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Industry Insiders Slam Heathrow - Ascend Survey Ranks Airport as Worst of Globe's Major Hubs

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Bottom of the league. That's the damning verdict from aviation industry insiders, who in a major survey have put Heathrow in last place when asked to rank 10 of the globe's biggest airports.

They scored Heathrow lower than its principal competitors in Europe: Charles de Gaulle, Schiphol and Frankfurt. Respondents placed it lower than Gatwick, Singapore, Dubai and Hong Kong; they even considered Heathrow to be worse than Los Angeles and JFK airports.

The survey by aviation consultant Ascend brings the much maligned airport's difficulties into sharp focus. More than 500 industry figures took part: from aviation analysts to senior management at airlines, manufacturers, suppliers and investment banks, half from outside the UK and many frequent travellers through London's flagship

airport. They pinpoint Heathrow's security processes and walking times as its biggest problems.

"Heathrow's reputation, not only amongst consumers but also in the industry, really is in tatters," says Peter Morris, chief economist, Ascend. "For Heathrow to score so poorly against its peer group of international hub airports is simply embarrassing for BAA. It all comes down to customer experience, and the survey tells us Heathrow just doesn't deliver. Other airports have dealt with similar issues more effectively, but for BAA the motivation to invest in improvements in some of its core problem areas is not clear. So the misery of long queues, long waiting times and long walks isn't going to get better any time soon."

The silver lining for BAA is that Heathrow did score reasonably well in Ascend's survey for its accessibility, food and drink facilities, and retail and business lounges. "However, high marks here are no surprise," continues Morris. "Restaurants, lounges and duty free shopping are highly profitable for BAA and attract investment. Without a different regulatory framework that encourages BAA to consider customer experience beyond simply meeting targets for processing people through the airport or where profits are at stake, service standards at Heathrow are unlikely to get much better."

A lack of optimism about Heathrow's future also comes though clearly in the survey's results. Asked to predict changes to the level of service at the airport for the five years after Terminal 5 opens, around half of respondents thought there would be a slight improvement, and over one third indicated they expected service levels to stay the same or get worse.

Problems not terminal

However, as bad as Heathrow's problems may be, experts say the rest of the transport sector faces and surmounts similar challenges everyday. Not only do other key services cope with capacity pressures but they are handling increasing passenger numbers without a perpetual sense of crisis or major investment in new infrastructure.

"It's about understanding what you've got and then making the best of it," says Kevin Mannion, CEO at Legion, specialists in advanced crowd management.

"Heathrow can take lessons from its peers in other parts of the transport sector," he continues. "For example, for years legacy metro

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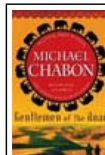


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systems all over the world have been running at or over capacity, but they have learnt how to adapt and make the most of their existing infrastructure. When the first underground lines were dug in London planners could not have imagined then the numbers of people that would travel on them today. But millions do travel each day and for the most part, it's still a smooth ride."

Mannion speaks from the experience of Legion's work with transport infrastructure owners including Transport for London and the Spanish airport operator AENA, to plan and optimise the use of often limited space.

"Clearly there is no quick fix for Heathrow or any other airport," Mannion says. "But more and more operators are waking up to importance of working to improve customer experience in the short term. There may be little direct financial benefit to invest, but as the retail sector can attest, happy customers make for happy shoppers. BAA should consider that long queues and security hold-ups caused by poor layout and operations leave their potential shoppers rushing for flights rather than feeding the golden retail goose."

For further information and to speak to Ascend and Legion contact Kieran Miles Kieran@tannissanmae.com or Nancy Prendergast nancy@tannissanmae.com at Tannissan Mae Communications on +44 (0) 20 7243 4440.

Notes for editors

Ascend conducted the survey of aviation industry professionals between 17 and 31 October 2007. There were 563 respondents. -0- *T Average airport satisfaction score (out of 10) Heathrow 4.4 Los Angeles 5.3 New York JFK 5.3 Gatwick 5.5 Charles de Gaulle 5.6 Frankfurt 6.5 Schiphol 7.1 Dubai 7.6 Hong Kong 7.9 Singapore 8.3 *T -0- *T Average rating for services at LHR (1=poor, 5=excellent) Security processes 2.3 Walking time through the airport 2.3 Overall ambience of the airport 2.5 Connecting between flights at Heathrow 2.5 Baggage handling 2.5 Delays to flights and connections 2.5 Check-in time 2.7 Customs and immigration 2.8 Signage and information 3.0 Retail shops and prices 3.0 Food and drink availability 3.2 Accessibility by road and rail 3.3 Business lounges 3.4 *T -0- *T What will happen to the level of service at Heathrow in the five years after Terminal 5 opens? Service will get much better 19% Service will improve slightly 47% There will be no overall change in service 26% Service will get worse 7% Service will get much worse 1% *T

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