

HEATHROW IN 2018: HEALTHY GROWTH, BETTER SERVICE AND LOWER COST



TOTAL REVENUES
£1,405
MILLION

Strong retail sales, trade and passenger growth

OPERATING COSTS
£557
MILLION

Responsible investments in resilience, security and service

UNDERLYING EARNINGS
£848
MILLION

Growth of 1.6% over H1 2017

TRADE GROWTH

4 NEW CONNECTIONS to China in 2018 helped trade through Heathrow grow **2.2%**



The biggest trading markets for cargo:

NORTH AMERICA
308,207
TONNES

ASIA / PACIFIC
252,312
TONNES



MORE PASSENGERS THAN EVER BEFORE

ALL-TIME HIGH OF PASSENGERS FLYING FROM THE UK'S HUB AIRPORT SO FAR IN 2018



38.1
MILLION
PASSENGERS

+2.5%
from 2017



Passenger numbers boosted by the:



Royal Wedding



Football World Cup



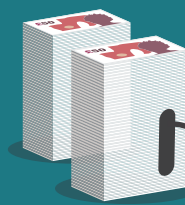
100,000

More domestic passengers



£354
MILLION INVESTED into Heathrow so far in 2018 to improve the passenger experience

HEATHROW GOES ELECTRIC



£6 MILLION INVESTMENT

in electric vehicle charging points – giving Heathrow the densest charging network in Europe

116

ELECTRIC VEHICLE CHARGING POINTS

currently installed across the airport with a further **11** planned for 2018



EXPANSION TAKES OFF



65 UK SITES

bidding to help expand Heathrow through large-scale offsite manufacturing

415 MPS BACKING EXPANSION

An overwhelming political mandate with a majority of **296** MPs



OVER **80** FRESH IDEAS SUBMITTED

to help deliver expansion more innovatively, sustainably and affordably

RETAIL UP

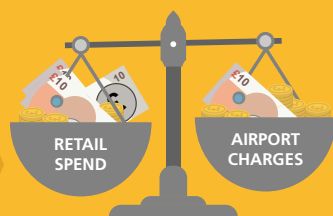
SUMMER GETAWAY PUSHES RETAIL SALES HIGHER

Strong retail growth pushing up financial performance



4.8%
HIGHER

STRONG RETAIL SPEND SUPPORTS LOWER AIRPORT CHARGES



1% DECREASE IN PASSENGER CHARGES

£21.75 average charge in 2018

WHAT ARE PASSENGERS BUYING IN 2018?



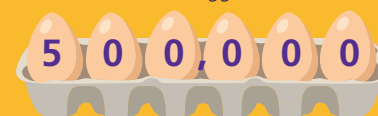
700+ PAIRS OF SUNGLASSES sold each day so far this year



50,000 SOLD The most popular souvenir purchase is the London red bus fridge magnet

HUNGRIER PASSENGERS IN 2018...

Half a million more eggs sold across Heathrow



60,864 more burgers sold in the first half of 2018 vs 2017

10 TONNES OF EXTRA BEEF SOLD!

50,000L

more orange juice guzzled in 2018 compared to 2017



That's **625** baths filled with juice!