

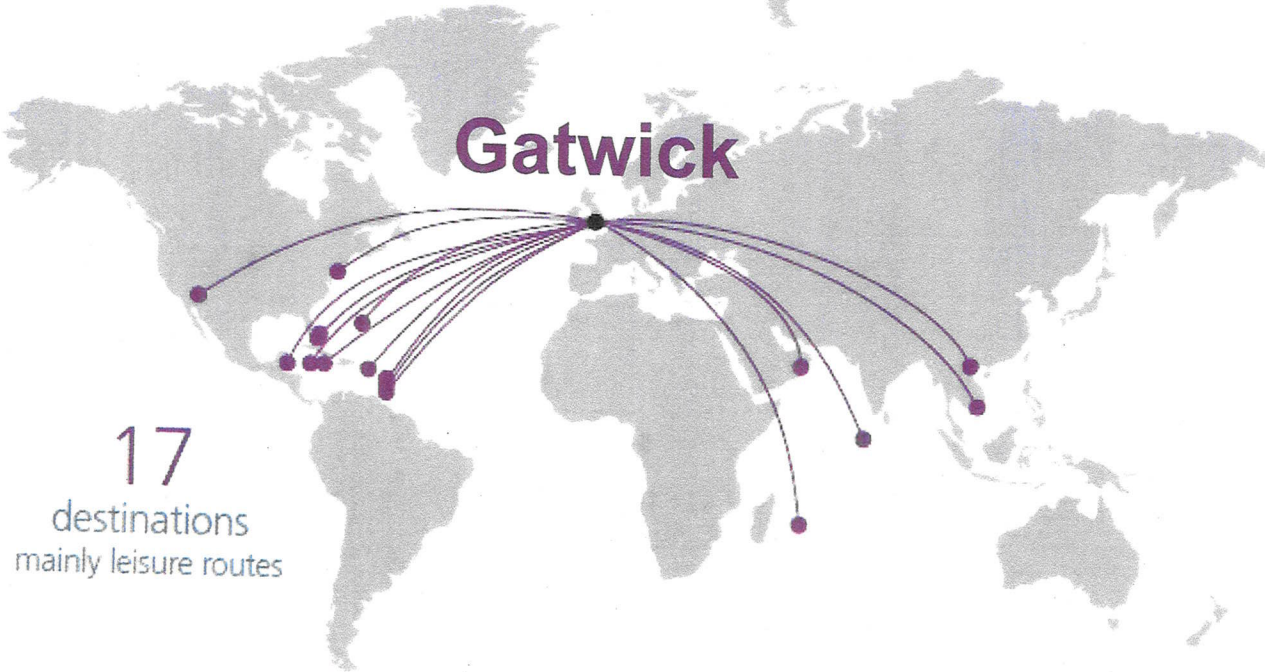
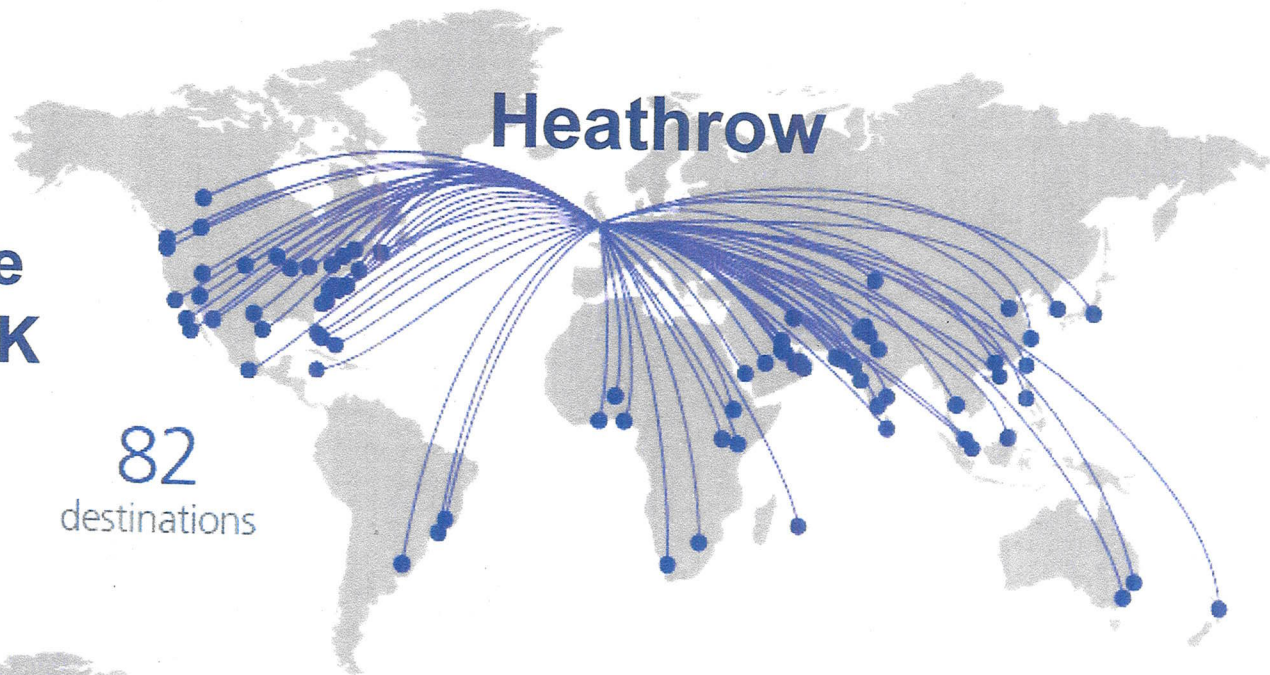


Heathrow and Wales

Clare Harbord
Corporate Affairs Director

Heathrow
Making every journey better

Connecting the whole of the UK to emerging global growth markets



Boosting the Economy: The prize on offer for Wales

	Heathrow	Gatwick
<p>Heathrow delivers greater economic benefits: Heathrow expansion will deliver nearly £10bn more to the economies of Wales, Northern Ireland & Scotland</p> <p>Heathrow will create more jobs than Gatwick: Expansion would create 10,500 jobs in Wales, Northern Ireland & Scotland – 7x that of Gatwick</p> <p>Heathrow handles over 14x as much freight: Exports by air contribute nearly £2bn to the Welsh economy and support 1,500 jobs</p>	<p>UK £112 - £211 billion</p> <p>Wales, N. Ireland & Scotland £25.2 billion</p>	<p>UK £42 - £127 billion</p> <p>Wales, N. Ireland & Scotland £15.7 billion</p>
	179,600	49,000
	1,420,000 tonnes	98,000 tonnes

Heathrow will deliver more high-value tourists to the Welsh doorstep to grow the 128,800 jobs already in the Welsh tourist sector

Connecting to Growth: It's easier than ever to reach Heathrow

New direct access to the Great Western Line will cut journey times from Cardiff by 37 minutes.



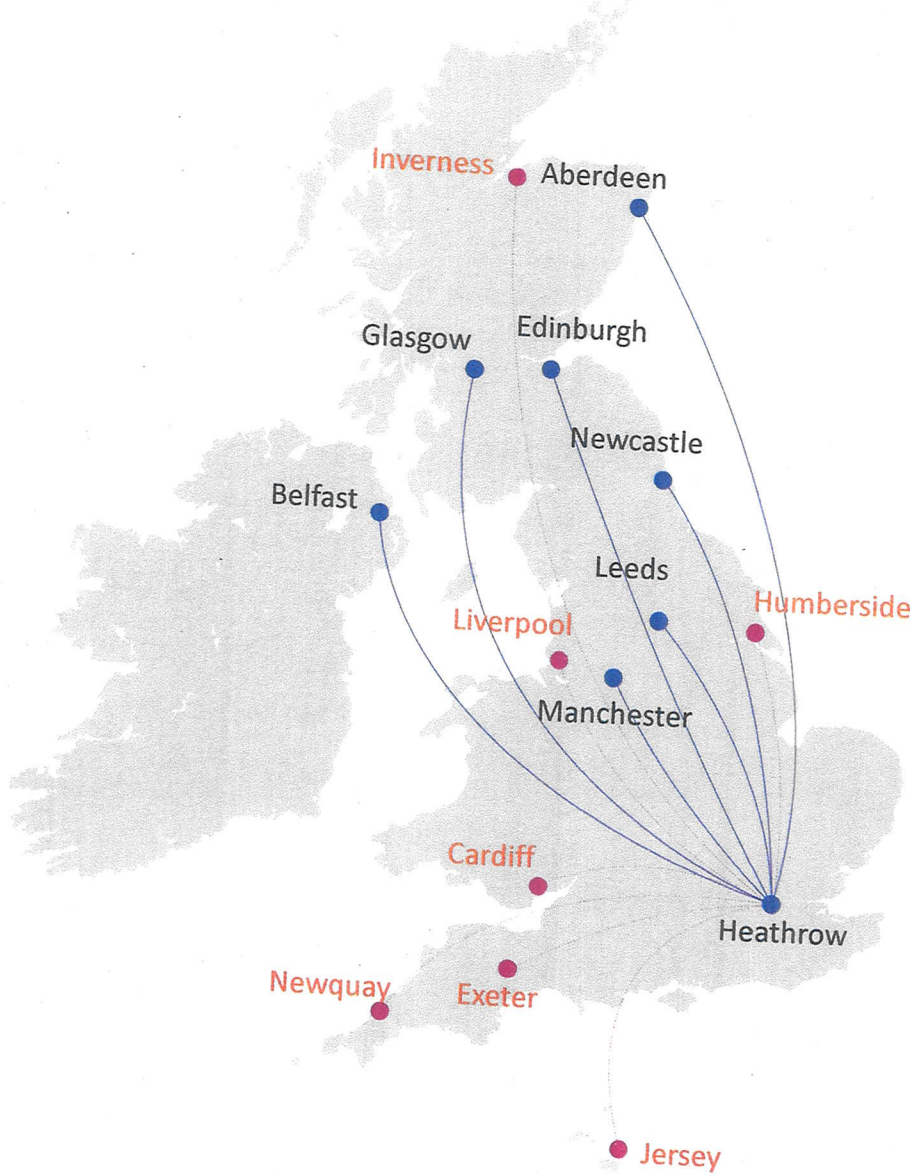
Key

- Direct
- Onward
- Proposed

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

2040:
40 trains per hour
15,000 seats per hour

Connecting to Growth: The National Connectivity Task Force



Member	Role
Lord John Shipley	Chair
Lord Hesketh	Dep Chair
Prof. Ben Derudder	Academic
Paul Hildreth	Academic
Neil Pakey	Ex AOA CEO
Sandie Dawe	Ex Visit Britain CEO
Sir Rod Eddington	Ex BA CEO
Derrick Murray	Scot
Dan Fell	NW & Yorkshire
Jenny Stewart	NW & Cumbria
Sir Peter Rigby	Mids
Suzanne Bond	SW
Iestyn Davies	Wales
Doreen Mckenzie	NI



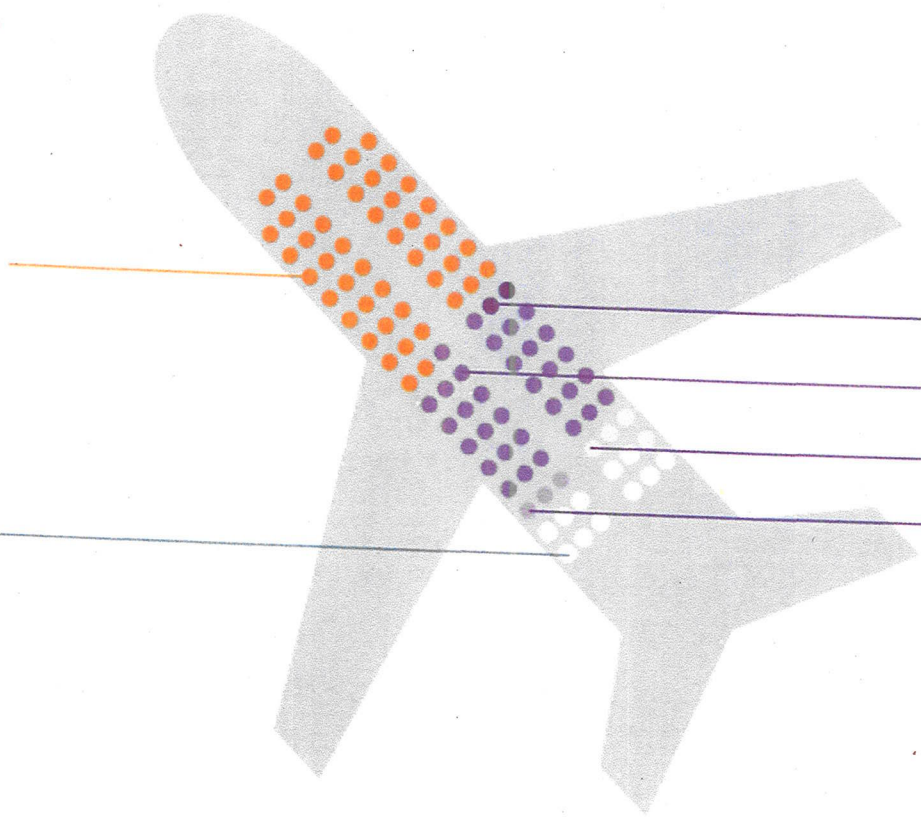
Complementing Cardiff: Why a bigger Heathrow is not a threat to Cardiff airport

A hub airport is uniquely important to establishing long-haul flights. Transfer passengers allow airlines to fly to more destinations more frequently than could be supported by local demand alone.

Direct passengers
from London to
Mexico City ...

48% direct
(163 seats)

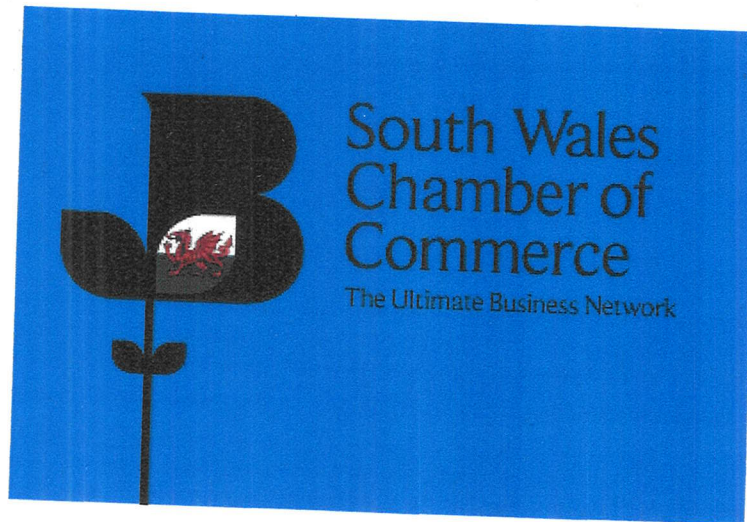
10% Spare capacity
33 empty seats



... made possible by
transfer passengers

- 2% connecting from UK regions (8 seats)
- 32% from Europe (108 seats)
- 4% from Middle East (14 seats)
- 3% from rest of the world (11 seats)

Backing Heathrow: With Welsh support, Heathrow is deliverable



“Connecting South Wales to the UK’s main air hub is a vital component for Welsh businesses. Moreover, it will make Wales itself a more attractive destination for businesses looking to invest in the UK.”

Rt Hon David Jones MP on Western Rail Access to Heathrow Airport



1

**The promise
of new
apprenticeships**

Heathrow expansion will double the number of apprenticeships across the airport to 10,000 and extend programmes to champion employability skills training in schools

2

**The promise
of new jobs**

Heathrow expansion will create more than 120,000 new jobs and has the potential to end youth unemployment in the five local Heathrow boroughs

3

**The promise
of connecting
every economic
centre in the
UK to growth**

Heathrow expansion will help rebalance the UK economy by connecting all of the UK's regions and nations to growth markets

4

**The promise
of new trade
and exports**

Heathrow expansion will enable a significant increase in UK exports to close the gap between the UK and our European competitors

5

**The promise
of a cleaner
and quieter
Heathrow**

Heathrow expansion will keep CO₂ emissions within UK climate change targets, meet local air quality limits and cut the number of people affected by noise by at least 200,000

Heathrow

— Taking Britain further —