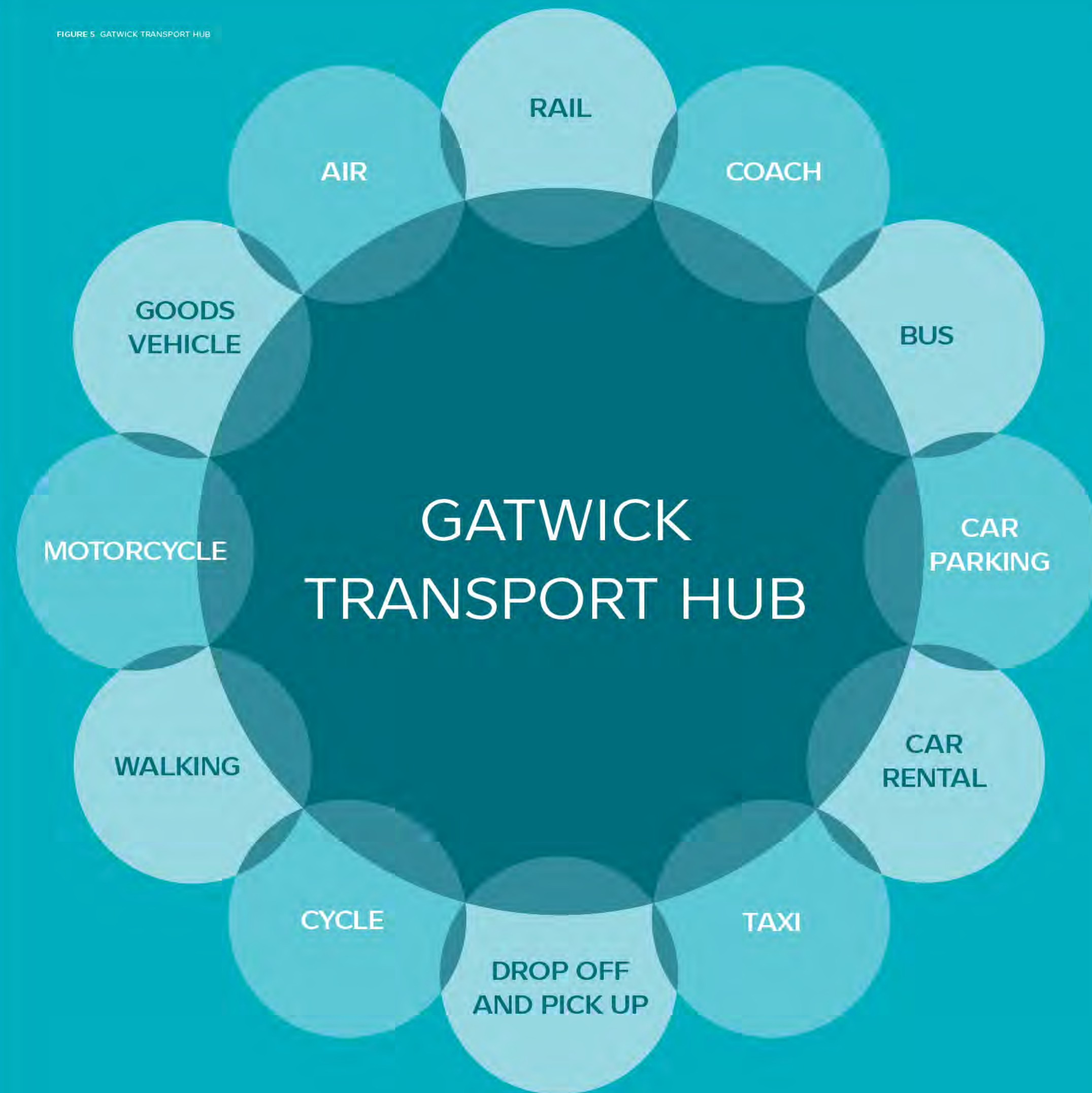
These are to be:

- **Well governed** - taking into account governance structures in place and bringing together key partners to work collaboratively
- **Knowledgeable** - to know who, where, when, how and why people will want to travel and to access resources and information effectively
- **Connected** - to provide the range, type and quality of connections for airlines and passengers and to share these benefits with the community
- **Sustainable** - to reduce our carbon footprint and meet the requirements of future travel
- **Safe** - to ensure staff and travellers undertake their journey safely
- **A place of work** - to meet the needs of staff working on-airport, to work with others to share the benefits with commuters, and to support the logistics of an operational airport
- **Innovative** - to set challenging targets to understand how we are performing and to be continually looking forwards to the next change.

In recognising the need for a different approach to Surface Transport, Gatwick created a new Surface Transport Team in 2012, bringing together the functions of strategy, product development, commercial arrangements and operations. We are one of the first airports to take this fundamentally new approach and it is already receiving positive feedback from stakeholders.

The Airport Surface Access Strategy sets out how we will bring together the Gatwick Surface Transport Team, stakeholders and business partners responsible for travel to and from the Hub, to combine resources and be truly effective.

FIGURE 5 GATWICK TRANSPORT HUB



Working in partnership

Working together and in consultation is a core activity and Gatwick listens closely to the views of its partners and stakeholders. The Transport Forum Steering Group, which acts as an executive committee of the Airport Transport Forum, has worked together to guide and develop this ASAS to achieve our vision through the following objectives:

- present a clear framework to guide the development of the Gatwick Transport Hub
- identify current and future connectivity requirements
- provide a framework of how this will be developed with business partners, sustainably and safely
- provide a mechanism for bringing forward innovation and future technology improvements
- contribute to, and influence Local Transport Plans and Local Development Frameworks
- provide the framework to set challenging targets for surface access.



The Gatwick Airport Surface Access Strategy

The Gatwick Transport Hub is at the very core of this transformational Airport Surface Access Strategy (ASAS), which sets a new benchmark for airport surface access strategies. This document replaces the 2007 ASAS and a new five year Action Plan will be developed to replace the 2011 Action Plan.

Our vision is to:

- be the best connected and accessible UK airport, delivering integrated surface transport
- contribute to the sustainable economic growth of the local community and of the UK economy
- lead the way for best practice in Surface Access Strategies, with innovation at its core.

Traditionally, Government guidance only requires an Airport Surface Access Strategy to cover a 5 year period. We believe that this is too short a period to be really effective given the transport industry planning timescales, therefore we have planned for the period from 2012-2030, to align to our Airport Master Plan. The Airport Master Plan sets out the overall vision and strategy for the airport and the broad approach and major challenges we face. This ASAS sets out the Strategic Priorities for each area of surface transport which shape our Vision and will help us achieve our objectives.

In July 2012, the Government published a consultation document on the 'Draft Aviation Policy Framework' where they suggested that the ASAS should become part of an Airport's Master Plan. Both Gatwick Airport and its Transport Forum Steering Group have reviewed this proposal and feel that the ASAS should be a separate document, but aligned to the Airport Master Plan timescale.

Within the ASAS we have focused on the main purpose of the passenger journey, which is 'Travel', rather than an individual segment of the journey.

We have achieved a new level of stakeholder engagement by challenging ourselves and our stakeholders to look at the future and the scale of change this is likely to bring. The public consultation for the Airport Master Plan provided a substantial amount of feedback on the public's views of surface transport at Gatwick and this has been considered in developing this ASAS.

In 2012, we brought together 80 of the top UK transport professionals from national and local stakeholders to help shape the vision of what travel will be like in the future. The event focussed on a 'user centric' approach to surface transport provision with the customer at its heart. The outcomes of the workshops are at the core of our Strategy.

In the following sections we will demonstrate how the Gatwick Transport Hub will be developed based on the following principles of transport hubs. These are:

- Well Governed
- Knowledgeable
- Connected
- A place to work
- Safe and Sustainable
- Innovative - Challenging Targets

For each of the principles of our Transport Hub we have identified passenger trends, current and future developments, followed by the Strategic Priorities. The detailed targets for delivering these priorities will be developed through a series of five year action plans over the period to 2030. The first Action Plan will be developed in 2013 by the Transport Forum Steering Group. It will be reviewed every three years.



ONE



WELL GOVERNED

OUR TRANSPORT HUB

Being well governed is at the core of our Transport Hub and our ASAS. There are a large number of governance and policy requirements at both a national and local level which we consider relevant.

We have grouped these into 6 key areas where the Gatwick ASAS:

- Supports the Government's plans for economic growth
- Supports sub-regional development and connectivity
- Is aligned to the emerging and shifting centres of connectivity in the wider region
- Is aligned to sustainability objectives
- Supports wider tourism strategies
- Delivers Government sustainable development policy

Supports Government's plans for economic growth

Airports are increasingly seen as critical gateways of economic development as echoed across multiple strategic policy documents.

The **Government's Plan for Growth** observes that 'Britain has lost ground in the world's economy and needs to catch up'. London First's policy paper **London, Britain and the world: Transport links for economic growth** notes that 'London's ability to attract the best and brightest workers, to export world-beating services and reach customers, clients and suppliers, is one of our greatest sources of competitive advantage... Poor infrastructure that undermines London's competitiveness will lead to new investment and jobs going overseas, not elsewhere in the UK'.

The **South East Airports Taskforce Report** was produced in direct recognition of the very important role the region's airports (including Gatwick) play in providing the connectivity the UK economy needs to compete in a global economy.

Accordingly, the report has a strong emphasis on modernising airport associated infrastructure to improve performance and deliver a better passenger experience, and similarly places this as critical to delivering sustainable growth.

The policy environment therefore positions high quality and efficient surface access to airports as strategically influential in supporting the growth agenda.

The **2006 Eddington Transport Study** remarks that 'surface access routes to airports are critical parts of international journeys', while London First notes that 'the quality of our air links is tied to the quality and capacity of surface access and both are critical to London's continued success as a leading centre for world trade, commerce and tourism'.

Gatwick is competing to grow and this ASAS has been developed to support this. The airport is positioning itself as a gateway to emerging economies. The ASAS is rooted in the realities of a globalised world and recognises the critical importance that first-class surface access has for London and, inevitably, the UK's competitiveness and plans for growth.

Gatwick's growth strategy is targeting a blend of international long haul services and short haul leisure and business traffic. In recent years we have been very successful in attracting new airlines from the Far East as well as further European carriers.

The relevance of surface access to airports within the wider economy is demonstrated by Gatwick's rail strategy. This has reconciled local commuter demand with air passenger requirements, recognising the gateway role of good surface access. Network Rail's **Sussex Route Utilisation Strategy (RUS)** identifies a lack of future capacity on the Brighton Mainline service between Brighton, Gatwick and London unless intervening action is taken. The number of people travelling between Gatwick and London by rail could increase by 30% in eight years and the number of non-air passengers travelling on the same services could grow by 29%. The ASAS recognises the implications of a poor surface access offer for passengers, on wider aspirations for growth.



Supports sub-regional development and connectivity

Prioritising sub-regional surface access connections to Gatwick is increasingly reflected in policy documents and institutional arrangements.

The Government's Local Enterprise Partnership (LEP) initiative, most notably, has provided a fitting policy environment for a natural economic area such as the Gatwick Diamond to drive sustainable growth and job creation in the area through improved accessibility. Accordingly, the Gatwick Diamond area (Figure 6) forms the economic heart of the Coast to Capital LEP, enhancing the inter-relationship between Gatwick and Brighton, rural and coastal West Sussex and Croydon.

The Gatwick Diamond Futures Plan has three policy goals 'concerned with creating the conditions to support and encourage appropriate physical development within the diamond that will in turn meet the needs of existing and future employers and communities'. The transport network is acknowledged as one of the greatest economic assets in achieving this ambition, with the plan stating that 'maintaining and improving connectivity is of critical importance to becoming a globally competitive economy'.

The Coast to Capital LEP (Figure 7) sets priorities for international trade and entrepreneurship; also identifying transport links as one of the cornerstones of achieving growth. Addressing the 'patchy transport infrastructure' of the area is underlined as a key challenge, particularly in terms of those areas with lower productivity.

Surrey Connects Enterprise Partnership has identified that 'investment in its key business critical infrastructure' is a strategic priority, which will include effective transport to and from Gatwick. The South East Local Enterprise Partnership encompassing East Sussex, Essex, Kent, Medway, Southend and Thurrock has identified that it must address existing transport network congestion, which in the absence of action will be exacerbated in the future.



The Mayors' Transport Strategy (MTS) sets out the transport vision for London and details how Transport for London and partners will deliver the plan over the next twenty years. It is a key part of the strategic policy framework to shape and support London's social and economic development. The South London Sub Regional Transport Plan (SRTP) addresses the goals and challenges set out in the MTS and shows how they will be addressed at a sub-regional level. Accessing Gatwick and the Gatwick Diamond is a key issue for the sub region as well as London. The South London SRTP highlights improvements to the transport network that will help people access Gatwick in the future such as Crossrail and the Thameslink programme.

In May 2012, the Secretary of State for Transport published plans for a 20 year strategy for the national road network and new challenging performance targets for the Highways Agency to deliver against. This will include:

- championing the road user including the setting of the performance specification
- a much smarter approach to planning through the production of route based strategies. They will set out investment plans to inform our decisions for the next spending review. This will include much greater participation in planning for the network from local and regional stakeholders
- work towards smarter financial relationships with Government.

The sub-region's authorities Local Transport Plans (LTP) (West Sussex, East Sussex, Surrey and Kent) strongly adhere to partnership working in order to promote the economic vibrancy and quality of life in the region through enhanced connectivity. The West Sussex Local Transport Plan 2011-2026 in particular, focuses on Gatwick and the Diamond area, acknowledging the reliance of the local economy on a successful Gatwick Airport and the importance of sustainable transport and increased connectivity to improve access to services and employment.



The West Sussex LTP identifies rail connectivity, growing congestion and the following connection challenges to be addressed in order to support the growth of the Gatwick Diamond:

- the 'poor rail connectivity between Gatwick and the Thames Valley and areas north of London, and to the east and west'
- growing congestion on the strategic road network exacerbating unreliability in journey times and affecting the competitiveness and quality of life of the area
- further road traffic leading to increased noise and emissions with resulting health and environmental issues.

The West Sussex Local Transport Plan is concerned with growing congestion in the Gatwick area and accordingly recommends that opportunities to extend the Crawley Fastway bus service should be explored.

Future congestion on the A23 is of particular local concern and mitigation strategies will be required to manage the combined impact of local traffic growth and more air passengers at Gatwick, some of whom will travel by car.

Kent's Local Transport Plan (2011-2026) identifies an aspiration to introduce direct rail services between Ashford and Gatwick Airport because the county currently lacks a direct link to the airport following the cessation of services from Tunbridge Wells and Tonbridge via Redhill in 2008. Such a connection would 'significantly improve Ashford's ability to attract major employers to the town and would facilitate interchange between domestic air and international rail services'. Kent's LTP also notes that 'the East Kent coastal towns and the large number of rural communities in the County experience relatively poor accessibility to services'.

FIGURE 6 GATWICK DIAMOND



East Sussex's Local Transport Plan (2011-2026) highlights that the county's rail network is 'restricted by shortcomings in the infrastructure which affects both east/west movements along the coastal corridor, connections to Brighton, Ashford and Gatwick Airport, and also between Hastings and London'. Improvements to the Brighton Main Line railway, Gatwick Airport rail station and the Thameslink service could reinforce the links between Gatwick and the East Sussex coast, particularly if services to Eastbourne are included.

Surrey's Local Transport Plan (2011-2026) calls for rail improvement measures to 'enhance the capacity of the existing rail line between Reading and Gatwick Airport, thus facilitating orbital movement around London'. At present, the line has major capacity restrictions limiting its expansion capability.

Improving the east to west orbital surface access connections between these peripheral areas and Gatwick can play an important role in improving those areas of the South East economy which lag behind in comparable economic performance. Gatwick's ASAS endeavours to support the integration of the sub-regional economy through improved orbital connections as a means to promote growth for all.

In 2001, Gatwick Airport Limited (GAL) signed a Section 106 Legal Agreement with Crawley Borough Council (CBC) and West Sussex County Council (which was renewed in 2008).

The agreement outlines how the airport's operation, growth and environmental impacts will be managed responsibly. The surface transport obligations are detailed in Appendix 2 and this ASAS sets out how we will continue to deliver these.

The plans and policies for the Crawley area are set out in CBC's Local Development Framework, Core Strategy, October 2008 Revision, and in saved policies from the Crawley Borough Local Plan (2000). Chapter 8 of the Core Strategy deals with Gatwick Airport and sets out the objectives, sustainable development approach and policies. CBC are preparing a new Local Plan which will replace the 2008 Core Strategy. It is anticipated that this new Local Plan will be adopted in 2014.



FIGURE 7 COAST TO CAPITAL LEP AREA



Alignment to the emerging and shifting centres of connectivity in the wider region

Significant investments in new transport infrastructure, alongside substantial regeneration initiatives, are underway in London and the South East. These relate to Government plans and investment policies supporting economic growth. Gatwick's ASAS aligns to these developments and the shifting time-space geographies they bring about. The following projects are considered to be the most influential in restructuring Gatwick's surface access:

- **Thameslink:** A £6 billion Thameslink Programme is currently underway which will upgrade and expand the network, providing longer trains with greater capacity, more destinations and better stations with direct connections to Gatwick.
- **Crossrail:** Crossrail is a major new east-west fast rail link under central London, due for completion in 2018. Crossrail incorporates a connection at Farringdon on the Thameslink network directly linked to Gatwick Airport.
- **Farringdon:** Farringdon Station will provide the only nexus between Thameslink and Crossrail and the London Underground, consequently becoming one of the country's busiest stations.
- **London Bridge:** As part of the Thameslink upgrades, London Bridge Station will also undergo a major transformation in a Masterplan project that will create a new London Bridge Quarter comprising commercial and residential development less than 30 minutes from Gatwick.
- **Croydon:** Croydon is currently experiencing dynamic regeneration and growth with some £3.6 billion of investment in consented and proposed development projects. The city is promoted as a new hub of living, retailing, culture and businesses in South London and South East England, with Gatwick on its doorstep;
- **East London:** The London 2012 Olympic and Paralympic Games site supports the unique and unparalleled regeneration of East London, with an estimated £9 billion of investment concentrated around the area of Stratford. This also includes the upgrades and



investments on the DLR, East London Line, and Jubilee Line. With the arrival of Crossrail, and a strong focus on legacy throughout the London 2012 planning process, Stratford is set to shift London's core eastwards.

- **Victoria tube and railway station:** By 2018, TfL will have completed a significant upgrade to the tube and railway station which includes new ticket halls, escalators, interchange tunnel, lifts and improved access and new lifts between the National Rail and Tube platforms.
- **Redhill Station improvements:** These were identified in HLOS2 as a scheme to enhance connectivity from Gatwick to the west of London to Reading. Within the proposal for the Great Western Rail Franchise consultation were proposals for 2 trains an hour from Reading to Gatwick and this scheme will facilitate future connectivity for any Kent rail proposals.
- **M25 Improvements:** The Highways Agency commenced initial works for the managed motorway scheme for hard shoulder running on the M25 between Junctions 5-7. Proposals also exist for controlled motorways between Junctions 7-10. Both schemes will improve connectivity both to the South West and North. In addition to this The Highways Agency is also considering free flow tolling at the Dartford Bridge. This scheme would provide more consistent journey times for passengers travelling from the North of the airport and reduce a key congestion 'hot spot'.

These pivotal infrastructure developments and regeneration centres are of strategic importance for Gatwick's ASAS which seeks to capitalise on these improvements by connecting to these strategic growth corridors.

Alignment to the sustainability objectives

Sustainability is a fundamental theme of aviation policy; which imparts significant responsibility on surface access strategies to address the substantial environmental footprint of airports.

The coalition Government published a consultation on developing a 'Draft Aviation Policy Framework' in July 2012. The focus of this document was to prioritise the role aviation has to play in delivering carbon reduction goals and expecting the industry to reduce the carbon impact of its ground operations and surface access. This consultation highlights the importance of rail connectivity to airports, the role of the transport forums and airport surface access strategies.

The 2003 Aviation White Paper and The Future of Air Transport, which remains current policy until replaced, states that 'easy and reliable access to airports, which minimises environmental, congestion and other local impacts, is a key factor in considering any proposal for new airport capacity' and that 'increasing the proportion of passengers who get to airports by public transport can help reduce road congestion and air pollution'.



The Department for Transport's White Paper Creating Growth, Cutting Carbon: Making Sustainable Local Transport Happen sets out its vision for a transport system that is an engine for economic growth, but one that is also greener and safer and improves quality of life in communities. The South East Airports Taskforce Report (2011) prescribes that airport operators identify 'soft' measures (i.e. not requiring significant infrastructure investment) to increase the use of low carbon transport to access airports.

In 2011, 30% of Gatwick airport's total carbon footprint was attributable to its surface access. The ASAS has therefore been developed with sustainability principles at its forefront and the intention to improve this figure. In particular, the ASAS underlines rail surface access as a key means to achieve such objectives, taking note of the Department for Transport Command Paper Reforming our Railways: Putting the Customer First which recommends that Government, airport operators and local authorities develop options for improving rail links in order to achieve sustainable surface access. The Command Paper highlights the transfer of responsibility for the management and operation of Gatwick Airport station from Network Rail to the operator as an example of streamlining efficient delivery with better passenger outcomes.

The ASAS also contributes to the Gatwick Airport Sustainability Policy which aims to:

- deliver a strong community programme
- maximise our local regional and national economic benefits
- remove or mitigate our environmental impacts
- set the right standards and practices
- enable our staff to be environment champions
- understand the needs of our stakeholders and partners.

Gatwick's ASAS will enable the sustainability objectives to be achieved in parallel with economic objectives.

Supporting wider tourism strategies

Gatwick remains a predominantly leisure orientated airport with 86% of all passengers flying for leisure purposes. It also offers one of the most important ports of entry into Britain, catering for 9% of all tourists' visits to the UK. The ASAS has an important role to play in relation to wider tourism strategies.

The Department for Culture, Media and Sport (DCMS) Government Tourism Policy published in 2011, presents tourism as offering 'one of the fastest and most efficient ways to deliver rapid economic growth'.

Deloitte forecasts that the UK visitor economy will be one of the country's best performing sectors, with above average growth of 3.5% GVA per year until 2020.

In order to promote the UK's ambitions for tourism, Gatwick's ASAS seeks to improve the airport's connections to key destinations in the UK, and take into account the first and last impression that the airport's transport links create for every visitor passing through the airport to or from the UK.

Gatwick's ASAS role in delivering Government Policy

A number of Government Policies have already been mentioned such as:

- the Department for Transport's White Paper Creating Growth, Cutting Carbon: Making Sustainable Local Transport Happen
- the South East Airports Taskforce Report (2011) prescribes that airport operators identify 'soft' measures (i.e. not requiring significant infrastructure investment) to increase the use of low carbon transport to access airports.

However, the role of Airport Transport Forum and Airport Surface Access Strategies was set out in earlier governance, namely the 1998 Transport White Paper, A New Deal for Transport: Better for Everyone and again in the 2003 Aviation White Paper. This set out the requirement for each major airport to establish an Area Transport Forum (ATF) and prepare an Airport Surface Access Strategy.



This set out three key objectives for Airport Transport Forums, which are to:

- agree short and long-term targets for increasing the use of public transport
- devise a Strategy for meeting these targets
- oversee and monitor the implementation of the Strategy.

In July 2012, the Government published for consultation the Draft Aviation Policy Framework which considered the role of both Transport Forums and Airport Surface Access Strategies. It set out that 'High quality, efficient and reliable road and rail access to airports contributes greatly to the experience of passengers, freight operators and people working at the airport. Greater use of low carbon modes to access airports also has the potential to reduce CO₂ emissions, as well as leading to less congestion and improved air quality.'

The document also recommended that airports:

- 'take the opportunity to review the membership and terms of reference of their committees to ensure that local interests are fully represented and that there is no duplication of activity of committees'. The Gatwick Transport Forum Steering Group has carried out this exercise and identified a plan moving forward
- 'combine their ASAS's into their published master plans to ensure a joined-up approach and make it easier for people to access information about the airport's plans'. The Steering Group has considered this approach and feel that Surface Access at Gatwick is best set out in a separate Airport Surface Access Strategy, which is aligned to the Airport Master Plan and its timescales.

Gatwick Area Transport Forum

The Gatwick Airport Transport Forum was set up in 1998 to establish a partnership approach to the way in which surface access to and from the Airport and within the surrounding area could be improved. By looking at transport issues in an area-wide context, we have found an integrated approach to transport initiatives across the Gatwick area that has yielded benefits.

The Forum comprises members of local authorities, regional and national government, transport operators, airport companies and other local businesses or interested parties, with over 70 organisations now being represented.

However, in 2012, The Steering Group of the Transport Forum recognised that in order to deliver a transformational ASAS it needed the right governance structure in place. It reviewed its activities and Terms of Reference which are to:

- agree short and long-term targets for increasing the use of public transport.
- devise a strategy for meeting these targets, for incorporation in the Local Transport Plan
- act as an executive board for the Transport Forum ensuring that a holistic approach is taken to the transport needs of Gatwick Airport and the surrounding areas.



The Steering Group has the following representatives:

- Gatwick Airport Limited
- Network Rail
- Highways Agency
- Crawley Borough Council
- West Sussex County Council
- East Sussex County Council
- Surrey County Council
- Reigate and Banstead Borough Council
- Tandridge District Council
- Gatwick Diamond Initiative
- South London Partnership
- Transport for London
- Metrobus
- Gatwick Airport's Passenger Advisory Group (GATCOM).

The Steering Group has reviewed its membership against the 2012 Draft Aviation Policy Framework Consultation document recommendations and would welcome regular attendance by representatives from our train and coach operators and airlines.

WELL GOVERNED

STRATEGIC PRIORITIES

To protect and enhance Gatwick's reputation for sound and sustainable governance as a key transport hub by continuing to bring key stakeholders together through the Transport Forum.



TWO



KNOWLEDGEABLE USING DATA



Detailed knowledge about passengers (who, what, when, why and how people are travelling to and from Gatwick) is vital to deliver, monitor and review the effectiveness of our Strategy. This knowledge must be of sufficient detail and diverse in nature. It should cover air passengers, employees, commuters and logistics supporting the operation of the airport.

Gatwick is Europe's busiest point to point airport with only 8% of passengers transferring between flights. It is the only London airport with airline routes to 10 or more domestic destinations and therefore remains important for UK leisure and business passengers connecting to international flights.

Passengers

In 2011, passenger numbers grew 3.5% to 33.6 million against the impact of the economic downturn in the UK and the world economy. This is the first year of growth since 2007, when the airport was at its busiest with over 35 million passengers in a year (Figure 8). It coincides with Gatwick attracting several new airlines to begin operating from the airport, and other airlines increasing the number and range of departures. The 20 year trend indicates that demand for air travel will increase at Gatwick, although at a slower pace than over the decade to 2007, with the airport expected to reach 40mppa in around 2021 (Figure 9) as set out in the Gatwick Master Plan.

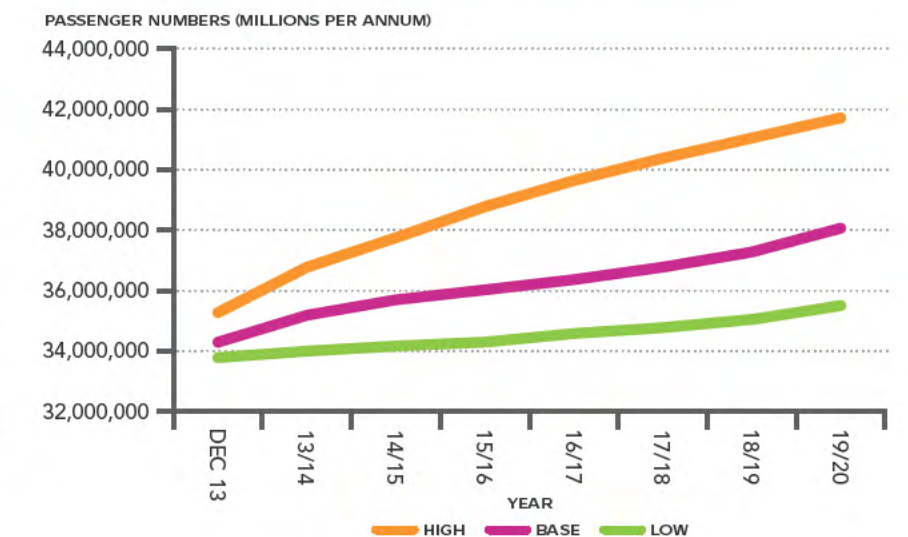
Within the overall growth of passengers we also expect there to be changes in the mix and type of our passengers, which we need to be ready to cater for in the future e.g. more business travel, older people, people with reduced mobility etc.

By the time we reach 40mppa - we expect to have 37mppa non-transferring passengers using surface access which is only 7 million less than Heathrow does now.

FIGURE 8 GATWICK AIRPORT ANNUAL PASSENGER FIGURES



FIGURE 9 FORECAST GROWTH OF GATWICK AIRPORT (2012 GATWICK MASTER PLAN)



Who our passengers are

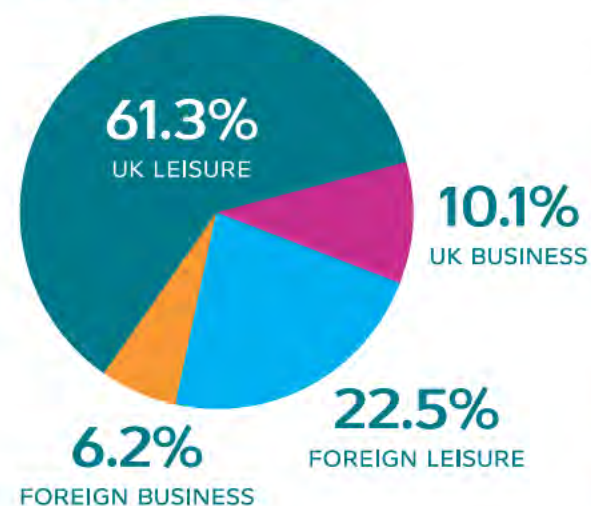
High proportions (73%) of flights from Gatwick are short haul international flights, which provide vital connectivity to key European centres. In 2011, 24 million passengers were UK based travellers and 9.8 million were foreign based travellers (Figure 10).

Over 5.5 million Gatwick passengers were business travellers. Better surface transport connectivity is key to developing business customer confidence and provides vital access to input and output markets and increases collaboration.

The Civil Aviation Authority (CAA) undertakes regular independent surveys of the air passengers using Gatwick and this is one of our primary sources of information about the patterns of travel by air passengers.

A clear trend in our passengers has been the increasing number of older travellers and those who need assistance to travel (Passengers with Reduced Mobility (PRM)). This has been increasing 15% year on year (Figure 11).

FIGURE 10 PERCENTAGE PASSENGER TYPE AT GATWICK AIRPORT (CAA 2011)



Where our passengers come from

Passengers from the South East of England outnumber all other air passengers by nearly four to one at Gatwick, reinforcing the importance of connectivity to the region and London (Figure 12). However, Gatwick also serves the wider UK market, which demonstrates its national importance (Figure 13).

How passengers travel to and from the airport

The CAA data can also be used to demonstrate the surface transport travel choices by our air passengers and how these have been changing (Figure 14, Appendix 1 Table 1).

In 2011, the data showed that rail continues to be the dominant form of public transport for air passengers and this has continued to grow year on year. Equally the proportion of passengers travelling by car to and from the airport has been declining. Most other modes of travel have remained relatively static. In 2011, 42.2% of the 33.6 million passengers per annum (mppa) who used Gatwick travelled by public transport for their journey to and from the airport.

We are also able to look at the public transport mode by specific transport corridor from Gatwick (Figure 15, Table 3) and there has been a steady increase in all corridors of the use of public transport except for the Kent and Brighton and Hove corridors.

TABLE 3 AIR PASSENGER PUBLIC TRANSPORT MODE SHARE

CORRIDOR	2011 PUBLIC TRANSPORT MODE SHARE
Central London	82.1%
Kent	9.5%
Brighton and Hove	46.1%
Rest of Sussex coast	29.2%
M3 (Hampshire/Dorset)	29.5%
M4/M40 Thames Valley and beyond	29.3%

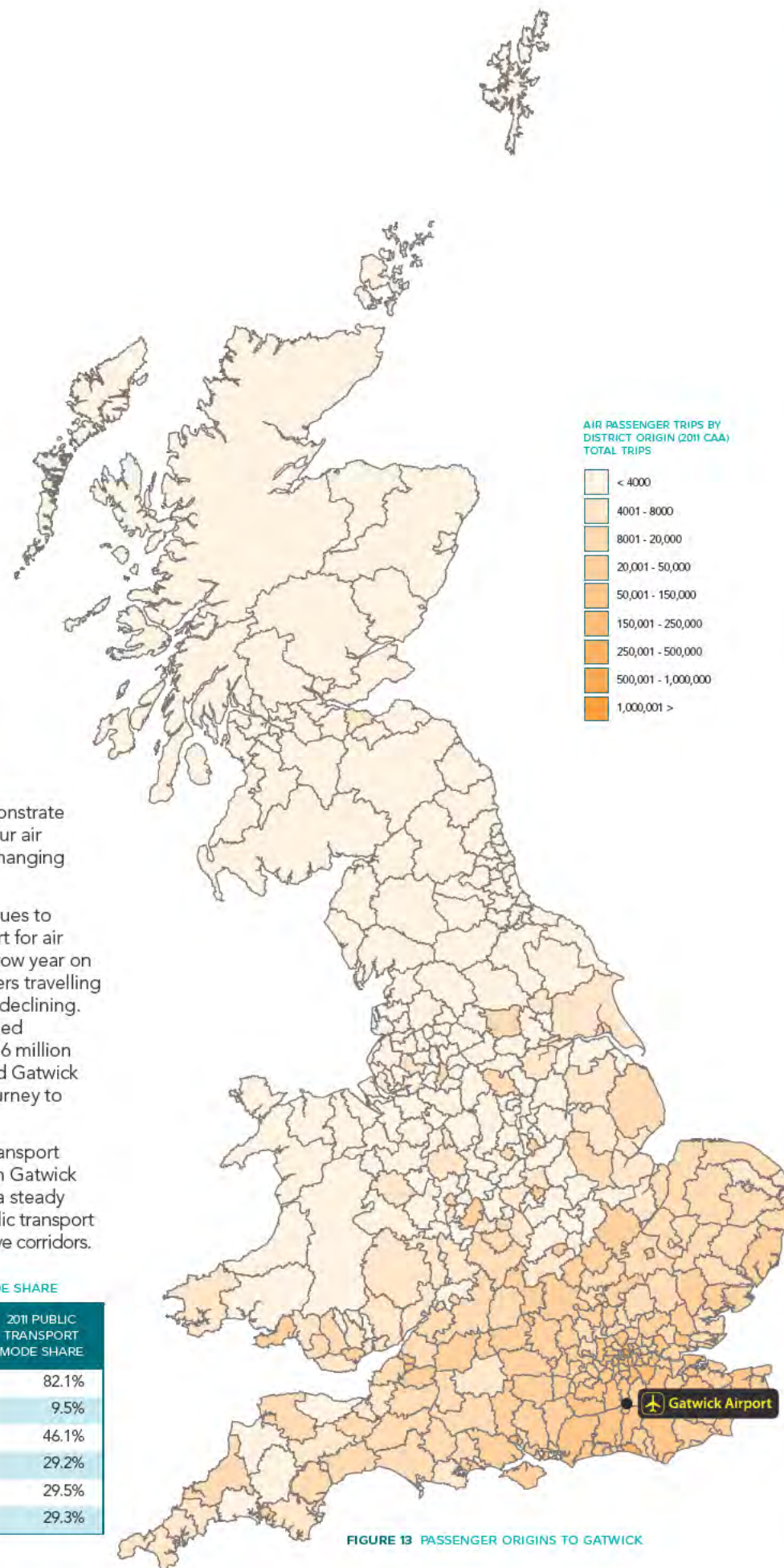


FIGURE 13 PASSENGER ORIGINS TO GATWICK

FIGURE 11 PASSENGERS WITH REDUCED MOBILITY (PRM)



FIGURE 14 PERCENTAGE PASSENGER TRANSPORT MODE SHARE 1998-2011 (CAA)

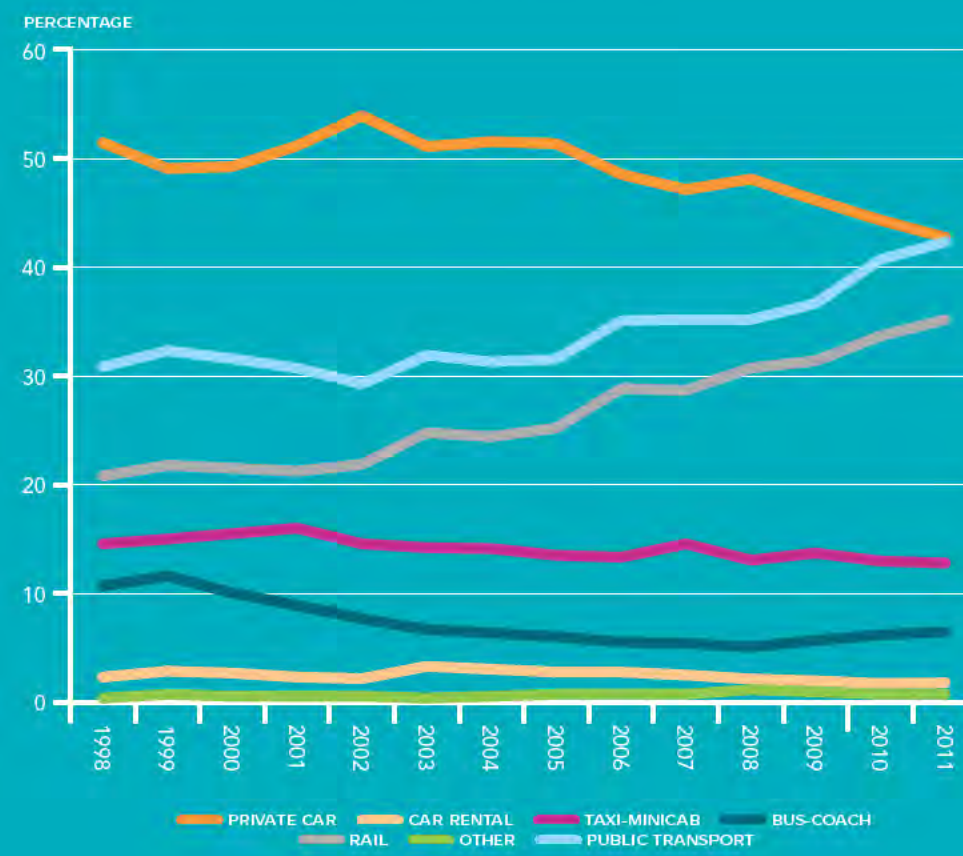


FIGURE 12 PERCENTAGE PASSENGER ORIGINS IN THE SOUTH-EAST UK (CAA 2011)

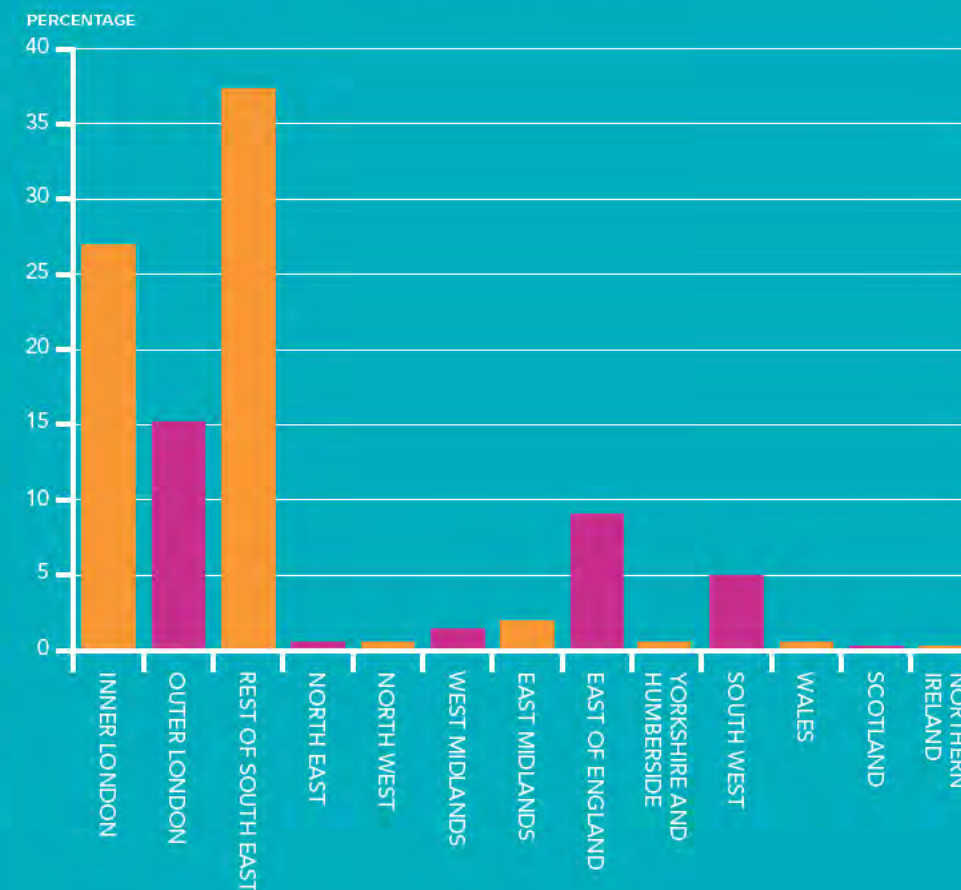


FIGURE 15 AIR PASSENGER PUBLIC TRANSPORT MODE BY TRANSPORT CORRIDOR (CAA 2011)



How employees travel to Gatwick

The Airport carries out employee surveys and travel to work surveys for airport employees every five years or so. The latest survey, carried out in 2012 indicated that there were over 21,100 employees on-airport representing 230 companies. By the time the airport reaches 40mppa, it is expected that there will be around 22,200 employees on-airport.

- Some outcomes of the 2012 survey include:
- 35% of airport employees live in the borough of Crawley, 11% in Reigate and Banstead, 8% in Mid Sussex and 6% in both Horsham and Brighton (Table 5, Figure 16)
 - 84% of staff work shifts, many of whom work a 4 day shift pattern
 - the average commute for staff is 25 miles
 - the average wage on-airport is £23,000
 - 95% of staff employed are in permanent jobs
 - over a third of staff are over 45 years of age.

Gatwick has consistently achieved a reasonable sustainable transport mode share for employees at 35% (Figure 17) when compared to other airports such as Stansted (31%) and the regional average (25%). The employee travel information can also be broken down into corridors (Table 5). However, between 2007 and 2012 the overall public transport mode share percentage has remained static (Appendix 1 Table 4).

This has prompted a radical rethink about how we deliver staff travel initiatives at Gatwick.

FIGURE 17 EMPLOYEE TRAVEL MODE SHARE IN 2012

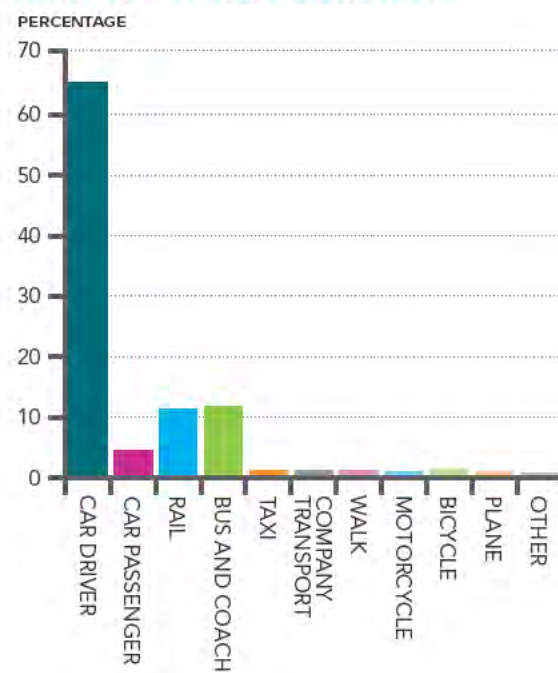


TABLE 5 EMPLOYEE PUBLIC TRANSPORT USE BY TRANSPORT CORRIDOR

TRANSPORT CORRIDOR	2012 PUBLIC TRANSPORT %
Crawley/Horley	34%
Croydon, Bromley and Merton	37%
Brighton and on Sussex coast	22%

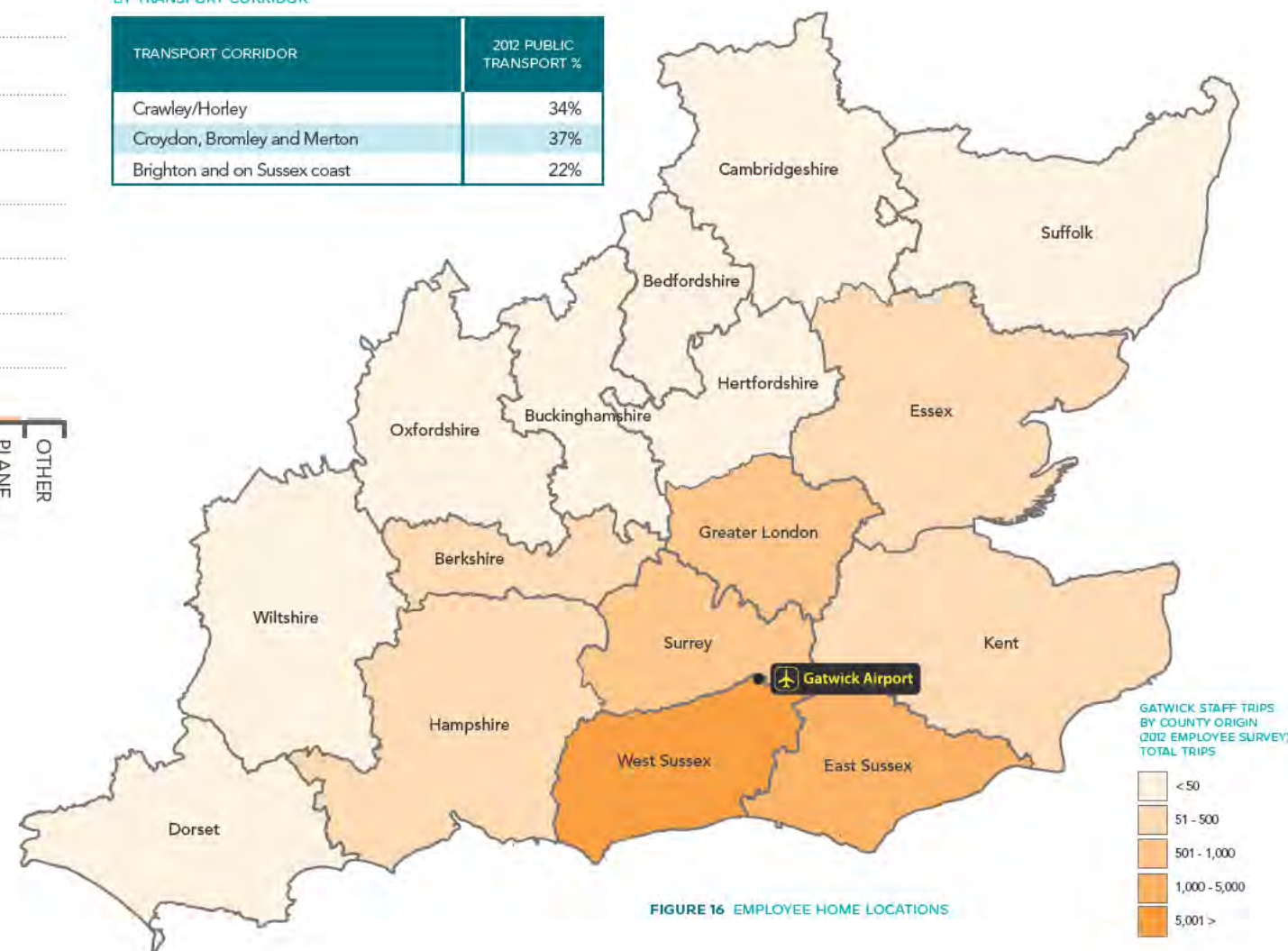


FIGURE 16 EMPLOYEE HOME LOCATIONS

KNOWLEDGEABLE PLANNING TRAVEL

Knowledge for passengers and travellers is essential in planning their travel and this activity does not change whether they are an air passenger, employee or commuter. The levels of knowledge and how to access information may differ, but their key focus will be firstly on how to get to their destination and then the transportation or the infrastructure required to achieve this.

In preparation and on their journey, passengers want:

- relevant, accurate, up to date information, communicated in an understandable and timely manner
- empowerment. Given the ability to decide their own journey, optimize their route and manage costs, but with the opportunity to seek help if they want it
- appreciation and the fact that they chose the particular form of transport and would like recognition for it
- not to be irritated by their experience.

We feel as an industry, transport could currently be described as providing:

- general announcements and timetables that are not personal
- fixed routes, inflexible costs/tariffs
- over complicated products and tariffs.

We have reviewed the areas where we have received feedback - to receive negative feedback we have clearly irritated our travellers.

The main areas for feedback have been:

- availability of information before and during their travel, including alternatives
- way finding/direction signing
- customer service experience by staff
- quality of transport mode and accessibility of transport mode
- operation times to meet their schedule
- complicated ticketing.

Therefore, in order to move forward in creating a 'user centric' transport hub for Gatwick, we have to have a fundamentally different approach; one which is passenger focused and looks at our industry through their eyes.

Our ASAS will only be successful if all of our stakeholders can come together, meet passenger needs and truly integrate all forms of transport.

One of the most complicated factors we have to overcome is the number of companies and organisations which are involved and which can actually affect a passenger journey. This is not without its challenges, however if all members of the Transport Forum embrace the principles of 'user centric' design, this should provide both ourselves and our stakeholders with the ability to deliver.

In addition, we are at the cusp of another fundamental decade of change in technology and many areas which are currently in limited use or in prototype will become main stream within the next ten to twenty years.

For example in 2010, Deloitte estimated that by 2020 electric cars and other alternatively fuelled cars will make up a third of the total of global car sales and by 2020 it is estimated that there will be 80 billion hand held devices in use world-wide.

In the future we will have to continually embrace innovation and the continued evolution in technology which will change the way in which we all live. Fundamental to this is the expectation that there will be a continued and steady increase and reliance on personal devices such as smart phones etc. to undertake daily activities, including travel.

We will need to decide what information we 'pull' and we 'push' to meet the demands of our passengers who will want to be in contact all the time. At the same time we will have to cater for our passengers who are at different stages along this technology journey and those who want a more personal experience.

Meeting customer needs for journey planning and information

Our passengers want to be able to access information when and where they require it without becoming overwhelmed. This can be at a number of stages along the passenger journey:

- when they are planning/researching their travel
- when they book their airline ticket
- after they book but before they start their travel
- during their travel
- immediately before they want to use surface transport
- during their surface transport journey.

Our challenge is to cater for all of these options.

Our new passenger onward travel leaflets all feature QR codes so they can be accessed and stored on smartphones



TRAVEL CHOICES NORTH



TRAVEL CHOICES EAST



TRAVEL CHOICES SOUTH



TRAVEL CHOICES WEST



TRAVEL CHOICES LONDON



TRAVEL CHOICES LOCAL

Planning their journey

Passengers are travelling to a destination, so rather than providing information about trains, buses, coaches, car rental and taxi; we will focus our approach on providing information about how to travel to destinations and then the transport choices available when they get there.

Central to this is the online journey planner provide by Transport Direct (a government funded website) available on the Gatwick Web Site. This allows the passenger to personalise their journey and provide them with the choices available for door-to-door travel for both public transport and car journeys.

This gives empowerment to the passenger allowing them to decide their own journey, optimize their route and manage costs. It also keeps it simple, make it easy for passengers to understand and make decisions themselves.

In 2012, we introduced new destination based information for arriving passengers, which are located on a passenger's arrival journey. For passengers who have smart phones, a smart code is available for people to swipe and download the information as well as on line. As technology and the use of it becomes more common place we would expect the number of hard copies of information to reduce and the use of smart codes to increase.

Additional information will be available in a number of different formats by downloading from smart codes, apps, on line and in hard copy. Information is also provided by many transport providers. Our challenge moving forward is to embrace new technology as it arrives to ensure an improvement in the information for passengers.

In 2012, Gatwick improved its web site to embrace the latest form of technology. One of the features is a new travel hub where passengers can access relevant and timely surface transport information. At the same time the airport launched its mobile web site. During the life span of this ASAS we would expect a number of significant upgrades to the way in which we communicate.

During times of disruption passengers want and require information about their travel arrangements. We will work with all travel providers to encourage them to provide information relevant to individual passengers that can either be 'pushed' or 'pulled'.

Paying for travel

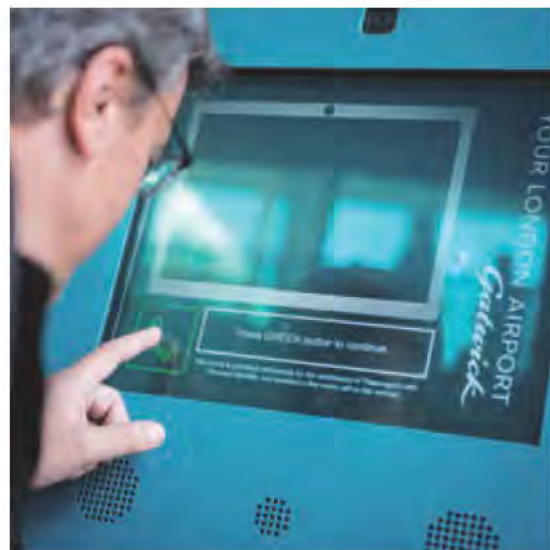
It is estimated that 65% of public transport users arrive by air at Gatwick having not bought tickets for their onward journey. This creates inefficiencies in the use of space in the airport, the railway station, and passenger transport interchange areas; resulting in queues, a poor experience and longer journey times for passengers.

Many transport providers allow you to book online beforehand and a number have commercial agreements with airlines that enable surface transport tickets to be bought at the same time they purchase their air travel, or on board the aircraft. At the moment the tickets are provided in a variety of means - bar codes or actual tickets

Our challenge will be to work with both the airlines and surface transport providers to increase the number of pre-bought tickets and enhance the way in which passengers can pay for their travel - embracing the new changes in technology which are now starting to appear such as NFC (Near Field Communication) which allows payment by phone, Wi-Fi on aircraft etc. Only in this way can we achieve true seamless integration, improve passenger experience and reduce queues.

Many organisations are also developing ticketless travel. However, to be truly integrated there needs to be a common industry standard which will allow passengers to travel between modes without having to change to a different make of technology.

Equally in some cases passengers are faced with an array of transport products to choose from, especially in the case of rail. For any passenger this creates issues, but for foreign visitors this can affect their whole journey experience and creates unnecessary queues. The transport industry does recognise this as an issue and a major feature of the ASAS and of the Forum will be to 'keep it simple' for the passenger.



Customer service

Customer service provided by employees can often be a key deciding factor for a passenger as to whether they feel that they have had a great experience. This includes drivers, ticketing employees, cleaners and baggage assistants, and any other person with whom the passenger comes into contact. At Gatwick our principle is that it does not matter who the member of staff is when a passenger asks for assistance, anyone should be able to help.

However, we do recognise that different passenger groups and individual passengers will require a different level of assistance. This will be a key area we will work on with all airport partners, informing them about surface transport as well as information about the Airport.

To help drive customer service and improvements, in 2012 we introduced Quality Service Monitoring (QSM) for all forms of transport to and from Gatwick as well as the facilities passengers use. Passenger feedback is gained on a regular basis. Using this information we have set targets for the quality of the area using a scale of 1-5. The QSM scores will be a fundamental measure we will use to reduce 'irritation for passengers' and improve the overall experience.

Allied to this will be to 'live the lives' of our passengers by regularly reviewing their journey experience, 'unpacking it' and working to resolve the 'irritation' points through innovation. To achieve this we will bring together the key stakeholders in small working groups.



Finding their way

In 2011 and 2012, we have focused on wayfinding throughout the terminals and the surface transport areas. This will be an on-going process which will need continual review through future development phases at Gatwick.

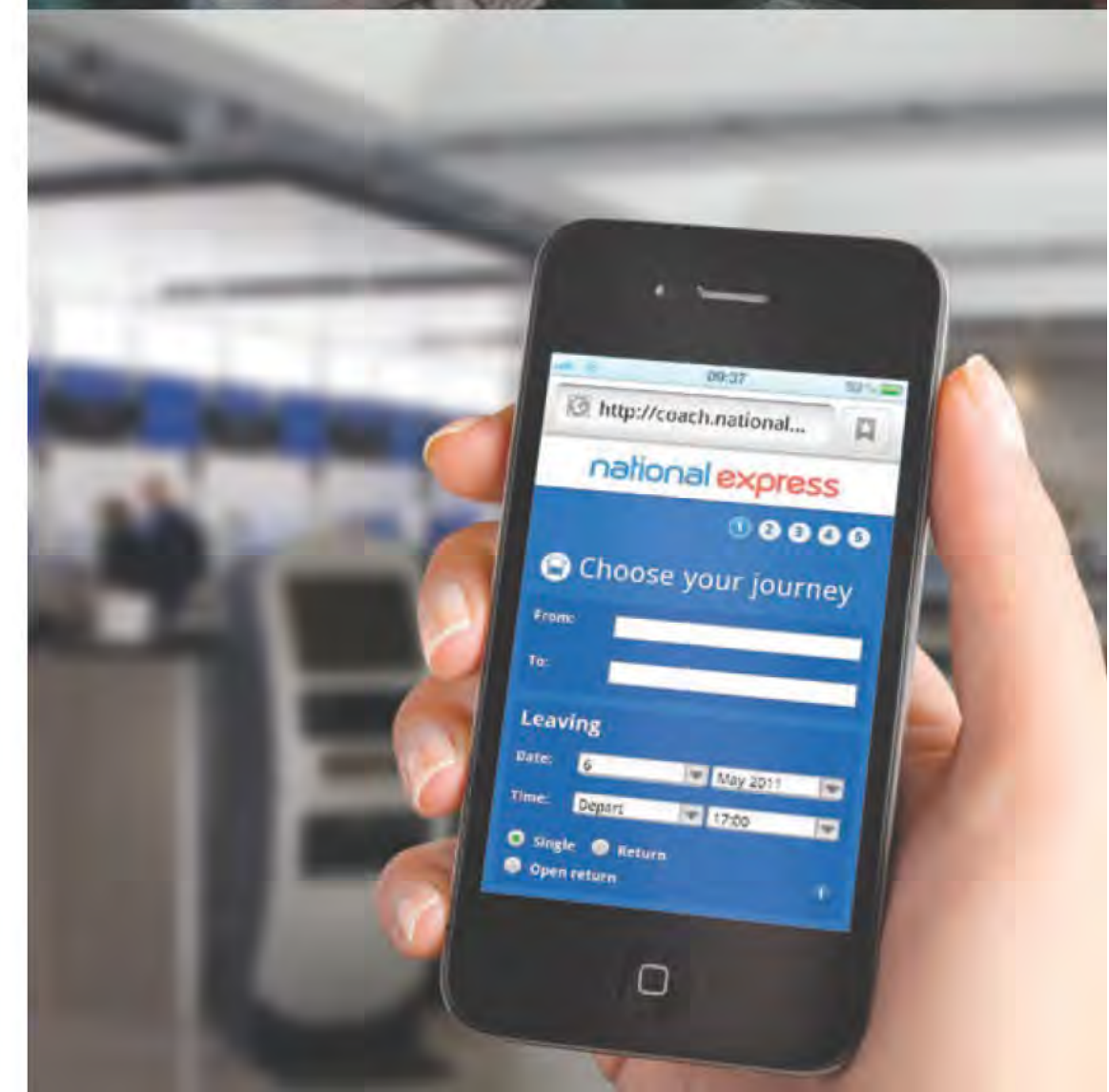
In developing this, we will also look towards concepts that show passengers through their hand held devices where they should be going to provide familiarisation for their journey. This technology is now being rolled out across major railway stations in the UK and we will investigate how this can be applied at Gatwick.

PLANNING TRAVEL

STRATEGIC PRIORITIES

To deliver the best passenger experience by:

- working with surface transport providers and airlines to deliver a seamless passenger journey experience using 'user centric' design and innovation
- providing the relevant information, in the format they choose, that allows passengers to make decisions best suited to their needs.



THREE



CONNECTED

Gatwick is a Transport Hub, where a large range of transport modes connect. It acts as both a destination and an interchange for passengers. Our hub has to perform a variety of functions to meet passengers needs. In the following sections we have reviewed how we will deliver these through the transport services and infrastructure operating within our Transport Hub. For each we have set the strategic priorities for the future.

The Gatwick Transport Hub

All surface transport modes come together in one transport hub at Gatwick enabling interchange and access to the airport and the wider community. Due to the very nature of the airport, the hub is spread across a wide area of the airport, but is focused around the North and South Terminals. On-going infrastructure capacity and security constraints have been the key determinants of where facilities have been located.

South Terminal

The Gatwick Airport Railway Station is located at the South Terminal, along with access to stops for local buses which are accessed directly from the Terminal concourse - there are separate stepped and lift access points from different parts of the Terminal building, which lead to local bus stops. The South Terminal surface transportation area is accessed by road via the M23 roundabout at Junction 9A of the M23. A ring road system leads to the long stay and short stay car parks and the main passenger transport interchange area.

From the South Terminal the short stay car parks, on-airport taxis, car rental and bus and coach facilities are accessed by two covered walkways with travelators which lead to the Upper Forecourt. The Short Stay car parks (including passenger pick up by private car), on-airport taxis, and buses to the on-airport Long Stay car parks are all located here.

Lifts, ramps and escalators allow access to the lower forecourt where bus and coach, car rental and PRM drop off facilities are located. Facilities for passengers being dropped off by private car are on the two outer lanes of the lower forecourt. The car rental back up facilities are also located in the South Terminal area.

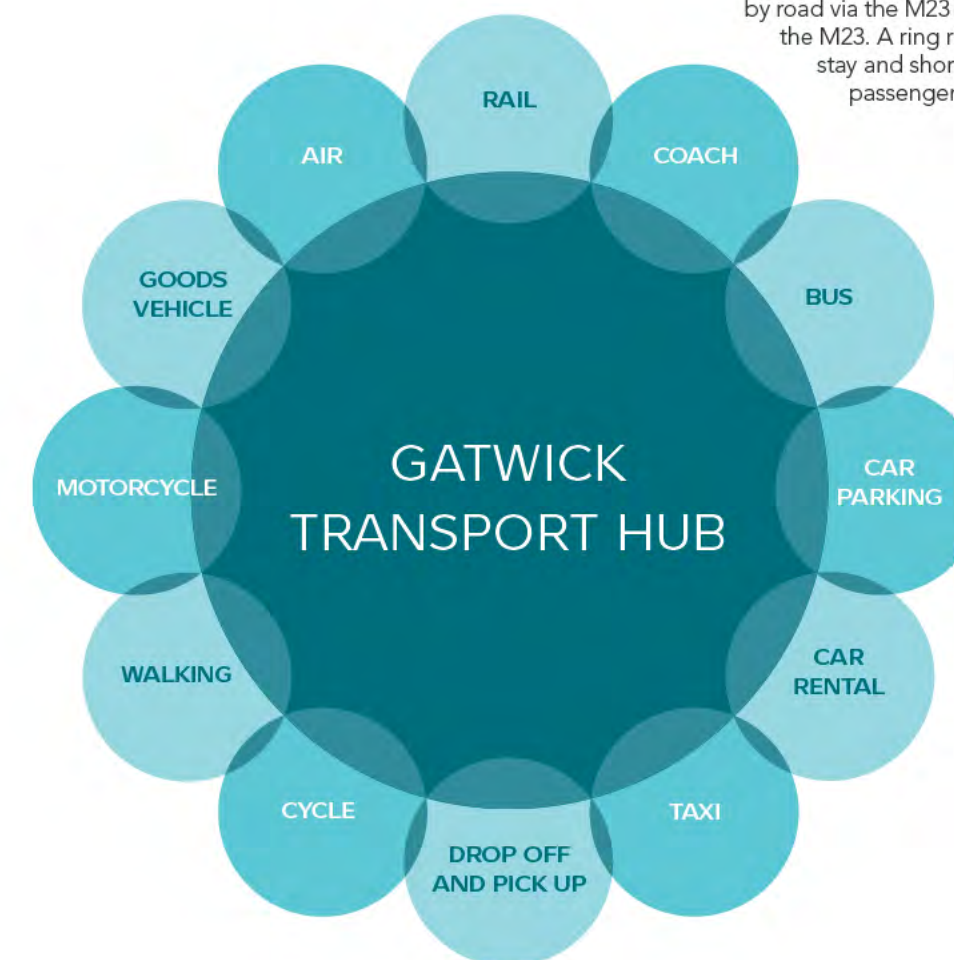
North Terminal

The North Terminal is accessed by road from the A23 (Airport Way). A ring road system leads to the Short Stay car parks, Furlong Way, Northways and the Forecourt. The Long Stay Car Park is located along Ring Road North, from the A23 Airport Way junction with the North Terminal.

At the North Terminal, facilities for on-airport long stay car park buses and some of the scheduled express coach services are located on the inner forecourt. Other facilities for buses and coaches are located along a covered walkway along Furlong Way. The Short Stay car parks also house the car rental area, as well as areas for passengers being picked up by private car. Facilities for passengers being dropped off by private car are located on Northways. Access to the Terminal is via travelators or lifts from Northways. The railway station is accessed via the Shuttle to the South Terminal.

One of the primary benefits of having duplication of facilities (except for rail) at both terminals is that it provides parity for passengers and reduces the distance they have to travel to make onward connections. However, this does bring with it complexity and require careful balancing of demand for space.

In the following sections we have set out how the Gatwick Transport Hub will be connected by rail, bus and coach, car (car parking and pick up/drop off), taxi and car rental as well as the infrastructure required for each. For each we have created a vision of how passengers may travel in 2030 which was a key outcome of our Vision Workshop.





CONNECTED

RAIL SERVICES

The importance of rail

Gatwick is London's and the UK's best connected airport by rail with direct train services to over 120 stations. The Airport and its airlines place great emphasis and importance on its rail connectivity and we believe that the priorities we have set out in this ASAS for rail will deliver an additional 3% modal shift to rail by air passengers. With great connectivity, the key issues are now about capacity, quality, accessibility and passenger satisfaction.

Gatwick is committed to securing improvements to rail services that meet the needs of both air passengers and commuters whilst also adding value. Connectivity to London is especially important for business and Gatwick Express is an essential element of this contributing the majority of rail journeys between Gatwick and London. Improved connectivity to the wider South East Region, particularly the Thames Valley and Kent, is also important for Gatwick's future growth. Gatwick Airport railway station caters for air passengers, airport employees, the local community, commuters and business passengers. Growth in commuter and air passenger markets on the Brighton Main Line is equally important to the South East economy.

In 2012, Gatwick developed its Rail Strategy to ensure that the UK's busiest rail network and its second largest airport, Gatwick, are properly integrated, supporting both the UK's future international connectivity, and the needs of the every-day commuter. It outlined that there is a clear rationale for delivering value and efficiency in future rail franchises and network planning. It also builds on the South East Airports Taskforce's view that rail and airport operators must work in partnership with Government to secure high quality surface access to and from airports.

The Gatwick Rail Strategy can be delivered through a partnering approach between the airport and rail industry stakeholders and supports some of the main themes detailed in the 2012 Government Command Paper on Reforming our Railways and in HLOS2.

Rail accessibility to the airport has been central to activities at Gatwick since 1958, when the station on its present site was opened. Although there will always be an emphasis on links to London, the wider connectivity by rail across the South East and to the South Coast is an enviable asset for local

business and the regional economy. In order to achieve the sustainable development of the airport, we believe there are opportunities to expand on existing connections to achieve greater mode shift to rail for air passengers, commuters and airport employees.

Although having a railway station adjacent to the South terminal is a distinct asset, the current service quality, and the impact of future changes to the main commuter line on which it sits, raises issues that must be addressed to secure future growth.

Current issues for commuters and air passengers travelling by rail indicate the need for investment in rail surface access to Gatwick. This is through long term planning for the Gatwick Express and the Brighton Main Line to complement the new Thameslink Franchise and the committed rail enhancements.

This is integral to promoting the air passenger experience, maintaining business confidence for growth in air travel and for wider growth in demand for rail travel to be sustained.

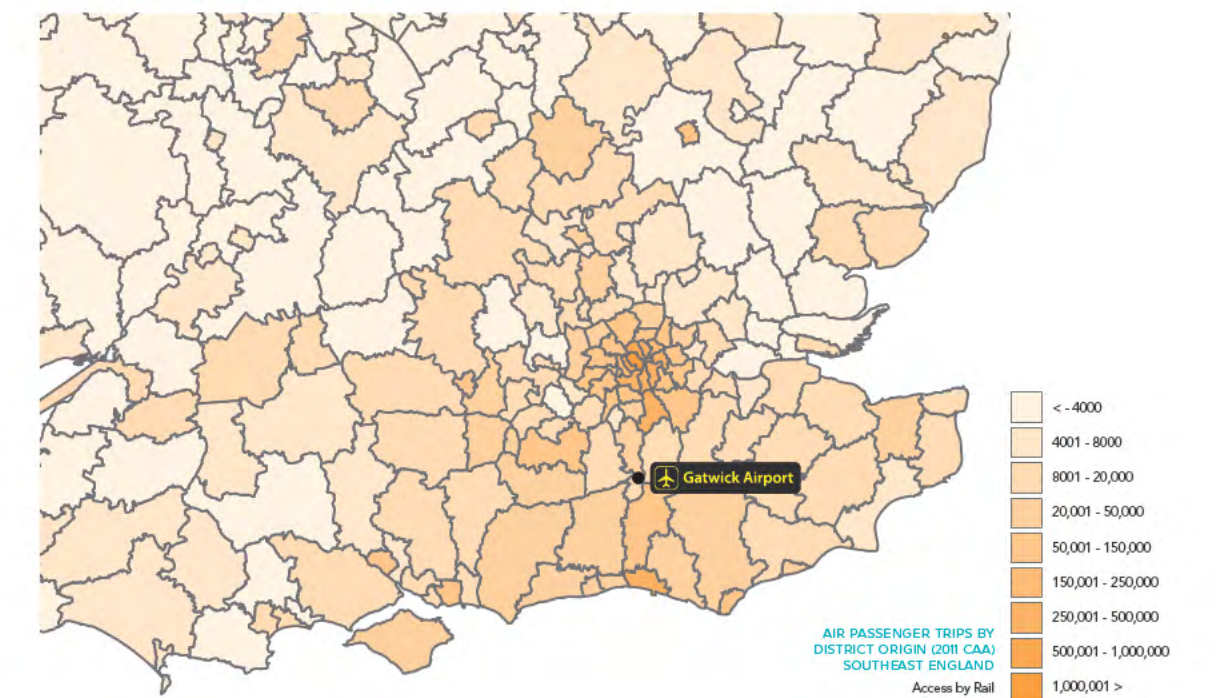
Passenger trends

In 2011, 35.5% of air passengers and 11% of employees used rail for their travel to and from the airport. London is the dominant rail destination for our passengers, and the main catchment area is the wider southeast (Figure 18). Through the use of CAA data for rail passengers accessing Gatwick we know that:

- 80% of people are travelling for holidays, visiting friends/families and 20% on business
- 61% are UK residents, 39% are non UK.



FIGURE 18 RAIL AIR PASSENGER ORIGINS BY DISTRICT





Rail services in 2012

Gatwick is London's best-connected airport by rail with over 120 railway stations directly connected. 360 trains a day travel between the airport and the capital, serving over 13 million passengers annually, more than any other UK airport railway station (Figure 19) and 10% more than in 2009. Year on year the demand is increasing and hence the demands placed on the railway station continue to grow.

The following services currently operate to and from London:

Gatwick Express non-stop to Victoria every 15 minutes, journey time 30 minutes:

- the service operates to London Gatwick from 03:30 and from Gatwick until 00:32 and premium fares apply
- since 2008 northbound trains departing Gatwick between 0700 and 0900 in the morning and southbound trains leaving London Victoria between 1730 and 1900 have been extended to Brighton. Whilst this has reallocated capacity to improve connections to the South Coast, it has had a detrimental impact on the capacity available for air passengers especially in the morning when the air and commuter market peak simultaneously
- originally a separate rail franchise, Gatwick Express was merged with Southern in 2008
- the overall satisfaction by passengers has fallen from 90% in 2007 to 80% in 2012 (National Passenger Survey), although passengers continue to highly value its direct nonstop service.

Southern Trains to Victoria via East Croydon and Clapham Junction:

- 4 trains per hour, journey time 34-53 minutes. Trains have a mixed stopping pattern, generally including Horley, Redhill, East Croydon and Clapham Junction with some adding up to a further five intermediate stops.
- these trains originate from the South Coast and have limited capacity by the time they reach Gatwick.

Southern Trains additional trains to London Bridge:

- peak periods only (six arrivals at London Bridge between 0714 and 0906, four arrivals at Gatwick Airport between 1749 and 1919).

First Capital Connect (FCC) to London Bridge, St. Pancras International and Bedford via the Thameslink cross-London route:

- this operates 4 trains per hour, journey time 28 minutes to London Bridge providing additional access at Blackfriars, Farringdon and City Thameslink direct to the City. It also connects to the East Coast Main line at St Pancras.

First Capital Connect (FCC) to Reading:

- this operates an hourly service to Reading via the Thames Valley as well as some intermediate stations along the route.

Regional connections in 2012

Aside from the Gatwick Express services extended from and to Brighton in the peaks (morning inbound to London and evening outbound from London) most other southbound services calling at Gatwick Airport station also continue to locations on the South Coast. This gives direct services to places as far as Portsmouth Harbour and Southampton via Horsham, Littlehampton via Hove and Worthing.

There is currently no direct east-west connection between Gatwick and Kent.

Thameslink services operate via London Bridge and St Pancras to Luton and Bedford. These are through trains from Brighton. Although the direct connections are currently limited to these destinations, wider access is possible via interchanging at St Pancras International railway station include East Midlands Trains services to South Yorkshire and the East Midlands. The completion of the Thameslink investment programme will also provide new infrastructure that will allow direct connections to Peterborough and Cambridge from St Pancras and it is anticipated that services to these new destinations, currently served via Kings Cross, will operate to Brighton via Gatwick Airport.



Importance of Gatwick Express

Gatwick Express is a premium service that carries around 50% of all rail journeys to and from Gatwick and over 60% of all rail journeys between London and the airport (Figure 20). Rail travel is up to 50% quicker in the peak than car, taxi or bus options to London. For rail trips to the City of London Business District, Gatwick Express accounts for around 71% of passengers. Rail also carries 97% of all City of London business passengers travelling to the Airport.

Gatwick Express passengers contribute around 40% more revenue (via premium fares) than commuters. This equates to extra revenue in excess of £27 million per annum, which reduces the subsidy payments and directly contributes to the Government's objective to reduce rail's cost to the taxpayer.

Its importance to Gatwick Airport's future growth and the UK economy cannot be underestimated as rail connectivity is a key factor in an airlines decision to choose Gatwick.

However, recent passenger survey results (Figure 21) show how the quality of key aspects of Gatwick Express falls behind equivalent services to Heathrow and Stansted (whose performance has improved with new rolling stock).

The Gatwick Express has been compared with 36 international city centre airport rail links over a number of characteristics. The study has shown that the following points are key:

- Rolling stock design
- Market segmentation
- Fare revenue
- Journey time/stopping pattern/frequency
- Customer focus and marketing
- The importance of having dedicated rail links.

FIGURE 20 RAIL PASSENGER JOURNEYS TO LONDON (CAA 2011)



FIGURE 19 RAIL PASSENGER NUMBERS BY LONDON AIRPORT (CAA 2011)

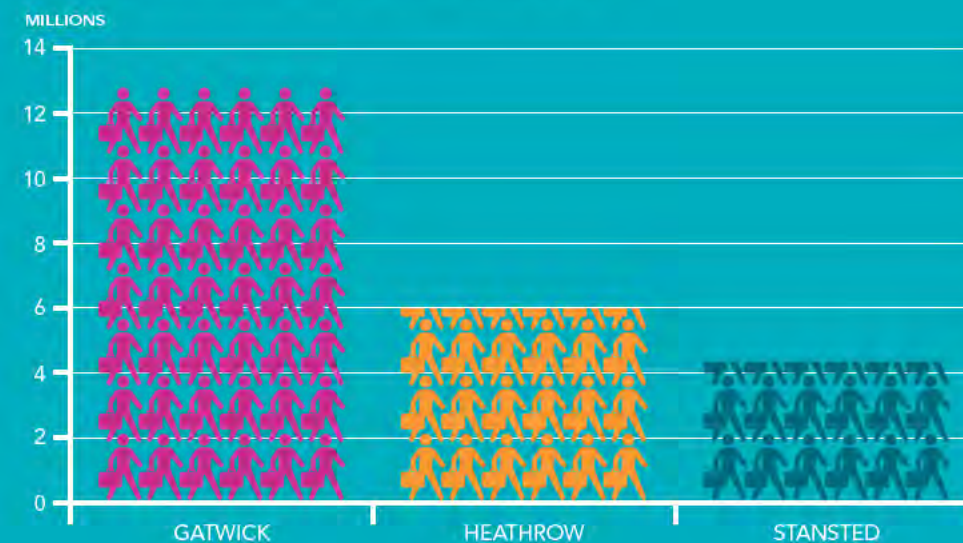
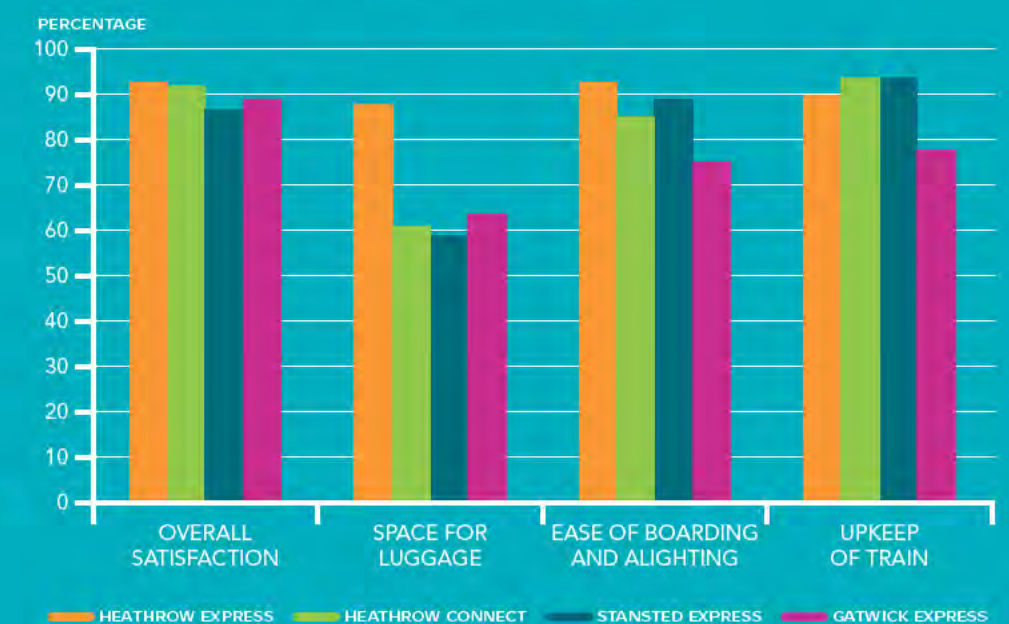


FIGURE 21 PASSENGER SATISFACTION WITH LONDON AIRPORT RAIL SERVICES





Rolling stock design

Dedicated airport services typically have trains designed for air passengers with luggage (step-free access, wide vestibules and aisles and visible baggage racks), have wide doors at one third and two thirds positions, simple passenger communications systems (e.g. Hong Kong's route display, Heathrow Express TV and Oslo Flytoget TV) and medium density seat layouts.

Gatwick Express's Class 442 rolling stock does not compare favourably with other airports' city centre rail links as they do not provide the facilities needed to cater for air passengers particularly in terms of access and luggage capacity (Figure 22). This is particularly important for passengers with reduced mobility. Peak service extension to Brighton means that trains are already crowded in the morning peak on arrival at Gatwick.

Market segmentation

Gatwick achieves a higher rail share overall than other airports due to the combination of a dedicated express rail link and regional rail services serving Gatwick. This is despite a lower proportion of foreign resident passengers, most of whom do not have access to cars, than comparators such as Munich and Amsterdam.

Fare revenue

Air passengers are willing to pay extra for a premium product and, with a high value of time, are insensitive to price changes. The loss of a premium airport express rail link would result in a loss of rail share. If the Gatwick Express disappears so that premium fares cannot be charged, rail share will not increase (and may actually decline) and the revenue will be lost, requiring more taxpayer subsidy to the rail industry.

Journey time, stopping patterns and frequency

Highest rail shares are achieved at airports with short, high frequency metro-type services (Tokyo Haneda, Zurich and Copenhagen) suited to air passengers. When the airport is further from the city (like Gatwick), higher speed rail services are necessary to attract air passengers.



Platform use

Many of the dedicated airport rail services use a dedicated departure platform. This provides certainty to the passenger who is directed to the (only) train on that platform, either at the airport or the terminus. This also creates a 'virtual waiting room'.

Customer service

Air passengers are very different from commuters and other regular travellers. They are anxious about the rest of their journey, may be in a foreign country, have baggage and are taking a rail journey as part of a longer air trip. Customer service requirements are therefore very different from other rail passengers. Key requirements are direct contact with staff, foreign language announcements and an understanding of the rail transport network and its workings.

Marketing

Dedicated airport rail links focus on the air passenger, recognising customers' choice of airport, access mode and lack of familiarity with language, geography and travel environment. Products are designed with the whole journey in mind. Complex rail services deter international visitors from choosing public transport. With recent growth in foreign business and leisure travellers to Gatwick, ease of use of the rail service by the international traveller will be critically important.

Branding is a key factor, with the fact that the train, signage, advertising and promotional material is clearly and distinctly marked as the 'Airport' service providing an easy route for the international air passenger through the stages of the journey.

FIGURE 22 INTERNATIONAL BENCHMARKING OF THE GATWICK EXPRESS

	STEP FREE ACCESS	WIDE DOOR ACCESS	LARGE RACKS FOR LUGGAGE	INFORMATION DISPLAYS
Heathrow Express	✓	✓	✓	✓
Hong Kong Airport Express	✓	✓	✓	✓
Kuala Lumpur KLIA Ekspres	✓	✓	✓	✓
Stockholm Arlanda Express	✓	✓	✓	✓
Gatwick Airport	✗	✗	✗	✓

Rail services in the future

In the short term our Rail Strategy is focussed on working with the Rail Industry to maximise the use of existing capacity and infrastructure to ensure the best possible passenger experience. However, the introduction of the Thameslink Programme, the Thameslink Franchise and the new Great Western Franchise will bring significant changes to rail services and how people use them.

Thameslink infrastructure programme

The Thameslink upgrade will improve connections to areas north of London with new half hourly services to Cambridge and Peterborough. The number of services to central London will also double. Gatwick will gain the following benefits from Thameslink improvements:

- new rolling stock with more capacity and longer trains
- consistent peak and off peak service to a transformed London Bridge station
- good interchange with Underground and Crossrail services at Farringdon
- more direct or 'one change' access to destinations.

Thameslink franchise

The combined Thameslink, Southern and Great Northern Franchise will be the biggest franchise the Government has let and will bring together all of the services currently operated by two franchisees: First Capital Connect (FCC) and Southern Railway (including Gatwick Express). The new Thameslink, Southern and Great Northern Franchise was, at the time of writing, scheduled to bring the services operated by First Capital Connect in 2013 and by Southern in 2015 (Figure 23). These dates may be subject to change pending the on-going review of the franchising system announced by the Secretary of State for Transport. It is possible that following this Franchise, a longer term contract may be issued.

The Franchise will be responsible for delivering rail services across Bedfordshire, Cambridgeshire, Greater London, Hampshire, Hertfordshire, Kent, Norfolk, Surrey and Sussex.

At the core of the specification for the Franchise are:

- performance and reliability
- improving customer experience
- introducing Smartcards
- approach to ensuring connectivity with other transport modes.

Within the DfT Consultation on the Franchise issued in May 2012, it is indicated that some work had been done on this timetable 'by the rail industry and that one of the conclusions emerging was the specification of direct services to each London route (Victoria, London Bridge and Thameslink core route) must be maintained from the busiest stations on the Brighton Main Line (BML)'. This also includes Gatwick Airport.

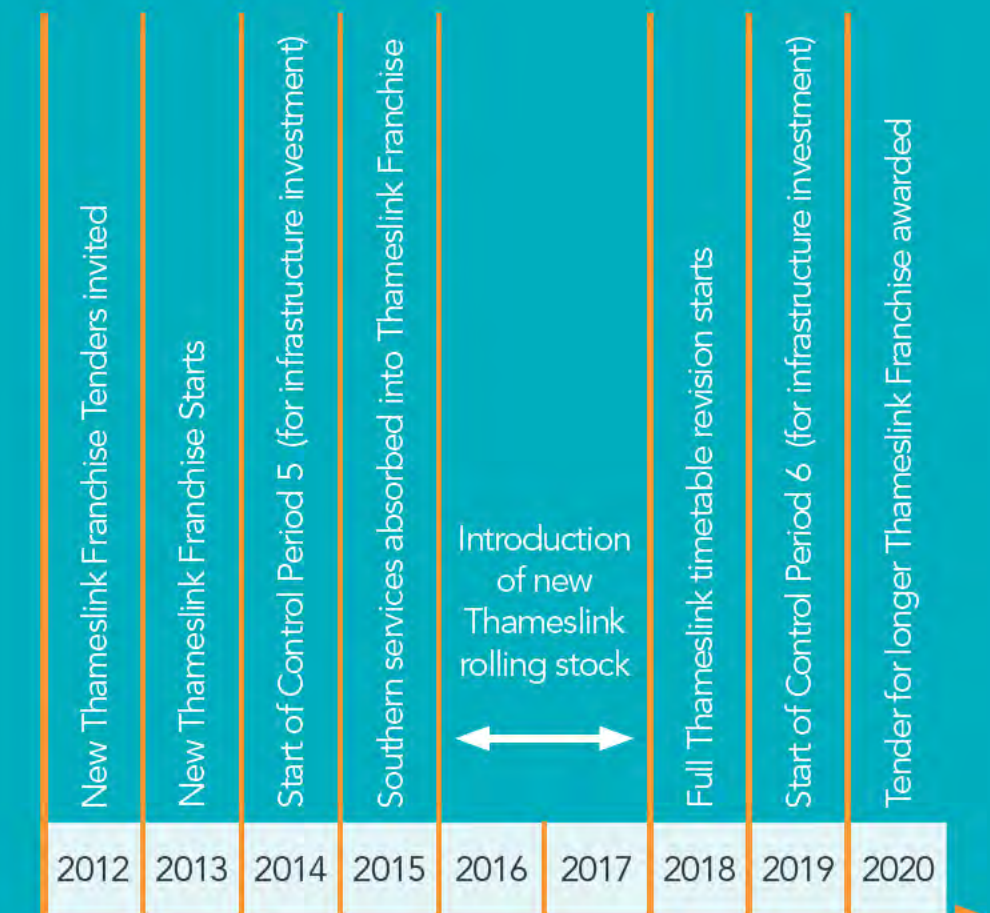
It adds 'In order to ensure a sensible pattern of services can be achieved for stations south of Gatwick both to and from Victoria, it may be necessary to make greater use of the practice of operating the non-stop Victoria-Gatwick services (Gatwick Express) as through trains to and from Brighton. This may be best achieved by restoring the practice of detaching (southbound) and attaching (northbound) a portion of the train so that airport passengers can have more time to alight from the train (southbound) and to join (northbound). This work has not yet concluded yet, and alternative options are being examined.'

With regard to air passenger services the consultation set out that 'The Government believes good connectivity with our major airports is essential. This franchise serves two airports: Gatwick and Luton. If possible we would like to see improvements in these services. However, whether we can deliver such improvements depends on affordability and on striking the right balance between the needs of air passengers and those of commuters in relation to how we use limited capacity on lines which are amongst the busiest in the country'.

The franchise will also open up the opportunity to develop airport related rail products to the City of London via London Bridge, Farringdon and St Pancras/Kings Cross.



FIGURE 23 THAMESLINK FRANCHISE TIMETABLE





In line with this Gatwick has committed to engage with Government and the rail industry to seek the following outcomes for both the 7 year and the longer term Thameslink Franchise:

- investment, as part of the Thameslink franchise process, in a premium non-stop Gatwick Express rail service
- engagement on a balanced plan for growth with an industry enhancement plan for the Brighton Main Line
- engagement with the DfT, Ministers and business on how Gatwick's economic value can be used to demonstrate the importance of growth
- invite discussion with franchise bidders on opportunities to maximise rail mode share, optimise revenue and minimise subsidies
- be proactive in supporting an industry plan for enhancing the Brighton Main Line as a win-win for commuter and air passenger growth
- continue to liaise with the South East business community and Local Authorities to deliver improved rail surface access in support of sustainable growth.



The benefits from taking a holistic approach to the Brighton Main Line services and associated rail services into Kent and the Thames Valley include meeting key policy goals and gaining significant wider economic impacts for the south-east.

- it will meet the needs of air passengers, which is consistent with Government policy on sustainable transport, sustainable aviation and getting best value for the UK rail network. It supports the network strategy outlined in the recently published Rail Command Paper which

includes improving those journeys that matter most for economic growth including links to international airports

- it will support Gatwick's growth plans thereby helping to maintain and grow the UK's international competitiveness and the contribution the airport makes to the economy of London and the south-east
- higher quality trains and passenger experience will help support a premium fare thereby optimising the revenue contribution.

Improving east-west connectivity and linking towns to business opportunities associated with Gatwick is a priority for the Gatwick Diamond Business Area and communities across West Sussex, East Sussex and Kent, to maintain a low rate of unemployment and provide access to high value jobs.

Great Western Franchise

The Great Western Franchise has a dispersed pattern of services with a number of key interchanges. For Gatwick Airport the point of connection is Reading.

The new Great Western Franchise was expected to commence in April 2013 for a 15 year term and will be based on the services presently operated by First Great Western (FGW), with some elements transferring to the new Crossrail operator.

There is a requirement for bidders for the new Great Western Franchise to provide two trains per hour on a standard pattern between Reading and Gatwick Airport, with the potential remodelling at Redhill to facilitate this.

The Great Western Rail Utilisation Strategy recommends that the second hourly service to Gatwick Airport from the North Downs line should be included as an option in the post Thameslink Franchise timetabling work on the Redhill corridor.

The completion of the Reading Station Area Redevelopment will also incorporate a new, grade-separated underpass to the east of Reading station. This will permit the linkage of train services from west of Reading with the Gatwick Airport route, allowing direct services to Oxford for example.

These linkages could increase the connectivity to Gatwick westwards significantly.

RAIL SERVICES

STRATEGIC PRIORITIES

To help our airlines to grow and to deliver the best passenger experience by working with the Rail Industry to;

- ensure the retention of a non-stop dedicated premium Gatwick Express Service
- secure higher quality Gatwick Express rolling stock from the new Thameslink Franchise to improve the passenger experience
- ensure sufficient capacity for air passengers to board trains, with their luggage, in the peak hours
- balance the benefits for air passengers and commuters when the new Thameslink Franchise 'acquires' Southern in July 2015 and the franchises beyond this period
- promote the use of integrated smart ticketing and a common industry standard as a tool for making best use of on-train capacity, and rail station capacity
- work with the train operator to ensure that the airport to rail passenger experience is of the highest quality for all categories of passenger, noting that they may have different requirements
- study the business case for new and improved rail services to Kent, the Thames Valley and Surrey in the context of future franchise requirements and capacity between Redhill and Gatwick Airport
- promote the increased use of rail services through innovative marketing campaigns in the existing rail corridors where a high number of 'kiss and fly' trips originate.

The rail infrastructure which supports the rail services serving Gatwick is comprised of the railway stations, the tracks and associated facilities, both at Gatwick and beyond. The airport railway station primarily caters for air passengers and employees working at the airport. However over 1 million commuters also use the railway station to commute to London and to access employment located just outside the airport boundary. Air passengers provide different demands to commuters on the railway station due to the amount of heavy baggage they have, being unfamiliar with the station and how it operates, having rarely used it before as well as many not speaking English well. It is the mixing of the air passengers and commuters which creates challenges for the rail industry.

The successful Thameslink Franchise bidder is expected to take over control of the airport rail station in 2015.

Airport Railway Station

Station concourse

The Airport Railway Station is located adjacent to the South Terminal and the station concourse is accessed directly from the Terminal. Ticketing facilities are concentrated on the station concourse (also in the arrivals area in the South Terminal) along with information displays, customer service and retail facilities.

In 2011, 13.128 million passengers per annum used the airport railway station of which 1.14 million were rail to rail passenger interchange journeys.

As part of the Southern Franchise, gates were introduced on the station concourse in early 2012 (as part of revenue protection element of their franchise), which passengers are required to go through before they access the platforms. This proposal was strongly objected to by GAL and a number of key stakeholders as it provides a poor passenger experience. Gates also exist at passenger terminating stations such as London Victoria and on the exit route for passengers arriving at Gatwick. The gates also create pinch points where queues can build up. Long queues also build up at peak times at the ticket machines and ticket desks.

One of the key recommendations of the Gatwick Rail study was the use of smart technology/ ticketing and innovation to make the gates more air passenger friendly.

CONNECTED

RAIL INFRASTRUCTURE



Platform capacity

Gatwick Airport Railway Station currently has six platforms, with a seventh under construction. The seventh platform should be completed by the end of 2013 along with new access arrangements from the concourse. This is part of a £53m enhancement project by Network Rail. Gatwick has contributed £7.6m from the passenger transport levy to this project. The first part of the project has seen concourse improvements and later the project includes delivery of the additional platform, track and signalling upgrade and more lifts and escalators giving improved access to Platforms. These works will improve railway track capacity, train reliability and passenger experience.

Currently the Gatwick Express services are located on Platforms 1 and 2 and Platforms 3-6 are for all other services for London and the South East. When platform 7 becomes operational the Gatwick Express will be located on Platforms 5 and 6 with platform 1-4 and 7 accommodating all other services. The principle will be to always have a Gatwick Express train on the platform acting as a 'virtual waiting room'. This will help to maintain the passenger's premium service and travel experience.

The way in which the whole rail station operates and interacts with air passengers needs to recognise their requirements of having: additional bags, of being unfamiliar with how it operates and with limited English language knowledge.

As part of the overall project Network Rail have modelled how the Platforms will be used in the future. This shows that in over 10 years' time, some

additional platform capacity works may be required. However, following the opening of platform 7, the way in which passengers use the whole station will need to be surveyed and monitored. GAL is committed to working with Network Rail and the train operating company (TOC) to achieve a high level of passenger experience and effectively plan for the future.

Accessibility

Gatwick operates a service for passengers with reduced mobility (PRM) to assist them with their journey through the Airport either from their surface transport mode or to their surface transport mode.

At the railway station the passenger will be taken to the customer service information desk where the TOC will provide them with assistance to the train. However, for passengers requiring lift access to platform 5 and 6 they are required to go back out of the main station concourse and gain access to the lifts from the exit route from the rail station.

Step free access from all of the Platforms is not provided, creating difficulties for any passenger requiring assistance, or families with push chairs or any passengers with large baggage. We will strongly encourage the TOC responsible for the station to make it fully accessible and to look at innovative ways for doing this.

We will continue to work very closely with the TOC's to ensure that passengers' journeys are fully connected with the airport and provide a great experience regardless of mobility.



Connecting to other railway stations

There are a number of major infrastructure projects currently underway where services from Gatwick make direct connections. These are:

- **Thameslink:** A £6 billion Thameslink Programme is currently underway which will upgrade and expand the network, providing longer trains with greater capacity, more destinations and better stations with direction connections to Gatwick.
- **Crossrail 1:** Crossrail is a major new east-west fast rail link under central London, also due for completion in 2019 and beyond, Crossrail incorporates a connection at Farringdon on the Thameslink network directly linked to Gatwick Airport.
- **Farringdon:** Farringdon Station will provide the only nexus linking Thameslink, Crossrail and the London Underground, consequently becoming one of the country's busiest interchange stations.
- **London Bridge:** As part of the Thameslink upgrades, London Bridge Station will also undergo a major transformation in a Masterplan project that will create a new London Bridge Quarter comprising commercial and residential development less than 30 minutes from Gatwick.
- **Victoria Station upgrade:** In order to provide a lasting solution to this heavily congested station a major upgrade of the station is planned. This will include a new northern exit/entrance on the north-west corner of Victoria Street which will be accessible via a new additional ticket office under Bressenden Place that will lead to both the Victoria Line and the Circle and District Line platforms. This upgrade is due by 2018. The work will also enlarge the existing Victoria Line ticket hall serving the railway station and new escalators.

Long term infrastructure improvements

Within the horizon of this ASAS, we believe a fundamental rethink of the Gatwick Airport Railway Station is required and GAL is committed to working with the Rail Industry to achieve this.

Away from the airport, the committed investment with Crossrail, Thameslink and the London Underground upgrade programme will boost capacity over the coming decade by around a third. But even with this investment, demand on rail and Underground services within the life of this ASAS is set to outstrip capacity.

Within the Gatwick Rail Study we identified that there needed to be a clear investment plan proposal for 2019-2024, that will mitigate the key constraints, including London Victoria and East Croydon to provide capacity for future growth and enable a significant timetable change to cater for growth in air passenger and commuter numbers

The Mayor's Transport Strategy also identified a number of priority projects to meet future needs. These range from incremental improvements to existing infrastructure, through significant enhancements to key pinch points on the network, to a major new SW-NE line, Crossrail 2, based on the long safeguarded Chelsea-Hackney route. The Victoria Underground Station is on this line. Transport for London (TfL) is currently engaged in a programme of work to reassess this proposal. However, it is recognised by many that Crossrail 2 could provide a step change in SW-NE London transport capacity.

It is particularly relevant for Gatwick as neither Crossrail 1 nor Thameslink provide substantial relief for a number of sections of tube lines as well as key interchanges such as Clapham Junction and London Victoria in the 2020's.

London First has identified that 'a Crossrail 2 scheme through the central section would also offer scope for interchange with Crossrail 1, Thameslink and HS1, and thus offer enhanced connectivity to international air and rail links'.

From our surface access models, we would expect all of the measures indicated for both rail services and infrastructure to increase rail mode share by an additional 3% in the long term, if they are implemented. We would expect the majority of this mode share to come from the private car drop off/pick up category.



RAIL INFRASTRUCTURE STRATEGIC PRIORITIES

Help our airlines to grow and deliver the best passenger experience by working with the Rail Industry to:

- ensure the Gatwick Airport Railway Station enhancement project including Platform 7 is completed in 2013
- monitor existing and future station capacity for the Gatwick Airport Railway Station and to explore new opportunities to provide a substantial step change in the facilities at the station
- work with the train operator to utilise standard smart card technology to improve passenger access and achieve removal of gates for the Gatwick Express Service
- work with the train operator to ensure that the Station and its platforms deliver a seamless passenger experience and are fully accessible for all categories of passenger
- to support the development of Crossrail 2, which will provide strategic capacity improvements for London Victoria Rail Station and the associated rail and road network
- work with the rail industry to develop an investment plan proposal for 2019 and beyond, that will mitigate key constraints, including Victoria and East Croydon and provide capacity for future growth.





CONNECTED

BUS AND COACH SERVICES

Importance of bus and coach

Modern-day coach travel offers a high quality, affordable alternative to private car. Services can be relatively quickly grown through realistic funding and strong marketing. They provide an effective and efficient means of travelling to and from the Airport. The services operated to and from Gatwick provide access to the Airport not only to London and the South East of England, but beyond to destinations such as Cambridge, Bristol and Nottingham.

London is a key destination for air passengers and high quality coach services to London complement the rail services (via Victoria and London Bridge). However, bus and coach services have a much wider geographic reach, with particular emphasis on journeys within the South East, including local trips to East Sussex, West Sussex, Surrey, Kent, the towns and cities throughout England and Wales. In addition to the needs of air passengers, local bus networks are crucial for ensuring sustainable access choices for the 21,000 employees that work at the airport.

Alongside the aspiration to be competitive and grow market share, Gatwick is aiming to embrace innovation and improve the quality of the passenger experience at the airport. This also sees Gatwick working in partnership with the local and regional communities and business to deliver sustainable growth and a significant contribution to the South East economy.

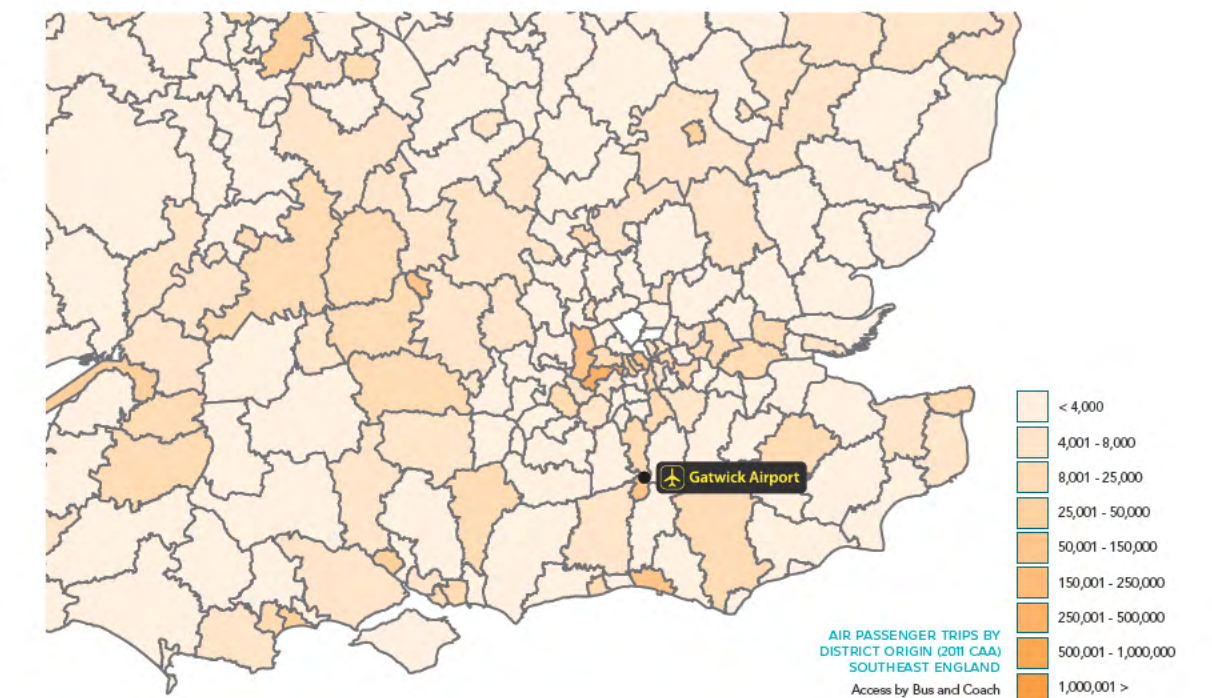
Gatwick is focused upon securing and promoting the highest quality public transport networks and delivering the benefits of investing in the airport terminals and surface access directly to the passengers, staff and the surrounding communities. The aspirations of GAL for bus and coach surface access and facilities at the airport are significantly greater than the current provision. Addressing the issues that this shortfall raises is crucial for sustaining growth over the next decade and beyond. The service providers, of which there are several, have consistent aims to grow patronage and provide services and facilities more efficiently.

The DfT is seeking to support best practice and help deliver best value in local transport infrastructure and service provision. The process of delivery with local authority procurement of

local bus services, in partnership with airports for surface access, is linked to Local Transport Plan commitments and the Passenger Transport Levy used by the airport to support local services that make a positive contribution to sustainable access.

The DfT has recently announced a change to the way in which scheme funding for major investments will be handled in future years (from 2015) with greater involvement in decision making by local authorities and the Local Enterprise Partnerships (LEP's). This will allow LEP's and businesses, such as Gatwick, to work closely with district and county authorities in the delivery of schemes and influence the allocation of funding with less centralised Government control. This emphasises the need for stakeholder engagement and partnership in the delivery of Gatwick's surface access priorities.

FIGURE 24 BUS AND COACH AIR PASSENGER ORIGINS BY DISTRICT





Passenger trends

In 2011, 7% of air passengers and 11% of employees used bus and coach for their travel to and from the airport. Just over a third of passengers travel to and from London, and there are strong corridors of travel from the East and North West. Whilst the wider southeast UK is the broader catchment area, this is patchy (Figure 24).

Through the use of CAA data for air passengers arriving by bus and coach we are able to show:

- 88% of people are travelling for holidays, visiting friends/families
- 62% are UK residents, 38% are non UK.

Express coach and bus mode share is lower at Gatwick (7%) than many other airports (Heathrow 14%, Stansted 21% and Luton 31%), which may largely be due to the high level of rail connectivity.

Passenger feedback has been gained via the Quality of Service Monitor (QSM) survey; this is undertaken by a monthly sample of arriving and departing passengers' feedback. The main reasons for choosing bus or coach for access mode are in order of importance:

- cheapest/best value for money
- fastest/most direct
- closest to home/work
- reliable/on time
- used before
- only mode available
- comfortable
- recommended.

The QSM score for all bus and coach services in August 2012 was 4.28 (1 lowest score, 5 the highest score). At the regular business meetings with operators we review these and agree any actions.

A number of these reasons are key differentiators for bus and coach, namely value for money, direct and convenient for their destination. However, competition from other modes, and a high reliance on car travel to airports has a significant impact on translating these scores into mode share.

These surveys also allow the quality of service to be measured overall, to a maximum score of five, and bus/coach achieves a good score of 4.28. Whilst this is high, there is still room for improvement.

Coach services in 2012

Gatwick Airport is served by a range of coach services, which both complement and compete with the rail network. There are three main operators on-airport which are easyBus, National Express and Oxford Airline. On average there are between 450 and 500 daily arrivals and departures, offering services to destinations throughout the UK, either directly or via Heathrow, Victoria or Birmingham (Appendix 1, Table 5). Many operators have invested in high-quality vehicles, customer service improvements and effective marketing which have contributed to more attractive coach services.

There are a number of key features for an ideal air passenger coach service:

- regular frequency
- operating hours (24 hours a day, 7 days a week, 365 days a year)
- variety of information available via different media
- fares (simple and clear, with the opportunity for advance purchase discounts)
- ticketing (integrated, ability to buy with airline ticket and ability to use smart technology)
- quality of vehicles.

National Express Coaches provides a wide range of direct services to and from Gatwick, including 10 destinations in south and central London, with London Victoria as the main terminus, South Wales

and East Anglia. In total over 30 other towns and cities are served throughout England and Wales. In May 2011, National Express launched new route 206: Poole - Bournemouth - Gatwick South Terminal - Gatwick North Terminal and patronage on the route has been growing steadily.

Despite strong competition from rail, National Express operates high frequencies on its 025 Route (London Victoria - Gatwick South Terminal - Brighton). In December 2011, National Express complemented this with a separate new route A3: London Victoria - Gatwick South Terminal - Gatwick North Terminal. London Victoria is the National Express hub for their UK coach network and passengers find it an effective interchange point between coach services.

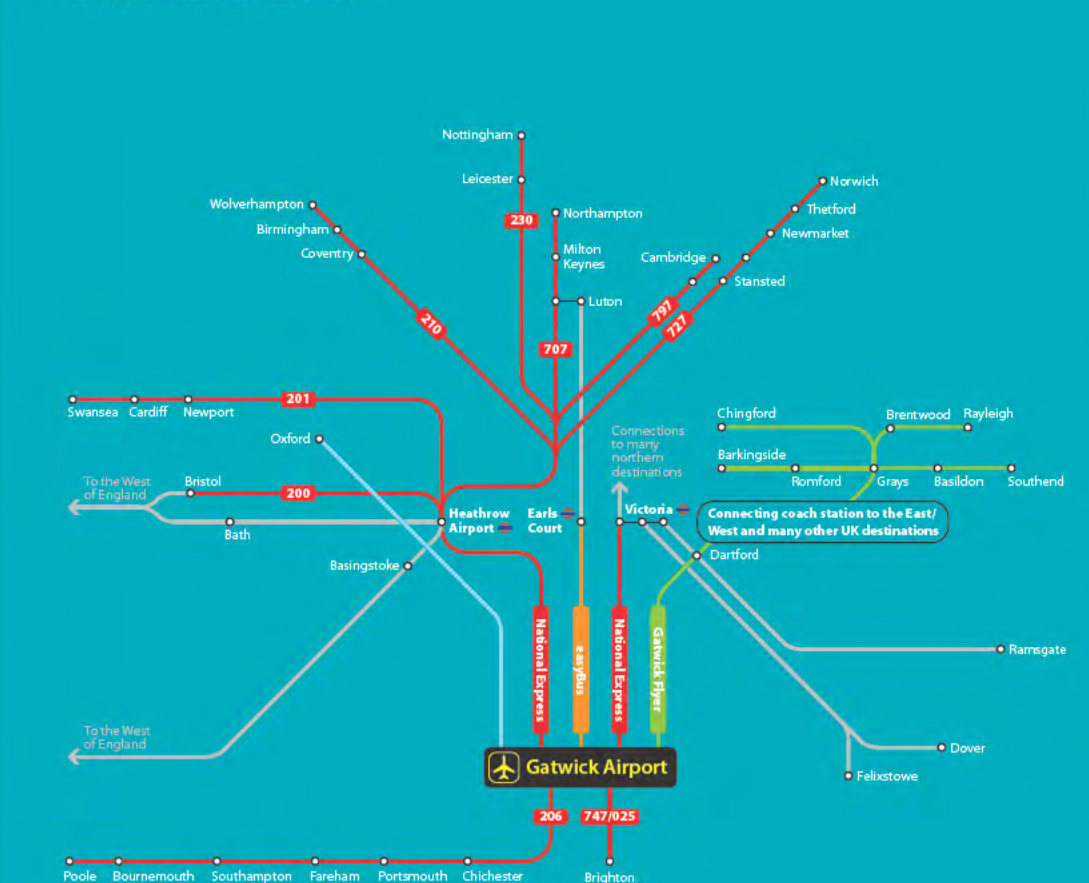
easyBus provides a non-stop shuttle service between Gatwick and London (Earls Court/West Brompton) aimed at providing a low-cost alternative to the Gatwick Express.

Oxford Bus Company provides the Airline service to Heathrow Airport and Oxford. Gatwick Flyer provides a midi coach service to Dartford, Thurrock and Stansted Airport.

In addition to this there are two other shuttle type services which are the Witney Shuttle route 1 (Stow-on-the-Wold - Witney - Gatwick North Terminal - Gatwick South Terminal) and the Gatwick Flyer (Barkingside/Chingford/Southend/South Woodham Ferrers - Gatwick South Terminal).



COACH SERVICES FROM GATWICK





Charter and group travel services

Currently there are over 17,000 charter coach movements a year and peaking at almost 200 a day at the Airport, which are operated by a large number of companies from across the UK. Gatwick Airport will work with the Confederation of Passenger Transport (CPT) to ensure the development of facilities and the effective communication with non-scheduled operators.

Other bus and coach services

In common with other large airports, Gatwick also has a wide range of staff buses/coaches, licensed car parking, car hire shuttle buses, hotel and guest house shuttle buses provided by operators including National Express, Southdown PSV and TGM.

There are ten hotel bus routes which operate on circular routes calling at both terminals in one direction. All routes operate seven days per week and include journeys in the early morning and late evening, in order to match demand from departing and arriving passengers.

There are nearly 30 guest houses or hotels that operate services on request. The vehicles used are often cars or van-based buses, and may have more similarity to a taxi service than a bus service.

In addition to this local companies whose staff use Gatwick as a transport interchange also run bus services to and from the airport.



Coach services in the future

The Bus and Coach Strategy for Gatwick is comprised of four key themes:

- supporting and promoting new services, where they increase the market for coach mode share and provide mode choice for those without access to a car
- enhancing existing services, to strengthen the sustainability of routes and supporting off peak travel
- improving the passenger experience and facilities, to optimise the ease and attractiveness for the customer and provide seamless integration at both ends of the journey
- enhancing and expanding infrastructure provision, to cater for growth and to improve the efficiency of operation or the passenger journey.

In order to deliver these themes, Gatwick will work in close co-operation with the bus and coach operators and Local Authorities to develop an extensive network that is attractive to both air passengers and employees. We recognise that bus and coach services will play an important role in Gatwick's future growth, providing a flexible, sustainable and cost-effective way of connecting the Airport to key destinations. We will actively encourage operators to invest in new services where there is a good business case.

To cater effectively for the proposed growth in passengers it is envisaged that a balanced, integrated approach is taken across these four themes. This should give the best solution for increasing mode share and sustaining passenger numbers.

The following areas are where possible new services could be introduced; these have been identified through market analysis and stakeholder consultation:

- Kent
- East London and Stratford
- Surrey - Guildford
- Hampshire - Andover, Basingstoke and Aldershot
- East Sussex - Uckfield, Hailsham and Crowborough.

The Kent and East London/Stratford services currently look like the strongest options due to the populations that could be served along the route. Through the new Surface Access Action Plan we will identify how we will develop proposals for these areas.

The potential for enhancement to existing services has been identified for the following:

- South London stops on Central London express coach services
- Sussex coastal towns express coach services.

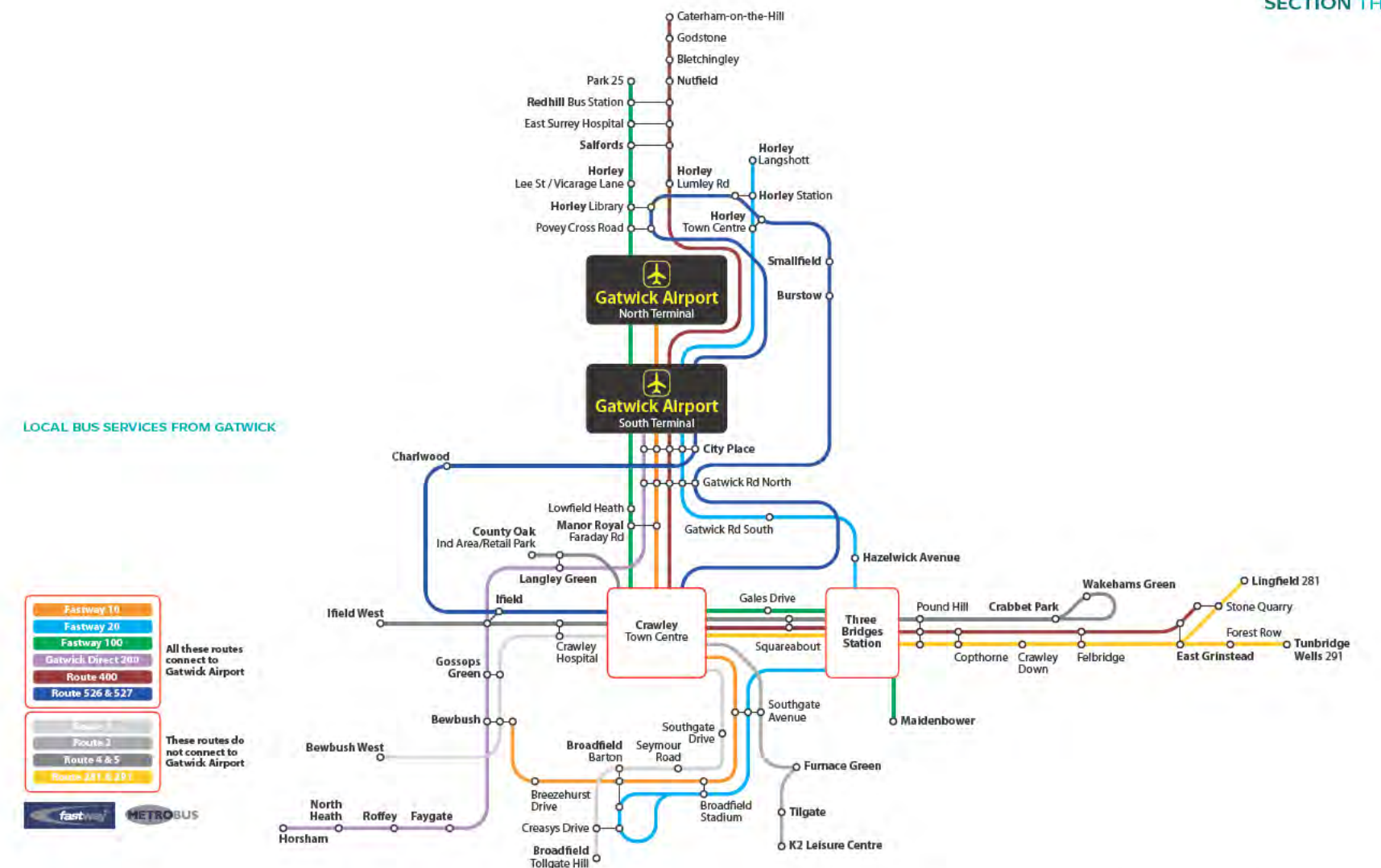
All coach services should have a clear business case and where regional services may need some 'pump priming' to initially set the service up, Gatwick will consider entering into partnerships with operators.

We would expect any new service that is 'pump primed' to be commercially viable within 2-3 years. This recognises that new services will take some time to establish and develop patronage.

In addition we believe there is significant potential to increase the patronage on existing coach services, which we will target with operators on joint marketing campaigns. In particular we will target locations where there are a significant number of air passengers who get dropped off and picked up at the Airport by private car ('kiss and fly' journeys).



LOCAL BUS SERVICES FROM GATWICK



Local buses in 2012

The majority of local bus services are provided by Metrobus and are used by airport staff and air passengers. All buses are low floor, wheelchair accessible vehicles. The main towns served are Crawley, Horley, East Grinstead, Redhill, Caterham and Horsham.

Metrobus provides three 'Fastway' bus routes accessing the airport, using new, wheelchair accessible buses, calling at stops with improved shelters and real-time information displays, and using a combination of bus lanes and guided busways to achieve bus priority over general traffic:

- 10: Bewbush - Broadfield - Crawley - Gatwick Airport
- 20: Broadfield - Three Bridges - Gatwick Airport - Crawley
- 100: Maidenbower - Three Bridges - Crawley - Gatwick Airport - Horley - Redhill.

Since 2000, Gatwick has invested over £6 million in local bus services and infrastructure via the Public Transport Levy. This includes revenue support for the route 200 to Horsham and early morning services on the 400 service from East Grinstead. Fastway is the local areas flagship bus service, running along 24km of route network with extensive bus priority, including stretches of innovative guideways that allow the buses to by-pass congestion hotspots.

Fastway has proved immensely successful since its introduction in 2003 and now carries over 16,000 passengers a day, many of these are airport employees. Fastway 10 also operates 24 hours a day, 365 days a year.

Metrobus also provides four conventional routes serving the airport, which are operated by wheelchair accessible buses:

- 200: Horsham - Gatwick South Terminal - (Gatwick North Terminal for selected journeys only)
- 300: Ifield West - Gatwick South Terminal - Gatwick North Terminal (peak hours only)
- 400: East Grinstead - Gatwick South Terminal - Redhill - Caterham
- 526/527: Crawley - Charlwood - Gatwick South Terminal - Horley - Smallfield.

London General operates two local bus services, which are very infrequent:

- 727: Banstead - Gatwick South Terminal - Crawley provides one departure on Tuesdays and Fridays
- 772: Redhill - Gatwick South Terminal - Brighton.

Particular emphasis has been placed on improving early morning services to the airport every day of the week, in order to enable shift workers, to be able to use the bus to get to work. In 1998, there were just four buses that arrived at Gatwick for staff that were on the early shifts, starting work between 04:00 and 06:00 each morning. Now there are 23 each day.





Metrobus have introduced a range of ticketing options through the use of smart ticketing in the form of a smart Key Card. For example for occasional bus travellers, part time worker or shift worker passengers can buy multi trip tickets for the Crawley, Horsham and Redhill and Reigate areas. These tickets allow passengers to purchase single journey tickets in bulk and the more a person purchases the bigger the discount. 5, 10 or 25 single journeys can be bought in one ticket and a maximum of 50 tickets can be held on the card. The key also allows for monthly and weekly tickets to be bought. Each time a passenger touches their key card on the ticket machine reader, one journey will be deducted.

Airport staff are entitled to the Gatwick Travelcard key card which enables them to buy discounted bus travel, that is not available to members of the public. Staff can top up their smartcard online or at local travel shops.

Metrobus have introduced the PLUSBUS scheme which allows passengers to add bus travel to a train ticket, saving money and being more convenient than buying a separate ticket on the bus.

All local buses are fitted with GPS technology so users can find out how far away their bus is in real time, from any bus stop on the network using the internet or their smart phone. Many bus stops are also fitted with screens providing this information, as well as the exit from Gatwick Rail Station. QR codes and NFC tags at bus stops, compatible with smart phone readers, make it even easier for users to get this information. Buses are also fitted with the 'Next Stop' screens which are very useful for first time travellers.



Local buses in the future

It is important that consideration is given to local bus services separately and although the air passenger mode share is low, the proportion of airport employees carried by local bus services is high. The network of local services integrates Gatwick as an airport and a major employer with the local community.

In order to make local services more sustainable, it is important to have a combination of access to Crawley town centre as well as Gatwick, as this helps to sustain demand at different times of the day. This creates shared benefits with the airport and the local community.

However, it is noted that a number of County Councils are facing increasing financial pressure in helping to fund bus services which they support to provide community benefits (in the context of the overall bus subsidy). This presents a potential threat to the future sustainability of some bus routes at the current level of service. In the immediate future Gatwick will continue to support the 200 and the 400 Service through the Passenger Transport Levy. Once these services are financially viable funding will be moved to enhance other services.

Due to the successful implementation and proactive approach by Metrobus in implementing new and trialling a number of new services, the opportunities for wholly new services are limited. However, one specific service enhancement identified through our bus and coach study is a potential service to Reigate, Dorking and/or Leatherhead.

In developing existing services for the airport market, it is important that the timings of the shift patterns for staff including early starts and weekend working are adequately catered for. Gatwick will continue to consider appropriate support for services at less popular times of the day to stimulate take up of a service. The following options will be key areas of development in terms of on-going investment in local bus services:

- ensure sustainability of existing services
- providing early morning journeys on Metrobus 200
- early morning, late evening and Sunday journeys on Metrobus 400.



BUS AND COACH SERVICES

STRATEGIC PRIORITIES

Deliver the best passenger experience by working with operators to:

- develop new and existing bus and coach services to local and regional destinations
- develop innovative marketing campaigns to increase patronage by air passengers and staff
- improving the passenger experience by achieving a quality score of 4.5 for all services (1 lowest - 5 highest).

Providing bus and coach interchange facilities has been the focus of some of the major projects that Gatwick has undertaken in 2011 and 2012. Our aim is to provide appropriate facilities to encourage people to choose public transport modes.

From 2009 to 2012 we invested £7 million on new bus and coach interchange facilities along with significant changes to forecourt management to place bus and coach passengers in a position where they have higher priority. Over 2 million passengers per annum use our facilities and had an average dwell time of 15-30 minutes.

Facilities in 2012

In the South Terminal, licensed buses, coaches and courtesy vehicles now use a specially designed area in the lower forecourt (inner lane) for dropping off and picking up passengers. In addition a new ticket office has been provided, which is manned by National Express, new timetable holders installed, smoking areas and way finding have been improved.

Changes have also been made to the vehicle operating area that has 10 bays for scheduled coach services, licensed hotel and guest house shuttle buses/vehicles and off-airport car park buses. Charter coaches operate from the outer lane of the forecourt.

Whilst dwell time is low, we will be reviewing the facilities provided for passengers who do have to wait for longer periods of time.

The North Terminal forecourt and bus and coach waiting facilities have been redeveloped during 2012 and 14 bus stops are available for all types of services including Charter Coach. This has created a dispersed operation with on-airport car park buses and scheduled coach operators (National Express and Oxford Arline) operating from the lower Terminal Forecourt. On Furlong Way easyBus, licensed off-airport car park buses, local buses and guest houses buses drop off and pick up and on Northways Charter Coaches drop off and pick up.

Customer feedback is important to us and in 2012 we introduced passenger surveys in the bus and coach area. We have set a target for the quality of the area as 4.5 (scale 1-5, where 1 is lowest).

CONNECTED

BUS AND COACH INFRASTRUCTURE

Key issues cited by passengers in the bus and coach interchange areas were:

- wayfinding
- provision and understanding of bus stop information
- provision of facilities in bus and coach waiting areas.

The QSM score for the North Terminal and South Terminal bus and coach facilities are both 3.91 (where 1 is the lowest score and 5 the highest)

Local bus facilities

Local buses drop off and pick up passengers on the A23 located beneath the South Terminal. These can be accessed by lifts from the International Arrivals area or via stairs near the railway station via the Shuttle station concourse. Real time information screens are located at the exit to the railway station and in the bus stops. Passengers can also use Metrobus's mobile phone app to obtain real time information. In the North Terminal local buses use the facilities on Furlong Way.

Support facilities

Also located in the South Terminal area is the Coach Park which acts as a layover area, a call forward and driver facility. In the future we will work with bus and coach operators to maximise the use of the available capacity in all areas.

Bus and coach licensing

Gatwick is a bus and coach licensing authority and all services that operate to and from the Airport must have a bus and coach licence. The licence sets out the regulations and the airport bylaws with which an operator must comply in order to operate a bus or coach service at the Airport. The licence also sets out that charges are applicable for using the Airport infrastructure.

Bus and coach charging

The majority of major bus and coach stations in the UK levy a charge for the use of their facilities - departure charges also apply at Gatwick Airport and these are part of our specified activities. In discussion with operators we will undertake a consultation for the period 2014 and beyond.

Facilities in the future

The investment in passenger facilities and infrastructure is considered together as this can deliver improvements to passenger experience and potentially increase demand. In 2012, we initiated a bus and coach study and without exception consultation with service providers was positive and enthusiastic about the direction that Gatwick is moving in respect of catering for growth and supporting sustainable modes. Existing bus and coach operators have indicated that they are keen to be active partners in delivering best practice at Gatwick and supporting targets for growth.

In the short term, we will focus on providing enhanced information, way finding for passengers and enhancements to passenger comfort based on passenger feedback. We will ensure that this allows for those who want to use technology and those who do not.

In the mid - long term, Gatwick has proposed as part of its Business Plan to improve bus and coach facilities. This includes lift access and a covered walkway to the South Terminal for local buses, improved and additional capacity for bus and coaches in the North Terminal area.

BUS AND COACH INFRASTRUCTURE

STRATEGIC PRIORITIES

Help our airlines to grow and deliver the best passenger experience by:

- monitor existing and future bus and coach interchange capacity and explore opportunities to provide a step change in provision
- embracing the benefits of new and existing technology to provide information to passengers which they require
- delivering a seamless passenger experience which is fully accessible
- achieving a quality score of 4.5 for all surface transport facilities on-airport (1 lowest - 5 highest).

CONNECTED ROADS



The importance of the road network

As the UK's second busiest airport, Gatwick is well placed in relation to the UK road network directly connected to the M23 at Junction 9, which directly connects to the M25. Most of the traffic accessing the airport uses these connections.

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

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

For passengers using the road access to Gatwick Airport, reliability and predictability of journey times are key issues. Congestion on the M25 constrains highway accessibility in the commuter peak, but the motorway ensures a wide catchment by road at other times of the day.

The road network in 2012

There are many people who access the Airport by car for whom there is no practical alternative. The road network is crucial not only for these passengers but also the bus and coach operation as well as logistics traffic which relies on an efficient road network. Therefore, we must retain a good quality road network that is both efficient and safe.

Gatwick Airport manages the 23 miles of road in the airport network over which it has Traffic Authority responsibility, as required by the 1976 Gatwick Traffic Act. The Airport has developed a Landside Roads Network Plan to strategically manage our roads; this recognises best practice and the requirements of national guidance. The Plan sets out how we manage our roads from capacity modelling to planned maintenance. Gatwick has developed a traffic model which is being updated in 2012/13. This is used to identify solutions to current and future traffic scenarios, including the impact of new developments and traffic management schemes.

The integration of the environmental management of our road network has been put in place with the initial trial and now general use of solar-powered signs. Our aim will be to extend this approach across the Airport. During the construction of any project we use recycling technology to ensure that at least 85% of construction waste is recycled.

In recognising its role as a Traffic Authority, Gatwick has followed the Highway Agency best practice established in response to the Traffic Management Act, and has a long established 24-hour operational team for the landside areas of the Airport. Part of their responsibility is to look after the day-to-day running of the surface transport infrastructure at Gatwick. They can often be seen out and about on the Airport's road network and the passenger transport interchanges on a daily basis, trouble shooting and ensuring that the network functions efficiently and reliably.

The roads outside the immediate airport environment are managed by the Highways Agency (M23) and West Sussex County Council (A23 roundabout). The A23 Longbridge Roundabout to the north of the airport, managed by Surrey County Council, is also a critical junction for local traffic to and from Redhill, Reigate and Horley.

For passengers there are already a number of systems technology based tools, which can help drivers plan their journeys, and provide information in real time. The Highways Agency has put significant effort into developing communications systems for drivers to enable them to predict and know what their expected journey times will be.

Equally, Gatwick, the local authorities and the Highways Agency are continually developing the ways in which they work together to make sure impacts on journeys are minimised during periods of disruption. A number of local authorities have raised the issue of parking by air passengers on local roads. It is known that this has occurred in the past with a small number of off airport 'meet and greet' operators. We are committed to working with the local authorities to understand the scale of this activity and to support them in resolving this issue as far as reasonably practical.

Incidents on the strategic and local road network can have a disproportionate impact on passengers travelling to the airport. With the Highways Agency, Sussex Police and the Local Highway Authorities an incident management plan has been developed. This will be under continual review and all parties are committed to working together to minimise the disruption to passengers and commuters alike and restoring traffic flow as quickly as possible.





The road network in the future

Our focus will be to manage the demand for road traffic, taking into account any planned improvements. In the first instance we will make best use of existing infrastructure through improved information to travellers, both before and during their journey through a variety of media and the use of new technology.

Equally we recognise that a reliable and efficient network requires an element of control. Following the report by the South East Airport Task Force (SEAT), in the short term Gatwick will investigate and consider the introduction of civil parking enforcement; if it can be shown to have benefits to improve the flow and safety of the airport road network and in particular the drop off forecourt areas, it will be introduced.

In addition to this a number of improvements were agreed with the Highways Agency, West Sussex and Surrey County Councils in relation to the 2009 North Terminal Planning Application. An assessment of the airport road system capacity was carried out to understand the capability of the road network to support the operation of the airport at 40mppa. At the time this transport assessment was undertaken we expected to reach a throughput of 40mppa in 2019. Although our base case forecasts now indicate this throughput will be reached in around 2021, we believe that this assessment still provides a reliable indication of the capability of the airport road system to support 40mppa (Table 6).

As a result of airport growth, there is expected to be an increased demand for all forms of transport to, and from, the airport. However, the airport is already achieving a higher than expected public transport mode share (42% at 33mppa) and this reduces the relative impact of growth in airport related vehicular trips. In the future it is expected that as daily air passenger volumes rise, staff journeys will decrease by car and that the largest increase will be attributable to non-airport traffic. The actual daily traffic flows will be re-measured in 2012/13.

The conclusion reached from this analysis was that the existing road link capacities would be adequate to serve the airport at 40mppa, but that there would be a requirement to enhance some of the key road junctions before 2020. These are:

M23 Junction 9A

There is a proposed Highways Agency (HA) improvement scheme which includes full signalisation. A further scheme proposed by the HA would provide a dedicated left turn for eastbound traffic from Airport Way to Junction 9 of the M23, which would further increase the capacity of this roundabout.

North Terminal roundabout

The agreed improvement consists of permanently closing the Gatwick Way entry, in order to provide a free running slip lane from Airport Way into the North Terminal. This has initially been implemented as a temporary scheme and, because the new layout is a success, a permanent arrangement has been designed.



Subsequently, dependent on traffic growth, it may be necessary to implement an additional scheme for the partial signalisation of the roundabout at the Airport Way and North Terminal approaches to the circulating carriageway. This will be reviewed following the new traffic counts in 2012/13.

Beehive roundabout

Modelling of the Beehive roundabout indicates that non-airport traffic growth causes the roundabout approaches to suffer from significant queuing and delays. Full signalisation of the roundabout is the recommended solution to this. It is estimated that over 60% of the traffic using this roundabout at present is non-airport related, however the majority of the growth in the decade to 2008 can be attributed to airport growth.

Strategic road network

The Government and the Highways Agency have outlined a number of improvements for strategic road management in the National Infrastructure Plan and in other announcements which will ensure strategic road access to Gatwick. These include:

- Route Management Strategies for Strategic Routes
- M25 Managed Motorway (hard shoulder running) Junctions 5-7
- M25 Controlled Motorway Junctions 7-10
- free flow running for the Dartford Bridge/Tunnel.

TABLE 6 DAILY TRAFFIC FLOWS COMPARING 2008 WITH GATWICK AT 40MPPA

	2008 DAILY TRAFFIC	2008 DAILY TRAFFIC %	40MPPA DAILY TRAFFIC DEMAND	40MPPA DAILY TRAFFIC DEMAND %	2008 - 40MPPA CHANGE %
Air Passenger	76,300	49	85,200	50	+12
Staff	19,400	12	16,900	10	-13
Cargo/Control Post	8,100	5	8,200	5	+2
Non- Airport traffic (i.e. through traffic)	52,000	33	61,000	36	+17
Total	155,700	100	171,300	100	+10

ROADS

STRATEGIC PRIORITIES

Increase the value and efficiency of the road network by working with adjoining Highway Authorities and the Highways Agency to monitor and manage existing capacity and deliver new road capacity as required.

CONNECTED

TRAVELLING BY CAR AND PARKING

Importance of car parking

Car parking is an essential function of the airport operation with around 21% of passengers deciding to park their car at the airport. However, while the forecast growth in passengers will increase, the demand for parking spaces and a greater use of public transport should result in a gradual decrease in the passenger/parking space ratio.

Whilst the core of our ASAS is to support the increase in public transport mode share, an attractive parking offer has been shown to be successful in reducing the proportion of passengers being dropped off, thereby reducing the volume of road trips to, and from, Gatwick.

A range of car parking products is provided on-airport to meet the needs of our travellers across the spectrum of passenger groups - core, premium, business, family, PRM. Car parking generates half the 'kiss and fly' road trips and it has a role in reducing congestion, carbon emissions and managing road traffic. Gatwick has current planning permission for further car parking which will be constructed as and when demand requires it. Providing adequate car parking at an appropriate level on-site is therefore essential to our success in managing road traffic demand.

Our key objectives for car parking are to:

- accommodate all additional airport-related car parking on-airport
- make the most efficient use of the combined on-airport supply - public and staff
- optimise car parking locations in relation to South and North Terminal demand
- continue 'yield management' measures to maximise use of the long stay car parking assets and reduce need for 'kiss and fly'.

Car parking passenger trends

In 2011, around 21% (CAA 2011) of air passengers used cars as their choice of travel mode and then parked their cars either on or off airport. The majority of these journeys are from the South-East and from East Anglia (Figure 25). 99% of passengers who choose this mode are UK based and 91% were travelling on holiday.

Car parking in 2012

Gatwick Airport provides a range of car parking for passengers and visitors which comprise long stay surface car parks (27,410 spaces), short stay car parks (5,060 spaces) and valet spaces (1,345). Short stay parking is typically used by 'meeters and greeters', people travelling on high value trips such as business and to a smaller extent by leisure passengers accessing London by train. As such, short stay parking is located within close walking distance to the terminal building. Long stay parking is for a day or more, and the demand may be met by a variety of parking products, such as valet parking, or remote parking requiring a shuttle-bus connection to the terminal.

Passengers cite ease of use, closeness to terminal and frequency of shuttle buses as their reasons for choosing on-airport car parks.

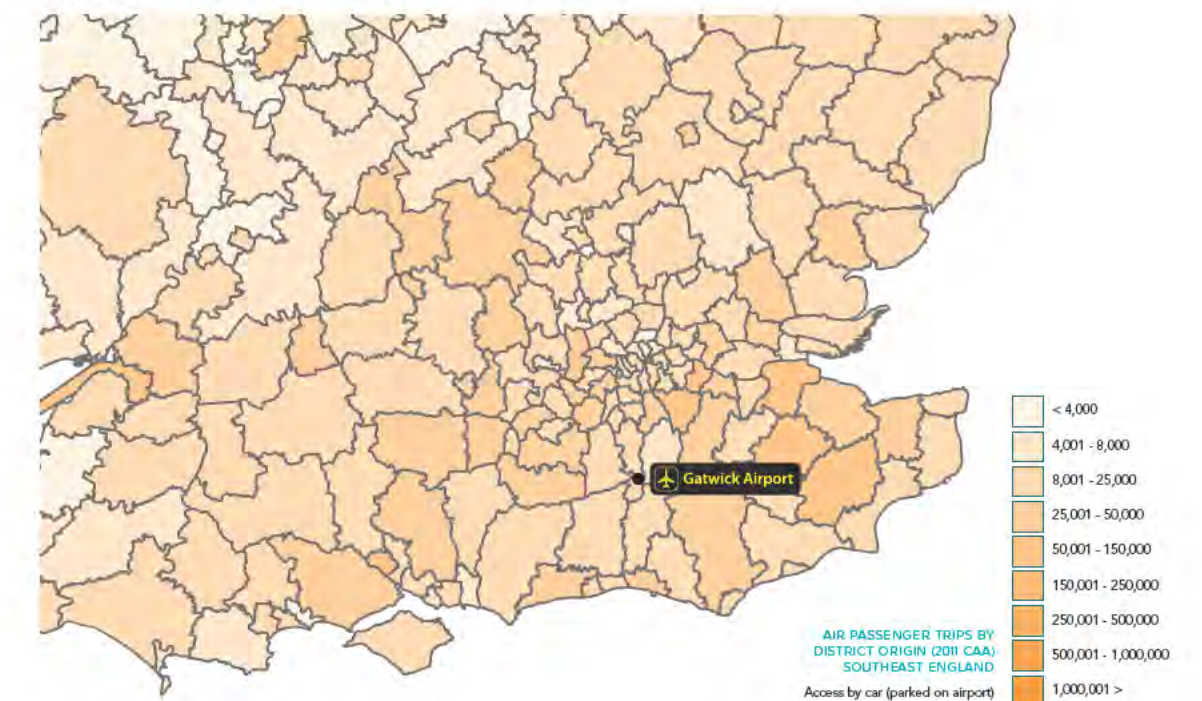
All on-airport car parks also contribute to the PassengerTransport Levy which provides a fund to promote public transport and sustainable transport modes.

Whilst some commuters are dropped off/picked up for travel from Gatwick Airport railway station, there are others that choose to park at the airport. In order to ensure that these commuters do not interfere with air-related travel, some 200 dedicated spaces have been created for rail commuters near the South Terminal through the removal and reallocation of some staff spaces to more remote locations.

Like other UK airports, there are a number of off-airport car parks that are operated by third parties including parking at a number of hotels. In addition, there are a number of facilities without the necessary planning consents provided by third parties, which include both parking facilities and 'meet and greet' services.

In order to curtail such unauthorised operations, the surrounding local authorities take enforcement action where appropriate either through planning or trading standards legislation. This has resulted in the closure of a number of these sites.

FIGURE 25 ORIGIN OF CAR PARK PASSENGERS BY DISTRICT





In recent years, there has been a proliferation of unauthorised car parks around the airport which have been set up on fields and brownfield sites without formal planning consent. Of particular concern is the significant rise in 'meet and greet' services that operate from some of the unauthorised sites. Apart from contributing to congestion and emissions on the local road network, some unlicensed 'meet and greet' services often fail to provide basic customer service which can damage the reputation of Gatwick Airport as a whole.

Equally there are a number of off airport operators who pride themselves on good customer service standards. Therefore, the Airport is working with West Sussex and Surrey Trading Standards, The Gatwick Parking Association and the AVPCA to introduce a preferred trader's scheme 'Buy with Confidence' to address this issue.

In September 2011 Crawley Borough Council carried out its annual car park survey and found that there were a total 45,803 cars parked at on and off-airport sites on the day of the survey. Of this total, some 5,800 vehicles were parked in facilities without the necessary planning consents.

Car parking in the future

The Master Plan for Gatwick Airport identifies the car parking demand when the airport reaches 40mppa will be:

- approximately 2,649 short stay spaces, 947 valet in South Terminal;
- approximately 2,021 short stay spaces, 1,188 valet in North Terminal; and
- approximately 27,865 long stay spaces on-airport.

This gives a total capacity for approximately 34,700 parking spaces. However, these figures do not take into account the spaces allocated for picking up passengers (1,900 spaces).

We have reviewed the car parking forecast as part of the review of our Car Parking Strategy and this concurs with the Master Plan in terms of space requirements. These additional spaces are expected to be provided on-airport by a mixture of decking and multi-storey car park construction on the site of existing surface car parks. More detailed planning work will need to be undertaken to establish the optimal location for these new car parks.

As part of our review we also considered the case for a park and ride facility operated by GAL. Following a thorough examination we do not believe that this is appropriate or necessary given our plans set out in the Airport Master Plan.

We also carried out a benchmarking exercise with other UK international airports. There appears to be some consistent stand out technologies which ensure the efficient operation of car parking facilities:

- **Smart parking:** Sensors in each car parking space to gauge utilisation. Typically, green arrows are used to direct drivers towards empty spaces to minimise the guesswork/space searching time for passengers.
- **Variable Message Signing (VMS):** The use of dynamic VMS systems in car park facilities help provide passengers with real-time information on how many spaces are available on each floor of a multi-storey car park, to direct drivers to floors where there are a greater number of spaces. This allows drivers to make a faster decision regarding the area they consider most appropriate to search for a space. This is available in the short stay car parks at Gatwick.
- **Loyalty programmes:** A number of airports in the USA have loyalty parking schemes. Each full day parked on site, a number of 'coupons' or 'loyalty points' are gained which can be used for free parking days or gifts from an available gift list.
- **Payment:** The use of credit card in/ credit card out payment systems help speeds up payment procedures and makes the entry and exit of car parking areas more efficient and user friendly for passengers. In the future ticketless payment will likely feature. This is available at Gatwick.
- **Mobile phone:** Mobile phone Apps providing information on nearby road congestion, recording the location of where the passenger's car is parked, ticketless payment etc.
- **Spaces by different users groups:** Spaces provided for the following groups: disabled, premium, economy, family and for people with electric cars.

The development of car technology will also have a strong influence on the passenger experience such as in vehicle information and entertainment. We also know that vehicle fuel technology is also likely to change more significantly in the future with more and more electric vehicles becoming common place, this will give rise to the need for more charging points and space provision in priority locations.



CAR PARKING

STRATEGIC PRIORITIES

To deliver the best passenger experience and increase value and efficiency by:

- accommodating all additional airport-related car parking on-airport
- making the most efficient use of the combined on-airport car park supply
- optimising car parking locations in relation to South and North Terminal demand
- continue 'yield management' measures to maximise use of the long stay car parking and reduce need for 'Kiss and Fly'
- to apply the use of technology to enhance the passenger experience
- to introduce a preferred traders scheme for authorised off airport car parks.

CONNECTED

DROP OFF AND PICK UP BY PRIVATE CAR

Importance of drop off and pick up

A proportion of air passengers are dropped off/picked up by friends or relatives at the Airport by private car. These are called 'drop off' or 'pick up' or 'kiss and fly' trips, they create double the amount of car trips compared with park and fly, causing more congestion and are a significant contributor to CO₂ emissions for surface access.

Drop off and pick up trends

The majority of major UK airports have identified this type of road trip as one which they would like to reduce, as it is the least sustainable of all. For example Manchester Airport has reported that 61% of their air passengers' travelling to the Airport falls into the 'kiss and fly' category. By way of comparison just over 22% of air passenger trips fall into the 'kiss and fly' category at Gatwick.

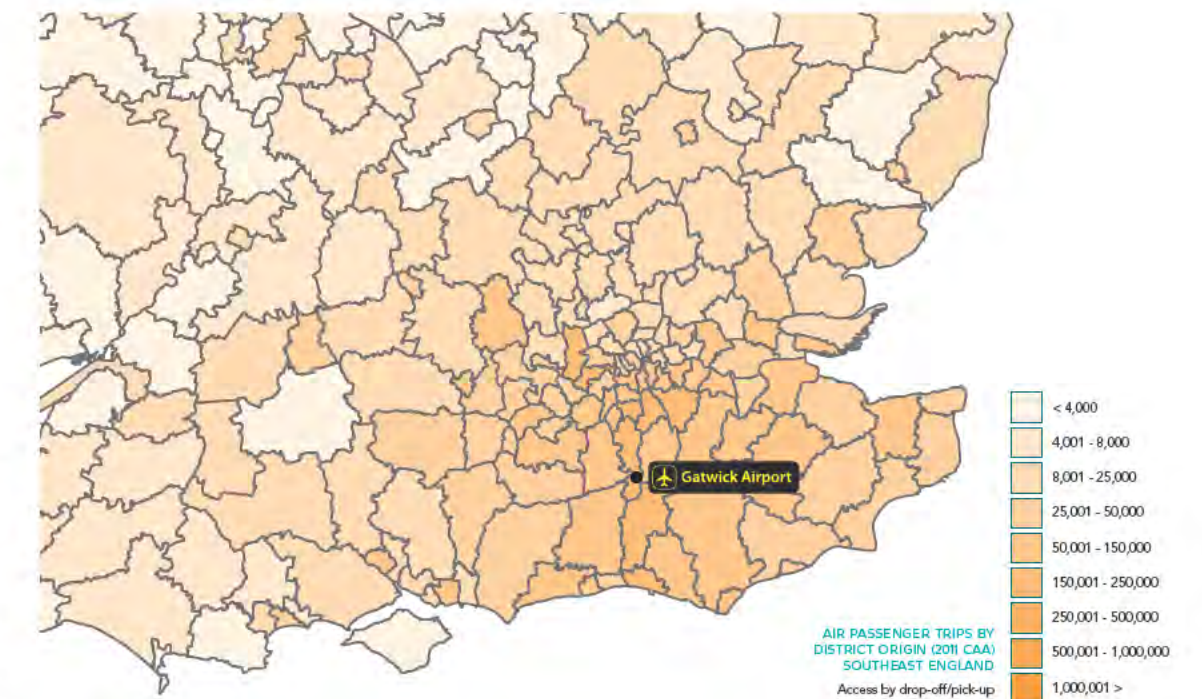
Through the use of CAA data (Figure 26) we are able to show that the majority of trips do come from the districts closest to Gatwick or those with direct road links. The dominant journey purpose is holiday travel and 84% of passengers are UK based.

Drop off and pick up in 2012

In line with other airports Gatwick continues to want to target a reduction in drop off/pick up movements by private car as it is the least sustainable of all modes. The Airport allows the set-down of passengers on its Terminal Forecourts and the pick-up of passengers takes place in the short stay car park where there is a minimum charge.

In 2011 and 2012 both the North and South Terminal Forecourt areas were re-constructed and drop off areas were moved to the outer lanes of the forecourt. Whilst this has improved the overall flow of the Terminal areas, congestion is still experienced during peak times. This is caused by a number of issues such as inefficient use of lane capacity and parking space, off airport meet and greet operators and spaces being used for long periods by people waiting to pick passengers up.

FIGURE 26 DROP OFF AND PICK UP AIR PASSENGER ORIGINS BY DISTRICT



Drop off and pick up in the future

Within this Strategy we have set out how we intend to promote other forms of transport and to target these types of trips and change passengers' choice of travel mode to a more sustainable form. Equally we will look to traffic management measures and parking enforcement activities to manage these spaces effectively. This may include civil parking enforcement as well as the use of technology. From our surface access models we believe that the measures implemented throughout this Strategy will reduce the mode share of this group by around 5%.

We will be looking at each of the groups in our product matrix - premium, business, PRM and family to ensure that we have facilities, which cater for their need.

DROP OFF AND PICK UP

STRATEGIC PRIORITIES

Increase the value and efficiency of our road network by:

- reducing the proportion and number of passengers who are dropped off/picked up by private car
- effectively manage the forecourt drop off areas to ensure efficient use of capacity for drop off of passengers.

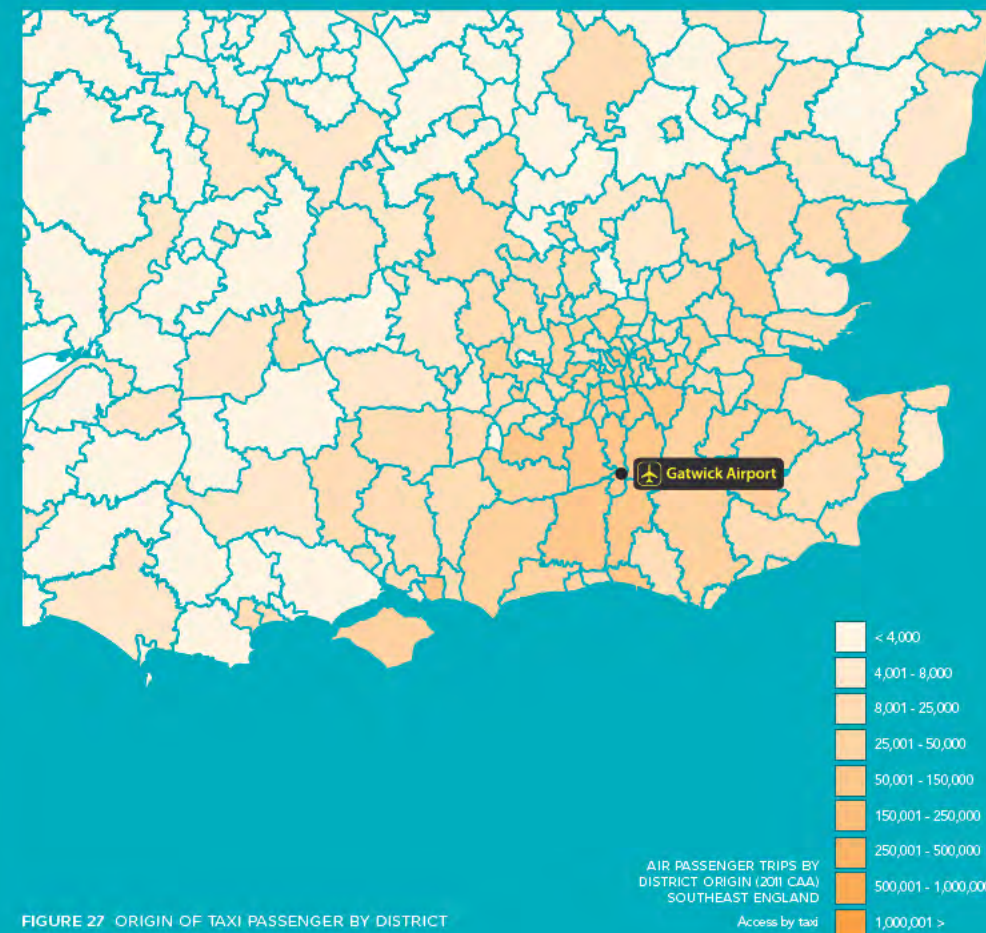


FIGURE 27 ORIGIN OF TAXI PASSENGER BY DISTRICT



CONNECTED TAXI



Importance of taxi

Taxi provides an ideal on demand transport service for air passengers, especially for those who do not have access to a car. Taxis are also able to offer a good service across all types of air passenger groups.

Passenger trends for taxi

In 2011, 11.3% of air passengers used taxis for their travel to and from the airport. A strong corridor of travel for passengers using taxis are the areas immediately around the airport and well as the M23/A23 immediately south and north of the airport (Figure 27).

Through the use of CAA data we are able to show:

- the dominant journey purpose is for holidays, closely followed by business and visiting friends/families
- 83% are UK residents, 17% are non UK.

Taxi services in 2012

Gatwick strongly values the provision of a dedicated on-airport taxi operator and the current provider was awarded the contract through a fair, open and competitive tender process in May 2012. Gatwick selected a local, Horley-based company - Road Runners UK - as its official on-airport taxi service provider.

A key aspect of the contract is to improve customer service and vehicle quality as well as providing good value for money at local, not London rates. The principle of the service is that vehicles are waiting on the taxi rank ready to go and that there should be little or no wait for an airport taxi.

Taxi services in the future

In the future we would expect the principle of a ready to go taxi service continuing to be present on-airport. As vehicle technology and alternatively fuelled vehicles develop we would expect these to be brought into the fleet mix.

It is also likely that all taxi companies will look to maximise the use of taxis and we would expect the use of technology to bring customer service improvements in the future.

TAXI

STRATEGIC PRIORITIES

To deliver the best passenger experience by working with the on-airport taxi operator to deliver continuous improvement in customer experience and consistently achieve 4.5 quality rating (1 lowest - 5 highest).

CONNECTED CAR RENTAL



Importance of car rental

Car rental offers a convenient way for passengers without direct access to a vehicle to travel with comfort and convenience to the door of their destination and flexibility for additional travel needs. This means that nearly all areas of the UK can be accessed which is particularly important for business travellers. Nearly a third of people who are picked up and dropped off are foreign travellers - car rental offers an ideal opportunity to replace this type of trip. This will result in a reduction in car trips to and from the airport.

The companies offer a wide range of products for all types of passenger, offering the most modern fuel efficient vehicles, as well as flexibility on how the car is used such as one way journeys etc. Car rental offers an efficient use of a private car.

At Gatwick we are one of the few airports to provide direct access from the Terminal to car rental pickup points. This is especially important for business passengers who value their time highly and do not want to spend time on a bus from the Terminal to a car rental facility. Equally for families', car rental offers a value for money travel choice and avoids unnecessary handling if they have large amounts of luggage.

Car rental trends

Car rental accounts for 1.8% of all air passengers' mode choice in 2011. The most dominant journey patterns are to the south and south east of the airport; in some cases these are the least accessible areas such as north eastern Kent (Figure 28).

Over 71% of passengers are foreign and the dominant journey purpose is for visiting friends and family, closely following by business and holiday purposes.

Car rental in 2012

On-airport there are 5 car rental operators. Passengers can pick up and return their vehicles close to both the Terminal buildings. All of the back-up facilities for preparing vehicles are located in the South Terminal area close to the passenger facility.

The car rental companies themselves are very often worldwide companies and have strong branding and allegiance by passengers. They offer a product which crosses all of our passenger groups such as business, premium, family and PRM.

In 2012, Gatwick started working with the British Vehicle Rental Leasing Association (BVRLA) to take a forward looking approach to developing car rental at the airport. The overall shared aim is to double the car rental mode share through a series of identified activities.

Car rental in the future

Our aim is to double the car rental mode share for air passengers at Gatwick by working closely with the BVRLA through developing both the on-airport facilities and how we promote car rental to passengers. The operators themselves are continually developing and innovating products to meet passenger needs which include electronic check in, and automating the processes that passengers are required to go through.

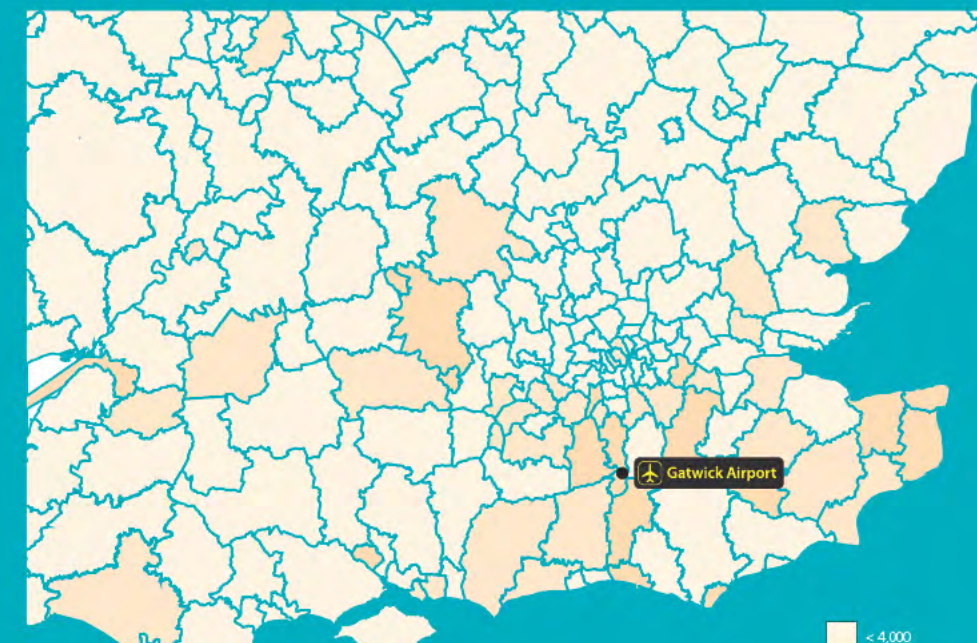
Within Gatwick's Business Plan is a proposal to consolidate the 'back up facilities' for Car Rental to ensure efficiencies are gained.

CAR RENTAL

STRATEGIC PRIORITIES

To deliver the best passenger experience and improve value and efficiency by working with the BVRLA to:

- to deliver continuous improvement in customer experience and consistently achieve 4.5 quality rating (1 lowest - 5 highest)
- to bring forward a scheme to develop efficient back-up facilities.



AIR PASSENGER TRIPS BY DISTRICT ORIGIN (2011 CAA) SOUTHEAST ENGLAND
Access by hire car

< 4,000
4,001 - 8,000
8,001 - 25,000
25,001 - 50,000
50,001 - 150,000
150,001 - 250,000
250,001 - 500,000
500,001 - 1,000,000
1,000,001 >

FIGURE 28 CAR RENTAL AIR PASSENGER ORIGINS BY DISTRICT

A PLACE OF WORK

EMPLOYEE TRAVEL

Being a place of work is another fundamental element of Gatwick as a Transport Hub. Whereas most airport passengers visit the airport once or twice a year, the airport's 21,100 employees work an average of around 200 days a year. The total number of journeys made by staff to and from work - around 10 million over a year - makes reducing their road trips a key part of our future plans.

Importance of employee travel planning

Our strategy for employees focuses on reducing single car occupancy. Through our ongoing surveys we have gained an understanding of the transport needs of airport employees for their travel to the airport. Many other local businesses are facing similar employee transport issues to Gatwick and there is scope for joined-up marketing campaigns to reduce car usage. This has historically been undertaken under the Gatwick Commuter scheme. Following a thorough review of our activities we will be refocusing our efforts on employee travel and producing a separate Airport Travel Plan in 2013. This will support the ASAS and drive performance in this area.

TABLE 7 TOP TEN EMPLOYEE HOME LOCATIONS (STAFF TRAVEL SURVEY 2012)

LOCATION	%
Crawley	35.2%
Horley	7.0%
Brighton	6.0%
Horsham	5.7%
London SW and SE	2.8%
Haywards Heath	2.6%
Redhill	2.5%
Burgess Hill	2.3%
East Grinstead	1.9%
Croydon	1.5%

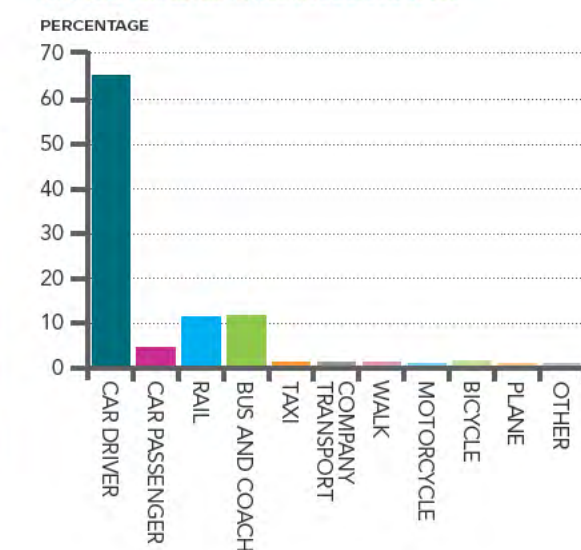
Employee travel trends

In 2012, we undertook the latest airport employee and employee travel survey. Overall this showed that there were estimated to be 21,109 staff employed on-airport in 230 companies in 2012. This represents a 7% decrease from the total employed in 2008 (22,711 in 200 companies); this reduction appears mainly in staff employed by airlines and handling agents.

As would be expected most employees work shifts (84%) and this is now mainly on a 4 day shift pattern. The average wage on-airport is around £23,000 and it is estimated that a quarter of permanent employees earn less than £13,000 a year in 2012. Over a third of employees live in Crawley and the towns nearest to the airport (Table 7).

Given the location where staff live, it is not surprising that 46% staff travel less than 10 miles to work, and the average commute is 25 miles. 38% employees estimate their commute takes 20 minutes or less, and the average journey to work is 38 minutes. Employee travel mode has remained relatively unchanged since 2007, with 32.2% using public transport and 65% driving to work (Table 3 and Figure 29). Whilst this is still a very good performance, when compared to other airports and companies within the South East, we recognise that there is a need to show continuous improvement in order to reach our target of 40% of staff using sustainable transport by the time the airport reaches 40mppa. Public transport, especially local bus travel is an affordable mode choice for staff where services are readily available.

FIGURE 29 EMPLOYEE TRAVEL MODE SHARE IN 2012



Employee travel in 2012

The Gatwick Commuter scheme focuses on working with operators to target key corridors to increase public transport mode share and these are aligned to the targets in Table 8.

Bus and coach

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

Since 2003, we have invested over £6 million in the Fastway 24-hour bus service for employees who live in Crawley-Horley. We've been rewarded with a real turnaround in the number of employees from these towns (who comprise a third of all airport employees) using the service. The 2012 survey showed that 11% now use local bus compared to only 5% ten years ago.

Gatwick staff who use the local bus services including Fastway, which are run by Metrobus, are able to buy the Gatwick Travelcard (a smart key card) which is accepted at all times on all Metrobus routes which serve Crawley or Gatwick. These are available for periods of 1 week, 4 weeks and annually and can be topped up online. It allows for unlimited travel on a large number of routes. We will continue to work with Metrobus to ensure continuity of the scheme and to look at new ways of targeting marketing activities to ensure staff are aware of the benefits on offer.

Through the Passenger Transport Levy, Gatwick Airport supports the Metrobus 200 and 400 bus services to enable enhancements to the operating hours of the service. To facilitate travel around the airport site, Gatwick and tenants of the City Place Business Park co-fund a free zone scheme allowing free bus travel around the airport and to City Place.

The main Coach services used by staff are the National Express services and staff also receive a discount on their journeys.

The availability of early morning and late evening services are critical for employees who choose to travel by this mode.



Rail

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

Airport staff are eligible for a Gatwick Traincard which gives a discount on most train fares across the South East rail network. This is again popular with staff and has shown progressive growth in take up. We will continue to work with the rail operators to promote the scheme to airport employees.

The availability of early morning and late evening services are critical for employees who choose to travel by this mode. Gatwick is promoting this through consultation on upcoming train operating franchises.

Car sharing

One of the main activities of Gatwick Commuter is to promote the Airport's Car Share scheme to reduce the number of single occupancy car trips to and from the airport. Car Sharing is often popular with staff that work shifts, due to their exact start and finish times. This has been steadily growing in popularity with over 500 staff now being registered on the car share data base. A dedicated car share car park is located in staff car park R on-airport.

Cycling and walking

Cycling and walking are a small, but important components of our strategy. They provide staff with the opportunity to make local journeys to destinations in and around the airport. The National Cycle Route 21 passes through the airport on a north-south axis and is the principal pedestrian and cycle access route to the airport. It links into the local networks in Crawley and Horley. There is also access to the airport via Povey Cross Bridge which is convenient for staff living around Charlwood and Hookwood, and from the Balcombe Road for residential areas to the east of the airport.

Gatwick has joined the Government's Ride2Work scheme and a large number of employees have been able to purchase new cycles at a discounted rate.

At various points around the airport new cycle parking has been introduced during 2012. We will continue to introduce cycling and walking facilities to meet and stimulate demand.

Motorcycling

The Government's White Paper, The Future of Transport, recognised that mopeds and motorcycle can provide an alternative means of transport for many trips. Gatwick has numerous motorcycle shelters located in employee and air passenger car parks. In future we will continue to develop facilities for motorcycling to meet and develop demand.

Reducing business travel

At the Airport the majority of jobs are operational and as such require working on-site. However, there are a number of employees who are predominantly office-based and occasional home working is an acceptable option. Those Gatwick employees whose jobs lend themselves to working from home are able to access GAL's computer network remotely via the internet.

In addition Gatwick has video and tele-conferencing facilities readily accessible for use as an alternative to travelling for face to face business meetings.

Recruitment and new employees

Providing travel planning is an integral part of the induction process for new GAL employees who receive information as part of the recruitment process. We will work with other employers on the airport to encourage them to promote sustainable transport choices during their recruitment and induction processes.

Marketing

A key activity of the Gatwick Commuter Scheme is promoting the alternatives to driving to work alone. By the end of 2012 new staff travel information leaflets will be introduced across the airport. However, the very nature of the airport requires a variety of measures to be deployed from large outdoor posters located close to car parks, internal posters on notice boards, employee restaurants and rest areas, advertisements and articles in airport newspapers to leaflets, newsletters, websites and face-to-face visits.

Staff car parking

The airport-managed staff parking currently provides 7,000 spaces. All new employees who request a car parking pass for a Gatwick airport car park space are allocated to the remote Car Park X.

Employee travel in the future

Following a thorough review of our activities we will be refocusing our efforts on employee travel and producing a separate Airport Travel Plan in 2013. This will support the ASAS and drive performance to ensure we reach our 40% public transport mode share target by the time the airport reaches 40mppa.

To help us do this we have reviewed the data from the 2012 Staff Travel Survey which identified that for staff who travelled to work by car 40% said they could potentially travel by rail, 29% by bus and coach and 14% could have car shared. We have also looked at the reasons why people said they chose not to travel by the other form of transport.

Equally over 40 airport companies have indicated that they would like to receive travel information for their staff and it will be important to widen our communication methods to all 230 companies on-airport.

In developing the new Airport Travel Plan we will take this information into account in all of our activities especially marketing initiatives. The Airport Travel Plan will explore in more detail all of the possible initiatives which includes cycling, walking, public transport and other initiatives.

During the life of this ASAS many transport operators are moving towards Smart Card Technology and introducing schemes based on the ITSO card. Our ultimate aim would be to work with Operators to have a unified and consistent staff discount scheme which uses ITSO technology.

EMPLOYEE TRAVEL

STRATEGIC PRIORITIES

Increase value and efficiency by improving the public transport mode share for employees by:

- introducing a new Airport Travel Plan by the end of 2013
- to promote sustainable employee travel measures to all employers on-airport
- improving the attractiveness of public transport to staff by working with operators to achieve consistent smart card technology for all staff discounts.

A PLACE OF WORK

LOGISTICS SUPPORTING THE AIRPORT

In supporting the airport in its daily activities there are a number of logistics activities which occur. These are the air cargo operation, deliveries to the airport, and internal airport road trips.

Importance of logistics

The Future of Transport White Paper identified that: 'Effective freight transport is essential to our economy and prosperity. In turn, economic growth increases demand for goods and therefore their transportation locally, nationally and internationally.'

Logistics activity in 2012

In 2011, Gatwick handled around 88,100 tonnes of cargo. The vast majority of air cargo is carried in the holds of passenger aircraft and tends to be high value goods and perishables with tight sell-by dates. The air cargo movements are to and from the Cargo Centre and are mainly by road using HGVs for the onward travel of goods to/from UK destinations. However these movements account for no more than 1% of the total traffic using the M23 spur, the primary cargo route to and from the airport, with many such movements transferring via Heathrow.

The other main type of HGV and LGV movement is deliveries to the various areas on-airport; this is mainly supplying the retail and catering businesses in the North and South Terminals.

Logistics activity in the future

In 2012, Gatwick expects 130,400 tonnes of cargo to be transferred through Gatwick. Due to the very nature of the goods being high value and often perishable we expect this to continue to be transported by road.

Other airports around the world have consolidated their logistics functions for deliveries by rationalising stores facilities, delivery routes/processes and access points across to the airside environment. Whilst this is an attractive proposition, it is technically complex to deliver.

LOGISTICS

STRATEGIC PRIORITIES

To increase value and efficiency of the airport logistics function by investigating the opportunities for consolidation.



FIVE



SAFE AND SUSTAINABLE

At Gatwick we place great emphasis on reducing the environmental impacts that result from the airport's operation and we are proud of our recent achievements. In 2010, we published 'Decade of Change' which explains our 10-point plan for operating, developing and growing Gatwick in a sustainable manner.

One of our key airport strategic priorities to support our ambition to be London's airport of choice is to build a strong environmental, health and safety culture.

Climate change and carbon reduction

Gatwick, and the wider UK aviation community, accept that climate change is a reality. We have a responsibility to play our part in reducing its effects, and we are doing all we can to achieve this in conjunction with our industry partners. In addition, we are a mandatory participant in the Carbon Reduction Commitment (CRC) energy efficiency scheme.

We calculate, report and publish the findings of our annual carbon footprint and this process is carried out by an independent third party. Our carbon footprint methodology is sector leading and follows the Greenhouse Gas (GHG) protocols covering all three scopes (Figure 30).

The most recent carbon emissions data relates to 2010 (Table 8) and emissions from surface access are categorised in Scope 3. They account for around 30% of total emissions.

Through this ASAS, we are supporting the airport's carbon reduction programme by encouraging passengers and staff to use more sustainable public transport modes and by reducing congestion which leads to unnecessary fuel use by road vehicles. The CO₂ per passenger km for the main transport modes are 110g for car, 60g for rail and 28g for coach.

ISO14001 accreditation

In 2010, we secured the Carbon Trust Standard for our approach to carbon management, as well as the international accreditation ISO14001 for environmental management, making us the largest UK airport to have both accreditations in the same year. In 2011, we also achieved the ACI Carbon Accreditation Scheme.

Air quality management

Gatwick measures on-airport air quality continuously and has been doing so since 1992. The primary source of air pollution at Gatwick is emitted by aircraft, with the take-off operation being the largest contributor to those aircraft emissions. Emissions from road vehicles, within the airport and on the surrounding road system, are the second largest source of air pollution. However, a significant proportion of the road journeys in the vicinity of Gatwick are not related to the airport.

We have a set of implementation plans designed to deliver our decade of change sustainability targets.

Energy management plan

The introduction of solar powered technology has continued across the landside road environment at Gatwick. The introduction of this technology has meant a reduction in energy usage and disruption to our road network. We will seek to expand the use of alternative sustainable energy sources to support our surface access infrastructure.

As more electric cars enter the market and are used - recharging points will become more widespread and more will be introduced on airport to meet demand.

TABLE 8 GATWICK AIRPORT - 2010 CARBON FOOTPRINT

	2010 GREEN HOUSE GAS EMISSIONS (tCO ₂ e)
Scope 1	16,499
Scope 2	79,106
Scope 3	625,897
Total	721,502

Figures verified by RSK

Safety

Safety in surface transport broadly falls into two areas - protection from an accident or incident and security.

Two of the dominant factors affecting the airport are security requirements and statutory regulations. These affect surface transport areas such as the forecourts, access roads and car parks. These requirements affect how the surface transport areas can be used, can lead to the need for infrastructure development and, influence the form and character of the airport facilities.

Safety from accidents and incidents particularly in a traffic environment is governed principally by the Highways Regulations and within facilities the Health and Safety Regulations. The core approach by Gatwick is to have a comprehensive strategy to manage these risks. For accidents and incidents these are based on leadership and behaviours, effective management systems, assurance systems and performance measurement.

The airport has achieved the OHSAS 18001 for its assurance initiatives and has implemented the Destination Zero program of inspections.

In surface transport both Gatwick and the operators take a lead in ensuring passenger safety, this includes managing and inspecting areas and driving performance.

For the road environment established road safety techniques are used to monitor, analyse and prevent road accidents.

SAFE AND SUSTAINABLE

STRATEGIC PRIORITIES

Build a strong environmental, health and safety culture through joint working and cooperation with surface transport stakeholders.

FIGURE 30 GREENHOUSE GAS PROTOCOL CARBON FOOTPRINT SCOPES

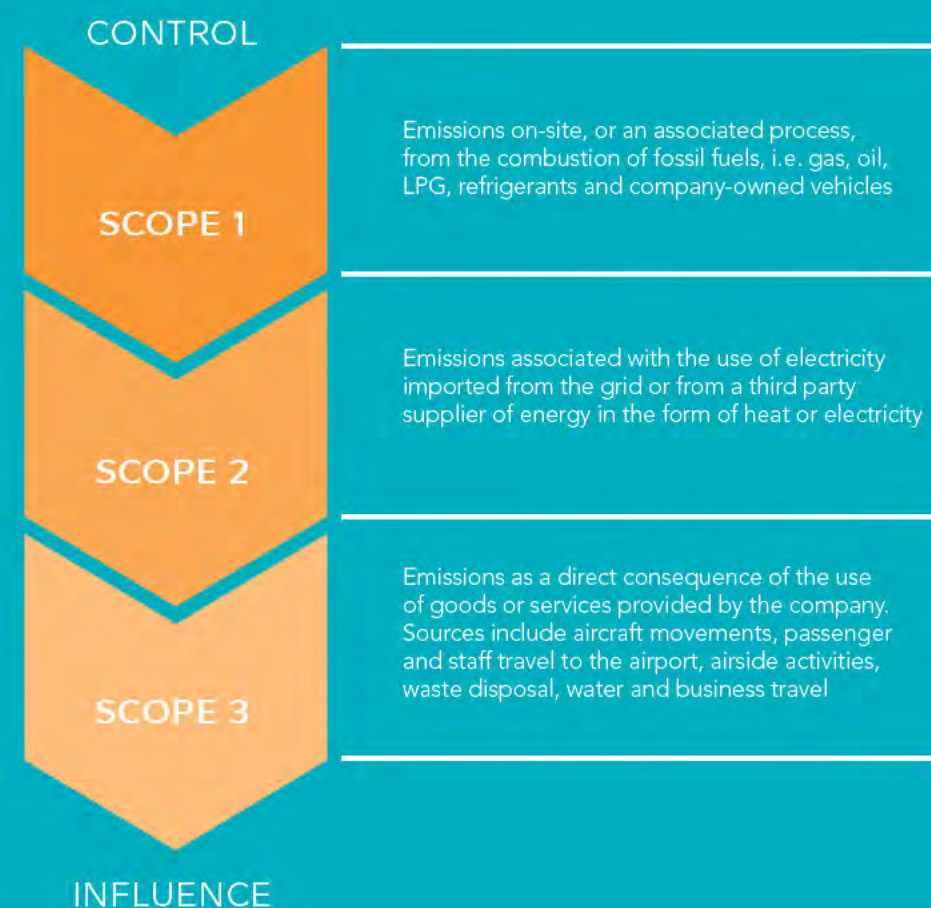
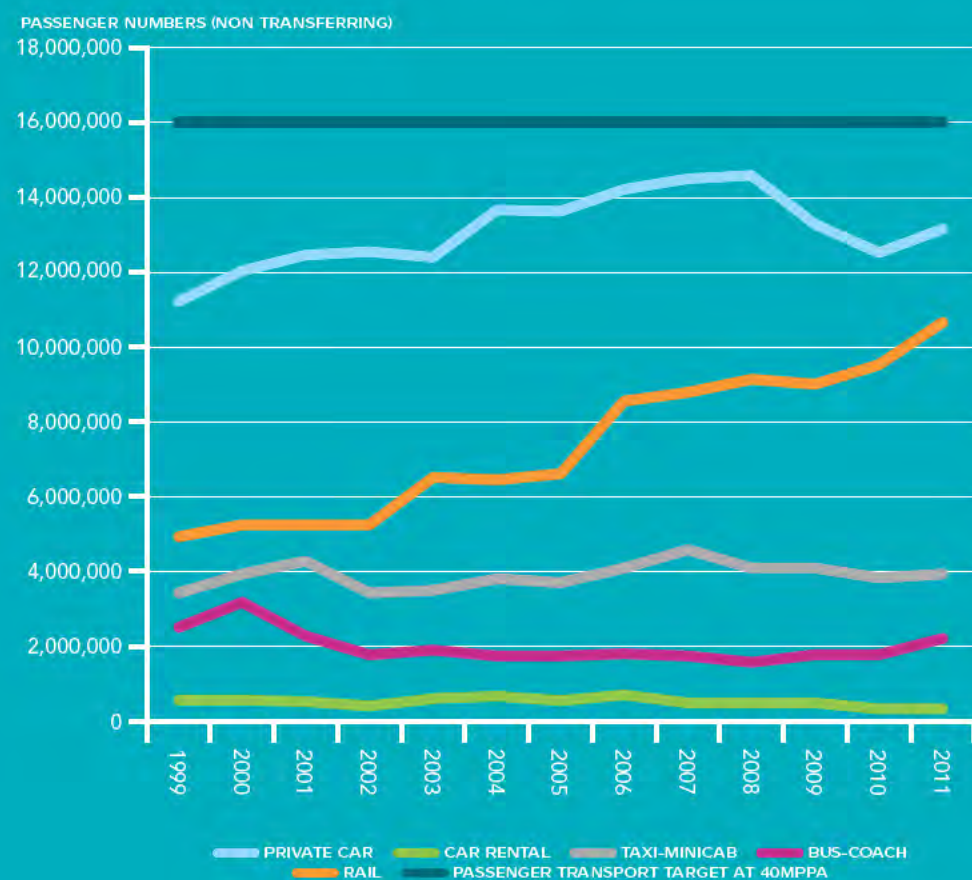




FIGURE 31 VOLUMES OF PASSENGERS BY TRAVEL MODE 1998-2011



In order to be successful we are keen to set challenging but realistic targets, to understand how we are performing and to be continually looking forward to the next change.

Air passengers

The airport has an existing target of 40% of passengers using public transport by the time it reaches 40mppa (forecast around 2021). To achieve this target a further 4mppa will have to use public transport (Figure 31). Whilst some of this will be achieved by the mix of air passengers (foreign/UK resident) in the long term the mix is not expected to change significantly from around 70% UK resident and 30% foreign residents.

This poses a significant challenge and the input and value achieved by an effective Transport Forum is more valuable than ever, not only maintaining the existing mode share as well as the target already set. For this reason the 40% mode share target by 40mppa will remain the Airports primary mode share target.

However, we recognise that in a long term strategy that a stretch target is of value when the 40% mode share target at 40mppa has been reached. We have identified through the additional measures set out in this ASAS that our rail strategy could contribute a further 3% mode share if delivered and our bus and coach strategy and associated promotional/passenger initiatives could contribute a further 2% mode share. From our modelling we believe we would see around a 5% mode share reduction in the drop off/pick up category. We therefore believe that a reasonable stretch target would be 45% beyond 40mppa, which would require a further 2 million passenger per annum to use public transport which would total 18 mppa in total.

The Airport also has a number of transport corridor targets (Table 9) and performance against these is very good in some areas, whilst in others further effort is required. The Transport Forum Steering Group will review these targets as the Action Plans are developed.

INNOVATION THROUGH CHALLENGING TARGETS

TABLE 9 2011 AIR PASSENGER TRANSPORT MODE SHARE AND TARGETS

CORRIDOR	2011 PUBLIC TRANSPORT MODE SHARE	40MPPA TARGET
Central London	82.1%	90%
Kent	9.5%	15%
Brighton and Hove	46.1%	50%
Rest of Sussex coast	29.2%	25%
M3 (Hampshire/Dorset)	29.5%	20%
M4/M40 Thames Valley and beyond	29.3%	30%

TABLE 10 2012 PUBLIC TRANSPORT CORRIDOR MODE SHARE AND TARGETS

TRANSPORT CORRIDOR	2012 PUBLIC TRANSPORT	PUBLIC TRANSPORT TARGET
Crawley/Horley	34%	40%
Croydon, Bromley and Merton	37%	45%
Brighton and on Sussex coast	22%	30%

Employee travel

In 2010, in agreement with the Steering Group of the Gatwick Area Transport Forum, the public transport mode share target for staff was increased from 20% to 40% by the time the airport reaches 40mppa.

Following the 2012 Staff Travel Survey, we identified that the overall public transport mode share percentage had remained static for the period between 2007 and 2012 (Appendix 1, Table 3). This can also be broken down into corridors (Table 10) along with individual targets.

The performance in this area has prompted a radical rethink about how we deliver staff travel initiatives at Gatwick and in 2012 we initiated this process. The mode share target agreed in 2010, remains challenging.

Performance

In order to track our progress we use a range of data which helps us to measure the progress we are making towards achieving these targets. This is considered and used to monitor our progress by the Airport and the Transport Forum Steering Group. In addition to this, a separate audit takes place and progress is reported in the Corporate Responsibility Report.

The data sources we use are:

- CAA surveys
- travel-to-work surveys
- ad-hoc surveys
- Quality Management Surveys (QSM) of transport services and facilities.

Looking forward

To deliver our targets, every 5 years a new Surface Access Action Plan will be drawn up using the strategic priorities set out in this ASAS. The next Action Plan will be developed in 2012/13 by the Transport Forum Steering Group and this will replace the 2011 Action Plan.

At the heart of everything we do will be 'user centric' design and looking towards innovation to deliver the next change.

Targets

Our overarching targets for this ASAS are to:

- achieve 40% public transport mode share for air passengers and staff by the time the airport reaches 40mppa
- achieve a stretch target of 45% public transport mode share once the 40% target at 40mppa has been achieved
- achieve a quality service rating of 4.5 (1 is lowest, 5 is the highest) for all surface access transport modes and facilities by the time the airport reaches 40mppa.

In delivering the ASAS and its targets we will significantly contribute to our overall ambition to 'compete to grow and become London's airport of choice'.

APPENDICES

APPENDIX 1

TABLE 1 FINAL % MODE SHARE OF AIR PASSENGERS TRAVELLING TO GATWICK AIRPORT 1998-2011 (CAA)

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Private Car	51.7	49.1	49.6	50.3	53	50.5	51.5	51.3	48.2	47.7	48.3	46.1	44.3	42.4
Car Rental	2.2	2.7	2.6	2.1	1.9	2.6	2.4	2.3	2.3	2.0	1.8	1.7	1.6	1.8
Taxi/Minicab	14.8	15.2	16.0	17.1	14.7	14.5	14.5	14.1	14	14.8	13.6	14.3	13.4	13.3
Bus/Coach	10.3	10.9	10.0	9.1	7.9	7.3	6.8	6.7	6.2	6.1	5.3	6.2	6.6	6.7
Rail	20.4	21.7	21.5	21.2	22.3	24.9	24.5	25.2	29.1	29	30.4	31.2	33.8	35.5
Other	0.1	0.4	0.2	0.2	0.2	0.1	0.2	0.3	0.3	0.3	0.5	0.4	0.3	0.3
Public transport	30.7	32.6	31.5	30.3	29.2	32.2	31.3	31.9	35.3	35.7	35.7	37.4	40.4	42.2

TABLE 2 PUBLIC TRANSPORT % MODE SHARE BY TRANSPORT CORRIDOR 2006-2011 (CAA)

	2006	2007	2008	2009	2010	2011
1 - Central London	76.3	77.0	77.4	77.5	79.0	82.1
2 - Kent	12.2	9.8	12.1	8.4	11.1	9.5
3 - Sussex Coast	21.9	22.7	24.9	25.2	29.4	29.2
4 - Brighton and Hove	39.6	51.3	50.8	51.5	48.2	46.1
5 - M3	17	17.2	20.9	18.7	25.0	29.5
6 - M4 / M40	26.3	27.5	26.4	27.7	30.4	29.3

TABLE 3 AIRPORT EMPLOYEE TRAVEL TRENDS 1997-2012

	1997	2003	2008	2012
Total employees	25,600	24,600	22,700	21,109
Car driver %	78	76	65	65
Car passenger %	5	3	4.3	4.5
Rail %	8	10.5	11.4	11.4
Bus/Coach %	9	6	13.2	11.8
Taxi %			1.6	0.9
Company transport %			1.2	1.2
Walk %	1		0.8	1.0
Motorcycle %			0.6	0.7
Bicycle %			0.8	1.6
Plane %			0	0.6
Other %			0.9	0.4

TABLE 4 EXPRESS COACH SERVICES IN 2012

SERVICE	ROUTE	KEY DESTINATION	HOURS OF OPERATION	DAILY DEPARTURES
National Express	025	Eastbourne - Brighton - Gatwick S - Coulsdon - Mitcham Junction - Streatham - Stockwell - Vauxhall - Victoria	24 hours	16
National Express	A3	Victoria (London) - Vauxhall - Stockwell - Streatham - Mitcham - Sutton - Gatwick S	24 hours	22
National Express	200	Bristol - Gatwick N and S	05:45-23:30	7
National Express	201	Swansea - Gatwick N and S	24 hours	10
National Express	206	Poole - Bournemouth - Gatwick S and N	24 hours	10
National Express	210	Wolverhampton - Gatwick N and S	24 hours	9
National Express	222	Hereford - Gatwick N and S		2
National Express	230	Derby - Gatwick N and S	24 hours	8
National Express	240	Bradford - Gatwick N and S		3
National Express	707	Nottingham - Gatwick N and S	24 hours	9
National Express	747	Brighton - Gatwick S and N - Heathrow	24 hours	19
National Express	797	Cambridge - Stansted - Gatwick N and S	24 hours	10
easyBus	EB4	Earls Court	24 hours	96
Oxford Airline	OXF	Oxford - Heathrow - Gatwick N and S	24 hours	20
Gatwick Flyer	GF	Barkingside - Chingford - Southend - South Woodham Ferrers - Gatwick	24 hours	12
Witney Shuttle	1	Stow-on-the-Wold - Witney - Gatwick N and S	24 hours	9

TABLE 5 LOCAL BUS SERVICES

OPERATOR	ROUTE NUMBER	ROUTE	DAILY DEPARTURES
Metrobus - Fastway	10	Gatwick N - Gatwick S - Crawley - Bewbush	134
Metrobus - Fastway	20	Langshott - Horley - Gatwick S - Broadfield	91
MetroBus - Fastway	100	Redhill - Gatwick N - Gatwick S - Crawley - Maidenbower	97
Metrobus	200	(Gatwick North Terminal selected journeys only) - Gatwick South Terminal - Bewbush - Horsham	40
Metrobus	300	Gatwick North Terminal - Gatwick South Terminal - ffield West	2
Metrobus	400	Caterham - Redhill - Gatwick South Terminal - East Grinstead	25
Metrobus	526/527	Crawley - Charlwood - Gatwick S - Horley - Smallfield	22

APPENDIX 2

S106 Planning commitments and obligations

Gatwick Airport Limited signed a new legal agreement with WSCC and CBC in 2008. The agreement outlines how the airport's operation, growth and environmental impacts will be managed responsibly. It underpins the important relationship between the airport owner and its local authorities with responsibility for planning, environmental management and highways. The new legal agreement, reached after a process of consultation and discussion with a wide range of stakeholders, contains far-reaching objectives and obligations.

The principal objectives which are contained in the legal agreement are:

- the desire to see the airport continue to grow within the timeframe of the agreement to the annual throughput of 40 million passengers forecast in the Interim Master Plan in a one runway, two terminal configuration;
- the need to ensure that, as the airport grows, measures are in place to minimise, so far as possible, its short and longer term environmental impacts;
- and the importance of maintaining and enhancing the ways in which the parties to the agreement share information and work together, and with other stakeholders, to bring significant benefits to the airport and the communities it serves and affects.

The Section 106 agreement requires us to review the terms of the agreement no later than 31st December 2013 or when we reach a throughput of 38mppa (whichever is the sooner). This will be undertaken in the light of the growth expectations existing at the time of the review which may include the prospect of growing beyond 40mppa.

The Surface Transport conditions and obligations are:

- hold an annual meeting of the Gatwick Area Transport Forum and meetings of the Transport Forum Steering Group at quarterly intervals unless agreed otherwise.
- hold an annual meeting of the Gatwick Area Transport Forum and meetings of the Transport Forum Steering Group at quarterly intervals unless agreed otherwise.
- to maintain an Airport Surface Access Strategy and:
 - by 31 December 2008 to publish the Supplemental Report on Commitments referred to in the Airport Surface Access Strategy; and
 - review update and publish the Strategy by 31 December 2012 or to coincide with and support any material review of the Interim Master Plan, if that is sooner.
- The Company will support initiatives (such initiatives to be the subject of consultation with the Gatwick Area Transport Forum the County Council and the Borough Council) which promote in accordance with the Airport Surface Access Strategy the use by passengers and staff travelling overland to and from the Airport of modes of transport other than the private car and with regard to staff travel the encouragement and promotion of car sharing.
- The funds provided for such initiatives in each calendar year from 2009 to 2015 will be based on the sum of:
 - a monthly charge amounting to £10 per annum for each pass validated for entry to a staff car park operated by or on behalf of the Company
- a levy on the total supply of spaces in public car parks operated or available for operation by or on behalf of the Company on 30 September in the preceding year at the rate per space of:
 - £23.50 in 2009
 - £24.25 in 2010
 - £25.00 in 2011
 - £25.75 in 2012
 - £26.50 in 2013
 - £27.25 in 2014
 - £28.00 in 2015

- unless otherwise agreed with the County Council and the Borough Council the Company shall:
 - each year invest in the chosen initiatives no less than 50% of the funds provided that year and of those carried over from the preceding year; and
 - by the end of the period of seven years have used no less than 50% of total funds to support the introduction or operation or use of bus services that promise to facilitate a material increase in the proportion of airport staff or air passengers choosing to use public transport for their surface journeys between the Airport and neighbouring communities.
- to work with Network Rail and other stakeholders to assist the planning and implementation of a project to redevelop the railway station serving the Airport in a manner which is in conjunction with the Company's proposals for South Terminal and its landside infrastructure including that serving Fastway and other local bus services provides the Airport with an efficient transport interchange suiting the needs of all users.
- in the event of Network Rail not committing to funding the development of a new railway station and concourse in accordance with the infrastructure investment plan agreed with the Office of Rail Regulator (ORR) as part of Network Rail's outputs for the Control Period 4 (2009 - 2014) the Company whilst engaging with airlines shall devise and by March 2013 implement appropriate plans to enhance the South Terminal's forecourt area with particular emphasis on:
 - its interface with the South Terminal;
 - the provision of waiting facilities for coach passengers; and
 - the accessibility of facilities serving local buses.
- restrict the use of the Airport entrance/exit at Povey Cross to buses, emergency service vehicles, Airport operational users and a maximum of 675 staff car park pass holders, subject to these users satisfying the criteria specified in Appendix 2* to this Agreement and to report annually on the number of passes issued to staff and readily available data on vehicular use of the entrance/exit.

- having regard to the Company's Car Parking Strategy: Provide sufficient but no more on-Airport public car parking spaces than necessary to achieve a combined on and off airport supply that is proportionate to 40% of non-transfer passengers choosing to use public transport for their journeys to and from the airport when annual passenger numbers reach 40 million. Provide sufficient but no more Company managed on-airport staff car parking spaces than is consistent with the mode share targets detailed in the Airport Surface Access Strategy 2007 and subject to working with stakeholders to revise the local bus target in line with agreed service enhancements.
- The Company will actively engage with the Local Highway Authorities with the objective that by 30 September 2009 they will have:
 - reached agreement on the location and characteristics of such improvements to the highway access to the Airport as may be justified by growth in the volume of Airport related traffic since 2001 and on the anticipated timeframe for their implementation; and
 - subject to there being reliable estimates of the costs of the said improvements, have agreed the financial contributions that the Company is to make towards the cost of the agreed works.
- The Company agrees that prior to the commencement of the calendar year in which the works are to be carried out it will use reasonable endeavours to enter into appropriate agreements with the relevant Local Highway Authority for the works concerned.
- The Company in consultation with the Transport Forum Steering Group will by 31 December 2009 and as and when it subsequently publishes an updated Surface Access Strategy produce a Surface Access Action Plan containing a prioritised programme of activities pursuant to such Strategy.
- The Company's annual monitoring report will review the delivery of the action plan produced and reviewed in accordance with The Action Planning Obligation.

- maintain and promote an Airport Wide Staff Travel Plan (ATP); this shall include:
 - producing an action plan to facilitate and promote sustainable travel to/from work, also for business travel, modes including car sharing, public transport options, and cycling and walking;
 - securing the active participation of other airport companies in the promotion of the ATP to their employees; and
 - carrying out regular monitoring to determine the effectiveness of the various initiatives that comprise the ATP, including periodic staff surveys at intervals no greater than every five years.
- work with Transport Forum partners to maintain and improve local bus accessibility to, from and within the airport, including possible extensions to the Fastway network.
- work with Transport Forum partners to:
 - develop the cycling and pedestrian network linking Gatwick Airport to the surrounding area;
 - maintain and develop the network within the airport; and
 - market the cycling and walking options to airport staff.
- work with bus and coach and train operators to maintain current and develop further initiatives to encourage the greater use of bus, coach and rail services for journeys to and from the airport by airport staff.
- provide no more Gatwick Airport managed on-airport staff car parking spaces than is consistent with achievement of the following travel to work mode share targets:
 - 20% of staff living in Crawley/Horley to use Fastway by 2008 and to work towards a revised local bus target that reflects improvements in the local route network;
 - 45% of staff living in South London (Croydon, Bromley and Merton) to travel by public transport by 2015; and
 - 30% of staff living in Brighton and along the South Coast to use alternatives to single use private car by 2015.

- develop an action plan and review it no less frequently than every three years to improve the onward travel offer for air passengers, including way finding, provision of information, and development of the Company's website.
- work with Rail and Coach operators to:
 - identify and implement marketing strategies and campaigns aimed at increasing air passenger use of rail and coach services to and from the Airport; and
 - where appropriate identify opportunities for potential new/ complementary routes and/or extended hours of operation to facilitate this.
- to restrict and discourage 'kiss-and-fly' and 'meet-and-greet' traffic on the forecourt through a combination of:
 - proactive traffic management of the forecourts;
 - working with transport operators and other stakeholders to promote public transport choices;
 - offering a range of quality, value-for-money on-airport parking products;
 - investigating the feasibility of implementing a road access charging scheme for the Airport; and
 - exploring with stakeholders the feasibility of 'strategic park-and-ride' at one or more off-airport locations.
- to provide a safe and efficient landside roads and forecourts network that aims, in the context of security requirements, to minimise congestion and, where practical, affords priority to users of public transport.

APPENDIX 3

Surface Transport improvements

First Airport Surface Access Strategy	2000
Gatwick Direct bus service	2000
Cycle route 21 (Horley - Gatwick - Crawley)	2000
Discounted travel introduced for staff	2000
Airport Car share scheme launched	2001
Cycle storage introduced north and south terminals	2001
Fastway bus scheme Phase 1 (Crawley and Horley)	2003
Oxford Airline express coach service	2003
24 hour Fastway bus services introduced	2004
2nd Airport Surface Access Strategy	2004
Fastway bus scheme Phase 2 (Horley)	2005
Car park 2 refurbished	2005
Gatwick commuter launched	2006
First Capital Connect take over Thameslink Franchise	2006
Car park 3 refurbished	2006
Staff Travel Survey	2007
Car parks 1 and 5 refurbished	2007
3rd Airport Surface Access Strategy	2007
Surface Access Supplementary Report	2009
Surface Access Action Plan	2009
Car Park 6 built	2010
South Terminal Forecourt and Passenger Transport Interchange	2011-2012
North Terminal Forecourt and Passenger Transport Interchange	2012
Gatwick Airport Rail Station Concourse	2012
Gatwick Airport Rail Station - Platform 7 and associated works	2012-2013
Passenger way finding and direction signing	2012
Further cycle parking introduced	2012
Airport Surface Access Strategy 'Access Gatwick'	2012

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Future section (Pages 8-21):

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