



2016 Heathrow Investor Events

Service Transformation

September 2016

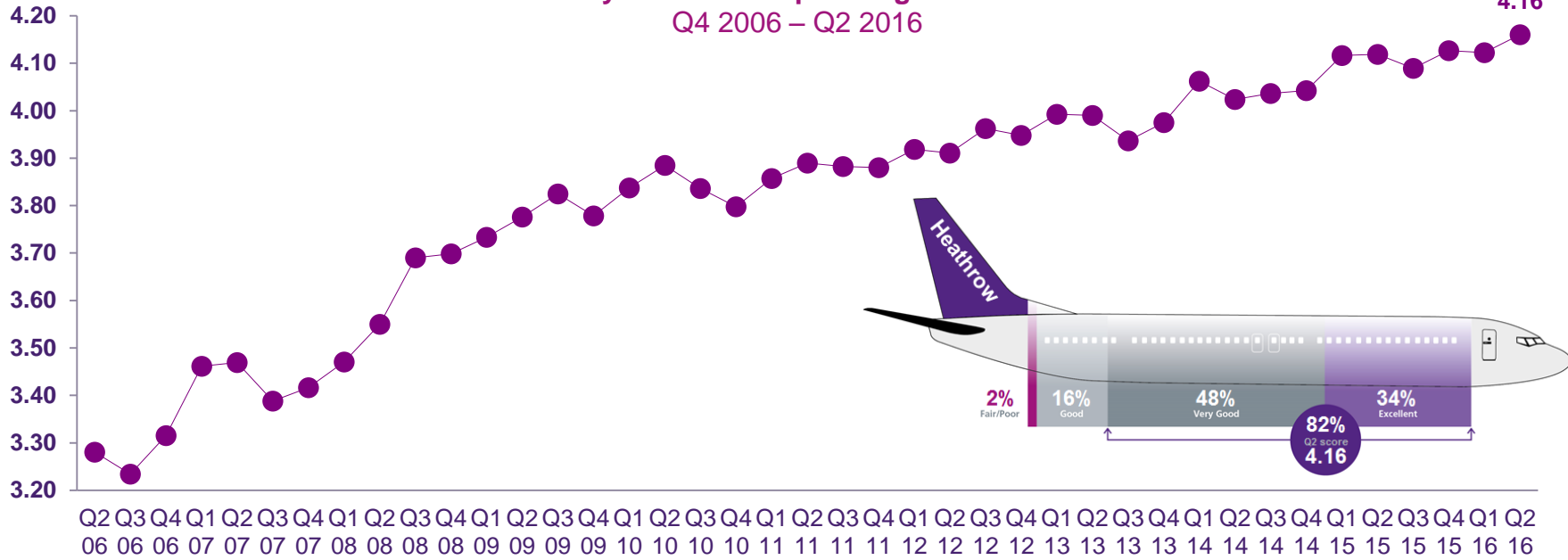
Heathrow
Making every journey better

Our vision focuses on passenger service

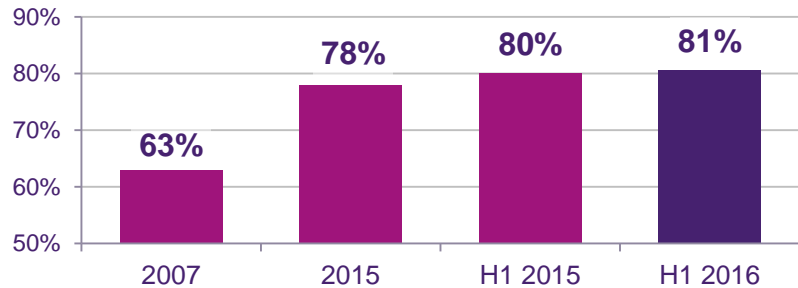
Vision	To give passengers the best airport service in the world						
Purpose	Making every journey better						
Priorities	 <p>Mojo</p>		→	 <p>Transform customer service</p>		=	 <p>Beat the plan</p>
				 <p>Win support for expansion</p>			
Values	 <p>Keeping everyone safe</p>	 <p>Treating everyone with respect</p>	 <p>Giving excellent service</p>	 <p>Working together</p>	 <p>Doing the right thing</p>	 <p>Improving every day</p>	

We are getting better...targeting Gulf airport service levels

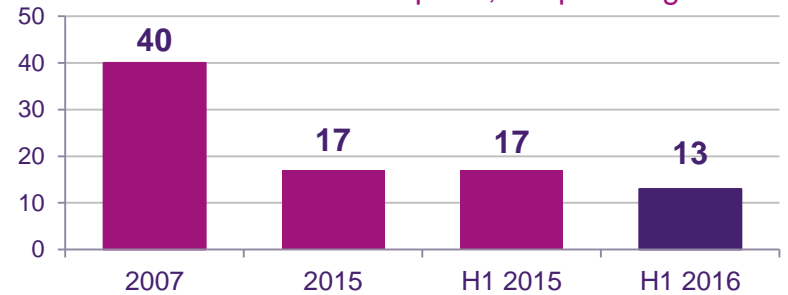
Quarterly ASQ overall passenger satisfaction
Q4 2006 – Q2 2016



Departures
within 15 minutes of schedule



Baggage performance
misconnect rate per 1,000 passengers



Rapidly improving service widely recognised externally



Heathrow - Best Airport in Western Europe
2015, 2016



Heathrow – World’s Best Airport Shopping
2010, 2011, 2012, 2013, 2014, 2015, 2016



Terminal 5 – World’s Best Airport Terminal
2012, 2013, 2014, 2015, 2016



ACI EUROPE Awards:

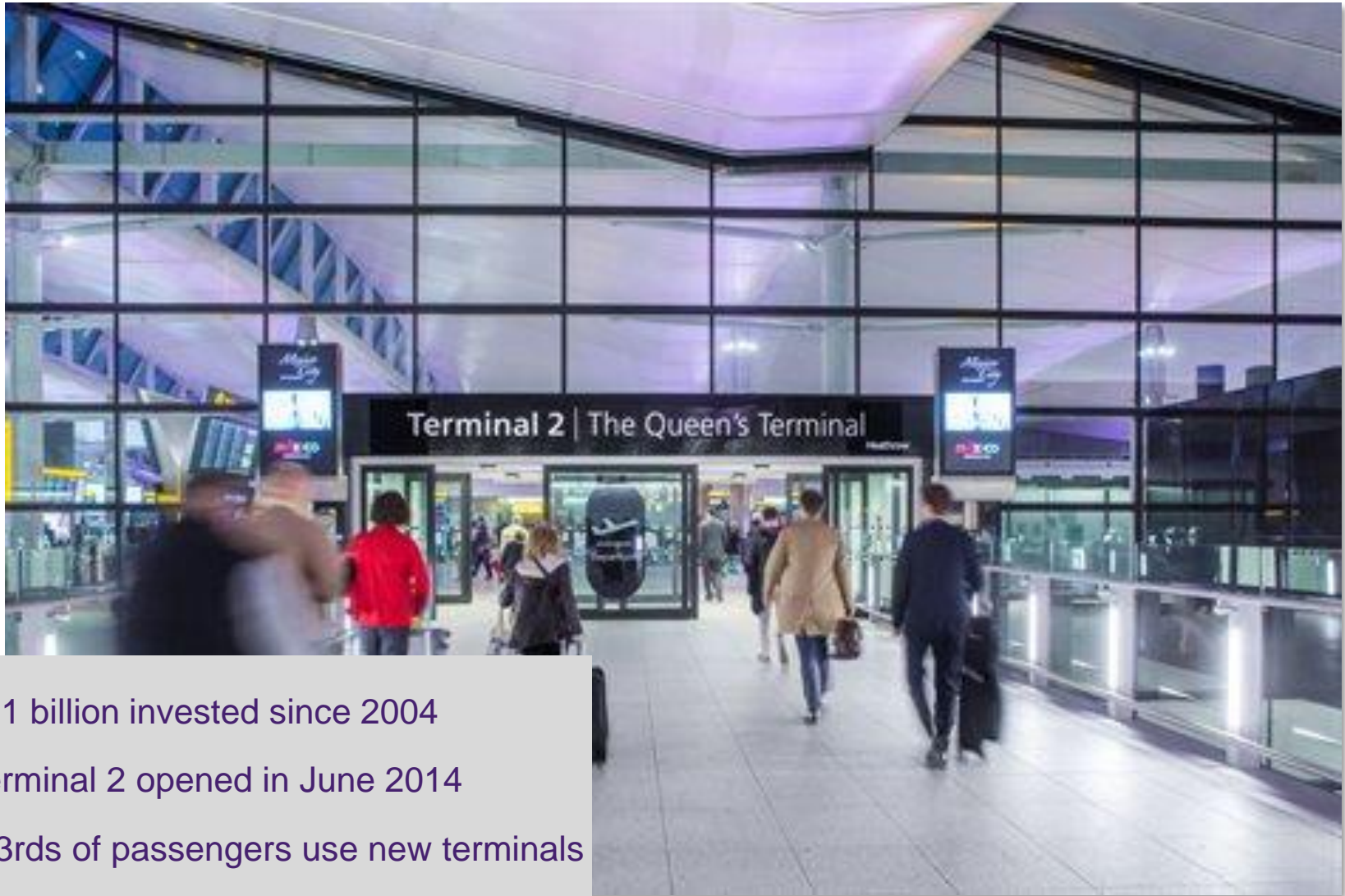
- Best Airport in Europe
- Eco-Innovation



ACI ASQ Awards:

- Best Airport in Europe
(over 40m passengers)

Better facilities



- £11 billion invested since 2004
- Terminal 2 opened in June 2014
- 2/3rds of passengers use new terminals

Better and more automated systems



- World's largest integrated baggage system
- Terminal 3 integrated baggage facility fully operational in 2016
- Baggage misconnects decreased from 19/1,000 in 2014 to 13/1,000 in H1 2016
- Terminal 5 baggage recovery facility
- New hold baggage screening by 2018

Better processes



- Airport Operations Centre (APOC) improves flow and reduces delay across end to end journey
- Consolidated 27 separate control rooms
- Controlling flow, matching capacity with demand
- Better punctuality
 - 2016: 81%
 - 2007: 63%

Better retail propositions



- Terminal 5 luxury redevelopment
- Terminal 5 World Duty Free expansion
- Terminal 4 retail clusters & experiential sites

Better passenger services



- 82% of passengers rate Heathrow experience 'Excellent' or 'Very Good'
- Soft initiatives complement facilities e.g. Mr Adventure, kids play areas, kids eat free enhance the family experience
- Retail and experience linked (Reach team, languages, personal shoppers)

Better airfield resilience



- World's first time based separation improves aircraft arrivals rate in windy weather
- Enhanced instrument landing systems enabling up to 6 extra arrivals per hour in low visibility

Better security experience



- New lanes increase Terminal 5's daily security processing by 9,000 passengers
- New escalators enhance transfer flows
- Parallel loading
- Differentiated security services for different passenger segments (e.g. fast track, family)
- Security cost per departing passenger decreased from £5.6 in 2013 to £4.8 in 2015

We are working on the next phase in Heathrow's transformation journey...

Transforming Heathrow through Service

Heathrow vision

To give passengers the best airport service in the world, we will...

Programme purpose

Inspire Heathrow to be the world's most passenger centric airport, so that..

Programme benefits

Passengers choose to fly through Heathrow now and in the future, through...

Programme capabilities



A unique and differentiated service style...



That is mapped and applied across all passenger journeys...



That is lived by all our colleagues every day...



And shared by all our partners in Team Heathrow.

Based on better understanding our customers

Journey mapping insights

About Helen

- 38 year old teacher
- Holiday and family visit to North America with husband and two children (under 8)
- Lives in a new build 4-bed house
- Free time is rare but she loves online shopping, reading her kindle and a glass of wine
- If the children are happy, she is happy

Feeling

- Finds travelling with children stressful and a logistical nightmare
- Embarrassed when children misbehave
- Excited for their holiday

Doing

- Carrying family travel documents, hand luggage and children

Thinking

- Children's welfare is key priority, as are basic human needs (toilets, food, water) and empathetic staff.



Helen's journey:



Experience:

"I start thinking about which airport to travel through at the time of booking."

Feeling

Excited



Insight:

The passenger's journey starts well before reaching Heathrow and finishes after the plane leaves the tarmac or a passenger's onward travel.

Opportunity:

Make it easy for families to start planning their journey through Heathrow at the time of booking.



Experience:

"Good to be able to check in online – one less thing to do at the airport."

Satisfied



Insight:

Providing passengers with tailored, personalised information ahead of their journey aids decision-making and helps prepare them for travelling through Heathrow.

Opportunity:

Offer personalised itineraries to raise awareness of food and drink, retail and activities that are relevant for families.



Experience:

"Difficult to find the best travel option to Heathrow. Choose the car and hit major traffic."

Anxious



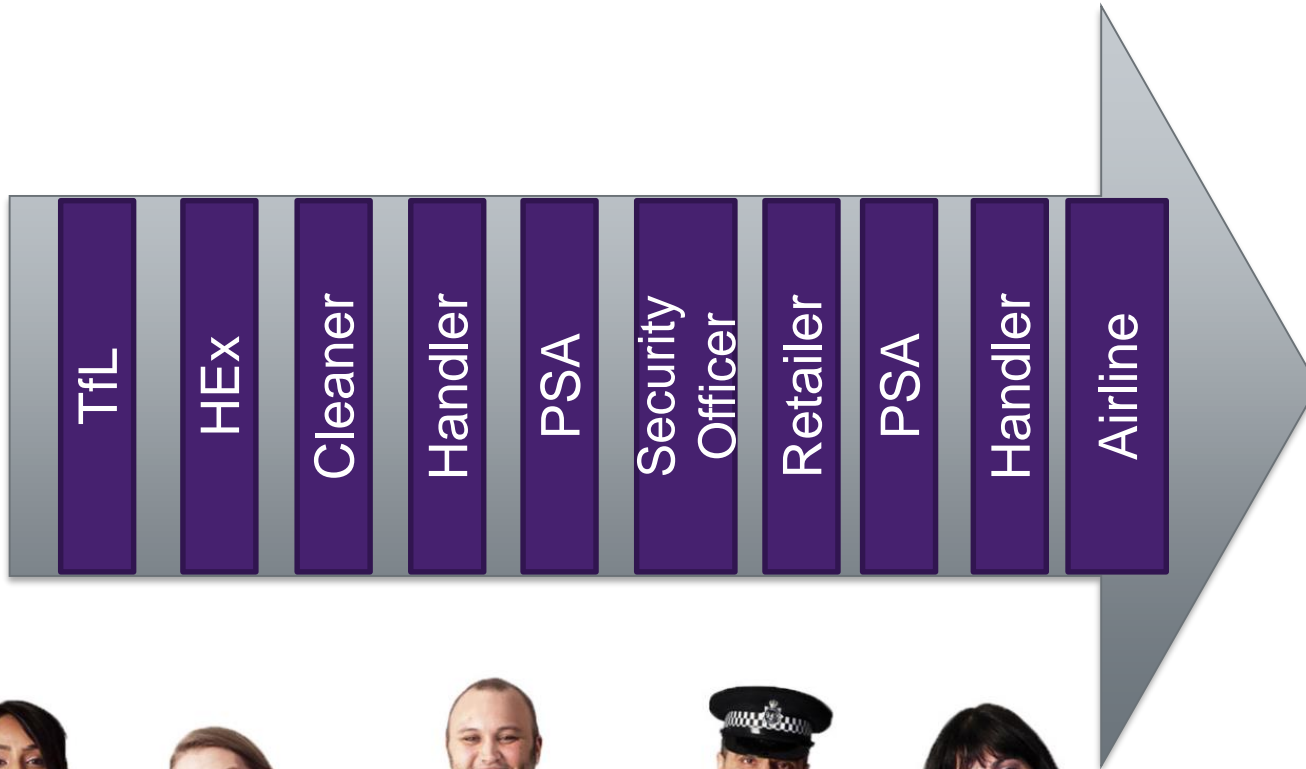
Insight:

Passengers need to be able to understand and compare different travel options to and from Heathrow.

Opportunity:

Introduce a tool to help passengers plan their journey to and from Heathrow.

Working with a better coordinated Team Heathrow



Heathrow
Making every journey better

Visit us: www.heathrow.com/company/investor-centre

Developing the airport of the future



Seamless, consistent passenger centred service



Maximising digital, self-service and automation



Passenger Choice and Control



Friendly, proactive personal service when required



Excellent customer recovery



Unique and differentiated – done 'the Heathrow way'

Heathrow

Making every journey better