

HEATHROW FLIES HIGH IN 2018 WITH STRONG GROWTH, EXCELLENT SERVICE AND LOWER COSTS

Heathrow

TOTAL REVENUES GROWING

£2.97
BILLION

Strong passenger growth and retail sales push revenue up 3%

OPERATING COSTS STABLE

£1.13bn
BILLION

Responsible investments in safety, security and resilience

GROWING UNDERLYING EARNINGS

£1.84
BILLION

INVESTMENT OVER **£665** MILLION

spent on improving the airport experience for passengers

EXPANSION

Preferred plan taking shape:



Public consultation set for June 2019

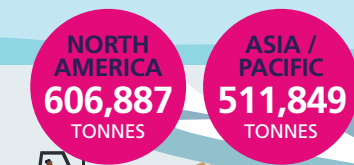
650 ground investigations at sites around the airport completed



415 MPs back expansion. An overwhelming political mandate – a majority of 296 MPs

TRADE GROWTH

Nearly 1.7 million tonnes of trade flowing through Heathrow



MORE PASSENGERS THAN EVER BEFORE

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



80.1
MILLION PASSENGERS

+2.7% from 2017

220,000
passengers a day. (on average)



OVER **1,300** FLIGHTS PER DAY

Only airport in the world with this many flights on only two runways

FLIGHT GROWTH



2.2%
SHORT HAUL



3.1%
LONG HAUL

NEW ROUTES

THE UK'S FIRST NON-STOP SERVICE TO AUSTRALIA

With the launch of the Qantas Perth service in 2018



6 NEW CHINA ROUTES FROM HEATHROW

the UK's only hub airport and primary gateway to China.



NEW DIRECT FLIGHT TO PITTSBURGH, US IN 2019



DOMESTIC CONNECTIONS GROW TO 9

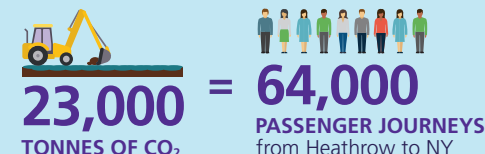
New services to Newquay set to begin in April 2019



CARBON NEUTRAL GROWTH ROADMAP

New plans to help deliver carbon neutral growth from expanded Heathrow – including a £1m prize for the first electric commercial flight to operate at the airport

Heathrow launched the first in a series of peatland restoration projects. Over 30 years, the site will offset:



T2 is one of the first terminals in the world to be powered by 100% renewable energy



RETAIL UP

Retail revenue increased to:

STRONG TRAFFIC PERFORMANCE AND NEW DIGITAL CAPABILITIES LEAD TO HIGH RETAIL SALES



8.6%
HIGHER

£716m

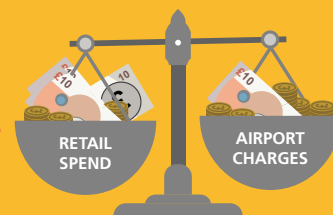
Retail revenue per passenger:



5.8%
HIGHER

£8.94
(2017: £8.45)

STRONG RETAIL SPEND SUPPORTS LOWER AIRPORT CHARGES



1%
DECREASE IN PASSENGER CHARGES

£21.78 average charge in 2018 (2017: £22.00)

HUNGRY PASSENGERS IN 2018...

Half of all departing passengers ate at Heathrow



12 tonnes SMOKED SALMON

Across restaurants and shops at Heathrow



PASSENGERS LOOKING SMART...

1 Swiss Watch sold every 15 minutes at Heathrow



OVER **10 miles**



The distance all ties sold in 2018 would stretch in a line (From Heathrow to Chelsea's football Stadium in London).