

HEATHROW TRAVEL REPORT

2025

Incorporating the Sustainable Travel
Zone Annual Report – Year Four

Heathrow

EXECUTIVE SUMMARY

The 2025 Heathrow Travel Report provides information on progress towards our surface access targets as set out in our Surface Access Strategy. As with the 2024 Report, the Sustainable Travel Zone Report is incorporated within this document. This annual issuing of the Travel Report is part of our sustainability reporting, providing a public record of our performance on surface access over time.

How people travel to and from Heathrow is critical for our operation. We are committed to improving the range of travel options as well as the quality of each individual’s experience. We published our Surface Access Strategy in 2022 with sustainability at its heart, setting out a vision to transform journeys to and from Heathrow by making them faster, easier, more reliable and more sustainable. To do this, it is vital to understand how surface access networks are being used.

This report provides information on the key surface access targets set out in our Surface Access Strategy, and a summary of the improvements delivered in 2025.

The first of these is air passenger public transport mode share. In 2025, our Profiler passenger survey data showed that this was 46.3% across the whole year; above our target mode share of 45% by the end of 2026, and 1% higher than 2024.

The second metric is colleague single-occupancy-car mode share. As with passengers, we need to encourage colleagues to reduce the number of vehicle trips they take to work at the airport. The Colleague Travel Survey took place in 2024 and provides a vast array of colleague travel data. The results show that colleague single-occupancy-car mode share has reduced by 10% since 2017 and now sits at 52%, well below our target of 57% by 2026.

The third metric is surface access carbon emissions. In 2025, our surface access-related emissions (by colleagues and passengers) were 533,742tCO₂e, demonstrating a reduction of 29% compared to our 2019 baseline, and showing good progress towards our target to reduce surface access emissions by 49% by 2030.

The final metric is our passenger public transport catchment. In 2025, we have increased the population within 1.5 hours public transport journey time of Heathrow by 53% and 3 hours by 16% compared to our 2019 baseline. It should be noted that we had already achieved our 2026 targets for the 1.5-hour journey time in 2023 and for the 3-hour in 2024, and this most recent analysis confirms a maintained position ahead of target.

In 2025 we continued to build on the success of previous years with the introduction of an earlier Heathrow Express service, daily at 04:34 (04:55 on Sundays and bank holidays); the introduction of free colleague travel on the H5X service between Renaissance Hotel and Terminal 5, an improvement in frequency of the Terminal 5 colleague shuttle to Compass Centre at peak times and a Christmas Day service to fill the gap left by the lack of TfL buses. This follows on from 2023 which saw the full running of the Elizabeth line, the ULEZ expansion and the implementation of 23 new or improved bus and coach services, and 2024 where 14 bus services were enhanced, 11 of which were funded by Heathrow.

CONTENTS

EXECUTIVE SUMMARY	2	IMPROVEMENTS TO SURFACE ACCESS IN 2025	20	SUSTAINABLE TRAVEL ZONE ANNUAL REPORT	24
2025 OUTCOMES AS A DIRECT RESULT OF SURFACE ACCESS ACTIVITIES AND INVESTMENT (STZ)	6	Central Bus Station Upgrade	20	Design Principles	26
INTRODUCTION	8	Mobile Display Units in The Central Terminal Area	20	Results	27
What is the Heathrow Travel Report	8	Electric Vehicle (EV) Charging Hubs	20	Priority One	28
Why produce a Travel Report	8	Academy Relationship and Job Centre Plus (JCP) Partnership	21	Priority Two	30
SURFACE ACCESS CONSIDERATIONS AT HEATHROW	10	Way2go Outreach and Team Heathrow (TH) Business Engagement	21	Priority Three	31
FLIGHT, PASSENGER AND CARGO STATISTICS	12	Way2go App Membership Growth and TfL Case Study	22	Priority Four	32
Flight Statistics	12	Progress Of Heathrow’s Local Cycling and Walking Infrastructure Plan (LCWIP) And Heathrow’s Active Travel Portfolio	23	Priority Five	34
Air Passenger Statistics	13	Heathrow Express (HEX)	23	Christmas Day	36
Cargo Statistics	13	Tackling Nuisance Parking and Authorised Vehicle Area (AVA) Upgrades	23	Boxing Day	37
SURFACE ACCESS HEADLINE METRICS	14			Update on Go2Gate	38
Public Transport Mode Share for Passengers	14			Update on Luggage Racks	39
Single-Occupancy-Car Mode Share for Colleagues	16			Update on Reading Park & Ride	40
Surface Access Carbon Emissions	18			Car Share	41
Public Transport Catchment for Passengers	19			Marketing	42
				Maps	48
				CONCLUSIONS AND CLOSING REMARKS	55

2025 OUTCOMES

AS A DIRECT RESULT OF SURFACE ACCESS ACTIVITIES AND STZ INVESTMENT



21.6m

people (32% of the UK population) live within a 3hr public transport catchment of Heathrow



£5m

Confirmed investment decision to improve Central Bus Station capacity



3 out of 4

Surface Access targets for 2026 have already been met

93.7%

of passengers rating HEx as Excellent or Good throughout the year



WAY 2 GO

57

Way2Go roadshows reached 3,000+ Team Heathrow colleagues



Business engagement activities with Team Heathrow businesses representing over

9,000

airport colleagues



Patronage on three services, 102, 730 and H21, increased by 51.6%, 47.8% and 47.2% respectively in 2025





On Christmas Day, a special 111 service operated between Heathrow Central and Hanworth Road (Godfrey Way), and the H31 service ran free for Team Heathrow

An earlier Heathrow Express service now departs daily at

04:34

from Paddington





Way2Go app registrations increased by

86%

in 2025

Passenger public transport mode share increased to

46.3%*

in 2025



* profile data

Go2Gate

Passenger feedback on the Go2Gate service was rated an average of

9.9 out of 10

Since 5 January 2025 Team Heathrow have benefitted from free travel on the H5X shuttle between Renaissance Hotel and Terminal 5



Team Heathrow now receive discounts on 21 public transport services departing Heathrow and free travel on 9 services**

**an additional free service was also available on the H31 on Christmas Day

INTRODUCTION

WHAT IS THE HEATHROW TRAVEL REPORT

The 2025 Heathrow Travel Report provides an update on progress towards our surface access targets as set out in our Surface Access Strategy¹, published in 2022.

Surface access refers to all the ways in which passengers, visitors, colleagues and goods travel to and from Heathrow. This includes travelling to or from Heathrow by public transport, taxis, private hire vehicles, cars, lorries, walking and cycling. It does not include trips by aircraft (e.g. transfer passengers or crew).

We intend to annually issue an updated Travel Report, providing a public record of our performance on surface access over time. The 2019 Travel Report was our first, and the 2023 Travel Report was the second publication. This was because the Covid-19 pandemic led to significant changes to demand for flights, surface access network use and how Heathrow operated as an airport. As such, we did not publish a Travel Report for 2020, 2021 or 2022. This year the Sustainable Travel Zone report, which has previously been published separately, is incorporated into this document. This report brings together publicly available datasets and Heathrow-owned datasets to create the best possible insight into Heathrow-related surface transport.

Data contained in this report has been collected in a way that can be replicated for future reports, enabling trends and patterns to be identified over time. We will endeavour to present data in the most appropriate format and medium available at the time of each publication, whilst maintaining consistency in the metrics and type of data. We may however choose to introduce new datasets in the future, as and when they become available.

WHY PRODUCE A TRAVEL REPORT

How people travel to and from Heathrow is critical for the airport’s operations. We are committed to improving the range of options for people travelling to and from Heathrow and improving the quality of their experience, particularly in relation to the speed, ease and reliability of journeys. Most importantly, this includes Heathrow’s aspiration to get passengers and colleagues travelling more sustainably to the airport, reducing the impact of congestion and emissions on the surrounding areas. To do this, it is vital to understand how people are using the surface access network today.

Heathrow cannot manage and improve surface access without the involvement of others. To this end, we work closely with the Heathrow Area Transport Forum (HATF). This is a body put in place following guidance in the Aviation Policy Framework² by the Department for Transport (DfT) to scrutinise Heathrow. It brings together various organisations in the private and public sectors seeking to improve accessibility and increase public transport use to, from, and in the area around Heathrow. In 2025, we continued to work closely with Heathrow’s Local Community Forum in order to tackle issues which impact local residents. We have had notable success in the measures designed to reduce nuisance parking including Public Space Protection Orders in Hillingdon and Spelthorne, improvements to Private Hire Vehicle driver facilities in the Authorised Vehicle Area, and widespread comms about the online reporting portal available to residents. The publication of the 2025 Heathrow Annual Travel Report provides HATF and other stakeholders with transparency around the operation of surface access at Heathrow and allows us to work closely with them to improve surface access around the airport.

The Annual Travel Report shows our performance against targets set out in our Sustainability Strategy, Heathrow 2.0: Connecting People and Planet³, Net Zero Plan⁴ and Surface Access Strategy. Heathrow 2.0 represents a step-change for our business and captures the momentum of an industry-wide shift towards a sustainable future.

Our targets are to:

- 1

Achieve a passenger public transport mode share of **45% by 2026**
(compared to a 2019 baseline of 40%).
- 2

Achieve a colleague single-occupancy-car mode share of **57%**
(compared to a 2017 baseline of 62%).
- 3

Reduce surface access carbon emissions by **49% by 2030**
(compared to a 2019 baseline of 747,879tCO₂e).
- 4

Expand the catchment area to bring **25% more people** within a 1.5-hour public transport journey time of Heathrow and to increase the 3-hour catchment population by 12% – both by 2026.

¹ Heathrow’s Surface Access Strategy, 2022.
² The UK Government’s Aviation Policy Framework.

³ Heathrow 2.0: Connecting People and Planet, 2022.
⁴ Heathrow’s Net Zero Plan, 2022.

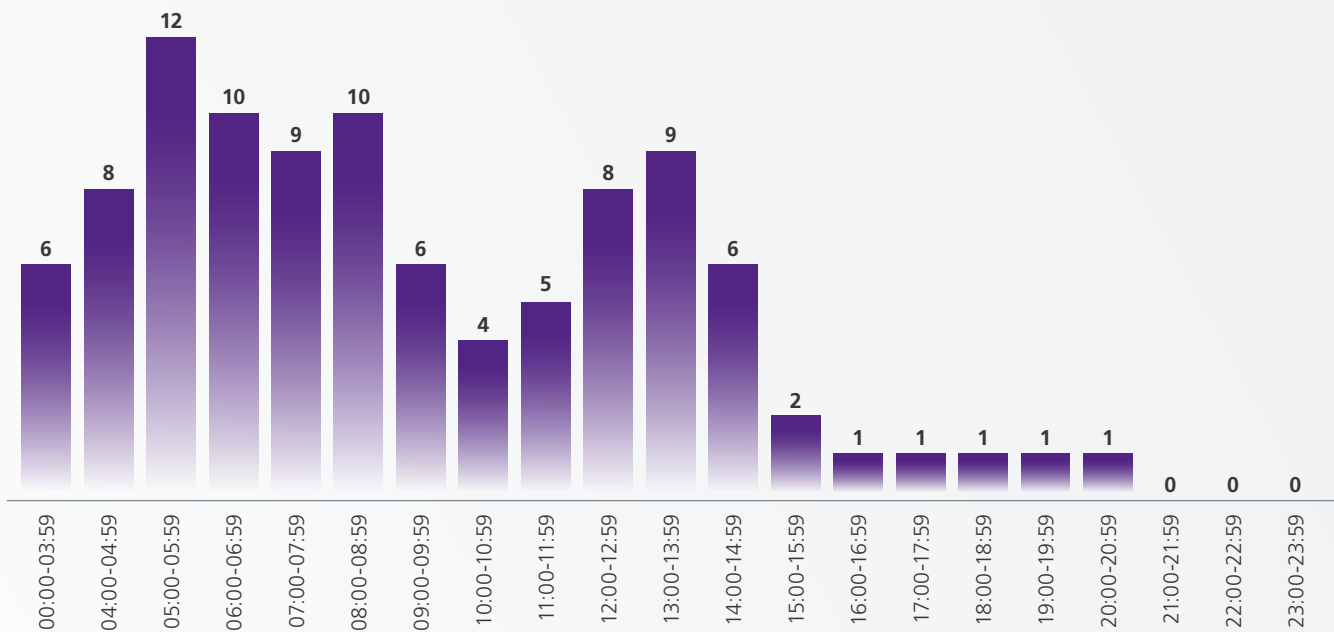
SURFACE ACCESS CONSIDERATIONS AT HEATHROW

It is important to understand the drivers of surface access demand at the airport, in contrast with general travel demand in a city or town.

Airports operate under different conditions to typical workplaces, requiring staff 24 hours a day. There are around 80,000 colleagues working at Heathrow, many of whom work non-traditional shift patterns, starting early in the morning or finishing late at night. Similarly, flights arrive and depart the airport throughout the day, and passenger travel by surface access reflects this.

Therefore, the traditional travel demand pattern with a morning peak and an evening peak does not apply at Heathrow. Instead, the number of passengers arriving and departing the airport is fairly consistent throughout the day and is much lower at night when flights do not operate. Similarly, colleagues tend to access the airport at non-traditional hours, as shown in Figure 2.1.

Figure 2.1: Colleague time of arrival (%)
(based on 2024 Colleague Travel Survey responses)



Another factor that differentiates journeys to Heathrow is the peak demand for flights during holiday periods such as the school summer holidays, Christmas, and New Year; this is when wider demand for travel on surface access networks tends to be lower.

Heathrow also acts as a hub for freight, with cargo movements being made 24 hours a day, 365 days a year. These movements are typically made on road by large vehicles such as lorries and vans and as such require specific road provisions to ensure safe access to and from the airport.

It is therefore clear that travel demand at the airport differs considerably to general demand in cities, towns or other workplaces, and thus enabling fast, efficient, accessible and reliable journeys across all users and all modes of surface access is a unique challenge.

To meet this challenge, Heathrow must work closely with public sector organisations, transport operators, and airport stakeholders across rail, underground, bus, coach and roads. This is because, although Heathrow provides and manages much of the surface access infrastructure within the airport (such as the internal perimeter roads, forecourts, and bus and rail stations), services are often run and operated by third parties.

This unique context and Heathrow's broader goals are captured and addressed in the key aims of the Surface Access Strategy, which are to:

- Reduce congestion
- Improve local air quality
- Improve sustainable transport options for local communities, passengers and colleagues
- Improve access to employment opportunities
- Improve colleague wellbeing
- Increase operational resilience
- Reduce issues in local communities (such as nuisance parking)

FLIGHT, PASSENGER AND CARGO STATISTICS

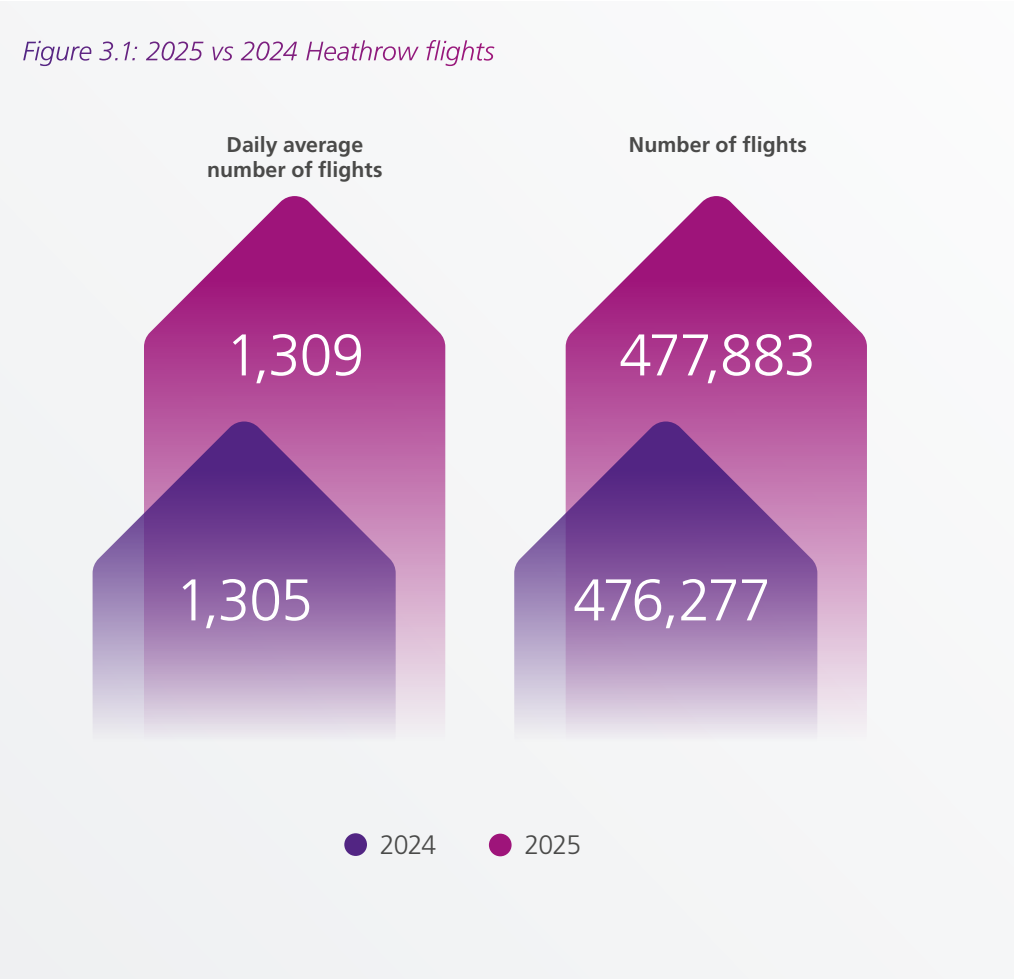
This section provides a summary of Heathrow flight, passenger and cargo statistics as published in our Traffic Statistics data sheets⁵.

FLIGHT STATISTICS

Heathrow is currently limited to a maximum of 480,000 Air Transport Movements (ATMs) per year (with the year running from 01 April to 31 March). This cap is a condition of the planning permission that was granted for Terminal 5 and took effect from ATM year commencing 01 April 2008. In the calendar year, 2025, Heathrow operated 477,883 ATMs.

While the airport is technically open 24 hours a day, it has a night quota allocation that is determined by the Department for Transport (DfT) and updated periodically. The night quota comprises of a movement limit and a noise quota limit. Heathrow's movement limit is currently capped to 5,800 night-time take-offs and landings per year between 23:30 and 06:00.

The majority of Heathrow's night flights are early morning arrivals which are scheduled between 04:30 and 06:00. Heathrow has a voluntary ban in place that prevents these flights from landing before 04:30. Heathrow does not schedule any departures between 23:00 and 06:00.



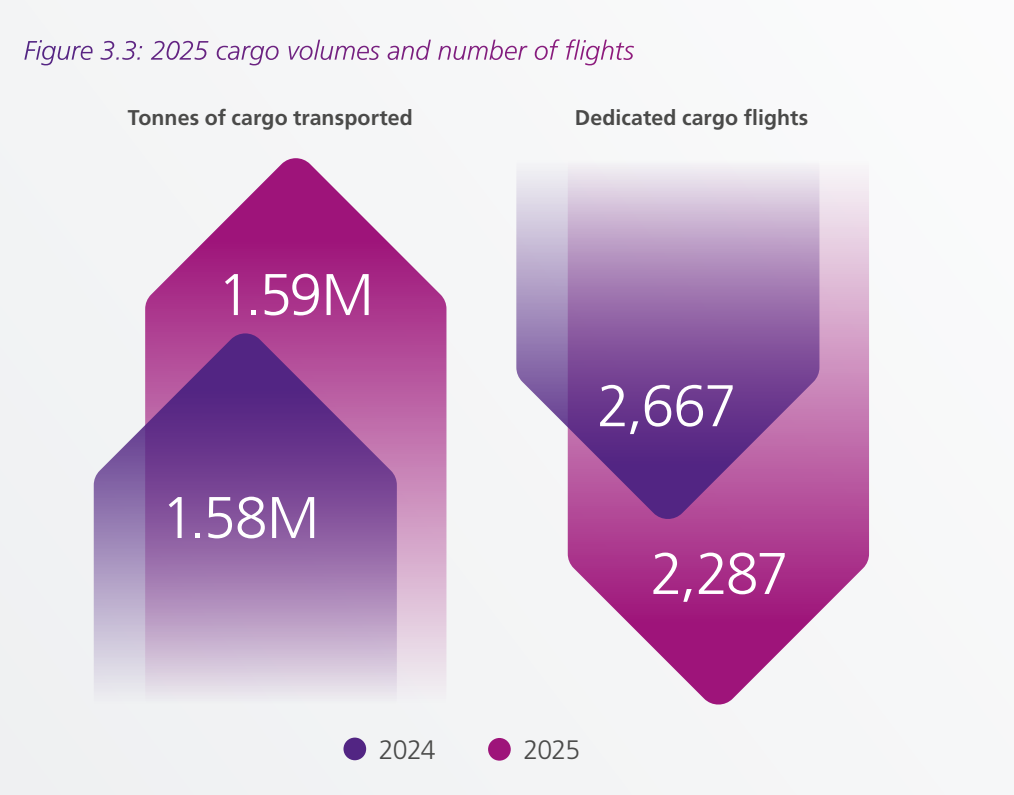
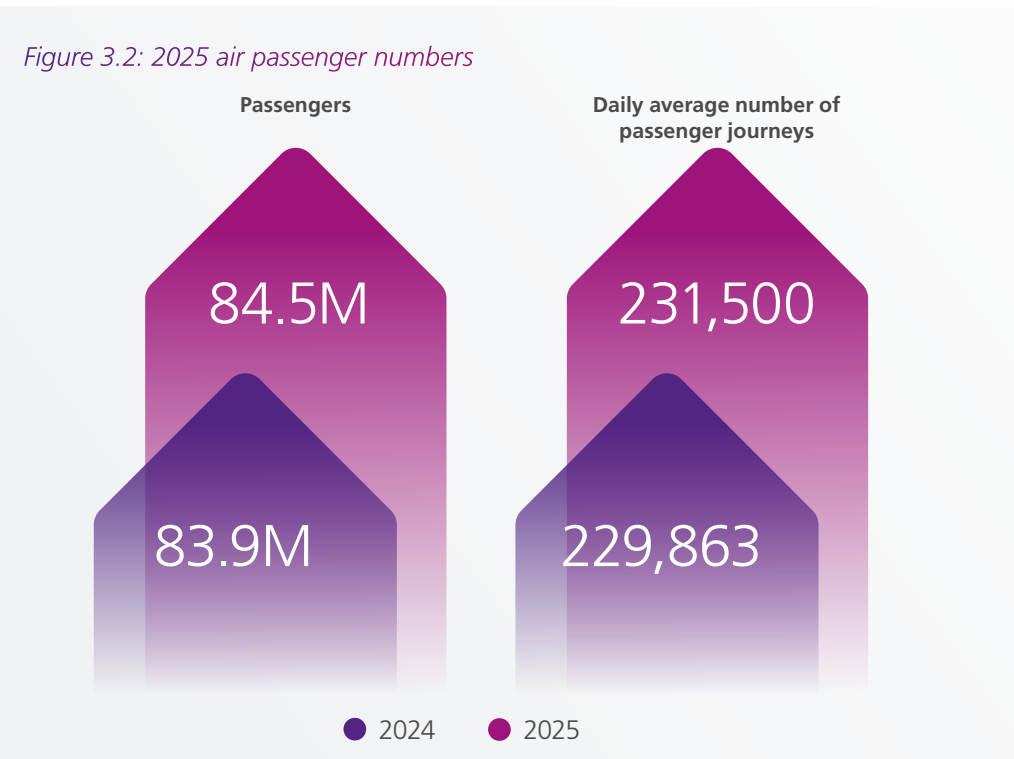
AIR PASSENGER STATISTICS

In 2025, Heathrow recorded its busiest year ever with 84.5 million air passengers, demonstrating continued growth after a record-breaking year in 2024. Heathrow is the busiest airport in the UK by a large margin, followed by Gatwick Airport as the next busiest with a reported 42.8 million air passengers in 2025⁶.

Whilst the majority of passengers are making journeys that start or end at Heathrow, the airport's hub role also means that there are a significant number of passengers connecting between flights without leaving the airport, known as transfer passengers. In 2025, transfer passengers made up 20.1% of total passenger numbers. These passengers do not touch surface access networks at or around Heathrow.

CARGO STATISTICS

Heathrow moved a total of 1.59 million metric tonnes of cargo (0.8% up on 2024), reinforcing our role as the UK's largest port by value with over £293bn of goods flown. Whilst most cargo moved through the airport is carried in the belly hold of passenger flights, there were 2,287 dedicated cargo flights in 2025.



⁵ Heathrow Monthly Traffic Statistics Jan 25

⁶ Size of UK Airports Report

SURFACE ACCESS

HEADLINE METRICS

This section provides information on our headline metrics related to travel to and from Heathrow.

These four metrics reflect our surface access targets as set out in our Surface Access Strategy and underpin how we will manage surface access in the future.

PUBLIC TRANSPORT MODE SHARE FOR PASSENGERS

Our target is to achieve a passenger public transport mode share of 45% by 2026 (compared to a 2019 baseline of 40% and based on Civil Aviation Authority data).

Increasing the number of passengers who use public transport to travel to and from the airport will help reduce congestion and cut emissions from private vehicle trips, limiting the environmental impact on local communities around Heathrow.

Data on passenger public transport mode share is collected by our own Heathrow Profiler departing passenger survey. The Heathrow Profiler data provides a robust method for measuring public transport mode share.

For 2025, the average public transport mode share for passengers was 46.3%. This is a 1.1% increase on 2024. This is now the second year that we have reached and surpassed our 2026 target.



Figure 4.1: 2019 to 2025 passenger public transport mode share (Heathrow Profiler data)

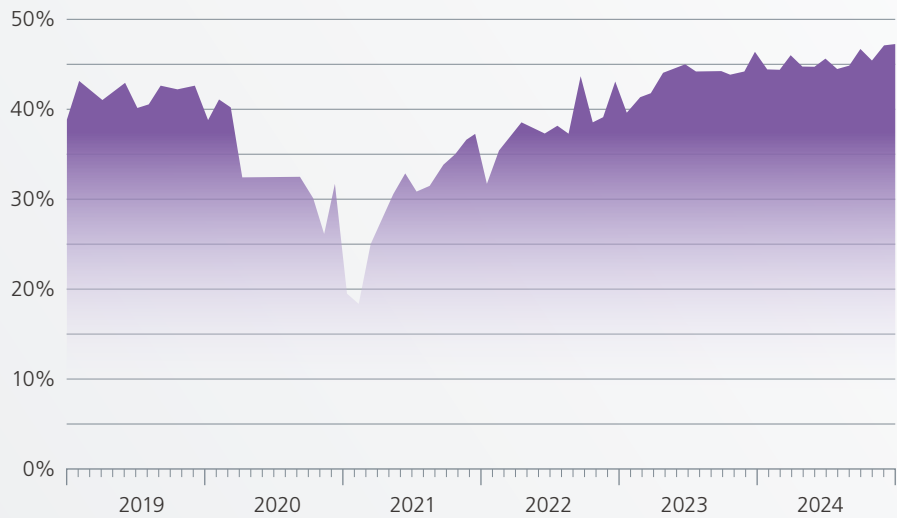


Figure 4.2: 2025 passenger public transport mode share (Heathrow Profiler data)

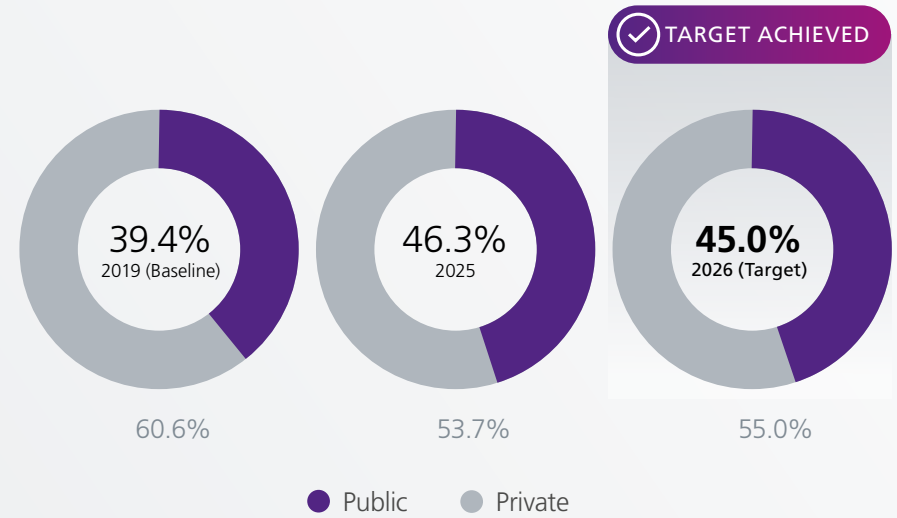


Figure 4.3 shows the full breakdown of passenger mode shares for 2025. Compared to 2024 data, private modes decreased by 1.03%, of which the majority came from a reduction in rental car. Conversely, public modes increased from 45.2% to 46.3%.

The increase in public transport modes is largely generated by a 2.7% growth on the Elizabeth line. Bus and coach mode share also increased (by 0.08% and 0.3% respectively). However, there was a decrease in Piccadilly Line (-2.38%), which is likely due to further redistribution onto the Elizabeth Line. Whilst we have already achieved our 45% target (according to Profiler data), we are continuing to push to improve upon this. It is noted that Heathrow's Profiler data has historically differed slightly from the CAA's mode share data by virtue of the fact that both data sets are based on survey responses. Heathrow tracks performance against target for both data sets, however CAA data for 2025 hasn't been formally published at time of writing this report. Future targets will be considered as part of the development of a new Surface Access Strategy for H8 and prospective future growth plans.

SINGLE-OCCUPANCY-CAR MODE SHARE FOR COLLEAGUES

Our target is to achieve a colleague single-occupancy-car mode share of 57% by 2026 (compared to a 2017 baseline of 62%).

We had previously used a definition of 'staff' (colleagues) with the Department for Transport as being: "persons working within the Airport boundary or travelling to the Airport for employment within the aviation industry whether they are directly employed by Heathrow Airport Limited or not". We refer to these as 'Team Heathrow colleagues' and it is estimated that there are currently around 80,000 colleagues working at more than 600 businesses.

Figure 4.3: 2025 passenger mode share (Heathrow Profiler data)

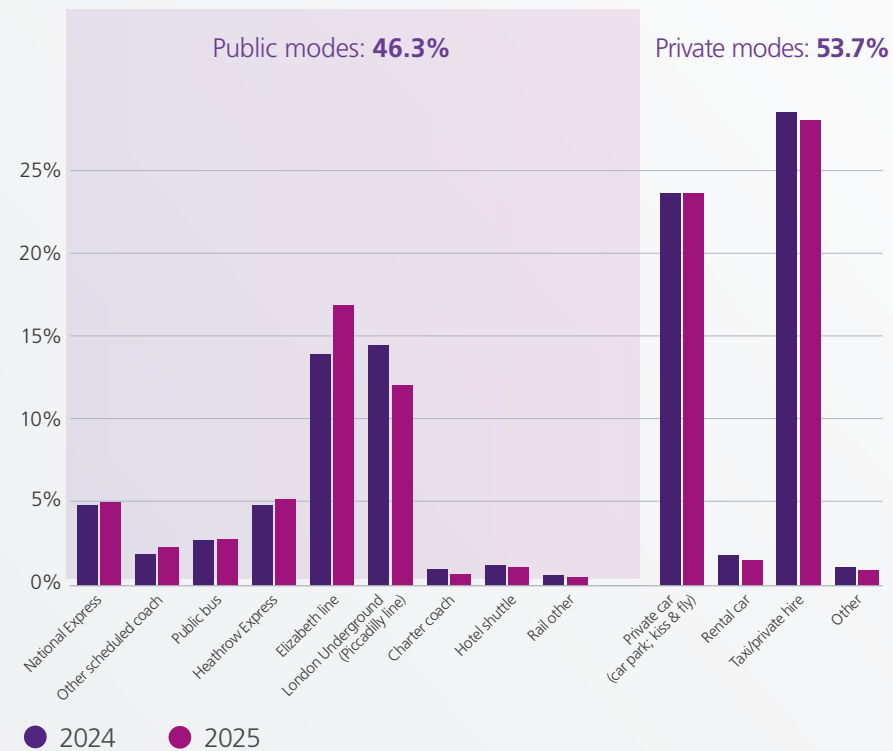
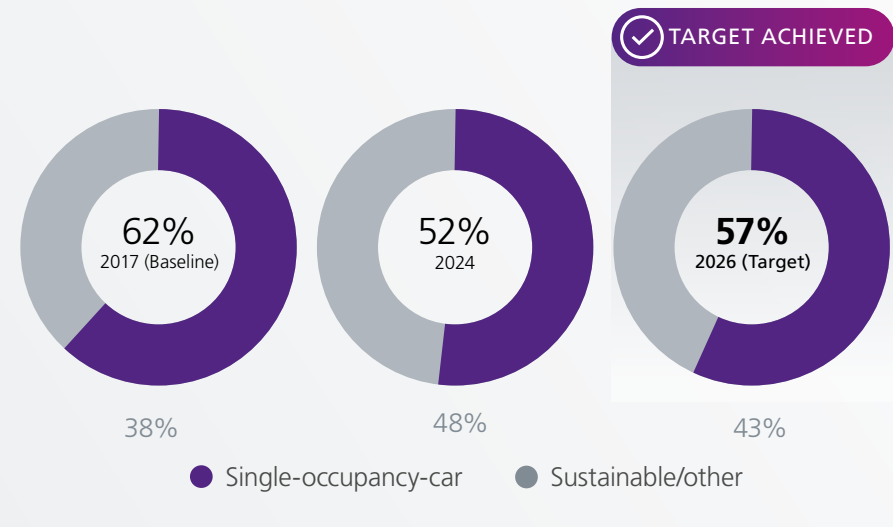


Figure 4.4: 2024 colleague single-occupancy-car mode share (N.B. The data is from the 2024 Colleague Travel Survey which is the most recent dataset)

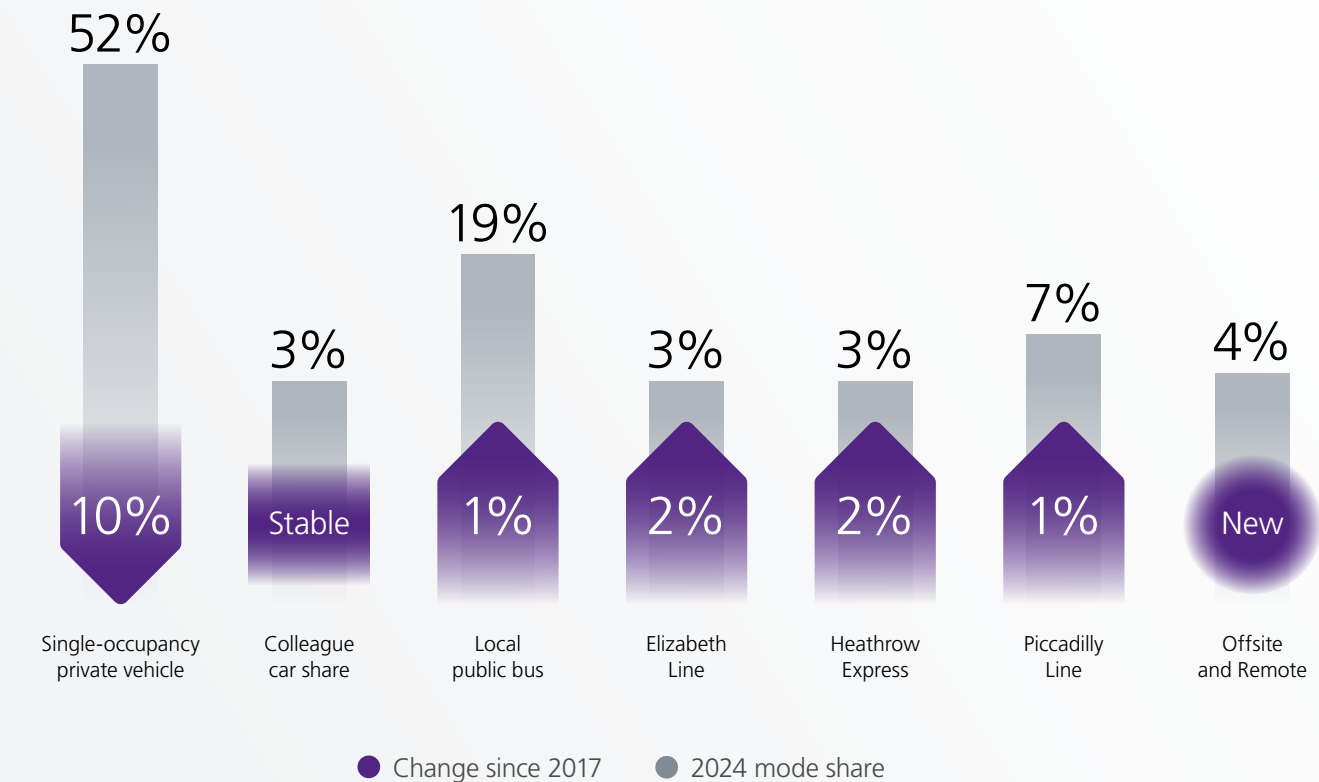


As with the passenger public transport mode share metric, reducing the number of car trips made by our colleagues is important to limit the impact of the airport's operations on local communities. These trips are of particular importance because, in contrast to passenger journeys, they are regular and habitual in nature.

The data source for colleague mode shares is the Heathrow Colleague Travel Survey. This was undertaken in 2024, and the results were published in early 2025. The data shows that there has been a significant 10% reduction in single-occupancy-car commuting trips and the mode share now sits at 52%. This means we have already hit, and improved upon, the 2026 target. The intention is to carry out the next colleague travel survey in 2027.

Figure 4.5 shows an overview of colleague mode share and how it compares to 2017, and Figure 4.6 shows a more detailed breakdown of this data. Although over half of all colleague journeys are in single-occupancy private vehicles, there has been a very significant decrease of 10% in this mode since 2017. Simultaneously, there has been an increase in the use of both bus and rail for commuting journeys. The 2024 survey also captured, for the first time, the proportion of Team Heathrow colleagues who worked offsite and remotely and therefore did not commute to Heathrow. The number of journeys this saves is equivalent to a 4% mode share. Since Covid-19, the prevalence of remote working has helped reduce the number of vehicle trips to the airport.

Figure 4.5: Complete mode share breakdown from 2024 Colleague Travel Survey (N.B. The data is from the 2024 Colleague Travel Survey which is the most recent dataset)



The Colleague Travel Survey also captured data on the locations from which Team Heathrow colleagues are commuting. This is shown in Figure 4.6 below.

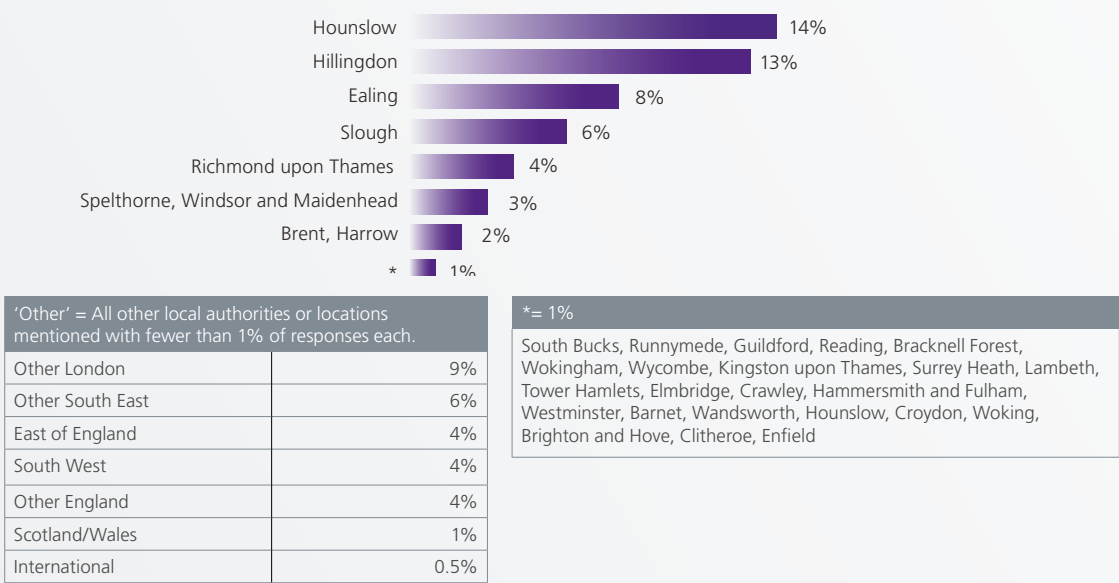
Based on this data and to ensure further reduction in colleague car trips, a Team Heathrow colleague travel engagement strategy was developed. This plan has four key pillars: engagement; car sharing; public transport; active transport.

For each pillar the plan lays out both proposed activities and stretch ambitions around how we will engage with Team Heathrow colleagues and businesses and encourage the required shift to sustainable commuting. This is a live document which will be reviewed on a 'test and learn' basis.

In addition, data from attitudinal questions in the colleague travel survey alongside several in person interviews,

enabled the development of a set of five Team Heathrow Personas. These Personas profile different types of Team Heathrow colleagues – what their barriers to change are and what motivates them. The intention is to use these to help develop more targeted communications, engagement and interventions to achieve successful mode shift amongst colleagues.

Figure 4.6: Local authority from which Team Heathrow Colleagues travel to the airport (%) (On last trip to work at Heathrow) (N.B. The data is from the 2024 Colleague Travel Survey which is the most recent dataset)



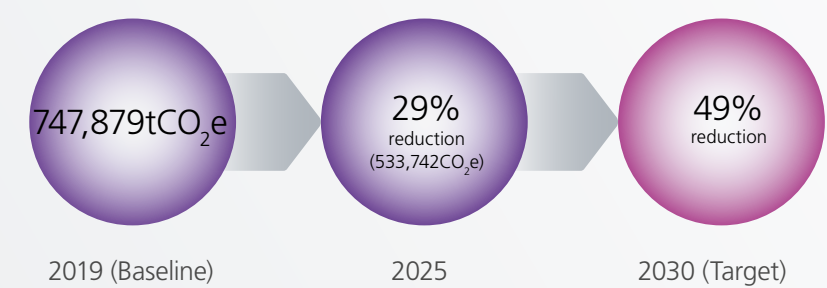
SURFACE ACCESS
CARBON EMISSIONS

Our target is to reduce surface access carbon emissions by 49% by 2030 (compared to a 2019 baseline of 747,879tCO₂e).

In 2025, our surface access-related emissions (by colleagues and passengers) was 533,742tCO₂e, demonstrating a reduction of 29% compared to our 2019 baseline, and showing progress towards our target. This is a result of a combination of modal shift from private to public transport and average vehicle emissions reducing due to a gradual transition to newer, cleaner vehicles.

However, it is important to note that improvements in data quality and methodologies are expected to impact the way that surface access emissions are reported and therefore also perceived progress in achieving targets.

Figure 4.7: 2025 surface access carbon emissions



PUBLIC TRANSPORT CATCHMENT
FOR PASSENGERS

Our target is to expand our catchment area to bring 25% more people within a 1.5-hour public transport journey time of Heathrow and to increase the 3-hour catchment population by 12% – both by 2026. For monitoring purposes, we've set a maximum of one interchange to ensure journeys meet passenger requirements (speed, ease and trust).

Although the targets for both 1.5-hour and 3-hour catchments had already been achieved in 2023 and 2024 respectively, in 2025 we continued to see strong numbers.

Compared with the previously reported assessment, the 90-minute catchment reduced slightly from 10.5 million to 10.1 million people, while the 180-minute catchment increased from 21.3 million to 21.6 million. These changes are relatively modest and reflect timetable updates rather than major network changes.

The analysis identified improvements in accessibility in several areas, including around Oxford, Luton and Basingstoke for the 90-minute catchment, and around Swindon, Bath, Bournemouth and Cambridge within the 180-minute catchment. These gains were primarily driven by enhancements to coach services. Conversely, some areas experienced small reductions in accessibility, including Northampton, where changes to service stopping patterns affected connectivity, as well as parts of north and south London. Seasonal timetable adjustments, including rail retiming associated with winter operations, are also likely to have contributed to some of the observed changes.

Overall, the results demonstrate that Heathrow remains significantly ahead of its public transport catchment targets, with more than a third of England's population now able to reach the airport by public transport within three hours.

Figure 4.8: 2025 public transport catchment (number of people within 1.5-hour journey time of Heathrow) (based on Nov-25 transport timetable data)

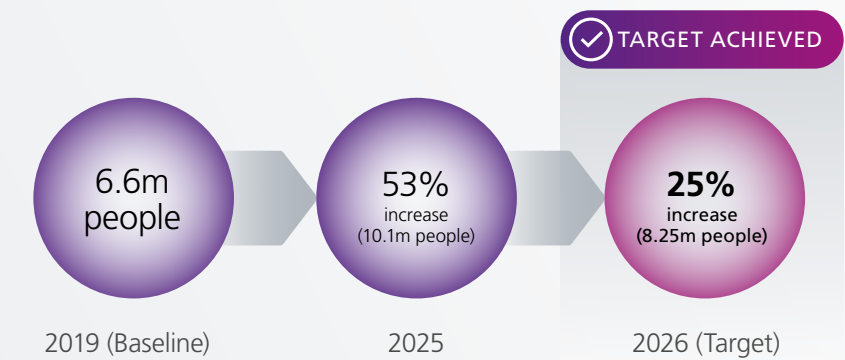
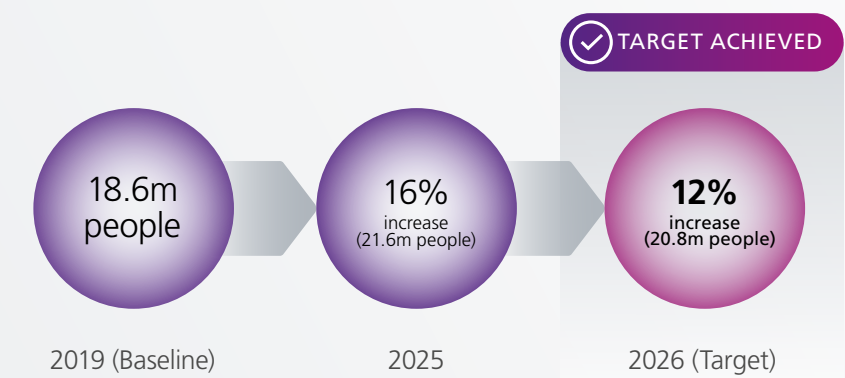


Figure 4.9: 2025 public transport catchment (number of people within 3-hour journey time of Heathrow)



IMPROVEMENTS TO SURFACE ACCESS IN 2025

This section sets out the improvements to Heathrow surface access that were implemented in 2025. These are separate from and in addition to the improvements set out in the Sustainable Travel Zone section of this report.

CENTRAL BUS STATION UPGRADE

Heathrow’s dedication to sustainable travel and public transport is exemplified by its decision to make a substantial investment of over £5 million to transform the Central Bus Station, which serves more than 6 million passengers annually (not including colleagues). This landmark project will significantly boost capacity, with the construction of four new coach bays designed primarily for triple-axle coaches, increasing coach capacity by 36%.

Passengers can look forward to an enhanced and reliable travel experience, thanks to improved signage, wayfinding, safe walking routes and a new centralised bus and coach display screen seven times larger than the current provision. The development of Consort Road and the expansion of the coach network will introduce new services, increased frequencies, and more destinations. This will strengthen connectivity and operational resilience, particularly during peak periods. Overall, these improvements will elevate the quality and efficiency of public transport at Heathrow, supporting the Sustainable Travel Zone and reaffirming Heathrow’s commitment to making public transport the preferred choice for passengers.

MOBILE DISPLAY UNITS IN THE CENTRAL TERMINAL AREA

As part of efforts to improve the passenger experience during disruption, a journey information clear message trail was introduced using three Mobile Digital Units (MDUs) in the Central Terminal Area (CTA).

Developed collaboratively with internal stakeholders, the MDUs were installed at key CTA subway locations to display real-time disruption information. This has helped passengers make informed journey choices from their departure terminal, reduced congestion in the subway, improved wayfinding, and supported a safer and more seamless journey for passengers.

Following a review of passenger usage data which showed clear operational benefits, the MDUs have now been permanently installed, with an agreed process in place to manage both ongoing and ad-hoc disruption updates.

ELECTRIC VEHICLE (EV) CHARGING HUBS

Heathrow’s Landside Zero Emissions Vehicle Strategy, published in 2023, outlines the approach the airport is taking to support EV transition for colleagues, passengers, transport partners and the supply chain. Rapid charging hubs provide the most efficient way of delivering access to electric vehicle charging facilities, and offsite charging stations are being designed, built and commissioned by third parties around the airport to support the eco-system.

Transport for London (TfL) has partnered with Fastned, an EV Charging Hub operator, to deliver a Rapid Charging Hub at Hatton Cross (in the east). This will improve access to charging infrastructure for the growing number of EV drivers in and around Heathrow. Work began on site in September 2025 and is planned to be delivered in Spring 2026.

ACADEMY RELATIONSHIP AND JOB CENTRE PLUS (JCP) PARTNERSHIP

As part of our work to increase awareness of Way2Go (our colleague sustainable commuting campaign) across Team Heathrow and encourage more sustainable commuting, we have built up strong working relationships with the Heathrow Academy and local JCP offices. In this way we have been able to effectively reach both new joiners and people considering a role at the airport and offer them travel information and advice. As a result, we hope to encourage colleagues to choose sustainable travel options from their first day at Heathrow.

WAY2GO OUTREACH AND TEAM HEATHROW (TH) BUSINESS ENGAGEMENT

57 Way2Go roadshow events were held across the Heathrow campus during 2025 to share and promote sustainable commuting information, including: bus and coach discounts; car sharing opportunities; and awareness of the Way2Go reward app. The reach of these events is estimated to be 3,000 colleagues.

Alongside this engagement directly with colleagues, we also carried out engagement activities with TH businesses. We met and interviewed seven TH organisations, representing over 9,000 airport colleagues, with the intention of better understanding the unique context, working patterns, challenges and opportunities of colleagues within these businesses. The outputs of this work helped to inform the Colleague Travel Engagement Plan and our communications strategy.





WAY2GO APP MEMBERSHIP GROWTH AND TFL CASE STUDY

The Way2Go app was trialled in 2023 and launched in January 2024. The app is open to all Team Heathrow colleagues and enables users to collect points for sustainable commute journeys. These points can then be exchanged for cash vouchers. In addition, periodic challenges and competitions are run within the app to increase engagement and encourage mode shift.

Over the course of 2025 the number of registered users grew from 2,831 in January to 5,259 (from over 175 different TH businesses) by the end of December. This represents an increase of nearly 86%, highlighting substantial growth over the period. Furthermore, in-app survey results show that colleagues enjoy using the app and there have been a notable number of new users who have been referred by existing users.

The 2025 in-app survey also showed that:

- 78% of users who did not already commute sustainably reported a change to the way that they travel to and from work
- 76% of respondents rated their experience of the app as ‘Very Good’ or ‘Good’
- 63% of respondents ‘Agreed’ or ‘Strongly Agreed’ that since downloading the Way2Go app their awareness of the STZ Colleague Guide has increased.

Tracked data analysis in 2025 estimates that 79% of the sustainable commutes recorded in the app directly replaced a car journey. This equates to 179,863 unique journeys and a CO₂ saving of 129,153 kgs.

In addition, we collaborated with TfL to produce a case study of the app and the impact it has had at Heathrow. This is now published and live on TfL’s website as an example of best practice for encouraging sustainable commuting.

Going forward, we are continuing to promote the app, monitor uptake and engagement, and, where required, modify our approach to utilising this tool to best encourage colleague mode shift to sustainable modes.

PROGRESS OF HEATHROW’S LOCAL CYCLING AND WALKING INFRASTRUCTURE PLAN (LCWIP) AND HEATHROW’S ACTIVE TRAVEL PORTFOLIO

The LCWIP⁸ (April 2023) continues to guide our focus and engagement with Local Authorities and Transport for London to deliver cycling and walking infrastructure around Heathrow. The proposed network is designed to improve active travel access to local residents and airport colleagues.

There has been good progress on the improvement of cycle parking facilities, active travel routes, colleague communications and engagement, and our close collaboration with Runway Cycling. Even though some infrastructure projects have had to be paused, the Heathrow Area Transport Forum remain engaged on Active Travel and are regularly updated on the progress of the LCWIP.

HEATHROW EXPRESS (HEX)

In 2025, HEX continued to contribute towards improving our passenger public transport mode share despite ongoing competition from the Elizabeth Line. HEX carried 4.54m passengers in 2025, a 4.4% increase on 2024 patronage (4.34m).

Heathrow Express maintained its high passenger satisfaction levels of 93.7% of passengers rating HEX as Excellent or Good throughout the year. HEX continues to offer a differentiated, reliable and high-quality service to passengers as the only direct non-stop air rail link between Heathrow Airport and Central London.

HEX extended their £10 advanced fare for passengers booking 30 days or more in advance of travel, as well as focussing on growing marketing and sales reach in the Middle East and Asia, with the aim to capture more of the passengers arriving at Heathrow. Free travel for passengers aged 15 and under remained in place to encourage families and groups to consider HEX as a sustainable alternative to private vehicles.

As well as targeting new markets, HEX delivered awareness marketing campaigns at US airports – targeting departure gates for Heathrow-bound flights. Furthermore, sustainable colleague commute journeys continue to be supported by the free travel offer available to HAL and HEX staff, and the 75% discount available to other Team Heathrow colleagues.

TACKLING NUISANCE PARKING AND AUTHORISED VEHICLE AREA (AVA) UPGRADES

As part of the efforts to tackle nuisance parking in the local area, Heathrow supported and provided funding for the implementation and enforcement of a new Public Space Protection Order (PSPO) that was put in place in May 2024 in Stanwell and Stanwell Moor in the Borough of Spelthorne. One year later, Hillingdon successfully rolled out their PSPO in May 2025. The PSPO covers the Heathrow Villages and was implemented following evidence of strong support during public consultation. Alongside new parking restrictions, a new reporting portal⁹ was also established, and the Heathrow Rangers carried out leafleting to local communities about this initiative. Further leafleting and comms to raise awareness of the AVA has also continued in 2025.

At the end of 2025 both Spelthorne and Hillingdon shared positive feedback and data on the success of the PSPOs, including a reduction of PHV (Private Hire Vehicle) nuisance parking and reduced littering.

Further to this, a survey was conducted in January 2025 to understand the needs and views of the PHV drivers who use the AVA. The survey findings have led to improvements across the AVA including upgraded catering, opening times and work to install new toilets. A trial for improved barrier access went live within the AVA over Summer and this was recognised by Uber and Uber drivers’ union. Floor signage including pedestrian crossings, directional arrows, and walkways were refreshed in June 2025.



The 2025 in-app survey also showed that:

78% 63%

of users who did not already commute sustainably reported a change to the way that they travel to and from work.

of respondents ‘Agreed’ or ‘Strongly Agreed’ that since downloading the Way2Go app their awareness of the STZ Colleague Guide has increased.

76%

of respondents rated their experience of the app as ‘Very Good’ or ‘Good’.

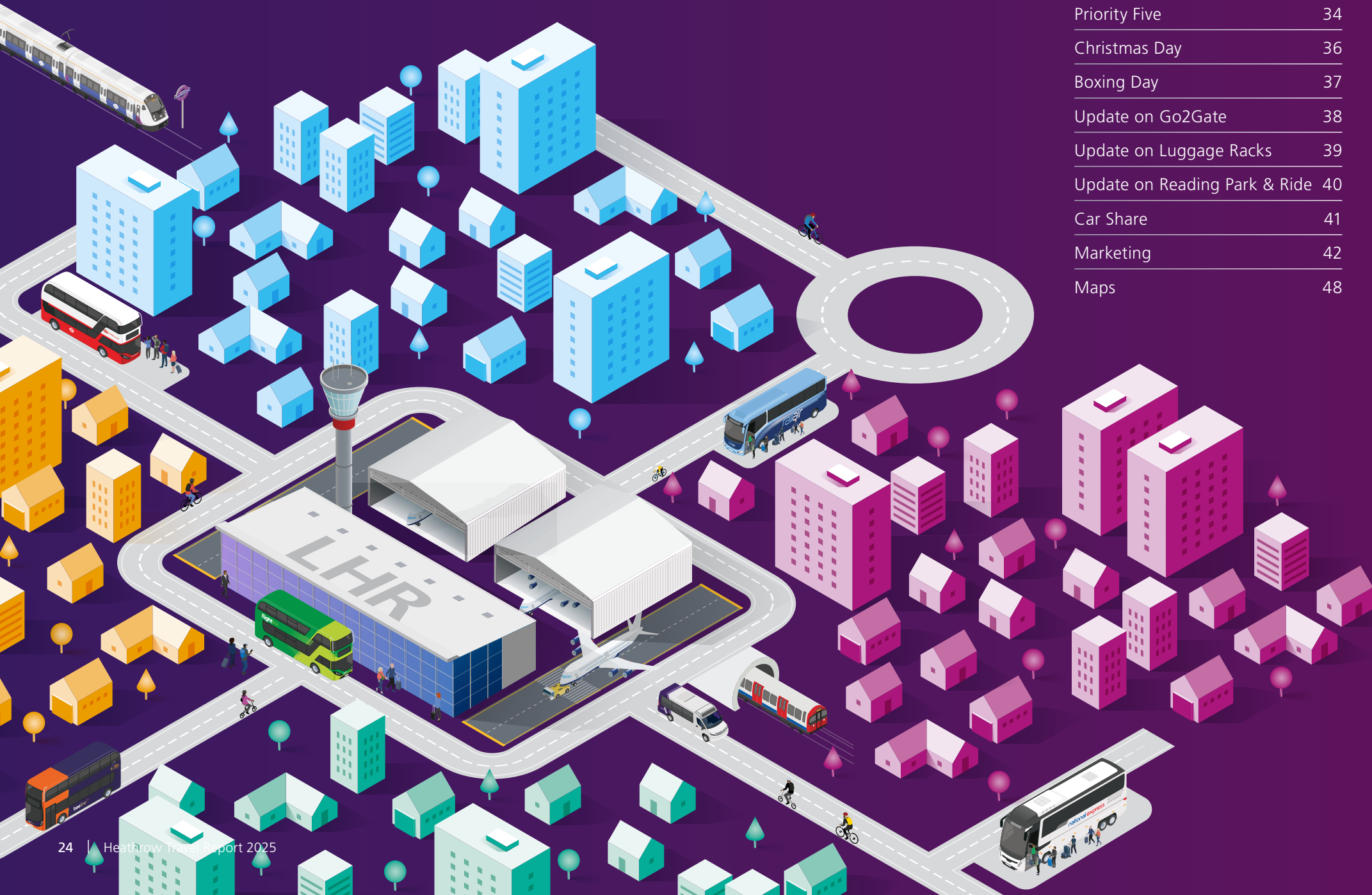
⁷ Modeshift demonstrators Heathrow Way2Go.

⁸ LCWIP
⁹ Report nuisance parking | Heathrow



SUSTAINABLE TRAVEL ZONE

2025
ANNUAL REPORT



INTRODUCTION

CONTENTS

Design Principles	26
Results	27
Priority One	28
Priority Two	30
Priority Three	31
Priority Four	32
Priority Five	34
Christmas Day	36
Boxing Day	37
Update on Go2Gate	38
Update on Luggage Racks	39
Update on Reading Park & Ride	40
Car Share	41
Marketing	42
Maps	48

Welcome to the 2025 Sustainable Travel Zone (STZ) Annual Report, providing a summary of the main changes during the year.

The STZ was introduced in January 2022 and is designed to encourage more passengers and colleagues to travel to and from the airport more sustainably.

2025 has seen a larger share of commercially driven improvements to the Heathrow bus and coach network compared with previous years. Our budget has been used to maintain existing supported services and improve frequencies where possible.



Increase in the total number of passengers boarding services 7, 8, 102, 442/X442, 703 and A4 at Heathrow (2025 compared with 2024). For other 2025 outcomes please see pages 22 and 23.

**N.B. These routes are the same as those used in the 2024 report introduction which enables a direct comparison.*

DESIGN PRINCIPLES

DATA LED

Interventions will be informed by knowledge of where colleagues live and need to travel to, current and past usage of services, and future local authority and service provider plans.

EFFECTIVE IN DELIVERING MODAL SHIFT AND RESULTING ENVIRONMENTAL BENEFITS

Measures will support a reduction in colleague single-occupancy vehicle trips through providing travel options that are affordable, safe, and convenient. Interventions will improve colleague wellbeing through more active travel and better journeys. Continuing to invest in the STZ will deliver environmental benefits, including improved air quality and reduced carbon output.

SCALABLE

The STZ will build incrementally to meet agreed targets for surface access, and to cater for the increasing number of people travelling to and from Heathrow.

EASY TO USE

We will ensure colleagues can find out how to travel more sustainably through provision of apps, physical and online signage, branding, information and promotion.

EQUITABLE

Interventions will provide a fair system of support, based on distance and deprivation in communities served, and will be designed to provide all airport colleagues living within easy commuting distance with an affordable journey to work.

If we provide public transport that meets the needs of colleagues, we will also deliver viable public transport for Heathrow's passengers travelling from those areas.

Progress against the five STZ priorities are set out in the following section.

RESULTS

Monitoring the performance of the services introduced with Heathrow's financial support as part of the STZ is very important. It is important to ensure that Heathrow's investment in sustainable travel is representing value for money.

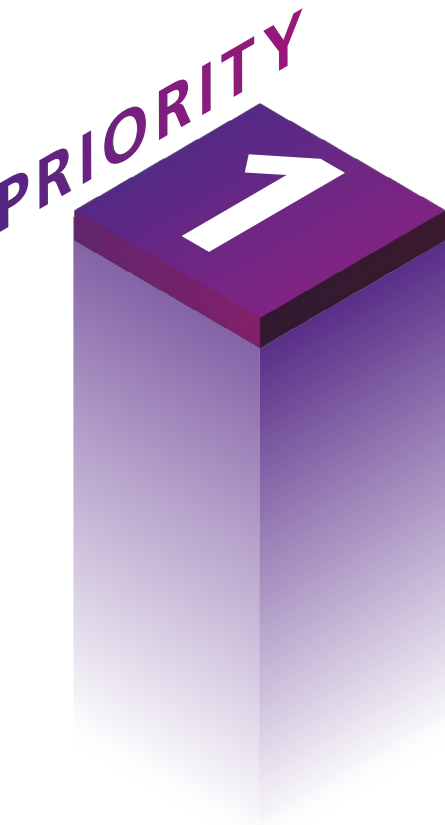
One of the ways performance is measured is through patronage growth. The table below shows the services receiving the most support and the year-on-year growth compared with 2024.

- Passengers boarding at Heathrow (this is our standard data criteria for consistency)
- Total passengers (it is assumed that most journeys are airport related)
- Towards Heathrow only (as Heathrow doesn't pay for the return journey from Heathrow to London Victoria)

Route	Growth in 2024 compared with 2023	Growth in 2025 compared with 2024	New/removed services
724/725	30.3%	-0.2%	725 commenced 2025
442/X442	50.0%	17.2%	
102	122.1%	51.6%	
A4	51.6%	3.2%	
RA1	15.9%	6.4%	
RA2	33.1%	-5.3%	
RA3*	95.0%	17.2%	
H21*	117.5%	47.2%	
N30*	75.5%	5.4%	
N40		44.0%	Commenced 2025
A30	-11.0%		Ended 2025
A40	19.1%	41.2%	
730*	294.7%	47.8%	
5*	40.0%	5.6%	
703	47.2%	4.3%	
Go2Gate*	106.4%	35.4%	

For commercial reasons, percentages are shown rather than absolute numbers.
*Where full year data isn't available, a direct comparison of corresponding months where the full data is available has been taken.





Ensure public transport operates at the times required by all colleagues. Many colleagues work early or late shifts which start or end at times when public transport is traditionally not always an option.

Each year we show the changes to public transport arriving at Heathrow before 04:00 and departing after 23:00. We include any route which serves local areas at frequent intervals (approximately hourly or better) with journey times of an hour or less, making them ideal for commuting.

There are now very few services which do not operate to and from Heathrow at the times required. Where they do exist, there are usually parallel services providing these important journeys.

This year we have successfully added an earlier service on Heathrow Express to meet the needs of more passengers and colleagues.

Date	Service	Description
18 May	Heathrow Express	Earlier journey from Paddington at 04:34 on Mondays to Saturdays and 04:55 on Sundays and Public Holidays.

There is now public transport operating to Heathrow before 04:00 and departing Heathrow after 23:00 serving most local areas. A summary of the alternative early and late travel options for the few bus and coach services which do not yet run at these times is shown below.

Service	Days of operation	Locations served	Alternatives from these locations
7X	Mondays to Fridays	Britwell Slough Town Centre Langley Brands Hill	7 5, 7, 703, A4 7, 703, A4 7, 703, A4
8	Daily	Slough Windsor Old Windsor Englefield Green Egham Staines	5, 7, 703, A4 703, Go2Gate No alternatives 442 442 442, X442
704	Mondays to Saturdays	Maidenhead Taplow Slough (Bath Road) Slough Town Centre Langley Brands Hill	RA1 (am), trains from Slough (pm) RA1 (am), trains from Slough (pm) A4 5, 7, 703, A4 7, 703, A4 7, 703, A4
A60	Daily (am only)	Sunnymeads Wraysbury Horton Road	Trains from Staines (pm) Trains from Staines (pm) 5

Many areas also benefit from services operating throughout the night, and most other services operate with only a short gap between 1am and 4am.

24-hour services	Overnight services
105, 111, 285, 703 ⁴ , 724, A4	N9, N30, N40, N140, N555

⁴ part of the route only

PRIORITY

2

Improve active travel options for those living close enough to walk or cycle.

Following the publication of the Heathrow Local Cycling and Walking Infrastructure Plan in April 2023, we continue to engage with our Local Authorities and Transport for London to ensure delivery of these routes into Heathrow from surrounding areas. The proposed improvements will not only benefit Team Heathrow colleagues but also residents in the local areas.

The Heathrow Cycle Hub continues to provide a bespoke service to Team Heathrow colleagues, as well as being accessible to the public. Staff are on hand to support with cycling enquiries, bike repairs, and free servicing for Team Heathrow. A weekly roadshow at Cargo Centre is provided, and they are always ready to provide great advice and support when looking to buy a bike.

UPDATES ON CYCLING INFRASTRUCTURE

In the previous STZ report, we reported progress for both cycling into Terminals 2 and 3 and the Southern Perimeter Road between Terminal 4 and Cargo Centre. Unfortunately, the projects experienced significant cost increases to ensure lighting compliance and removal of street furniture. Changing any lighting requires significant additional utilities work. Following extensive alternative optioneering, stakeholder engagement (including with Heathrow Area Transport Forum) and numerous workshops and meetings with designers, it was not possible to secure funding to continue the projects through Heathrow’s regulatory governance process. The decision has therefore regrettably been made to stop both projects.

Looking ahead, works are currently underway to provide secure cycle hubs around the Heathrow perimeter in locations close to existing bus and London Underground routes into Terminals 2 & 3. The Way2Go campaign continues to increase colleague awareness of Runway Cycling – Heathrow’s dedicated cycle shop to support those who choose to cycle. Work is also underway to explore how best to provide the desired active travel infrastructure as part of Heathrow’s expansion plans.

PRIORITY

3

Improve campus connectivity by ensuring free, easy to use sustainable travel options are available to colleagues needing to travel around the airport during the working day, and for the first and last mile of commutes.

Passengers and colleagues can travel for free between Heathrow terminals on trains and the Underground. Trains link all terminals every day of the year, including Christmas Day.

In 2022, we extended free travel to include Hatton Cross Underground Station and introduced the early morning H30 free bus, linking the four Underground stations at the airport before the first Tube services commence. The H30 was improved in August 2023 to operate between Terminal 4 and Terminal 5 throughout the day.

Team Heathrow colleagues can also travel for free on a selection of other services. For more details, see the Team Heathrow Free Travel Map at the back of this report.

Changes to campus connectivity for 2025 are shown below.

H5X BUS TIMETABLE INFORMATION



01/25

Free for Team Heathrow!

Hop on and show your Team Heathrow ID.

WAY 2 GO

Marketing for the free H5X service



Free staff shuttle between Compass Centre and Terminal 5

Date	Service	Description
1 Jan	H5X	Free travel for Team Heathrow introduced between The Renaissance Hotel and Terminal 5, providing a service every 30 minutes from early until late on all days of the week, including Christmas Day.
24 Mar	Staff bus	Timetable improvement to the free colleague bus between Compass Centre and Terminal 5 on Mondays to Fridays, with the frequency increased from every 20 mins to every 10 mins between 08:00-09:00 and 16:00-17:00.
25 Dec	H31	Service approximately every hour on Christmas Day between 05:00 and 23:00, providing links to Harlington Corner, Eastern Perimeter Road, Hatton Cross, and Cargo from Terminals 2, 3 and 4, due to the absence of TfL services on this day. The service was free for Team Heathrow.



Encourage public transport operators to provide discounted tickets for Team Heathrow colleagues for use on services where stops are within easy commuting distance.

No additional discounts were introduced during 2025. Below is a summary of all discounts and free travel options for Team Heathrow.

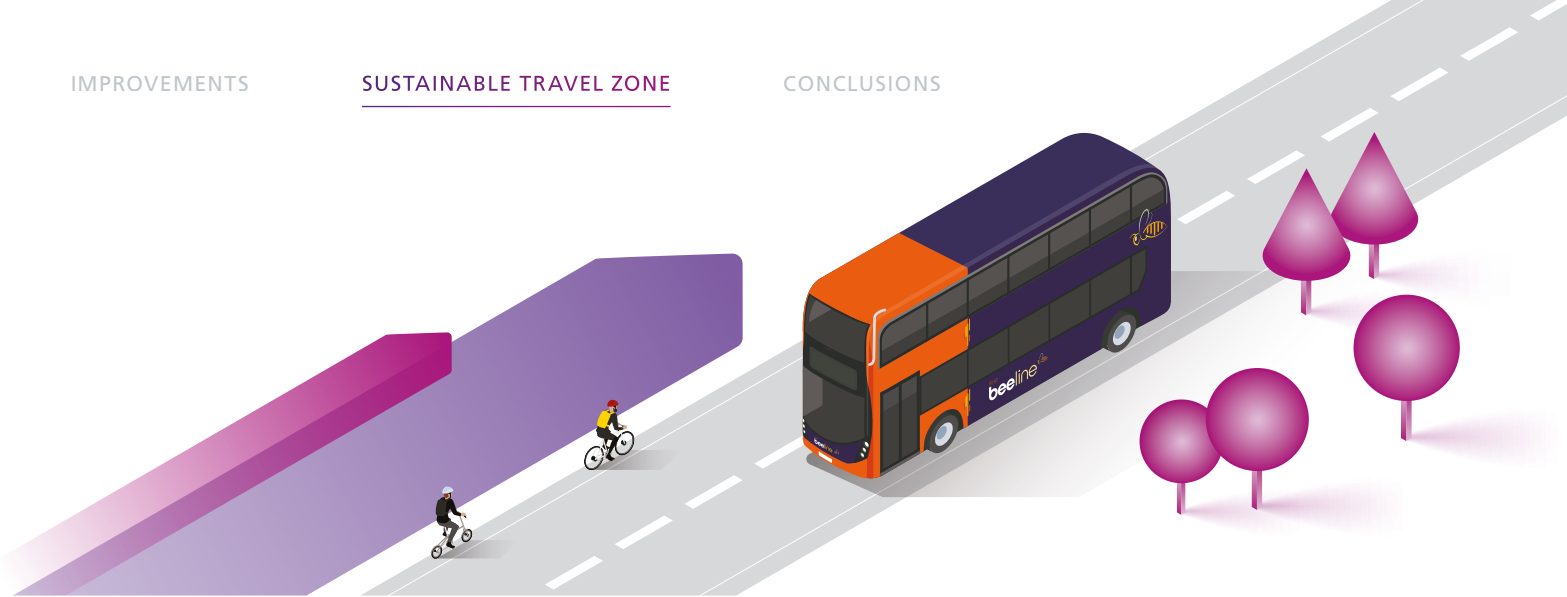
2025 DISCOUNTS AND FREE TRAVEL OPTIONS FOR TEAM HEATHROW

Service	Single tickets	Return tickets	10/12-trip tickets	28 day/month tickets	Annual tickets
5	x	x	x	✔	x
7	x	x	✔	✔	x
8	x	x	✔	✔	x
102	x	x	✔	✔	✔
442	x	x	✔	✔	x
446	x	x	✔	✔	x
555	x	x	✔	✔	x
703	x	x	x	✔	x
724	x	x	x	✔	✔
730/1	x	x	✔ (5 x day tickets)	✔	x
A4	x	x	✔	✔	x
Go2Gate	✔	x	x	x	x
Hotel Hoppa	✔	✔	x	x	x
N555	x	x	x	✔ (555 accepted)	x
National Express	✔	✔	x	x	x
RailAir RA1, RA2, RA3	x	x	✔	x	x
The Airline	x	x	✔	x	x
X442	x	x	✔	✔	x
Heathrow Express	✔	✔	✔	x	x

THE FOLLOWING IS AVAILABLE TO DIRECT EMPLOYEES OF HEATHROW AIRPORT LIMITED

Service	Single tickets	Return tickets	Week tickets	28 day/month tickets	Annual tickets
Elizabeth line	✔	✔	✔	✔	✔

Services without any Team Heathrow discounts: 105, 111, 278, 285, 350, 423, 482, 490, A10, N9, N140, SL7, SL9, U3, and the Piccadilly line.



FREE TRAVEL IS AVAILABLE TO TEAM HEATHROW ON THE FOLLOWING SERVICES

Service	Description of free travel
7	Terminal 5 to Central Bus Station (early morning journey).
A4	Compass Centre to Central Bus Station.
A60	Whole route (early morning journeys).
H31	Whole route (Christmas Day only).
RA1 (RailAir)	Reading, Twyford, Maidenhead, and Taplow to Heathrow on the 02:40 and 03:40 journeys from Reading.
N30	Any journeys wholly within Heathrow (Central Bus Station and Hatton Cross).
N40	Any journeys wholly within Heathrow (Central Bus Station and Hatton Cross).
N555	Any journeys wholly within Heathrow (Central Bus Station and Scylla Road).
H5X (Hotel Hoppa)	Terminal 5 to Renaissance Hotel.
H2X (Hotel Hoppa)	Terminals 2 and 3 to Renaissance Hotel.
Staff buses	Compass Centre to T5, car park N1 to T5, car park N4 to T2/3, car park N5 to T5, car park PEx to T2/3, car park S1 to T4.

FREE TRAVEL IS AVAILABLE TO ANYBODY ON THE FOLLOWING SERVICES

Service	Description of free travel
H30	Whole route.
Elizabeth line	Between terminals.
Heathrow Express	Between terminals.
Piccadilly line	Between terminals, plus journeys between terminals and Hatton Cross.

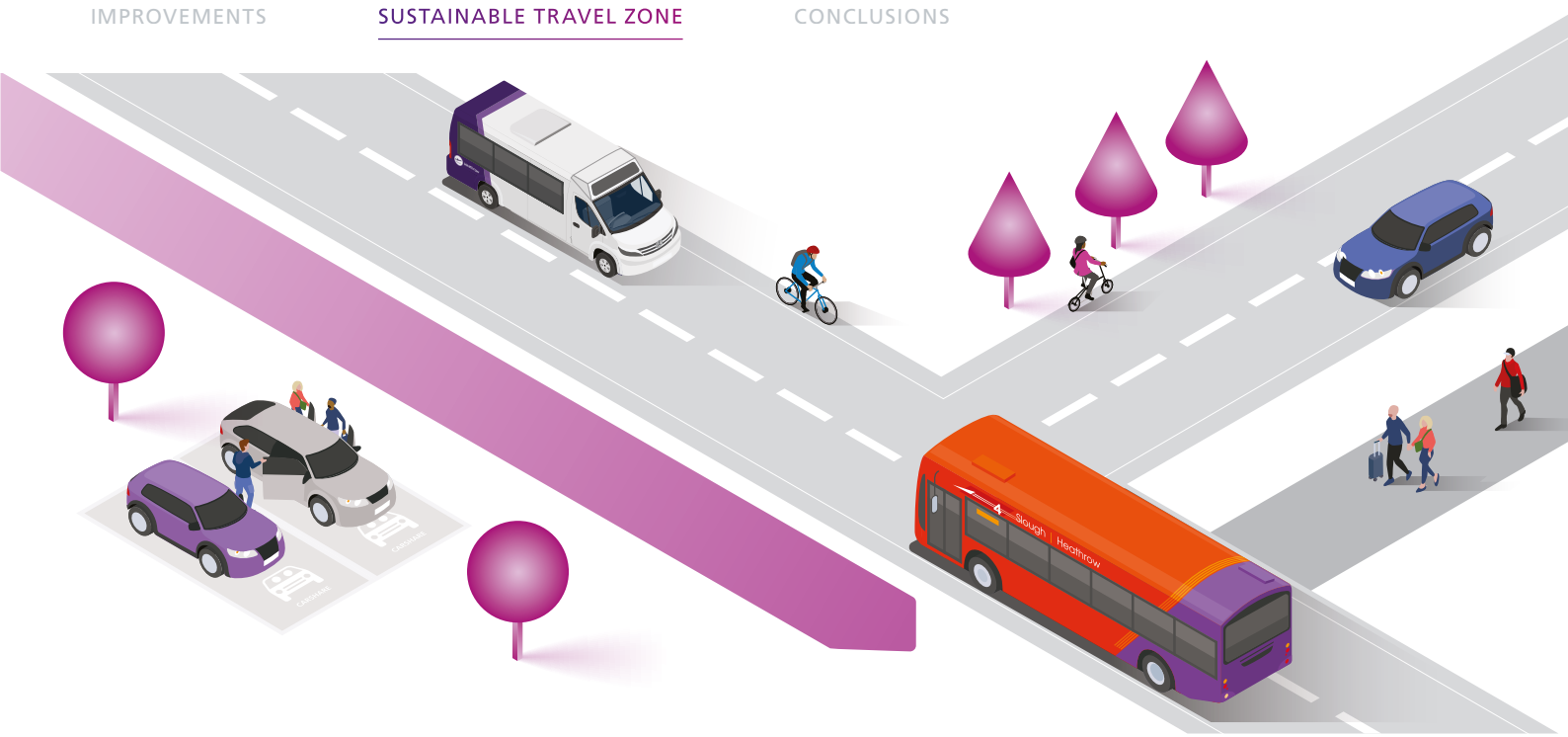
We classify Team Heathrow as anybody with a Heathrow ID (the passes issued by, or on behalf of, the Heathrow ID Centre).



Introduce new public transport options to serve new areas or improve the service on existing routes (e.g. increased frequencies).

SERVICE CHANGES DURING 2025

Date	Service	Description
6/1/25	N30	Extra journey introduced from Acton on Mondays to Fridays to improve punctuality due to lots of passengers.
19/1/25	RA1	Adjusted to serve Winnersh Triangle Park & Ride site instead of Thames Valley Park.
1/3/25	446 [†]	Frequency increased from every 60 mins to every 30 mins on Mondays to Fridays, except Public Holidays.
13/3/25	920 [†]	New Flixbus service introduced from Birmingham and Gatwick.
31/3/25	920 [†]	Additional journeys introduced by Flixbus.
17/4/25	210 [†]	Additional journeys from Birmingham introduced by National Express.
17/4/25	409 [†]	Service diverted via Heathrow to create a new link from Aberystwyth.
17/4/25	550 [†]	Services diverted via Heathrow to provide more journeys from Liverpool.
17/4/25	900 [†]	New Flixbus service introduced from Leicester and Gatwick.
17/4/25	940 [†]	Additional journeys introduced by Flixbus.
17/4/25	044 [†]	New Flixbus service introduced from Gloucester.
15/5/25	043 [†]	New Flixbus service introduced from Bath.
15/5/25	061 [†]	New Flixbus service introduced from Poole.
2/6/25	704 [†]	New Thames Valley Buses service from Maidenhead.
12/6/25	900 [†]	Additional journeys introduced by Flixbus.
29/6/25	940 [†]	Additional journeys introduced by Flixbus.
4/7/25	032 [†]	All journeys diverted to serve Heathrow, significantly increasing the number of coaches from Southampton.
4/7/25	035 [†]	More journeys diverted to serve Heathrow, significantly increasing the frequency of coaches from parts of Dorset and reducing the journey time.



Date	Service	Description
4/7/25	205 [†]	Service replaced by the 032 and 035.
5/7/25	209 [†]	New National Express overnight service to Bristol.
14/7/25	043 [†]	Additional journeys introduced by Flixbus.
14/7/25	707 [†]	National Express service withdrawn to Birmingham via Luton.
27/7/25	725	Service extended from Rickmansworth to Heathrow, doubling the number of buses for most of the day when combined with service 724.
4/8/25	555	Frequency increased from every 60 mins to every 30 mins on all days of the week. All journeys now terminate at Hatton Cross Station where free travel on the Underground is available to all terminals.
Exact date unknown	N10/XN10	New overnight services to/from Glasgow and Edinburgh, with the northbound N10 service also calling at Middlesborough, Sunderland, and Newcastle upon Tyne.
1/9/25	X442	Additional journeys introduced by Carlone to fill some gaps.
1/9/25	940 [†]	Two trips each way withdrawn by Flixbus.
6/9/25	H25 [†]	Frequency increased to every 12 mins on all days of the week.
4/10/25	N9 [†]	Frequency increased from every 30 mins to every 20 mins on Sunday nights to Thursday nights.
2/11/25	703 [†]	The school day journeys via Datchet withdrawn, increasing the number of journeys via Slough and Langley.
3/11/25	990 [†]	New Flixbus service introduced from Swindon and Cambridge.
7/12/25	7	Adjusted timetable with a reduction in daytime frequency on Mondays to Fridays from every 20 mins to every 30 mins.
7/12/25	7X	New First Bus service from Britwell to Heathrow Central Bus Station operating every 30 minutes on Mondays to Fridays.

[†] Introduced without Heathrow's financial support but included as they form an important part of the Sustainable Travel Zone

CHRISTMAS DAY

A new addition for Christmas Day 2025 was the operation of route 111 between Heathrow Central and Hanworth Road (Godfrey Way). The 111 is a TfL service, but TfL doesn't operate any buses on Christmas Day. After discussions with TfL, Heathrow tendered the service for one day only and Carousel Buses won the contract using double-deckers, including several Flightline vehicles with large luggage racks.

The table above shows the number of passengers on the Christmas Day services receiving Heathrow's financial support.



Photo courtesy of Terry Wong Min

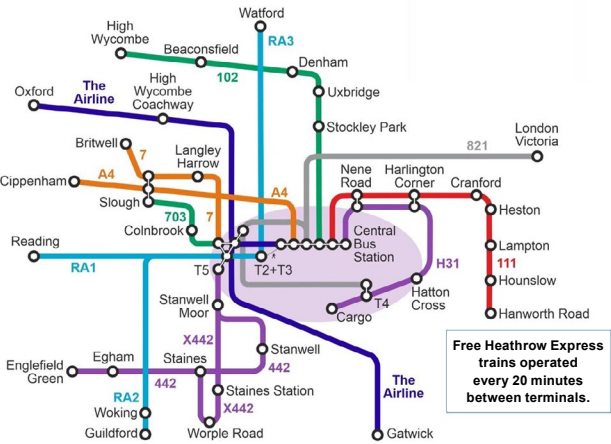
PATRONAGE ON CHRISTMAS DAY SERVICES

25-Dec	Locations served from Heathrow	2022	2023	% growth	2024	% growth	2025	% growth
102	High Wycombe, Beaconsfield, Gerrards Cross						341	n/a
111	Hounslow, Heston, Cranford						431	n/a
442/X442	Staines, Stanwell, Stanwell Moor		72	n/a	117	62.5%	186	59.0%
703	Slough, Colnbrook	46	246	434.8%	307	24.8%	367	19.5%
H31	Hatton Cross		71	n/a	80	12.7%	111	38.8%

Other services operated commercially on Christmas Day. Heathrow Express trains provided free connections between terminals every 20 minutes.

CHRISTMAS DAY 2025 SERVICE MAP

National Express operated the 821 frequently between London Victoria and Heathrow on Christmas Day. They operated other coach services, and Flixbus also operated several of their services.



BOXING DAY

Most bus and coach services operated a Sunday service on Boxing Day, but some early morning journeys did not operate. Special timetables operated on the 102, 442/X442, and the 724/725 with Heathrow's financial support (see table, showing passenger numbers).

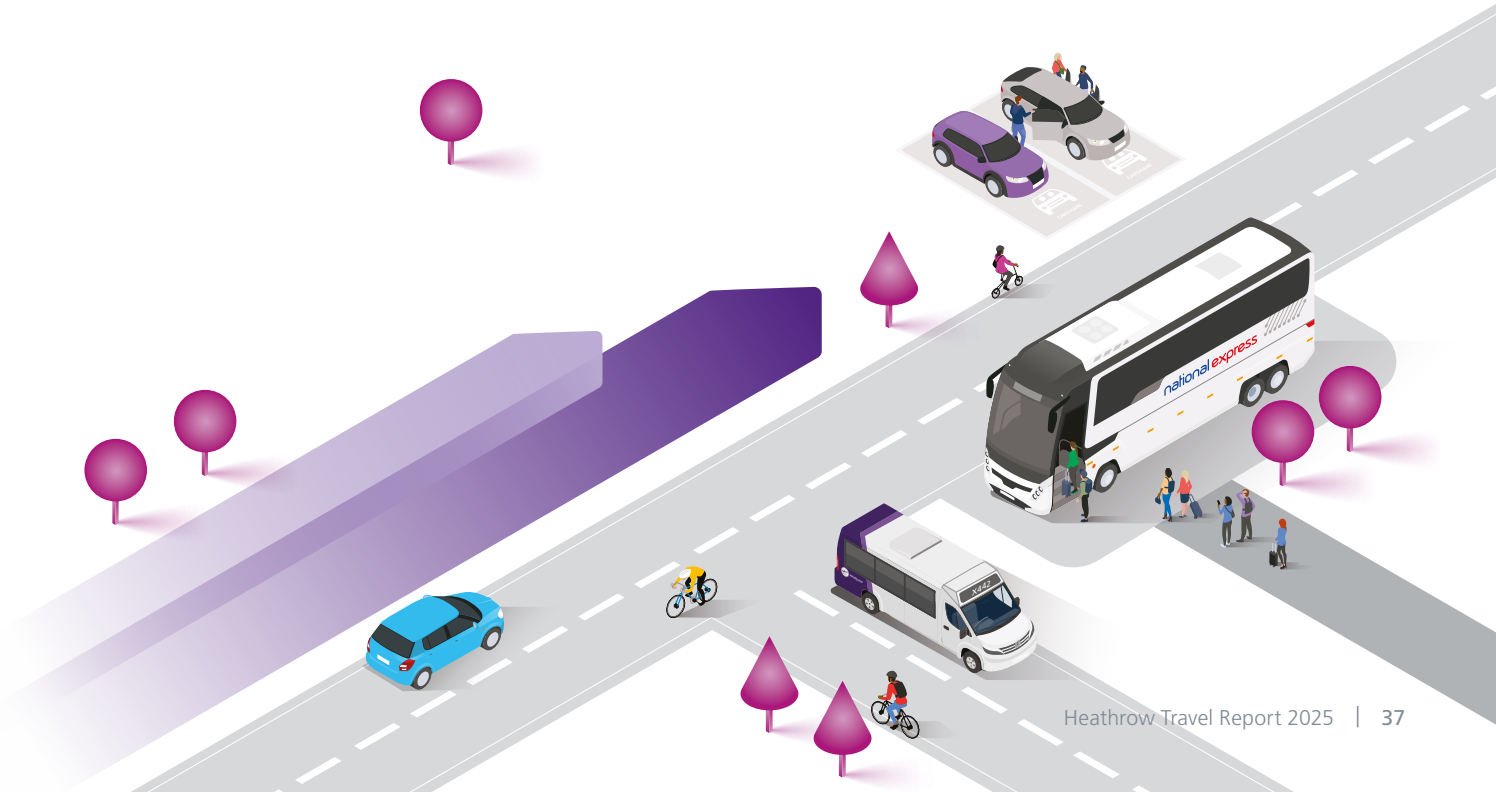
PATRONAGE ON BOXING DAY SERVICES

26-Dec	Locations served from Heathrow	2022	2023	% growth	2024	% growth	2025	% growth
102	High Wycombe, Beaconsfield, Gerrards Cross		624	n/a	1022	63.8%	1031	0.9%
442/X442	Staines, Stanwell, Stanwell Moor	186	301	61.8%	290	-3.7%	391	34.8%
724 (2024) 725 (2025)	Watford, Rickmansworth, Denham, Uxbridge				280	n/a	208	-25.7%

This year the 102 was supplemented between Uxbridge and High Wycombe by route 103, which explains why the patronage growth was only 0.9%.

Arriva operated the 725 every 2 hours between Watford Junction and Heathrow, instead of the hourly service provided by Carousel in 2024. This reduction in frequency will be the reason why patronage was lower this year.

Heathrow's only local bus services not operating on Boxing Day were the 7X, 446, 555, 704, N30 and N40.



UPDATE ON GO2GATE

Go2Gate is Heathrow’s trial of on-demand public transport, which can only be booked online using the Go2Gate App (see the 2023 STZ Annual Report for more about the trial).

Patronage in 2025 was 35.4% higher than in 2024, and the percentage of passengers arriving within 5 minutes of their booked time was an average of 96% across the year. Feedback received from passengers rated the service an average of 9.9 out of 10.

It is noteworthy that despite a 20% fare increase in January 2025 to £6 single, it was never mentioned in the feedback received. This is a positive indicator for the Go2Gate considering that all other local bus services in the Windsor area participate in the Government’s Bus Fare Cap (maximum fare of £3 throughout 2025). This suggests that the majority of Go2Gate’s users are not regular users of other local bus services in the Dedworth area and would normally default to taxis if travelling to/from Heathrow.



Great service, highly recommend using this route and reliabe transport service.

I love this little bus! Great driver and great ride, straight to the end of our road.

Excellent journey, great driver, polite and safe driving and reached LHR before time!



Superb service.

Lovely driver, updating on traffic to expect on way home which will delay us slightly due to family day at Windsor Racecourse. Polite and friendly too.

Most of the negative comments received were regarding the inability to board an earlier bus if they arrive earlier than anticipated at Terminal 5, which unfortunately cannot be avoided in order to comply with the rules stipulated by the Department for Transport for flexible bus services.

Regular feedback has also started to be received from passengers who had to travel ‘in the wrong direction’ to pick up or set down other users. This is the result of the service’s growing popularity and the ability to book as little as 10 minutes in advance. Once a route has been created by the software, the driver must follow it, which means any last-minute bookings need to fit around existing bookings (as pick-up times cannot be brought forward once confirmed). It also means that some last-minute bookings require a short walk to another location (where the bus can pick them up without adding significantly to the total journey time).

Lastly, regular requests were received for additional stops in Dedworth, mostly in Maidenhead Road – the possibility of delivering this in 2026 is being investigated.



Go2Gate at Terminal 5

UPDATE ON LUGGAGE RACKS

Bus and coach users at Heathrow will often have large items of luggage.

They should not feel like they are an inconvenience, so the provision of luggage storage is essential if we are to encourage even more people to switch from less sustainable modes.

Agreement was reached in 2025 to install luggage racks on the new buses being built for routes 446 and 555. These will be introduced in 2026.

STATUS OF LUGGAGE RACKS AVAILABLE BY SERVICE

All vehicles regularly used have luggage racks	Some vehicles have luggage racks	Plan to fit luggage racks to all vehicles regularly used	Services without any luggage racks fitted
Flightline 102, Flightline 703, Flightline 730/1, Flixbus, Go2Gate, H30, Hotel Hoppa, N30, N40, N555, National Express, RailAir RA1/2/3, Superloop SL7, The Airline.	7, 7X, A4, 704	A4, 446, 555, 704, 724, 725	5, 8, 105, 111, 278, 285, 350, 423, 442, 446, 482, 490, 555, 724, 725, A10, A60, H21, N9, N140, Superloop SL9, U3, X442.



A typical view at Terminal 5 with many passengers boarding a 703 service with flight luggage



Air passengers occupying the buggy and wheelchair areas due to the absence of a dedicated space for cases and large bags



The luggage rack on a 703 vehicle after the first few passengers have boarded.

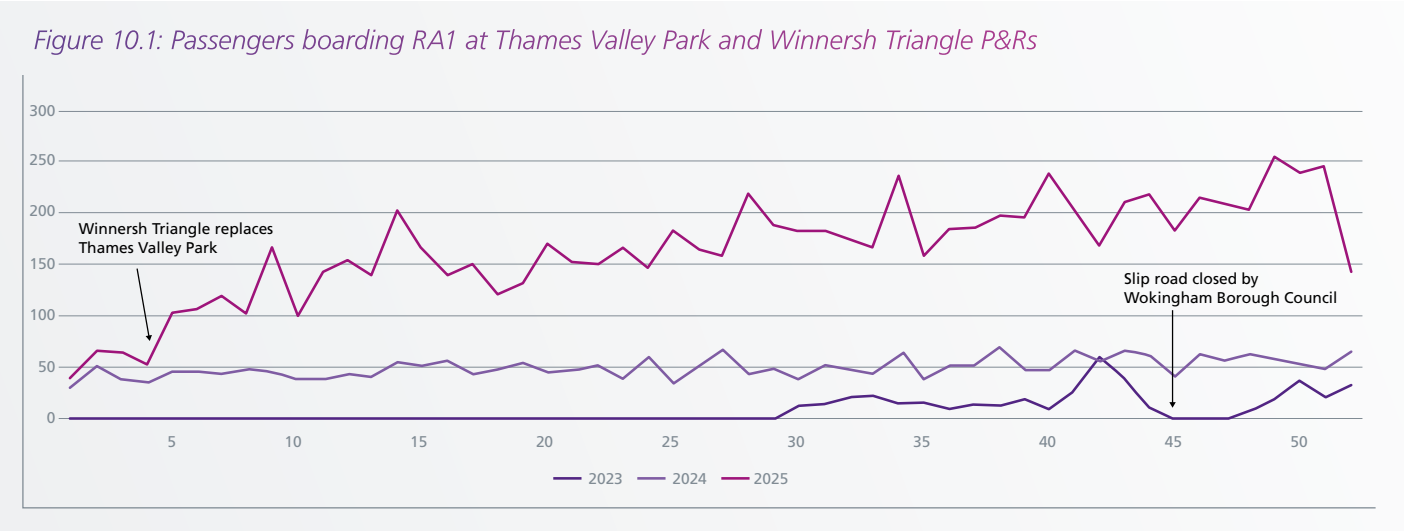
UPDATE ON READING PARK & RIDE

In the 2023 STZ Annual Report we highlighted the introduction of a new Park & Ride (P&R) facility at Thames Valley Park (just off the A3290 in Reading) where coaches on the RailAir RA1 called in on their way to and from Heathrow.

The location was agreed with Wokingham Borough Council because our preferred P&R site at Winnersh Triangle was still closed following the pandemic. This was the second Park & Ride facility following the success of the one at Handy Cross in High Wycombe which continues to perform well.

We are pleased to report that in January 2025 the RA1 was able to switch to Winnersh Triangle, following the council's reopening of the P&R site a few months earlier. The site is right next to Winnersh Triangle Business Park, is adjacent to Winnersh Triangle Railway Station (for trains to/from Winnersh and Wokingham), and is within easy walking distance from three hotels. It has 487 parking spaces for cars (including some with electric charging points), 8 spaces for motorcycles, and storage for cycles too. Just like at Thames Valley Park, Team Heathrow colleagues benefit from free parking for up to 96 hours. Other users can park for up to five days and pay just £5 for each 24-hour period (starting from midnight).

The sudden jump in patronage growth from this date demonstrates the success of this decision.



CAR SHARE

In 2025, 9,387 car share journeys were authenticated.

This was equivalent to 71.12 tonnes of CO₂e saved and over 361,932 miles saved. In addition, £525 in high street vouchers were given as prizes for Car Sharers who validated their journeys and 117 Club Pret voucher codes (for 50% off 5 drinks a day for a month) were awarded to the top 20 validators each month.

The app was restricted to existing members from June for the remainder of the year, while a data protection audit was undertaken and the required updates were implemented to improve the security of member data in the app.

A comprehensive communication plan was implemented to maintain interest in car sharing amongst potential new members. The Way2Go app was able to continue to allow journey validations and reward car sharing during this time for any colleagues wishing to share until they could register in early 2026.



Download and register the Mobilityways app.*

*existing members will need to redownload the Mobilityways app.

1 Register for Liftshare

2 Select your Team Heathrow community

3 Add your journey details

4 Find your matches

5 Download your permit

6 Validate your journey

liftshare

travel happy

mobilityways

WAY 2 GO

Available for Team Heathrow

Car Share for a better Way2Go

Find out more at: heathrow.com/commuter



MARKETING

The RailAir coach advertising in Reading described in the 2024 Annual Report continued into 2025. The campaign included mega-rear adverts on five vehicles in the Reading Buses fleet and posters on the platforms at Reading Station.



RailAir coach at Reading Station



Coach advertising took place in Reading, Slough, Cardiff, Newport, Coventry, and Birmingham including the use of dynamic bus shelter displays showing live times of the next coach departure to Heathrow.



First Bus complemented this with posters on the platforms at Reading Station



The RailAir coach from Watford was promoted in 2025 using two 48-sheet posters at Watford Junction Station



Signs on the platforms and ticket barriers at Slough Station were introduced in 2025, highlighting the good bus links to Heathrow.



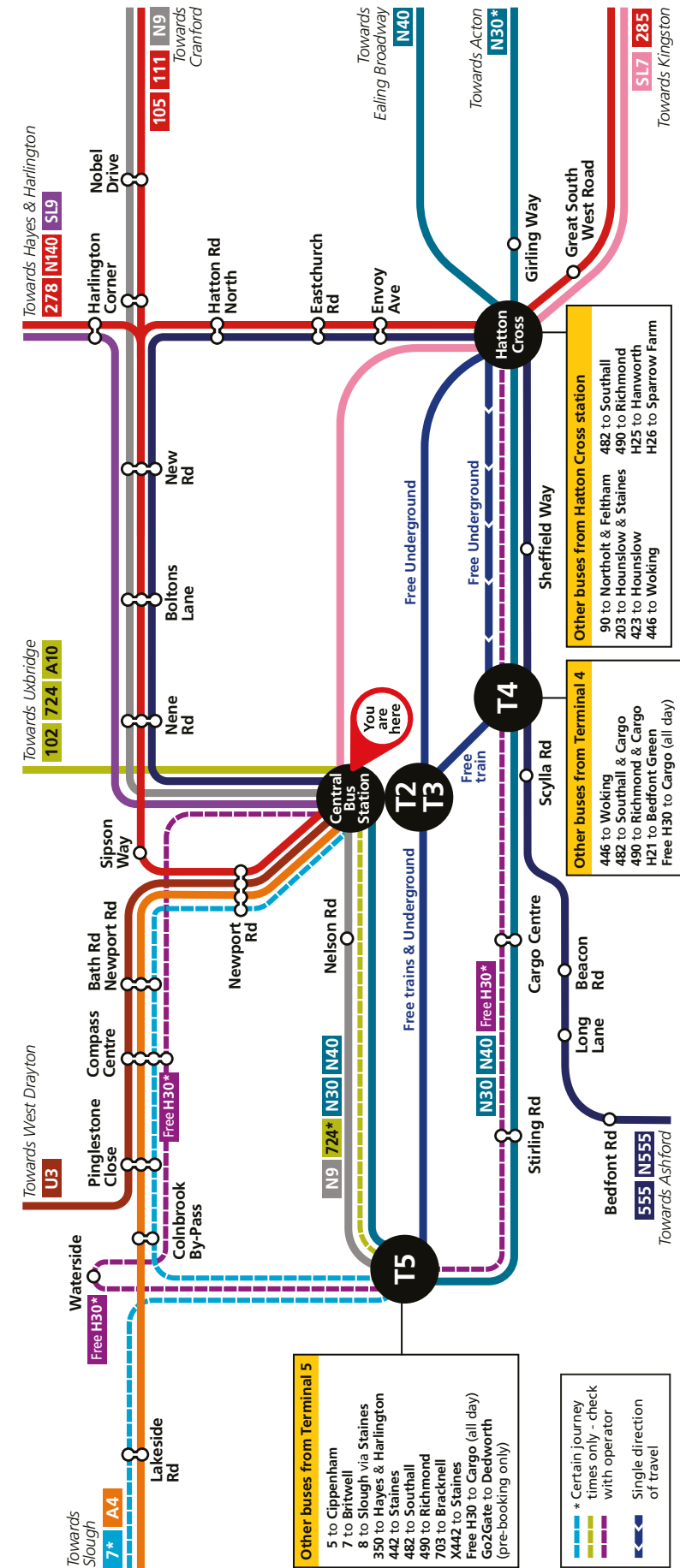


MARKETING COLLEAGUE FOCUSSED

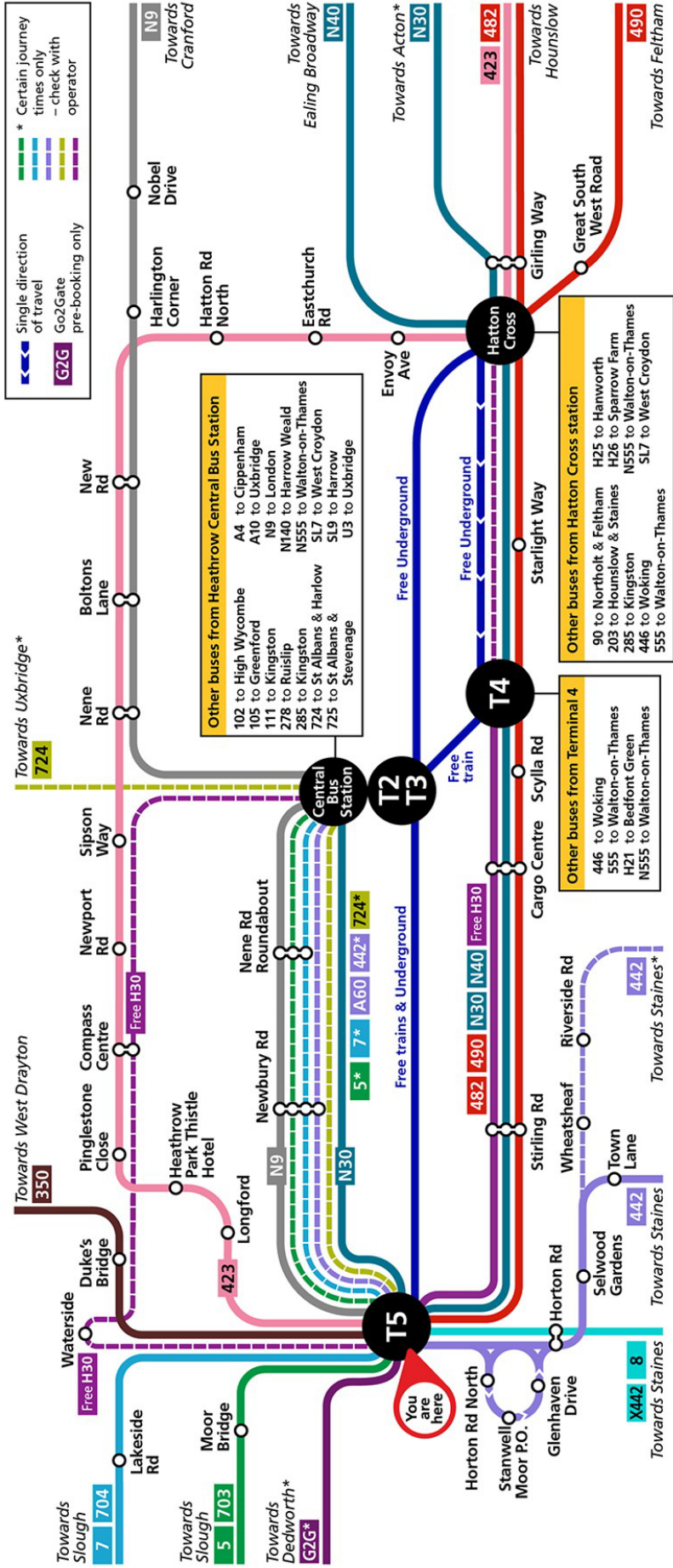
Our team continued promoting the various ways of travelling more sustainably at 57 Way2Go roadshows across the airport (both landside and airside) – these included business-specific and safety events. Engagement sessions were held with seven Team Heathrow businesses in summer which expanded the team’s reach to over 12,000 airport colleagues.

As a result of roadshows, business engagement and associated promotions, an additional 2,428 Team Heathrow colleagues registered on the Way2Go reward app.

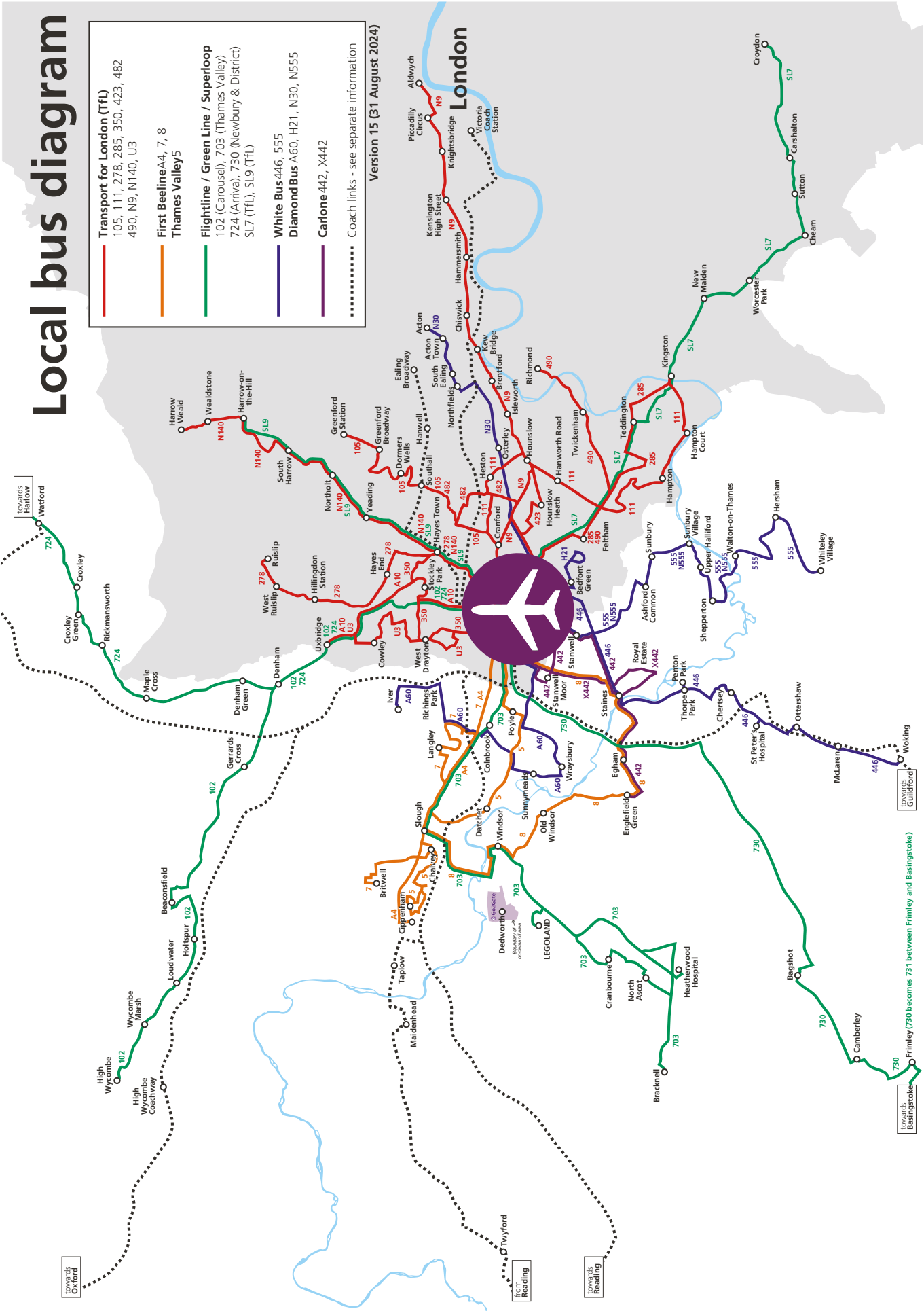


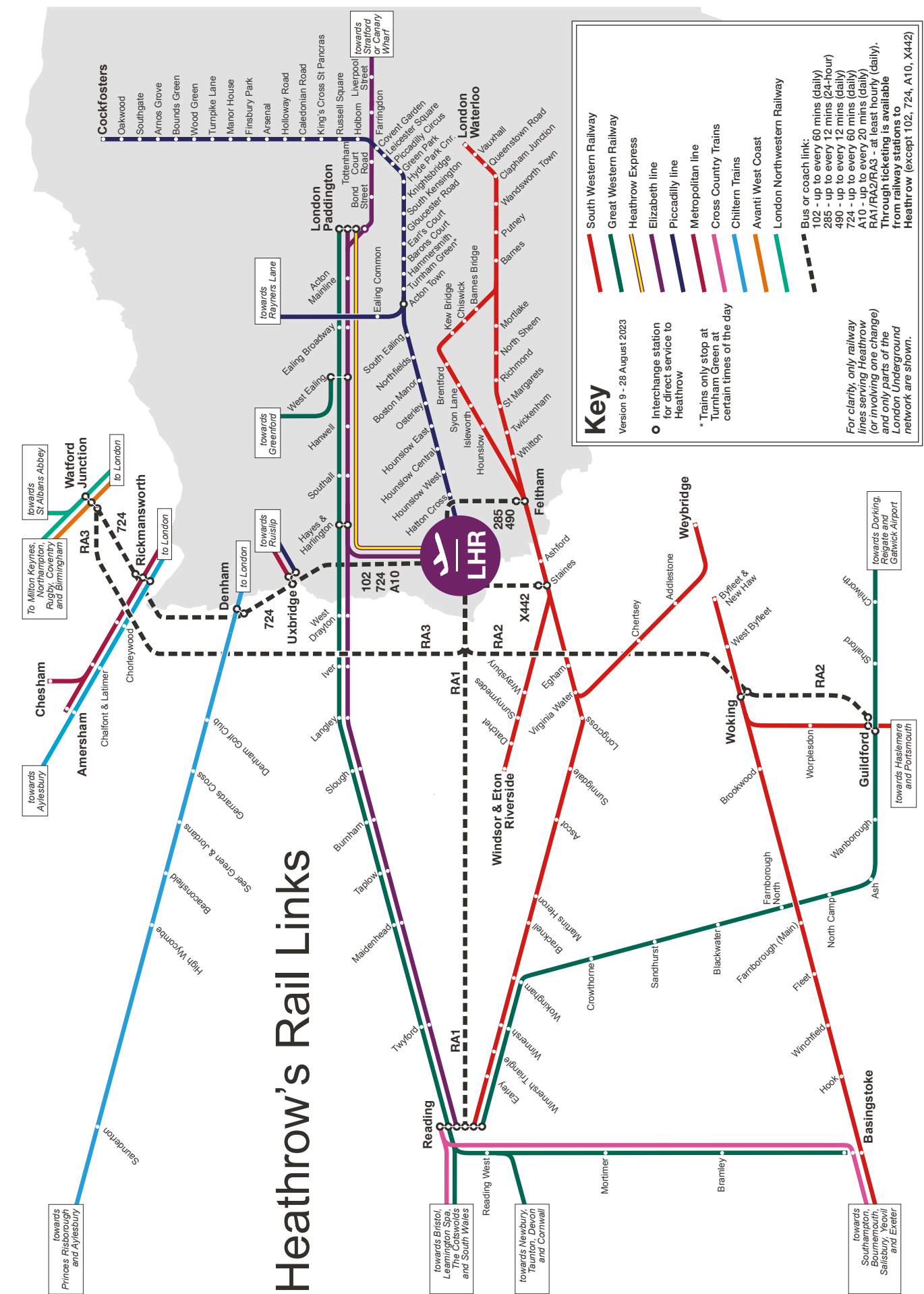


Local bus services from Heathrow T5



Local bus diagram





CONCLUSIONS AND CLOSING REMARKS

This Travel Report has demonstrated that we have already achieved (and exceeded) three of our four surface access targets and are continuing to make progress towards the target for carbon emissions.

Whilst we are pleased with this progress, we recognise that we need to maintain this momentum. In order to do this effectively, our approach will remain data and evidence led, proactive, and with a key focus on return on investment.

Specifically, we will continue to evaluate our investment in public transport to ensure it delivers value for money and is effective in reducing the number of car trips made by passengers and colleagues. We will also support the transition to zero emission vehicles, with the aim to reduce the impact of

congestion and vehicle emissions on local communities and contribute to reducing the airport's carbon footprint. Furthermore, we will continue to invest in our targeted workstreams on colleague behaviour change so that as much of the Heathrow workforce as possible are commuting sustainably.

We will continue to report on progress annually and look forward to continuing our collaborative work with our stakeholders to deliver on our shared ambitions for sustainable surface access to, from and around Heathrow.



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