

Long Term Planning Process: Update

Presentation to TfSHIoW

17/10/2013

Slide pack overview

- 1) Recap of the key messages from the Market Study consultation documents
- 2) Summary of the consultation responses – common themes
- 3) Key points from the responses to the individual studies:
 - a Long distance passenger
 - b London and South East
 - c Freight
- 4) Key conclusions
- 5) Next steps – Market Studies, Cross Boundary Analysis and Route Studies

Market Studies

Long Term Planning Process: Long Distance Market Study



Long Term Planning Process: London and South East Market Study



Long Term Planning Process: Regional Urban Market Study



Long Term Planning Process: Freight Market Study



1) Recap of key messages from consultation documents – market segmentation

- **Long Distance.** Journeys >50 miles, & journeys <50 miles with a high proportion of travel for business purposes
- **Regional Urban.** Primarily commuting & leisure journeys of < 50 miles to/from regional centres
- **London and South East.** Travel within area to the south/east of Weymouth, Swindon, Northampton, Peterborough
- **Freight.**

1) *Recap of key messages from consultation documents – study deliverables*

- **Strategic Goals for the market sector**
based on current and likely future funders' aspirations, and linked to Network Rail's Strategic Themes

- **Long Term Demand Scenarios**

- **Conditional Outputs (passenger sectors)**
to meet the strategic goals, given the long-term demand scenarios, conditional upon value for money and affordability

2) Summary of the consultation responses – common themes

- 274 formal consultation responses, typically more detailed than for a RUS
- Several formal stakeholder meetings to discuss the consultation responses
- Numerous informal stakeholder consultations

- Broad support for the approach of the studies
- Recognition of the advantages over the previous approach
- Clearer understanding required of:
 - How the four studies interact
 - How the study deliverables will be used in the route studies
 - How some of the conditional outputs were developed
- Suggestions for further strategic goals/conditional outputs
- Queries about individual forecasts and outputs

3a) Long distance passenger market study key points from the consultation

- Better recognition of the role of leisure travel in supporting elements of the economy, and the demand for leisure travel at weekends
- Better recognition of the potential for long distance rail to compete with domestic airline travel
- Greater emphasis on connectivity between the South East (in addition to London) and elsewhere in Great Britain

3b) London and South East passenger market study key points from the consultation

Consultation responses were appreciative of the conditional outputs relating to connectivity, and many suggested examples for the LTPP to consider at the Route Study stage. Faster journey times to central London were a notable theme across many responses.

➤ Minor changes to the Draft for Consultation

- Update of London orbital forecasts
- Update of the conditional outputs relating to airport services
- An additional case study for the connectivity based conditional outputs
- An expanded section on connectivity and capacity for tourist attractions outside of the region's urban centres.

3c) *Freight market study key points from the consultation*

- General expectation of further growth in rail freight, overall, however some differences in views for Ports Intermodal, Domestic Intermodal and Channel Tunnel
 - Further work on these market sectors with the Working Group to inform the final study

- Recognition of the need for terminal investment to enable intermodal traffic growth
 - Study will note the need for spatial planning system to deliver terminals

3c) *Freight market study key points from the consultation*

➤ General understanding that Electricity Supply Industry traffic projections are based on Government (DECC) forecasts.

- Study will note that the outcome for growth in Biomass traffic could be different, due to a number of organisations still going through their decision making processes.

Market level forecasts will be allocated to routes in the final study document

Strategic goals

Economic growth

- by providing sufficient capacity for passengers
- by improving business to business connectivity
- by improving employee to employer connectivity
- by improving connectivity to/from the retail/leisure/tourism sector

Reduced environmental impact

- by reducing the use of less carbon efficient modes of transport

Improving the quality of life for communities and individuals

- by connecting communities and providing access to social infrastructure

Improving affordability and value for money

Long term demand scenarios (background growth + committed CP4/5 schemes)

Long Distance

30 year, max of c. 180% growth (3.5% p.a.)

10 year, max of c. 25% - 40% growth (2.3% - 3.4% p.a.)

Regional Urban

30 year, max of c. 115% growth (2.4% p.a.)

10 year, max of c. 37% - 49% growth (3.2% - 4.1% p.a.)

London and South East (peak)

max = c 1.5% p.a. with no current investment and substantially higher otherwise

Further long term investment = more growth

Conditional outputs - aspirations for 2043

Conditional outputs to meet the strategic goals
(economy, environment, quality of life)

Outputs relating to:

- **Connectivity** (total journey times) between locations
- Passenger **Capacity** required
- **Specific issues** for a market sector

Connectivity based conditional outputs - aspirations for 2043

	(Total) journey time reductions between	particularly between	where it is possible to
Long Distance	large urban areas	the largest GB towns & cities	achieve journey times of significantly < 2hrs
Regional Urban	clusters of residences and clusters of jobs	core cities and sizeable residential areas	achieve journey times of times of 20 – 60 mins
London and South East	both of the above	a) central London other locations, b) other large towns and cities	achieve journey times of times of 40 – 100 mins

Market specific conditional outputs - aspirations for 2043

Conditional outputs relating to:

- Access to long distance transport gateways
- Connectivity for the leisure market at weekends
- Access to social infrastructure
- Access to the rail network

Key conditional outputs identified for the Solent area

Conditional outputs to meet the strategic goals

Outputs relating to:

- **Connectivity** (total journey times) between Southampton and Portsmouth and Brighton and Bristol / Bournemouth
- Passenger **Capacity** required – primarily London commuting
- **Specific issues** – Southampton airport connectivity and intermodal freight growth from the Port of Southampton.

Example Cross Boundary outputs

Scenario 2 (with service from Wessex Route to HS2 at Old Oak Common)

Assumed passenger services:

1tph each way between Bournemouth and Manchester via Birmingham.

1tph each way between Southampton and Sheffield (may continue to Leeds or Newcastle) via Birmingham.

1tph each way between Basingstoke and London Paddington via Old Oak Common (may continue beyond Basingstoke, to be decided within Wessex RS).

2tph local services each way between Basingstoke and Reading.

Freight - TBA

5) *Next Steps*

- All Market Studies to be published at the end of October
- Cross Boundary Analysis ongoing
- Route Study programme has been finalised. Sussex and Wessex Route Studies due to commence in November.