

Decarbonising Travel
31st January 2024

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Action to reduce emissions from transport is urgently needed.

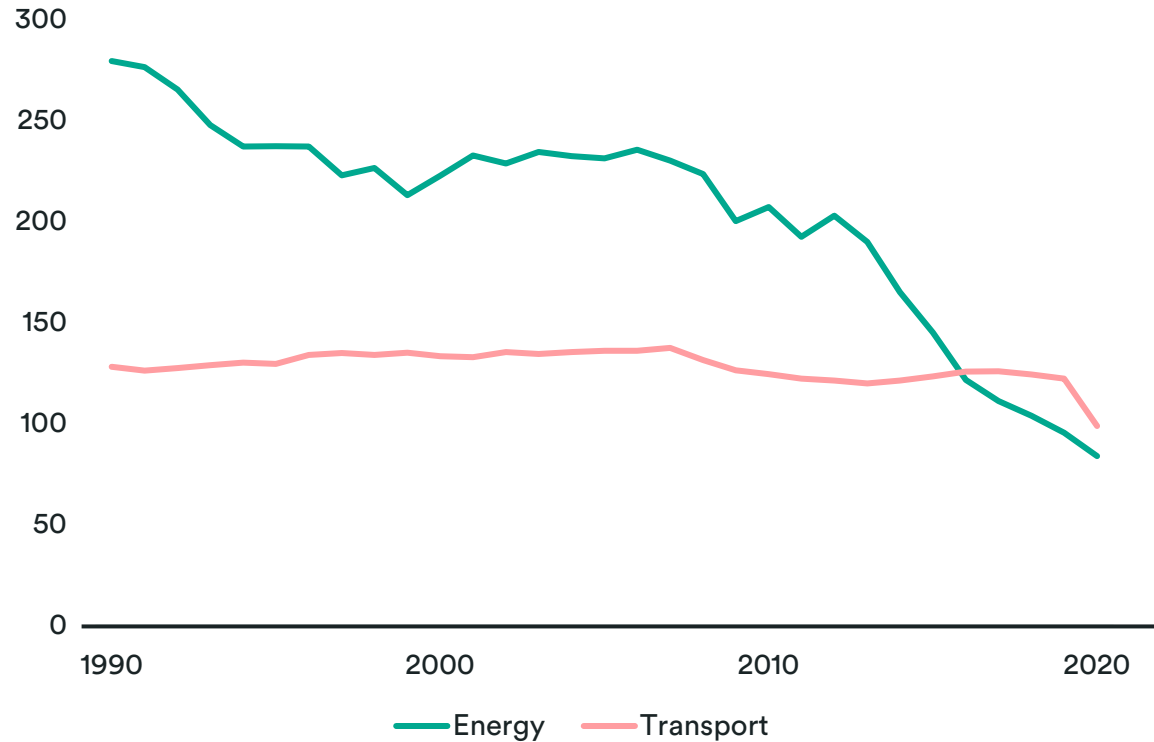
An assessment of existing and planned Net-Zero policies found that the transport sector has a policy gap of 26%, the largest gap across all industries.

Green Alliance, Net Zero Policy Tracker, June 2023

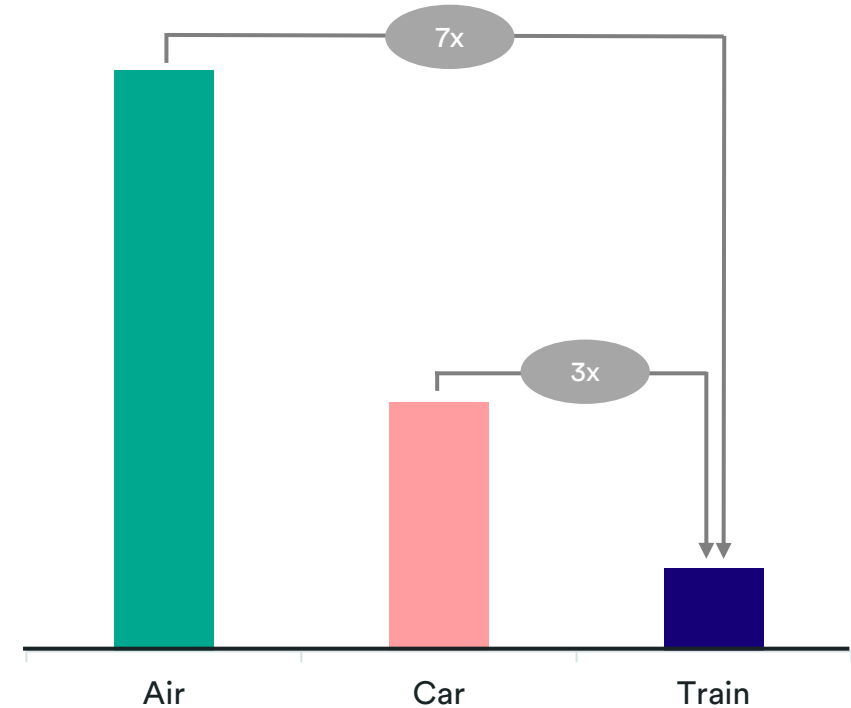
Modal shift a key way to reduce transport emissions

Transport responsible for 26% of all emissions¹

Million tonnes of CO₂ equivalent



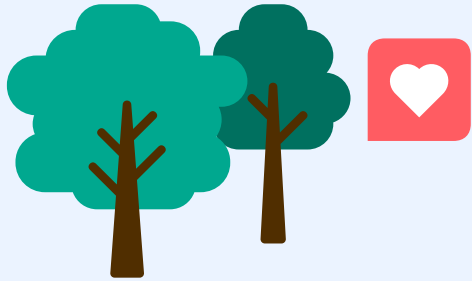
Switching to rail significantly reduces emissions²



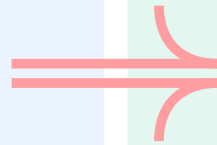
1. BEIS UK GHG emissions by sector, 2022

2. Emissions per passenger/KM as per <https://www.gov.uk/government/publications/greenhouse-gas-reporting-conversion-factors-2021>

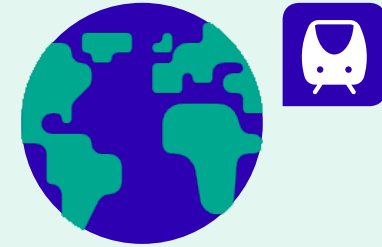
Our purpose



**Empowering greener
travel choices**



Our vision



**Building the world's
number 1 rail platform**

Uniquely placed to empower greener travel choices and drive long-term growth

Europe's #1 rail travel app



270+ rail and coach carriers



4.9* rated mobile app¹



FY24E: >£5bn Group Net Ticket Sales²



Strong growth tailwinds



€60bn rail market in UK & Europe



6/10 top high-speed routes have 2+ carriers



Growing awareness of rail's environmental benefits

Net Zero targets across the value chain by 2040, validated by SBTi



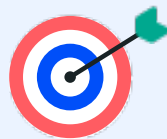
Agenda



1. **Helping make rail faster and better value for customers**



2. **Growing awareness of rail as more environmentally friendly**

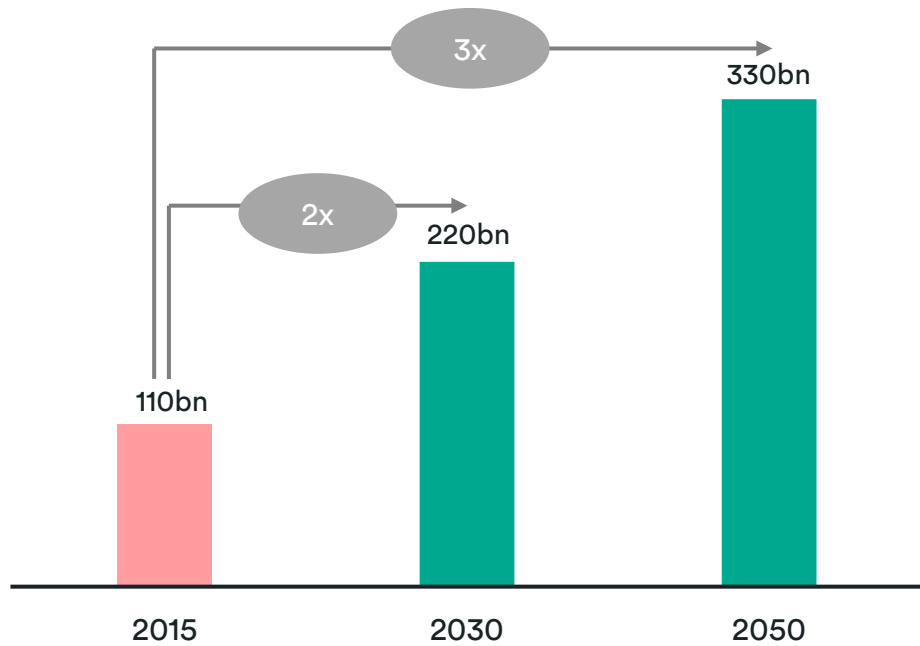


3. **Promoting greener habits**

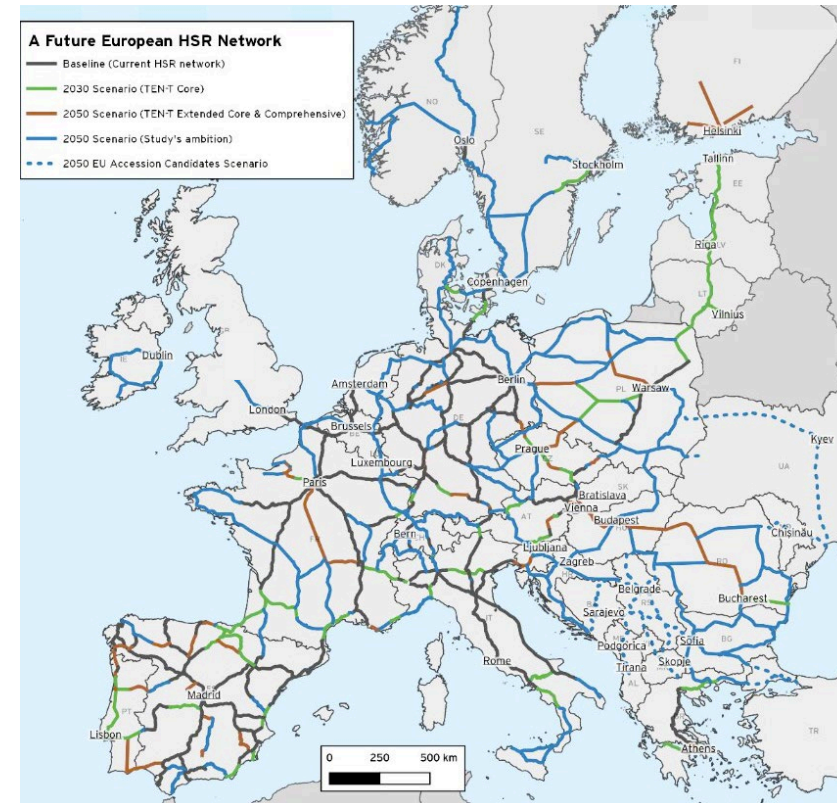
Stretching EU targets to drive growth in high-speed rail

Triple high-speed rail traffic by 2050

High-speed rail traffic (passenger/km per year)



32,000kms of high-speed rail links by 2050





European liberalisation increasing competition on key routes

- EU Fourth Railway Package mandating domestic market liberalisation
- Emerging carrier competition in Italy, Spain and France
- Carrier competition reducing average fares and driving up passenger volume

Today



Map: white lines represent routes with 2 carriers; yellow lines represent routes with 3+ carriers



Carrier competition reducing average fares and driving up passenger volume

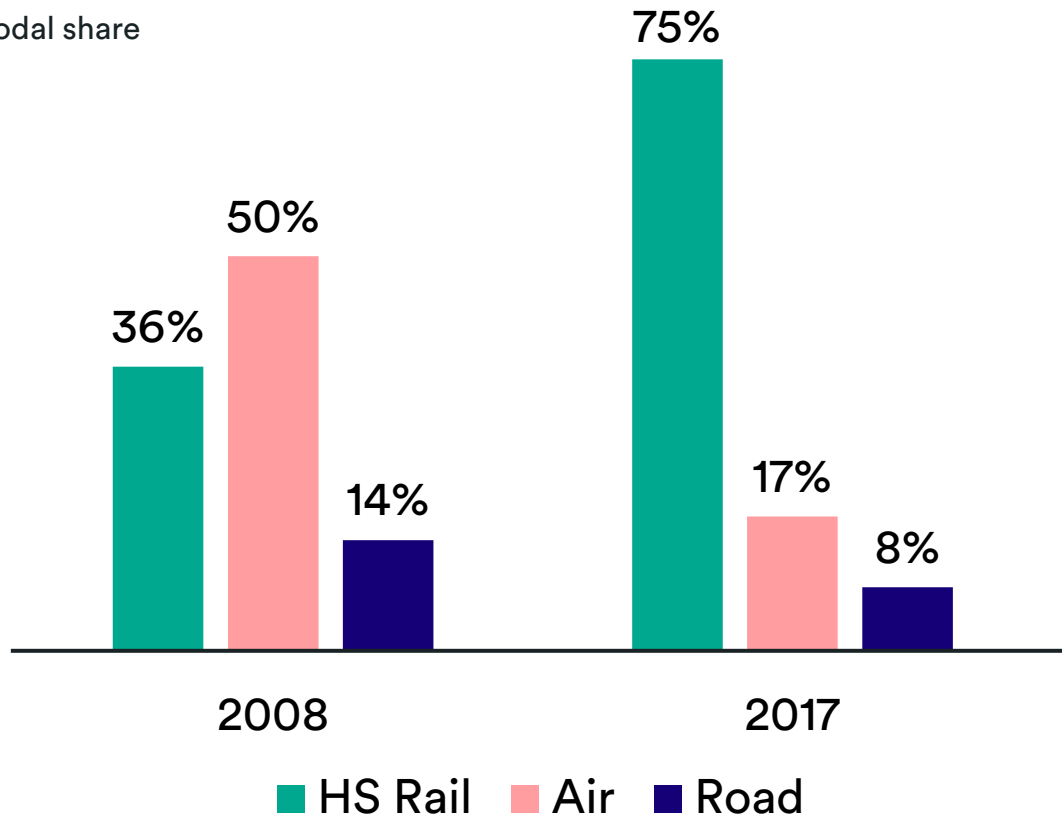


Rome - Milan

Competition on HS routes for 10 years

Average fare reduction
-40%

Modal share



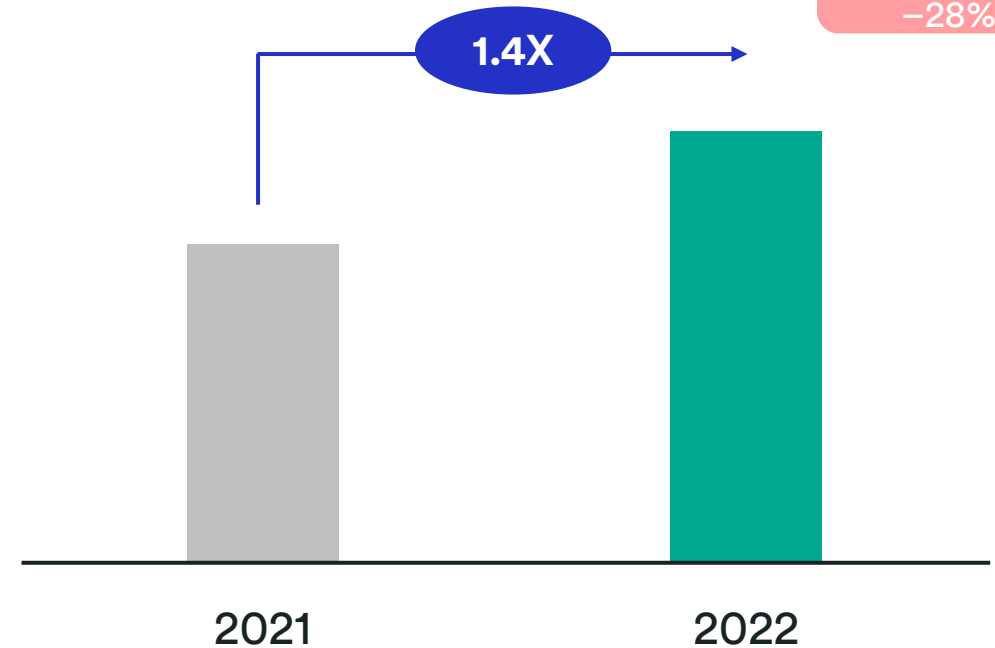
Madrid - Barcelona

Competition on HS routes for 2 years

Average fare reduction
-55%

Industry passenger volume¹

Air traffic down
-28%



¹ Relates to Q4 of calendar years

New entrant carrier competition arriving on key routes

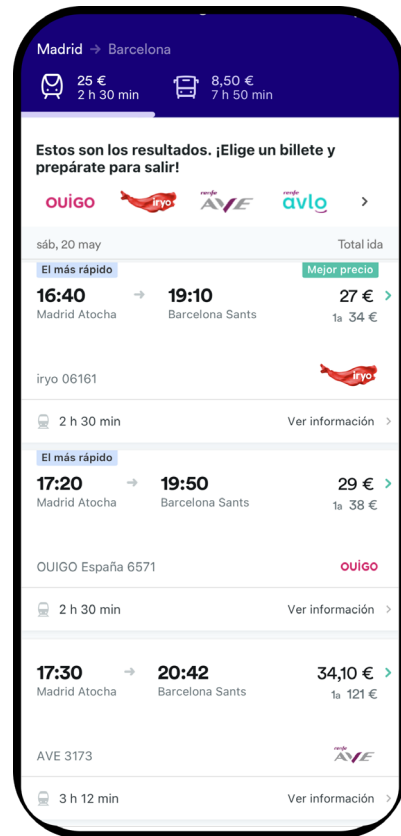
2026+?



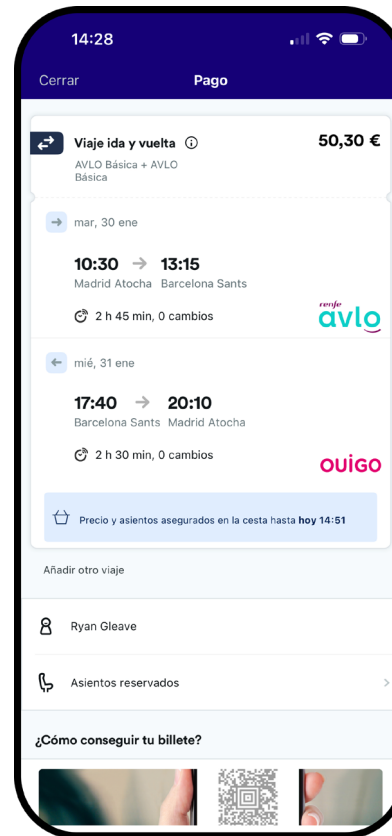


Trainline enabling customers to compare all the options in one place

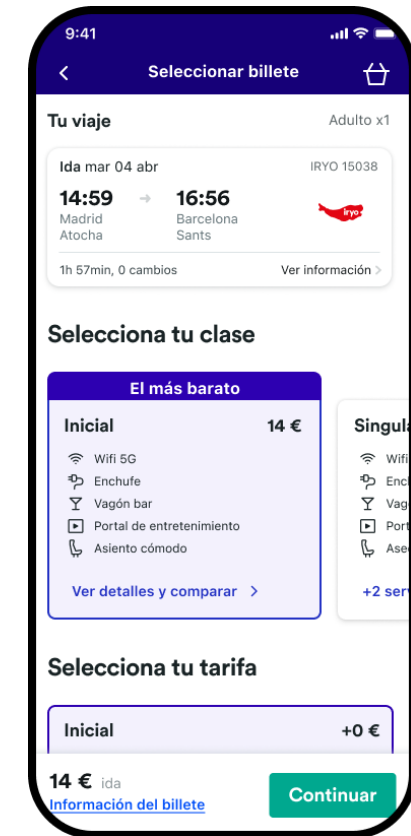
All carriers and journeys in one place



Stitching journeys across multiple carriers

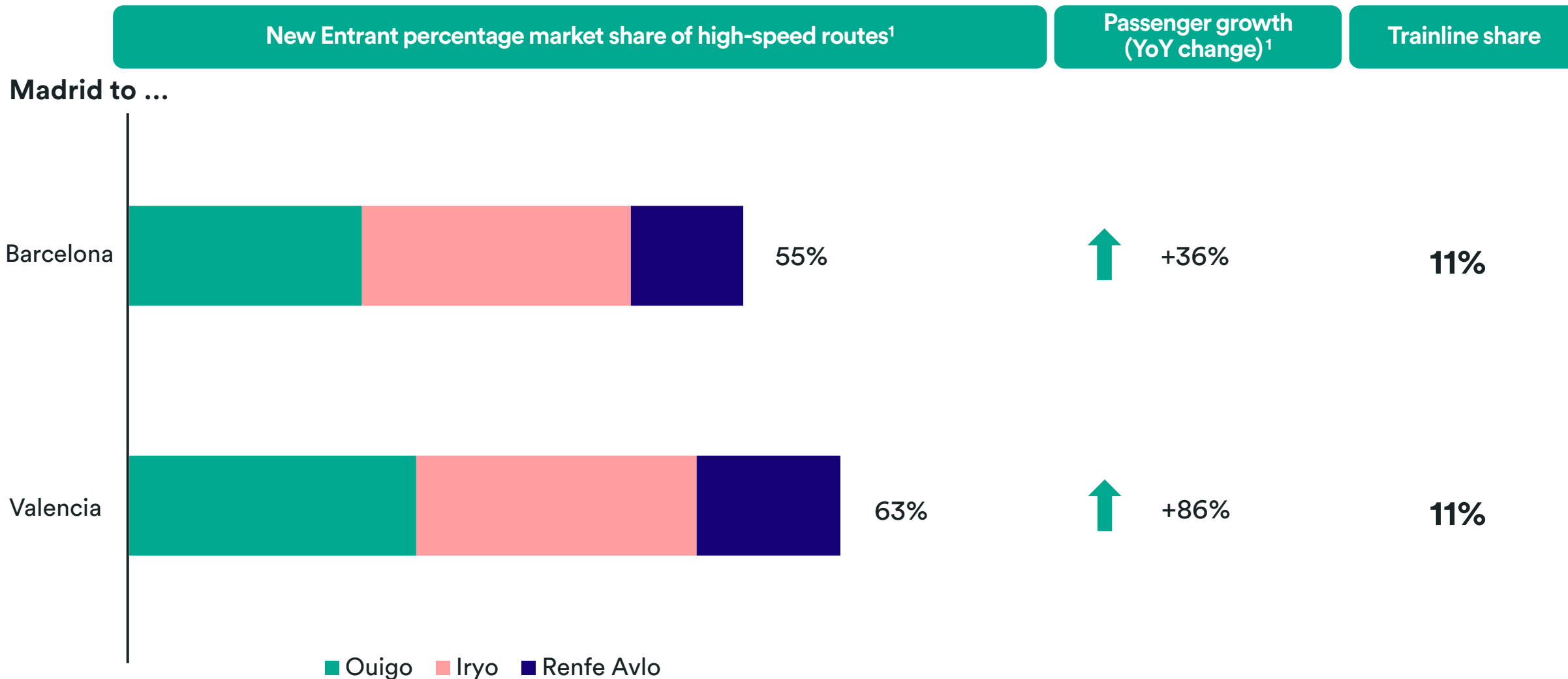


Deep carrier integrations to optimise UX





Trainline driving rapid adoption of new entrant carriers in Spain



1. Up to Q2 CY23, as per CNMC data



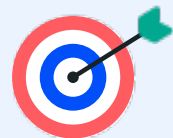
Agenda



1. Helping making rail faster and better value for customers



2. Growing awareness of rail as more environmentally friendly



3. Promoting greener habits

Knowledge remains limited of most impactful actions to reduce carbon footprint

Perception

Reality

Perceived Reality



Recycling more & reducing waste

1st

60th



Swapping car journeys for rail and public transport

1st



Switching to renewable energy

2nd

4th



Taking one fewer long-haul flight

=2nd



Turning off lights and appliances

3rd

52nd



Replacing one fewer short-haul flight with rail

=2nd

Perception gap/lack of awareness

I came by train



I pledge to swap one UK journey to rail

Let's do this together. Switch to train, save the planet.

I came by train because

First name

Email

We'll only contact you about your pledge and sustainable travel. [Find out more](#)

As a thank you for pledging a journey, we'll plant a tree on your behalf

Planting trees? [Tell me more](#)



A mission to make rail famous for being the most sustainable form of transport

Building pride in rail and boosting sustainable travel

Reached
11 million
people.

Resulted in a
14%
increase in behaviour
change intent.

Won 10
Industry awards.

40%
said it inspired them to
take the train more often.

Received recognition from the
UK Rail Minister



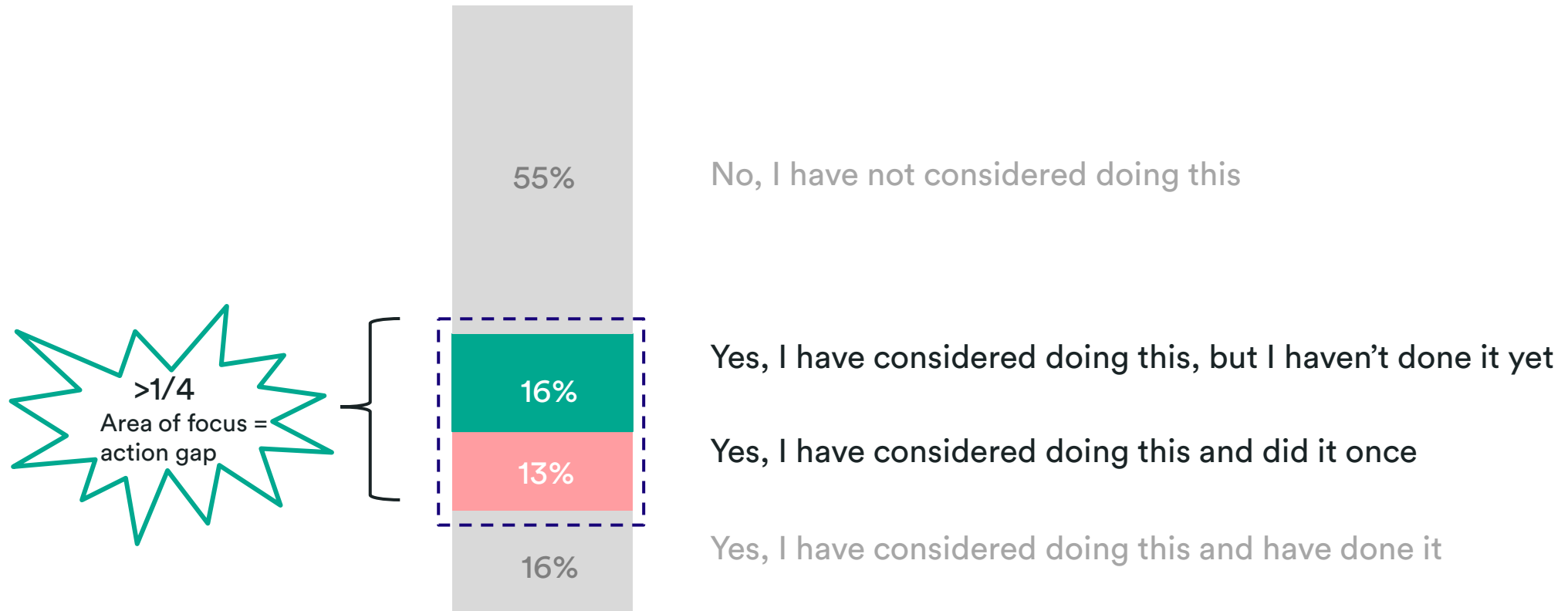
The Drum
Awards



I came by train

Where there is awareness, >1/4 of the public still show a lack of intent to act

Survey of customers in UK on whether they have considered taking a train more regularly





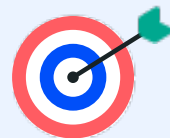
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1. Helping making rail faster and better value for customers

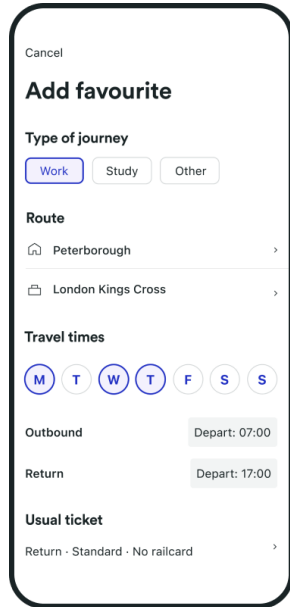


2. Growing awareness of rail as more environmentally friendly



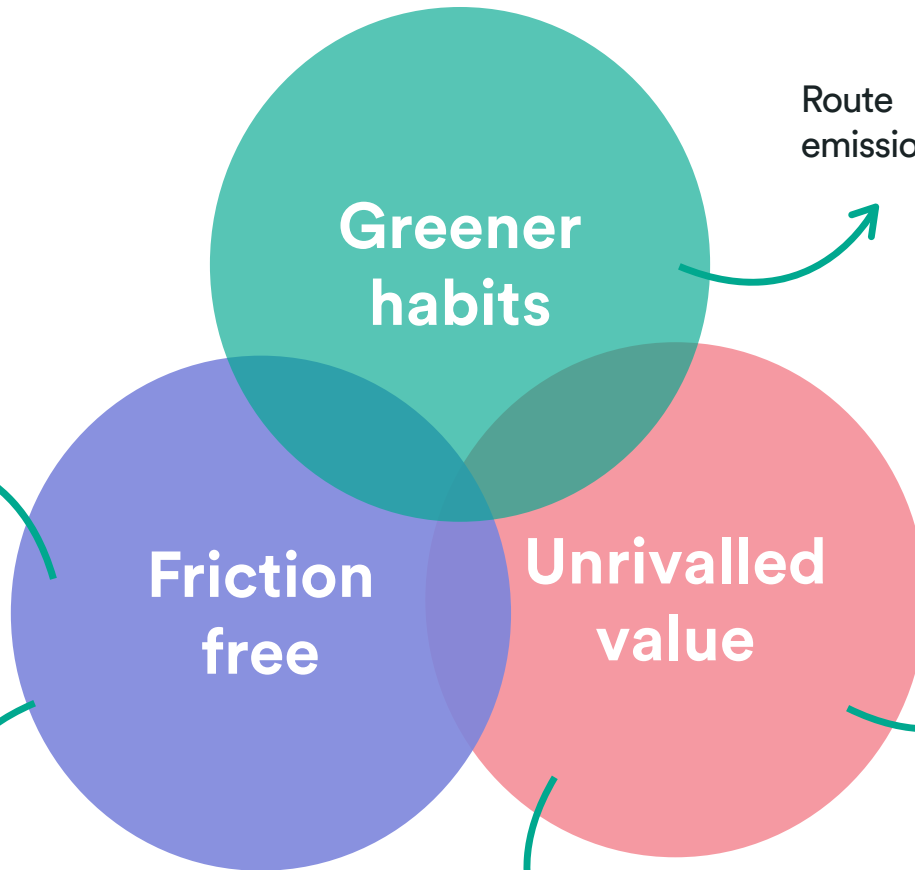
3. Promoting greener habits

Our customer proposition serves to empower greener travel

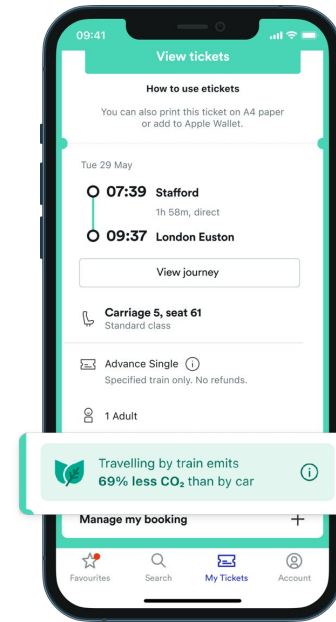


Digital ticketing including season tickets and 'favourite' commute personalisation

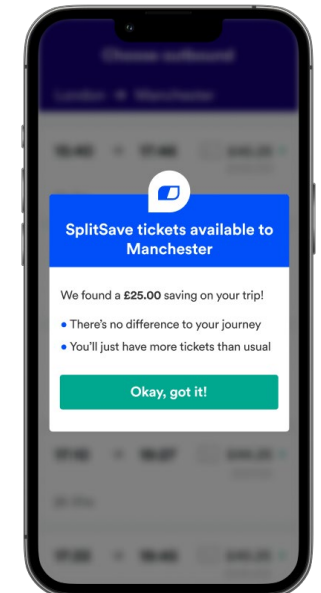
Simple, intuitive user interface



Route emission info



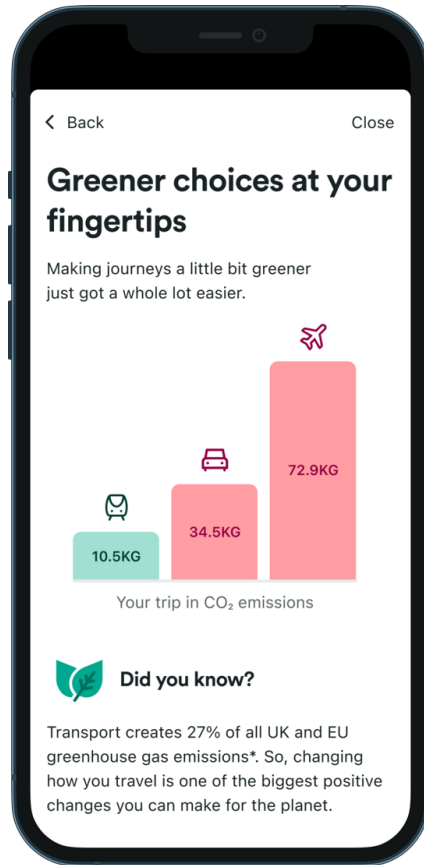
Money-saving features e.g. SplitSave (split ticketing)



All carriers, fares and railcards in one mobile app

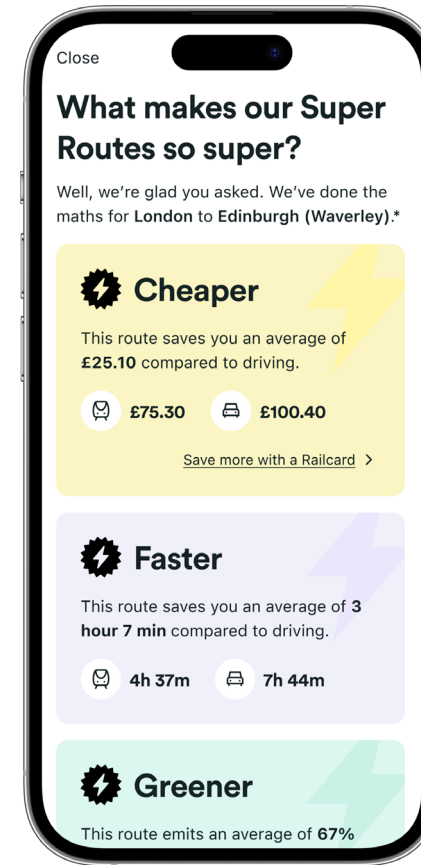
Promoting greener habits

Carbon Comparison



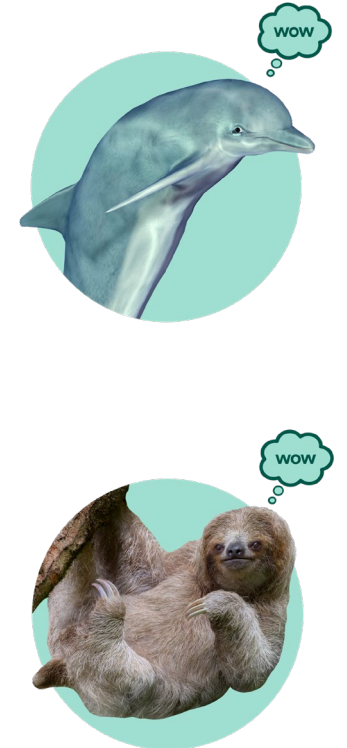
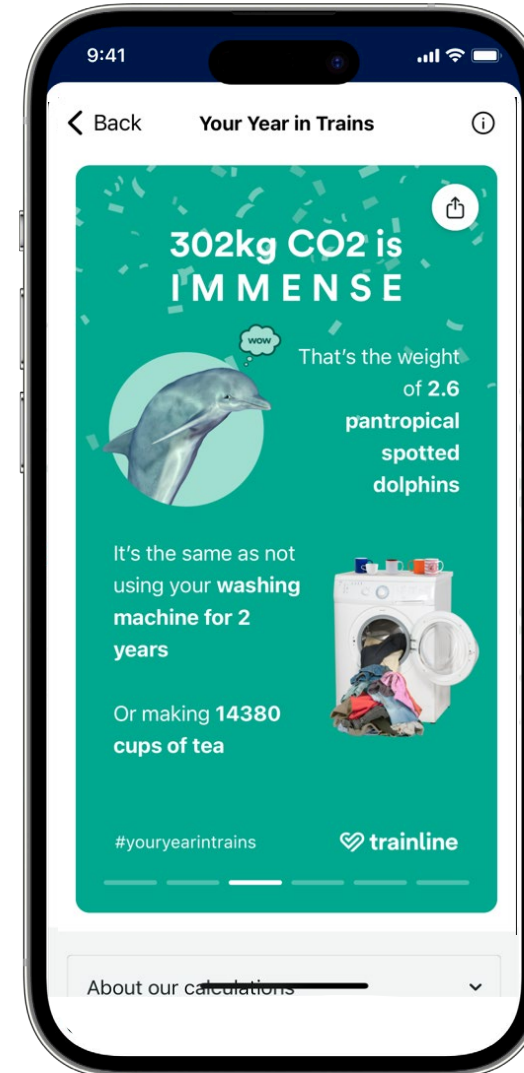
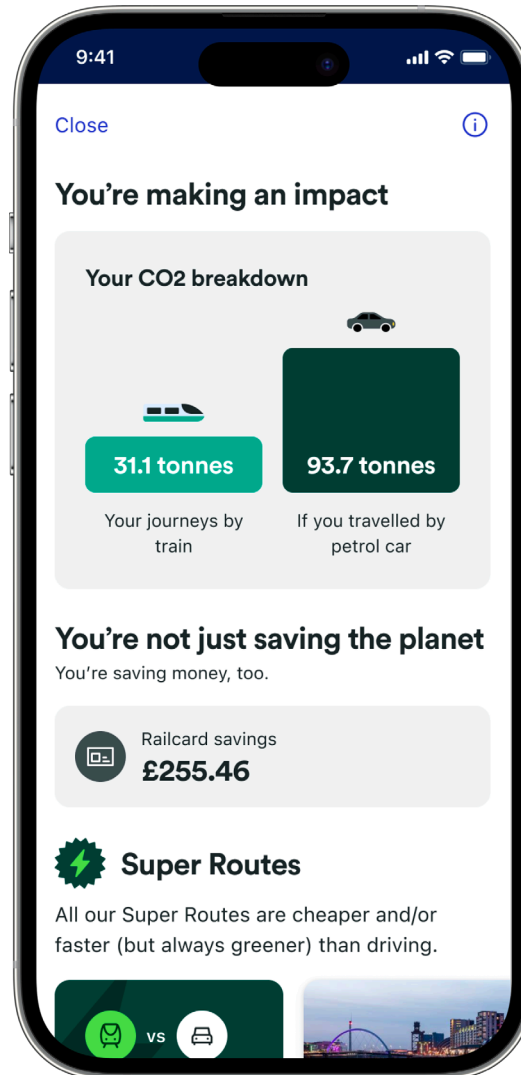
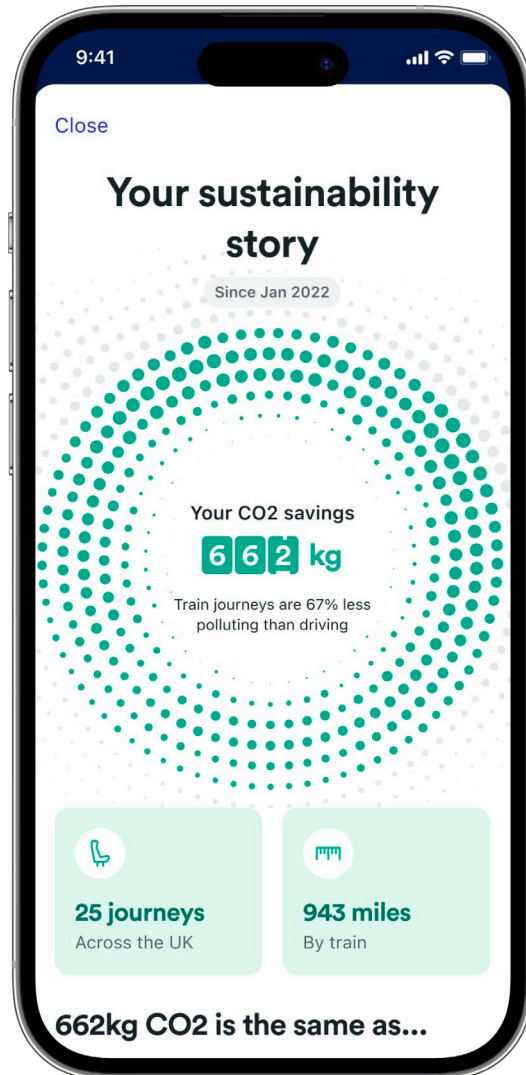
Surfacing to customers their emission savings from taking the train vs other forms of transport

Super Routes



Highlights routes where it is cheaper, faster and greener to take the train

Your Sustainability Story – personalising customer impact



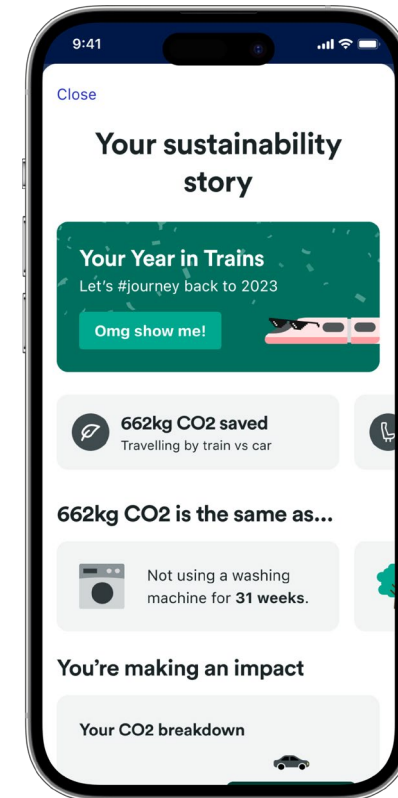
Problem: transport is the #1 emitting sector

Trainline: empowering greener travel

Aggregating all the carriers and journey options



Growing awareness and promoting greener habits





Q&A

Thank you

