

Report
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H8 Consumer Research Review

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Glossary of key terms

ACI	Airports Council International
AIS	Advanced Information System
AMS	Amsterdam Schiphol Airport
ASQ	Airport Service Quality
BP	Business Plan
BRU	Brussels Airport - Zaventem
c.	Circa
CAA	Civil Aviation Authority
CAGR	Compound annual growth rate
CCB	Consumer Challenge Board
CCRA	Climate Change Risk Assessment
CDG	Paris Charles De Gaulle Airport
COVID-19	Coronavirus disease
Consumers	Present & future passengers and cargo owners, as defined by HAL
Customers	Airlines, as defined by HAL
D&R	Drop and ride
DTC	Digital travel credentials
EEA	European Economic Area
EMA	East Midlands Airport
FRA	Frankfurt Airport
FX	Foreign exchange (currency)
Gen Z	Persons born 1997-2012
H7	Price control period: 2022-26
H8	Price control period: 2027-31
HAL	Heathrow Airport Limited
HPF	Heathrow Passenger Forum
IAG	International Airlines Group
IATA	International Air Transport Association
IDL	International Departures Lounge
km	Kilometre
LGW	London Gatwick Airport
LHR	London Heathrow Airport
m	Metre
MAD	Madrid Barajas Airport
MAN	Manchester Airport
mi	Miles
MTI	Measures, Targets and Incentives
OBR	Outcome based regulation
ONS	Office for National Statistics

PA	Passenger assist
p.a.	Per annum
PAS	Passenger Assistance Services
PAX	Passengers
PCA	Pre Conditioned Air
PRM	Passengers with restricted mobility
PRS	Passengers requiring support
Q	Quarter
QSM	Quality of Service Monitor
RAB	Regulatory Asset Base
RP	Revealed Preference
SP	Stated Preference
STN	London Stansted Airport
T	Terminal
TTS	Terminal Transit System
UK	United Kingdom
US	United States
WTP	Willingness to Pay

1 Overview

Introduction

- 1.1 Heathrow Airport Limited (HAL) is required to present a Business Plan to the Civil Aviation Authority (CAA) for the H8 price control period. In its Method Statement and Business Plan Guidance¹, the CAA stated that HAL is expected to:
- carry out its own research and engagement with consumers, local community groups and other stakeholders;
 - demonstrate a clear “*line of sight*” as to how it has taken consumer priorities into account in the development of its business plan; and
 - consult with [the CAA] and stakeholders on its plans for new consumer research and engagement, to allow for appropriate input.
- 1.2 The definition of airport ‘consumers’ in the context of this work includes current and future passengers and cargo owners².
- 1.3 The H8 price control process assumes that Heathrow continues to operate in a business-as-usual mode as a two-runway airport.

Scope of work

- 1.4 The CAA commissioned Steer as an independent consultancy with expertise across market research and price control regulation in aviation.
- 1.5 Our role has been to review the:
- **available body of consumer research**, both compiled by HAL and more widely available, to assess its completeness and robustness, and identify key themes and trends; and
 - **use and interpretation of consumer research by HAL within the Business Plan**, commenting on whether consumer views have been fully accounted for.

¹ Source: CAA method statement and business plan guidance (section 1.28), available at <https://www.caa.co.uk/media/21hppyj/cap3083-h8-method-statement-and-business-planning-guidance.pdf>

² Whilst consumers of airport services, cargo owners are not exposed directly to airport processing operations, but cargo partners (i.e. shippers and forwarders) act on their behalf. For the purposes of research, it is cargo partners who are able to provide a more informed view of their airport priorities.

The consumer body of evidence

- 1.6 Insights from consumers are expected to directly inform HAL's decisions for the consumer outcomes³ it is aiming to deliver. The body of evidence includes research compiled and conducted by HAL, as well as material from the wider industry (including from the CAA's own research programme, IATA, ACI, and ONS). Both sets have been included in our review.
- 1.7 Given the expected use of consumer insights, the quality of the underlying research is critical. Methodological weaknesses, sampling limitations, or inconsistencies across sources could lead to an inappropriate prioritisation of initiatives and choices within the Business Plan. We have therefore assessed the **completeness and robustness** of the research (particularly that commissioned by HAL), focusing on any evidence considerations or perceived gaps – whether due to insufficient sample sizes, incomplete or unexpected methodologies, limited evidence, or missing insights for specific areas or passenger segments.
- 1.8 Key themes, trends and insights were then triangulated across the research allowing for an understanding of consumers' common priorities and preferences. We note that the available research spans topics that are pertinent to H8 and to Heathrow's overall business. Both have been identified in the review, with those of importance to H8 flagged and thus expected to be reflected in the initiatives and outcomes to be achieved in HAL's H8 Business Plan.

How has the consumer research been used in identifying priorities?

- 1.9 Drawing on the assessment of the consumer body of evidence, we then review how this evidence has been used in the H8 Business Plan.
- 1.10 The focus has been on the extent to which the priorities in the Business Plan are reflective of the body of evidence, and with specific consideration of the Measures, Targets and Incentives (MTIs). In particular, we have considered the volume and interpretation of evidence contributing to the priorities, initiatives and objectives described in the plan.

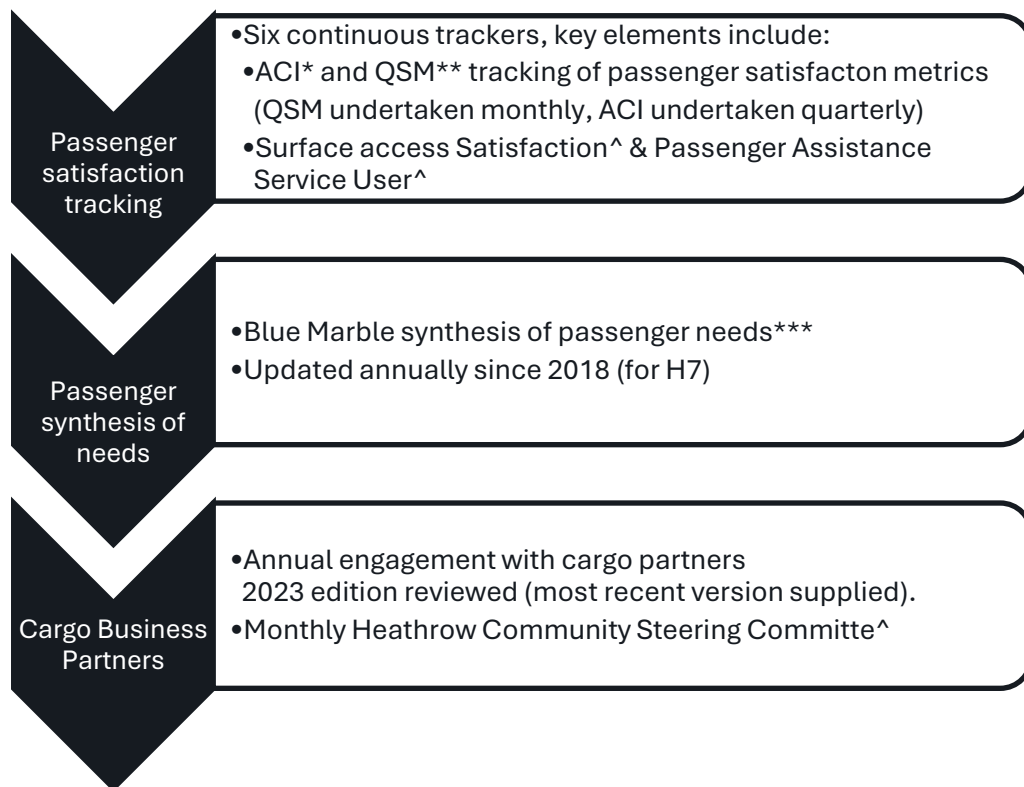
HAL's approach to research

- 1.11 HAL has a programme of continuous and ad-hoc engagement with consumer groups underpinned by the three key elements (see Figure 1.1).
- 1.12 Additionally, HAL tracks customer compliments and complaints data and feedback/comments provided via social media and web reviews⁴.

³ This specifically refers to the six Consumer Outcomes identified for H7 that HAL propose to maintain.

⁴ Information from these indirect data sources has not been reviewed as part of this commission.

Figure 1.1: HAL process of tracking consumer needs



Source: Steer 2025-26

Note [*]: ACI = Airports Council International, ACI ASQ Quality of Service 2025

[**] QSM = Quality of Service Monitor.

[***] Synthesis of Consumer Insights – Need Areas, Stages 1-5 (extended), Blue Marble Research, July 2025

[^] not reviewed as part of this commission.

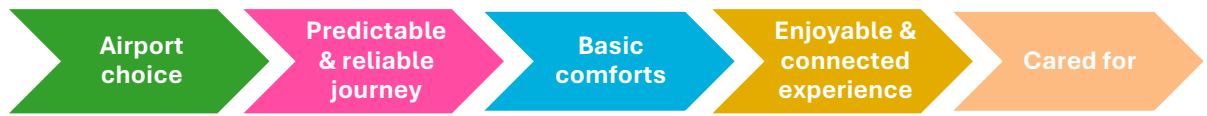
- 1.13 Across its consumer engagement, HAL states that passengers and cargo partners are accounted for independently, as two separate ‘pillars’. We note, however, that the cargo sector evidence appears less well-developed compared to identified passenger needs. In comparison, the HAL-commissioned research with passengers speaks to a wide range of topics at operational and strategic levels.

Consumer needs and outcomes

- 1.14 Embedded within the **passenger** engagement is the needs framework (see Figure 1.2). This has been retained from the previous H7 period and reconfirmed as part of the H8 programme⁵. It considers five categories of needs that overarch the touchpoints of the airport journey.

⁵ The ‘Synthesis of Consumer Insights – Need Areas, Stages 1-5 (extended)’, undertaken for HAL by Blue Marble Research and published July 2025, is used to reconfirm the needs framework. This constitutes the fifth update of the ‘Synthesis’ which was first undertaken in preparation for H7.

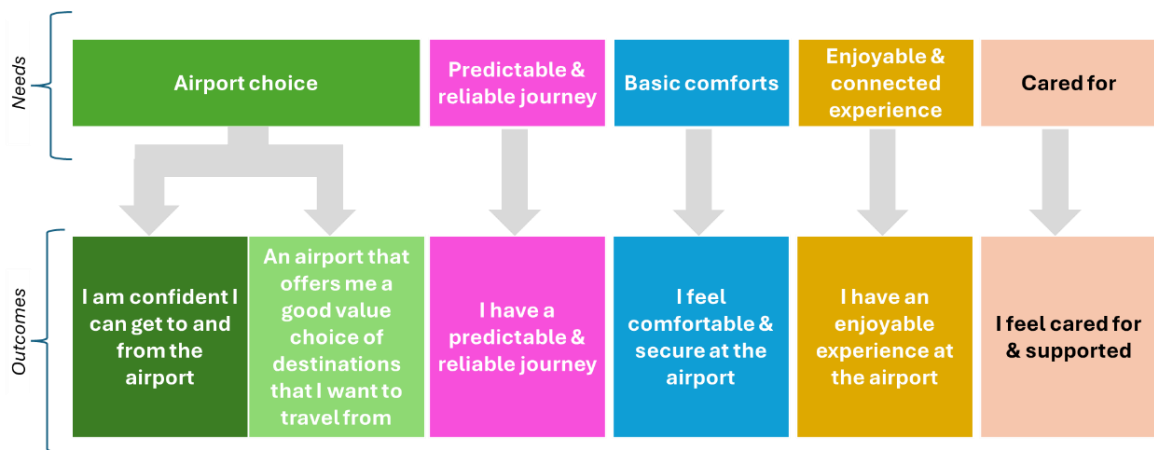
Figure 1.2: HAL Passenger needs



Source: HAL Business Plan, Chapter 3 Page 55

1.15 These five needs, in turn, are mapped by HAL to six consumer outcomes, where airport choice is sub-divided into two outcomes as shown in Figure 1.3. The six outcomes have again been retained from H7 and reviewed by HAL via the Blue Marble Research Synthesis of passenger needs (see Figure 1.1) for the purpose of H8.

Figure 1.3: HAL’s 5 consumer needs and their relationship with its 6 consumer outcomes



Source: Steer 2025-26, HAL Business Plan page 79

Principles of engagement

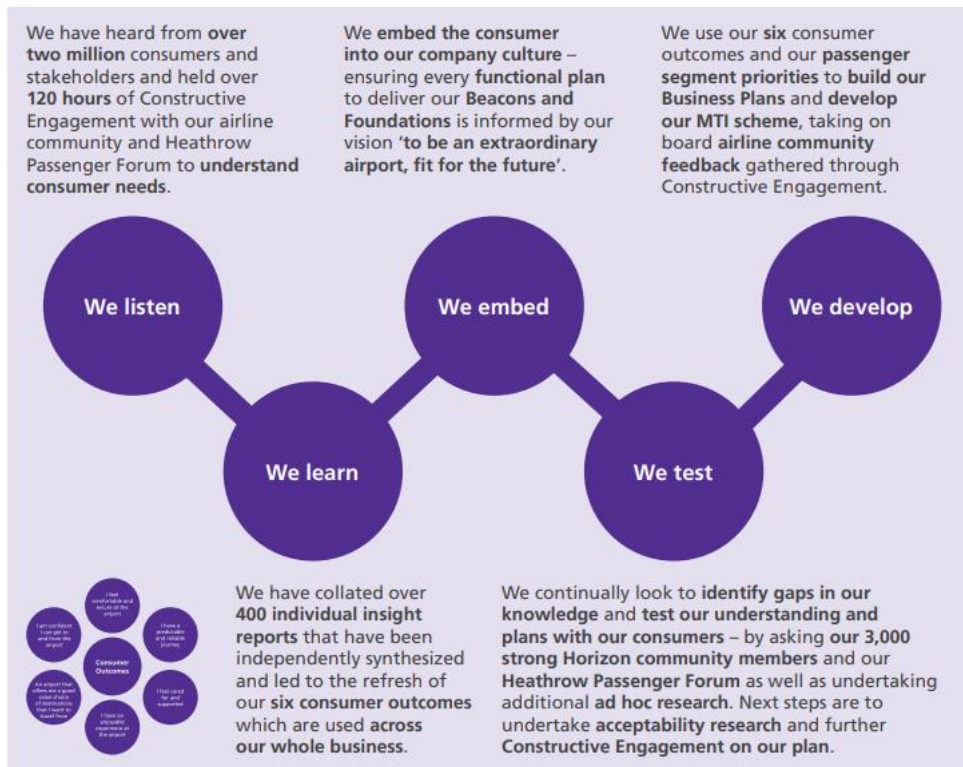
1.16 The evolution of passenger needs is treated as continuum from the understanding developed for previous price control periods, particularly H7. Consumer research is, therefore, not undertaken solely in the run-up to a new price control period or to support the production of the accompanying Business Plan. Rather, it is part of the airport’s business-as-usual activities, with HAL describing consumer research as being embedded within its culture across all processes and decision stage gates.

1.17 Figure 1.4 shows HAL’s five principles of consumer engagement for passengers.

- **We listen:** what are passengers and stakeholders saying and which sources of insight are most useful for this topic?
- **We learn:** taking the insights together, what can be learned about views and behaviours and is this shifting over time?
- **We embed:** how can insights be used to develop strategies and what is the desired outcome in terms of how the consumer experience might improve?

- **We test:** how can the strategy and/or initiative be tested with consumers? How should the plan be modified on the basis of the testing?
- **We develop:** how is success measured and how to ensure that the strategy continues to be passenger-focussed?

Figure 1.4: HAL approach to consumer engagement



Source: HAL H8 Business Plan, Figure 18, page 48

- 1.18 The overall programme of research has been undertaken alongside **Constructive Engagement (CE)** with airlines and the Heathrow Passenger Forum (HPF)⁶.

Ad-hoc research

- 1.19 Across the semi-continuous activities (as shown in Figure 1.1) HAL identifies gaps in the research and then commissions **ad-hoc survey and research programmes** to address these. Gaps are identified as either knowledge blind-spots (where the existing evidence needs greater depth or is otherwise perceived as weak or non-existent) or trending topics (such as attitudes towards the environment and sustainability).

⁶ The Heathrow Passenger Forum (HPF) is a group within the broader community consultation framework for the airport known as the Council for the Independent Scrutiny of Heathrow Airport (CISHA). A dedicated sub-committee of the HPF was engaged by HAL to provide review and challenge on business plan development during Constructive Engagement.

1.20 Target areas for ‘deep dives’, via the ad-hoc programme, are identified by HAL when:

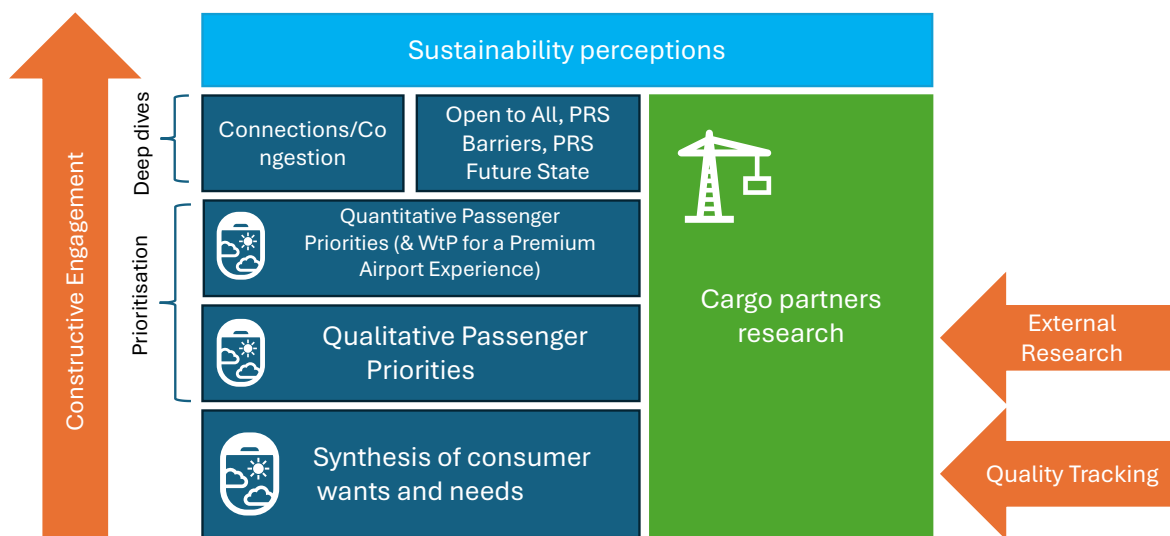
- Satisfaction metrics with a particular segment are declining;
- Satisfaction metrics with a particular segment are falling below those at other European comparator airports (Amsterdam, Madrid, Frankfurt, Paris Charles de Gaulle etc.); or
- Passenger volumes for a particular segment are trending lower (in decline or stagnating in comparison).

1.21 A key ad-hoc study in HAL’s research is the 2025 Qualitative Passenger Priorities Research⁷. Using insights from the Synthesis of needs, this research is used to identify key priorities and opportunities relating to the passenger experience⁸ across all passenger profiles, service areas and terminals. The qualitative research is followed by HAL-commissioned quantitative research (to support with the prioritisation of activities).

Summary of key HAL research

1.22 The build-up and interaction of the various components of research used by HAL is shown in Figure 1.5.

Figure 1.5: Build-up of HAL consumer research



Source: Steer 2025-26

⁷ Heathrow Passenger Priorities, Blue Marble, March 2025.

⁸ HAL also use their regular QSM tracking of passenger experience and service level, and external sources such as the IATA Global Passenger Survey and CAA Consumer Survey to identify priorities for H8.

This document

1.23 This document summarises the work undertaken and the key points for the CAA to consider in developing its H8 proposals. The remainder of this document is structured as follows:

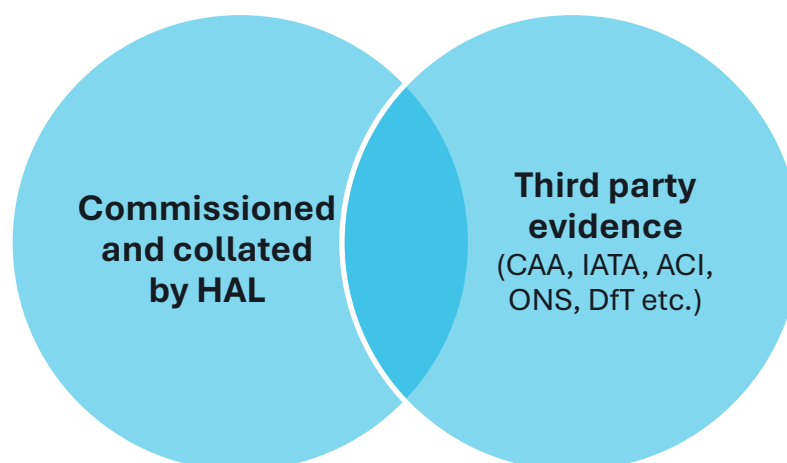
- Review of the evidence base; the completeness and robustness of HAL's evidence base and key themes from the wider industry literature.
- Review of the use and interpretation of consumer research by HAL in the Business Plan; the line of sight from the research to the consumer priorities in the Business Plan, including the link to MTIs and service quality.

2 Review of the evidence base

Introduction

- 2.1 The review of consumer evidence has considered two main sources: the research commissioned and collated by HAL and third-party information (see Figure 2.1). We note that there is a degree of overlap – particularly given HAL’s Synthesis of research⁹ which contains studies undertaken by key industry players including the CAA, IATA and ACI.

Figure 2.1: Research reviewed



- 2.2 Overall, our review took account of close to 50 documents and studies. It covered information received as of 17 October 2025 and considered the methodologies used in the research, the completeness and robustness of the evidence presented, as well as the findings (i.e. the themes and trends that emerge from the evidence).
- 2.3 A list of all the documents and studies reviewed is provided in Appendix A.
- 2.4 The research reviewed provides insights into both the factors that influence the H8 price control and the trends that might impact HAL’s business more generally. Where possible we have indicated the area’s most pertinent to H8 and where we might expect to see the Business Plan reflecting particular priorities.

⁹ Synthesis of Consumer Insights – Need Areas, Full report Stages 1-5 (extended), Blue Marble Research, July 2025.

Notable challenges

- 2.5 A particular challenge for this commission (which required the drawing of insights across a *portfolio* of research) was accounting for the different methodologies used and resulting sample dynamics and/or biases that can ensue. We provide further discussion on this in Appendix B.
- 2.6 Noting the inevitable constraints and challenges in capturing a diverse set of voices and views when undertaking any research; we acknowledge that HAL has made efforts to develop broad and representative insights. Further, HAL's research has generally been found to be robust and conducted in line with good market research principles.
- 2.7 There are, of course, always areas where more or larger samples from a particular segment might provide additional confidence – however, whether this would change the underlying narrative or identification of priorities is less certain. We note the following observations and limitations with respect to the HAL research that should be accounted for when using the evidence to inform decisions:
- The **absence of relevant sample tabulations or detailed methodologies** for review in some studies (for example the *Open To All* research).
 - An apparent **absence of prioritisation of needs** in more qualitative studies (for example the Heathrow Central Terminal Area Development study and the Cargo Partners Research).
 - A **lack of clarity around the practical outcomes of monetary valuations and relative priorities** attached to specific services and areas of investment (for example in the H8 Quantitative Priorities study).
 - **Inconsistent sampling rates across different terminals** and/or focus on some terminals over and above others within individual studies (for example, the relative absence of consumer research covering T4 in the Blue Marble Synthesis¹⁰). Whilst the sample sizes across terminals might be expected to differ given their relative sizes, a minimum sample size is required to provide confidence in any terminal-specific insights.
 - The **age of the research varies**. In particular, the Blue Marble Synthesis of research is a compendium of studies since 2004 (average year of the research is 2019) and the PRS-focused Open to All research is from 2021 with some more recent updates.
 - Given HAL states that it considers H8 to be an extension of H7 in how consumer insights are gathered and argues that the same key drivers and factors identified in H7 continue to be relevant, the Synthesis of research on its own does not deliver insights around priorities for investment in the upcoming H8 period.
 - The *Open to All* research may have pandemic-related impacts compounded within the attitudes and preferences captured. Given the projections for the continued growth in the share of passengers with

¹⁰ Synthesis of Consumer Insights – Need Areas, Full report Stages 1-5 (extended), Blue Marble Research, July 2025

personal circumstances that affect their travel behaviour and who need support, it is important that the requirements of this segment are understood. We note that the *Barriers Research* appears to be a more recent verification of the relative priorities of those requiring additional support, however, there is some ambiguity around when the work was undertaken from the material we have reviewed.

- 2.8 Further, HAL does not always use the five needs throughout its research and the Business Plan. This results in the line of sight across the research and through the Business Plan being less clear than it otherwise might be.

Key themes from the research

HAL research

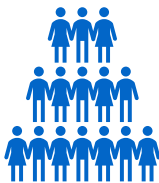
- 2.9 **Six key themes** from the HAL consumer research have been identified in our review. These are shown below (in no particular order). These themes have been identified either by virtue of their recurrence in the research and commonality across all consumers, or by their importance for a significant subset of consumers.

Figure 2.2: Key themes from the HAL research



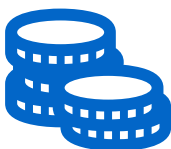
PRS/PRM and accessibility

The volume of PRS has increased throughout H7 and is expected to continue to increase during the H8 period. The HAL Passenger Priorities research highlights that a **lack of support for those with additional needs is a key stress point** at Heathrow currently and is a priority for consumers. The needs of PRS/PRM are therefore expected to become an increasing priority for HAL and would be expected to be a key consideration within the Business Plan.



Terminal congestion and queuing

As emphasised in the Qualitative and Quantitative Priorities Research, **congestion, crowding and queuing are key stress points** for passengers and therefore investment to reduce these would be expected to be an emphasis in the HAL BP.



Affordability

The affordability of travel has emerged as a theme across multiple pieces of research, many of which have emphasised that **affordability has risen in importance since the COVID-19 pandemic** (for example the Blue Marble Research Synthesis). We understand that HAL's acceptability testing is being conducted in parallel with our review and that this is considering how the proposed H8 passenger charge is seen by consumers in terms of value for money.



Delays and disruption

Across multiple pieces of research, **travel delays emerged as key stress points for passengers**. Although delays are not completely within the control of airports, activity by HAL can, in certain instances, reduce the number and severity of delays.



Baggage reclaim

In multiple pieces of research, waiting times for baggage reclaim were highlighted as a key priority for passengers. Improving **baggage wait times** is consistently one of the highest priorities for passengers.



Cargo

A **lack of satisfaction among stakeholders within the cargo community¹¹** with the current operations and facilities with a strong desire for improvements.

Source: Steer 2025-26

Third party research

- 2.10 Research by the CAA and others plays an important role in understanding priorities and emerging themes for consumers, as well as in providing an independent view of the demographics of the passenger base. It offers a useful means of validating the research conducted by HAL, as well as identifying additional themes that HAL may not have considered. The documents targeted for review were as follows:
1. CAA 2024 Passenger Survey (extracts);
 2. IATA 2024 Global Passenger Survey;
 3. ACI ASQ Quality of Service¹²;
 4. Skytrax Airport Service Quality;
 5. ONS International Passenger Survey;
 6. Airport Dimensions Airport Experience Research;
 7. ACI Europe Survey on the impact of digitisation and automation on the passenger experience; and
 8. ACI's ASQ Global Traveller Survey 2024.
- 2.11 With the exception of the CAA material, this review has necessarily relied on information in the public domain only and covering the calendar year of 2024. **It has not been possible to review the detailed ACI ASQ Quality of Service**

¹¹ Heathrow Cargo Partners Research June 2023, Firebrand. The research covered cargo carriers, forwarders, handlers, hauliers, other stakeholders.

¹² Not reviewed in detail as limited information in public domain. Public information relates to a) the airports included in the top rankings and b) the fact that Heathrow is not a top ranked airport.

reports as these are not public beyond high level findings that include a) the airports in the top rankings and b) the fact that Heathrow is not a top ranked airport.

2.12 We note that the **potential insights generated from these third-party sources may not always be entirely independent and without implicit downstream interests**. Further, some will have greater relevance and applicability than others given the focus of the price review. Key themes emerging from the third-party research should, therefore, be considered in this context. The six key themes identified, which are not necessarily exhaustive, are shown below (in no particular order). Two themes overlap with those identified in the HAL body of research (delays and disruptions, and affordability – see Figure 2.2).

- **Affordability: Reducing the cost and/or improving the affordability of flying** is the top consumer priority for the aviation industry over the coming 12 months (CAA Consumer Survey). This finding is consistent across a range of passenger segments (frequent vs. infrequent travellers, incomes, ages, etc).
- **Airport environment:** According to studies from ACI (ASQ Global Traveller Survey 2024) and KPMG¹³, passengers have an increased appetite for **wellness-focused environments that minimise levels of stress and anxiety** when travelling through airports. Examples include incorporating nature, spas, wellness experiences, and sports facilities.
- **Delays and disruption:** As identified in the CAA Departing Passenger Survey 2023¹⁴ as well as the IATA Global Passenger Survey 2024, passengers identified the key role that reducing exposure to **delays and disruptions** within the airport can play in improving their satisfaction. Particularly at security and when boarding the aircraft.
- **Digital solutions and automation:** To speed up airport processes, consumers are willing to use **digitised solutions** that can improve efficiency, and many passengers' current satisfaction with the use of these solutions (though this is potentially skewed towards younger travellers) is improving. Further, there is greater interest in the use of **automated processes** such as self-check-in and self-service bag drops along with digitised solutions such as remote check-in and pre-clearances (e.g. as stated in the ACI ASQ Global Traveller Survey 2024).
- **Premium services:** Premium services, which include enhanced lounge experiences, faster processes, entertainment, and greater personalisation of the airport experience are all identified in existing research as consumer trends, with **passengers seeking more personalised and engaging journeys** (e.g. as noted in the ACI ASQ Global Traveller Survey 2024). The use of premium services and facilities (such as lounges and fast-track) is one part of

¹³ Beyond duty-free: the future of aviation retail - KPMG Ireland, February 2025, <https://kpmg.com/ie/en/insights/strategy/beyond-duty-free-strategy.html>

¹⁴ This indicates relatively high levels of satisfaction with security at Heathrow (98% satisfied or very satisfied with security screening and 69% queuing ten minutes or less). The 2024 data suggests a decrease in this level of satisfaction (86%) but with those queuing ten minutes at 71%.

this trend, but more broadly passengers are seeking experiences such as tailored loyalty programmes and personal shopping.

- **Sustainability:** Views on sustainability are mixed. The 2024 CAA Consumer Survey indicates that improving the **sustainability of the aviation sector** is considered to be one of the highest priorities. In contrast, the IATA Global Passenger Survey 2024 suggests that where passengers choose flight options for reasons other than cost, the importance of sustainability is lower than speed and convenience. ACI’s ASQ Global Traveller Survey 2024 identified that conscious consumerism among younger travellers is growing, with a stated interest in sustainability initiatives that airports are undertaking.

2.13 We note that these sources are focussed on passenger themes. We have not identified equivalent sources of information for cargo and, in particular, with respect to ‘bellyhold’ operations that are prevalent at Heathrow. From our own experience and desktop research, the key themes for cargo would seem to be:





- Providing sufficient warehouse space.
- Supporting special handling (e.g. refrigeration, secure storage); and
- Providing efficient processes for security checkpoints and screening of contents.

Research considerations: topics and themes

2.14 Several considerations were identified from reviewing the body of research used by HAL and comparing this with consumer research conducted by the CAA and other independent sources. These have been classified into two groups: those more pertinent to H8 (using the H8 relevant icon) and those which may apply to the Heathrow business decisions more generally.


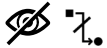



2.15 In particular, and as already noted, there is a lack of cargo-specific research. We have further identified a series of other concerns which we comment on in terms of a) their impact on the robustness of the underlying body of evidence, and b) the potential consequences to HAL’s decision-making process and thus the inherent risks that might be introduced.

2.16 To aid the reader we use the following icons to indicate blind spots, inconsistency, uncertainty, or a limitation to the line of sight.











Blind spot	Inconsistency	Uncertainty	Limited line of sight
			


2.17 Potential risks in some cases may well be mitigated by HAL’s approach to consumer research. Specifically, the fact that it appears to be embedded across a project lifecycle with the impact of investments and initiatives being evaluated after they are introduced. However, we note that the research we have reviewed has a focus on the identification of the need as opposed to the evaluation or success of the outcome.

Table 2.1: Identified considerations in the HAL evidence base

#	Consideration	Issue	Potential impacts	
			Robustness	Consequence
Themes				
1	Relative priorities of cargo community  	The evidence base for stakeholders within the cargo community is weak in comparison to that for passengers. The Heathrow-based cargo community is currently dissatisfied ¹⁵ but there is no information on its relative priorities for improvements.	The absence of information with regards to this group of consumers generates ‘blind spots’.	Any proposed investment by HAL in cargo facilities has limited evidence base and thus any line of sight to the Business Plan would be lacking . Whilst investment would be welcomed by the cargo community there is no certainty around the priorities for its operations.
2	Surface access needs  	Surface access is an important component of the HAL needs framework – albeit not entirely within the control of the airport. The research reviewed focuses on the Central Bus Terminal. The relative priorities of passengers across the spectrum of surface access modes is not well understood at this time.	The extent to which satisfaction with the current surface access options is impacting passenger choice is unclear . Additional HAL research on surface access together with satisfaction tracking was requested from HAL but not received at the time of writing. It remains unclear as to whether this may close this identified concern.	Potentially limits the ability to determine whether there is a case to be made for investment in surface access provision and, if so, for which mode. As such there would be a limited line of sight to any investment in this area set out in the Business Plan . We however note that HAL overall has limited influence over the range of surface access modes.
3	Digitisation of services / processes (also see Table 3.1) 	The body of evidence suggests some conflicting views on the introduction of additional digitisation and automated processes between passenger groups. Whilst some desire more control, others want additional staff support. Further, the precise ‘solutions’ that passengers might prefer, have not been investigated in the evidence provided.	Whilst this is well covered in the body of research, the tension between the preferences of different consumer groups is not explored in any depth . Neither are the precise solutions that might be implemented in terms of a prioritisation exercise. Further, the ICS willingness-to-pay study has insufficient	A balance is needed between the provision of digital / automated processes and the availability of staff. There is a risk that HAL deploys solutions that are not widely adopted by a significant majority of consumers . We note however that this is an internal business decision for HAL, the detail of

¹⁵ Based on the information in the 2023 Heathrow Cargo Partners Research, conducted by Firebrand for HAL. Whilst we understand that this engagement is undertaken annually, the 2023 reports were the only ones provided.





#	Consideration	Issue	Potential impacts	
			Robustness	Consequence
			sample sizes to enable the preferences of different passengers to be assessed.	which is not a key concern for H8 price control per se.
4	Minimum service levels   	The focus of the passenger priority research (qualitative and quantitative) is on improvements to service levels with some consideration of service degradation. Minimum acceptable levels are not considered.	The absence of any investigation into the minimum service level that might be acceptable constitutes a blind spot in HAL’s understanding of the extent of improvement that might be required across any given aspect of the airport passenger journey.	This may affect the prioritisation of capex initiatives, other service quality initiatives, and/or the approach for the MTI framework.
5	Sustainability perceptions   	The evidence base is somewhat contradictory in terms of relative priority. Passengers state they are concerned with sustainability in the aviation sector and wish to adjust their behaviour to support more sustainable practices. However, the willingness of passengers to pay for these is very low. This has not been synthesised or explained in the research reviewed.	This is a comparatively well-researched area across the body of evidence. However, the apparent contradiction between sources raises doubts around the relative priority of this for consumers at the total level (for both passengers and the cargo community).	It is unclear as to how investments into sustainability for H8 might be aligned in the Business Plan with Heathrow’s commitment to net zero climate change targets by 2050 (which means that HAL will need to make some changes regardless of whether this is a passenger priority at this time or not). Consumer research on sustainability is therefore perhaps not the main driver of decisions in terms of the Heathrow business.
6	Relative importance of airport aesthetics 	The relative importance of (memorable) architecture varies between studies significantly and a consensus view is not clear from the research reviewed.	Airport aesthetics does not feature particularly prominently in the HAL body of research despite being a theme emerging in the broader literature. This is a relative blind spot in terms of any terminal redevelopment plans.	Given the relative lack of evidence in the HAL material, this is not anticipated to be a major factor in HAL’s H8 Business Plan . The detail of this is an internal business decision for HAL and this outside of the H8 considerations per se – unless there was a material capex implication.
Segments				
7	Terminal specific insights / Small sample sizes in T4   	The evidence base across different terminals varies in robustness. Sample rates and thus de minimis sizes are varied, and differences in needs by terminal are not widely identified in the research	There is research across all terminals. However, the quantum for T4 is less than for other terminals. This increases uncertainty around relative priorities for T4 .	Limits the ability to draw terminal-level conclusions on passengers’ priorities and confirm whether these differ across terminals. Any terminal-specific initiatives may therefore lack a complete and robust evidence base.

#	Consideration	Issue	Potential impacts	
			Robustness	Consequence
		reviewed. T4 insights in particular have a weaker body of evidence.		
8	Premium Economy focussed research 	The industry-wide trend for growth in premium economy passenger groups and a desire for premium services is not particularly developed in HAL’s internal research. Preferences (e.g. for personalised, engaging, and entertaining experiences) are compounded with those of other passenger (different) groups.	It remains unclear as to whether premium economy passengers are included within HAL’s definition of “Premium passengers” in its research. Dependent on where this group is considered, HAL may be unsighted on its relative priorities and expectations.	A lack of understanding of the emerging needs of this growth market represents a risk that the planned airport experience for H8 is not aligned with the cabin equivalent. This may have a direct impact on airlines and on the relative importance and prioritisation around the use of airport space for different services (lounges vs. retail or general seating, for example). Airlines are, however, expected to share their insights as part of the capex governance process during the H8 period which should mitigate this risk.

Source: Steer 2025

Other identified issues

2.18 Further to the considerations outlined above, we highlight **three issues**: the relative prioritisation of needs between different passenger segments, family-focused research and international travellers.

<p>Prioritisation of needs by passenger segment</p>  	<p>Issue: The needs of several passenger segments are identified across the research. The prioritisation of passenger segments and allocating space to these needs has not been seen in the evidence – particularly within the context of finite airport space and available financial resources. A rationale for how segments have been prioritised would be informative.</p> <p>Robustness: The relative prioritisation of the needs of specific passenger groups vs. the majority is not covered in the body of evidence – which is a potential blind spot¹⁶. This is except for the prioritisation of services and facilities for PRS/PRM passengers in line with the proposed changes in regulation for this group¹⁷.</p> <p>Consequence: Represents a risk that the airport experience is not aligned with the needs and expectation of different passenger groups and/or that perhaps unintended consequences where one group’s needs are satisfied at the expense of another’s may not be recognised.</p> <p>We note however, that by addressing common themes, it would be expected that benefits would be realised for most passenger groups. Further, insights shared by the airlines (as part of the capex governance process) on the needs of their customer should support the most appropriate allocation of capex.</p>
<p>Family-focussed research</p> 	<p>Issue: Whilst the views of family groups are covered in the Synthesis of research there is no specific deep dive into their relative needs and priorities in the ad-hoc programme of research.</p> <p>Robustness: The views of this group are represented in the general sense (i.e. across the general passenger research) but an understanding of any differentiated preferences or priorities is a potential blind spot.</p> <p>Consequence: It is anticipated that addressing overall passenger priorities (e.g. baggage reclaim, reducing queuing) would impact this group positively and improve satisfaction levels.</p> <p>We, however, flag that HAL has indicated that families are a focus area for H8 due to falling satisfaction levels.</p>
<p>International travellers</p> 	<p>Issue: The range of nationalities covered in HAL’s research is small and appears focused on major markets. Further, the body of research is predominantly derived from those speaking English.</p> <p>Robustness: International markets are difficult to target in practice; however, insights may represent a limited set of views compared to the potential range of international travellers who might use Heathrow.</p> <p>The research includes responses from core markets (Germany, US, China, India). However the Synthesis of research remarks on the variation in the expectation of different international groups (e.g. in the propensity to adopt digital services and share personal data, the retail and F&B services provided in the airport, the airport design and architecture etc).</p> <p>Consequence: The body of research limits the ability to understand how any initiatives might inadvertently positively or negatively affect the perceptions of the inbound international traveller cohort.</p>

¹⁶ However, we note that the H8 Business Plan provides little prioritisation of preferences, initiatives or activities beyond some of the initial research findings regards passenger groups might be impacted (see Table 32 in Chapter 3 of the Business Plan,

<https://www.heathrow.com/content/dam/heathrow/web/common/documents/company/about/economic-regulation/Heathrow-H8-Business-Plan-July25-website.pdf>).

¹⁷ See: <https://www.gov.uk/government/publications/aviation-accessibility-task-and-finish-group-report/aviation-accessibility-task-and-finish-group-report>

Summary

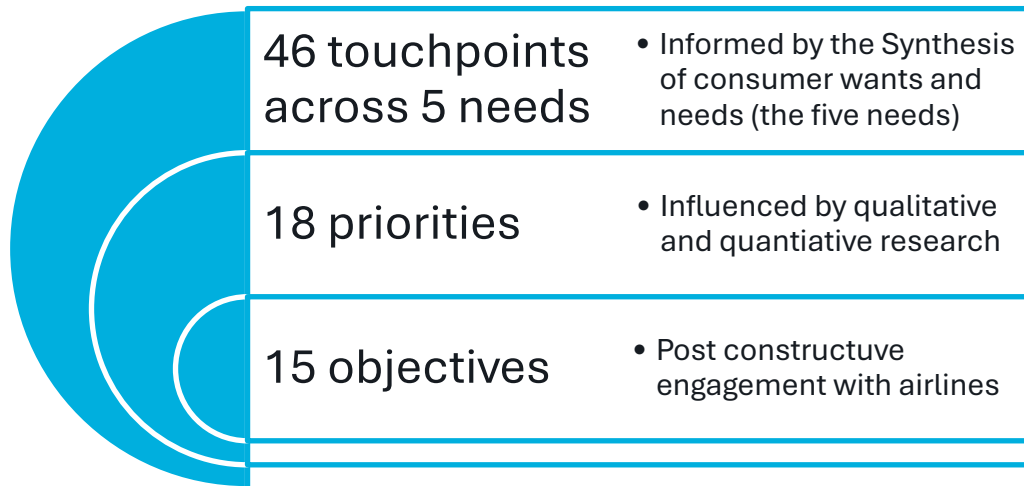
- 2.19 While some issues and concerns have been identified in this review, we conclude that the findings do not materially question the robustness of the evidence base compiled by HAL for the purposes of generating the H8 Business Plan. Rather these serve to highlight areas where uncertainty might exist and as recommendations for subsequent improvements to the overall research base.
- 2.20 There are however two areas where additional research could be beneficial in supporting the understanding of the consumer interest for H8, both of which constitute blind spots in the current body of HAL research. These are:
- The **needs and wants of the cargo community** and its relative priorities for improvements. The evidence is comparatively weak in the materials provided by HAL.
 - The **minimum acceptable service level** from the perspective of consumers. HAL has not provided primary research that tests what consumers view as minimum acceptable service levels. Engaging consumers directly on their minimum expectations and perceptions of performance across key service areas would be beneficial.

3 Review of the use of the consumer evidence

- 3.1 This chapter focuses on our review of the material presented in the H8 Business Plan and its relationship to consumer priorities, as evidenced by the body of research. The commentary predominantly relates to Chapter 3 of the Business Plan unless otherwise stated.
- 3.2 We cover three key points:
1. the link (i.e. the evidence base) to the 18 priorities identified by HAL in Table 34 of the Business Plan;
 2. other consumer priorities or needs that are present in the wider evidence but not necessarily included as a priority in the Business Plan; and
 3. HAL's plans for Measures, Targets and Incentives, as well as service quality initiatives.
- 3.3 In conducting this review, we have sought to understand the link between the key components of the Business Plan and the research that informs them. This is in effect the *line of sight* between the research and the Business Plan and allows for the 'weight' of the evidence underpinning the Business Plan to be assessed.
- 3.4 Our expectations at the outset of this task were that the Business Plan would:
- describe the key consumer priorities from the body of research (in effect, "our consumers told us X"); and
 - indicate how these priorities would be addressed ("HAL will do A and B").
- 3.5 However, the reality has been far more complex – especially given the level of detail, dimensions and nomenclature used by HAL, which has created some challenges. Chapter 3 of the Business Plan aims to describe how consumer priorities are embedded into HAL's initiatives for H8. It describes a series of **46 touch points** across **five passenger needs**. The five needs are a broad and relatively comprehensive framework for the passenger experience, with the 46 touchpoints effectively representing the 'universe' of related activities under each (see Figure 1.2 for the five needs framework).
- 3.6 A subset of these touchpoints have been assessed qualitatively and quantitatively as part of the ad-hoc research commissioned by HAL in order to determine **18 priorities** for the upcoming price control period. These are finally presented as **15 objectives**.

3.7 HAL has made decisions and trade-offs in order to generate the final set of 15 objectives through the process of constructive engagement, amongst other activities. It would, however, be helpful for the Business Plan to be more explicit in this regard – setting out which and how different priorities have been determined, clearly noting what was not being progressed, as well as the areas of focus.

Figure 3.1: Summary of the H8 Business Plan from the consumer perspective



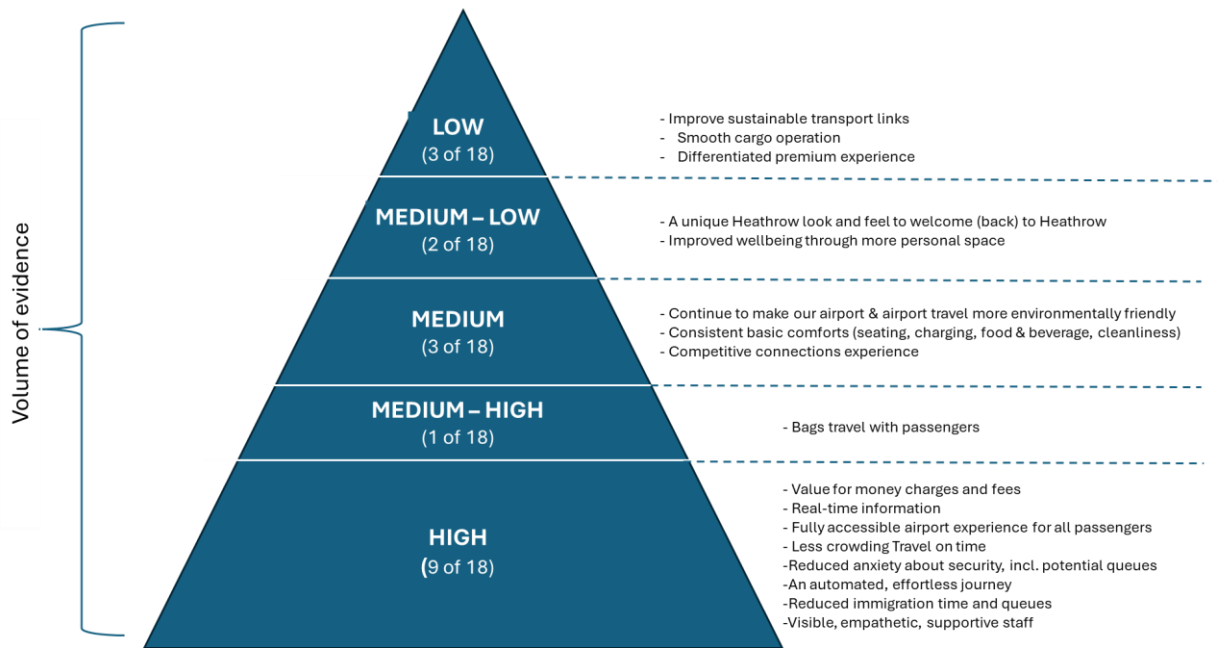
Source: Steer 2025-26, based on HAL H8 Business Plan

3.8 We present an illustration of some of the key links in Appendix C, which further emphasises the complexity of the underlying evidence base and its influence on the Business Plan.

Link to the 18 consumer priorities

3.9 We considered the volume (and absence/presence) of research that relates to the 18 consumer priorities and associated 15 objectives identified in the Business Plan. This was achieved by tracing through the themes from the research, via the touchpoints and the HAL needs and outcome framework to the 18 priorities, as illustrated in Figure 3.2. Most of the 18 consumer priorities are well-evidenced in the HAL body of research and are consistently reflected as high priorities by consumers. We note, however, that there is no information provided on how the 18 priorities have been prioritised amongst themselves.

Figure 3.2: Volume of evidence associated with the 18 priorities



Source: Steer review of Consumer Research and Table 34 of the H8 Business Plan, 2025

3.10 The *volume of evidence* is highest for priorities within the consumer outcomes of **I feel comfortable and secure at the airport, and I have a predictable and reliable journey** (excluding smooth cargo operation). In particular, there is emphasis on reductions in crowding, delays and queues at security and immigration, as well as improvements in punctuality. Whilst these outcomes are not solely determined by the actions of HAL¹⁸, they are consistently an important theme for consumers.

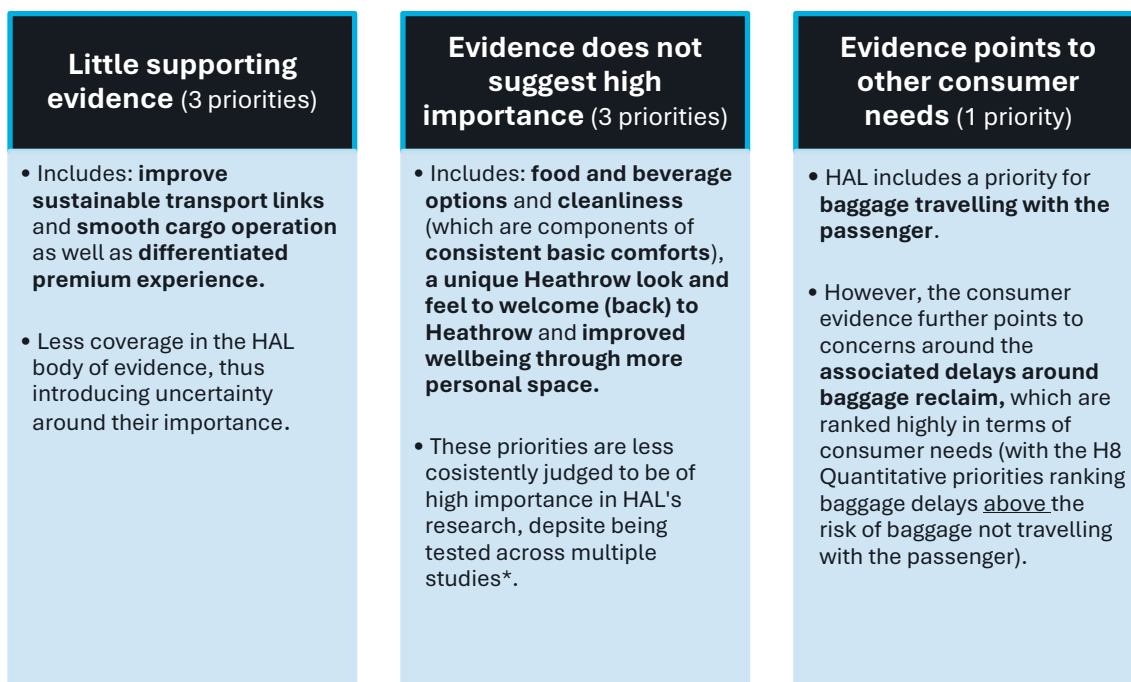
Interpretation of evidence

3.11 There are some priorities where we assess the *interpretation of the evidence* is not well-justified. These are shown in Figure 3.3 and are assessed as such because the evidence:

- is limited (i.e. a low volume of evidence). This covers the three priorities in Figure 3.2 that are considered “low”;
- suggests that the priority is not as high as HAL has ascribed. This covers the two “medium-low” priorities in Figure 3.2 and one from the “medium” category; or
- points to a priority other than that highlighted by HAL.

¹⁸ These outcomes can be heavily influenced by the actions of other stakeholders, such as airlines, ground handlers and air traffic management.

Figure 3.3: Assessment of the interpretation of evidence in the Business Plan



Source: Steer review of Consumer Research and Table 34 of the H8 Business Plan, 2025

[*] Note: Cleanliness is more of a hygiene factor which is likely to be prioritised by exception across the research. This is not however to say that lower cleanliness standards would be acceptable.

Other consumer priorities in the research

- 3.12 It is likely not practical nor feasible for HAL to cover the entire spectrum of consumer needs. Our working assumption has been that there has been a process of prioritisation undertaken by HAL in the development of the Business Plan. We note however that information demonstrating this has not been shared.
- 3.13 For completeness, therefore, we note the key themes and priorities in the research that would appear to be absent from HAL's priorities and objectives for H8 (or at least not an area of focus).
- 3.14 This is shown in Table 3.1 overleaf and considered from the perspective of the HAL-commissioned research and from the wider industry priorities, as identified by third-party studies.
- 3.15 In the case of the HAL-commissioned research, these "gaps" relate to three medium- or high-impact themes that have been identified across the qualitative and quantitative research but are then either omitted or have a weak line of sight into the key consumer priorities (as described in Table 34 of the Business Plan).

Table 3.1: Other consumer priorities, not clearly included within the H8 Business Plan

	Priority	Evidence	Commentary
HAL-commissioned research	(Long) walking distances in terminals	<ul style="list-style-type: none"> • ‘Long walking distances’ in Business Plan Table 32 is a medium impact level theme. • The H8 Qualitative Priorities report highlights how this has a particularly large impact on PRS passengers and gives ‘the walk to connect flights (connect only)’ as the sixth-ranked priority in Table 33 of the Business plan. 	<p>Given the relatively high prioritisation of this theme, it is expected that it would either be covered in the key consumer priorities listed in Table 34 of the Business Plan or addressed as part of other priorities or initiatives.</p> <p>Limiting long walk distances however does not obviously appear in the Business Plan against any of the priorities where it might logically be expected. In particular:</p> <ul style="list-style-type: none"> • Priorities and initiatives (Chapter 3 of H8 Business Plan, Table 34): <ul style="list-style-type: none"> – ‘Fully accessible airport experience for all passengers’: “Transform our service for passengers requiring assistance through tailored journey planning, flexible, just-in-time assistance, accessible facilities and accessible assistive technology to deliver empowerment, choice and independence.” – ‘Competitive connections experience’: “Enhance wayfinding, digital signage, real-time tracking and queue management, and improvements to onboard transit bus experience” • Outcomes (Chapter 3 of H8 Business Plan, Table 34): <ul style="list-style-type: none"> – ‘I have a predictable and reliable journey’: covering five priorities ‘Travel on time’, ‘Reduced anxiety about security, including potential queues’, ‘An automated, effortless journey’, ‘Reduced immigration time and queues’; and ‘Smooth cargo operations’.
	Wayfinding-improved signage	<ul style="list-style-type: none"> • ‘Wayfinding – improved signage’, is the 18th-ranked consumer priority according to the H8 Quantitative Priorities research (see Business Plan Table 33). • H8 Qualitative Priorities, ‘poor signage’ and ‘difficulties locating the right board to navigate the airport’ are features of the high-impact level theme of ‘poor dissemination of information’. • The ad-hoc research commissioned by HAL, such as the Tobii Wayfinding Report, also highlights challenges with signage and physical wayfinding. 	<p>Aside from ‘competitive connections experience’, poor physical wayfinding and signage is not covered in the key consumer priorities (Table 34 of the Business Plan).</p> <p>Nor is it made clear how potentially alternative solutions such as improved <i>digital</i> wayfinding will address the challenge for all passengers.</p>

	Priority	Evidence	Commentary
	Seating	<ul style="list-style-type: none"> Consistently an important passenger priority (19th and 20th out of 43 in the quantitative priorities research for availability and type of seating respectively). 	<p>Once this touchpoint reaches the 18 key consumer priorities, it is bundled with others such as cleanliness*.</p> <p>To some extent this appears to de-emphasise the importance of this priority in the Business Plan.</p>
Other evidence	Digital solutions & automation (also see Table 2.1)	<ul style="list-style-type: none"> The body of wider research highlights the increasing willingness of passengers to use digital solutions and automation to speed up airport processes. 	<p>The Business Plan reflects on the relative importance of current automation working and being available to passengers.</p> <p>However, the line of sight is not fully clear around the potential for new or lesser-used automation to be introduced to help improve processes outside of an isolated reference to ‘use technology to make journeys automated, effortless and personalised’ under the key consumer priority of ‘an automated and effortless journey’.</p>
	Baggage delay	<ul style="list-style-type: none"> Delays to baggage arrival for passengers were specifically highlighted as a key concern across numerous studies. 	<p>It is not particularly clear how this is being accounted for in the Business Plan.</p> <p>We note however that the 18 key consumer priorities (see Table 4.7, Bags travel with passengers) do capture the related priority on the importance of bags travelling with passengers.</p>

Source: Steer 2025-6, based on review of the H8 Business Plan and consumer research.

[*] Note: Although the availability of seating is consistently a high priority throughout the body of research, the other components that might be considered hygiene factors (such as food and beverage and cleanliness) have less evidence for being a high priority for consumers relative to non-hygiene factors.

Link with MTIs and service quality initiatives

- 3.16 The 18 consumer priorities (identified in Table 34 of the Business Plan) are intended by HAL to be the basis from which the various service quality, MTI, Opex and Capex decisions are developed. In particular:
- MTIs are categorised into one of the five consumer needs (Table 73 in Chapter 9 of the H8 Business Plan); and
 - Capex is presented against the 18 consumer priorities and the corresponding HAL beacon¹⁹ (see Table 89 in Chapter 10 of the H8 Business Plan)²⁰.
- 3.17 HAL has linked the MTIs to the consumer priorities through a quantitative approach undertaken by ICS Consulting. The analysis combines findings from four “evidence lenses” – the Consumer lens, Stakeholder lens, Business Plan lens, and an Airport benchmarking lens – to propose changes to the H7 service quality incentive scheme. A full review of the methodology deployed is beyond the scope of this report, rather our review has highlighted:
1. those measures where the Consumer lens priority deviates materially from that identified by HAL in the quantitative research²¹ (which ranks 43 different priorities); and
 2. consumer priorities identified by HAL which have not been mapped to the Consumer lens.

Observation 1: Measures where the Consumer lens priority deviates from the research

- 3.18 The changes proposed to the MTI framework in some cases result in differences between the relative priorities of certain measures in the framework compared to HAL’s view of the corresponding consumer priorities evidenced in the research (i.e. the application of the consumer lens effectively upgrades or downgrades the relative priority of some measures compared to the insights HAL has drawn from the research).

¹⁹ HAL has six beacons that underpin its strategic vision to be an “an extraordinary airport, fit for the future”. The beacons are winning team, focus to go faster, value for customers, digital future, people and planet, creating capacity. These are introduced on page 16 of the H8 Business Plan.

²⁰ We note that linkages to Capex have not been explored in any detail as part of this scope of work.

²¹ ICS Consulting, H8 Quantitative Priorities, July 2025.

Figure 3.4: Deviation in priority post-consumer lens

Upgraded priorities (3)	Downgraded priorities (2)
<p>Overall terminal crowding Medium → Medium/High Ranked 24/43 in the quantitative priorities study. However, is upgraded to be scored with the same qualitative level of prioritisation as departure lounge crowding.</p> <p>Terminal look and feel Low → Low/Medium Ranked 42/43 in the quantitative priorities study yet upgraded as a result of the ACI ASQ benchmarking as stated in the ICS Consulting report.</p> <p>Availability of pushchairs Low → Low/Medium Ranked 43/43 in the quantitative priorities research. Upgraded following comparison with the qualitative priorities study where pushchairs had a high priority.</p>	<p>Time for all your bags to be delivered High → Medium Ranked 10/43, in the quantitative research and has a high classification in the qualitative prioritisation study. Downgraded as a result of triangulation with the QSM data* (ranked low-medium).</p> <p>Departure lounge crowding High → Medium/High Consistently a high priority (ranked 13/43 in the quantitative priorities study and the subject of a deep dive into the key drivers of passenger satisfaction in the departure lounges). Yet it is prioritised as medium/high in the MTI framework.</p>

Source: Steer review of H8 Business Plan 2025-26.

* Note: We have not reviewed the QSM data in detail but note that the metrics for January to June 2025 suggest 'baggage system delivery' is on target.

Observation 2: Consumer priorities not linked to a measure

3.19 We note that not all 18 consumer priorities (as set out in Table 34 of the H8 Business Plan) are linked to a measure. Half are without an equivalent measure:

1. Value for money charges and fees;
2. Improve sustainable transport links;
3. Real-time information;
4. Less crowding (including seating);
5. Consistent basic comforts (seating, charging, food and beverage, cleanliness);
6. Differentiated premium experience;
7. A unique Heathrow look and feel to welcome (back) to Heathrow;
8. Improved wellbeing through more personal space; and
9. Smooth cargo operation.

3.20 In particular, HAL previously had a **seating measure** in its MTI framework (during Q6, Departure lounge seat availability was a financial measure). However, despite HAL highlighting the importance of seating availability to consumer outcomes, no seating measure is proposed for H8.

- 3.21 Further, the priority for a **smooth cargo operation** is quite broad and will likely be affected by multiple MTIs, none of which fully reflect the experience of the cargo community.

A Documents and studies included in the review

Table A.1: Documents and studies reviewed by Steer

ID	Document Title	Author	HAL commission	Year	Period	Pax	Cargo
1	Consumer Engagement Strategy	HAL	✓	2025	H8	✓	
2	Synthesis of consumer wants and needs, Stages 1-5 (extended)*	Blue Marble Research	✓	2025	H8	✓	
3	Synthesis of consumer wants and needs, Stages 1-3	Blue Marble Research	✓	2020	H7	✓	
4	WTP for a Premium Airport Experience*	Accent	✓	2025	H8	✓	
5	Sustainability Perceptions Research*	Savanta	✓	2025	H8	✓	
6	Heathrow Central Terminal Area (CTA) Development: Full Report*	RedC	✓	2025	H8	✓	
7	Heathrow Passenger Priorities*	Blue Marble Research	✓	2025	H8	✓	
8	The future of airports, A range of potential futures facing airports by 2050*	Verve	✓	2024	H8	✓	
9	Heathrow Climate Adaptation Report*	HAL	✓	2024	H8	✓	✓
10	Open To All*	Revealing Reality	✓	2021	H8	✓	
11	H8 CE Round 1 - HPF Session 25th February	HAL	✓	2025	H8		
12	H8 CE Round 2 - HPF Session 22nd April 2025 - PRS Deep Dive	HAL	✓	2025	H8		
13	H8 CE Round 2 - HPF Session 28th April 2025 - MTI Proposal	HAL	✓	2025	H8		
14	H8 CE Round 3 - HPF Session 4th July - Precursor & Consolidated Feedback	HAL	✓	2025	H8		

ID	Document Title	Author	HAL commission	Year	Period	Pax	Cargo
15	241112_H8CE_Round One_Theme 2 Customer	HAL	✓	2025	H8		
16	Consolidated Passenger Insights Report	Rainmakers	✓	2017	H7	✓	
17	CE - Round 1, Theme 4 - Capital choices (shared)	HAL	✓	2025	H8		
18	CE - Round 2 - H8 Choices - Part 2 (presented)	HAL	✓	2025	H8		
19	H8 Quantitative Priorities (Research report) *	ICS Consulting	✓	2025	H8	✓	
20	Appendix A7 Summary of Passenger Priorities Quantitative Research*	ICS Consulting	✓	2025	H8	✓	
21	Passengers requiring support: barriers research*	Revealing Reality	✓	2024	H8	✓	
22	Heathrow Cargo Partners Research*	Firebrand	✓	2023	H8		✓
23	Impact of Digitalisation and automation on the passenger experience	ACI Europe		2024	H8	✓	
24	Passenger Satisfaction: Perspective on Departure Lounge Congestion	HAL	✓	2025	H8	✓	
25	Heathrow Connections: Full Report*	RedC	✓	2025	H8	✓	
26	H7 Heathrow Airport Customer Valuation Research	Systra	✓	2017	H7	✓	
27	Consumer Survey	CAA/Savanta		2024	H8	✓	
28	Heathrow Airport Aggregate Benefit Value Study	Systra	✓	2019	H7	✓	
29	Departing Passenger Survey	CAA		2024	H8	✓	
30	Global Passenger Survey	IATA		2024	H8		
31	ASQ Quality of Service	ACI		2025	H8	✓	
32	Airport Service Quality	Skytrax		2025	H8	✓	
33	International Passenger Survey	ONS		2024	H8	✓	
34	Airport Experience Research	Airport Dimensions / Dynata		2023/24	H8	✓	
35	Heathrow Performance Review	HAL		2025	H8	✓	

ID	Document Title	Author	HAL commission	Year	Period	Pax	Cargo
36	Best airport service in the world	Revealing Reality	✓	2019	H7	✓	
37	ASQ Global Traveller Survey, Airport Travel Experience: Trends and Opportunities	ACI		2024	H8	✓	
38	Heathrow Airport Customer Valuation Research	Systra	✓	2018	H7	✓	
39	Communicating during travel disruption	Verian		2024	H8	✓	
40	Maximising the Elizabeth Line to Heathrow	Basis	✓	2024	H8	✓	
41	Heathrow Wayfinding and Passenger Experience Evaluation	Tobii	✓	2024	H8	✓	
42	Airline Prioritisation of Passenger Improvement Attributes to include in Priorities Research	HAL	✓	2023	H8	✓	
43	Heathrow Airport Performance Benchmarked Against International Peers	Airline Benchmarking Group	✓	2025	H8		
44	H8 Quantitative Priorities, Appendices	ICS Consulting	✓	2025	H8	✓	
45	Future of Airport Experience: 2050	The Future Laboratory	✓	2024	H8	✓	
46	Review of incentive approaches in comparator regulated sectors	ICS Consulting	✓	2025	H8		
47	H8 Financial incentives: Principles-based approach and rates	ICS Consulting	✓	2025	H8		
48	Beyond duty-free: the future of aviation retail	KPMG		2025	H8	✓	

Source: Steer 2025, correct as of 17 October 2025

B Challenges reviewing a portfolio of research

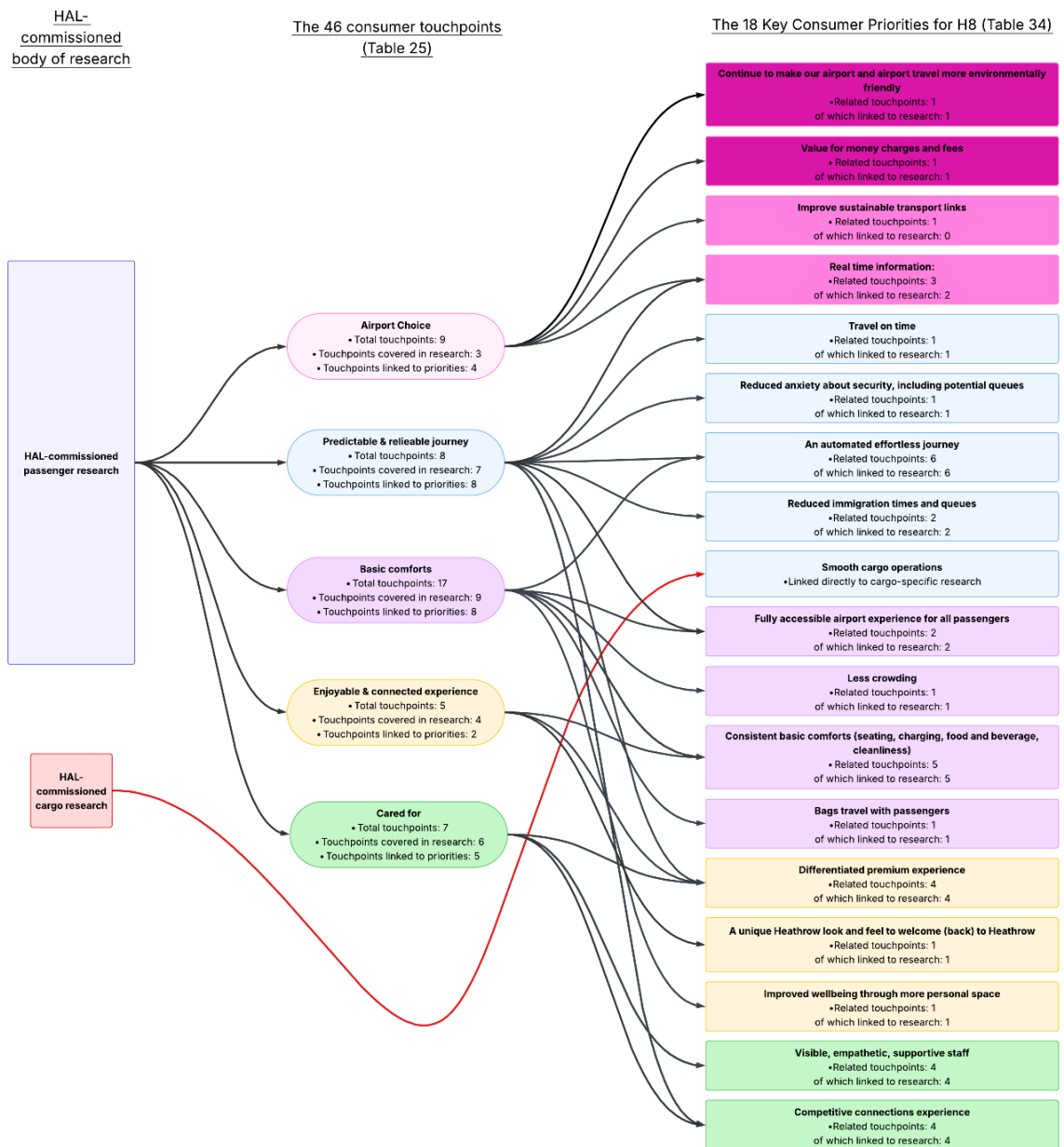
This commission required the drawing of insights *across a portfolio of research*. A particular and noteworthy challenge here was accounting for the different methodologies used and resulting sample dynamics and/or biases that can ensue. In particular:

- **Response context:** triangulating insights from passengers making trips (recruited at the airport) with those of potential future passengers or passengers recalling past experiences at the airport. Those recruited at the airport will be heavily influenced by the current experience, whereas past and future passengers will be drawing on memorable aspects of the experience or their expectations, which may not be entirely grounded in reality. In addition, participants recruited at the airport are more likely to be frequent travellers, which may affect the sample composition.
- **Understanding the reference point:** related to the sampling method, clarity is needed on the experience that consumers are ‘measuring’ from. This ensures commonality in terms of, for example, the quantum of improvement that consumers are evaluating. This is a particular challenge across a body of research that is multidimensional (covering different points in time, different and diverging consumer groups and across different airport terminals where the levels of service may differ). However, a triangulation/validation process – using the entire body of research to draw out the themes – can help mitigate risks of individual studies producing ‘outlier’ evidence.
- **Sample composition:** ensuring that samples are sufficiently representative of the views of all groups to allow for extrapolation to ‘population’ levels of current and future consumers. This is a particular challenge for international (i.e. non-UK resident) passengers using the airport who may be more difficult to engage with for reasons of language, culture and underlying appetite to participate in market research – while the global geographic scope of past or potential future international passengers is impractically wide. It is not realistic to expect a material sample to be achieved from each and every international market served by Heathrow. Rather, it is important that any limitations or uncertainties that exist with respect to passengers from those markets are understood and accounted for.
- **Temporal considerations:** attitudes and perceptions shift over time and at different rates dependent on the background context. Material shifts can be triggered by internal and external factors such as the COVID-19 pandemic, the impact of the media (on for example, topics of sustainability), policy changes

(perhaps highlighting the needs of those requiring greater levels of support) or airport events (e.g. highlighting the need for greater levels of operational resilience). To counter this, key-stone components of research need to be repeated periodically to re-check consumer priorities, needs and wants. This is particularly true of insight gathering around propensity to adopt new and emerging technology, and digital solutions where the research needs to match the pace of industry change.

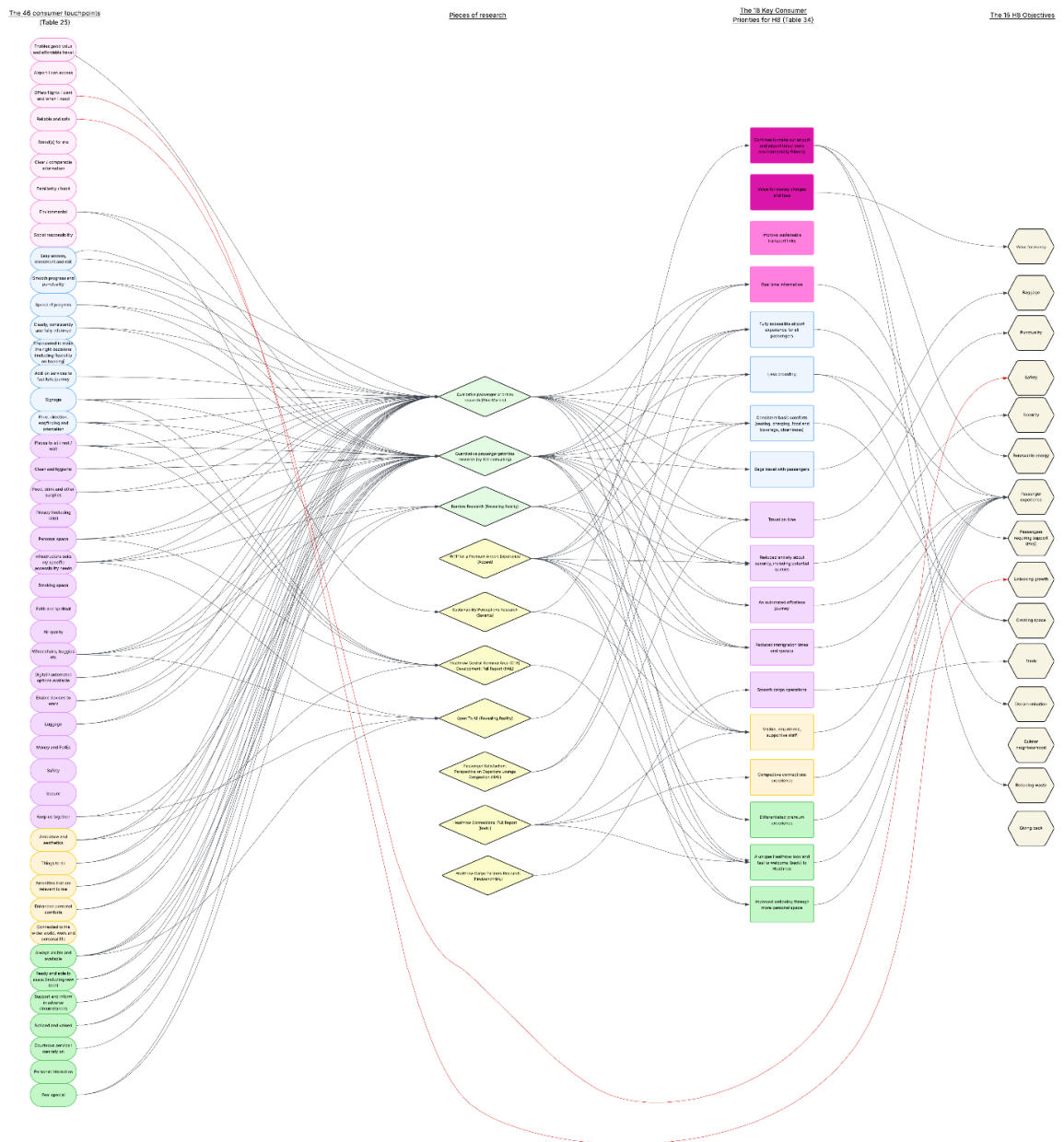
C Interaction between the evidence and the Business Plan

Figure C.1: High level linkage between BP tables



Source: Steer 2025-26

Figure C.2: Detailed linkages between BP tables



Source: Steer 2025-26

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DRAFT Summary Report v1.0

DRAFT Summary Report v2.0

DRAFT Summary Report v3.0

DRAFT Summary Report v4,0 (Post fact checks)

FINAL Summary Report 5.0

Date

21 January 2026

05 February 2026

24 February 2026

16 March 2026

25 March 2026

