Creating a Station Experience that Meets the Connected Traveler's Expectations

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Consumers now expect to be connected when they want, wherever they are. Travel is no exception, and often a time when consumers need information the most. Too often, however, travelers view railway stations as a necessary evil to get to their destination, rather than a pleasant place to plan their journey or spend time (and money) while they wait.

In Europe, many stations are under pressure to be travelers’ gateway to cities, as well as meet the steady demand and growth of multimodal hubs. To do so, station operators will need to find new avenues for profitable revenue growth and redefine their role and the passenger experience in the 21st century.

In 2012, Accenture conducted a survey in eight countries to better understand the behavior and expectations of Western European rail passengers.¹ With questions ranging from booking to arrival, including the overall station experience, the survey sheds light on how rail companies can capitalize on the opportunities and challenges resulting from new consumer trends.

What’s clear is that consumers are demanding change, and station operators need to transform their services accordingly. Drawing on the survey conclusions, we examine two key ways in which station operators can meet consumers’ evolving expectations while potentially maximizing revenue opportunities:

• Station managers need to improve core station services using new technologies to boost in-station services
• Once station managers have perfected these core station services, they could maximize the revenue opportunities from all aspects of station operations

¹ In September 2012, Accenture conducted a Western European rail survey, interviewing 4,211 frequent and non-frequent travelers from the United Kingdom, Italy, Spain, Germany, France, Switzerland, Belgium and the Netherlands. The sample was composed of 18-to-74-year-old passengers who take at least one trip over 40 kilometers by train (inter-city or high-speed train) per month. Please note, however, that results from Switzerland were not included in the European average. Swiss data should be interpreted as separate from the overall European average given.
Improve Core Station Services with New Technologies

New technologies can transform railway stations from places that passengers endure to focal points for planning and enhancing the travel experience. Video analytics, facial recognition, interactive signage and social media can offer real-time information updates and better navigation to enhance the traveler’s in-station experience. Technologies can also help tackle maintenance issues that can mar the travel experience. The following sections illustrate how operators can use some of the technology-enabled services in Figure 1 to transform stations.

Real-time travel and station information on mobile devices

The majority of survey respondents indicated that they would like to receive real-time access to travel information on their mobile device to make their journey easier and use their time more wisely. (See Figure 2.) Airports already use smartphone apps and social media to push out targeted travel-related information to passengers. Liverpool Airport, for instance, has developed a mobile app providing real-time information on flights and schedules, shopping, car parking, and airport facilities. Such technology could be easily adapted by rail station operators to communicate with passengers.

Ease navigation—and improve security

Many of the technologies like interactive navigational signage/maps, video analytics, smartphone apps or GPS navigation can help enhance passenger circulation, with the added benefit of improving security. Video analytics can manage pedestrian traffic flow and navigation in real-time, as well as detect suspicious movements of groups of people, so that issues can be addressed immediately.

In the United Kingdom, for instance, Network Rail teamed up with Google to add some of its largest stations to the Google Maps Street View application. Dubai Airports uses interactive signboards, allowing passengers to access gate and flight information as well as retail and hotel reservations.

Improve station maintenance

Passengers—even if they know where they are going—might be frustrated or prevented from traveling if elevators, escalators or moving walkways do not work. By using preventive maintenance or collaborative maintenance systems, station managers could optimize the total cost of ownership, ensure access for all visitors, and improve the customer experience.

Rail operators can use other technology to keep machines up and running, rewarding (via points) travelers who flag broken-down machinery by texting or tweeting a picture of the equipment. Passengers can also use the same means to report messes in the station.
Once stations have mastered the “basics” in delivering in-station services for travelers, they can potentially spur revenue growth by improving waiting areas, creating a convenient and varied retail environment, and capturing the value of under-used space and assets.

Enhance the waiting zones to help generate demand

The Accenture survey shows that 79 percent of passengers were dissatisfied with station waiting areas. Survey respondents would like to see more seating and waiting areas provided in stations, good signage about train information, and special areas to access Wi-Fi or make private phone calls.

To further enhance the passenger experience, operators may want to consider creating separate waiting areas with related retailers and services clustered nearby that meet traveler segment needs: family/young adult areas, restaurant/food court areas, and office areas and meeting rooms. Clustering relevant retailers and service points in segment waiting zones will help to generate demand by increasing the likelihood that visitors spend more time (and money) in the station.

Making stations a focal point for shopping

Station operators are missing a trick by neglecting to draw in the 22 percent of travelers who say they never shop in stations. (See Figure 3.) Too many travelers view stations as a place to pass through on the way to somewhere else rather than a destination in and of itself. As gateways to the city and aspiring multimodal hubs, station services should appeal to consumers more broadly, not just travelers.

To draw in local residents, entice those waiting for arriving passengers, and encourage travelers to allocate more of their door-to-door journey time to shopping, operators can transform stations into an attractive space, like a shopping mall, with enhanced surroundings, better lighting, and more varied retail outlets that meet the needs of varied consumers. Attracting retailers that offer the kinds of products and services highly valued by station passengers and local residents can also help drive up commercial space rents.

The survey results indicate scope for station operators to make the following changes in order to improve the shopping experience and boost sales:

- Establish digital retail options to increase traveler convenience: For instance, Tesco and Peapod offer passengers a chance to order items on touchscreen displays at stations and have them delivered to their homes. This could be an interesting option for owners/operators of small stations with limited retail space. In the airline industry, the B4 You Board smartphone

Figure 2. Types of information that passengers like to access in real-time on mobile devices

Question: How interested would you be in receiving the following real-time information on your mobile devices (laptop, mobile phone, tablet, etc.) to help you find your train?

<table>
<thead>
<tr>
<th>Information</th>
<th>Somewhat interested</th>
<th>Very interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alert on any change to train schedule or platforms</td>
<td>30%</td>
<td>52%</td>
</tr>
<tr>
<td>Information on platform of my train</td>
<td>36%</td>
<td>41%</td>
</tr>
<tr>
<td>Carriage class location</td>
<td>33%</td>
<td>25%</td>
</tr>
<tr>
<td>Information on obstacles between me and my gate (stairs, crowding, requirement to go to another wing/level of station)</td>
<td>33%</td>
<td>25%</td>
</tr>
<tr>
<td>Length of lines at platform entrance</td>
<td>31%</td>
<td>19%</td>
</tr>
<tr>
<td>GPS guidance and expected time to my platform</td>
<td>27%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Source: Accenture 2012 Western European Rail Survey

Maximize Potential Revenues from All Aspects of a Station’s Operations
app allows air travelers to order meals in advance and have the food waiting for them at the gate.

- Provide quick and easy shopping for time-strapped travelers: For travelers concerned about missing their trains, station operators should focus on retailers that are able to serve customers very quickly and offer services like gate delivery.

- Pick retailers who will draw in the local community: Stations should seek out a range of retailers to meet the requirements of local residents. Retailers and eateries that appeal to locals could be as important for sustained growth in retail revenue and the rental value of station commercial space as attracting retailers relevant to rail passengers.

When selecting station retailers and developing related services, it is important for station operators to analyze the consumer and traveler segments they are targeting first.

**Monetize non-commercial assets**

Station operators need to become asset managers, not just platform operators. With property in prime locations in many European cities, rail operators can use more creative means to make money from their non-commercial space (roofs, signage, and common space) and assets. For instance, space unsuitable for retail can be turned into short-term office rentals, videoconferencing facilities or health centers. Rooftops can be made into commercial space for rent to restaurants or clubs. Or, they can be leased to energy providers looking for space to place solar panels. This money can help recoup infrastructure and technology investments to improve the station environment and services.
Positioning as Gateway to the City

Technology will be a crucial enabler to meet the evolving requirements of connected travelers. New revenue opportunities can make the stations more appealing while funding technology and infrastructure investments necessary to position stations as the gateway to the city. As such, railway operators can maximize the convenience and comfort for connected travelers and create a seamless door-to-door journey.
Methodology

The Western European rail survey interviewed 4,211 frequent and occasional travelers from the United Kingdom, Italy, Spain, Germany, France, Switzerland, Belgium and the Netherlands. Please note, however, that results from Switzerland were not included in the European average. Swiss data should be interpreted as separate from the overall European average given. The sample was composed of 18-to-74-year-old consumers who take at least one trip over 40 kms by train (inter-city or high-speed train) per month. Of the respondents, 24.5 percent (1,032 respondents) make more than four trips per week. The data was collected online during September 2012, and questions about passenger rail service spanned from booking to arrival.

About Accenture

Accenture is a global management consulting, technology services and outsourcing company, with 259,000 people serving clients in more than 120 countries. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world’s most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments. The company generated net revenues of US$27.9 billion for the fiscal year ended Aug. 31, 2012. Its home page is www.accenture.com.

Accenture’s survey reveals many more findings that may be of interest to station operators and can be shared upon request.

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