SURFACE ACCESS STRATEGY

AUGUST 2022

Heathrow

ENTER

Contents

Foreword by Tony Caccavone

How people travel to and from Heathrow is critical for the airport's operations and we are committed to improving the range of travel options as well as the quality of each individual's experience. Our vision for surface access is to transform journeys to and from Heathrow by making them faster, easier, more reliable and more sustainable. We want to improve access to Heathrow to bring it into alignment with one of our consumer outcomes: 'I am confident I can get to and from the airport'. We want to reduce congestion, cut carbon emissions, improve local air quality, raise the quality of life for our local communities, and increase our economic value to the UK.

Despite testing times in recent years, we've remained resolute in our commitment to sustainability. It's integral to our success and it remains a top priority. This was communicated in our recently published sustainability strategy – Heathrow 2.0: Connecting People and Planet – and Net Zero Plan. Our Surface Access Strategy sets out how surface access will contribute to the delivery of these plans by driving modal shift and supporting the transition to zero emission vehicles. It puts a clear plan in place so that everyone at Heathrow – the airport, our stakeholders and our partners – can work together towards a new future for travelling to, from and around Heathrow.

Our Surface Access Strategy sets out how we will increase our passenger public transport mode share, reduce our colleague single-occupancy-car mode share, reduce carbon emissions and increase our public transport catchment. Interventions will improve connections and facilities, increase awareness of travel options, and manage demand for less sustainable modes.

This Surface Access Strategy covers an exciting time (2022 to 2026) for surface access at Heathrow as we launch our new Sustainable Travel Zone, welcome the Elizabeth line to the airport, enable cycling to and from the Central Terminal Area for the first time since 2014, develop and implement a new colleague car parking strategy and improve the way we monitor colleague travel.

We will need to be creative, and to work in partnership with our transport partners and local authorities to drive improvements that achieve our collective goals. We will need critical friends to challenge us where they think we could do something better or where there are gaps and opportunities for partnership working. Transforming journeys to and from Heathrow in the coming years will not be easy, but by working together we can make the difference.

TONY CACCAVONE
Surface Access Director – Heathrow Airport Limited

INTRODUCTION

This is Heathrow's Surface Access Strategy (SAS) for 2022 to 2026, developed with input from the Heathrow Area Transport Forum (HATF) and other stakeholders.

Introduction

The way that people travel to and from Heathrow has a huge effect on the way the airport operates, on the quality of life of our neighbours, on traffic flows in surrounding roads and on the amount of carbon the airport emits. To influence passenger and colleague choices we have to widen the range of travel options and improve the quality of the travel modes that generate the best outcomes.

Covid-19 has seen the aviation industry confront the biggest crisis in its history. We've had to prioritise – to focus our resources on the issues that matter most to our stakeholders, and on the areas in which we can make the biggest difference. We're launching this strategy at a time when passenger numbers are rising, while other issues – the war in Ukraine, higher fuel costs, risk of recession, continuing travel restrictions for key markets and the potential for further variants of concern – create uncertainty. Nonetheless, sustainability and decarbonisation remain priorities for Heathrow. Our SAS points the way forward. It provides a framework within which our colleagues, partners and stakeholders can work together to transform travel to and from Heathrow – and beyond.

The SAS has been driven by a vision – that of making journeys to and from Heathrow faster, easier, more reliable and more sustainable – and by a simple passenger need. Our passengers expect six fundamental consumer outcomes. One of them is: 'I am confident I can get to and from the airport'.[1] We believe that we can give passengers and colleagues what they want while reducing congestion, cutting carbon emissions, improving local air quality, adding to the quality of life for our neighbours and increasing our economic value to the UK. Our SAS sets out how we will make surface access more sustainable, and how our plans will play a role in delivering the UK Government's ambitions of net-zero carbon.

While we consult with investors, Government, airline customers and regulators on our next steps for expansion, and as the airport recovers from the impacts of Covid-19, we are publishing our SAS to coincide with our H7 Regulatory Period, which also runs from 2022 to 2026.

This document sets out what is meant by surface access, and why it is important. It also provides an overview of surface access today, before outlining the targets we have set and the measures we have developed to form our SAS. It finishes by setting out how we will deliver the interventions, and monitor and report on our progress.

[1] Heathrow Airport H7 Revised Business Plan – Update 1

Introduction – *continued*

What is surface access?

Surface access refers to all the ways in which passengers, communities, colleagues and goods travel to and from Heathrow. This includes travelling by train, tube, coach, bus, taxi, private hire vehicle (PHV), car, motorbike, lorry, bicycle and on foot. It does not include trips by aircraft (e.g. transfer passengers).

The surface access network connects people and freight to Heathrow, supporting its role as the UK's only hub airport. Heathrow is also an integrated transport hub, bringing together road, rail and air transport for both airport, and non-airport users. Fast and frequent rail services connect Heathrow to London, with an extensive bus and coach network providing connections locally and to the rest of the country. Heathrow has direct road access from the M25 and M4 and is within easy reach of the M1, M3 and M40.

Why does surface access matter?

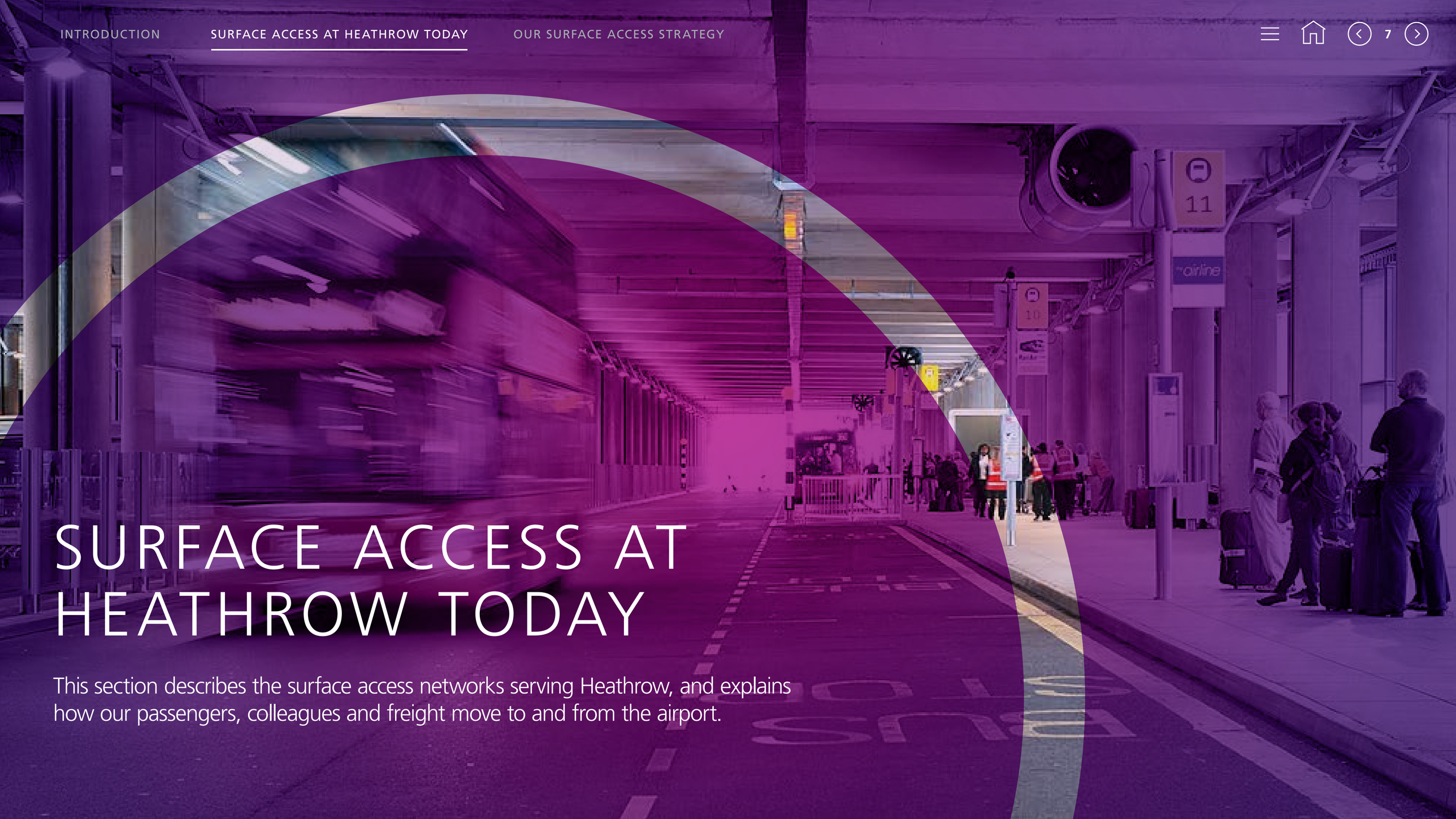
Our SAS will deliver key targets within our sustainability strategy, Heathrow 2.0: Connecting People and Planet,[2] the Carbon on the Ground aspect of our Net Zero Strategy[3] and our consumer outcome of 'I am confident I can get to and from the airport'.[4] Surface access is critical in ensuring that we can recover and grow sustainably to make a positive impact on our local community, the environment, and the economy. It plays a fundamental role in reducing congestion, improving air quality and lowering carbon emissions. Our SAS addresses this by encouraging greater use of public transport, walking and cycling, and ensuring that the remaining motor-vehicle trips are conducted more efficiently and use cleaner vehicles.

How people travel to and from Heathrow is also critical for airport operations because their journeys can create congestion on airport roads, local roads and the nearby strategic road network (SRN). We also know that local congestion is an issue of concern for our neighbouring communities. We are committed to widening the range of options for people travelling to and from Heathrow, and improving the quality of their experience. Surface access is an important factor in ensuring as many people as possible have access to jobs at more than 400 businesses based at Heathrow. Our passengers and colleagues value reliable, direct and convenient travel. We know from our research that this includes improved capacity, frequency, reliability and affordability, as well as perception of quality.

Heathrow's critical role in the UK economy is also underpinned by direct, reliable surface access. Heathrow is the UK's largest port by value for trade, handling £164 billion of goods in 2021. However, this relies on being able to move goods easily and reliably to and from the airport. Fast, frequent and reliable transport connections matter to UK businesses that depend on Heathrow as their gateway to world markets.

As we improve our surface access network, we can also introduce benefits for local communities. As Heathrow works with operators to develop new routes and public transport services, people in the local area can use them to travel locally, to the airport and to make onward connections to other destinations in London and the south-east, and elsewhere in the UK. This supports economic development and addresses our shared challenges of congestion, air quality and decarbonisation.

[2] Heathrow 2.0: Connecting People and Planet
[3] Heathrow's Net Zero Plan
[4] Heathrow Airport H7 Revised Business Plan – Update 1



SURFACE ACCESS AT HEATHROW TODAY

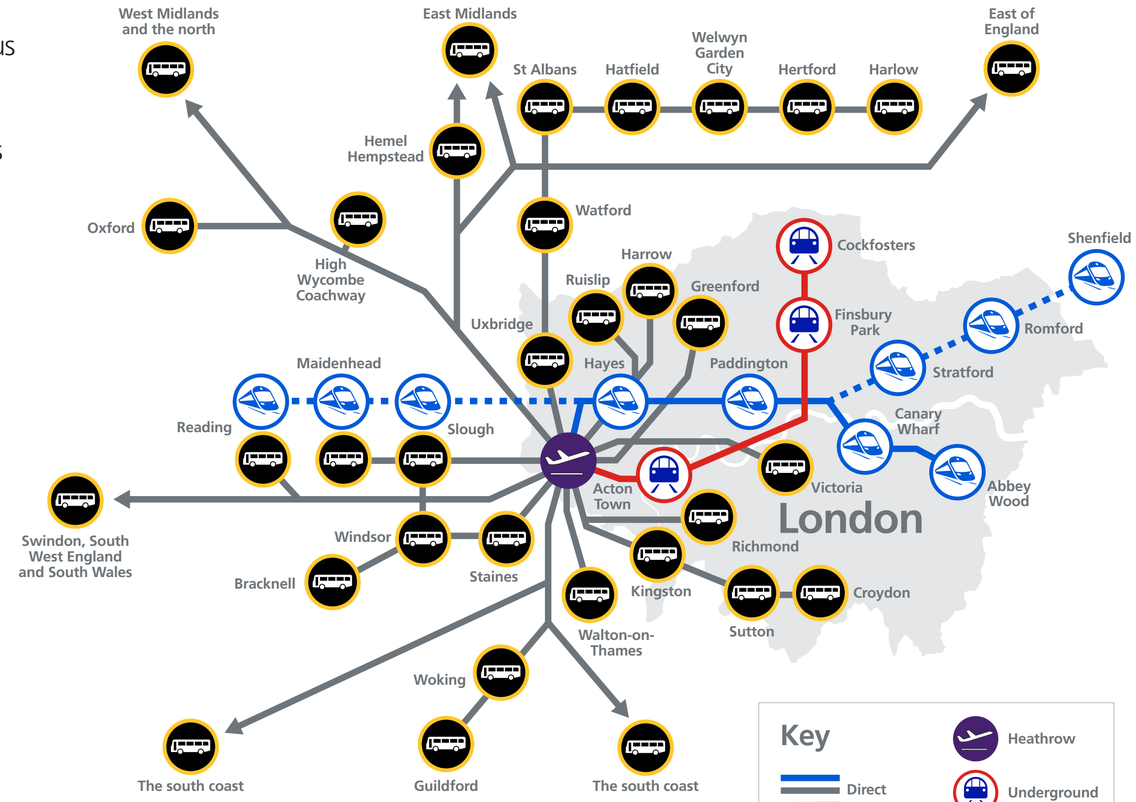
This section describes the surface access networks serving Heathrow, and explains how our passengers, colleagues and freight move to and from the airport.

Surface access at Heathrow today

Surface access networks

Fast and frequent rail services connect Heathrow to London, and an extensive bus and coach network provides connections locally and to the rest of the country (see Figure 1). Heathrow has direct road access from the M25 and M4 and is within easy reach of the M1, M3 and M40. Further details on our surface access networks can be found in Chapter 6 of our 2019 Heathrow Airport Travel Report.[5]

Figure 1: ***Heathrow direct public transport connections***



Source: Heathrow

Since we published our 2019 Heathrow Airport Travel Report, Covid-19 has had a material impact on the way people travel. In turn, this has had a devastating impact on our finances so we had to make difficult decisions to protect jobs, including removing support for some surface access services. As the airport recovers, these services will be built back gradually through the measures outlined in this SAS.

Heathrow subsidies generally cover only a small proportion of bus and coach operating costs. During Covid-19, public transport operators also experienced significant reduction in demand for their services. Many took the difficult decision to withdraw or reduce services, including a number of routes which operate to and from Heathrow. Changes to surface access since 2019 include:

- Reduced service on some bus and coach routes.
- Withdrawal of four bus services by operators.
- Removal of the Free Travel Zone (a zone around the airport where public transport was free).
- Removal of the Heathrow Travelcard discounts for Team Heathrow colleagues.

A 75% discount remains on Heathrow Express for Team Heathrow colleagues (100% discount for HAL colleagues) and several Team Heathrow colleague discounts are now available directly from service providers. More information about how we are growing back the surface access network can be found in the "Sustainable Travel Zone section on pages 24-25.

[5] Heathrow 2019 Travel Report

Surface access at Heathrow today – *continued*

How passengers, colleagues and freight move to and from the airport today

This section describes how passengers, colleagues and freight move to and from the airport, and the impact Covid-19 has had on these journeys. To achieve our surface access aspirations, we must increase our passenger public transport mode share, and reduce the mode share for private vehicle trips. For colleagues, we are focused on reducing our single-occupancy-vehicle mode share for private vehicle trips. For colleagues, we are focussed on reducing our single occupancy vehicle mode share for commuting by increasing public transport, active travel (walking and cycling) and car sharing. For freight, the focus is on minimising negative impacts and increasing the efficiency of movements.

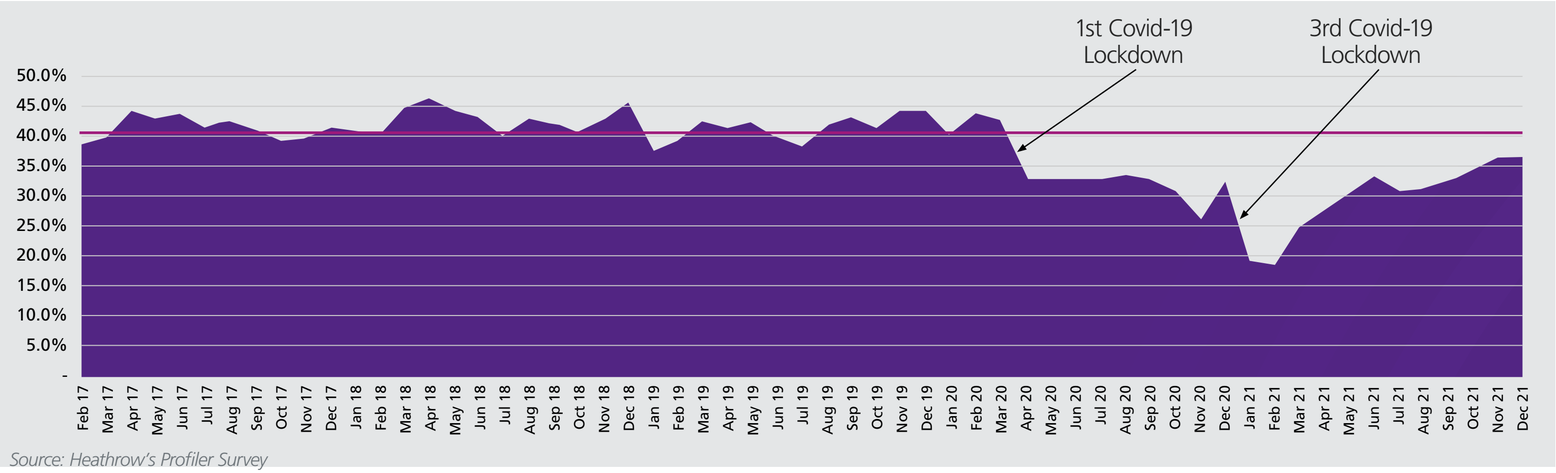
Passengers

The proportion of passengers using public transport to access the airport is a key metric for Heathrow. We are aiming to reduce our environmental impact on local communities by reducing the amount of congestion and emissions generated from private vehicle trips to and from Heathrow. Encouraging passengers to use public transport is key to this aim.

Heathrow's monthly Profiler Survey[6] of departing passengers shows that, pre-pandemic, passenger public transport mode share was at a relatively stable 40% (see Figure 2). Our 2019 Heathrow Airport Travel Report provides more details on passenger mode shares pre-Covid.

Covid-19 had a significant impact on both the demand for air travel, and the way passengers travel to and from the airport. Fewer passengers used public transport. In early 2021, our passenger public-transport mode share dropped as low as 18%. It gradually recovered to just under 37% by the end of 2021. Mode share is also impacted by the mix of business and leisure passengers, and by the terminals from which they fly. All terminals were back in operation in June 2022, and we will continue to monitor mode share.

Figure 2: ***Monthly Passenger Public Transport Mode Share 2017-2021 (%)***



Source: Heathrow's Profiler Survey

[6] Heathrow, Monthly Profiler Survey

Surface access at Heathrow today – *continued*

The impact of Covid-19 on the demand for air travel and how people will use surface access to travel to and from the airport in the coming years remain unpredictable. We expect personal safety and cleanliness to remain a higher priority for passengers.[7] Our Profiler Survey data suggests there is less trust in public transport because of concerns over Covid-19, but trust seems to be returning with time.

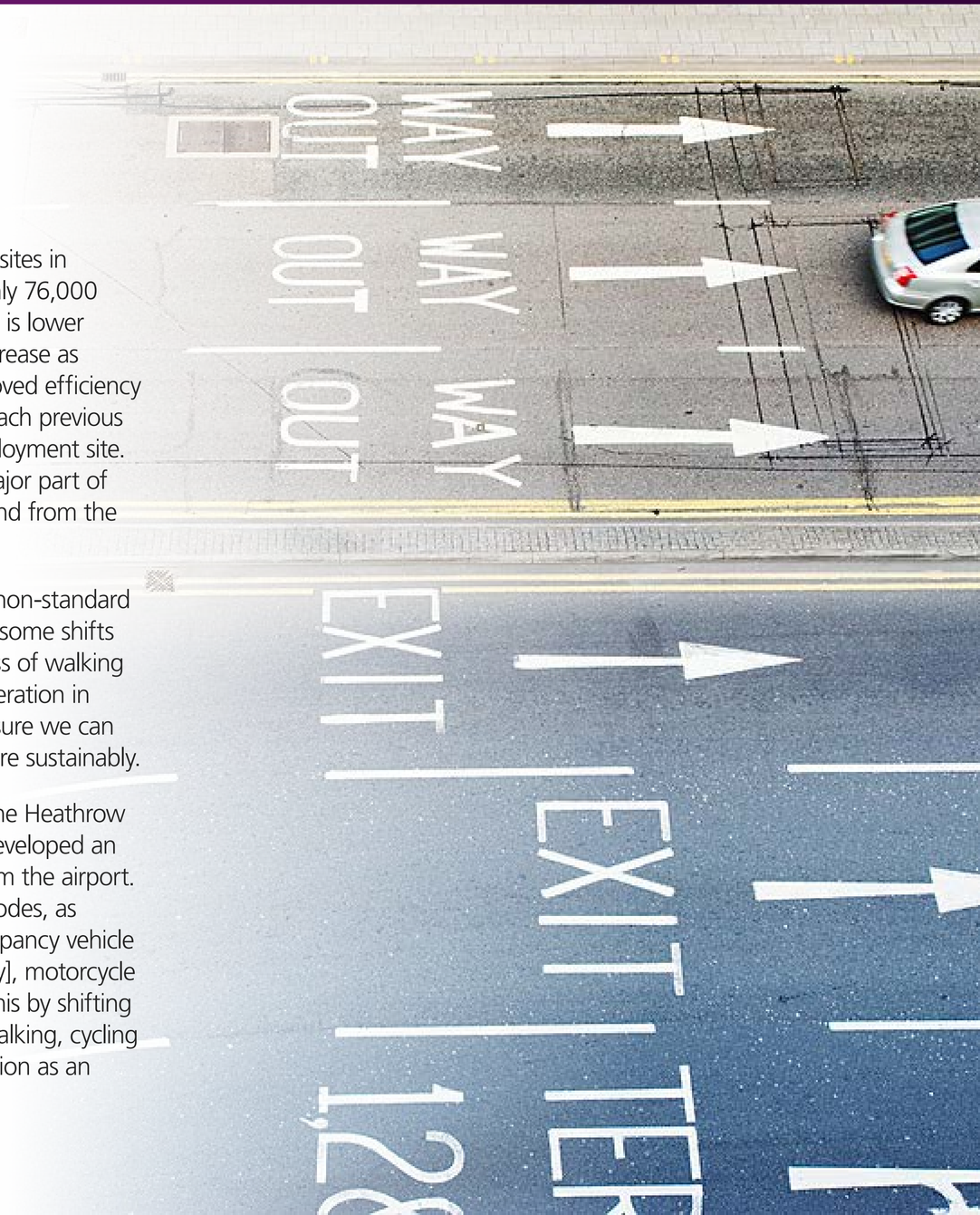
Our research with Transport Focus has identified the dominant factors affecting air passengers' choice of travel mode to and from Heathrow. The biggest factor, at 55%, is ease of travel with luggage, followed by quick journey time (47%), value for money (44%) and flexibility (41%). Our insights show that consumers value speed, ease and trust[8] when choosing the mode for their airport journey, and we believe these will continue to be important. As passenger demand grows back, we will have choices to make about where we invest to influence passengers' airport-travel behaviour.

Colleagues

Heathrow is one of the largest single employment sites in the UK. In 2019 it was estimated there were roughly 76,000 colleagues from over 400 companies. This number is lower today as a result of Covid-19 but is expected to increase as passenger demand returns. Automation and improved efficiency will likely mean colleague numbers do not quite reach previous levels, but the airport will remain a significant employment site. As a result, travel by our colleagues makes up a major part of the total number of surface access trips made to and from the airport on any given day.

A significant proportion of these colleagues work non-standard shift patterns outside conventional hours,[9] and for some shifts the availability of public transport and attractiveness of walking and cycling is lower. This has been a strong consideration in developing the initiatives that form our SAS, to ensure we can enable as many colleagues as possible to travel more sustainably.

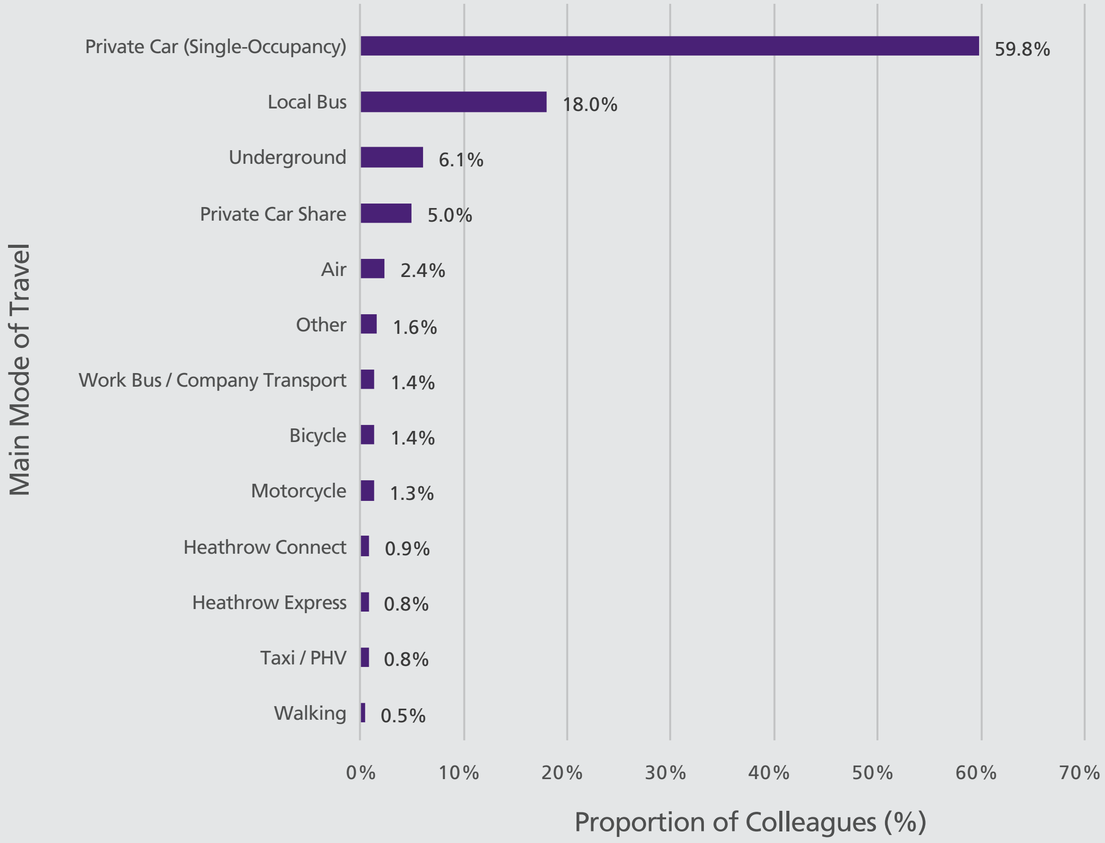
Data on colleague travel was collected as part of the Heathrow Employment Survey in 2017. Using this data, we developed an understanding of how colleagues travel to and from the airport. The majority of colleagues use private transport modes, as shown in Figure 3. Our mode share for single occupancy vehicle trips is 62% (including private car [single occupancy], motorcycle and taxi/PHV). A key aim of our SAS is to reduce this by shifting colleague commuting mode to public transport, walking, cycling or car share whilst maintaining Heathrow's reputation as an attractive place to work.



[7] Join the Dots, Horizon Surface Access Post Covid-19 Recovery report, August 2020
[8] Ipsos Mori, Heathrow Surface Access Insights Synthesis, April 2019
[9] Heathrow 2019 Travel Report

Surface access at Heathrow today – *continued*

Figure 3: ***Team Heathrow Colleague Commute Mode Share***



Source: Team Heathrow Employment Survey, 2017

We acknowledge that this dataset is from five years ago, which is not ideal for planning and reporting purposes. A small-scale colleague travel survey was undertaken in 2021 but it was not possible to follow the same robust methodology for mode shares, including weighting by employee type and other factors.

Therefore the 2021 mode share data is not reliable, but it did provide other useful insights which have helped develop this SAS. The full survey undertaken in 2017 is due to be repeated in 2022/2023 which will provide updated colleague mode share data. Following this we plan to move to a robust annual colleague travel survey.

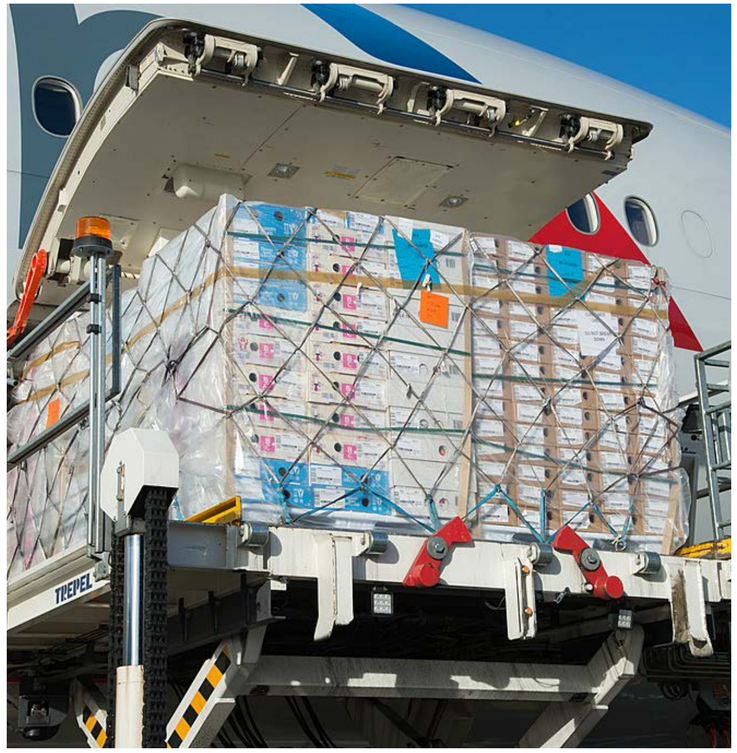
Surface access at Heathrow today – *continued*

Freight

Heathrow is the UK's largest port by value for trade, handling £164 billion in goods in 2021.[10] This is more than the top three seaports combined. Heathrow cargo moves to and from the airport by road.

Freight vehicle activity takes place 24 hours a day, 365 days a year, with vehicles approaching the airport from all directions. In 2019, freight vehicle trips accounted for about 6% of all Heathrow-related vehicle trips, but were estimated to generate around 36% of vehicle-related emissions. That's why understanding how freight moves in and out of the airport is vital to ensure we can manage our impacts on local air quality and carbon emissions. We know that freight vehicles wait in local roads, and will continue to work with stakeholders, including our local communities, to reduce this.

Cargo-related freight vehicle trips make up around three quarters of all airport-related freight vehicle trips. The rest relate to airline servicing (in-flight catering), airport servicing (maintenance and development), retail and waste. We need to ensure that our cargo operation – and demand for cargo at Heathrow – grow sustainably, with strong cargo community engagement at their heart.



Accessibility

Heathrow is currently fully accessible by train, London Underground and all scheduled bus and coach services (meeting the conditions set out in the Transport Act, 2000). All stations on the Elizabeth line are now step-free from street to platform following works in preparation for the launch of the service. Blue badge holders are exempt from our Terminal Drop Off Charge (TDOC) to ensure all passengers are able to travel to the airport easily and safely. Team Heathrow colleagues also recognise the sunflower lanyard for people with hidden disabilities.

We will continue to work with the Heathrow Access Advisory Group (HAAG) to improve accessibility and ensure travel to and from Heathrow is as inclusive as possible. This will be considered in developing all of our initiatives with improvements incorporated, where required.

[10] HMRC UKTradeInfo

OUR SURFACE ACCESS STRATEGY

This section sets out the targets, aspirations and proposals that form our SAS for the next five years. Proposals are presented in four sections: increasing passenger public transport mode share, reducing colleague single-occupancy-vehicle mode share, supporting uptake of ZEVs, and reducing the impact of surface access on local communities.

Targets

In line with the Government's Aviation Policy Framework (March 2013)[11] we have an Area Transport Forum. The Policy Framework says that one of the primary roles of the Area Transport Forum is to:

"set out targets for increasing the proportion of journeys made to the airport by public transport for both airport workers and passengers".[12]

The Heathrow Area Transport Forum (HATF) robustly challenges Heathrow on its performance against defined surface access targets and requirement to do the right thing for passengers, colleagues, and local communities. The HATF priorities for surface access, which focus on achieving sustainable outcomes that benefit the sub-region, have also been a key focus when setting surface access targets.

The purpose of our surface access targets is to focus the delivery of our SAS, prioritise investments that maximise benefits, and enable the monitoring of progress towards achieving our surface access outcomes.

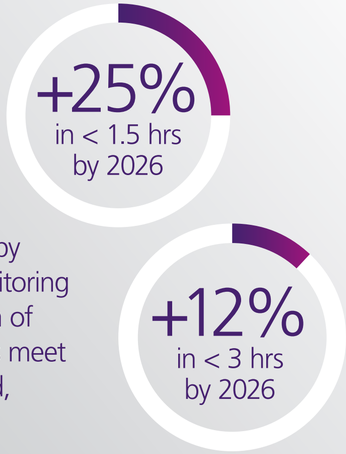
As well as working with HATF, we have listened to the airline community and other stakeholders. The outcome of these discussions is a set of targets for 2026 that continue to progress us towards our longer-term sustainability and carbon goals. Our four targets are:

1. Achieve a **passenger public transport mode share** of 45% by 2026 (compared to a 2019 baseline of 40%).

2. Achieve a **colleague single-occupancy-car mode share** of 57% by 2026 (compared to a 2017 baseline of 62%).

3. Reduce **surface access carbon emissions** by 49% by 2030 (compared to a 2021 baseline of 747,879tCO₂) as set out in Heathrow 2.0[13] and our Net Zero Plan[14].

4. Expand the catchment area to bring 25% more people within a 1.5-hour **public transport journey time** of Heathrow, and to increase the 3-hour catchment population by 12% – both by 2026. For monitoring purposes, we'll set a maximum of one change to ensure journeys meet passenger requirements (speed, ease and trust).



[11] Aviation Policy Framework
[12] Aviation Policy Framework, page 70 to 71, paragraph 4.20
[13] Heathrow 2.0: Connecting People and Planet
[14] Heathrow's Net Zero Plan

Key surface access strategy aspirations

This SAS sets out our plans to achieve these targets, meet Heathrow 2.0 obligations and deliver our consumer outcome of 'I am confident I can get to and from the airport'.[15] This includes a range of interventions to influence passengers and colleagues, decarbonise vehicle trips and reduce impacts on local communities. Below, we highlight five key aspirations for 2022 to 2026 which will contribute significantly to the achievement or monitoring of our targets. Further details about these interventions and our other proposals can be found on pages 16 to 38.

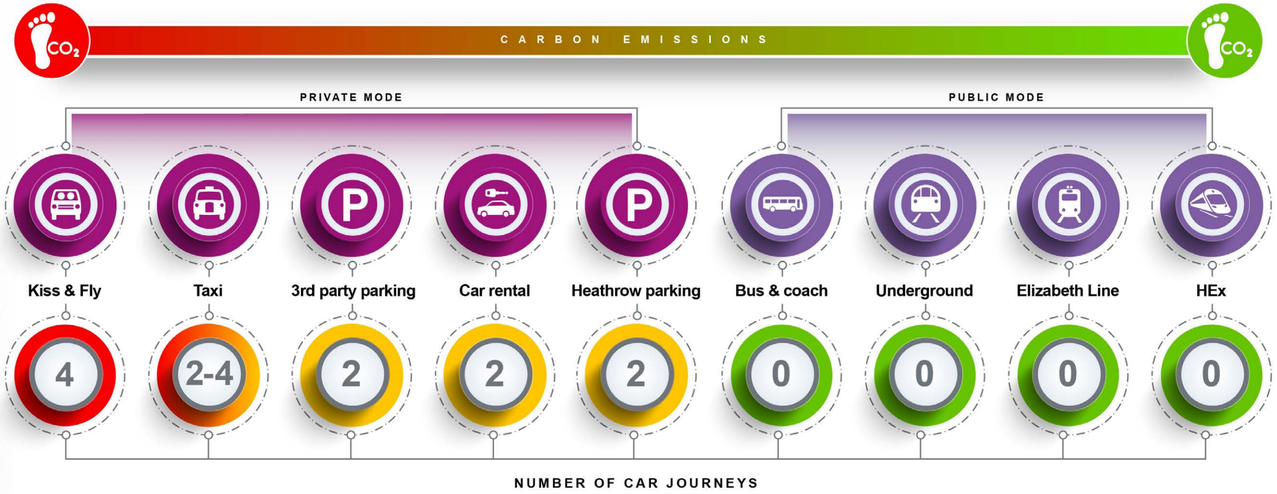
1. Launch our Sustainable Travel Zone (STZ).
2. Enable cycling to and from the Central Terminal Area (CTA).
3. Implement a new colleague car parking strategy to manage demand and encourage more sustainable travel.
4. Implement an annual colleague travel survey with a robust methodology for monitoring mode share.
5. Support the launch of all phases of the Elizabeth line to maximise passenger and colleague modal shift to public transport.

[15] Heathrow Airport H7 Revised Business Plan – Update 1

Increasing passenger public transport mode share

Our plans for surface access enable passengers to travel with a choice of safe, fast, easy, reliable and sustainable transport options that meet their needs as consumers. Interventions have been developed which provide improved connections and facilities, increase awareness of options and manage demand for less sustainable modes. Interventions aim to move passengers along the surface access spectrum (see figure 4) towards modes which involve fewer car journeys and have lower carbon emissions.

Figure 4: ***Surface Access Spectrum: Passenger***
Based on on-airport, ground carbon footprint



Increasing passenger public transport mode share – *continued*

Providing improved connections and facilities

Improving surface access connections and facilities increases the choice and quality of passengers' sustainable transport options. Improvements also grow our catchment, opening the airport up to new populations.

Elizabeth line integration

The Elizabeth line will deliver a significant improvement to public transport connectivity to Heathrow, initially via the opening of the central section in May 2022, and even more so when direct, through-running services begin later in 2022. It will provide a direct rail connection from Heathrow across central London to the West End, the City of London and Canary Wharf, with up to six services per hour serving the airport in each direction. The introduction of the Elizabeth line is the most significant change to Heathrow's public transport proposition since the introduction of the Heathrow Express in 1998 and Heathrow Connect in 2005. It is forecast to increase the number of people living within a 1.5 hour public transport journey time (with a maximum of one change) by almost 20%.

New trains on the Elizabeth line have air conditioning and ample standing room. The work to prepare the Heathrow rail infrastructure for the arrival of the Elizabeth line trains has been completed. We will aim to maximise the benefits of the Elizabeth line through promotion, wayfinding and signage in the airport terminals, and work with Transport for London to ensure promotion and signage to Heathrow from elsewhere on the route.

This will deliver the benefits of a better consumer experience, an increased passenger public transport mode share and a bigger catchment. It will also deliver an alternative service for colleagues from central and east London through quicker journey times and potentially cheaper travel.

Heathrow Express

Heathrow Express provides the fastest, non-stop service between the airport and central London, running four trains an hour between Heathrow and Paddington. The premium service gives passengers a wider choice of rail options to London at a range of price points; London Underground, Elizabeth line and Heathrow Express. Cheaper Heathrow Express fares that match tube prices are available when booking in advance.

Heathrow Express tickets are available digitally via partnerships around the world, ensuring that international travellers have access to public transport options when booking their travel in advance. We will look to grow our partnerships over the coming years to maximise mode share.

The Heathrow Express vision is to give passengers the best airport transfer service in the world. This vision drives an excellent customer experience which Heathrow Express will look to improve further to maximise mode share. Maximising Heathrow Express mode share will contribute to our overall passenger public transport mode share and decarbonisation targets, as well as reducing congestion and delivering the wider benefits associated with this.

Increasing passenger public transport mode share – *continued*

Figure 5: ***2015 baseline total airport-related Annual Average Daily Traffic (AADTI flow)***

Source: Heathrow[16]

[16] AADT derived from 2015 base year in HHASAM v2.0 model

Introduce new bus and coach services

Over the next five years we plan to bring back Heathrow support for bus and coach services. We are working with local authorities and service providers to identify improvements to our bus and coach network to increase our catchment, drive growth in passenger numbers and help achieve our surface access outcomes. Increasing public transport mode share will help to reduce congestion and support our carbon and sustainability goals.

We will continue to review existing services to see if additional benefits for Heathrow can be achieved. Where benefits justify the investment, we will consider providing kick-start funding to new services that support our aims by filling gaps in the public transport network where we know demand exists.

We will manage our operational expenditure proportionally in line with passenger growth. As a result, passenger-focused investment in bus and coach services is more likely from 2023 onwards. New coach services will be assessed, based on the benefit to the passenger. Routes we invest in will be determined by this assessment, but could include new coach routes to Kent and other areas underserved by public transport.

Increasing passenger public transport mode share – *continued*

Introduce new park and ride options

In the absence of any major new rail links in the time period of this SAS (2022 to 2026), we will investigate new park and ride (P&R) opportunities for passengers to transfer from private vehicles onto public transport to travel to Heathrow. Most private-vehicle traffic approaches Heathrow via strategic road network corridors (M3, M4, M25 and M40). Identifying opportunities for park and ride at strategic locations along these routes will enable passengers to transfer onto high frequency, fast and reliable bus or coach routes for the last leg of their journey to the airport. Figure 5 shows routes with high daily flows of airport-related traffic which could be targeted for park and ride.

We have already worked with the Oxford Bus Company to serve High Wycombe P&R with a 25-minute journey to Heathrow Terminal 5, and a 35-minute journey to the Central Bus Station. The route started serving the P&R in April 2020, and has since seen usage continually grow. The latest available data (June 2022) showed around 350 boardings a week at the High Wycombe P&R stop. The service has reduced the number of vehicle trips to Heathrow and delivered a range of associated benefits on the most polluted and congested part of the network: less congestion, reduced carbon emissions and improved air quality.

We intend to build P&R connections by making use of existing sites and working with local authorities, highway authorities and bus and coach operators to ensure they are well served by routes to and from the airport.

Depending on distance travelled to the P&R site, some users' main travel mode will remain private vehicle. However, the additional demand will enable higher frequency services to operate viably, which will benefit passengers and local colleagues. Enabling P&R will therefore contribute to an increase in public transport mode share for passengers and improvements in carbon output, air quality and congestion near Heathrow. Colleagues would also benefit from new P&R opportunities.

Passenger car parking

Some passengers do not have suitable public transport alternatives to driving, so we need to provide high-quality parking options to ensure we deliver an excellent overall passenger experience. The number of car parking spaces we can provide is capped to manage demand. So we are not proposing any change in the number of spaces over the next five years to compensate for the lack of viable alternatives that new heavy rail projects would have given passengers.

The number of trips generated by passengers travelling to and from our car parks is two per travelling party (one to reach the airport before they fly out, and one to leave the airport after they fly back). This is more efficient in comparison to passengers being dropped off and picked up which generally generates four trips per travelling party. Passengers choosing to use a high-quality parking offering at Heathrow is therefore preferable to passengers being dropped off or picked up as it generates less congestion, lowers carbon emissions and is better from a wider sustainability perspective.

We are developing plans to introduce a more efficient valet/meet & greet product, which will result in fewer journeys around the airport. We are also developing a ZEV strategy to ensure that we support the uptake of ZEVs amongst all user groups, including passengers using our car parks.

Increasing passenger public transport mode share – *continued*

Building awareness of other options

Heathrow is already well-connected by public transport from many areas of the UK, but our passengers are not always aware of the sustainable travel options available to them. We will improve information available to passengers at all stages of their journey, including when booking airline tickets and searching for onward travel options when they arrive at the airport. Improving passenger awareness of sustainable travel options will increase the likelihood of choosing to travel on public transport.

Increase awareness of public transport connections

The most significant opportunity over the period of this SAS is the launch of the Elizabeth line. Promotion of the Elizabeth line will ensure passengers know that they now have much faster, direct travel between Heathrow and the places where they live, work and visit. We will work with Transport for London as well as third party providers at the airport to maximise the benefits delivered by the introduction of the Elizabeth line.

We will work with service providers to promote services in their local areas, particularly when new links are introduced, to increase passenger volumes. We will improve physical information and wayfinding at the airport, as well as the digital information available to passengers, ensuring public transport options such as coaches are promoted.

Making it easier to buy public transport tickets

Passengers use a variety of means to plan their travel to and from the airport. Many passengers do not currently have direct touch points with Heathrow before arriving at the airport, which can make it challenging to encourage sustainable travel.

We could potentially give passengers the ability to purchase public transport tickets directly through the journey planner on Heathrow.com. We will look into this and other forms of public transport ticketing (such as Mobility as a Service [MaaS]) in the coming years, and make improvements aimed at increasing use of public transport by passengers.

MaaS refers to digital transport service platforms that enable users to access, pay for, and get real-time information on, a range of public and private transport options. The key point about MaaS is that it enables users to buy transport services as packages based on their needs, instead of buying separate tickets for each mode of transport on their journey. MaaS has the potential to make it easier to travel sustainably, growing our public transport catchment and contributing to increasing our passenger public transport mode share.

We will work in partnership with airlines to provide information and opportunities to purchase tickets for onward journeys from Heathrow (known as interlining). For example, Heathrow Express tickets can be booked through Aer Lingus. In 2019, for example, around 24,000 Heathrow Express journeys were purchased through this method. Increasing the availability of interlining will contribute to increasing our public transport mode share for passengers. We will explore the most appropriate method for doing this, which could involve further bilateral agreements, or a more co-ordinated approach where airlines using Heathrow must agree to provide certain information or ticket options as a condition of using the airport.

We have recently worked in partnership with Google Maps to enable Heathrow Express tickets to be purchased through the site. This makes it easier for passengers searching for travel options to buy tickets for a sustainable form of transport, making it more likely they will choose to travel in this way rather than in a private vehicle.

Increasing passenger public transport mode share – *continued*

Managing demand for other modes

Investing in sustainable transport modes alone will not be enough to reach our passenger public transport mode share target. We need to manage demand for private transport modes to ensure sustainable travel options are chosen by a large proportion of our passengers.

Terminal Drop-Off Charge (TDOC)

On 1 November 2021 we implemented our TDOC, a £5 charge for all private vehicles (including PHVs and taxis) dropping off at terminal forecourts. The scheme aims to prevent a car-led recovery from Covid-19 and reduce airport-related traffic.

Income from this charge goes into the single till and will therefore contribute towards new sustainable transport initiatives at the airport, as well as helping to lower overall airport charges.

Vehicle access and drop-off charging is commonplace in urban areas and at airports around the world. Heathrow was the last major UK airport to introduce such a charge: similar drop-off charges were already in place at the other nine major UK airports. The Terminal Drop-Off Charge replaces our previous plans to introduce a Heathrow Ultra-Low Emissions Zone (HULEZ) by 2022 and a Heathrow Vehicle Access Charge (HVAC).

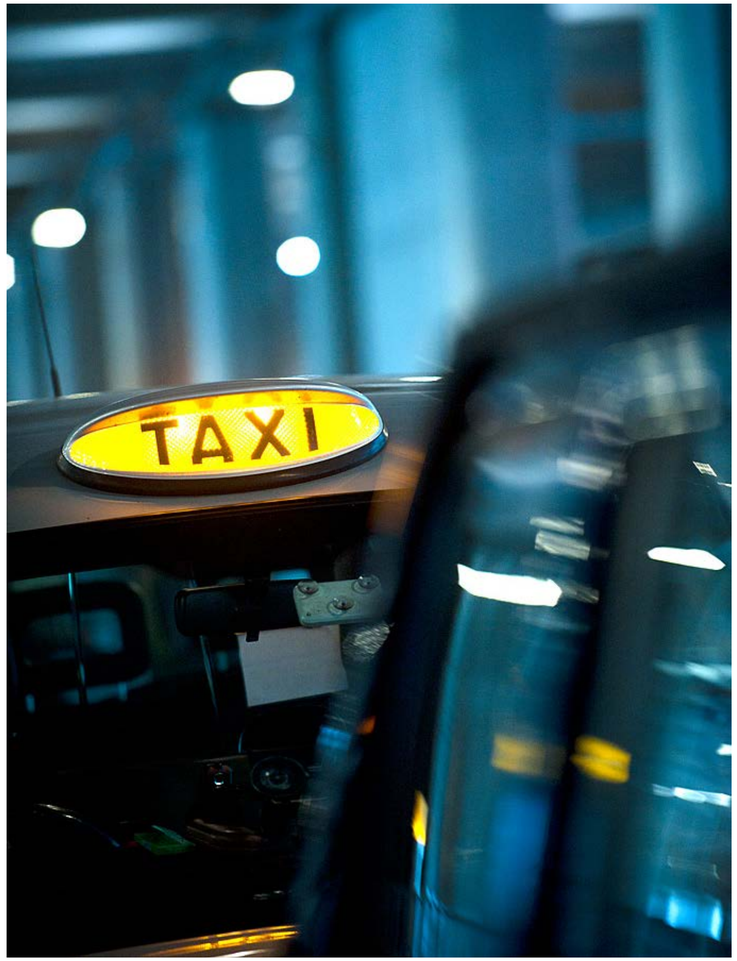
We will monitor and review the scheme which could be altered to achieve specific outcomes, if and when required. For example, to assist the transition to zero emission vehicles and improve local air quality, we could introduce differential charging.

The TDOC is expected to make a small contribution to the achievement of our passenger public transport mode share target by disincentivising travel to the airport by private modes.

Transport for London's (TfL) Ultra Low Emission Zone

From May to July 2022, TfL consulted on plans to expand its ULEZ to the whole of Greater London, including Heathrow. Drivers of vehicles that don't meet the standards would need to pay a £12.50 daily ULEZ charge to drive within the expanded zone. This would contribute towards modal shift, improved air quality and reduced carbon emissions, but it will negatively impact some Team Heathrow colleagues and local airport-related businesses by increasing their operating costs. Heathrow supports the goals of the ULEZ expansion and will work with TfL to minimise and mitigate any impacts.

Increasing passenger public transport mode share – *continued*



Implement taxi and PHV demand management strategies and backfilling

Taxi (also referred to as hackney carriages) and PHVs together are an important mode of transport for our passengers accessing the airport. The taxi and PHV mode share remained relatively consistent at around 25% until 2012, but has since grown steadily since then to over 30%. This growth coincides with the introduction of ride-hailing apps, which are now responsible for almost 40% of taxi and PHV passenger trips to Heathrow.

We are aware that some PHV drivers choose to wait in local residential areas before driving to the airport, which impacts negatively on our local communities. We have already taken steps to reduce this, including setting up a dedicated PHV waiting area (our Authorised Vehicle Area) and working with some operators to ensure drivers can only obtain trips from the airport if they are waiting there, and not in local roads. We will continue to work with local authorities and other stakeholders to reduce this negative impact over the coming years.

We will also monitor mode shares while developing and implementing strategies to manage demand for taxis and PHVs in ways that help achieve our passenger public transport mode share target. We will identify and assess various interventions, which could include a permit scheme for taxis and PHVs. A permit scheme would strengthen our influence over taxi and PHV operations at the airport. It would allow us to make their journeys more efficient, and create a better match between supply and passenger demand.

To improve the efficiency of taxis and PHVs, we will introduce a backfilling scheme to reduce the number of trips that are made without a passenger on board. The aim is to match passengers flying into the airport with drivers dropping off passengers who are about to fly out. This would increase the number of taxis and PHVs operating with passengers in both directions, and reduce the number arriving or leaving empty. The exact process is still to be determined, but could include incentives for operating backfilled journeys. By making journeys more efficient, emissions from road transport would also decrease, supporting our long-term sustainability goals and benefitting local communities. The resultant reduction in vehicle movements will ease congestion on airport roads, local roads and the nearby SRN, improving resilience and journey time for other road users.

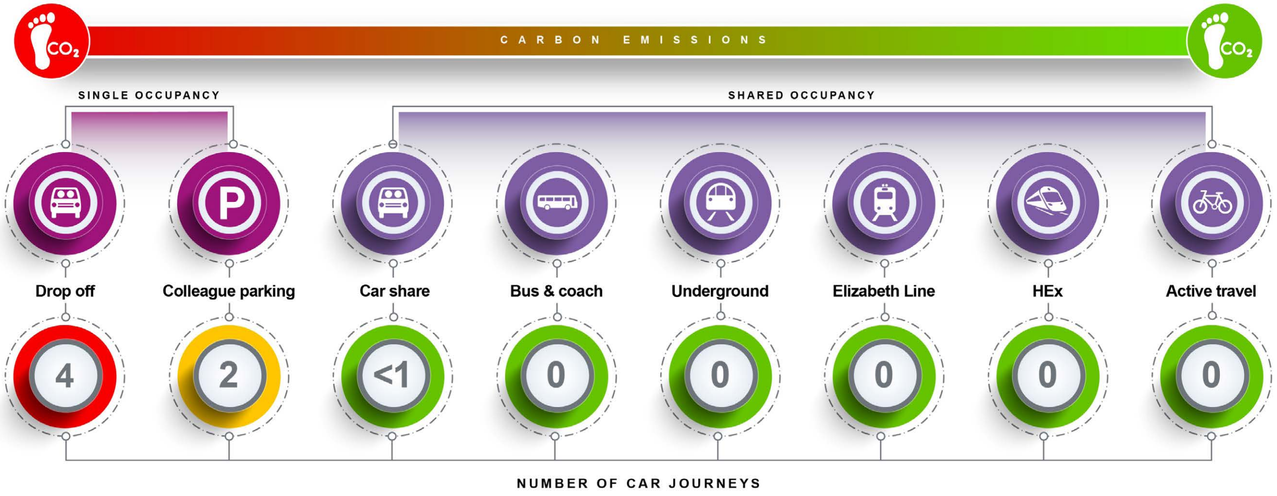
We are also looking into improving the queuing system at the Taxi Feeder Park (TFP). We would like to replace the existing queuing system (in which taxis move forward in batches) with a virtual queuing system that involves no physical movements. This would enable greater uptake of EV charging at the TFP, and reduce unnecessary idling and emissions.

Reducing colleague single-occupancy-vehicle mode share

Our vision for colleague travel at Heathrow is to transform how colleagues get to, from and around the airport. We want public transport, car sharing, walking and cycling to be the default choices for colleague travel, supported by new and improved services, better infrastructure and improved travel information. To achieve this, we will also need to manage car parking differently and create a step-change in the current culture of car use as the main mode of travel to work.

Our plans for surface access will reduce the cost of commuting for colleagues and provide more sustainable travel options that will improve colleague wellbeing through active travel and easier journeys. Interventions have been developed which provide improved connections and facilities, increase awareness of options and manage demand for less sustainable modes. Interventions aim to move colleagues along the surface access spectrum (see figure 6) towards modes which involve fewer car journeys and have lower carbon emissions.

Figure 6: ***Surface Access Spectrum: Colleague***
Based on on-airport, ground carbon footprint



Reducing colleague single occupancy vehicle mode share – *continued*

Providing improved connections and facilities

Improving surface access connections and facilities gives colleagues more choice and a better quality of sustainable transport. This will help reduce their single-occupancy-vehicle mode share.

Sustainable Travel Zone (STZ)

Our top priority was to launch our new STZ, which we did in January 2022. The STZ will deliver multi-modal improvements covering rail, tube, bus and coach services and active travel. The STZ aims to:

- Reduce colleague single-occupancy-vehicle trips to, from and around the airport, and encourage colleagues to travel by public transport and active travel.
- Provide better travel options for our local communities (many of whom are Team Heathrow colleagues) for journeys to work or for leisure.

The STZ has been developed according to design principles agreed with our stakeholders, including HATF. These are:

1. **Data Led:** proposals will be informed by knowledge of where colleagues live and need to travel to; current and past usage of services; take up of prior subsidies, including the Heathrow Travelcard; and future local authority and bus operator plans.
2. **Effective in delivering modal shift and resulting environmental benefits:** proposals will support a reduction in colleague single-occupancy-vehicle trips through providing travel options that are affordable, safe and convenient. Proposals will improve colleague wellbeing through more active travel and better journeys. Through supporting modal shift and incentivising operators to use cleaner vehicles, the STZ will deliver environmental benefits, including improved air quality and reduced carbon output.
3. **Scalable:** a three-year plan will provide operators and local authorities with an understanding of our full ambition, and how it will build incrementally as colleagues return to work and the workforce grows in the future.
4. **Easy to use:** we will ensure colleagues know how to access services through provision of a Heathrow Travel Wallet (further details on page 30), physical and online signage, branding, information and promotion.
5. **Equitable:** interventions will provide a fair system of support based on distance and deprivation in communities served. Interventions will be designed to provide all airport colleagues with an affordable journey to work.

Reducing colleague single occupancy vehicle mode share – *continued*

We will initially focus on a range of initiatives serving the areas where most colleagues live. **The delivery priorities of the STZ will be:**

PRIORITY 1

Ensure existing public transport operates at the times required by all colleagues. Many colleagues work early or late shifts which start or end at times when public transport is not always an option.

PRIORITY 2

Improve active travel options for those living close enough to walk or cycle. Further details on our plans for active travel are provided on pages 26 to 29.

PRIORITY 3

Improve campus connectivity by ensuring free, easy sustainable transport options are available for journeys needing to be made during the working day and for the first and last mile of commutes.

PRIORITY 4

Discounted travel. Bus service providers, particularly those operating from outside Greater London, will be encouraged to provide discounted tickets for Team Heathrow colleagues. This also includes some coach services where stops are within easy commuter distance.

PRIORITY 5

New or significantly improved services to serve new areas or improve the service on existing routes (eg increased frequencies).

The STZ replaces the Free Travel Zone and other bus and coach subsidies which provided improved services and incentives to use them. The STZ will contribute significantly to the achievement of our colleague mode share target and decarbonisation of surface access.

Reducing colleague single occupancy vehicle mode share – *continued*

Heathrow Express

Heathrow Airport Limited and Heathrow Express colleagues can travel on Heathrow Express for free whilst Team Heathrow colleagues receive a 75% discount. This discounted travel is in place to incentivise travel by public transport which will contribute towards the achievement of our colleague mode share and decarbonisation targets, as well as reducing congestion, improving air quality and improving colleague wellbeing.

Elizabeth line

The Elizabeth line will provide significant benefits to both passengers and colleagues. The new line will provide direct links to Essex and to central, east and south-east London. This will give commuting colleagues, many of whom may drive at present, with a fast and easy sustainable travel option. The Elizabeth line will also enable new areas to benefit from employment at Heathrow by bringing them within commuting distance. This includes areas that can connect by High-Speed 2 (HS2) at the new Old Oak Common Station, which is expected to become the busiest interchange station in the UK from the early 2030s.

Improve bus and coach waiting facilities

We will enhance bus and coach waiting facilities at the airport to improve the customer experience and ensure passengers and colleagues feel comfortable and secure during their journey. This includes both the waiting environment itself and the provision of information, such as rolling out real-time information more widely across the airport.

Making bus and coach services easier to access through real-time information and by providing a more pleasant waiting environment will make it more likely that colleagues will commute by public transport instead of private cars.

Bus priority

We will improve bus-journey-time reliability by implementing bus priority measures, where required, on airport roads, and by working with local authorities and TfL to provide sufficient bus priority on routes to and from the airport. Speed and reliability of journeys are not only key to our passengers, but our colleagues as well.

We will continue to work with local authorities on plans for bus priority outlined in their Bus Service Improvement Plan submissions in 2021. We have had great success doing this in the past, for example, working with Slough Borough Council on bus lanes on the A4 between Slough and Heathrow, a key route for the 4,000 colleagues who live in postcode areas benefitting from the improvements.

Improve active travel infrastructure and service

We want to deliver a step-change in active travel provision for colleagues over the next five years. Currently, only 1% of colleagues cycle to work, so there is significant opportunity to increase this to contribute to the achievement of our surface access targets.

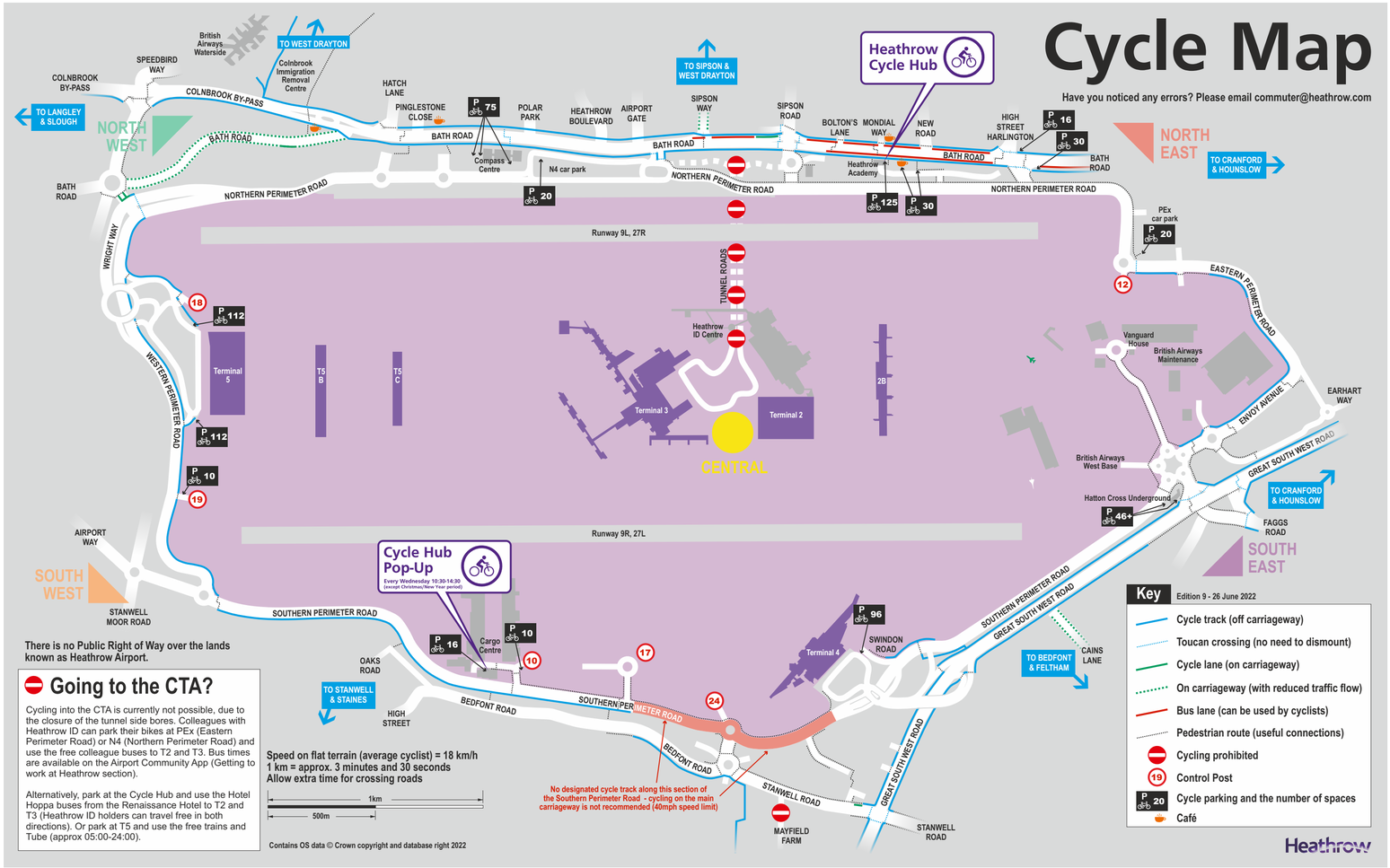
Postcode data from Team Heathrow colleagues with active ID passes (as of March 2021) show that over 30% of colleagues live within 10km of the airport. The high proportion of colleagues living close to the airport presents a significant opportunity to support greater use of active travel as a means of travelling to and from work.

The Heathrow Airport Colleague Travel Survey 2021 found that almost half of all colleagues would consider cycling to work if conditions were improved. This suggests that many living further than 10km from the airport would also consider cycling, which could be achievable for some given the flat environment around the airport. The survey found that 16% of colleagues would consider cycling if routes to and around the airport were made safer. End-of-trip facilities – secure cycle parking, showers and lockers – would also encourage colleagues to cycle to and from work.

There is a range of cycle infrastructure on Heathrow's perimeter roads, including shared-use paths and toucan crossings. There are also key gaps in infrastructure which need addressing to enable safe cycling around the airport (see Figure 7).

Reducing colleague single occupancy vehicle mode share – *continued*

Figure 7: ***Heathrow Airport Cycle Map***



Source: Heathrow [17]

[17] Heathrow Cycle Map

Reducing colleague single occupancy vehicle mode share – *continued*

We are planning active travel improvements over the next five years to contribute to the achievement of our colleague mode share and decarbonisation targets, including:

CTA Cycle Routes/Cycle Parking

Colleagues commuting to and from the CTA cannot currently cycle directly to their place of employment. Instead, they must park their bicycle at the airport perimeter and transfer to the CTA on a bus. This has been the case since 2014 while maintenance of the CTA northern tunnel takes place.

The CTA northern tunnel side bores will be available for use by cyclists and pedestrians (subject to a fire risk assessment) from 2023 when the tunnel maintenance project is programmed to be complete. This will enable colleagues to cycle directly to employment locations in the CTA for the first time in almost a decade.

We are developing proposals for high quality active travel routes within the CTA and north of the tunnel, integrating with wider active travel networks. We will also provide cycle parking and other end-of-trip facilities (including showers and lockers) as close to key employment locations as possible.

Implement safe and direct active travel routes on campus

To encourage more trips by sustainable modes we need to improve cycle and walking routes on the Heathrow campus. These changes will enable movement between transport hubs, local authority and TfL networks and employment locations. This will encourage colleagues to consider active travel on their journey to work and for getting around the Heathrow campus for work.

We are planning for high quality segregated infrastructure, wherever possible, which fills the gaps in existing infrastructure. We will also improve signage and wayfinding for pedestrians and cyclists, to make it easier to navigate the airport's roads, following the most appropriate route to their destination. These projects will be prioritised for delivery based on available budget and the benefits they will deliver.

Improve active travel routes to and from the airport

We will work with local authorities, TfL and other organisations to improve active travel connections to the airport. This will be done through working closely with the individual organisations, as well as through HATF Special Interest Groups and Heathrow Strategic Planning Group.

Figure 6: ***Existing bi-directional cycle track in the CTA***

Source: Heathrow

Reducing colleague single occupancy vehicle mode share – *continued*

Secure cycle parking

We will ensure there is secure cycle parking at key employment locations at the airport, supported by appropriate welfare including changing facilities, showers and lockers.

Cycle hire

We will explore the possibility of integrating local authority cycle hire schemes into the airport through implementing docking stations at key terminal locations. This will encourage some colleagues to try cycling if they do not currently have a bike. It will also be a good option for colleagues working shifts who want to take public transport for the leg of their commute they make when it is dark, and use a hire bike for the leg of their commute they make in daylight.

Heathrow Cycle Hub

Heathrow has a flagship Cycle Hub, operated by Runway Cycling, which offers colleagues free bike servicing, 10% discounts on all bikes and accessories and ad-hoc offers. We maximise the benefits this offers and enable as many colleagues to access it as possible. We want to create a cycling culture at the airport and provide support for colleagues cycling to work.

Introduce P&R sites

We plan to enable new P&R opportunities for passengers and colleagues to transfer from private vehicles onto bus or coach for the final leg of their journey. Depending on distance travelled to the P&R site, some colleagues main mode will remain private vehicle. However, the additional demand enables higher frequency services to operate viably, which will benefit passengers and local colleagues. This will therefore contribute to the achievement of our passenger mode share, colleague mode share and decarbonisation targets.

Car sharing

Heathrow already operates one of the largest car-share schemes in the UK. We are working with our car-share provider to drive up registrations and increase the number of colleagues who share cars. We already have priority parking for car sharers in prime locations within car parks and will review demand for this ensuring priority over colleagues who drive alone.

Reducing colleague single occupancy vehicle mode share – *continued*

Building awareness of other options

There is significant scope to increase Team Heathrow colleague awareness of the support that's available to them for sustainable travel. A 2021 colleague-travel survey found that only 41% are aware of our Heathrow Commuter website and only 39% are aware of the Heathrow Cycle Hub. This suggests there is a huge opportunity to deliver behaviour change as many colleagues are unaware of support for sustainable modes of travel. We plan to increase this awareness in several ways as set out below.

Communications and Way2Go campaign

We already have a Heathrow Commuter website, monthly email newsletter and colleague travel information on our airport app, available to all Team Heathrow colleagues. We know we need to increase the number of colleagues this information reaches, and to raise awareness of sustainable travel options and support available to colleagues.

We will be relaunching our colleague-focused campaign in 2022, using our Way2Go branding to drive awareness and behaviour change. This will include a range of electronic and printed materials as well as roadshows at key employment locations including terminals and the Cargo Centre.

Incentivisation

We will also be trialling a Way2Go incentives app, aiming to encourage colleagues to travel sustainably. The app will allocate points to colleagues when they travel sustainably (walking, cycling, public transport or car share). Once a colleague has earned sufficient points they will be able to convert them to airport or high street shopping vouchers. Should the trial prove successful in delivering modal shift, we will look to roll it out more widely and potentially incorporate the points in a Heathrow Travel Wallet.

Mobility as a Service (MaaS) and Heathrow Travel Wallet

We will work with DfT to shape the development of MaaS and, in the longer term, we will consolidate the broad suite of travel information, journey planning, public transport discounts, active travel incentives and our car-sharing programme under a single umbrella – the Heathrow Travel Wallet.

The Heathrow Travel Wallet will make it easier and more convenient for colleagues to use a range of more sustainable and active travel modes, and to reduce reliance on the car. This will be facilitated by taking advantage of emerging technology platforms.

We envisage that the Heathrow Travel Wallet will also provide a mechanism for colleagues to be rewarded for non-car travel, building on the Way2Go app trial and existing Heathrow Rewards system which allows points to be swapped for air miles or airport shopping vouchers.

Reducing colleague single occupancy vehicle mode share – *continued*

Managing demand for other modes

As with passengers, we know there will be a need to manage demand from colleagues for single-occupancy-vehicle trips. Management will help us achieve our colleague mode share and decarbonisation targets. We will look to do this in several ways.

Car parking strategy

We will influence demand through the way we manage colleague car parking. We are reviewing the potential to move from the current annual colleague car parking permits to a more flexible 'pay as you go' approach. Most employers pay for car parking permits for their employees. Regardless of who pays, a more flexible permit system would encourage some colleagues to travel differently for some of their commutes because it will save them or their employers money. The current system disincentivises travelling sustainably for some journeys as the car parking permit has already been purchased for the whole year.

We will also continue to monitor car parking demand as the airport recovers, with a view to consolidating colleague car parks as much as possible. Through this process there will be the opportunity to prioritise some of the more desirable car parks for car sharers.

HR policies

We will support the uptake in public transport and active modes for travel to work by introducing better working practices and policies at Heathrow. This includes a wide range of initiatives, from the promotion of agile working to reviewing employee benefit packages and targeting the advertisement of job applications in geographic locations that are more accessible by public transport.

HAL will lead by example in rolling out a package of HR policies for its own colleagues, and will work with other Team Heathrow employers to encourage them to follow suit. This will require us to support employers across the campus in the following areas:

1. Maximising the potential for agile working.
2. Encouraging employers to target recruitment campaigns in areas where new or enhanced public transport is being implemented.
3. Offering high quality travel advice to new recruits, providing them with information about sustainable transport options for travelling to Heathrow. HAL now imparts information on our STZ in job adverts and through our onboarding process. We will work with Team Heathrow partners to encourage them to do the same.

Supporting the uptake of zero emission vehicles (ZEVs)

For those vehicle trips that are still made to, from and around Heathrow, we will support the uptake of ZEVs to reduce carbon output and improve air quality near Heathrow. We will need to balance the provision of ZEV infrastructure with the need to reduce congestion through delivering modal shift.

Making it too attractive to drive a ZEV to or from the airport, or attracting non-airport users who want to charge, will result in congestion issues. They will impact our operational resilience and the ability of passengers, colleagues and freight to reach the airport on time.

Since the pause on expansion and onset of Covid-19 in March 2020, HAL has not progressed plans for electric vehicle (EV) charging, with a focus instead on repositioning the wider SAS to meet the needs of a two-runway airport with reduced budgets and passenger forecasts.

During this pause, the Government announced that, from 2030, no new petrol or diesel cars can be sold. A major shift to EVs is already underway: in 2021, more EVs were sold than in the previous five years combined, and Tesla's model 3 was the second best-selling new car of any type – fossil fuelled or electric.

We want to play our role in supporting the shift to ZEVs, by making sure the right infrastructure is available at Heathrow. It is likely some larger vehicles will switch to hydrogen which will also be considered as part of this strategy.

HAL will be developing its Landside ZEV Strategy to enable the uptake of ZEVs amongst a number of landside user groups. These user groups include:

Passengers – including those using Long Stay, Short Stay, Terminal Drop-Off or other products such as Meet & Greet

Colleagues – including private vehicles, e-bikes and e-scooters

Taxis

Private hire vehicles

Car rental

Bus

Coach

Freight – including freight travelling through the airport to overseas destinations and freight used on the airport such as construction logistics and the Heathrow Consolidation Centre amongst others

Each of these will have different needs as they shift to ZEVs. In some cases, it may make sense for Heathrow to invest directly in providing the right infrastructure, but more likely we will be partnering with commercial providers who are better placed than us to provide the right services to customers. In the business plan we have submitted to the Civil Aviation Authority (CAA), we have proposed £37 million investment during the next regulatory period in airside and landside EV charging.

Reducing the negative impacts of surface access on local communities

Improving public transport and active travel will not only benefit passengers and colleagues, but our local communities as well. In November 2020, Heathrow published a local economic recovery plan to combat the impacts on local communities of the pandemic-driven aviation downturn. The plan was developed in conjunction local councils, enterprise partnerships, education providers, business groups and chambers of commerce.

The plan highlighted the critical role that surface access plays in promoting safe and sustainable transport options to prevent a car-led recovery. The Heathrow Local Recovery Plan, which was updated in April 2022[18], continues to improve local connectivity (for example, by expanding the Sustainable Travel Zone) as the airport looks to recover. Despite this, local communities still experience negative impacts associated with travel to and from the airport. We will continue working over the next five years and beyond to minimise these as far as possible.

Working with our local communities

We will continue to listen to, and work collaboratively with, our neighbours, working with residents, community groups and local authorities to ensure the required measures are taken to minimise issues. This will include targeted enforcement, promotion of onsite waiting areas such as our Authorised Vehicle Area for PHVs, joint communications to operators or licensing authorities and reviews of roadside restrictions.

We have dedicated resources to ensure that we listen to the issues that residents experience and enable us to work together to resolve them. These include our community engagement forums such as the Council for the Independent Scrutiny of Heathrow Airport (CISHA) and the Local Community Forum (LCF), both of which are chaired independently. Our Community Engagement Team provides a helpline that residents can call or write to with queries on the issues they are facing.

Truck Call Forward

We have also considered options for reducing congestion in the cargo area and avoiding nuisance parking in local communities. To this end, we are working with partners to deliver a Truck Call Forward Facility on the southern perimeter of the airport. In times of congestion where parking at the Cargo Centre becomes full, the Truck Call Forward Facility will be used by cargo vehicles to park away from the road network before being called forward to collect or deliver air cargo.

This initiative will reduce congestion at the Cargo Centre and on the local road network. It will help to ensure that the cargo process is more efficient and provides drivers with much-needed welfare facilities.

The Truck Call Forward Facility will also be available for overnight parking for freight vehicles. We believe this will reduce the number of goods vehicles parking on local roads.

Increase cargo collaboration

Our expansion plans included a Virtual Consolidation platform to enable load sharing amongst neighbouring cargo forwarders. This aimed to reduce instances of cargo vehicles travelling with empty or minimal loads. We still aspire to Virtual Consolidation, and may undertake trials with willing operators in the coming years to increase collaboration and build an evidence base around the suitability of the concept. If successful, this will reduce the number of freight vehicle trips to and from Heathrow, contributing to our decarbonisation target.

[18] Heathrow Local Recovery Plan: Continuing our Momentum

Planning for delivery post-2026

Not all our plans can be delivered by the end of 2026. We will therefore continue working on interventions to be implemented as part of future Surface Access Strategies.

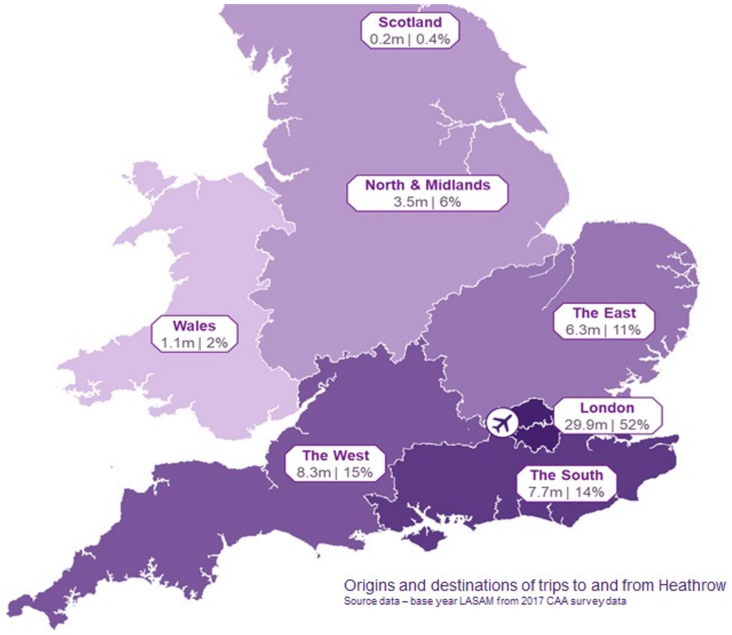
Western Rail Link to Heathrow (WRLtH)

The West of England is Heathrow's second largest catchment area (see Figure 8) but is currently underserved by direct transport links. We have identified the WRLtH as the optimum solution having considered alternatives such as increased bus and coach services.

WRLtH is a proposed Network Rail scheme which would deliver a new 6.5km (5km tunnel) rail link connecting Heathrow to the existing Great Western Mainline (GWML) (see Figure 9). Services would depart from Reading, allowing passengers to travel to the airport from the south coast, the south-west, south Wales and the west Midlands without going into London Paddington. Service frequency would be four trains an hour in each direction, with journey time from Reading to Heathrow T5 taking only 26 mins. Overall, Network Rail conclude that the project would ease congestion on some of the UK's busiest roads, the M4, M3 and M25, resulting in improved air quality and lower carbon emissions equivalent to about 30 million road-miles a year.[19]

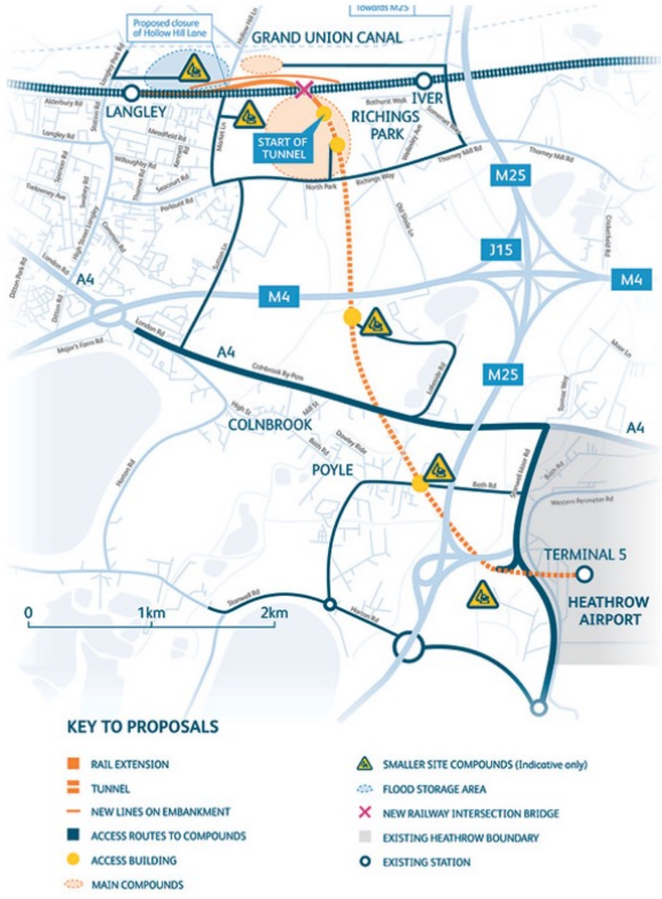
[19] Western Rail Link to Heathrow, Network Rail

Figure 8: ***Origins and destinations of trips to and from Heathrow***



Source: Heathrow

Figure 9: ***Proposed WRLtH***



Source: Network Rail

Planning for delivery post-2026 – *continued*

Previous discussions regarding the delivery of WRLtH and the associated Heathrow contribution have centred around the benefits it could provide as part of Heathrow's expansion programme. It was seen as a project which could 'support the obtaining of planning permission for expansion' under the CAA's surface access policy.[20]

Following the delay to the expansion programme as a result of the (since overturned) judgment of the Court of Appeal setting aside the ANPS, the CAA has confirmed through its H7 consultation documents, that while the expansion programme continues to be paused, it will set Heathrow's regulatory framework on the basis of a two-runway airport.[21]

An agreed future approach to the project funding for WRLtH is required to balance the contribution from Heathrow – which is influenced by future regulatory frameworks – against that from central Government and the value for money assessments that are associated with large scale infrastructure projects. Heathrow's proposed approach to calculating its contribution focuses on establishing the benefits accruing to air passenger users of the service, in alignment with the Civil Aviation Authority's surface access policy, as opposed to the benefits enjoyed by other non-airport users and the wider economy. The latter area is where Government financial support should be focused.

Given the financial constraints that Heathrow and the airline community are facing, investment in this project could not be a priority through H7, our regulatory period from 2022 to 2026. Circumstances for the WRLtH project have also changed, with the delayed DCO submission leading to a later entry into service date. This means that, to better align with the delivery of benefits to airport users, any financial contribution from Heathrow would likely be made in the H8 control period (2027 to 2031), rather than as part of our H7 plans.

Heathrow remains committed to the WRLtH and would like to continue to work with the DfT to ensure the successful delivery of the scheme while meeting stakeholder expectations given the significant benefits the scheme will deliver.

Southern Access to Heathrow (SAtH)

There is currently no frequent, direct rail link between Heathrow and Surrey, Hampshire and south west London. Southern Access to Heathrow (SAtH) would be transformational, filling a strategic gap in the public transport network – providing a better-quality service for Heathrow passengers and colleagues alike – while reducing the need to access the airport via less sustainable modes. SAtH also offers potential for wider benefits by providing the opportunity to change at Heathrow, creating new connections into London and to the north of England via the new link to HS2 at Old Oak Common.

At the time of writing there is no preferred scheme or promoter for this project. Further engagement is required with DfT and individual scheme promoters to identify the best option to provide this transformational public transport access to the airport from catchment areas in south and south-west London, and the wider south region. Heathrow is committed to improving access to the airport from the south and south-west London, and is committed to working with partners on the best solution. The DfT needs to set out a clear policy on private investment in rail infrastructure, which would enable promoters to take forward and deliver SAtH.

[20] CAP 1847: Economic regulation of Heathrow Airport Limited: an update on the CAA surface access policy, CAA
[21] CAP 2139: Economic regulation of Heathrow Airport Limited: Consultation on the Way Forward, CAA, page 8, paragraphs 11 and 12

Planning for delivery post-2026 – *continued*

High-Speed 2

The introduction of high-speed rail services linking London to the north will transform Heathrow's connectivity and catchment. Although HS2 will not provide a direct link to Heathrow, the airport will now be just one change away from Birmingham via the new Old Oak Common station, and subsequently from Manchester, Liverpool and Glasgow as part of later phases.

Phase 1 of HS2 is due to launch between 2029 and 2033. It will provide a link from central London to Birmingham in under an hour via a new station at Old Oak Common. Elizabeth line trains will stop at Old Oak Common, and Heathrow Express trains may also stop, providing up to ten trains an hour to Heathrow.

We are working with HS2 Ltd, Old Oak and Park Royal Development Corporation, TfL and Network Rail to ensure the design of the station at Old Oak Common meets the needs of airport passengers. This could include:

1. Ensuring the station design works as efficiently and conveniently as possible for Heathrow colleagues and passengers, including enhanced information provision and wayfinding to connecting airport services on the Heathrow Express and Elizabeth line. Ensuring the station configuration provides an attractive interchange proposition for passengers with heavy luggage.
2. Potential for Heathrow staff presence within Old Oak Common station, particularly during times of disruption, to support passengers and enhance the customer experience.
3. Ensuring the station design works as efficiently as possible for Heathrow colleagues, including provision of onward active travel facilities to encourage greater use of public transport for colleagues accessing the airport.

Future phases of HS2 will extend further north to link Crewe, Manchester and Leeds. However, these are not yet committed.

Employer recognition programme

HAL directly employs less than 10% of Team Heathrow colleagues. We therefore need to continue working with other Team Heathrow businesses to drive behaviour change in colleague commutes. Once we have improved the frequency of Team Heathrow colleague travel data collection to at least annually, we will look to implement an employer recognition programme that highlights the work Team Heathrow businesses are doing to encourage the uptake of more sustainable travel modes. We will use this as an opportunity to highlight best practice and encourage its uptake amongst other employers.

Delivery, monitoring and reporting

Delivery

To implement our strategy in a way that successfully achieves the objectives set out in this SAS, we will continue to engage and consult with key stakeholders, such as HATF, National Highways, DfT, Transport for London, local authorities, and bus and coach operators. This engagement underpins our success, particularly as many initiatives will require us to coordinate or partner with other organisations to ensure successful delivery.

Monitoring

We will monitor the performance of the SAS to ensure that we remain on track to achieve our targets.

Passenger mode share

At present, passenger travel at Heathrow is measured through surveys conducted by the Civil Aviation Authority. These surveys take the form of interviews with departing passengers, conducted throughout the year. They record information such as origin and destination, trip purpose, demographic data and, of relevance to the SAS, the arriving mode of transport, journey time and group size. They take place across 14 major airports in England and Wales, and have been running since 1991.

The CAA interviews throughout the year, with 75,000 interviews at Heathrow. The surveys usually follow a stratified sampling design (stratified by carrier, route and quarter), with interviews conducted at the departure gates. The interview data is then weighted based on actual traffic levels relating to the flight schedules for all routes.

Departing passengers are selected for interview using a strict sampling system. Interviews are weighted to the two-way passenger flow, under the assumption by the CAA that over the period, departing and arriving passengers will show the same characteristics.

For consistency and independence, we will continue using the CAA Departing Passenger survey data as our official performance metric for the monitoring of passenger travel against the targets set out in this SAS.

Delivery, monitoring and reporting – *continued*

Colleague mode share

For colleague travel, Heathrow undertakes its own colleague surveys roughly once every four to five years. The most recent survey took place in 2016/17. The survey is used to estimate the number and type of jobs at the airport, and includes questions about travel to work.

The surveys consist of two parts: an employer survey and an employee survey. The employer surveys are intended to determine the employment characteristics of companies that have a presence at the airport, and include questions on the number of people employed by each company. These surveys help determine the total colleague population at the airport.

Employee surveys gather information on the characteristics of colleagues at the airport, and include questions on job type, home location and method of travel to and from the airport.

A small-scale colleague travel survey was undertaken in 2021, but it was not possible to follow the same robust methodology for mode shares, including weighting by employee type and other factors. As such, it was not possible to use the mode share data from 2021 reliably. The full survey undertaken in 2017 is due to be repeated in 2022 or 2023 to provide updated colleague mode share data. Thereafter we plan to move to a robust annual colleague travel survey.

Decarbonisation

The Passenger Profiler survey data, collected through interviews of a sample of passengers, is used to monitor passenger mode share. After being weighted for the total number of departing passengers, the information is also used to calculate the total distances travelled by passengers by mode. These distances provide the basis for calculating carbon emissions. Changes in these distances, and crucially improvements in carbon efficiency, by mode will be used to monitor trajectory and progress towards the 2030 target of 49% reduction (relative to 2019 baseline).

A similar process is used to calculate emissions from colleague commutes. Moving to a robust annual colleague travel survey will provide the data required to monitor carbon emissions from colleague commutes, and track progress towards our targets.

Public transport catchment

We assess our public transport catchment for passengers using Geographical Information Systems (GIS) to analyse General Transit Feed Specification (GTFS) data, coach and rail stop data and Office for National Statistics (ONS) population data. Using a set of agreed assumptions, such as maximum walking distances and a maximum of one change, we can calculate the population within certain journey times of Heathrow.

As new services are implemented and others improved, we will repeat this analysis and report against our target to increase the population within certain public transport times of Heathrow.

Reporting

We produce an annual sustainability report which provides progress updates against all of our Heathrow 2.0 targets, including surface access, air quality and our carbon footprint. We will also report on progress against our SAS targets in an annual Travel Report. We published our first Heathrow Airport Annual Travel Report for 2019. We did not publish travel reports for 2020 or 2021 due to the impacts of Covid-19 but plan to resume for 2022 onwards.

We will also report regularly to HATF who will continue to scrutinise our plans and progress towards targets.

Heathrow