RDG Station Summit

Stations in Context

Mike Goggin

3 December 2014
Context

- The successes
- The challenges
- The known blockers
- Key questions for today
“The Good”

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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

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

*Note: All figures as quoted in relevant Delivery Plan and not adjusted to a base year*
“The Bad”
Local context has changed dramatically

What is the relevancy of a station built 100+ years ago to the community and user of today?

How does a historic station estate accommodate new growth which uses space differently?
Station usage remains spread

Less than 200 people per per day?

Less than 20?

Less than 4?

Footfall (Annual Entries and Exits)

- <100: 7
- 100 - 1,000: 49
- 1,000 - 10,000: 197
- 10,000 - 100,000: 609
- 100,000 - 1,000,000: 1,170
- 1,000,000 - 10,000,000: 471
- >10,000,000: 32
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?

Graphic source: The Guardian
Continuing consumer frustrations – confidence & hassle

- Will there be a car parking space?
- Will I be able to secure my bike?
- Have I got the best ticket?
- Can I use any ticket machine?
- What another queue?
- Disruption? What should I do?
- What do you mean you have changed the platform?
- How many stairs? Where’s the lift?
- How do I find my final destination?
- I don’t feel safe, what can I do?
- Where’s the bus stop?
- Where do I put my litter?
- Where should I stand for my seat?
- Will my bags fit thru the gate?
- Why didn’t the bus wait?
- Does my ticket get me to my ultimate destination?
“The Ugly”

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Industry reform has been challenging

Industry structure

1996 – Station lease & access regime
2006 – Stations Code
2009 – Better Stations Code
2010 – F.R.I. lease model proposed
2010 – Contract Reform proposals
2011 – Value of Stations research
2011 – Stations Capacity Assessment
2013 – Revised contracts (SACs)
2013 – Franchise model changes
2013 – More Managed Stations (lite)
2013 – F.R.I. lease model

Whitehall
Government
station funding

1998 – Backlog/Station Regeneration
2002 – Modern Facilities at Stations
2006 – Access for All programme
2009 – NSIP for medium stations
2010 – Better Stations Fund
2010 – Better Stations Fund cancelled
2011 – Station Commercial Facility
2013 – New Stations Fund
2014 – CP5 funds

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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....

20 Nov 1999
Jubilee Line opens

31 May 1999
Midland Metro opens

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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?