

National Express Coach

Elaine Williams
Deputy Service Delivery Director

Listed
1992



**\$3.2
billion**
annual turnover



Over
500
contracts in Europe,
Africa & America

Constituent
companies
operating since
1899



42,000
staff globally

3,600
urban buses

2,400
coaches



110
trains



3
continents



22,000
school buses



15
trams

350
depots



over **450**
bus routes



97%
contract
retention

We are...
national express
nationalexpressgroup.com

Our strategy to 2020

UK coach mission

To earn the lifetime loyalty of our customers by consistently delivering frequent, high performing public transport services which offer excellent value

UK coach vision

Change the perception of coach travel

How?

To achieve this we will offer competitive fares, with a consistent friendly service for journeys customers want to make – good value travel



Excellence:
We constantly strive to be excellent in all that we do.



Safety:
We only do what is safe and stop and unsafe behaviour.



Customers:
We place them at the heart of our business and relentlessly meet their expectations.



People:
We develop the talents, reward the exceptional performance and respect the rights of all our employees.



Community:
We are active in the communities we serve to generate economic, social and environmental value.

The coach market and National Express

- Increasing multi-modal competition, but UK Customer Satisfaction Index places National Express ahead of competitors, ranking us highest for overall customer satisfaction compared to other coach, bus and train operators

- Success based on our strengths:

Great value product

Unrivalled National network coverage

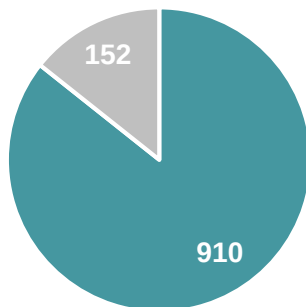
Competitive fares

Good customer service

Reliable and trusted operation – 45+ years, brand recognition

- c910 million leisure trips of over 50 miles each year. Of this, coach has a 2.5% market share (22.7m journeys per annum)

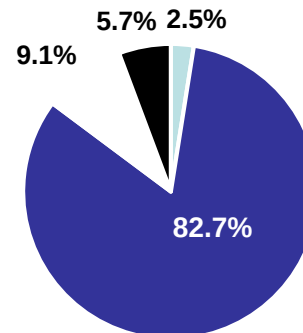
Market Size (Trips m)



■ Leisure Trips over 50 miles
■ To / from London Airport



Modal Split >50 miles (346m)



■ Coach ■ Car ■ Rail ■ Air / Other

National Express Coach – today

- Operate on a commercial basis – we run services at our own cost and risk, without the large public subsidies received by bus and rail
- The UK's only national scheduled coach network; **60%** market share
- Fleet of over **550** coaches
- Investment in newest and most efficient vehicles available – all vehicles purchased since 2014 have been Euro VI
- **38** partner operators to provide national coverage
- **1,700** employees
- **1,500 services** each day to almost **1,000** UK destinations, including round the clock services to the 5 largest airports

National Express Coach – today

- **c19 million** passenger journeys a year
- Our coaches travel over **195,000** miles each day or **72m** miles a year
- Coach passengers have 50% less carbon footprint than an electric car user
- More efficient use of road space afforded by coach Vs private car
- Market leaders in safety- Lytx DriveCam, Alcolock
- We were the first UK company to introduce wheelchair lifts over ten years ago. Our fleet is accessible. Our dedicated Assistance Travel team provides specialist support
- **Festival** and **Wembley** networks providing direct connections to sporting and music events

The modern passenger experience

Coach is a mainstream travel option. We consistently deliver frequent, high performing, great value public transport services across our unrivalled national network.

We work in partnership with our stakeholders to help achieve strategic transport objectives.

Modern branded fleet

WiFi

On board entertainment

Wheelchair lift

Comfortable leg room

Secure luggage storage

Reclining family friendly seats with seat belts

Guaranteed seat

Climate control

Power sockets

Real time information



national express

The North West

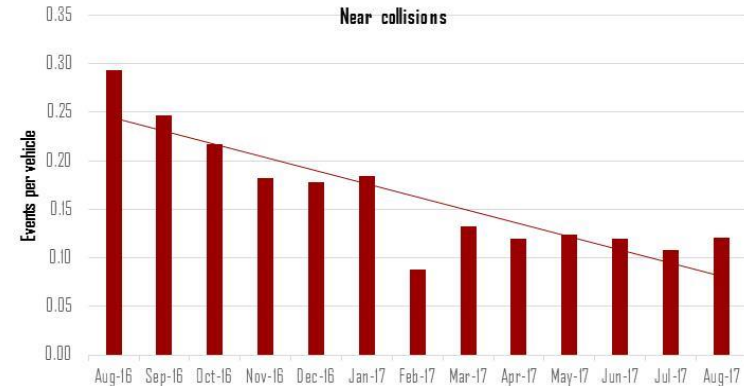
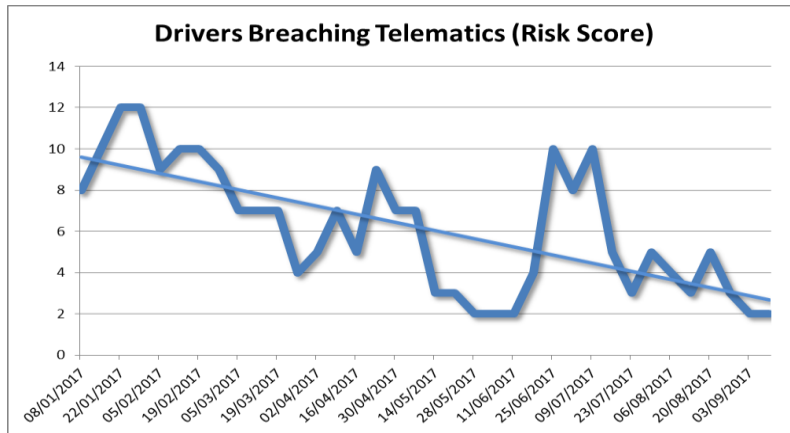
- Our national network operates as a hub and spoke model, with Manchester being one of our 5 national hubs
- We have a role to play in building sustainable connections with proposed schemes and developments, e.g. HS2, Liverpool's Superport - our flexibility and resilience ensures we can respond to gaps in connectivity where there is demand for travel, but where a rail, or local bus solution does not exist or is not yet operational
- Improving access to Manchester Airport – National Express directly serves Manchester Airport and coach can help address the challenges related to travel to and from airports including increasing public transport mode share, tackling congestion, and unlocking spare capacity in airports
- We work in close partnership with Merseytravel and TfGM to support their strategic objectives and improve the local transport offer, including commuter and events travel

Operational and strategic policy priorities

- Working together to improve the coach experience by addressing congestion, delays and journey reliability, helping to shape and deliver Local Transport Plan priorities
- The first commercial organisation to sign a Memorandum of Understanding with the then Highways Agency, in 2014
- We want to plan for the long term and influence the infrastructure debate
- Coach seen as part of the overall transport offer alongside bus and rail
- Business continuity and resilience planning
- Roads investment, including on the SRN leading to better journeys
- Air Quality – Modal shift away from private car, investment in Euro VI

Drivecam

- Standard fitment across entire fleet
- Records video after g force events to allow driver coaching
- Driving clear improvements in safety



Alcolock

- Standard fitment across entire fleet
- Engine can not be started unless a sample of less than 8 micrograms per 100 ml of breath given
- More than 4 times stricter than the legal limit
- Allows for 100% control of drink driving
- Failure results in immediate removal from the network



New standards for 2018

Standard	Summary
Driving Evaluations	• All drivers to have a formal evaluation at least every 2 years
Competence Requirements: Driving Evaluations	• All Evaluators to hold ROSPA as an approved vocational qualification • Ongoing validation for Evaluator competence
Speed Management	• Accurate automated monitoring & reporting of speeding events • Robust and consistent management processes
Driver Monitoring	• Proactive monitoring of driver behaviour via DriveCam, CCTV, Traffilog, covert/overt inspections • Robust and consistent management processes
Driver Performance Management	• Implementation of a system that supports the process of evaluating driver behaviour, performance and competence and verifies any management action taken

Punctuality

- Punctuality is one of the key drivers of customer satisfaction
- We define our measure as the number of services reaching their end destination within 10% of their targeted time
- Constantly striving for improvements through our Right Time Every Time initiative:
 - Continuous punctuality reviews
 - Close measurement of first origin punctuality
 - Linking punctuality to operator performance and ultimately remuneration
 - Monitoring punctuality by coach station
 - Assisting the driver with loading etc where appropriate
 - Flexing running time by day of week/time of day
 - Allowing for roadworks – working with Highways England to plan for disruption and minimise impact

Air quality and emissions reduction

Modal shift away from private car is the quickest and most cost-effective means of reducing emissions from transport

We target diesel emission reduction through our Fuel Efficiency Task Force with initiatives including:

- Closer matching of supply to demand (vehicle size, demand)
- Reducing “dead miles”
- Telematics
- Investment in new fleet
- Idling free zones across stations and stops
- Letters to drivers on their fuel efficiency performance



UK Coach Operator of the Year 2018

Top Large Fleet Operator 2018

Making Coaches a Better Choice Award 2018

