

# Our Belief: quality mass transit is fundamental to a safe, green and prosperous future

## The key challenges remain unchanged

Urban areas face the same long-term challenges from congestion, carbon emissions and the imperative for clear air as they did prior to the pandemic.



Infrastructure constraints remain, populations continue to grow, children need to go to school, and populations are ageing and need access to medical care.

Cars emitted over 70% of surface transport emissions in the EU prior to the pandemic. Although the pandemic has temporarily shifted modal share back to the private car, this is unsustainable as mobility continues to rise.



72bn

more passenger km in the UK

20yrs

worth of car and van traffic growth

If the modal shift seen through the pandemic were to persist when volumes return to normal, this would result in 72 billion more passenger km in the UK alone. This would set us back two decades.

More than ever, integrated, accessible, safe, reliable transport networks are vital for prosperity.

## What have we learned through the pandemic?

The services we provide are essential. During the pandemic, we have continued to operate in order to provide vital services, backed by our loyal customers, and both local and national governments.



## We have not changed our long-term view on the demand for transport

Demand for transport is expected to increase by 25% by 2030 in wealthy cities, and by 80% in developing countries. This demand cannot be satisfied by increased car use.



### Accelerating change

Our products and services will continue to adapt to meet the changes that the pandemic has brought into focus:

More flexible working, but generally for the wealthy. Essential workers need to travel to work. People who work from home part time will welcome flexible, convenient transport solutions.



Digitalisation: move to cashless transaction and frictionless journeys.



Desire for clean air and liveable spaces: people want to live in greener towns and cities

We can see from the data that as lockdowns ease, demand returns. We provide an essential service.

Technology is helping deliver better ways to serve the customer



### Public transport is the solution

Zero emission buses will provide the backbone of clean, reliable, safe transport networks. Technology, range and cost are improving, and we estimate that electric buses will reach Total Cost of Ownership parity with diesel by 2024/25, and hydrogen technology is rapidly improving its cost effectiveness.



25%

increase in demand for transport

70%

of surface transport emissions emitted by cars prior to Covid-19



National Express will continue to be the trusted partner for cities and school boards that share our vision of a prosperous, clean, green future.

We will continue to provide environmental leadership, and to invest for a cleaner, greener, safer tomorrow.

