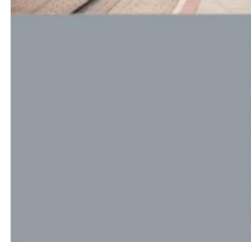
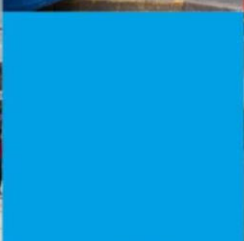
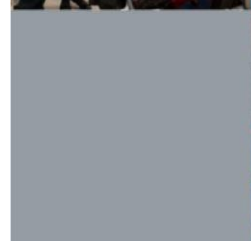
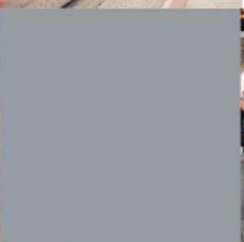
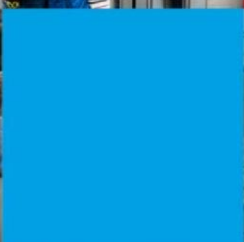
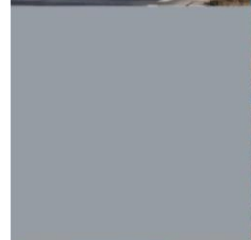
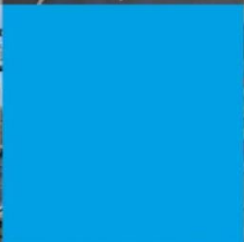


East Midlands rail franchise: passengers' experiences and aspirations

September 2017



Introduction

Passengers are now the majority funders of the day-to-day railway and should be at the heart of all decisions. This includes new franchise deals.

We believe that passengers' views should be understood before new services are specified, and their interests placed at the heart of the contract. That's why we carried out bespoke research into the passenger perspective, to supplement the data we already have from existing research.

The current East Midlands franchise ends in March 2019 and is operated by Stagecoach under the East Midlands Trains brand. The Government intends to make a further interim agreement with the current operator, ending in August 2019. The Department for Transport (DfT) is running a competition to find an operator for the next franchise from this date. As part of the consultation process, the DfT asked Transport Focus to carry out research to understand passengers' current experiences and explore their needs and aspirations for future East Midlands Trains services.

We carried out focus group research in May 2017, which revealed that passengers appreciate a franchise that is largely delivering on their basic needs. They find East Midlands Trains' services to be generally punctual and reliable, with local journeys offering decent value for money. But they consider the trains themselves to be dated and below the quality standard they see elsewhere on many of the franchises that connect with East Midlands Trains network. For longer journeys, especially to and from London, opinions of the value for money are much more varied, with some people finding good value fares whilst others find tickets to be eye-wateringly expensive.

Passengers' experiences of travelling on other train and bus operators' services help shape their opinions and expectations. The cleanliness of the train is an area of concern for East Midlands Trains passengers, and they increasingly see amenities such as plug sockets and free Wi-Fi as lacking, whereas many other operators provide them as standard.

In general, passengers praise staff at stations and on trains, finding them friendly and helpful. Where passengers have problems, these are generally resolved proactively on-the-spot, or dealt with successfully by East Midlands Trains' customer relations team.

Crowding is an issue on some services, especially at certain times and in particular places. This is compounded by short trains, which are often just one carriage on some routes. Sometimes these issues are a daily occurrence, for example at peak commuting times or Sunday afternoons, whereas other instances of crowding can be linked to special events. Passengers would like the new operator to provide sufficient seats, and be better prepared in planning extra capacity for things like football matches in Derby or race days at Uttoxeter.

Passengers have some affinity, even affection, for the name and brand. They regard it as 'local' and part of their community, with people noting similarities with local buses. They choose to travel by train because it's convenient and easy, calculating that it's quicker, more reliable and often cheaper than taking the car or the bus. A pleasant journey experience on the daily commute means that passengers then also choose to use the train for leisure journeys at other times.

Passengers' priorities for the next franchise

Overall, East Midlands Trains is delivering the basics well, providing a solid foundation on which the new franchise can build. Passengers will expect to see this continuing, alongside providing more quality-focussed elements of the journey experience such as power sockets and free Wi-Fi. But this franchise is an opportunity to deliver well beyond passengers' expectations. We would like to see the new operator embrace this challenge and become a market-leader in providing an outstanding whole-journey experience.

Our research clearly shows that delivering a punctual, reliable service is rail passengers' fundamental requirement of the operator, but it also identifies other key areas for improvement in the next East Midlands franchise:

- capacity, crowding and service frequency
- replacing rolling stock and improving stations
- on-board experience
- ticketing, retail and value for money.

We will now work with the DfT to highlight these, and other issues, seeking a franchise specification that reflects passenger needs, exceeds their expectations and provides a framework for prospective bidders to propose ambitious and high-quality proposals.

Key findings

The following sections summarise the key findings we identified. We reference Spring 2017 National Rail Passenger Survey (NRPS)¹ results and other research for context where appropriate.

Getting the basics right: punctuality and reliability

Punctuality, reliability and how disruption is dealt with are highly important across all passenger types, but particularly for commuters. In general, our focus group research shows that, right across the East Midlands Trains network, passengers enjoy a service they can depend on to get them to where they need to be, on time.

However, there are a few places on the network where delays do occur more regularly, often as a result of infrastructure issues. For example, participants in our research identified signal failures in Sleaford, Lincolnshire as a frequent cause. The new operator should work closely with Network Rail to ensure that these isolated issues are addressed.

Punctuality and reliability is of critical importance to passengers, commuters in particular. Our research, *Train punctuality: the passenger perspective*², demonstrates a clear link between punctuality and overall satisfaction. For every minute of lateness, satisfaction declines by one and a half percentage points across all passenger journey types, rising to three percentage points for commuters.

The NRPS shows that 88 per cent of East Midlands Trains passengers are satisfied with the punctuality/reliability of their service, compared with an average of 86 per cent for long distance operators.

Concerns with performance are felt more acutely by commuters than leisure or business travellers. Many leisure and business users find delays less frequent in offpeak hours and these also tend not to be coupled with overcrowding. In addition, leisure passengers often feel less time sensitive so are not so frustrated by minor delays. The NRPS shows that 78 per cent of East Midlands Trains commuters are satisfied with punctuality and reliability, compared with just 90 per cent of leisure and business travellers. This compares with a score of 68 per cent for commuters nationally.

Punctuality and reliability is crucially important, but how disruption is handled has a significant bearing on the level of trust passengers have in the operator. For East Midlands Trains there is room for improvement here: 52 per cent of delayed passengers think the disruption is handled well, compared to 58 per cent for long distance operators generally.

¹ *National Rail Passenger Survey*, <http://www.transportfocus.org.uk/research/national-passengersurvey-introduction>

² *Train punctuality: the passenger perspective*, November 2015

<http://www.transportfocus.org.uk/research/publications/train-punctuality-the-passenger-perspective>

Our 2017 research, *Rail passengers' priorities for improvements*³, found that having more trains arrive on time than happens now is the fourth highest improvement priority for East Midlands Trains passengers at about 1.3 times the average importance⁴. Nationally, the figure is about 1.8 times the average.

Although East Midlands Trains passengers are generally satisfied with the current levels of punctuality and reliability, there is still room for improvement. The new franchise should build on this solid base and strive for a significant increase in punctuality, based on right-time performance at all stations.

Replacing rolling stock and improving stations

Trains

East Midlands Trains passengers' single biggest area of concern, shown in our focus group research, is the age and quality of the trains themselves. Whilst appreciating the punctual, reliable service, the dated appearance of the trains and the design of their interiors leads to people describing the operators' brand overall as "basic", even rather "shabby". They notice a stark contrast between East Midlands Trains and more modern trains run by Virgin Trains and London Midland, which share some stations on the network.

This sentiment applies right across the network, even on the London route, although it is far more pronounced on local routes. Trains are described as noisy and "rickety", compounded by the jointed track on some more rural parts of the network, producing a rather rough ride compared to the main line.

Passengers notice small differences between the different types of rolling stock. For local journeys, 'white trains' are seen as smarter, quieter and more comfortable than 'blue trains'. However, passengers notice there are fewer of 'white trains' running on the network. Some commuters specifically take an alternative train to the one they might otherwise choose, given the knowledge that it will be a 'white train'.

For some passengers, especially those with mobility difficulties, the type of train affects how easy it is to get on and off. The single-carriage variety is cited in the research as presenting particular difficulties, due to its narrow doors and small, additional step between the train and the platform.

It is worth noting, though, that passengers are familiar with the dated nature of the trains, and it is what they have come to expect. Whilst they highlight these issues in

³ *Rail passengers' priorities for improvement*. Full report not yet published. Our 2014 report is available here: <http://www.transportfocus.org.uk/research-publications/publications/rail-passengers-prioritiesfor-improvements-october-2014>

⁴ We ask passengers about the level of priority they place on improving 31 factors, and assign an index of priority level averaged on 100. An index of 300 is three times as important as the average and an index score of 50 is half as important as the average. 'More trains arrive on time than happens now' has an index of 133 for East Midlands Trains.

our focus group research, they regard them as a lower priority than providing a punctual and reliable service.

As such, the NRPS reveals an overall satisfaction score with the train of 86 per cent, falling to 84 per cent for East Midlands Trains local routes. For long distance operators, on average, it is 87 per cent. Satisfaction with the upkeep and repair of the train is 81 per cent overall for East Midlands Trains, against a long distance operator average of 85 per cent. It's rather lower for East Midlands Trains' local routes, at 75 per cent, but rises to 88 per cent for the Liverpool-Norwich route (usually operated by the aforementioned white trains).

The new franchise should look to significantly improve the quality of the trains themselves, bringing them up to 21st century standards. Introducing trains across the network with an improved level of comfort and better provision of facilities, especially on local routes, would go some way to transforming passengers' overall impression of the franchise.

Stations

Our focus group research shows that passengers' experience of stations across the East Midlands Trains network is a mixed bag.

Of the larger stations, Nottingham station is highly regarded by most passengers, following its improvement works. Passengers consider the station well-connected, smart and having good facilities. On the other hand, Leicester station is felt to need some attention with people wanting better access, integration with local buses, parking and station facilities.

Sheffield passengers would like a station that better represents the grandeur of their city in terms of design, citing St Pancras as an example. At a more practical level, it can become overcrowded and cramped at peak times.

There are many small, unstaffed stations across the network. These can vary significantly in quality. Some stations have been adopted by local groups, who make a feature of their picturesque, historic nature. Others feel completely run down, with passengers actively avoiding using them over concerns about personal security, or even being unaware that trains still stop there. These need more signage, better lighting, CCTV, as well as investment programmes to rejuvenate the stations and their immediate surroundings.

Passengers' basic needs at stations are to feel safe and secure, to have sufficient seating with shelter from the elements and to have access to accurate, live information. They also value the provision of toilet facilities, though they accept that this isn't always realistic at the smallest stations. Satisfaction among East Midlands Trains passengers with personal security at the station is 82 per cent, seating is 64 per cent and shelter is 79 per cent. The provision of information about train times and platforms is scored at 92 per cent. Satisfaction with toilet facilities at the station is at 61 per cent. These are all on a par with other similar operators.

Several stations on the network still use a level crossing to get from one side of the station to the other. As well as the safety implications, this can be stressful for passengers if the barriers are down, preventing them from getting to the platform to catch their train in time.

The NRPS shows that 89 per cent of East Midlands Trains passengers are satisfied with the station overall, against 88 per cent of passengers using long distance services on average. It's a little lower for regional services (84 per cent), but higher for London services (90 per cent) and Liverpool – Norwich services (93 per cent).

For the most part, where staff are present passengers find them friendly, helpful and valuable. 75 per cent of East Midlands Trains passengers are satisfied with the availability of staff, 84 per cent with the attitudes and helpfulness of station staff and 91 per cent with the way requests to station staff were handled. These are similar to other long distance operators.

At a minimum, the new franchise should ensure that all stations, and their immediate surroundings, feel safe and secure. They should have good lighting, CCTV, real-time information and the ability to speak to a member of staff. They should be clean and in a good state of repair. Passengers also expect sufficient seating and shelter. Where additional facilities are present, such as toilets and waiting rooms, the operator should ensure that these are available for passengers to use when trains are running. We ask that the new franchise builds on this and creates an inviting environment at stations, to enhance passengers' experience as they enter and leave the rail network.

Capacity, crowding and service frequency

Crowding

For the most part, our focus group research shows East Midlands Trains passengers don't suffer the same chronic overcrowding seen by commuters on other operators.

But there are still certain places and times where crowding is a significant issue, and getting a seat remains the other standout priority for improvement for East Midlands Trains passengers, behind value for money. It is a widespread issue for commuters on the London services. Crowding on commuter services to and from Lincoln is perceived to be caused by an insufficient frequency of service, and with often only one carriage on each train.

In 2016 we carried out research into how passengers feel during their journey⁵. This showed that crowding is a significant contributing factor to negative emotions, second only to delays. Within that, we see passengers become increasingly angry and frustrated when they are unable to do what they want, for example, to use their smartphones because of overcrowding.

⁵ *How rail passengers really feel*, June 2016
<http://www.transportfocus.org.uk/researchpublications/publications/rail-passengers-really-feel>

Passengers recognise a wider concern for East Midlands Trains in its ability to plan for, and provide additional capacity, when services are likely to be particularly busy.

Examples include football match days, Christmas markets and race days at Uttoxeter.

Families from across the East Midlands enjoy summer trips to Skegness. This puts a particular strain on capacity across Lincolnshire, on roads as well as on trains. Passengers report uncomfortable journeys for significant lengths of time, creating a particularly negative impression, including among children for whom it might be their first time using a train. Local commuters also get a raw deal in these periods, as roads are chock-a-block and trains crowded, making getting to and from work challenging.

The NRPS shows that 76 per cent of East Midlands Trains passengers are satisfied with the level of crowding on their service overall, including 74 per cent of London passengers and 76 per cent of passengers using the Liverpool – Norwich route. Local passengers are a little more satisfied with the level of crowding, at 81 per cent.

Some passengers also have concerns with the amount of luggage space on busy services. Just 57 per cent of passengers using the Liverpool – Norwich service are satisfied with the space for luggage on the train and 59 per cent for London services. Passengers find that local services tend to have a little more luggage space; 71 per cent of passengers are satisfied.

Frequency

Some passengers have concerns over the frequency of their service, at least at certain times. Most routes offer at least an hourly service throughout the day on weekdays and Saturdays, but on Sundays services are heavily reduced, with some routes seeing just a handful of trains and none before midday.

For commuters on local services, the frequency of service at peak times is sometimes seen as inadequate. They often have to travel earlier than is ideal, in order to avoid being late for work. This issue is felt particularly acutely by those commuting to Lincoln, where there is no train arriving from Leicester and Nottingham between 8am and 9am. For some, this rules out the train altogether as an option for commuting, and so they choose to drive instead.

Passengers would like to see more late night services across the network. Many would like to use the train to go out in the evening, but this is not currently possible with current services ending as early 9pm in some places. The demand for later services includes trains back to the East Midlands from London, which people feel finish earlier than on other comparable routes.

Some weekend commuters cannot use the train to get to and from work where services don't run early enough in the morning or sufficiently late at night.

The NRPS shows big gaps in satisfaction with frequency when comparing the London route, at 87 per cent, Liverpool – Norwich at 80 per cent and local routes down at 68 per cent. Long distance operators overall score 86 per cent for passenger satisfaction with frequency.

Passengers express concern over the reduced frequencies and longer journey times on Sundays. Looking at satisfaction scores on the London route, 96 per cent of passengers are satisfied with the journey time on Saturdays, compared with 78 per cent on Sundays. With frequency, 93 per cent are satisfied on Saturdays but just 74 per cent on Sundays.

The new franchise should offer a true seven-day a week service. It needs to reflect passenger demands throughout the week: those travelling for work and leisure purposes, including Sundays. It should ensure that services are offered at the most suitable times, with sufficient capacity, for people to get to and from work. Demand for leisure travel later in the evening should also be considered, with the potential for later services from London and out of the main cities across the region. The new franchise should also look at how to best adapt to, and provide additional capacity for, peaks in demand for special events.

On-board experience

The passenger experience on-board the train is one area where the operator of the new franchise can really make a difference. Passengers find the current offering rather basic and functional right across the network, including on London services, where they make comparisons with other operators' offerings.

Passengers are pragmatic, and the specific outcomes of our research focus on a few, tangible changes, which would bring the service quality in line with their expectations. But given that this is a franchise that is, for the most part, delivering on passengers' core requirements, herein lies an opportunity to really do something innovative. Bidders should consider how they can provide a quality of service and hospitality that really exceeds expectations.

At the most basic level, the cleanliness of the train and the state of the toilets is an area that currently falls behind. Satisfaction with the cleanliness of the inside of the train is 74 per cent on local routes, compared with 86 per cent on London services and 85 per cent for long distance services in general. It's also the biggest driver of satisfaction on East Midlands Trains' local routes. Satisfaction with toilet facilities on the train ranges from 50 per cent on local routes to 55 per cent on London services.

But passengers today expect more. Many benefit from free Wi-Fi and plug sockets on local bus services and train services elsewhere, and would like to see the same on their local trains. These things aren't seen as 'added extras', but are what is required to bring the service up-to-date. Free Wi-Fi on the train is the third-highest priority for improvement for East Midlands Trains passengers, behind value for money and getting a seat. It comes ahead of several factors related to punctuality and frequency.

London services are generally seen as being smarter, cleaner and with more up-to-date facilities, although even these services are thought to be a step behind comparable services on other routes, such as on Virgin Trains East Coast. Passengers would like the catering offer to be improved beyond what they currently see as a rather basic refreshments trolley. First Class passengers would like to see their offer brought in line with other long distance operators.

In our focus groups, a few participants remembered (unprompted) the complimentary tea and coffee offered to all passengers on London services by the previous operator, Midland Mainline. The fact that they still have a positive impression of the brand, ten years since its demise, shows that small things can make a big difference.

In terms of what might be 'nice to have', some commuters on local services would also value some basic refreshment facility on-board, such as a vending machine for hot drinks.

Passengers value having customer-facing staff on-board for information, assistance and safety, but they would like them to be more visible. In general, they find them friendly and helpful. The NRPS backs up the need for staff to be more visible, especially on the Liverpool – Norwich route. Satisfaction with the availability of staff is 77 per cent on local routes, 67 per cent on London services and just 58 per cent on Liverpool – Norwich trains. The long distance average is 69 per cent. In terms of the satisfaction with the helpfulness and attitude of staff, the East Midlands Trains average is 81 per cent, rising to 85 per cent on local routes.

Personal security on board

Most passengers feel secure most of the time when on-board EMT trains. However, there are some situations where they have some concerns about anti-social behaviour, such as where trains are busy following sporting events, and where people have been drinking alcohol. Passengers are especially concerned in these circumstances if they are travelling with young children or there are no staff available.

Passengers are very aware that there is 'no escape' from these situations when on the train. They feel that staff are not visible and helpful enough in anti-social incidents, and are not confident that staff are properly trained to deal with such scenarios. Many passengers are unaware of on-board CCTV being present. Those who are aware have little confidence that the cameras are being monitored. As such, they do not see it as a deterrent to anti-social behaviour.

Satisfaction with personal security on the train is 82 per cent for East Midlands Trains passengers overall, against 84 per cent for long distance operators generally. It's a little lower on local services, at 78 per cent, and is the second biggest driver of dissatisfaction on East Midlands Trains services overall, contributing to 26 per cent of dissatisfaction overall, behind how the company dealt with delays at 36 per cent.

The new franchise should look to ensure that all passengers feel safe and secure on board, and that their requirements for cleanliness, comfort and convenience are met.

Ticketing, retail and value for money

Value for money

Across the country, the cost of rail travel is a big concern for many passengers. While they are resigned to believing that prices won't come down, they want to see the amount of money they pay reflected in the quality of service they receive.

East Midlands Trains passengers vary in their perceptions of value for money across the different routes. Commuters are especially conscious of how the cost of their ticket compares with driving or taking the bus. For local services, they often conclude that the train offers reasonable value for money, working out cheaper than other options or offering a faster, easier journey.

Some passengers benefit from and value using railcards, but in general there is confusion and a lack of awareness of the different types of railcards available, and their rules. Passengers would like to see better value family fares.

Many passengers who use the train for local journeys in the East Midlands also travel further afield from time to time, including using the East Midlands Trains route to London. Here, there is a far more mixed opinion of the value for money of ticket prices. Whilst many people recognise that there are sometimes 'bargains to be had', at other times tickets can be eye-wateringly expensive. These differences in price are seen as extreme and arbitrary.

The NRPS shows that satisfaction with value for money is 66 per cent for local services, 58 per cent for Liverpool – Norwich and just 42 per cent for London services. It's 58 per cent for long distance operators generally.

Retail

As with most operators, the means of buying a ticket depends on a range of factors including journey purpose. Commuters tend to catch one specific train every day, and buy a daily, weekly or monthly ticket at the station, from a ticket machine or a member of staff. Leisure passengers deploy a high degree of planning for longer trips. Our research shows that, for longer journeys, many East Midlands Trains passengers use the company's own website to buy tickets. Like the train service itself, they find the functionality to be good but that the design is a little old-fashioned. They tend to be comparatively savvy towards money saving methods that require extensive planning.

Some passengers prefer to use ticket offices, especially infrequent leisure travellers who are older and/or from rural areas, or passengers wanting specific products that they can't get on the web or from a ticket machine, such as season tickets or group tickets.

There is a significant amount of interest in a 'smarter' alternative to current paper ticketing. This chimes with other research we have carried out that indicates that passengers find the ticket purchasing experience complex and uncertain⁶. Across all groups of passengers, there is a desire to make the ticketing process smoother, easier and more convenient. People want to see innovation that will deliver improvements to each stage of the process: purchasing a ticket, ticket types (such as smart and e-tickets) and in providing relevant journey updates after the purchase has been made.

Satisfaction with ticket buying facilities is relatively high overall, at 85 per cent, just below the average for long distance operators of 87 per cent. It's pretty consistent across the network with 84 per cent of passengers on the London route satisfied, 85 per cent of local passengers and 88 per cent of passengers on the Liverpool – Norwich route.

Ticketing issues

Passengers are supposed to buy a ticket before they board at stations where retail facilities exist. However, this sometimes presents problems. Ticket machines don't sell all products, so for example if a passenger requires a season ticket they have to first travel to a ticket office. At some stations on the network, there is a single ticket office on one side of the station – accessible only via a level crossing. Our research shows that passengers in these situations are concerned about the barriers coming down whilst they are buying their ticket, causing them to miss their train. The research also shows that ticket vending machines are frequently 'out of order' at some stations.

In some places, there is confusion surrounding what 'the rules' are regarding boarding the train without having bought a ticket. Our research shows a complete mix of understanding: some passengers think that it's fine to buy a ticket on-board from the conductor, some are unsure but buy a ticket in advance anyway, some think they are unable to buy a ticket on-board.

Some passengers try to avoid buying a ticket in the hope they won't be charged. For example, passengers using the Liverpool-Norwich line report not having to pay between Dronfield and Chesterfield due to lack of ticket inspectors.

Many passengers are unsure whether they will be punished or penalised by officials if they do not already have a ticket when they board. This situation is often the case for those law-abiding travellers who come from rural stations without a ticket machine or ticket office. In addition, revenue protection officers can be seen as intimidating, wearing 'big stab-proof vests', adding to passengers' anxiety. Passengers don't recognise the revenue protection officers as East Midland Trains staff, viewing them as government officials, part of the British Transport Police or some other unknown body.

⁶ Our smart-ticketing research, <http://www.transportfocus.org.uk/research/smarter-travel>

The new franchisee should be clear and transparent in its policies, with appropriate facilities and signage at stations. There should be reasonable and fair processes in place to ensure that passengers travel with a valid ticket, and don't get penalised for making a mistake, or for a system failure such as a broken ticket vending machine.

What happens next?

Our aim is to ensure that passenger interests are placed at the heart of the next East Midlands franchise. The findings from this research provide a useful insight into passengers' current experiences and their aspirations for the future.

We will be drawing on this, alongside our wealth of other research, to inform further work on the franchise. This will include ongoing dialogue with the DfT as they develop the specification, a formal response to the Government's consultation and discussions with bidders as they shape their proposals.

The full research agency report of the qualitative research with East Midlands Trains passengers is available on our website.

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