Station Strategy 2.0

-First-Last Mile and station offers

In collaboration with DSB's Real Estate division (Ejendomme)

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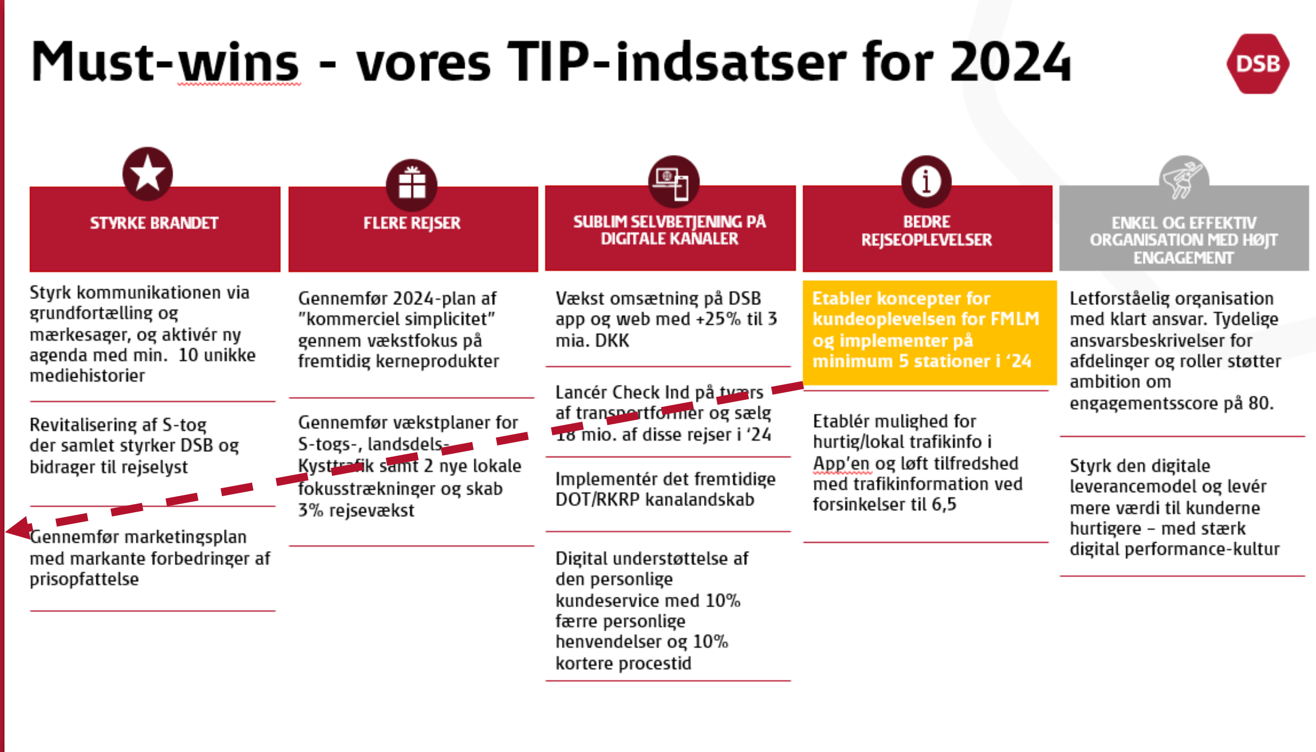
SHAREDIMOBIHUB APRIL 2025

BETTER TRAVEL EXPERIENCES

Establish concepts for the customer experience for FMLM and implement them 5 stations in 2024.



Commercial aspiration 2024

"ON THE WAY TO 500.000 GOOD TRAVEL EXPERIECES EVERYDAY"

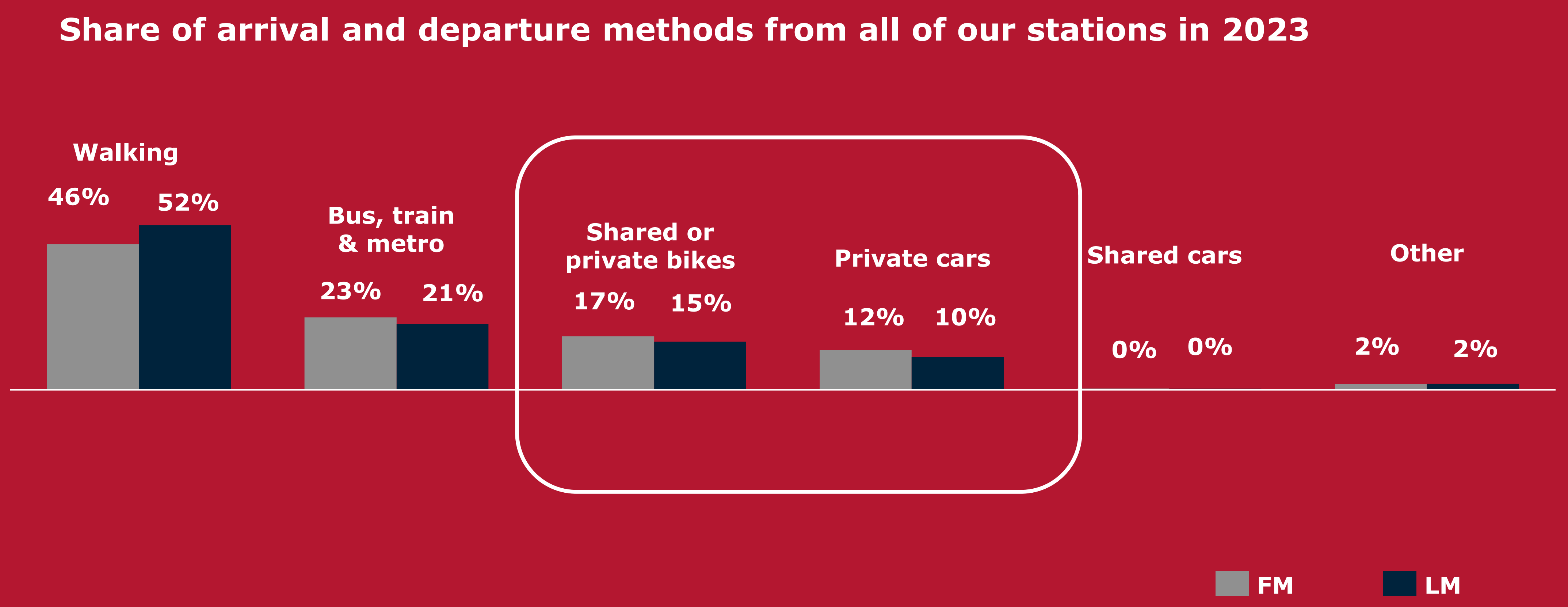
2024

3%

INCREASE IN TRAVELS COMPARED TO 2023

Door-to-door travel time is the most important variable for customer’s choice of transport!

What do we know about our customers behaviors today?

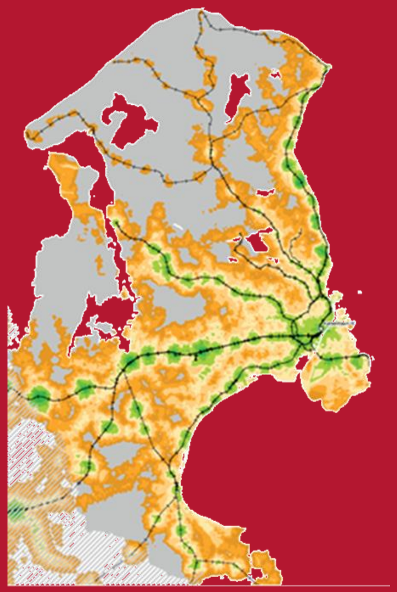


Where can we expand our relevance?

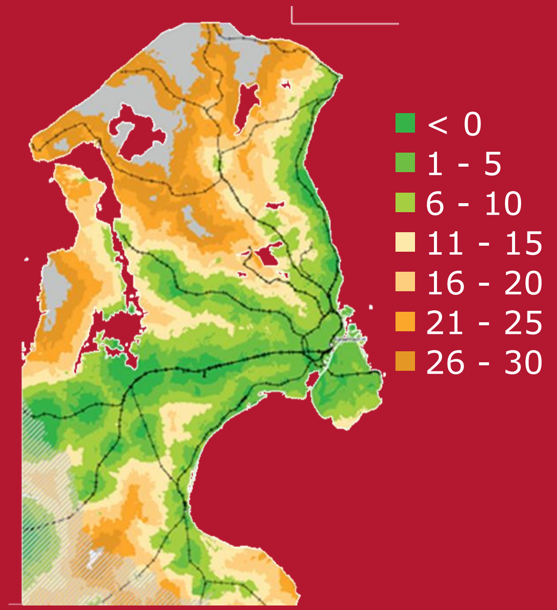
Combining the bike and train can dramatically reduce travel time and make the train more relevant

Average travel with S-train

	1 km	12 km[1]	1 km	combined
	14 min	16 min[1]	14 min	= 44 min
	4 min	16 min[1]	4 min	= 24 min



Walking- first mile



Bike- first mile

What was the scope of Station Strategy 2.0?

Customer experience to/from the station

- What is the relevant **segmentation of stations** in relations to **identifying and prioritizing** focus stations for FMLM solutions?
- Which **FMLM services** are there a need for and for which segments?
- How should the station offers be **implemented**? What should **DSB** look for and what should we get from **external suppliers**?

Customer experience at the station

- What is the relevant **segmentation of stations** in terms of identifying and prioritizing focus stations for efforts to improve the station offers?
- What **customer facilities** should be offered (e.g. toilets, waiting areas, etc.) within each station segment?
- What is the best **layout of the station** in terms of customer-facing offerings (information, wayfinding, etc.)?

The scope of our analysis focuses on DSB's 100 largest stations, which account for ~90% of the total number of journeys at DSB.

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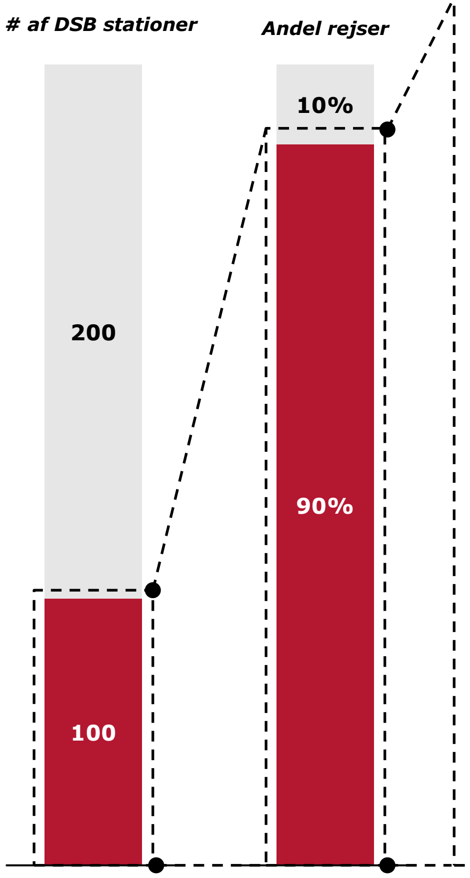
Overview of DSB’s 100 largest stations measured by travels over the previous year[1]



	Station	Påstigninger		Station	Påstigninger		Station	Påstigninger		Station	Påstigninger
1	København H	1.697.740	26	Herlev	120.617	51	Bagsværd	65.110	76	Gentofte	48.525
2	Nørreport	1.157.718	27	Ny Ellebjerg	120.261	52	Kbh Lufthavn	64.597	77	Middelfart	47.022
3	Østerport	409.605	28	Ishøj	113.192	53	Brøndbyøster	64.026	78	Ålholm	46.529
4	Valby	375.450	29	Ryparken	108.489	54	Greve	62.599	79	Nivå	46.318
5	Hellerup	331.199	30	Køge	105.085	55	Horsens	61.603	80	Stenløse	45.945
6	Roskilde	300.365	31	Slagelse	104.841	56	Hvidovre	61.429	81	Grøndal	44.485
7	Odense	298.062	32	Vejle	98.810	57	Brøndby Strand	61.326	82	Jægersborg	43.435
8	Lyngby	269.047	33	Birkerød	96.446	58	Charlottenlund	60.622	83	Espergærde	43.359
9	Århus H	262.940	34	Helsingør	94.695	59	Nyborg	60.408	84	Virum	43.025
10	Høje Tåstrup	256.617	35	Trekroner	93.645	60	Farum	60.311	85	Sorgenfri	39.490
11	Vesterport	244.574	36	Aalborg	93.584	61	Køge Nord	60.001	86	Esbjerg	39.416
12	Dybbølsbro	215.426	37	Allerød	89.430	62	Frederikssund	58.083	87	Ølstykke	37.071
13	Fredericia	210.008	38	Sydhavn	87.432	63	Malmparken	57.957	88	Nykøbing F	35.405
14	Nordhavn	200.023	39	Holbæk	83.268	64	Måløv	57.615	89	KB Hallen	35.165
15	Hillerød	177.619	40	Tåstrup	82.436	65	Avedøre	57.369	90	Karlslunde	35.528
16	Svanemøllen	169.397	41	Holte	81.022	66	Solrød Strand	56.731	91	Vordingborg	31.128
17	Næstved	168.377	42	Friheden	79.951	67	Vallensbæk	55.900	92	Hvalsø	27.402
18	Flintholm	166.463	43	Sjælør	78.689	68	Humlebæk	55.529	93	Skanderborg	26.891
19	Ringsted	163.788	44	Kolding	76.353	69	Emdrup	55.322	94	Rungsted Kyst	25.511
20	Glostrup	162.720	45	Hundige	75.253	70	Ordrup	54.683	95	Danshøj	25.263
21	Nørrebro	162.244	46	Husum	74.687	71	Ølby	53.928	96	Tølløse	25.071
22	Vanløse	153.668	47	Buddinge	73.926	72	Skovlunde	53.268	97	Snekkersten	23.416
23	Ballerup	140.938	48	Kokkedal	73.127	73	Værløse	52.987	98	Ørestad	22.492
24	Carlsberg	123.470	49	Bispebjerg	69.129	74	Fuglebakken	52.430	99	Herning	14.663
25	Albertslund	121.513	50	Rødovre	67.314	75	Vigerslev Allé	50.889	100	Tårnby	13.580

Noter: 1) Antal rejser er baseret på antal påstigninger pr. måned for 2023 (jan-nov) både for S- og F&R-tog
Kilder: DSB data på top 100 stationer; IM analyse

Three themes that support growth and the good customer experience

DSB

Theme	BETTER AND SAFER PARKING	MORE SHARED MOBILITY	MORE COMFORTABLE STATIONS
Station services	**A PRIVATE BIKE PARKING** Travelers can safely and easily park their bicycles in locked and unlocked easily accessible and marked areas.	**C SHARED PEDAL BIKES** Travelers can easily and intuitively access and hand over shared bikes at last-mile stations.	**F WAITING AREAS** Travelers have the option of staying safe and sheltered from the weather, as well as the option of sitting down and waiting.
	B CAR PARKING Travelers can park cars in marked, easily accessible parking areas, located close to the station, incl. taxi and carpool parking.	**D SHARED E-BIKES OR E-SCOOTERS** Travelers can easily and intuitively access and hand over shared electric bicycles and electric scooters at last-mile stations.	**G RESTROOMS** Travelers have the opportunity to access and use a toilet when staying at the station.
		E SHARED CARS Travelers can easily and intuitively access and drop off shared cars at selected last-mile stations.	

Segments enabling scaling

DSB

Distribution of stations across segments

Segment	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5	Segment 6
Segment description	*Segment 1 are stations characterized as strategically important and large stations that require special attention.*	*Segment 2 are stations characterized by a catchment area with a large proportion of homes and businesses that are primarily a long distance from the station.*	*Segment 3 are stations characterized by a catchment area with both housing and businesses that are primarily a short distance from the station.*	*Segment 4 are stations characterized by a catchment area with a large proportion of homes that are primarily a long distance from the station.*	*Segment 5 are stations characterized by a catchment area with a large proportion of homes that are primarily a short distance from the station.*	*Segment 6 are stations characterized as small stations that must only have basic station offers with existing infrastructure.*
Station ideal	*We will offer the widest range of station offers, specifically adapted to the individual station.*	*We will offer a combination of shared mobility solutions such as (electric) bicycles, electric scooters, shared cars as well as private parking for cars and bicycles.*	*We will offer different parking options for private bikes and shared bikes.*	*We will offer various parking options for both private bicycles and cars.*	*We will offer different types of private parking for private bicycles.*	*We will offer basic parking infrastructure for cars and bicycle parking.*
Relevant station services	**CUSTOMIZED TO THE INDIVIDUAL STATION** **(Copenhagen Central Station, Nørreport)**	A **PRIVATE BIKE PARKING** B **CAR PARKING** C **SHARED BIKES** D **SHARED E-BIKES OR E-SCOOTERS** E **SHARED CARS**	A **PRIVATE BIKE PARKING** C **SHARED BIKES**	A **PRIVATE BIKE PARKING** B **CAR PARKING**	A **PRIVATE BIKE PARKING**	**EXISTING INFRASTRUCTURE**

Birkerød

Hillerød

Lyngby

We selected 6 ”test stations” as starting points when we start our FMLM and station services efforts.

Hellerup

Høje Taastrup

Skanderborg

Example I **Hillerød**

DESIRED STATION

Hillerød is characterized by a surrounding area with a large proportion of dwellings and jobs that are far from the station. Therefore, we believe we can ensure more journeys by adding desired station services and improving physical conditions:

- *Clearing abandoned bikes*
- *Services for both private citizens and employees*
- *Physical condition improvements*

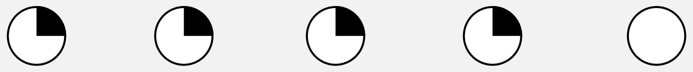
Customer satisfaction in comparison to other stations

[7,4] på Hillerød

[7,5] avg. for DSB station portfolio

PRIMARY TRANSPORT TO STATION

Primary travel to/from the station



Walking | **Private bike** | **Private car** | **Other public trans.** | **Shared vehicle**

How much transport to the station:

Almost not at all — Primary

FEASIBILIY FOR CHANGES

Political initiatives and allocated financial resources

We own and operate some bike parking. The municipality also manages some bike parking on our land, so it could be that we need to change previous agreements to take over bike parking management on our land.

Hillerød is an end train on the S-train network and has funding for improvements.

Unique situations

- Planned construction from 2026-28. Extension of tunnels and tracks.
- We own and manage bike parking on our land while they also manage a share of the bike parking.
- Covered bike parking has a very low and old roof in need of repair.

Example: For segment 2, we'll offer various mobility services, as well as bike and car parking

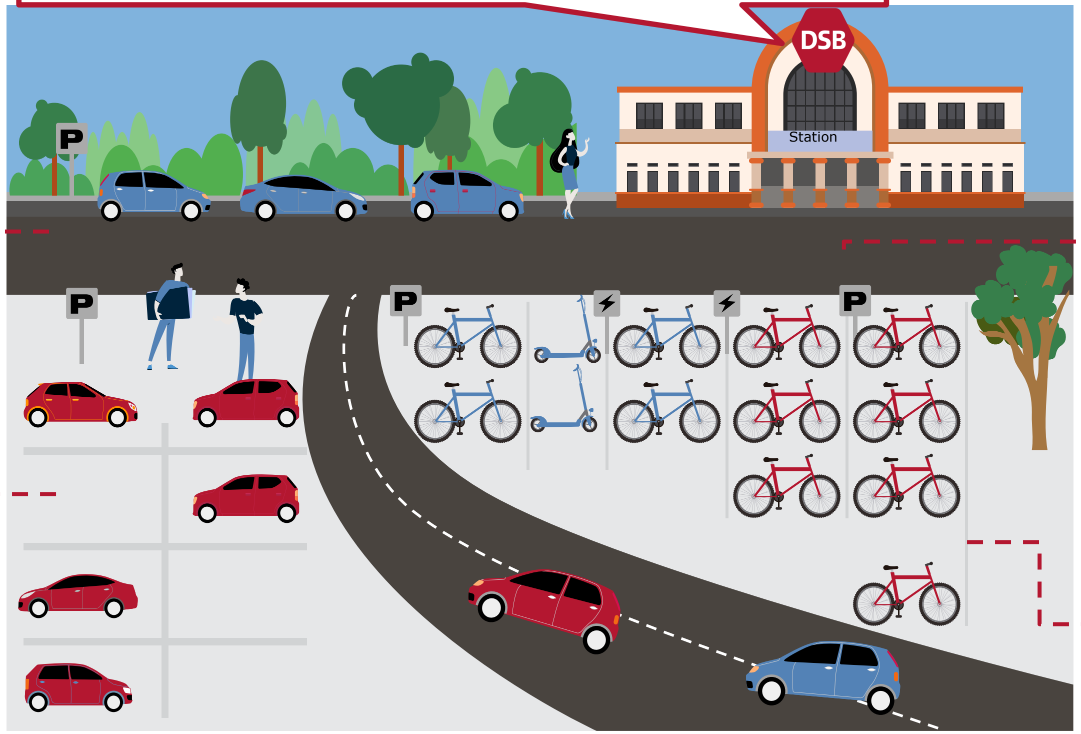
Shared vehicles

Customers can easily find a shared car or carpooling option from different providers (Nabogo, Green Mobility og lign.)[1]

Car parking

Customers can easily park their own car, carpooling vehicle, shared cars, or take a taxi. There is also the option to charge E-vehicles[2]

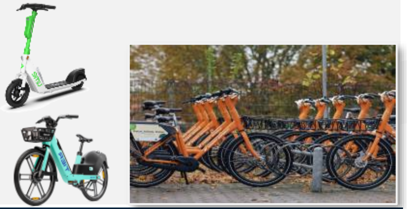
Toilets and waiting areas are expected to be included in these stations



Wayfinding, traffic info screens, surveillance, and lighting will be everywhere there is parking, shared vehicles and other service offers.

Shared mobility (e-scooters and (e-)-bikes).

Customers can easily access a vehicle from Donkey Rebulbic, Lime, DOTT, Bolt[3]



Bike parking

To start, forgotten bikes will be cleared as appropriate. Customers can safely park their bikes in either unlocked or locked racks. Some racks are covered, have charging capabilities, and bicycle service repair stands.

Note: 1) Delemobilitet kan inkludere GoMore, Kinto, Let's Go, Hyre, Green Mobility, ShareNow; Nabogo men kræver markedsdialog for endelig beslutning af partner; 2) El-ladestanderer kan inkludere PowerGo og Clever; 3) Parkering af delecykler og el-løbehjul er både fritstående og/eller optegnet ved stativer

Kilde: Projektteam analyse

Step 1. I **Hillerød Station map of existing conditions**

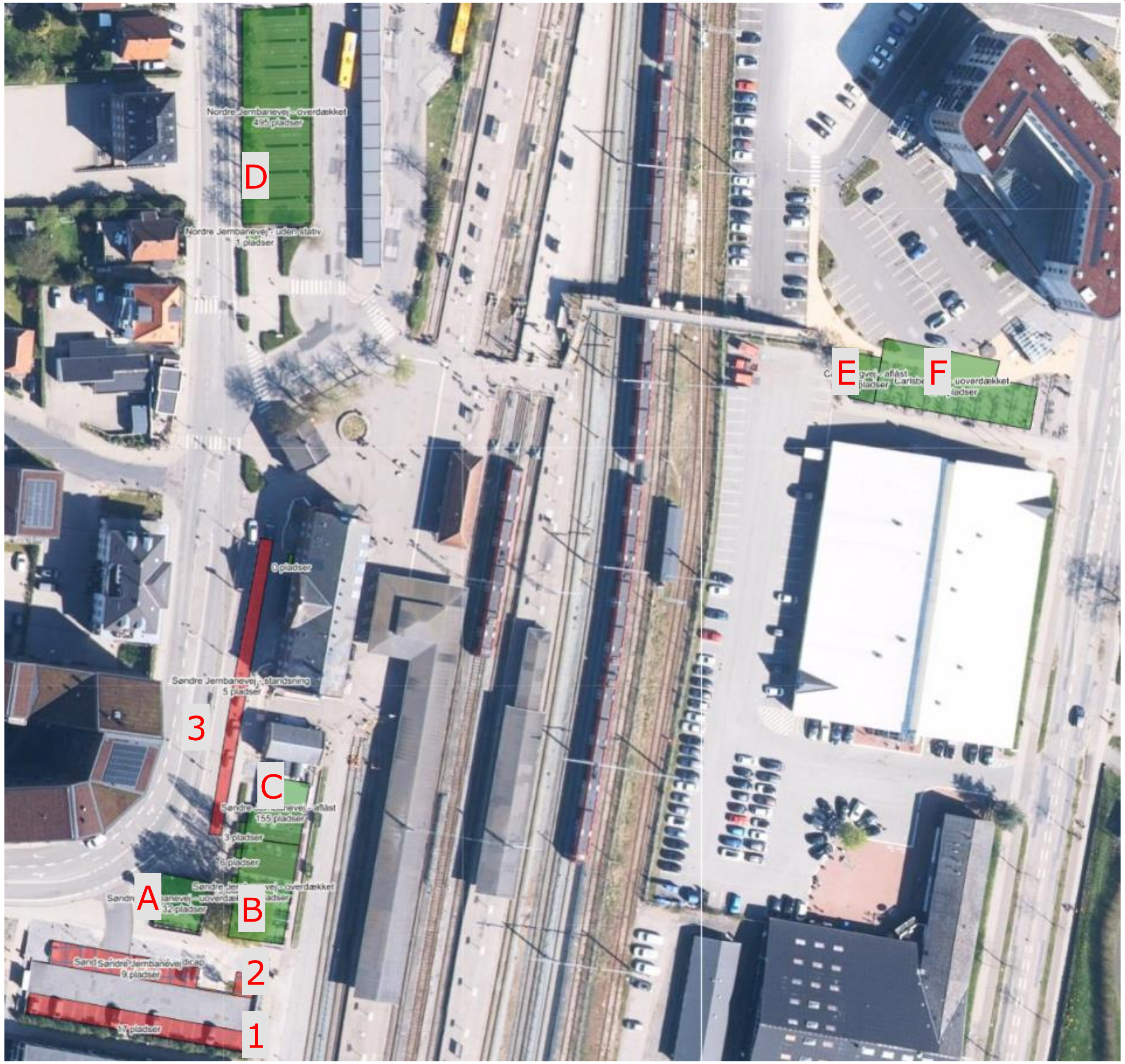
Overview of station today

→ Car parking*

1. 30-min. (7/17) HK
2. Apcoa (3/9) Privat
3. 30-min. (2/5) HK
4. Unlimited (354/366) HK (10-min. walk south)

→ Bike parking

A. Normal racks (82/132) HK
B. Covered (193/222) HK
C. Locked (56/155) DSB
D. Covered (160/495) HK
E. Locked (34/72) DSB
F. Normal racks (270/374) HK



4 ↓ Large parking lot

*There was previously a large car park on the right side of the map for 300 cars, that was always filled.

Step 1. I **Hillerød Station – Existing parking and shared mobility & station offers**

CURRENT OFFERS (AS-IS)

Bike parking

Unlocked bike parking

- Many forgotten bikes

61%


Locked bike parking

40%


Car parking

Private car parking

- 10 minute walk south from the station

97%

Carpooling and shared vehicles

N/A

N/A

N/A

Shared vehicles

Shared vehicles

- Donkey Republic (12 cykler)

5-13 DAUs

Toilet

- In good condition

Waiting room

No notes

Noter: Parkering og fysiske rammer er rapporteret på to separate slides, der her er sammensat for at skabe ét overblik. Den oprindelige version findes i Appendix

Step 2. l **Hillerød Station- desired conditions**

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Overview of potential placements of new services to be sent to Ejendomme

Beskrivelser af nye stationstil bud	***Hvordan fungerer servicen samt ønsket kunde interaktion***	***Placering og antal***
Privat cykelparkering 2. Ikke aflåste cykelstativer	Kunder ankommer på egen private cykel og sætter i 'normale' cykelstativer uden lås, men låser med cyklens egen lås.	Område A, B, D renoveres
Privat cykelparkering 3. Aflåst cykelstativ med indbygget lås	Kunder ankommer på egen private cykel og kan låse deres cykel fast til et stativ, som har en indbygget lås pr. cykel.	Område C, E
*Privat cykelparkering 4. Cykel el-ladestander**	Kunder ankommer til stationen og kan lade sin cykel op mens de er på arbejde eller væk med andet formål. Kunderne skal have abonnement til el-ladestander leverandør, så de selv betaler for elektriciteten brugt.	Område B, D, F
Privat cykelparkering 5. Cykel service- og reparation	Kunderne kan fikse eller pumpe egen private cykel enten ved ankomst eller afgang fra stationen.	Område D, F
Privat cykelparkering 6. Opbevaring til cykelbatterier	Kunder med el-cykler kan opbevare deres batterier i et skab mod betaling. Kunden kan maks. have skabet i X antal timer adgangen.**	Område C, E
Delecykler	Kunder kan tilkøbe sig adgang til en delecykel via enten sin arbejdsplads (b2b ordning) eller privat (b2c). Cyklerne kan kun startes og afsluttes ved hubs omkring stationen for at undgå at cyklerne ender over det hele.	Område B, D, F
Delecykelparkering 1. Ikke aflåst parkeringsstativ 2. Optegnet parkeringsområde	Der opsættes 'normale' stativer, men optegnes med maling for at markere at det kun er her, kunderne kan parkere delecyklen. Samme område markeres og geofences i leverandørens app for at sikre at kunderne afleverer cyklerne i de rette områder.	Område B, D, F

Beskrivelser af nye stationstilbud	***Hvordan fungerer servicen samt ønsket kunde interaktion***	***Placering og antal***
Sanitet	Kunden skal kunne tilgå toilettet let	I stationsbygningen
Venteareal	Tilføje bænke til stationsbygning	Ejendomme må gerne komme med forslag
Skærme med trafikinformation	Skærme med trafikinformation skal hjælpe vores kunder med at finde det rette tog og spor samt afhjælpe stress, så kunden ved, hvor meget tid der er til næste afgang af det tog, som de skal med.	1. En skærm ved cykelparkering B/C, D, E/F 2. En skærm ved bilparkering 4
Wayfinding og skiltning	Skal være med til at hjælpe kunderne finde vores forskellige services.	På perronen, i tunnelen, begge side af broen, i stationsbygning (Kommer an på ombygning)
Markering	Markering på jorden skal være med til at sikre at kunderne ved hvor de kan hente og aflevere delemobilitets køretøjer. Dette i samspil med leverandørernes virtuelle geofencing i deres apps er med til at sikre at køretøjer ikke placeres uønskede steder.	B, D, eller F
Belysning	Der skal være god belysning på alle områder, så vores kunder føler sig trygge.	Alle områder
Overvågning	Generelt ønske om overvågning ved alle parkeringsarealer. Hvis ikke muligt, så kun områderne med privat cykelparkering.	Alle områder

*There was previously a large car park on the right side of the map for 300 cars, that was always filled.

To prioritize the rollout of new services and amenities at the top 102 stations, we are using available funding, feasibility, and FMLM potential

Description of prioritization parameters

Relative importance	Category	Parameter	Description	Drivers for prioritization
High	Funding and fesibility	*Funding*	*Stations where we have received funding or have other ongoing, local efforts*	*If a station has allocated funds for improvements, it should be given top priority as it determines whether we can work with the station or not.*
	Funding and fesibility	*Local efforts*	*Stations where we have ongoing, local efforts*	*If a station has ongoing local efforts, it can have a major impact on how we can work with the station*
	Funding and fesibility	*Station-modernization*	*Stations where modernization projects are planned or ongoing affect the possibility and timing of establishing new services*	*If a station has coming modernization efforts that limit access or use of areas at the station, it should be taken into account*
Low	Potential factor	*FMLM potential*	*Stations where there are FMLM potential*	*If a station has a high potential for FMLM solutions, it should then be prioritized highest, as it can give us the biggest increase in passenger numbers.*

Rollout logic

We roll out stations based on financing, feasibility, and FMLM potential:

- **Financing (public funding):** For each station, it has been assessed wehther pool funds or local efforts are available and prioritized accordingly
- **Feasibility:** For each station, an assessment has been made of whether moderniztion work will occur towards 2030. Station offers with modernization are rolled out either before or after the work and completed.
- **FMLM:** For each station, a detailed analysis has been developed as a proxy for how much a station can grow.

Noter: 1) Teststationer er valgt ud fra segmentrepræsentation og inkluderer lokalindsatser (se oversigt over teststationsvalg); 2) Se appendix for fuldt overblik af FMLM potentiale på stationer
Kilder: Projektteam analyse

Hillerød- FMLM potential Map

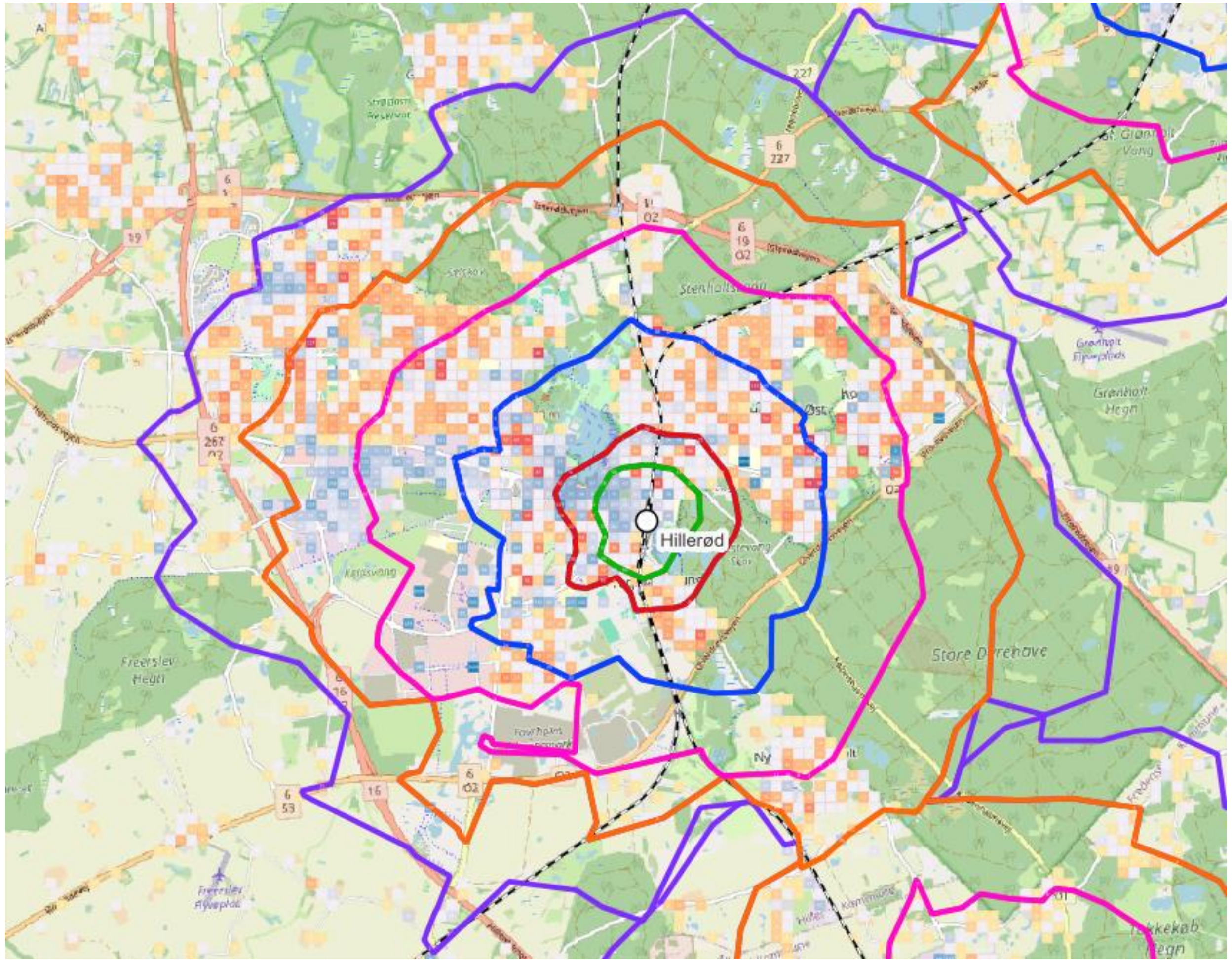
Each ring is 1km of travel distance (via road/sidewalk/etc.)

Job density is marked by blue squares

Residential density is marked by orange squares

The darker the more jobs/residents

-Danmark Statistik



The stations in the top 102 are quite spread across segments with the most in segment 3 and least in segment 4.

Segment	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5	Segment 6
Stationer	2 stationer	16 stationer	43 stationer	9 stationer	18 stationer	14 stationer

Segment 1

1. København H
2. Nørreport

Segment 2

3. Høje Tåstrup
4. Århus H
5. Fredericia
6. Hillerød
7. Ringsted
8. Slagelse
9. Vejle
10. Helsingør
11. Holbæk
12. Kolding
13. Frederikssund
14. Køge Nord
15. Horsens
16. Nyborg
17. Middelfart
18. Esbjerg

Segment 3

19. Østerport
20. Valby
21. Hellerup
22. Roskilde
23. Odense
24. Lyngby
25. Vesterport
26. Dybbølsbro
27. Nordhavn
28. Svanemøllen
29. Flintholm
30. Glostrup
31. Nørrebro
32. Vanløse
33. Ballerup
34. Carlsberg
35. Albertslund
36. Herlev
37. København Syd
38. Ryparken
39. Allerød
40. Sydhavn
41. Trekroner
42. Aalborg
43. Tåstrup
44. Friheden
45. Husum
46. Buddinge
47. Bispebjerg
48. Kokkedal
49. Bagsværd
50. Brøndbyøster
51. Hvidovre
52. Københavns Lufthavn
53. Malmparken
54. Måløv
55. Emdrup
56. Ølby
57. Skovlunde
58. Fuglebakken
59. Klampenborg
60. Randers
61. Ørestad

Segment 4

62. Næstved
63. Holte
64. Værløse
65. Nivå
66. Ølstykke
67. Sorø
68. Haslev
69. Skanderborg
70. Herning

Segment 5

71. Ishøj
72. Køge
73. Birkerød
74. Sjælør
75. Hundige
76. Rødovre
77. Greve
78. Brøndby Strand
79. Charlottenlund
80. Farum
81. Avedøre
82. Solrød Strand
83. Vallensbæk
84. Ordrup
85. Humlebæk
86. Stenløse
87. Virum
88. Espergærde

Segment 6

89. Karlslunde
90. Nykøbing F
91. Vordingborg
92. Hedehusene
93. Tølløse
94. Korsør
95. Snekkersten
96. Hobro
97. Kalundborg
98. Vejen
99. Bramming
100. Holstebro
101. Sønderborg
102. Langå

Kilder: Projektteam analyse

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