

Heathrow's Approach to Enhancing and Improving Passenger Accessibility



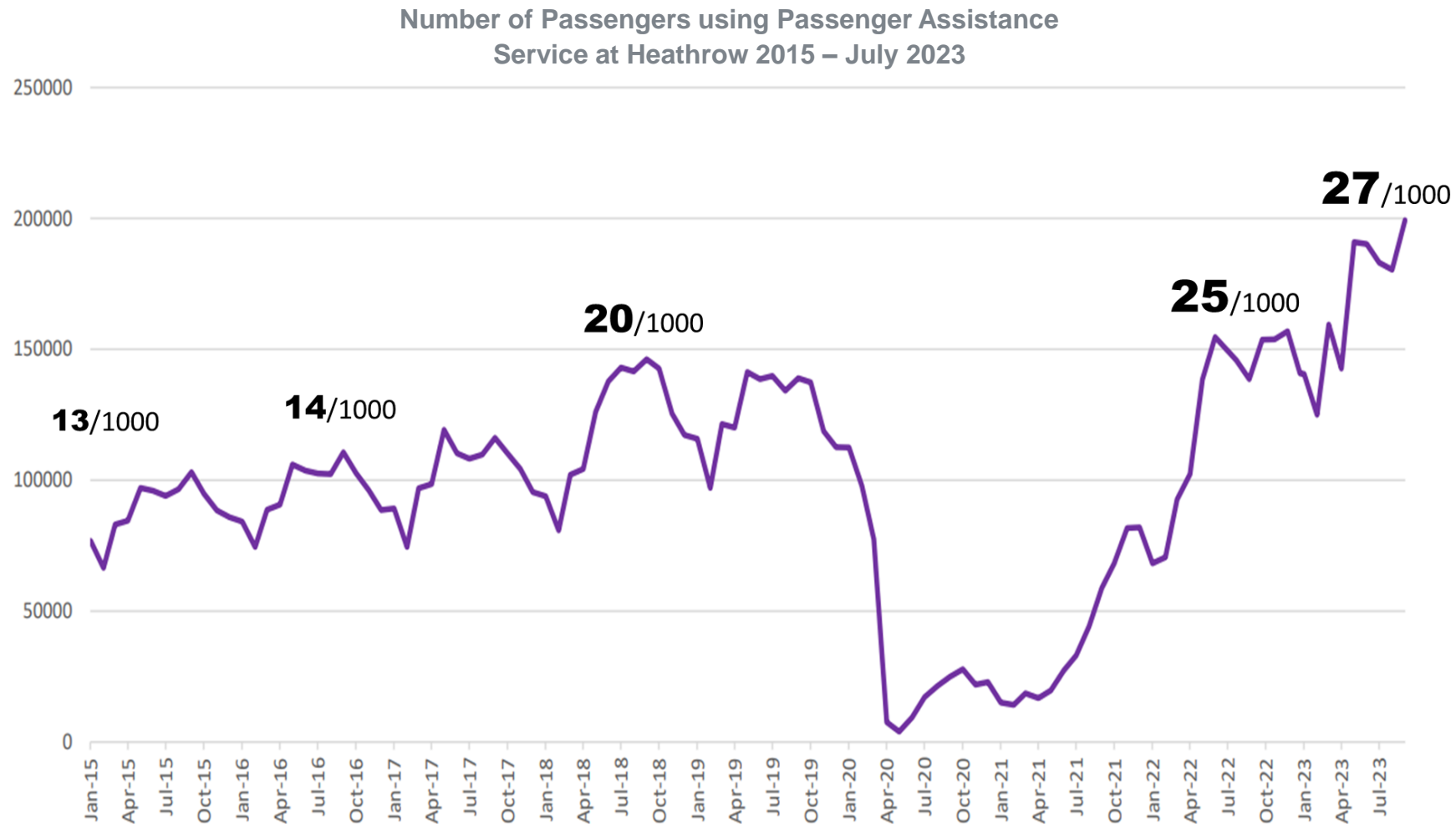
Every passenger is unique, but every passenger takes a similar journey when at the airport

- In year to September 2023, Heathrow handled 76.8m passenger journeys
- Passengers came from over 150 different countries around the world
- 37% of passengers were British
 - 21% European
 - 22% North American
 - 10% Asian
 - 10% come from the rest of the world
- 24% of passengers were connecting through the Airport

- 46% of passengers only made one trip through Heathrow
 - 10% of passengers made 7 or more trips
- 27% travelled on business
- 73% travelled on leisure
 - 31% visiting family and friends
- 53% are men
- 55% of passengers fly long haul
 - North America 25%
 - Africa and Middle East 14%
 - Asia / Australasia 12%



The number of passengers requesting assistance with their journey through Heathrow has accelerated following the Covid pandemic



In 2019...

39% of customers

on any given day, have one or more personal circumstances which the airport needs to consider when designing inclusive services

(based on in-airport survey data)



These customers fall into five broad categories (with many falling into multiple) and they are twice as likely to feel frustrated, distressed, disappointed, angry or patronised while in the airport. Meaning that they are less likely to be satisfied with their airport experience



e.g. Hearing issues
Poor Balance,



e.g. Mobility issues
Breathing difficulties



e.g. Autism / ADHD
Dyslexia



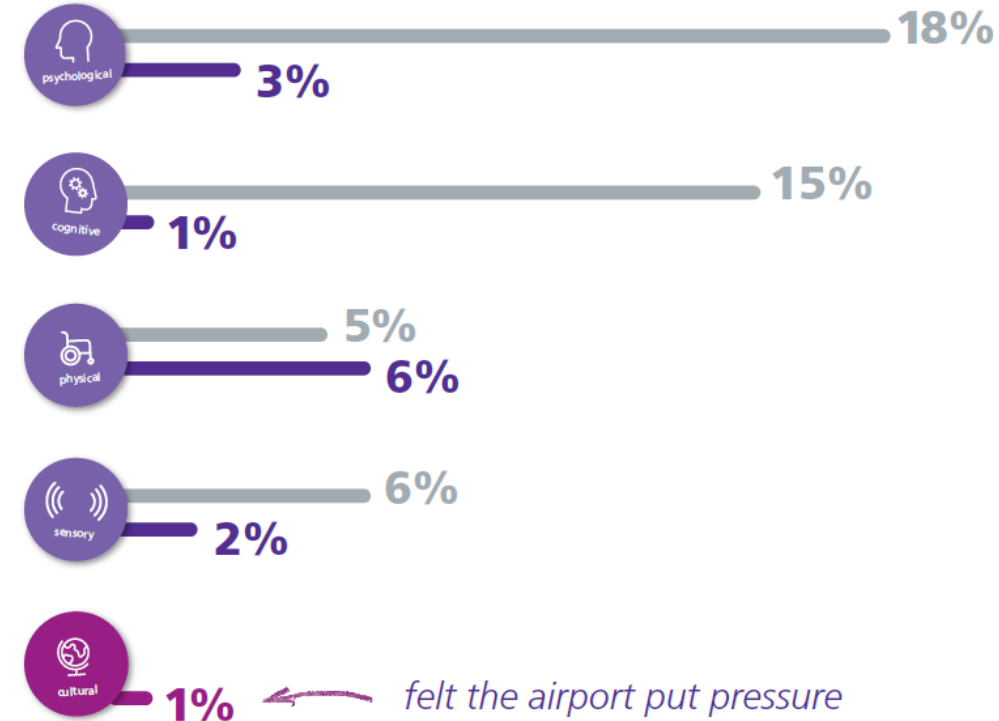
e.g. Anxiety / stress
Abnormal sleep



e.g. Modesty
Dietary needs

On any given day...

— Temporary
— Permanent



← felt the airport put pressure on their cultural needs

These customers are twice as likely to feel **frustrated, distressed, disappointed, angry or patronised** while in the airport

To improve future experiences 3 high level needs were identified, capturing what matters most to passengers

To trust

Customers need to be able to trust that they will be supported and able to navigate the airport easily

To choose

Customers need be able to make their own decisions about their time in the airport

To enjoy

Customers need to feel their time in the airport is well spent rather than time wasted

Heathrow plans to concentrate on giving better experience for PRS passengers by:

Content Redacted

More than 25% of the population in most of Heathrow's key markets will be over 60 by 2030, meaning that it is important that we design an airport experience that enables them to continue traveling from Heathrow in the future.

% of total population aged over 60 in top Heathrow passenger markets

	1980	2015	2030	2050
Australia	12%	20%	25%	28%
Canada	12%	22%	29%	32%
China	7%	15%	25%	36%
France	14%	25%	30%	32%
Germany	17%	28%	36%	39%
India	5%	9%	12%	19%
Ireland	13%	18%	24%	31%
Italy	15%	29%	37%	41%
Japan	11%	33%	37%	42%
S E Asia	5%	9%	15%	21%
South Korea	6%	19%	31%	42%
Sweden	19%	26%	29%	30%
UK	17%	23%	28%	31%
USA	14%	21%	26%	28%
World	8%	12%	16%	22%



"We felt like we were being rushed through the airport and not given time to organise all our paperwork. People forget that many travellers don't know what to do or can't move quickly."



"Struggles to read info boards and staff don't seem to take him seriously."



"became separated from her husband in arrivals for over an hour which caused her to become more and more anxious."