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Agenda

- Northern overview
- Reflections on 2022 and the impact on our customers
- Challenges
- Demand, growth and the industry financial position
- The December 2022 timetable
- The future for Northern rolling stock
- Customer and accessibility improvements
- Stakeholder and community successes
- Strategic imperatives
- Questions

2600 services per day
(pre covid)

Call at
500+
stations

175



Parliamentary
constituencies



7,000
employees

24%
of Northern
routes electrified

Share network with
9 other operators



c85-90 million
Customer journeys per annum

2/3 of rail journeys in the north
are on Northern services

10 
maintenance locations



11 different
types of train

367
Trains

947
Vehicles



NORTHERN



50 stabling
locations

6 diesel
fleets

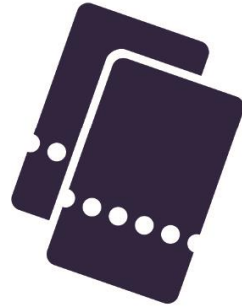
4 electric
fleets

1 bi-mode
fleet

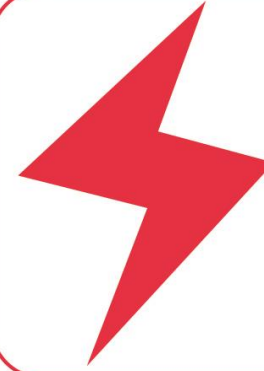




149 of our
467 stations
are staffed



Digital tickets
now make up **77%**
of total



27% of our
trains are powered
by **electric**

80% of our
trains are a
single unit



5% of our
services are in
excess of seated
capacity

90% of our
services have
spare capacity

95% of traincrew
in the North West
have Sundays outside
of the working week



£634m
subsidy to
operate this year

38p per passenger mile
subsidy – **33%** more
than pre COVID

Passenger
journey recovery
at **90%**



Social and economic value of Northern

Rail in the North matters – we contribute to regional economic growth



Employ nearly 7,000 people



Connecting people with employment, education and leisure



Every £1 invested in Northern generates around £2.50 of economic activity



Supporting the supply chain



Supports more than 20 community rail partnerships

Some of the main challenges

- Confidence in the industry has been dented
- Rostering disagreement with ASLEF in 2022 – significant impact on our customers
- National industrial unrest and subsequent reduction in colleague flexibility
- Other operators in the North West facing difficulties

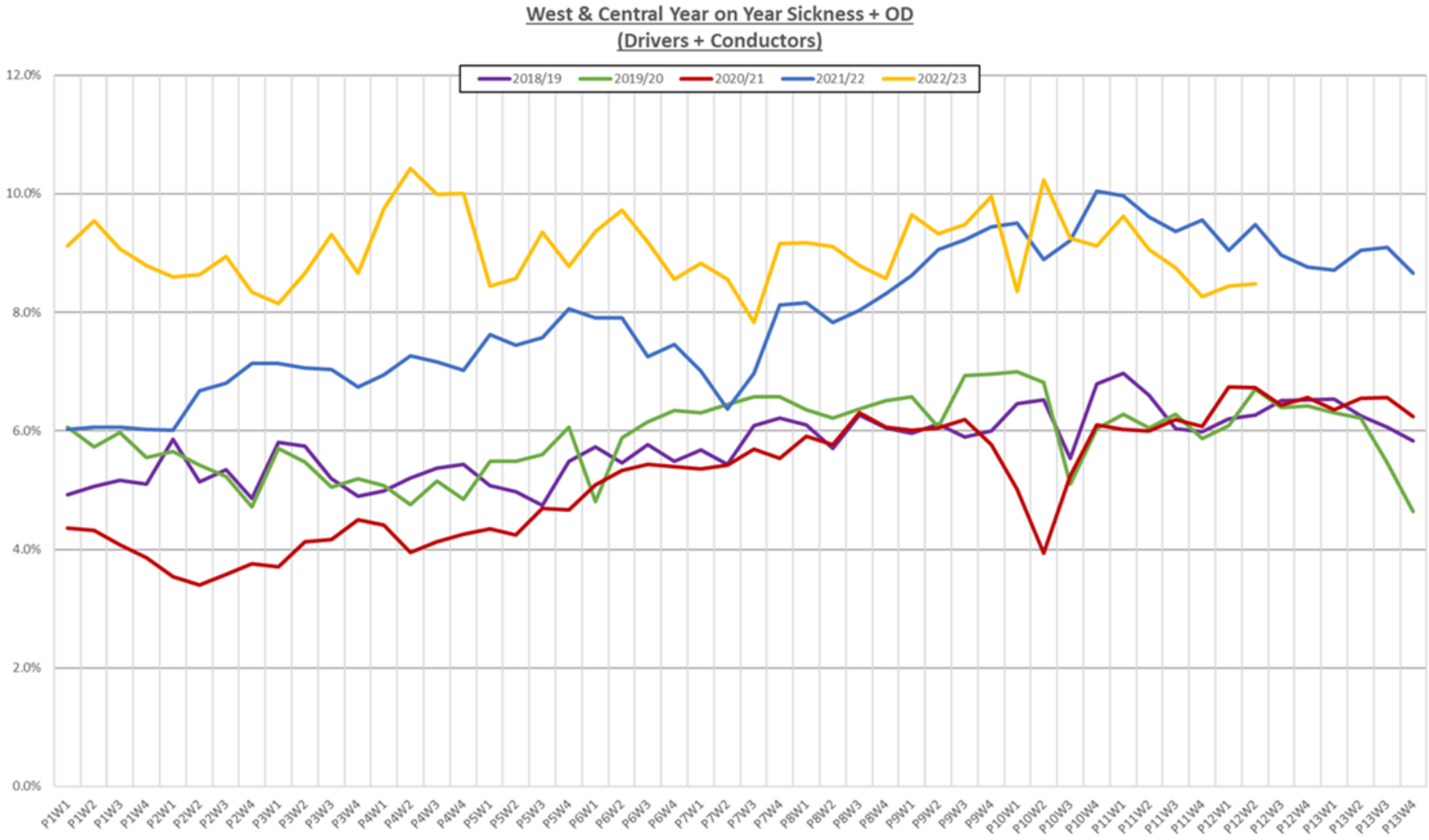
News • Greater Manchester News • Train

Train operators blasted over 'abhorrent, 11th hour' cancellations as late as 10pm the night before

TransPennine Express 'pulling between 50 to 80 trains a day' using so-called 'P-coding'

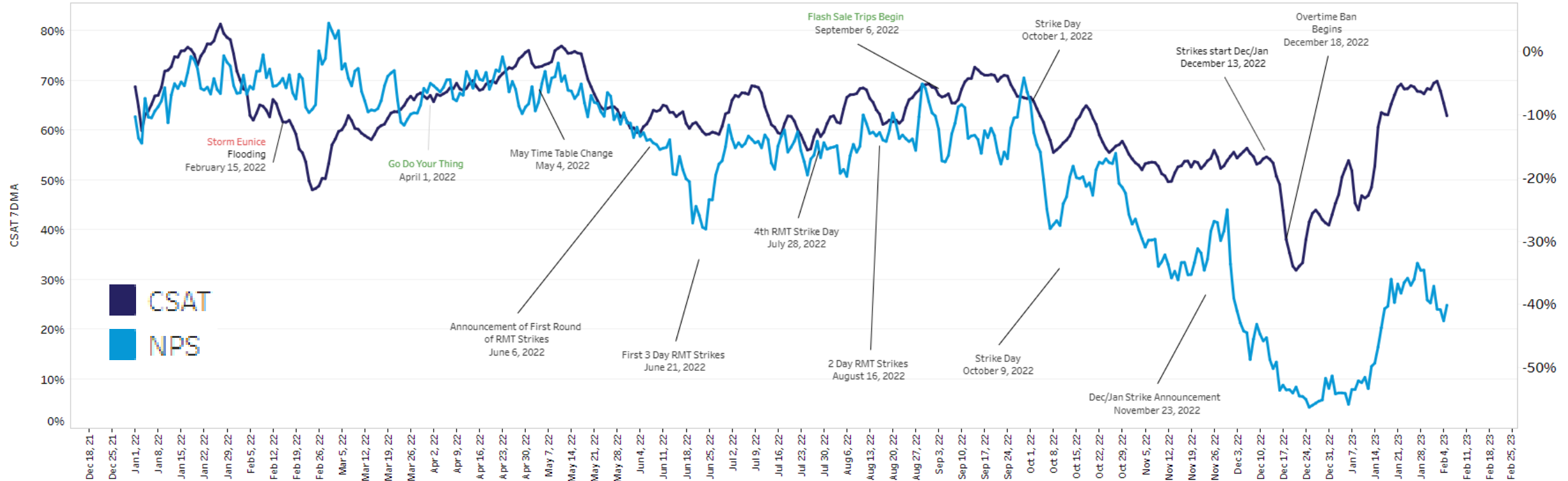


Absence levels and availability



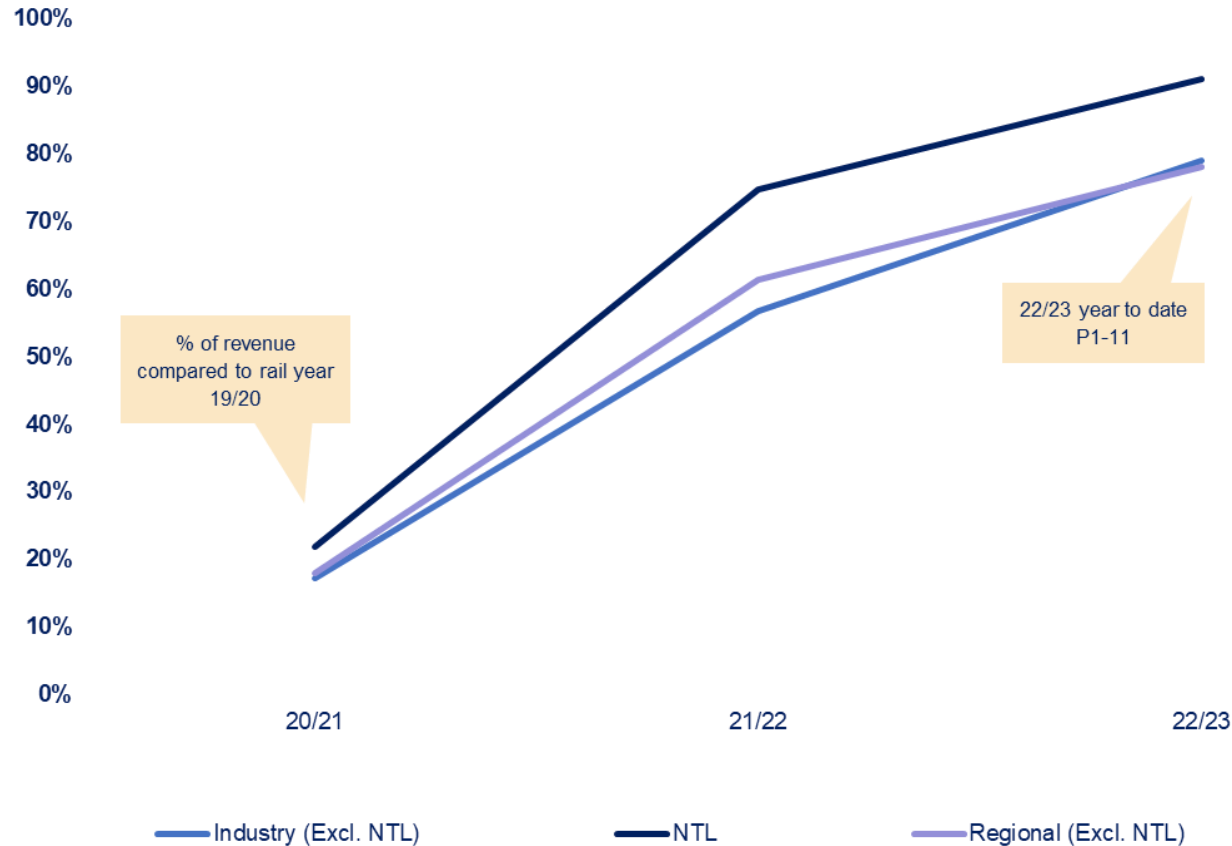
CSAT / NPS – customer sentiment

CSAT & NPS NTL



- **Top detractors:** Performance 67%, strikes 18%, value for money 16%
- Almost a quarter (24%) of customers who participated in the **GOV.UK research** agreed with the statement that they will no longer travel by train if the strikes continue for an extended period. This was most prevalent amongst frequent rail users, with 28% of those who travel 5 or more times a week by train agreeing.
- **Top promoters:** Performance 57%, staff 28% and cleanliness 26%

Demand, growth and industry financial position



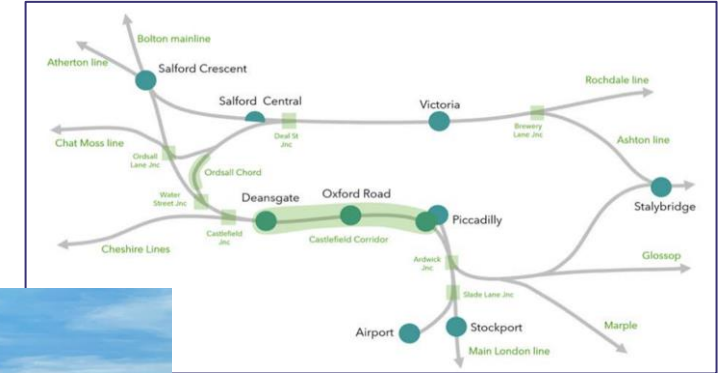
Leeds - Skipton - Hellfield - Settle - Appleby - Carlisle											
Mondays to Saturdays						Sundays					
Leeds	08:00	08:30	09:00	09:30	10:00	10:30	11:00	11:30	12:00	12:30	13:00
Skipton	08:15	08:45	09:15	09:45	10:15	10:45	11:15	11:45	12:15	12:45	13:15
Hellfield	08:30	09:00	09:30	10:00	10:30	11:00	11:30	12:00	12:30	13:00	13:30
Settle	08:45	09:15	09:45	10:15	10:45	11:15	11:45	12:15	12:45	13:15	13:45
Appleby	09:00	09:30	10:00	10:30	11:00	11:30	12:00	12:30	13:00	13:30	14:00
Carlisle	09:15	09:45	10:15	10:45	11:15	11:45	12:15	12:45	13:15	13:45	14:15
Leeds	14:30	15:00	15:30	16:00	16:30	17:00	17:30	18:00	18:30	19:00	19:30
Skipton	14:45	15:15	15:45	16:15	16:45	17:15	17:45	18:15	18:45	19:15	19:45
Hellfield	15:00	15:30	16:00	16:30	17:00	17:30	18:00	18:30	19:00	19:30	20:00
Settle	15:15	15:45	16:15	16:45	17:15	17:45	18:15	18:45	19:15	19:45	20:15
Appleby	15:30	16:00	16:30	17:00	17:30	18:00	18:30	19:00	19:30	20:00	20:30
Carlisle	15:45	16:15	16:45	17:15	17:45	18:15	18:45	19:15	19:45	20:15	20:45

- Challenging times
- Recovery would have been much stronger had it not been for strike action
- Northern continue to track above the regional sector in revenue recovery
- Subsidy per passenger mile of 38p for the network, up from 29p pre-COVID
- DalesRail

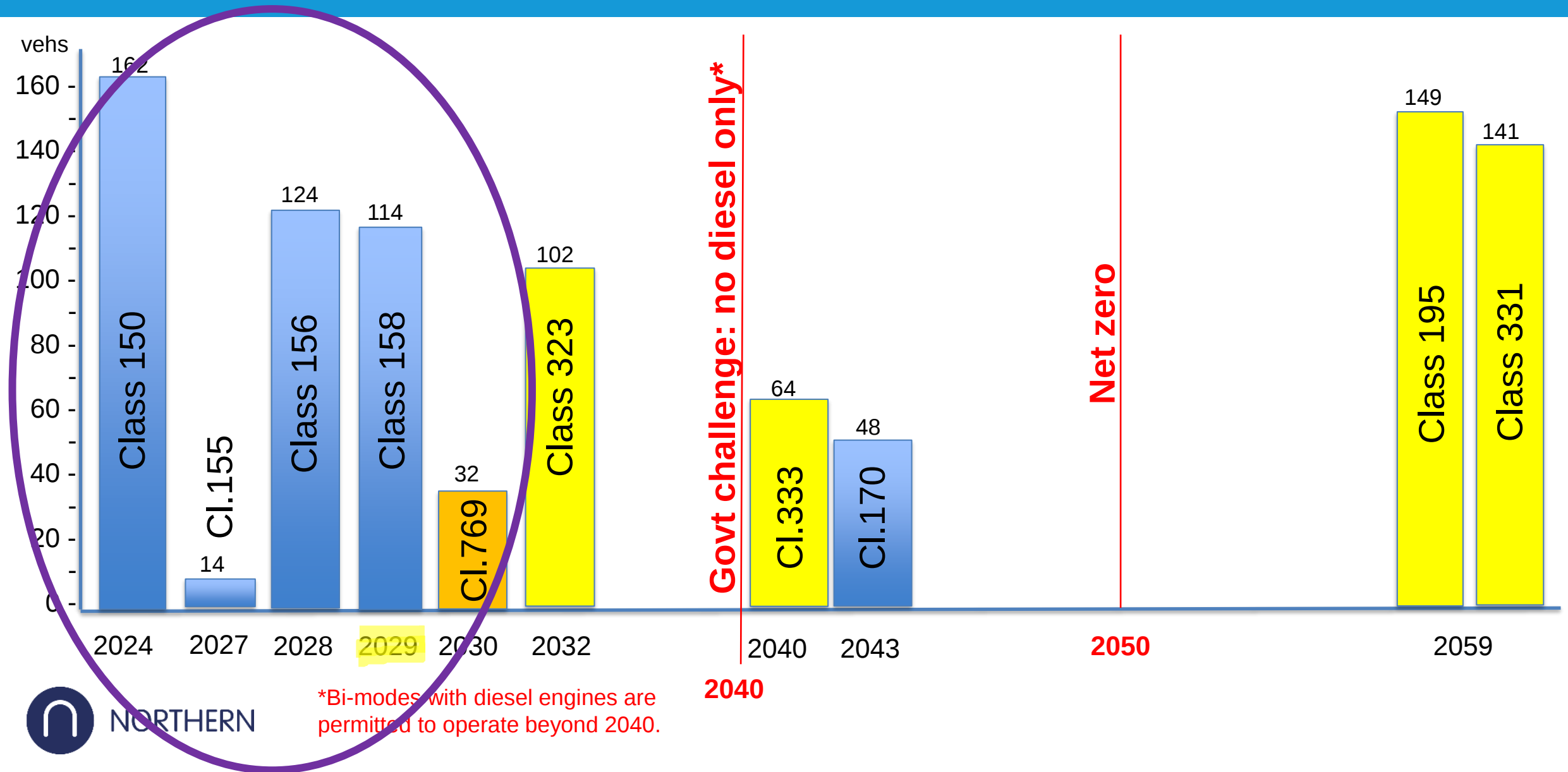
Go do your thing

Successful delivery of December 2022 timetable

- Full timetable re-cast – the final plan to "fix" the legacy of May 2018
- A new "base" for the North West
- Performance has improved
- 3,000 extra services per week
- 6 carriage trains in Cumbria
- Significant infrastructure works
- Platform extensions
- Enhancements to depots and outstations



Fleet replacement programme (assuming 40 year life)



Rolling stock strategy

- Actively in the market for new trains – testing market
- Life extension works on 15x fleet in the interim, and preparation for fleet cascades from other operators
- Phased approach to class 15x replacement between 2026 – 2029
- Replacement of around 60-70% of fleet before 2030
- Simplification through reduction in fleet types
- Much of the existing fleet is not ETCS compatible, nor would be cost effective to modernise
- Configurable platform is the way to go



A single configurable **electric** platform with three or four power variants



Conventional 25kV EMU

Battery / 25kV EMU

Hybrid EMU

Clean Diesel

Hydrogen

Key areas of focus for improvement

Connectivity

High customer expectations on speed, bandwidth and coverage especially in tunnels

Charging

Introduce USB and wireless capability, moving placement to above table height

Cleanliness

Bins designed to be more visual and increased capacity, including recycling

Accessibility

Level boarding is a clear expectation to support multiple user groups

Customer information

On screen displays are welcomed – addition of local information / events and CCTV

Storage

Increased luggage capacity required, including introduction of luggage racks

Cycling

Clear requirement for increase in space and safe stowage

Crowding

Requirements for additional grab rails in vestibules



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Go do your thing

Customer and accessibility improvements

Over 1,200 projects in the West and Central, with many already delivered or underway...



Stakeholder and community

- Thank you for working with us and for your collective support
- Best stakeholder satisfaction results on record
- Continued investment in community rail
- Numerous award wins, including
 - Community Rail Awards
 - Richard Watts, Julie Levy, Friends of Goostrey Station, Friends of Buxton Station, South East Lancashire Community Rail Partnership, Friends of Irlam Station
 - National Rail Awards
 - Bolton won in the medium station of the year category
 - Buxton was highly commended in the small station of the year category



Strategic imperatives and summary

1. Continue with our improving performance trajectory, and restore trust and confidence
2. Resolve the dispute, on the right terms for our customers and long-term industry sustainability
3. Adapt to changing customer needs and expectations
4. Embrace the objectives of GBR and increased local devolution
 - Value for money
 - Economic growth
 - Customers at the heart
 - Inspire our people
 - Strengthening communities
 - Clear accountability

Questions

