



GATWICK AIRPORT DRAFT MASTER PLAN 2018

CONSULTATION
DOCUMENT

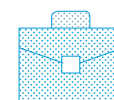
YOUR LONDON AIRPORT
Gatwick

HOW TO USE THIS DOCUMENT

1. The purpose of this document is to provide a summary of our draft master plan 2018. This highlights the key non-technical information in the draft master plan and points you towards where you can find out more information.
2. In the coming weeks we will be hosting a number of public exhibitions in the local community and would encourage you to attend to find out more information. Further details on the exhibition events and consultation can be found towards the end of this document in the Consultation process section.
3. The images and plans used in this consultation document have been taken from the draft master plan in order to provide additional context. For larger copies of the plans (with the keys), and a glossary of terms please refer to the full draft master plan document available at gatwickairport.com/masterplan2018.

INTRODUCTION

4. Gatwick has been transformed under new ownership since 2009. It has become a key element in the country's national infrastructure, an economic engine for local and regional growth and the airport of choice for millions of passengers. It contributes £5.3bn to the UK economy and supports over 85,000 jobs. At peak times it is the busiest single-runway airport in the world and is ranked 12th in the world for the number of long-haul destinations served.
5. Gatwick's last master plan was published in 2012. This acts as a point of reference for ongoing development and growth at the airport. We are publishing a new draft master plan now to explain our latest thinking on how the airport can meet the growing demand for air travel and provide Britain with enhanced global connectivity.
6. While we have not completed all of our technical studies in respect of scenarios presented in this draft master plan, the Department for Transport's guidance on the preparation of airport master plans encourages airports to engage with their stakeholders at an early stage even if the full facts are not known.
7. We wish to bring our wide range of stakeholders up to date with our present thinking on how we see Gatwick developing over the next 5 years.
8. In a time where demand for air travel continues to outstrip capacity, we look ahead to 2032 and present three potential growth scenarios for the airport's longer term future.
9. Our draft master plan also explains how we intend to do everything we can to develop and grow in a sustainable way, creating the right balance between economic growth and environmental impact.



SUPPORTS

85,000

JOB IN THE UK



CONTRIBUTES

£5.3bn

TO THE UK'S GDP



24,000

PEOPLE EMPLOYED
AT THE AIRPORT ITSELF

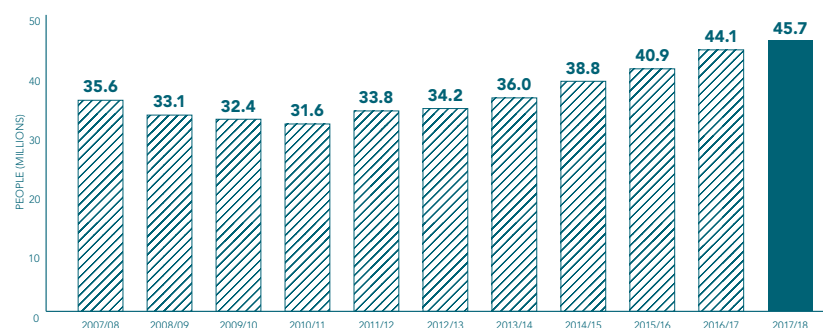
GATWICK TODAY

10. In 2017/18 Gatwick handled 45.7m annual passengers, almost 12m more passengers than when our last master plan was published in 2012 – achieving a higher growth rate than any other UK airport over this period. The airport currently serves 233 destinations, more than any other airport in the UK, across long-haul, short-haul and domestic routes.
11. Gatwick is unique amongst London's airports as it accommodates significant numbers of low-cost, full-service, charter and regional airlines. This broad range of carriers helps support a large route network. Gatwick is the largest base for easyJet, which accounted for 18.5m passengers in 2017/18. However, we are also home to a wide range of other airlines reflecting the diverse markets and passenger types using Gatwick.

12. In 2017/18 Gatwick handled over 282,000 aircraft movements. We play host to many of the newest aircraft types in the industry, with low-cost carriers typically maintaining a young fleet: for example, easyJet has started introducing the new A321 Neo into its Gatwick fleet with more fuel-efficient and quieter engines. In 2017/18 Gatwick handled just over 102,000 tonnes of cargo – a 24% increase on the previous year, driven by the additional long-haul services.

For more information about this section please view Chapter 2 of the draft master plan.

FIGURE 2.2: GATWICK AIRPORT PASSENGERS (M)



SOURCE: GATWICK AIRPORT



PLAN 5 - Key Features

DEVELOPMENTS IN THE AVIATION INDUSTRY

13. Demand for air travel is forecast to continue growing. The Department for Transport's most recent forecast (October 2017) shows demand for air travel in the UK rising from 267mppa in 2016 to 355mppa by 2030 and 495mppa by 2050. Capacity constraints (which are principally felt in the South East of England) would, however, limit throughput to well below these levels.
14. At Gatwick we expect to see the continuing growth of low-cost carriers. In the last ten years we have seen passengers on these services growing from less than 30% of our total passengers to 62% today. We also expect to see further growth in long-haul markets where we have seen strong performance recently.
15. We know that more airlines would use Gatwick if runway slots were available. Consequently, we have been considering how we could maximise Gatwick's ability to meet this growing demand in the medium and longer term. Indeed, the Government recently published a policy document titled 'The future of UK aviation: making best use of existing runways' which sets out its thinking on how airports should make best use of their existing runways whilst balancing their economic benefits and environmental impacts. This policy document forms part of the Government's work to develop a new Aviation Strategy.
16. We have been working on two scenarios which are explained below which enable growth at the airport in a manner consistent with this policy. However, we are not actively pursuing plans for constructing an additional runway to the south in light of the Government's Airports National Policy Statement which supports a new runway at Heathrow.

For more information about this section please view Chapter 3 of the draft master plan.

MASTER PLAN FOR THE NEXT 5 YEARS

17. Through a combination of greater use of the airport in the off-peak periods, more intensive use of the runway at the peak periods, and a shift to larger aircraft and higher load factors, Gatwick has grown to a level of throughput much higher than originally envisaged. We now believe that these same factors will enable the single runway airport to grow over the next 5 years to 53mppa.
18. We believe this growth can be delivered at the same time as fulfilling our Decade of Change Sustainability Strategy and with a smaller noise footprint than exists today.

OUR CAPITAL INVESTMENT PROGRAMME

19. Our 2018 Capital Investment Programme (CIP) contains development projects with expenditure amounting to £1.11 billion through to 2022/23, with £266 million planned for 2018/19 alone. The projects assume that during this period Gatwick will grow to a throughput of 53mppa.
20. The CIP contains many projects that will continue the transformation of Gatwick, delivering higher levels of passenger service and more efficient, resilient and sustainable operations. These include a major upgrade to the rail station, an extension to Pier 6, expanded departure lounges and a new hangar.

FIGURE 5.1: GATWICK GROWTH WITH EXISTING MAIN RUNWAY

	ACTUAL 2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Passengers (M)	45.7	47.1	49.1	50.6	52.0	52.8
ATMs (Air Transport Movements)	280,790	284,270	289,770	294,490	297,670	300,000
Passengers per ATM	162.7	165.7	169.4	172.0	174.7	176.0

OUR AIRPORT SURFACE ACCESS STRATEGY

21. In May 2018, Gatwick Airport published its new Airport Surface Access Strategy (ASAS), a five-year plan setting out a vision for sustainable access to and from Gatwick. Access to and from the airport is an essential part of Gatwick's ambition to grow and become London's airport of choice.
22. Although not a statutory document, the ASAS sets out important targets and action plans, which will be monitored by key stakeholders and provide the focus of activity for Gatwick's Surface Transport Team.

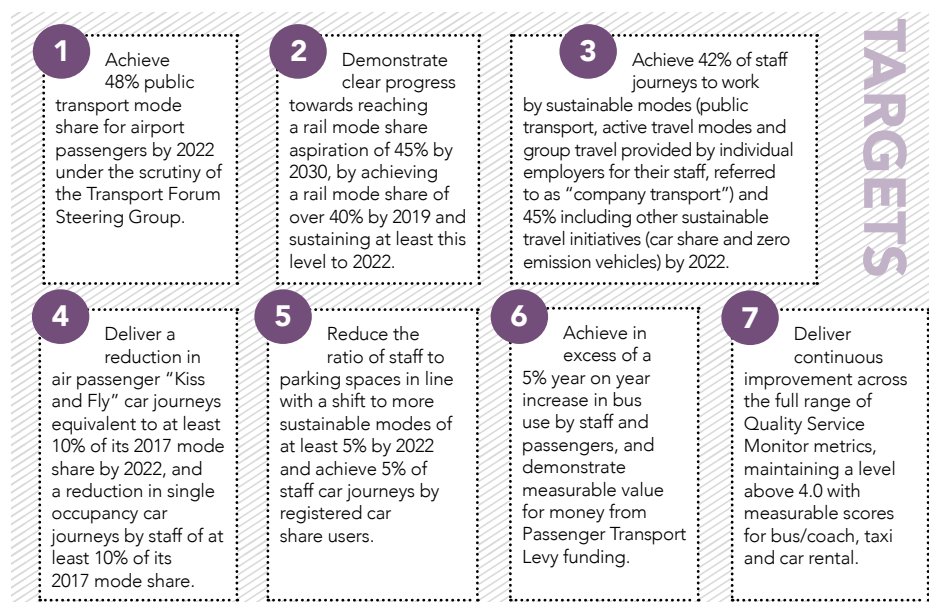
23. Our surface access vision is: 'To provide safe and sustainable access for all airport users, without compromising quality or choice, and to provide for growth while supporting the needs of our local communities, economy and environment.'
24. Rather than repeat the full ASAS here, we instead summarise the ASAS targets below and invite readers to explore the full strategy document which can be found at gatwickairport.com/surfaceaccess.

For more information about this section please view Chapter 4 of the draft master plan.



PLAN 9 - Airport Layout - 2022

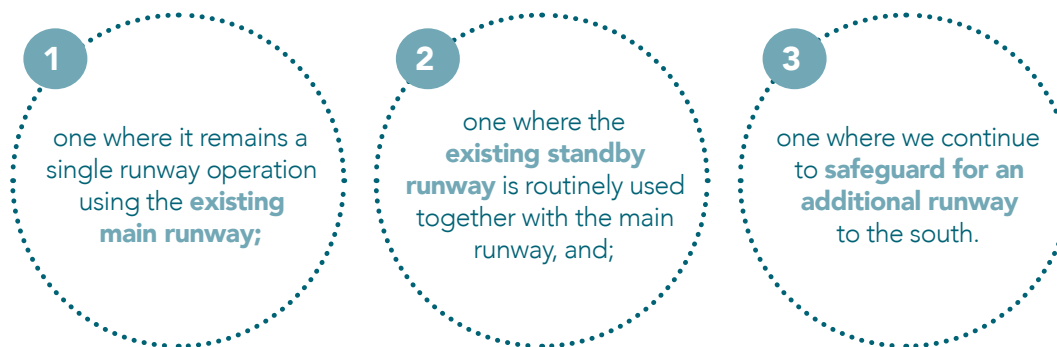
(Additional infrastructure compared to today)



GROWTH SCENARIOS – LOOKING 5 TO 15 YEARS AHEAD

25. Chapter 5 of the draft master plan looks forward to 2032 and describes three scenarios for the airport's longer-term future which – used either separately or in combination – could enable Gatwick to grow to meet the increasing demand for air travel.

26. These scenarios are not exclusive choices



EXISTING MAIN RUNWAY

27. If the airport continues with the existing single runway operation we believe that by 2032 Gatwick could be processing between 57 and 61mppa. This level of throughput, which is higher than previous estimates, will be partly delivered through new air traffic management technologies and processes which should allow some additional peak hour runway capacity to be released. Growth will also result from further increases in the average size of aircraft and additional flights outside the current peak times. This means that while some additional infrastructure will be required, for example car parking, the changes needed to the airport would be relatively modest and there would be no change required to the airport boundary.
28. With the introduction of quieter aircraft, in this scenario we expect to see Gatwick's noise footprint continue to reduce despite the increase in aircraft movements.



PLAN 18 - Airport Layout Main Runway - 2032
(Additional infrastructure compared to 2022)



EXISTING STANDBY RUNWAY

29. A higher level of growth would be possible if we bring the existing standby runway into regular use (for departing flights only). The standby runway is currently used only when the main runway is temporarily closed. Our 1979 Section 52 Agreement¹ with West Sussex County Council precludes the simultaneous use of both runways. This agreement expires in 2019. By operating both runways simultaneously, we would be able to add between 10 and 15 additional hourly aircraft movements in the peak hours, which could deliver between 68 and 70 million passengers by 2032.
30. The airfield would need some reconfiguration and some additional support infrastructure would be required including improvements to the road junctions serving North and South Terminals. However, we expect to keep the airport development within the airport's existing footprint and the airport would remain a two-terminal operation.
31. Preliminary results of our initial analysis show that aircraft noise generated by this scheme would be broadly similar to today's level and the airport's growth would not cause the breach of any air quality limits in the local area.
32. This scheme would make best use of our existing runways and provide Gatwick with a growth scenario which offers capacity and resilience benefits but without the scale of change required for the full additional runway scheme we

submitted to the Airports Commission. It would provide the country with much needed additional airport capacity and would promote greater competition between airports, which has been proven to deliver benefits to the consumer.

33. If we decide to take forward this scheme, it is likely that planning permission would need to be obtained through the Development Consent Order process – in which case,

formal consultations would be undertaken based on a more complete understanding of the implications than is available at this stage. This consultation might take place during 2019. We believe that preparing for and completing this consent process would take up to five years and, allowing for the necessary construction activity, the standby runway could be brought into use alongside the main runway in the mid-2020s.

FIGURE 5.5: GATWICK GROWTH WITH STANDBY RUNWAY

	ACTUAL 2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2027/28	2032/33
Passengers (M)	45.7	47.1	49.1	50.6	52.0	52.8	65 – 67	68 – 70
ATMs (Air Transport Movements)	280,790	284,270	289,770	294,490	297,670	300,000	360,000 – 365,000	375,000 – 390,000
Passengers per ATM	162.7	165.7	169.4	172.0	174.7	176.0	Around 180	Around 180

FIGURE 5.4: THE USE OF BOTH EXISTING RUNWAYS FOR DEPARTURES



PLAN 19 - Airport Layout Standby and Main Runway - 2032
(Additional infrastructure compared to 'main runway only' in 2032)

¹1979 Agreement with West Sussex County Council not to build a second runway, or operate the standby runway simultaneously with the main runway.

SAFEGUARDED ADDITIONAL RUNWAY TO THE SOUTH

34. Although the Government's Airports National Policy Statement supports a third runway at Heathrow, we believe an additional Gatwick runway, built to the south, should continue to be safeguarded. We believe it is in the national interest to preserve this opportunity to build a new runway in the south east to meet longer term demand growth. DfT's forecasts show that by 2025 the main London airports, with the exception of Stansted, are expected to be effectively full and that, even with a third runway at Heathrow, UK airport capacity constraints will be apparent by 2030 and in subsequent years.
35. An additional runway could be delivered within approximately ten years of starting the planning process and would take Gatwick's capacity to approximately 95mppa. This is a much higher capacity scheme,

requiring more significant changes to the airport and surrounding roads. While it would maximise the economic benefits Gatwick brings to the region, it would increase environmental impacts and, for that reason, our additional runway proposal submitted to the Airports Commission included both mitigation and compensation measures.

36. Taking the decision to safeguard the additional land required to support an additional runway at Gatwick does not mean that we will be starting work to plan, construct or develop the runway. This is simply to ensure that if we decide an additional runway will benefit the UK's future airport capacity we will not be prevented from planning and developing this runway in the future because of other development in the meantime.

For more information about this section please view Chapter 5 of the draft master plan.



PLAN 20 - Airport Layout Additional Runway



ENVIRONMENTAL STRATEGIES

37. Regardless of the development scenario selected, we remain committed to operating and developing Gatwick in a sustainable way. We will continue to use our Decade of Change Sustainability Strategy to drive efficiency improvements and reduce Gatwick's environmental footprint. This strategy has already delivered strong results and Gatwick has become the first London airport to hold Airport Carbon Accreditation at "Neutral" level (level 3+) and the first airport to hold Carbon Trust's Zero Waste to Landfill standard. We will continue to engage with stakeholders on issues such as noise and air quality management.
38. We have not yet completed a full assessment of environmental impacts of the standby runway proposal. If a DCO application for the standby runway scheme is brought forward then, as part of this, we would prepare a full Environmental Impact Assessment (EIA).

CARBON

39. Our Decade of Change goals for carbon are:
 - to reduce our carbon emissions by 50% against a 1990 baseline by 2020.
 - to source 25% of our energy from renewable sources.
40. Despite the growth in passenger numbers at the airport, emissions are already 42% lower than our 1990 baseline as a result of fuel saving initiatives and the purchase of 100% renewable electricity since 2013/14.

AIR QUALITY

41. Our Decade of Change goal for air quality is to reduce air quality impacts using new technology, processes and systems. All applicable air quality objectives for Nitrogen Dioxide (NO₂) continue to be met both on and off airport and current trends in concentrations show continuing improvements. Concentrations of fine particles and other pollutants also continue to be well below nationally set objectives.

NOISE

42. Our Decade of Change goal for noise is to limit, and where possible reduce the impact of operational noise and;
 - implement Gatwick's European Noise Directive (END) Noise Action Plan
 - maintain Gatwick's position as 'best practice' for noise management
 - work with airlines and partners to reduce noise impacts on Gatwick's campus
43. Gatwick's noise footprint reduced sharply from the late 1980s to the early 2000s. This resulted from the introduction of significantly quieter aircraft. Since then the overall trend has been for a gradual reduction in contour area despite an increase in annual aircraft movements, although both have fluctuated over this period.
44. We have explored this trend further by commissioning air noise contours for 2022. The 2022 noise footprint, in terms of population within the contours, is expected to be smaller than in 2017. Again this overall decrease results from the shift to quieter aircraft off-setting the increase in movements.

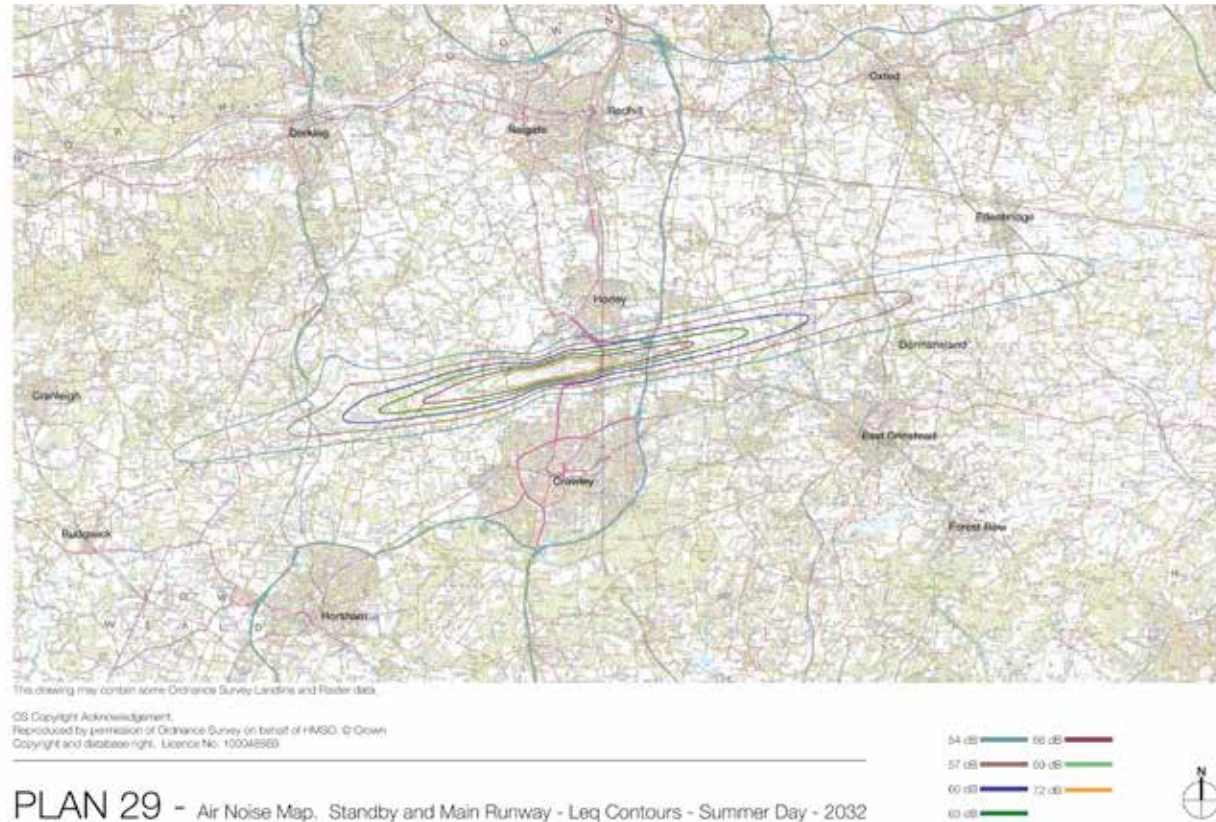
45. Noise levels with the existing main runway (growth scenario 1) are expected to reduce by 2028 and the downward trend generally continues through to 2032. This reduction results from the introduction of quieter 'new generation' aircraft which will replace existing aircraft types over this period.
46. The number of people affected by day-time noise in 2028 and 2032, with the standby runway scheme in operation (growth scenario 2), should be broadly comparable to today. This means that, while there will be more flights, this will be balanced by the fact that aircraft will be quieter, resulting in little overall change in the number of people living within each noise contour. There is a more apparent reduction in night-time noise as there is assumed to be no traffic growth in the night quota period and therefore the positive impact of quieter aircraft types is more pronounced.
47. If it is decided to progress this use of the standby runway, we would expect to start the process of preparing a DCO consultation during 2019. As part of this DCO process we will be required to demonstrate that we have fully investigated all air noise impacts of the scheme and ensured that these are adequately mitigated.

TRANSPORT

48. Our Decade of Change goals for ground transport are:
 - to achieve 40% public transport mode share for air passengers and staff by the time the airport reaches 40 million passengers per annum.
 - identify feasible measures to achieve a stretch target of 45% public transport mode share once the 40% target at 40mppa has been achieved.
49. Our strategies for promoting the use of public transport are captured in our ASAS. This shows that Gatwick's current public transport mode share for passengers is 44%, and we are very close to meeting our Decade of Change stretch target.

ENERGY

50. Our Decade of Change goal for energy is to achieve a 20% reduction in energy against a 1990 baseline by 2020. Through our energy efficiency improvements, total energy use per passenger has fallen by 40% since 2010. Through our energy efficiency strategies, we expect this trend of falling electricity and gas consumption per passenger to continue.



WASTE

51. Our Decade of Change goal for waste is to generate no untreated waste to landfill and achieve a 70% waste recycling rate by 2020. Our recycling rates have increased significantly since 2015 and in 2017 had reached 58%.

WATER

52. Through our initiatives such as enhanced leak detection and improved metering, our 2017 total water consumption was 25% lower than 2010 levels. Water consumption per passenger was around 16 litres compared with 31 litres in 2010. Through our water reduction strategies we expect to see consumption per passenger continue to fall over the coming years.

BIODIVERSITY

53. Our strategies for managing our green spaces have helped us achieve accreditation of the Wildlife Trusts' Biodiversity Benchmark for the last four years. Looking ahead our strategies will be enhanced by the development of a new, five-year biodiversity action plan, on which work has begun.

For more information about this section please view Chapters 4, 5 and 6 of the draft master plan.

ECONOMIC AND EMPLOYMENT STRATEGIES

54. Each year the UK aviation sector carries over 250m passengers and 2.5m tonnes of cargo. As the second busiest airport in the UK, Gatwick contributes a significant portion of this traffic and in doing so contributes substantial value to the UK economy.
55. Our economic assessment team has calculated that Gatwick contributes £4.1bn to UK GDP. Gatwick makes a significant contribution to the local economy, nearly 24,000 people work at the airport and airport-based businesses purchase goods and services from a variety of local suppliers. Gatwick Airport Limited alone spent £133m with local businesses in 2017.

EXISTING MAIN RUNWAY

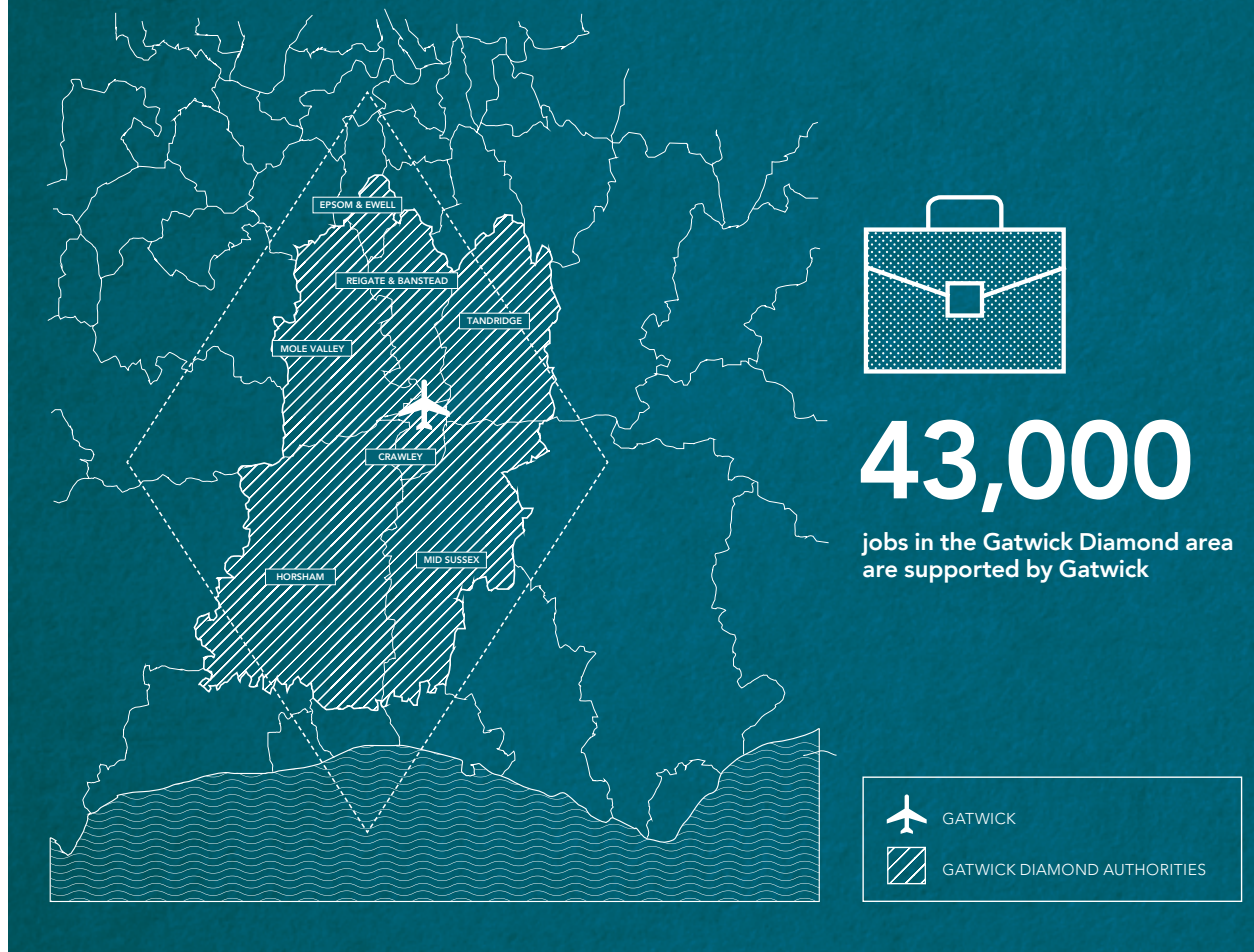
56. We have examined the current and future (2028) economic contribution made by Gatwick to the UK and, in particular, the Gatwick Diamond area (the areas directly impacted by and supporting Gatwick). We calculate Gatwick's net economic benefit to the Diamond in 2017 was £1.44bn with a further welfare net benefit of £30m for 2028. We calculate that these will increase to £1.71bn and £44m respectively.

EXISTING STANDBY RUNWAY

57. We have also carried out some preliminary analysis of the economic benefits of Gatwick with both the existing standby runway and main runway in operation in 2028, using the same methodology as that set out above.
58. This indicates a total employment of 91,000, with both the standby runway and main runway in operation, compared with 79,000 with the main runway only. Similarly, total benefit (Gross Value Added or GVA) is estimated to be £5.79bn compared with £5.06bn.
59. Net economic benefits in the area are estimated to be £1.9bn compared with £1.7bn, and wider welfare benefits are estimated to be £60m compared with £44m.

For more information about this section please view Chapters 4, 5, 7 and 8 of the draft master plan.

FIGURE 5.15: THE GATWICK DIAMOND LOCAL AUTHORITIES



CONSULTATION PROCESS

60. We value strong and constructive relationships with our neighbours in the local community and across the region, built on openness and trust. We therefore aim to keep these communities informed about what we are doing and listen to their concerns and ideas for improvements.
61. The publication of this draft master plan marks the start of a public consultation period during which we will be engaging with local communities and stakeholders to discuss the draft master plan and, in particular, seek feedback on its contents. The consultation will run from 18 October 2018 to 10 January 2019.
62. As part of the consultation process we will be holding a number of public exhibitions around the local area where Gatwick staff will be on-hand to provide more information on the content of our draft master plan and on Gatwick in general. The dates and locations of these exhibitions are:
 - Saturday 3 November – 15:30-19:30
The Barn, Causeway, Horsham, RH12 1HE
 - Thursday 8 November – 15:30-19:30
Centrale Shopping Centre, Croydon, CR0 1TY
 - Saturday 10 November – 11:00-17:00
Royal Victoria Place Shopping Centre, Tunbridge Wells, TN1 2SS
 - Monday 12 November – 15:30-19:30
Churchill Square Shopping Centre, Western Road, Brighton, BN1 2RG
 - Saturday 17 November – 11:00-17:00
County Mall Shopping Centre, Crawley, RH10 1FG
63. In addition we have set up a dedicated consultation website gatwickairport.com/masterplan2018 where we provide more information on these exhibitions and access to the full document.
64. In order to help us collect feedback on this draft master plan we invite you to respond to the questions on the next page using one of three formal response channels:
 - by completing a response form on line at gatwickairport.com/masterplan2018
 - by sending a response form to our freepost address:
FREEPOST GAL DRAFT MASTER PLAN CONSULTATION
 - or by sending your response by email to:
gatwickdraftmasterplan@ipsos-mori.com

65. Please note that 10 January 2019 at 5pm is the deadline for responses. Please only use the channels described here when responding to this consultation. Gatwick Airport Limited cannot accept responsibility for ensuring that responses sent to any other address are included in the consultation and responded to. We will acknowledge receipt of email and online submissions but we are not able to acknowledge postal submissions.

66. For more information about Gatwick's draft master plan, or if you would like a copy of this document in large print or another language, please visit the website gatwickairport.com/masterplan2018 or contact us:
 - by email: gatwickdraftmasterplan@ipsos-mori.com
 - by telephone on: 0808 168 7925
67. Once the consultation is complete we will consider and review all responses. We will publish a Report of Consultation in early 2019 and the Final Master Plan thereafter.



QUESTIONS

Please see the following questions that accompany our draft-master plan consultation. You can respond to these questions online through our website, in person at one of the exhibitions or through the post (details on the previous page).

As part of the Gatwick Airport draft master plan, we are proposing to grow Gatwick by making best use of the existing runways in line with Government Policy.

The benefits of growing Gatwick would include more choice of destinations for passengers, as well as additional employment opportunities and benefits to the wider economy. We are proposing to make Gatwick a more efficient airport, while at the same time reducing or mitigating our impact on the environment.

QUESTION 1

Given the above, to what extent, if at all, do you support or oppose the principle of growing Gatwick by making best use of the existing runways in line with Government policy? Before answering, you will find it useful to read Chapters 4 and 5 in the full version of the draft master plan.

Strongly support / tend to support / neither support nor oppose / tend to oppose / strongly oppose / don't know

QUESTION 2

Please explain why you hold this view.

QUESTION 3

Given the draft master plan looks out beyond 2030, to what extent, if at all, do you agree or disagree that land that has been safeguarded since 2006 should continue to be safeguarded for the future construction of an additional main runway? Before answering, you will find it useful to read Section 5.4 in the full version of the draft master plan.

Strongly agree / tend to agree / neither agree nor disagree / tend to disagree / strongly disagree / don't know

QUESTION 4

Please explain why you hold this view.

QUESTION 5

What more, if anything, do you believe should be done to maximise the employment and economic benefits resulting from Gatwick's continued growth? Before answering, you will find it useful to read Section 5.6 and Chapter 7 in the full version of the draft master plan.

QUESTION 6

What more, if anything, do you think should be done to minimise the noise impacts of Gatwick's continued growth? Before answering, you will find it useful to read Sections 4.5, 5.5, 6.4 and 6.5 in the full version of the draft master plan.

QUESTION 7

What more, if anything, do you think should be done to minimise the other environmental impacts of Gatwick's continued growth? Before answering, you will find it useful to read Sections 4.5, 5.5 and Chapter 6 in the full version of the draft master plan.

QUESTION 8

Do you believe our approach to community engagement, as described in the draft master plan, should be improved, and if so, how? Before answering, you will find it useful to read Chapter 8 in the full version of the draft master plan.

QUESTION 9

If you make use of Gatwick, what areas of the passenger experience would you like to see improved?

QUESTION 10

Are there any aspects of our Surface Access Strategy that you believe should be improved and, if so, what are they? Before answering, you will find it useful to read Section 4.4 in the full version of the draft master plan.

QUESTION 11

Do you have any other comments to make about the Gatwick Airport draft master plan?

