

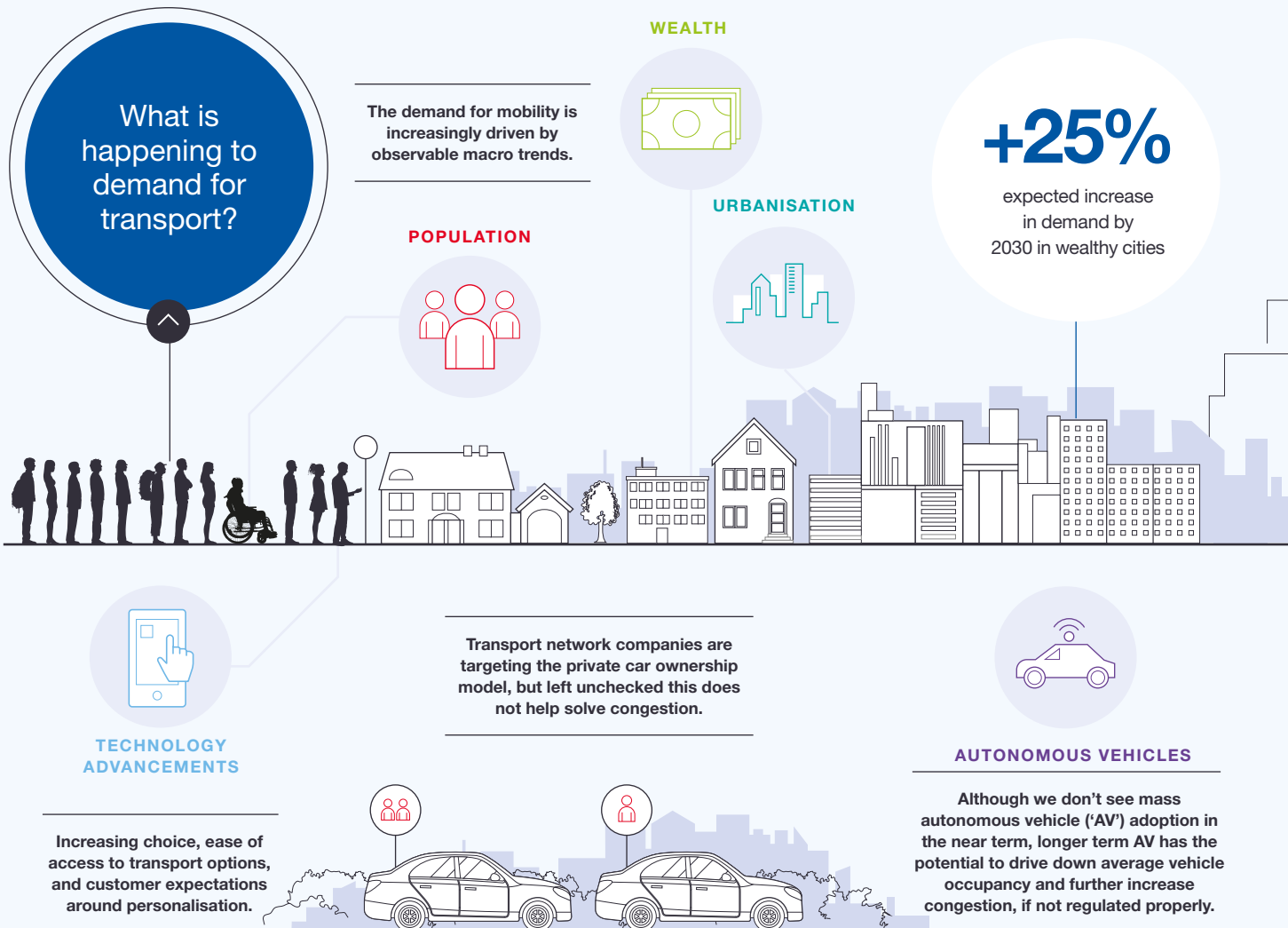
# Mass public transport is the only viable solution for increasingly congested and polluted cities

## Market overview

Urban areas are seeking to meet ever-increasing demand for integrated, door-to-door journeys while managing the challenges of congestion, carbon and clean air. The public want convenient, trouble-free access to clean, uncongested, liveable cities. Transport authorities want to offer better integrated public transport to become cleaner and less congested.

We are at an inflexion point in transport, where private car ownership is beginning to decline, but demand for travel is growing in cities with limited space for expansion of transport infrastructure. These factors mean that safe, efficient mass transit will be increasingly important for prosperous and developing urban areas.

Public transport will be part of an integrated transport network, with technology enabling real-time journey choice and flexible payment options. The successful operators of the future must therefore provide sophisticated technology platforms and quality services or be able to integrate seamlessly into them.



## How will cities respond?



- Cleaner and less congested cities need high quality, safe, efficient public transport
- Regulation will focus on driving demand towards integrated mass transit solutions

## What does this mean for the transport industry?



- Efficient public transport will form the backbone of cities' sustainable transport strategy. At the edges of the network, smarter, deeply integrated feeder services will provide the links into high capacity, frequent services through the urban core
- Running mass transit services is a field of expertise that presents a high barrier to entry. For operators to be successful, they must provide a safe, reliable, efficient and cost effective service, which puts the customer at its heart
- Cities will want multi-modal capabilities to provide the seamless services customers need. The industry will need technology platforms, capabilities and expertise to support that goal, integrating core networks with complementary transport modes

The result?

Without intervention and quality public transport services, this will result in inevitable gridlock in our cities, worsening air quality, and city spaces that are unliveable.

**+80%**

expected increase in demand by 2030 in developing countries

