



Surface Access to Airports

Heathrow
—Taking Britain further—

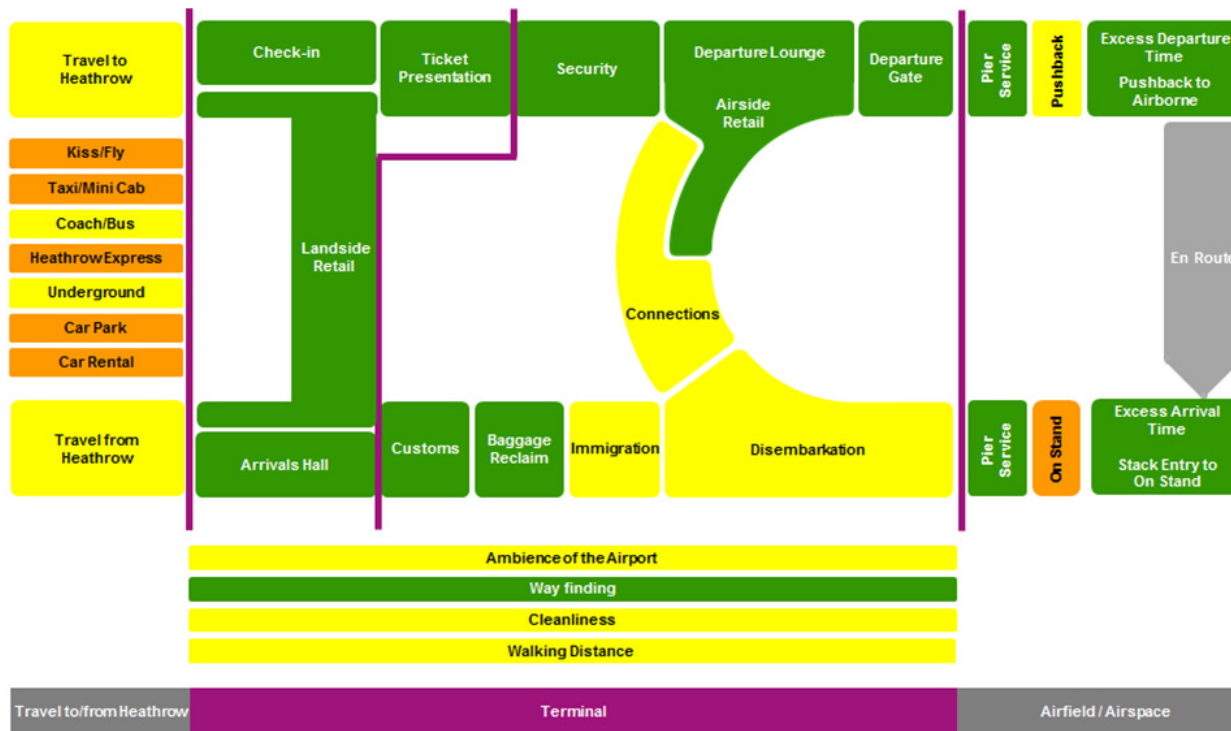
Surface access to airports is an important part of the passenger end-to-end journey

0.62

Correlation between Surface Access experience and Satisfaction with the LHR experience

0.53

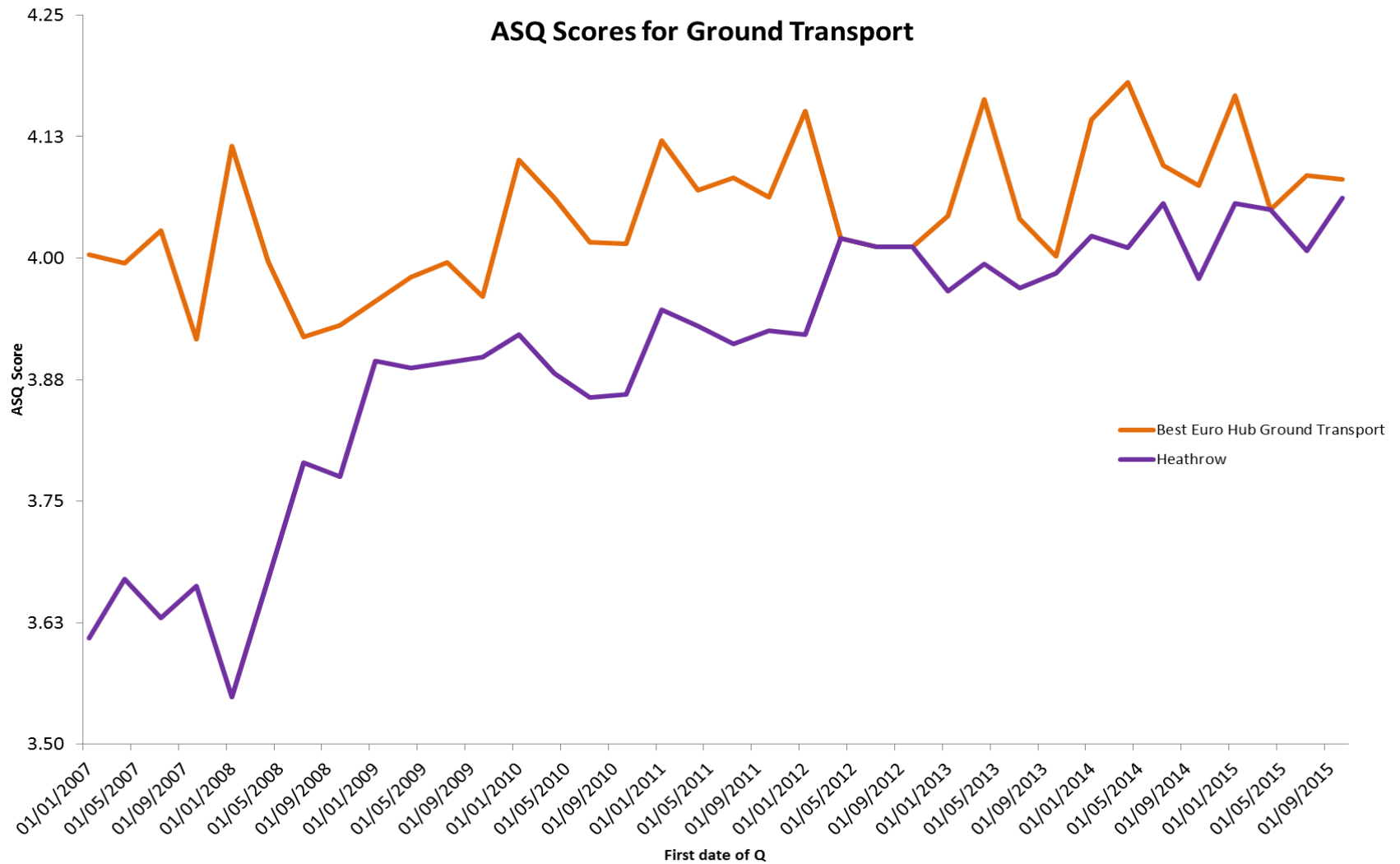
Correlation between Surface Access experience and Recommendation of LHR



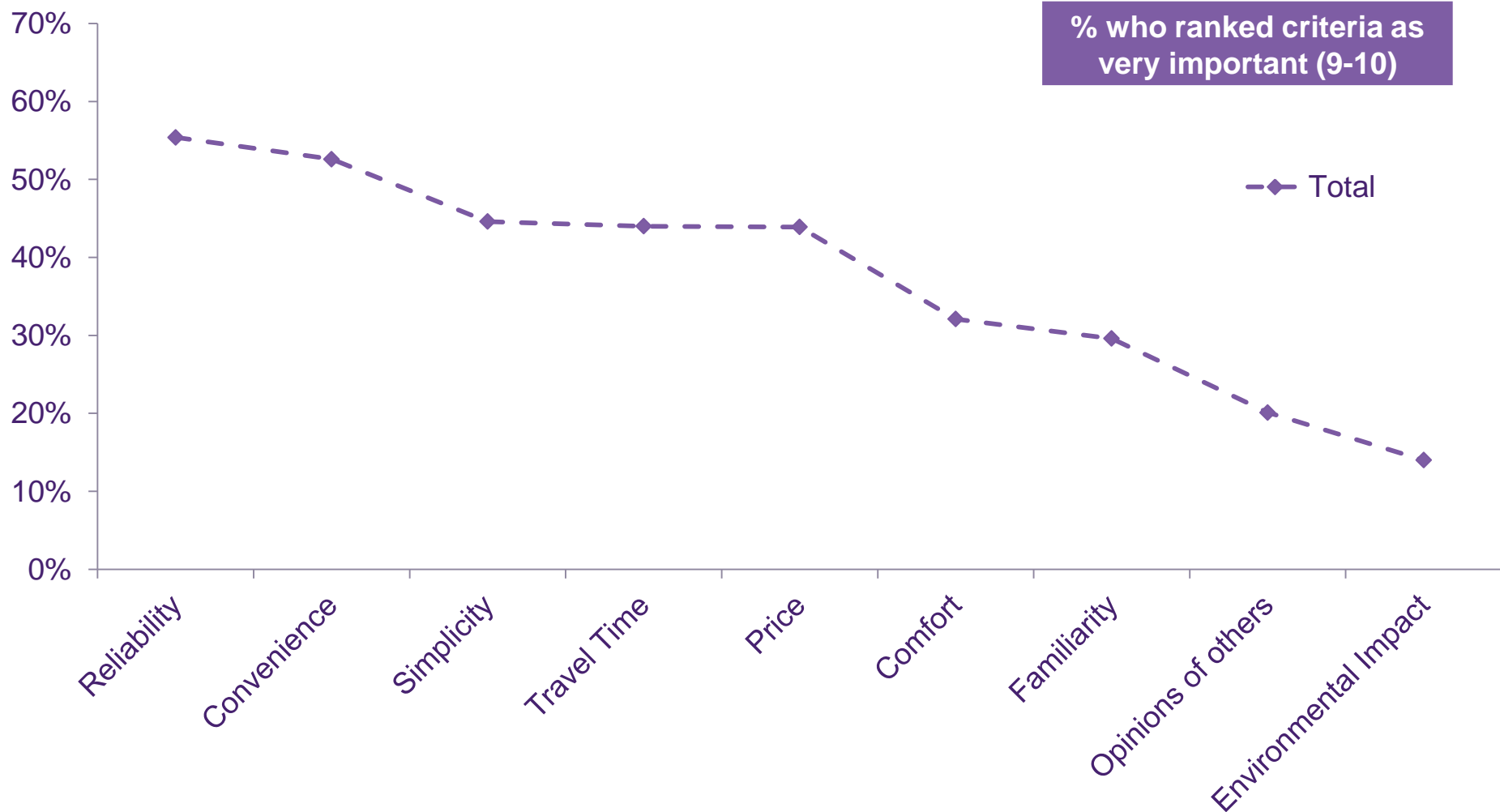
There are many different types of passengers with different needs...



Satisfaction with surface access has grown over time



Reliability and convenience are the most important drivers for choice of mode



Interchange is a barrier to use of public transport

Detail from Q3 2015 QSM report

Made changes	Yes	No
High frequency of service	4.21	4.31 ↑
Speed of service	3.99	4.13 ↑
Convenience	4.14	4.28 ↑
Punctuality of service	4.21	4.33 ↑
Crowding	3.41	3.56 ↑
Ease of purchasing ticket	4.32	4.38 ↑
Price	3.93	4.00 ↑

Not having to make changes results in a better experience across a number of measures

Ease finding way to LHR	4.37	4.52 ↑
Simplicity	4.24	4.45 ↑
Reliability	4.16	4.30 ↑
Convenience	4.18	4.36 ↑
Travel time	3.74	4.00 ↑
Comfort	3.56	3.64 ↑
Overall	4.06	4.19 ↑

Passengers who changed tube lines on way to Heathrow (“Yes”) gave lower scores across a range of metrics than those who didn’t (“No”).

	ASQ score	
	No Changes	2 or more changes
Ease of finding way to airport	4.52	4.16
Convenience	4.45	4.00
Simplicity	4.36	4.02
Travel Time	3.99	3.56
Overall	4.19	3.93

Source QSM detail report Q2 2015

Those that changed more than once score their journeys below 4.00

What problems do passengers have with interchanges?

Long walking
distances

Level changes

Anxious from
waiting
for/missing next
connection

Interchange not
designed for
baggage,
children, elderly

Confusing or
absent
wayfinding

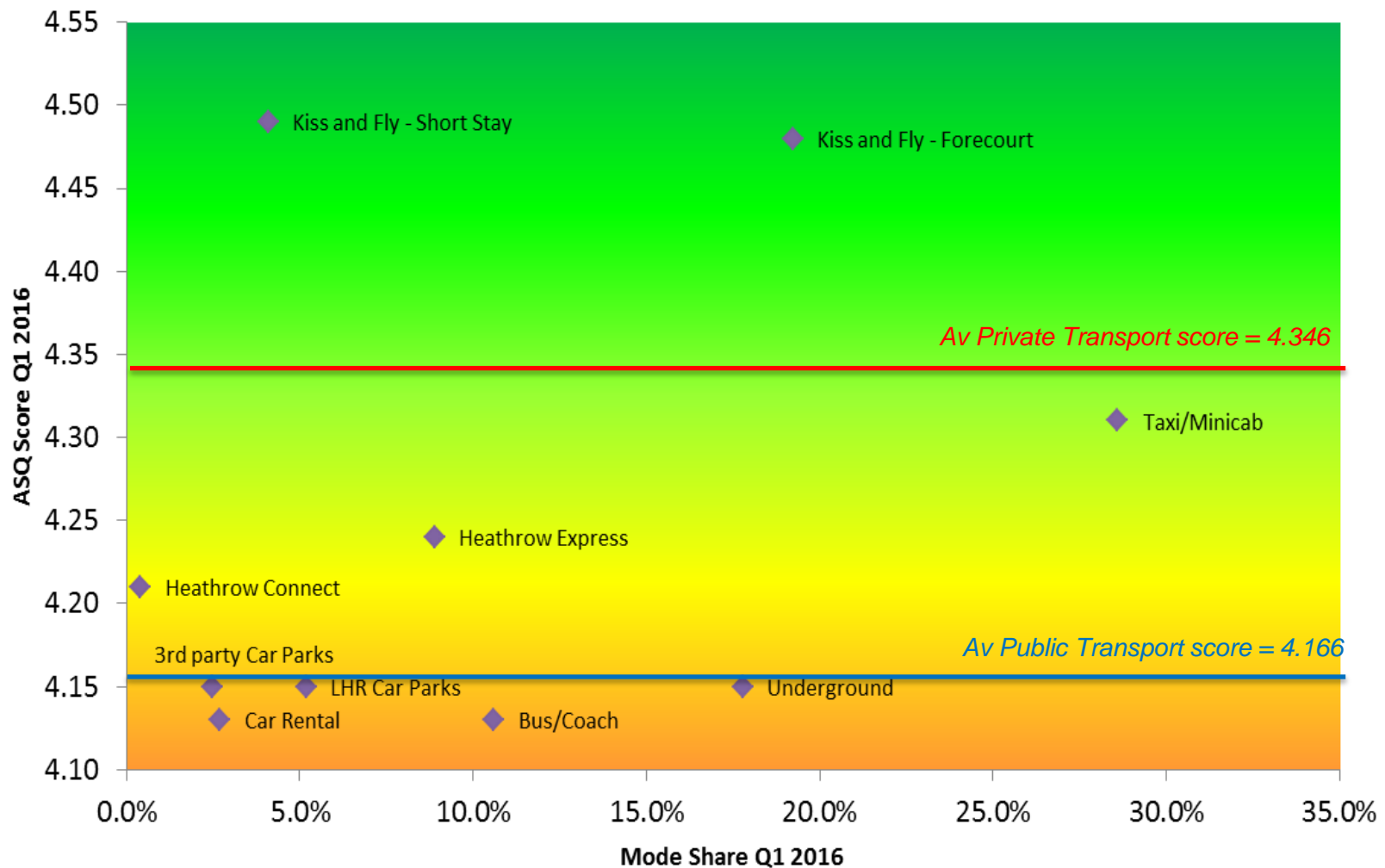
Lack of airport
related
information

Which terminal
does this service
go to?

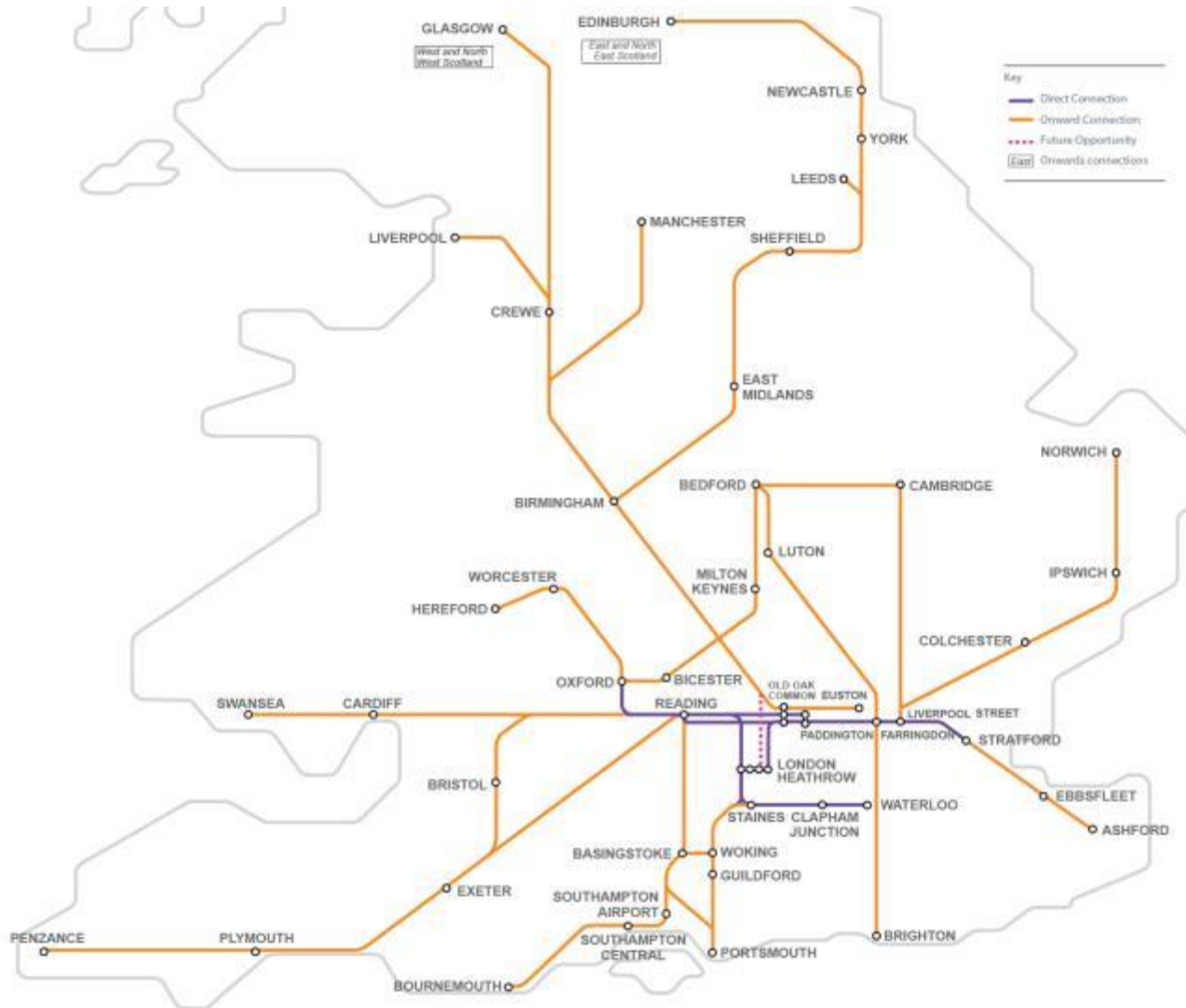
Wi-Fi coverage

No one clear
source of
information when
journey planning

All of which affects satisfaction with public transport



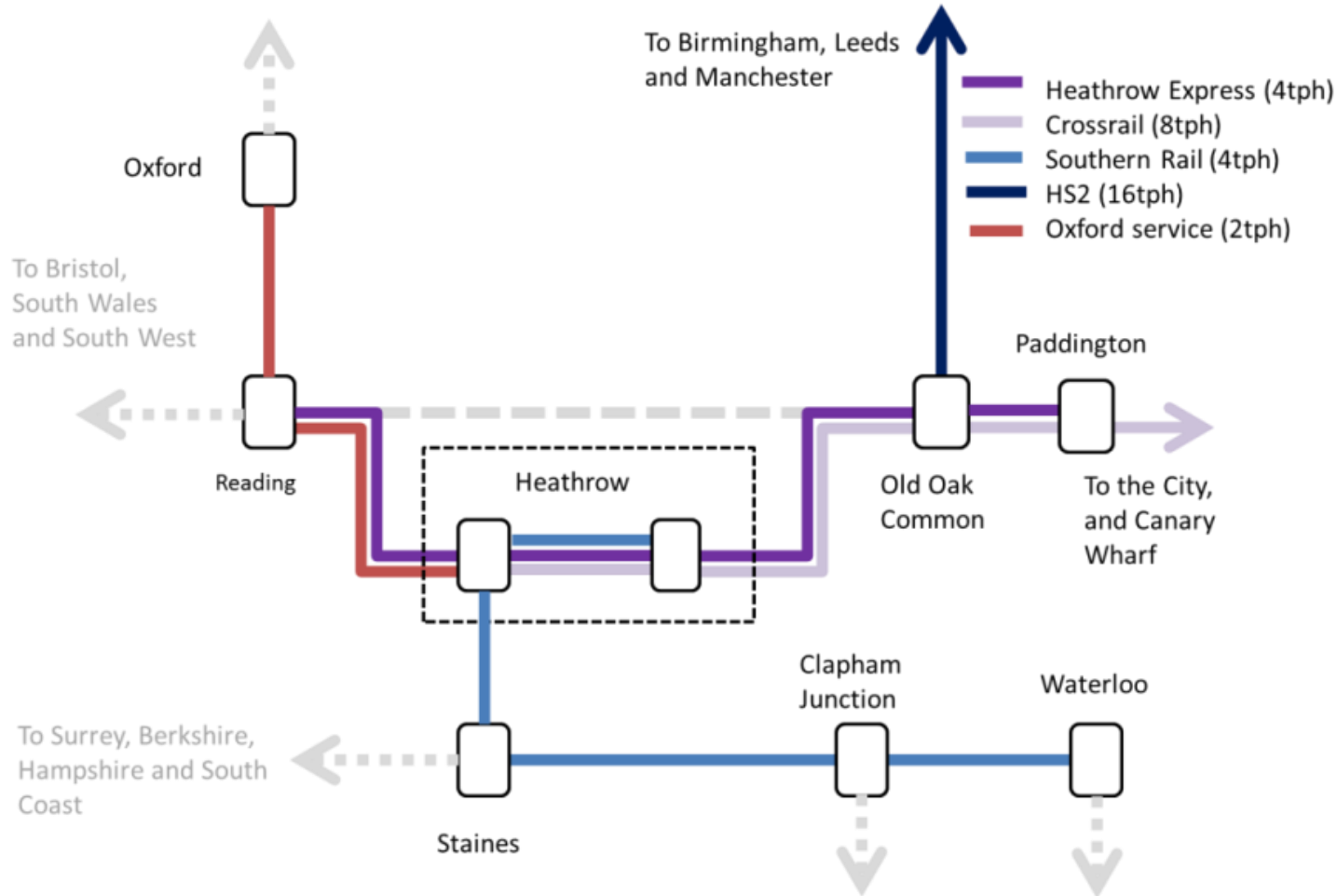
Our strategy will transform connectivity and place Heathrow at the heart of the rail network



2013:
18 trains per hour
5,000 seats / hour

2030:
36 trains per hour
13,000 seats / hour

Connectivity will be reliant on a number of key interchanges



Making interchanges feel like part of the airport experience...



Heathrow

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