

RDG Station Summit

Stations in Context

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3 December 2014

Context

- The successes
- The challenges
- The known blockers
- Key questions for today

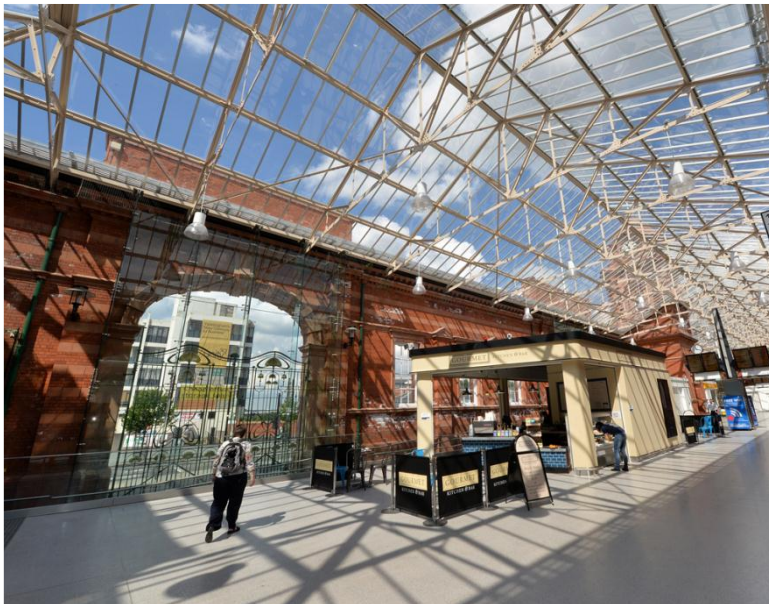


“ The Good ”

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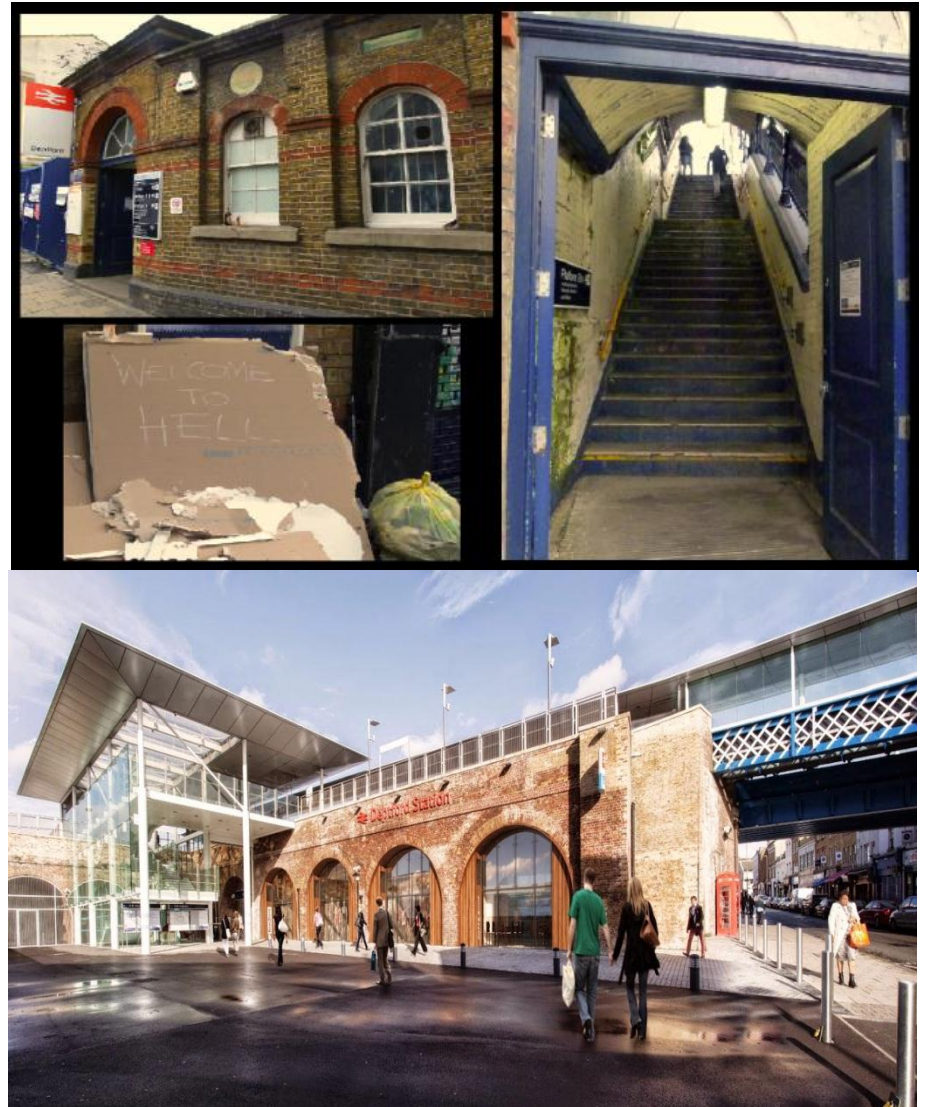
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Nottingham Hub – opens 26 November 2014



Contribution to rail journey experience has improved

- Car parking payment and security
- Inclusivity and accessibility
- Internet / wifi
- Onward travel posters
- Ticket retailing and collection
- Passenger information
- Staff engagement
- Perceptions of safety and crime



The station retail experience has developed and improved



There has been material investment

Item (£m)	Control Period 4 2009-14	Control period 5 2014-19
National Stations Improvement Programme	187	110
Access for All	308	132
Station Commercial Project Facility	100	
New Stations Fund	20	-
Birmingham Gateway	104	38
Reading Station (and other work)	590	143
Kings Cross Station	382	-
Renewals (Buildings)	1,300	1,200
Franchisee and other private investments	Yes	Yes
Devolved Governments' funding	Yes	Yes
European funding	Yes	Probably

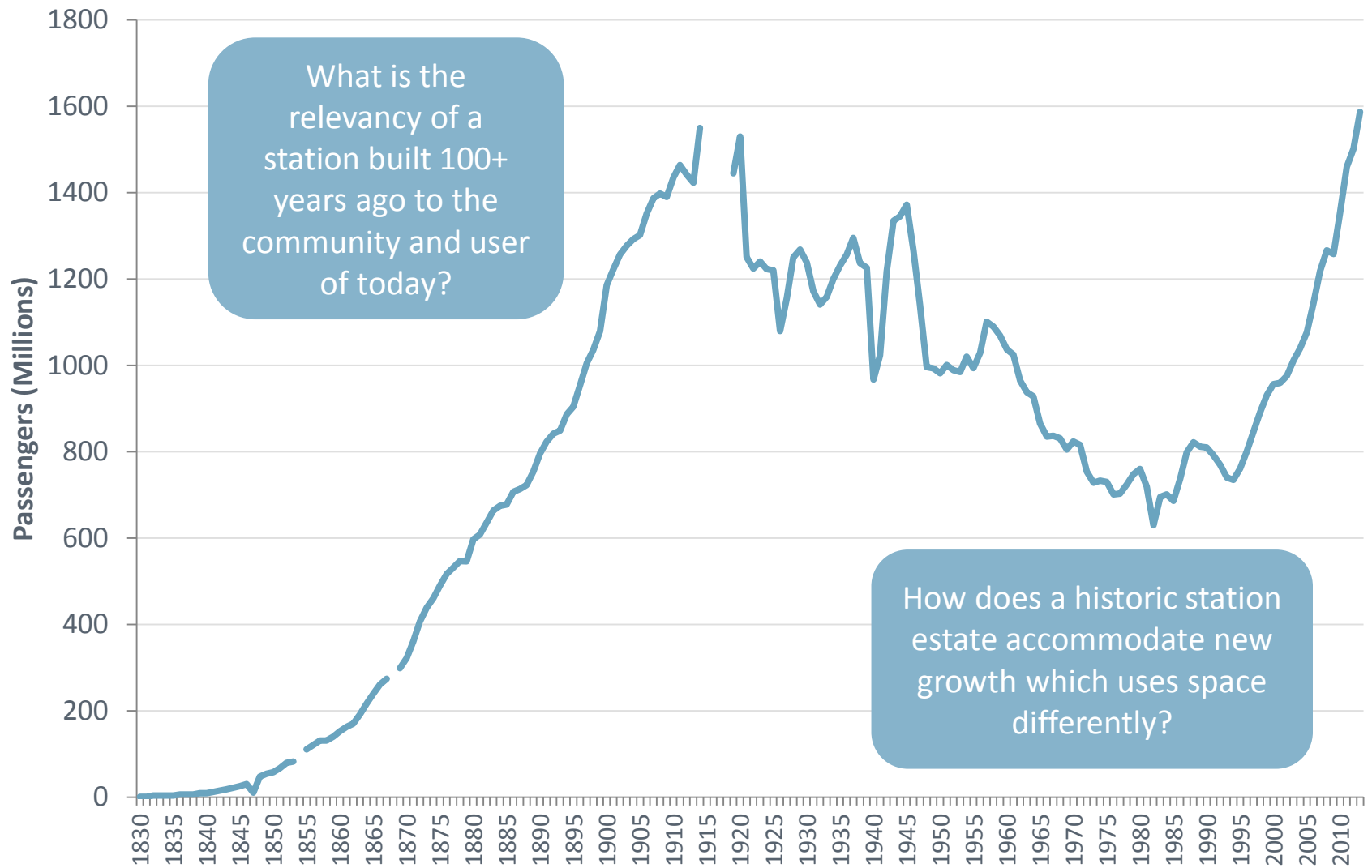
Note: All figures as quoted in relevant Delivery Plan and not adjusted to a base year

“ The Bad ”

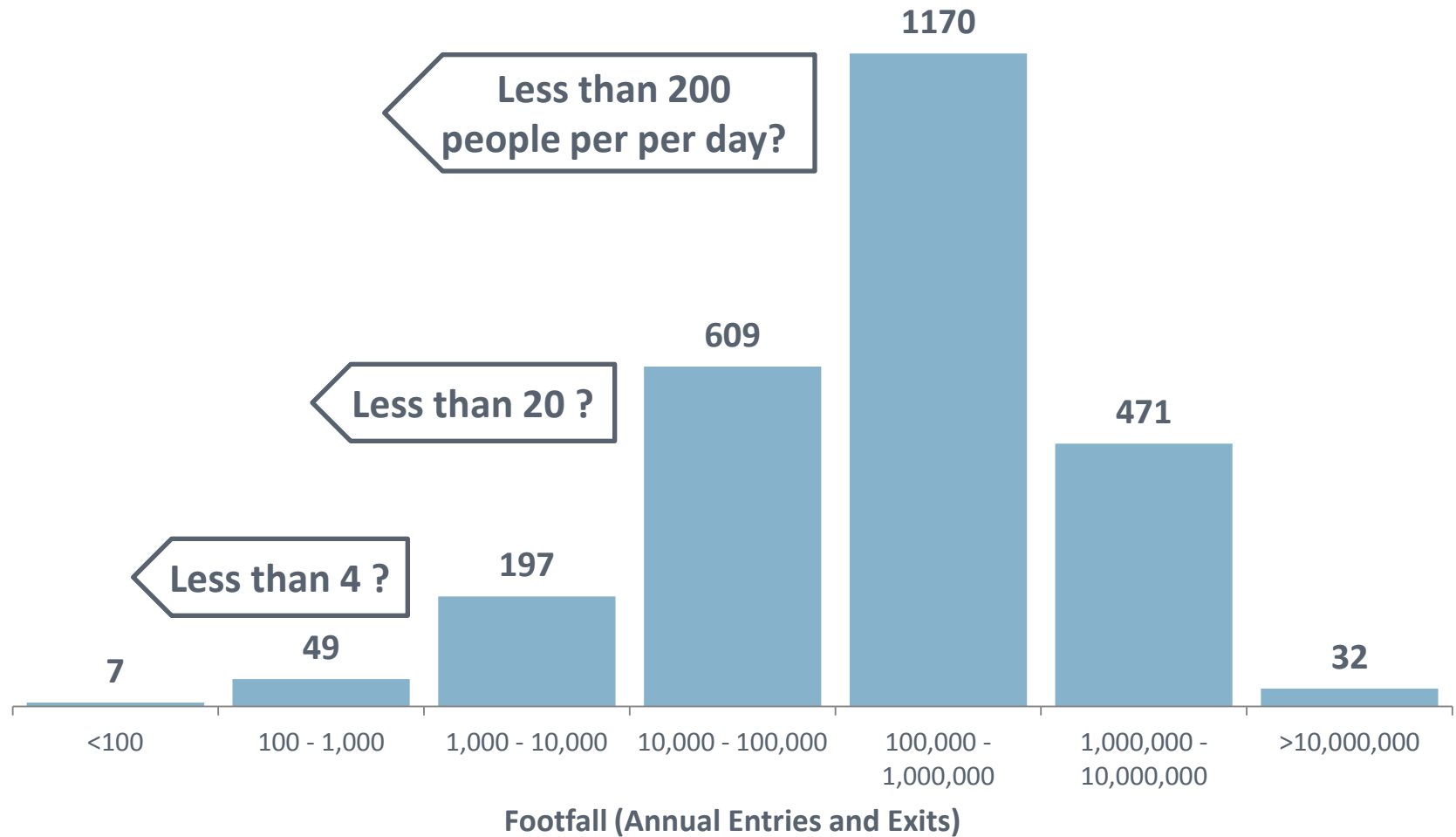
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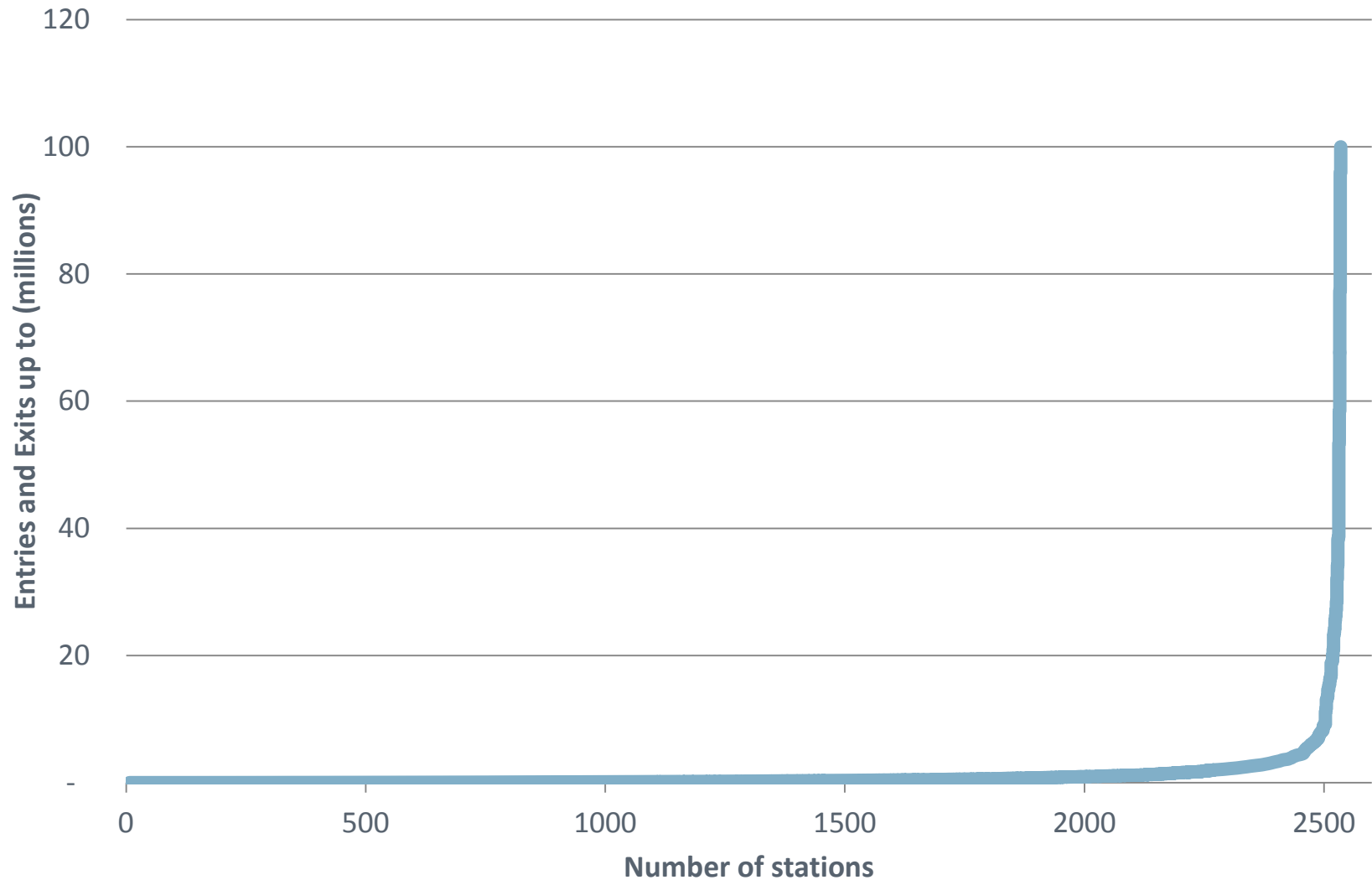
Local context has changed dramatically



Station usage remains spread

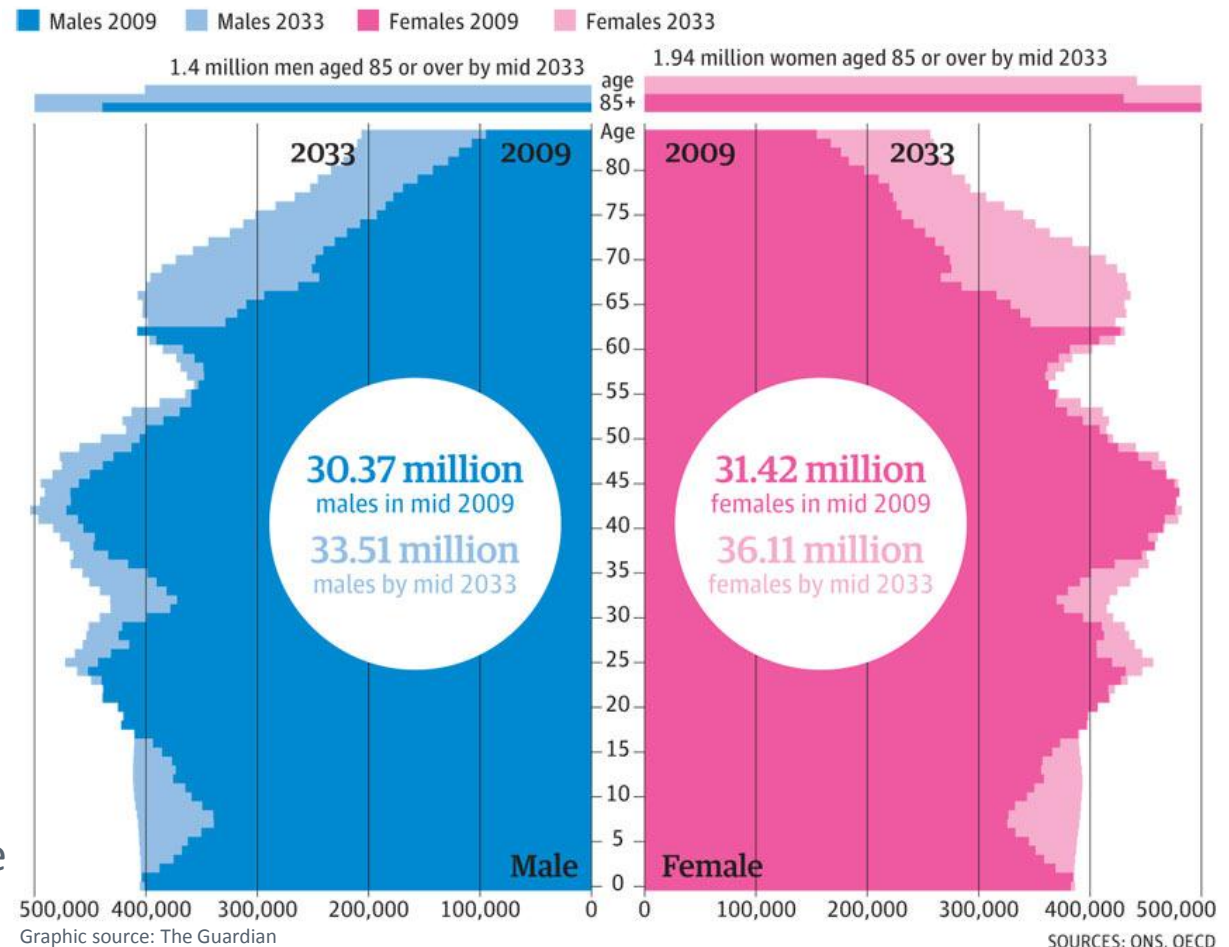


Where should our focus be?

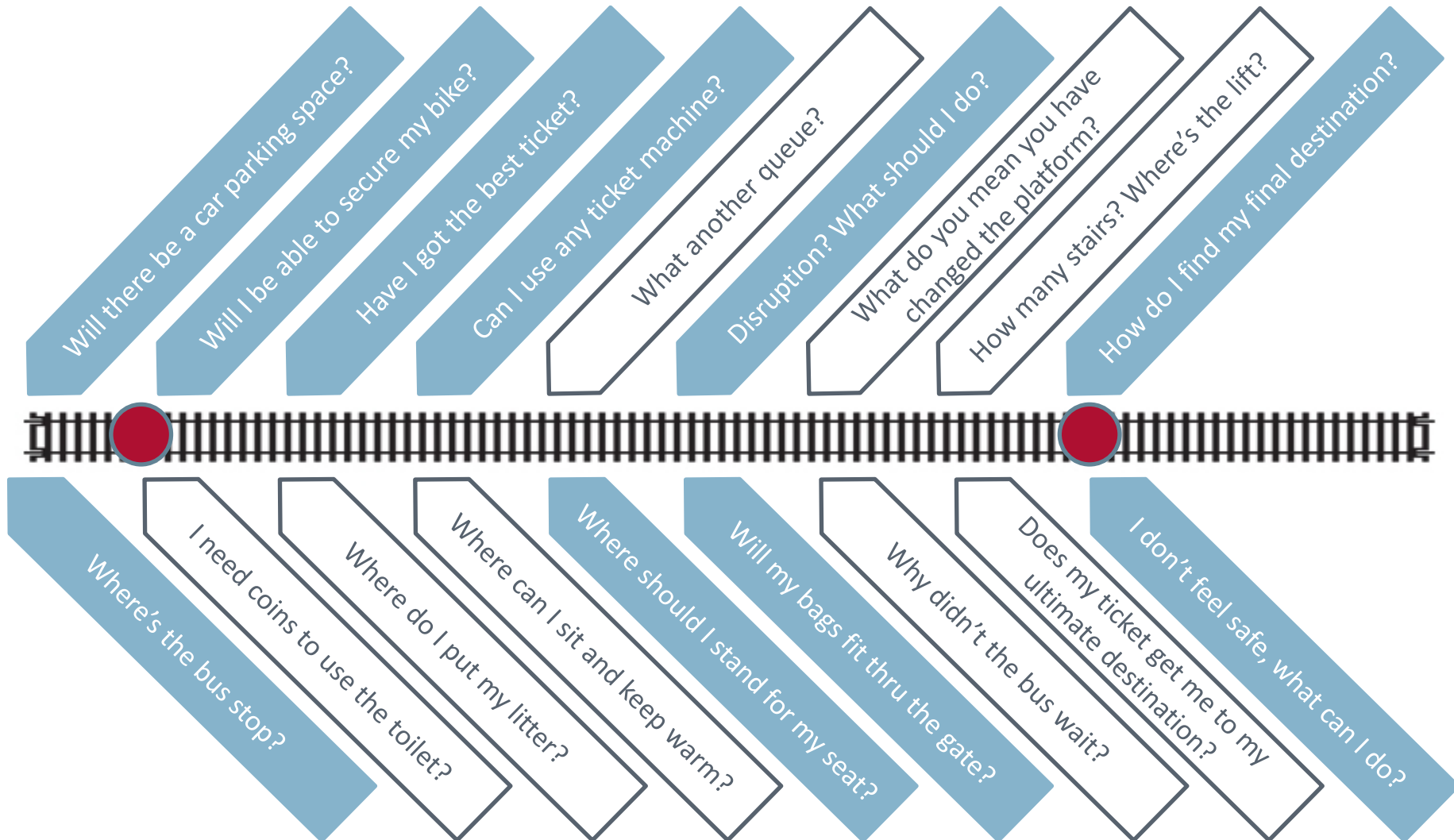


A changing, aging and more active population

- 70 million people in UK by 2029
- 45% of increase from outside the UK
- State retirement age will be 68 in 2028
- a million over 50s claiming Incapacity Benefit or Employment and Support Allowance
- What impact from RVAR train compliance in 2020?



Continuing consumer frustrations – confidence & hassle



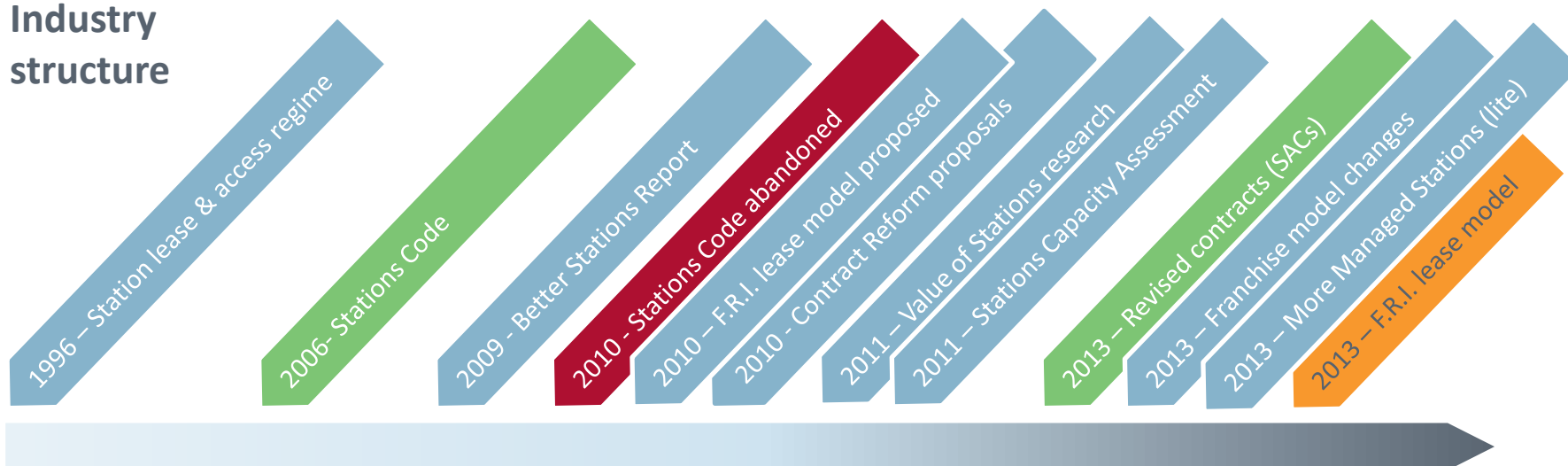
“The Ugly”

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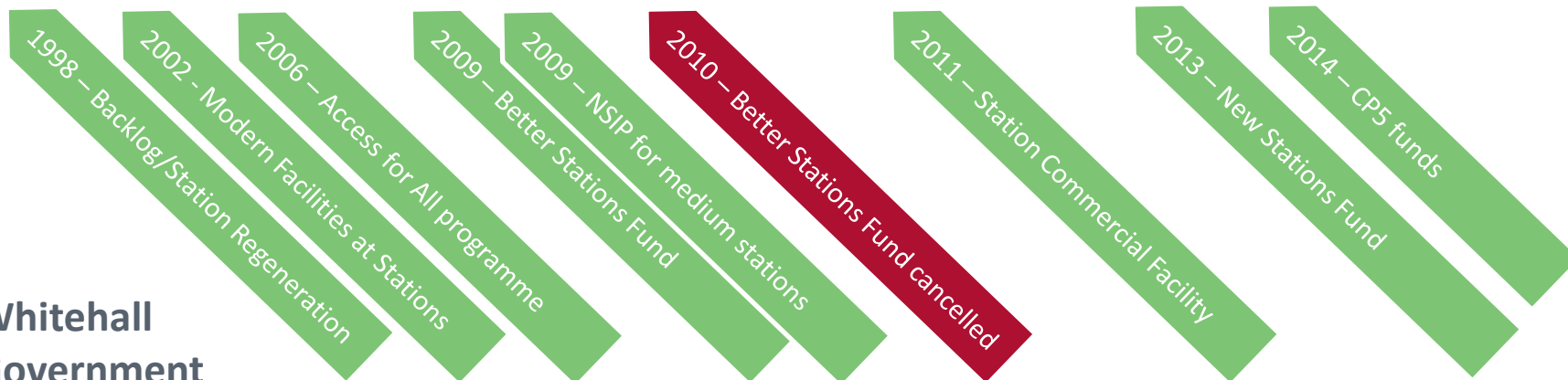
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Industry reform has been challenging

Industry structure



Whitehall Government station funding



Securing whole-life and whole-system efficiency and value

- Franchise model has changed over time – not always in a continuous process
 - OPRAF – short-franchises
 - SRA Mk 1 – very long (25yr) franchises with capital
 - SRA Mk 2 – short (7-15yr) franchises
 - DfT 2010 – long (15yr) franchises
 - DfT 2013 – short (7-10yr) franchises
- Franchise competition has not always helped
 - Compete primarily on price at bid
 - Reduce cost to make return in revenue support
 - Now quality is considered
- Residual value at franchise end still a challenge
- Are we recognising the whole-life and operating implications of what we invest in?



Relatively few common panels and passenger amenities across an extended infrastructure



“ the station’s architects originally specified that the station should be cleaned for 30+ hours a week ”

Have we always finished what we set out to do in a strong and consistent fashion?

- Modular Stations
 - Was the concept well-developed?
 - Did we develop the learning?
- Benefits of NSIP projects
 - Limited evidence provided of impact
- Station Zoning and Onward Travel Posters
 - Industry response to Better Station Report
 - Every station in UK to have a poster for onward travel
 - Every station to be evaluated and zoned
 - Delivered late and with some protests
- “Stations Made Easy”
 - great leap forward but how up to date is it?

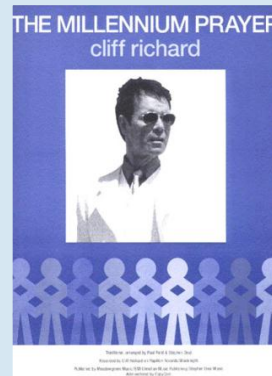


Stations Vision

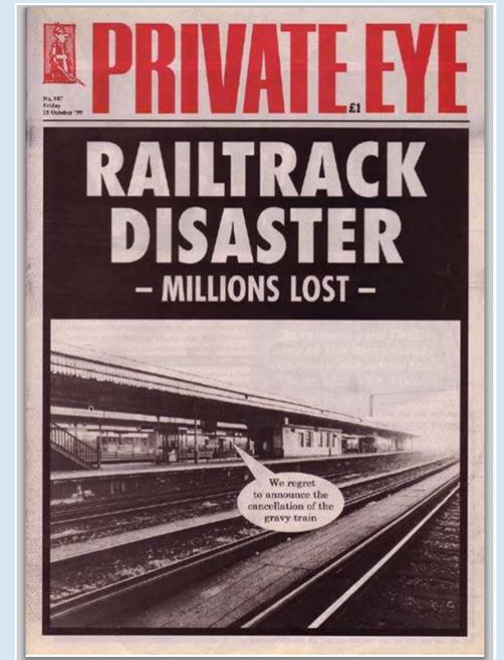
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What does 15 years look like?



Meanwhile in transport....



Conclusions

The Good

- The industry has delivered
- The Governments have continued to fund station projects
- The station offer has improved in many places

The Bad – implications of legacy and future

- The costs of wholesale, network-wide enhancement are prohibitive
- We have lots of smaller and medium stations on the network
- The challenges are going to get tougher

The Ugly – industry challenges

- Contractual regime
- Clarity and delivery across a national network



Key questions for a 2030 vision

- How will the rest of journey experience changed?
 - What will the on-train experience be like?
 - What will other transport modes look and feel like?
 - How will access modes have changed?
- How will consumer expectations have changed?
 - What will the experience at shopping centres be like?
 - What will convenience mean in your life?
- What can we have achieved by 2030?
 - What outputs?
 - What will it feel like to work on the nation's stations?
- What will the industry be planning for CP9 (2034-2039)
- What enablers will be present?

Nature of the Vision

- **How do you want to use the vision?**
- **With whom would you use it?**
- **How should RDG and the industry use it?**
- **What would you like it to look like?**