

Delivering service that matters for airport customers

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Growing airports need to adapt fast to customers' needs

- 9 years of **competition** in strong independent ownership
- Increase from **31 to >46 million** passengers since 2009
- **£2.1 billion of investment** in capacity, service, technology and commercial projects

Our big challenges and opportunities

- **Runway and airspace capacity** Very strong demand
- **Core service capacity** Constrained infrastructure
- **Growing sales per passenger** Online competition
- **Consumer landscape** Rapid change, increased demands, higher expectations



Efficient, effective service outcomes delivered with a friendly human touch requires rigorous focus on process, technology and people



Gatwick Airport by numbers: the most productive airport infrastructure on the planet



- The world's busiest single runway airport
- 55 declared aircraft movements per hour
- The UK's largest network: 228 destinations in 74 countries

- 46 million passengers per year
- 165,000 passengers per peak day
- 8,000 passengers per peak hour through security



Gatwick's airline base covers all sectors of the industry offering a diverse passenger mix and diverse needs

Low cost carriers

easyJet

norwegian

WESTJET

vueling

RYANAIR

W!ZZ

Full service carriers

virgin atlantic

BRITISH AIRWAYS



CATHAY PACIFIC

QATAR AIRWAYS

Emirates

TAP

TURKISH AIRLINES



CHINA AIRLINES

ICELANDAIR



中國東方航空
CHINA EASTERN

ROSSIYA

Aer Lingus

Leisure carriers

TUI

Thomas Cook

Selected airlines only



Relaxed, happy customers need a great environment, fast and predictable processes, finger tip information and a human touch

Physical journey

Investment in terminals & operations to deliver capacity, quick core processes and a quality customer environment



YOUR LONDON AIRPORT
Gatwick

Emotional journey

Trained staff curate and deliver memorable experiences to gain customer advocacy and build reputation

Digital journey

Automation, digital technologies are powerful consumer realities which need to be exploited in the interests of customers and our bottom line



How have our passengers' needs changed over time?



2011

I don't want to queue

Technology improves
passenger processes & flow

NOW

I want to feel in control

Technology provides
personalised experiences



Every day >130k empowered, informed, demanding, tech-enabled consumers come through our doors



Technology has transformed our passenger journey and service delivery



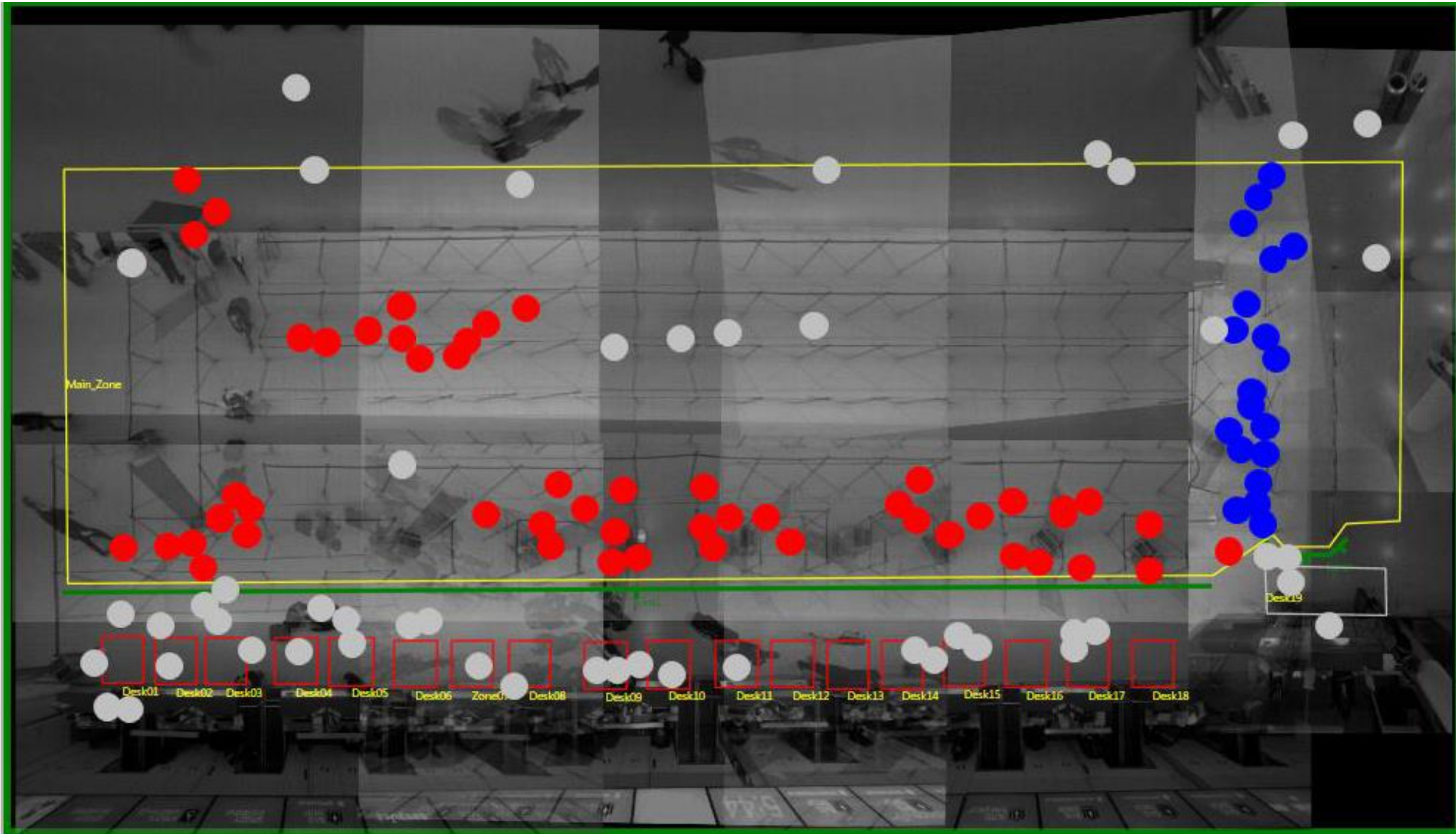
Automating check-in through to gate processes speeds up customer journey and puts passengers in control



- Trial: 20,000 passengers/355 flights
- >65 different passport nationalities
- 14 second transaction time at e-gates for boarding
- 90% rated the boarding experience at “excellent” or “good”.



Real time check-in queue data drives service improvement and improves response times



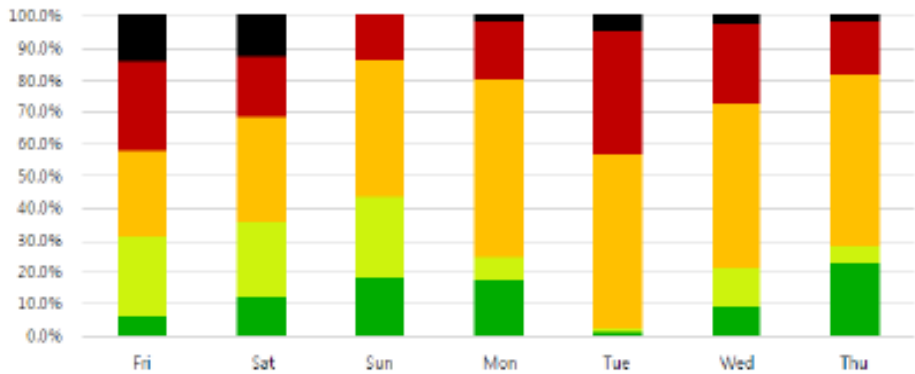
Weekly Waiting Times Statistics

Waiting Time	Target	Actual	PAX
< 5 Min	50%	13.1%	4587
< 10 Min	70%	27.2%	9533
< 20 Min	90%	72.9%	25513
< 30 Min	95%	95.0%	33243
> 30 Min		5.0%	1722
Total			34965

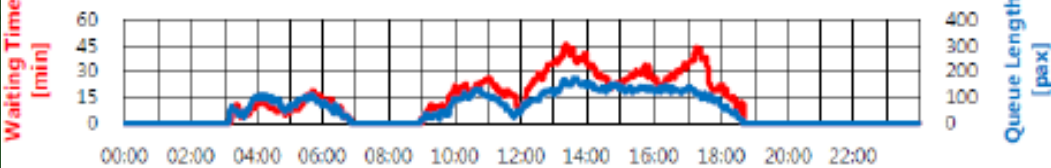


< 5 min
5 - 10 min
10 - 20 min
20 - 30 min
> 30 min

Daily Waiting Times Statistics



Friday



Passive WiFi analytics makes our infrastructure intelligent



- **Live and predictive** passenger flow management
- Improved **retail visit counts and performance** insight
- **Optimised staffing** – cost, revenue and service benefits
- Enhanced **customer behaviour/segmentation insight** based on 4 millions visitors per month
- Enhanced **strategic decision making** for category and concession placement
- **Evidence based concessionaire funded retail promotions:** >30% increase in store visits



Award winning Gatwick Community App has transformed our campus comms to deliver better service

Digital Impact Awards 2017

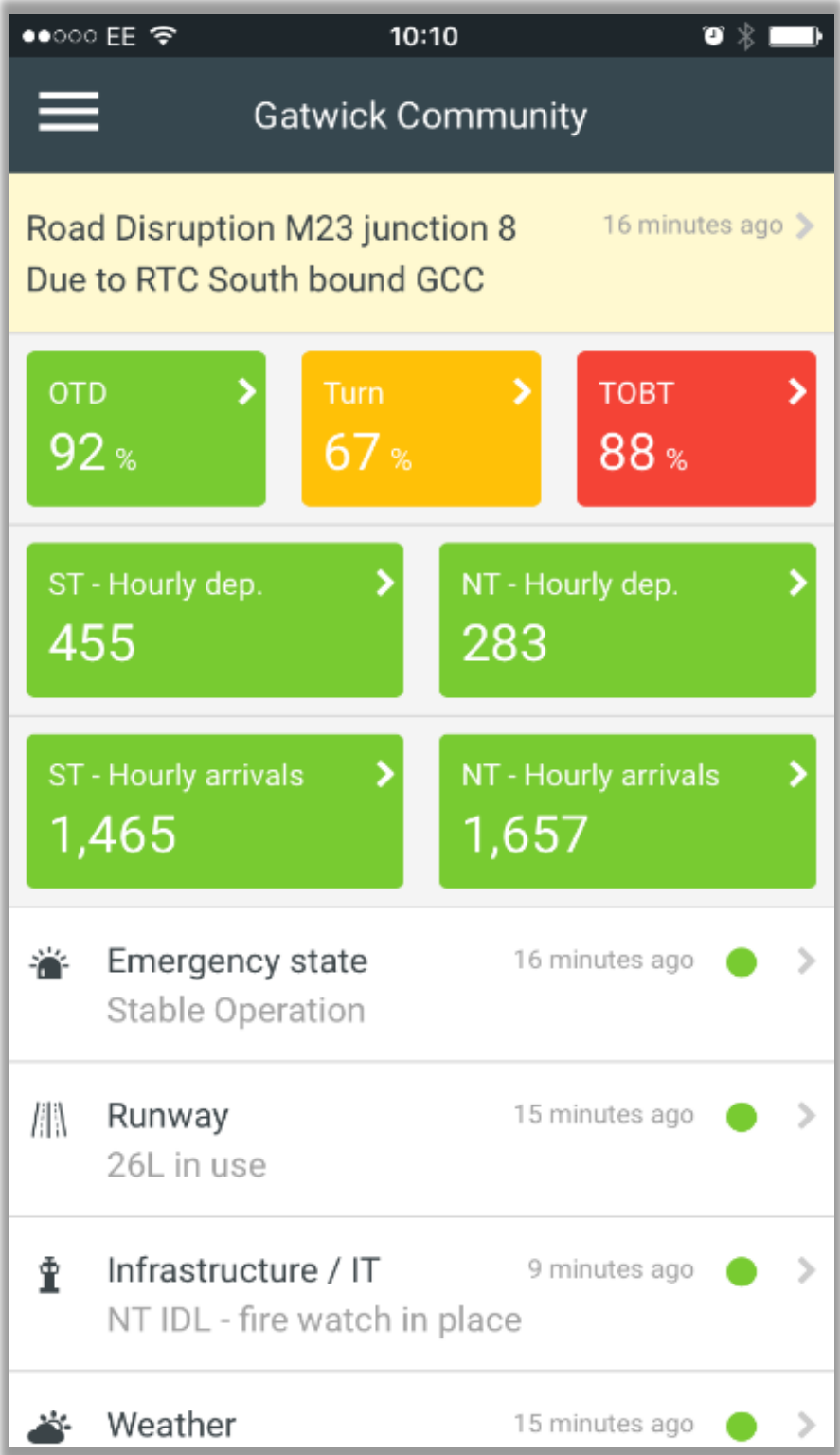
- Best corporate app
- Best use of mobile and portable devices
- Best community development
- Best use of digital from the travel, leisure and tourism sector - **HIGHLY COMMENDED**

GOLD
SILVER
BRONZE

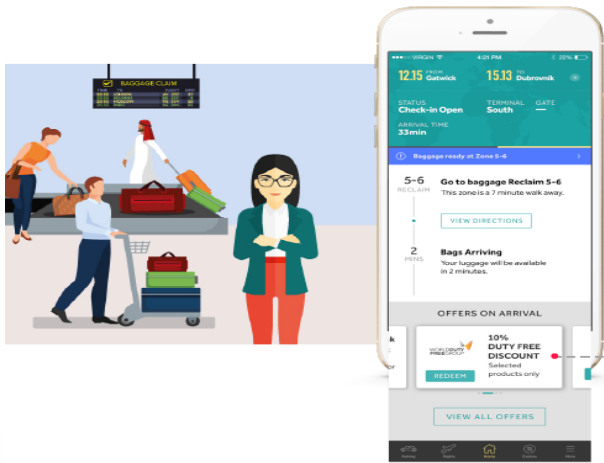
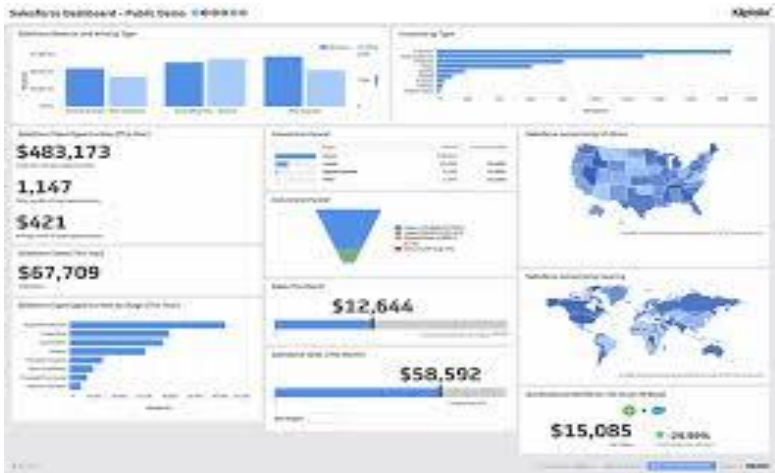
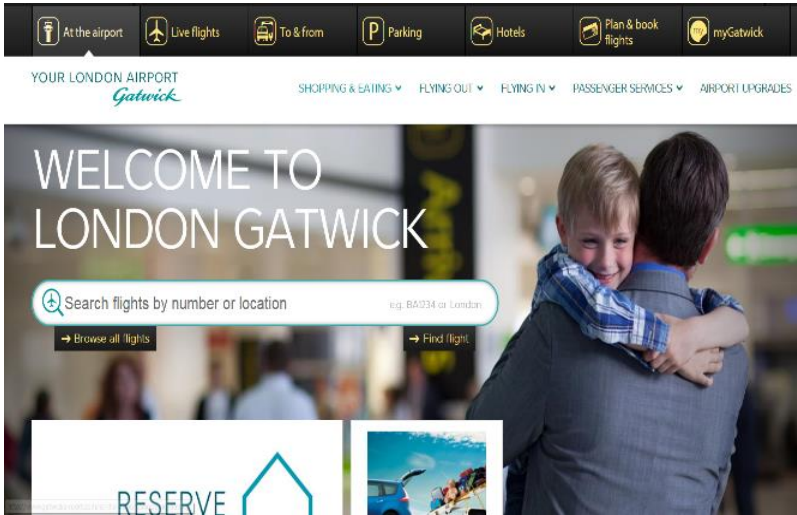


'Digital In-house Team of the Year'

"Our judges thought the app, and Gatwick's teams, were first class, praising the airport's ambition in bringing together so many disparate organisations and utilising the power of digital technology to improve every aspect of the airports operation."



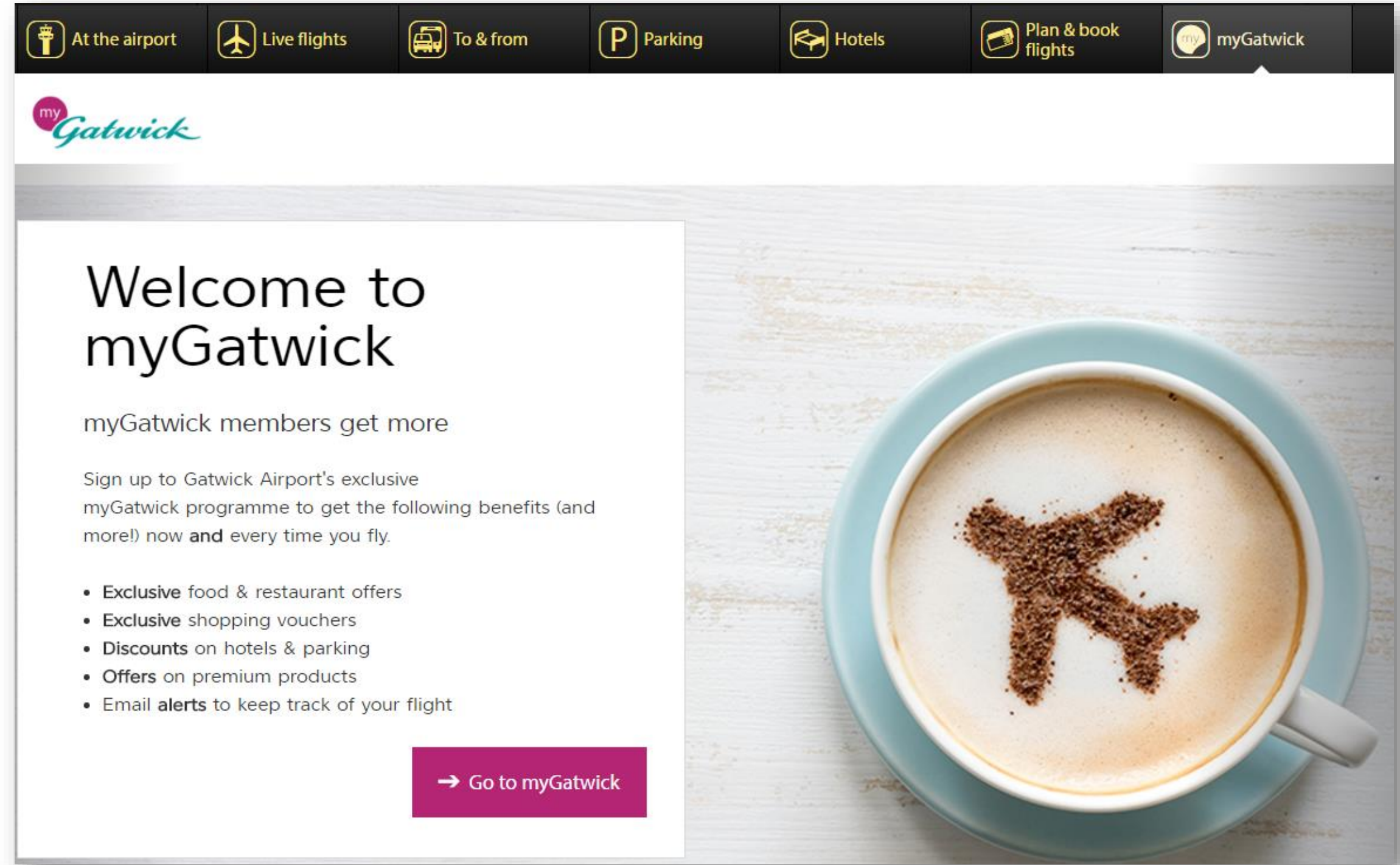
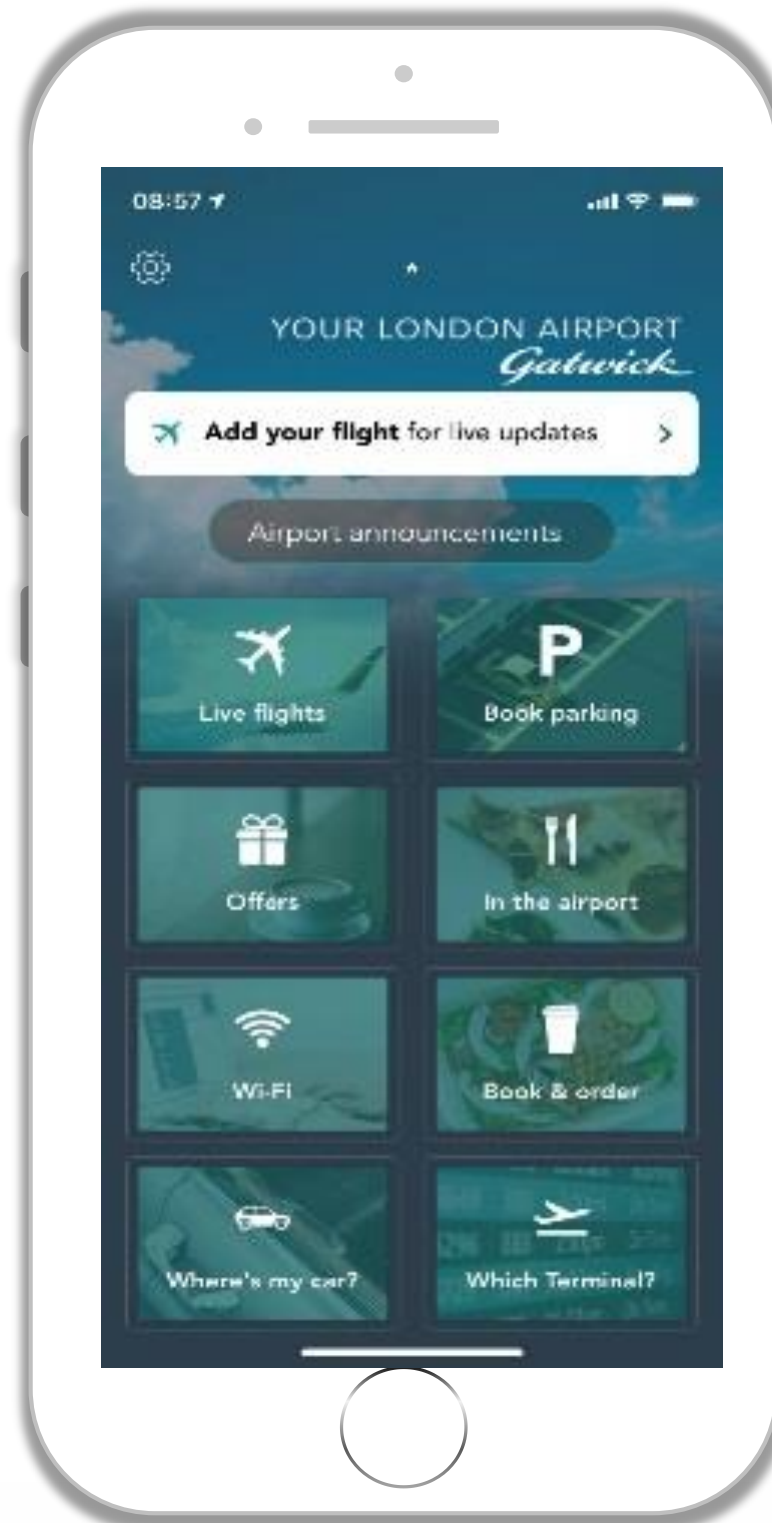
Creating a Unified Customer View allows us to recognise our passengers as customers



RELEVANT OFFERS TO EACH STAGE OF THE USERS JOURNEY



Personalising the airport experience and rewarding engagement



GatwickConnects – next generation flight connections




Gatwick
CONNECTS
Your flight connection service
Booking System

YOUR LONDON AIRPORT
Gatwick

easyJet announces 'Worldwide by easyJet'

13 Sep 2017 easyJet, Europe's leading airline, has today launched 'Worldwide by easyJet' - the first global airline connections service by a European low fares airline.



Gatwick
CONNECTS
Your flight connection service

The world's best self-connection experience

easyJet	TP	Aer Lingus	virgin atlantic	WOW
aurigny	BRITISH AIRWAYS	norwegian	Air Europa	
Thomson	Thomas Cook Airlines	WESTJET	Monarch	flybe

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Numbers of passengers that require assistance are growing faster than the average

New North Terminal Special Assistance Airside Waiting Room



First airport sensory room



Hidden disability lanyard

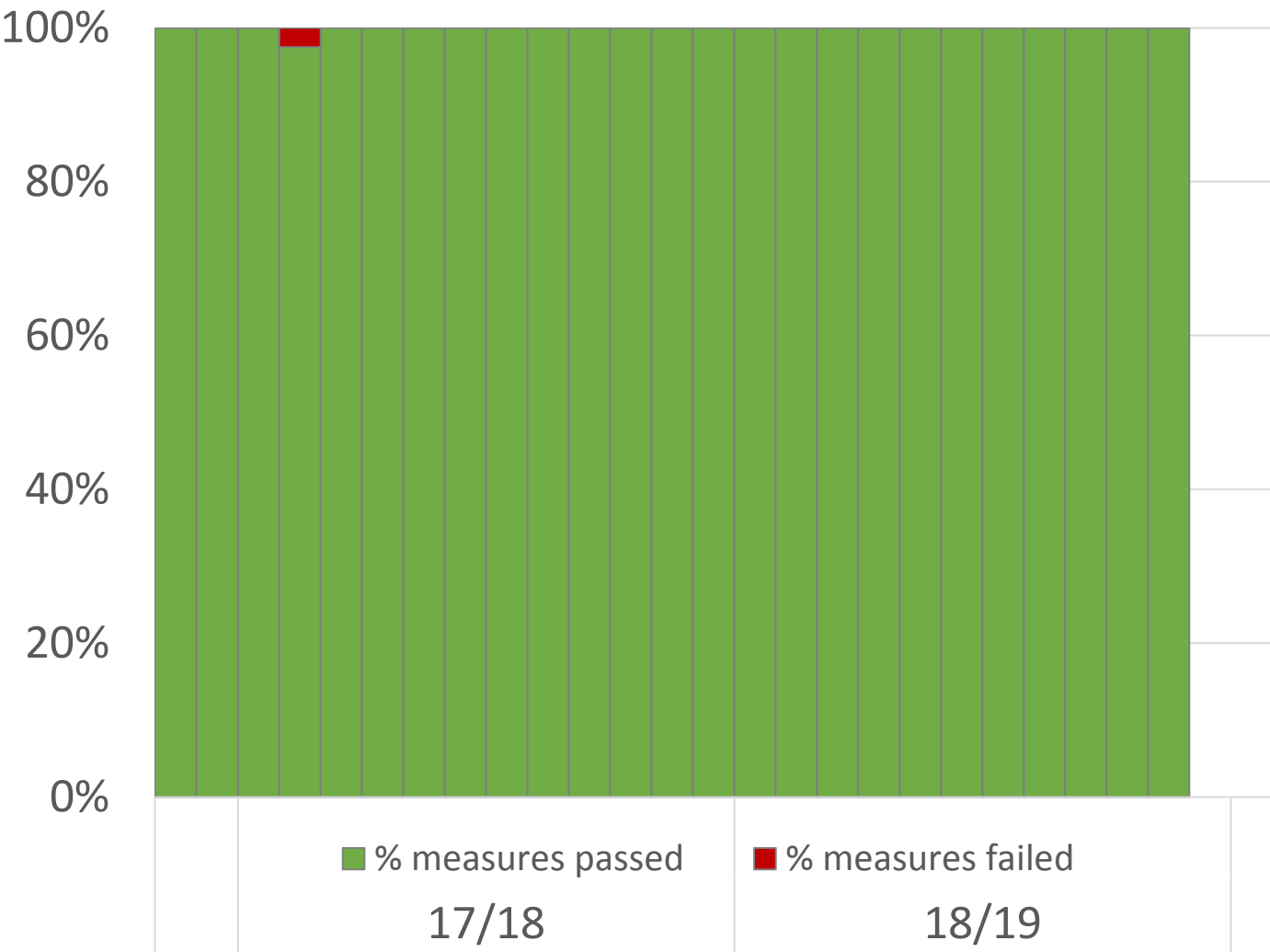


Technology is a key enabler but the personal touch completes the emotional journey

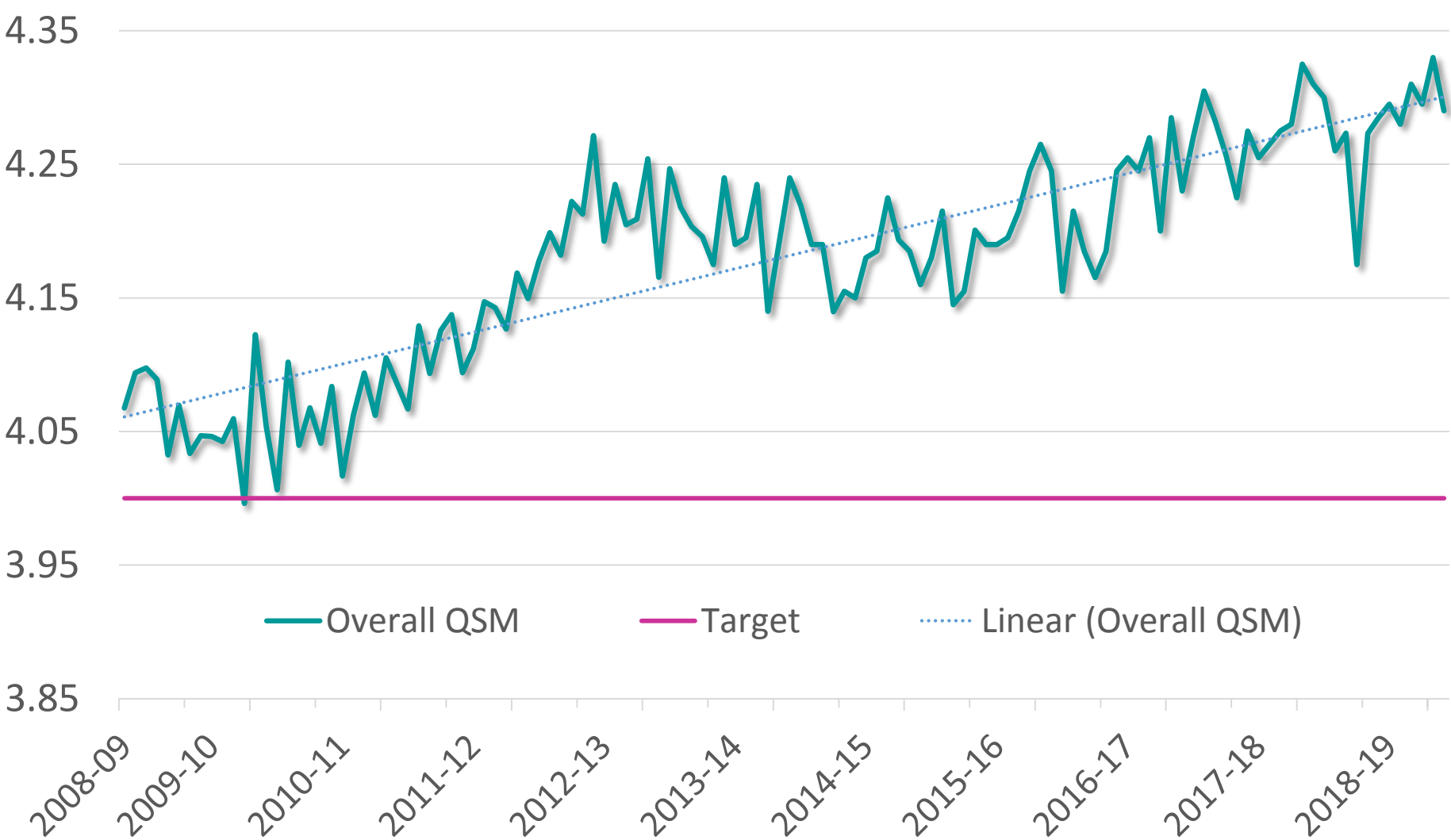


Service delivery is quantified and measure monthly, with revenue at stake

40 monthly service scores –
100% achieved for 21 months

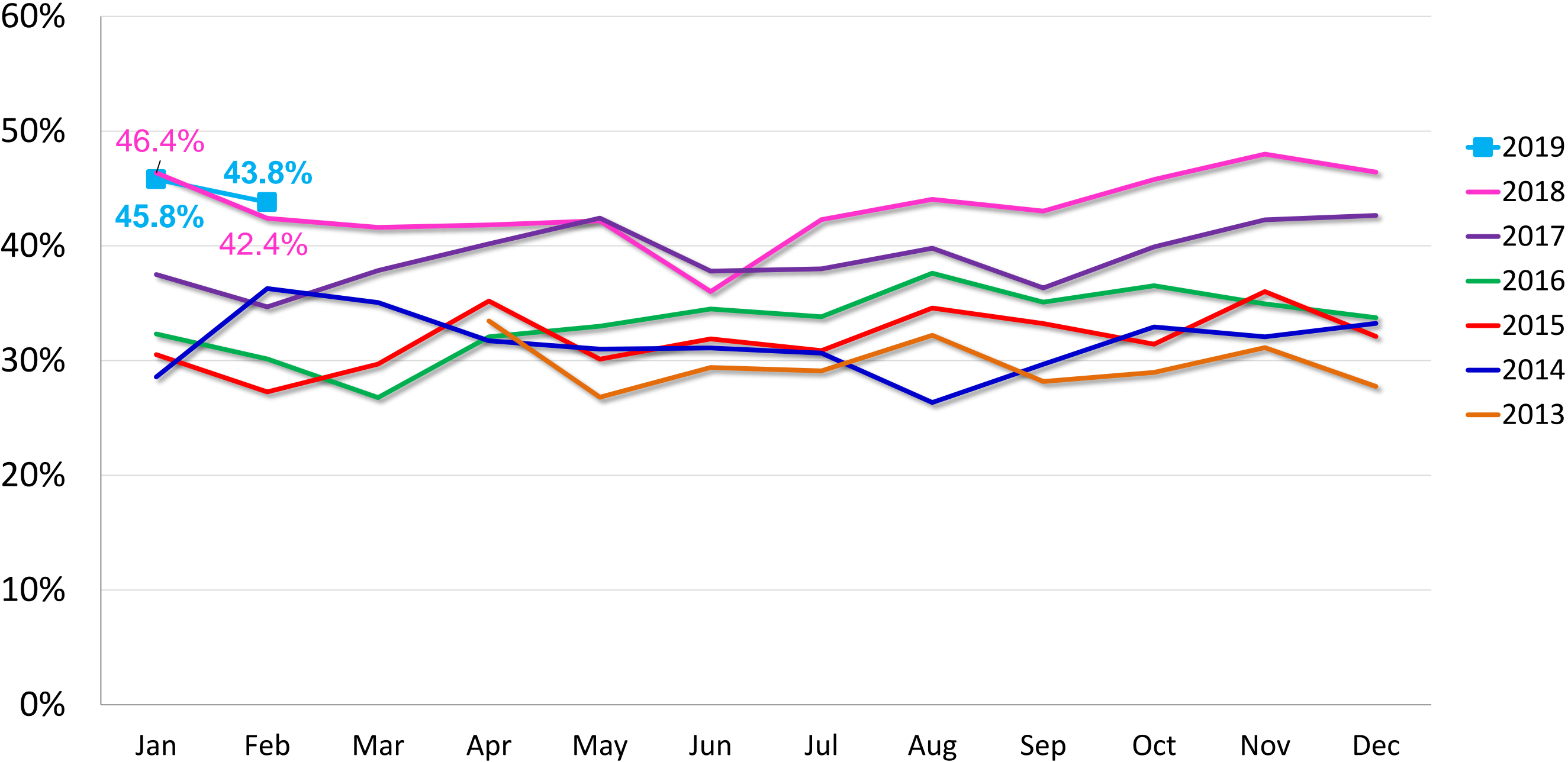


Monthly survey data shows continuous
improvement to excellent levels



Record levels of passenger satisfaction reflected in passenger advocacy

Net Promoter Score



Thank you

LTA | LONDON
TRANSPORT
AWARDS **2018**

WINNER

AIRPORT OF THE YEAR

NTA

National Technology Awards 2018

WINNER

Mobile Innovation of the Year

WINNER: Gatwick Airport

LTA | LONDON
TRANSPORT
AWARDS

2019

WINNER
EXCELLENCE IN TRANSPORT ACCESSIBILITY

LOO
OF THE YEAR
Awards



TOP 50 companies
for customer service

ROSPA

accidents don't have to happen

Gold Medal Awards

6 Gatwick Airport Ltd - Operations

