

## Lakes Line disruption – June 2018

### Background

Passengers on the Lakes Line, between Oxenholme and Windermere in Cumbria, have faced significant disruption in 2018. This disruption began before the May timetable change, with an unprecedented number of trains cancelled in April and May. After the 20 May timetable change and widespread disruption across the Northern network, on 4 June Northern implemented an emergency timetable.

This timetable replaced all train services on the Lakes Line with buses, initially for two weeks, later extended to four weeks with an announcement on 7 June. Northern's stated aim for the bus replacement was to avoid further late notice cancellations and provide passengers with a more reliable service.

### West Coast Railways train service

On 18 June, after two weeks with only a rail replacement bus service, at short notice West Coast Railways (a heritage/charter train operator) began a train service following lobbying by local MP Tim Farron and local rail users. This train service ran alongside the rail replacement buses until Northern's train service resumed on 2 July.

### Objectives

Transport Focus wanted to understand the impact of all these changes. We took a 'passenger-eye view', using observations and informal interviews on 21 and 22 June to provide a qualitative snapshot of the passenger experience on the line.

### Conclusions

- Northern's rail replacement bus operation was generally efficient and effective, keeping passengers moving, supported by friendly and helpful staff.
- The West Coast Railways train service was very well received, with the heritage character and sense of occasion felt to be in keeping with the area.
- The late notice addition of the West Coast Railways service meant access to platforms on previously closed stations was required. It also changed passengers' information needs, requiring explanation of the options available. During fieldwork dates the information about the train services was limited making passengers more reliant on staff for information and support.
- Local passengers were very concerned about the disruption and impact on the community and tourism. Northern will need to work hard to rebuild trust.



# Lakes Line disruption to services

June 2018

# Background and objectives

The 'Lakes Line' Northern service has been temporarily replaced with rail replacement buses



On 18 June a heritage operator began at short notice to run a rail service following lobbying by the local MP and user groups



Transport Focus and Transport for the North want to understand the **impact** of the changes on the Lakes Line to passengers



- Awarded the franchise to run the 'Lakes Line' from Oxenholme to Windermere in 2016
- In 2018 there have been significant disruptions to service, including numerous cancellations
- On the Lakes line, in June 2018 the rail service was removed and replaced with a temporary bus service
- The stated aim is that the train service will be reinstated in July 2018

## The Lakes Line in the news



- An online survey was distributed, however, there was not a high response rate
- Qualitative research and observations were therefore undertaken on the 21 (a strike day on Northern) and 22 June 2018 amongst passengers using the train service and the bus service. This was also supplemented with conversations with staff and local people not using the line.
- Results from this are summarised in this report

# How the research was conducted

Researcher visited Lakes Line for 2 days (21 June, 22 June) and conducted observations, intercept interviews as well as travelling on the options available



Observations of passengers and staff at stations and in areas designated for the rail replacement bus services



Informal intercept interviews amongst passengers and staff at stations, on rail/ bus services. These were at different stages of the journey process, so ranged from someone traversing the station to board a service, to someone not travelling on the day but looking for information for another day, to someone making a journey



6 bus journeys (both the whole line and shorter parts)  
5 train journeys (both the whole line and shorter parts)

Oxenholme ● Kendal ● Burneside ● Staveley ● Windermere

All stations and bus areas visited



21 June 12.30pm to 7.30pm  
22 June 7.30am to 3.20pm

# Range of opinions included

Researcher talked to a range of travellers and staff at all destinations...



Younger people

Overseas  
visitors

Commuters

English  
as an  
additional  
language

Local  
people

Station  
staff

Students

Tourists

UK  
visitors

Business  
travellers

Rail enthusiasts

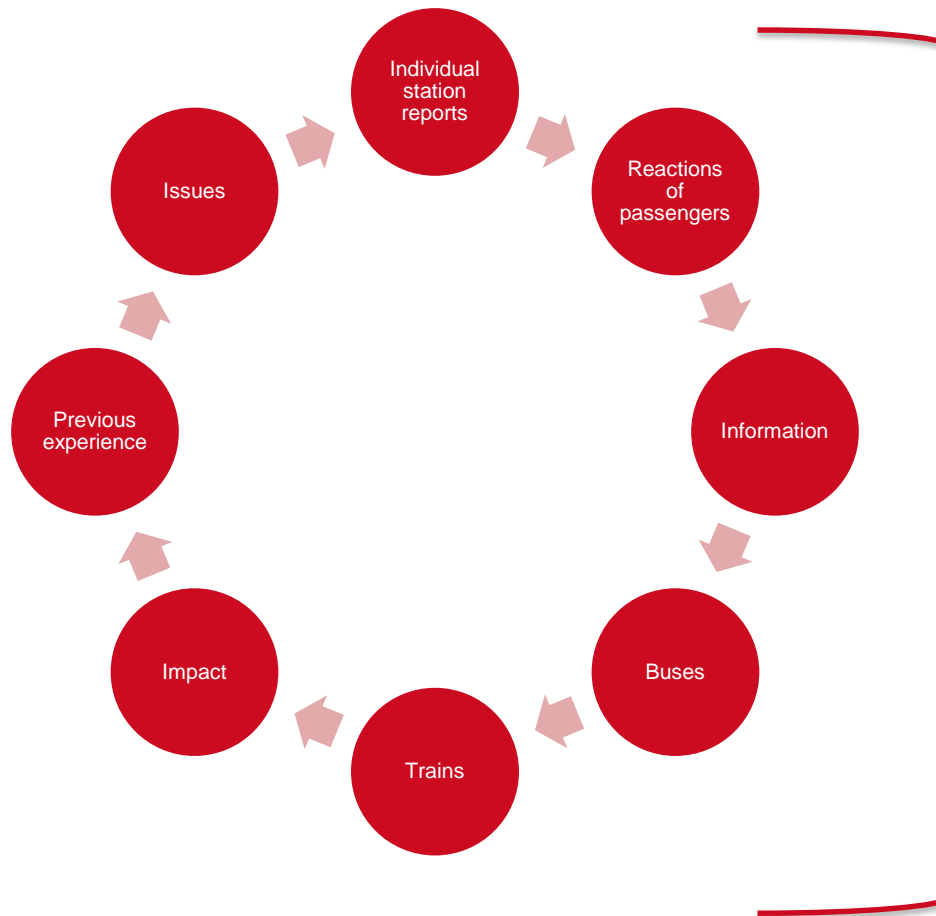
Older people

Rail  
replacement  
bus staff

West Coast Rail  
staff

Local  
journeys

# What is in this report?



## Key questions to answer

- What is it like 'on the ground'
- Are there any learnings/ improvements for this line/ other lines?
- What is the impact of the changes on passengers

# Context

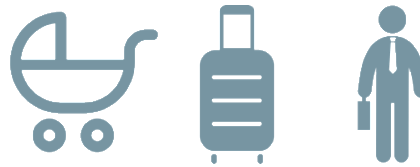
Passengers come from all directions, with all kinds of luggage and with all sorts of knowledge and understanding

## Visitors



- Travelling from other countries, cities, and other parts of the Lake District via train
- Not all visitors to the area come via Oxenholme, they might travel to Windermere and then holiday and then depart to Oxenholme
- Some may be walking and arrive at stations on the line such as Staveley or Kendal

## Locals



- Commuting to/ from work
- Business travel – often going to Oxenholme for onward connections
- Holiday homes
- Days out/ walking (not just visitors that do tourism)
- Visiting friends and family

## Awareness of changes to services

- Not aware
- Seen on news
- Local discussion
- Checked on National Rail
- Saw at station
- Email
- From Airbnb host

NB: passengers may have awareness of disruption to services but not specifically that all services are cancelled on Lakes Line

Some had issues on the way to Oxenholme with delays or being told to change trains at Preston unnecessarily

# Oxenholme: on the ground

Oxenholme Station is managed by Virgin Trains

A very straightforward process for most people, especially if they arrive when the train service is soon to depart – when it works, it works well

Incoming train **may announce** available options (bus/ train) and times for continuing journey

Announcements are made on the **platform** about the next bus/ train departures

Trains and bus departures are listed on the **information screens** and **platform displays** (station staff said they had to do this manually). Nothing in ticket office.

Although on the second day the trains were not listed at the start (West Coast Rail staff said they had to call Manchester and had a 'moan')

There are **staff available** on the platforms and touchpoints with them are always positive

Rail replacement buses leave from the short stay carpark. There is signage in the station to indicate its location, but it's subtle and not present on platform (**see section on information**)

Area to wait for bus is well provisioned (including decorations and water) and was observed to be well organised. Staff are helpful and pleasant. They give advice about what service to take including the train if they think that this is a better option for the passenger (although this is **them** making the judgement).

*Its not the normal train but its going to Windermere and that's all I care about*



Whilst Oxenholme is the most organised transition, things can go wrong if staff are not available



# Oxenholme

Oxenholme Station is managed by Virgin Trains

Buses and trains were on electronic displays. Rail replacement bus area comfortable and clean

Platform information at Oxenholme



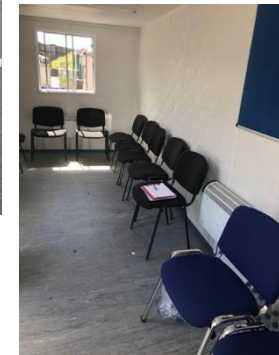
Displays not showing trains on the second day at all times



Rail replacement bus waiting area at Oxenholme



Area set up in short stay car park for rail replacement services



# Kendal: on the ground

Kendal station is managed by Northern

Unmanned station with little information available at platform level.  
Relying on rail replacement staff outside station to direct passengers

At the station itself (a short walk up a steep hill from the road) there is **very little visible information** as to how passengers should make their journey. Information about the bus available by the entrance to the station

A **member of the rail replacement staff** should be present at all times at the stop next to the station. They stop people who are walking up to the station and periodically check there is no one there waiting

The **staff member** has a bus timetable however, there is limited information at the bus stop itself otherwise

There is **no information about the train service** at the station except for the electronic display and this does not give information about all services, only the one next to arrive

Buses leave from the road nearest the station on the **opposite side to the station entrance**

It is **not particularly obvious or easy to see the bus stop** – it doesn't stand out and there isn't much seating

Unlike Oxenholme and Windermere no translated information available (that I could see)



There was **no way of purchasing tickets** as the machine was newly installed and not yet working

Its not just tourists – locals were also arriving and some were confused

# Kendal

Kendal station is managed by Northern

Images show the dearth of information at platform level or about the train

## On the station



## Just outside the station



Rail replacement area

Bus information



# Burneside and Staveley

Both are managed by Northern

## Unmanned stations with some information about the bus, but little about the train

At both station entrances there is signage, some quite subtle, about the change to services with regards rail replacement buses

These are **unmanned** stations therefore there is a risk people could wait on platforms for some time unaware of the bus

The rail replacement bus stop at Staveley is some distance from the station itself. To get there you need to follow a 'trail' and it is not always very clear where your next 'sign' will be

There is **is timetabling information** at the rail replacement stop. When I used these stations, the services were running to time

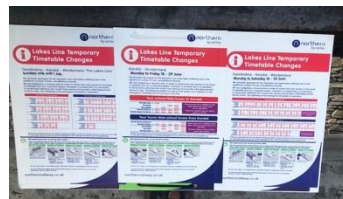


# Burneside and Staveley

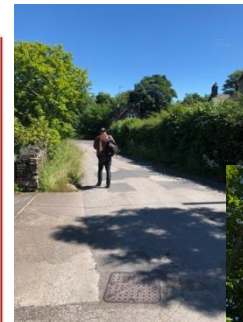
Both are managed by Northern

At Staveley there was quite a walk required to find the pick up point in the village centre

Staveley



Burneside



# Windermere: on the ground

Managed by  
Northern

Busy station, and at times slightly muddled. Lots of rail replacement staff. Information available but limited for trains.

As you arrive at the station you are greeted by, as many as, at times 6 staff with high vis.

There are also 'A' signs outside the station entrance and posters about the rail replacement service. One of these was translated. It would be difficult to miss that something was going on.

There was a sign with the train times listed outside a shop which is next to the station – Booths but not in station or next to station itself

1 member of staff in the ticket office when asked claimed to be unaware of the times of the trains because they were 'not Northern services'

'High viz' team are contractors employed for rail replacement guidance however there is a member of Northern staff and they do check tickets

The area to get the buses from is not delineated and there is very little seating. There are also scheduled bus services running from the area as well as access to other vehicles such as taxis. This means that coaches can only pick up just before they leave and that it is therefore less easy to guide people in the right direction. Bottled water is available (as it is at Oxenholme and Kendal).

I observed staff advising about trains, e.g. *'and you can take the fancy train if you like it will leave at 3.30pm'* however, they were not announced in the same way as in Oxenholme.

There is almost too many staff in the front of the station, its not particularly clear who is doing what and why. But they are pleasant and try to be helpful

The lack of a departure board hampers information flow and makes everything reliant on staff

# Windermere

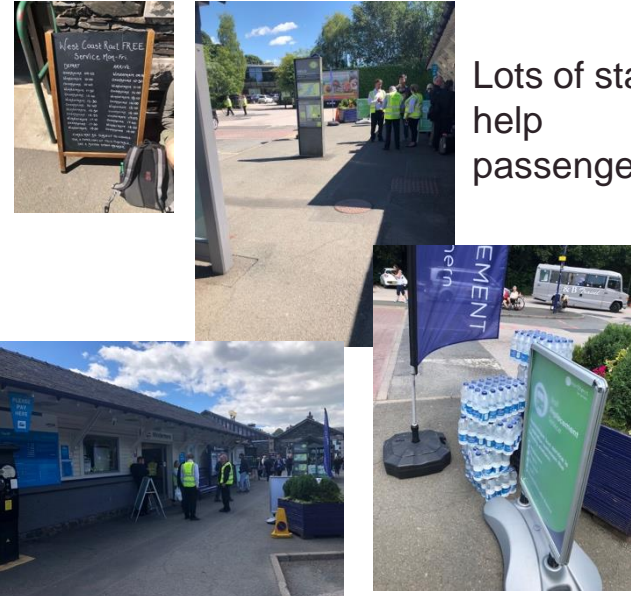
Windermere station is managed by Northern

A busy and more difficult area to manage than at Oxenholme.  
Information sharing could be more effective

## On the station



## Information sharing



# Information is often through staff

High reliance on staff, particularly at stations other than Oxenholme.  
Printed information at Oxenholme lacks stand out on platform

On the platform at all the stations there was not a great deal of signage. This could lead to confusion. A clear sign indicating that services are disrupted and what to do **next** would ease this

Clearer signs directing passengers to rail replacement bus service would be useful at Oxenholme – at the moment it relies on asking staff or leaving the platform where there are more directions

Colour and logo is subtle and could be missed. Especially where there is a 'trail' to follow as is the case at some stations. In the case of Staveley the trail is long!

The rail service needs a printed timetable at the stations. People are going there to check the times and they are not able to do so. It would also help situations when the information boards are not working

Having rail information available at Windermere would ease confusion in what is an already very busy area

More easily available printed information would help people who want to make their own decisions rather than rely on advice from the bus replacement staff

There is translated information available but not everywhere

Not everyone is aware of the changes in advance of making the journey, even those who purchased their tickets online – a missed opportunity

- System relies on staff to give the right information and to be available
- Issues can arise if staff aren't available or as present (like in Kendal, Staveley and Burneside)
- Not everyone likes talking to staff or having to adapt on the day (ie people with anxiety/ ASD)

*It's confusing for tourists. Locals are getting used to it now. Good info is not easy to get*





# Buses experience often good

Buses were clean, often relatively punctual and frequent. No significant evidence of detriment with using the service

Many buses observed to be very quiet or empty. One driver said he had never had a passenger on the last stopping service from Windermere. However frequent users say they can be busy at times but **not as busy as the regular scheduled train service.**

There seems to be **excess capacity and flexibility.** The controller at Windermere uses National Rail to try and match demand

Although the posters do stipulate that there should be no bikes or items that do not fold, or animals, Oxenholme staff suggested they would **accommodate anything they could.** Bus passenger was observed carrying a dog

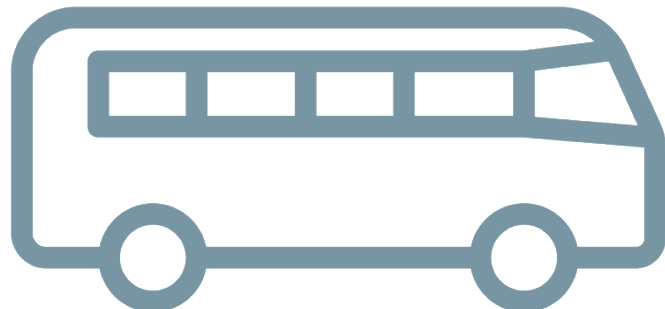
Buses were **not always strictly on schedule** or expected by staff but there is a steady stream

*They are friendly, professional, doing what they can*

*Brilliant service. Better than what was there previously – more reliable and more frequent*



One passenger was put on the **wrong bus** at Windermere so the bus driver had to make an unscheduled stop. When I asked regular passengers about this however, they said this was unusual and that they had not noted this occurring.



Passengers were **mostly calm** boarding and leaving the services. One lady was slightly agitated because she had been told that the bus was going to Staveley station when it does not actually stop there but some way outside. She had a long walk and a big bag

The general issue with the buses which applies to rail replacement services in general is that there is more **UNCERTAINTY**... see next slide

# Attitudes towards the buses

Most are not enthusiastic about them but good experiences exist



or



General feeling of **unreliability** but this does seem to fade with those who regularly use and who find the service to have been as / more reliable than the previous rail service

**Uncertainty** – of how long it will take, what time it will get there, where it will go from, how to find out information is a common niggle. It is not that people think it's impossible to navigate, rather it's an added complication they would rather avoid if possible

**Time taken** – feeling that journey will take longer and that there is less guarantee about the time it will take due to traffic and other potential delays. Locals in particular have this concern

**Comfort** – travel sickness, space, ability to move around are issues. Comfort thought to be compromised on a bus rather than train

**These concerns will be a barrier to use for some – particularly if they have had a bad previous experience and/ or have a choice in the matter (i.e. a car)**

**For most however, these do not translate into a feeling of outright negativity however they may still prefer to wait longer for the train to avoid the bus**

**Some locals refuse to use the bus services or are very angry about their use on their line.**

**Good experiences** – pleasant staff, smooth transition, meeting a connecting service, getting there

*Its usually a dreaded word (RRB) but its gone very well.*



**Some people will take the bus if they think it will get them to their destination more quickly**

*NB: Perhaps due to the introduction of the rail services, however no buses were seen to be crowded/ difficult to board and it is these circumstances which can lead to passengers reporting previous detriment*

# Trains are well received

Heritage coaches and engine delight passengers.  
It also attracts people to visit so pleases locals



Lots of interest in the trains – photos being taken and rides and days out for locals and rail enthusiasts who have heard about the train

But... it's a bit ambiguous where it all fits. Bus staff might be feeling that they should not be suggesting the train....

Awareness of service existing, but lack of information can mean people are waiting for a train without knowing when it is coming/ potentially getting one going in the wrong direction

Service punctual, clean and mood on the train is jovial and celebratory. Trains are busy with lots of luggage and buggies/ prams, taking the pressure off the buses

Possible element of friction with some Northern staff and rail replacement staff (reports of them suggesting they were 'poaching passengers'. However, at all stations I observed trains being suggested to passengers at times

More easily available printed information would help people who want to make their own decisions rather than rely on advice from the bus replacement staff. Some may think its just the normal timetable and so need to be aware it is not

Service has the 'right feel' and is popular amongst many locals who are angry about the issues that have been happening with the service

*We saw lots of people taking photos at every station. It must be something special'*



*He said to me 'I probably shouldn't be telling you this but there is a train service to Oxenholme leaving in a few minutes'*



*I wasn't expecting it to be here to be honest!*



*I initially thought this new train service had replaced the bus*

# What happens to visitors

## They seem to muddle along and get to where they need to go

- Staff approach people who look lost and unsure – this is true for station staff and rail replacement staff
- They tend to say the name of their destination and get pointed in the direction they need to go in/ put on the right bus or train. They do not necessarily understand what is going on
- Staff might try to please tourists *'I said to him, do you want to get the Harry Potter train? I've got a bus, but there is a train...'*
- It can be confusing – they might not understand why they have to catch a bus or be worried that they don't have the right ticket to use the bus. However no one visibly distressed, although one German couple looked very annoyed and would not talk to me!
- Leisure travelers are often quite relaxed and so changes to their journeys do not phase them as they often factor in time and are more forgiving (in 'holiday mode') than if it was their regular train service. However, when there are crucial connections to be made, issues can be stressful

*I just rolled with it. I am from New York so its not a surprise*



*I was worried. Stressed about it initially when I heard about it. Travelling makes people anxious*



*[About bus] I am not worried, I have plenty of time. As long as it comes at 10.30. It's a free ride also*



*There was no one around [at Oxenholme]. We were told to go to the wrong side. Then at Windermere we were told the wrong bus times and nearly missed our connection*



# Who is running the train

Of those who are aware it is a different service, Tim Farron gets a lot of credit

Northern

Don't know/  
care

Tim Farron

Gets a lot of  
credit/ name  
checks

Heritage rail  
service/ West  
Coast  
Railway

Volunteers

DfT

Service is  
staffed very  
professionally

*Keep the old train and get rid of  
Northern!*



*I'd love to know who is funding it. I  
know its free but someone has got to  
pay for it*



# Reason for the changes

Strikes, engineering works and a shortage of drivers thought to be the reason for the change to the service. Locals are more likely to have a historical viewpoint

*They are all trying their best, somebody thought it was a good idea, but it didn't work out*



*Engineering works*



*It's to do with strike action which is a good thing. Why can't they just pay their drivers decently?*



*It's just generally confusing about Northern (member of staff at Oxenholme)*



*Timetabling issues – something to do with guards on the train*



*Problems recruiting drivers*



*There has been no drivers, no train, I have no idea what is going on*



*They told me when I bought the tickets. They said that the strike was the cause*



*It's a tricky line. Its had a lot of money spent on it but the last bit has been cancelled*



Not everyone understands why the disruptions are taking place or knows when they are scheduled to finish

*Drivers have to be trained on new routes – I am skeptical if that is true*



# Huge range in reactions

When the service(s) work well, there is **no detriment** and may not even be noticed as a change to scheduled service. However, if there is a hiccup then it can be a stressful experience for passengers

Not aware  
of  
difference

Passengers who use rail service but are either not aware that there was a rail replacement or who were but think that there has been a change and the regular service has been reinstated

Aware but no  
inconvenience

Passengers who use the rail service or who use the bus service but find it very smooth and have no issues with it. This may include locals.

Aware and  
some  
inconvenience

Passengers who use the bus service but have to negotiate this with bags or have some difficulty in finding where they need to go and what they need to do

Aware and  
frustrated

Passengers who have had a problem with using the rail replacement service or passengers who are frustrated about the issues that have meant it is in place

Avoiding  
using  
service

Locals who have other means of transport that have either found the service before the buses unreliable or do not wish to use the buses because they are perceived to be slow and unreliable

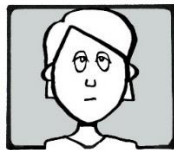
# Emotions of passengers

The train often makes people happy because it's easier and it's a special train. Reactions to bus sometimes better once used the service

## Rail replacement bus reactions....



Relaxed



Indifferent

More frequent experience



Happy



Frustrated

Less frequent experience



Worried



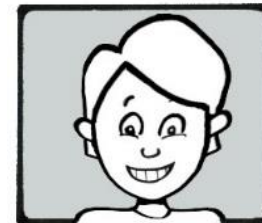
Stressed



Frustrated

**Initial** reaction for some

## Train



Happy

**Particularly if expecting bus**



# Impact on passengers

For some, the service changes have no impact. Conversely, some locals claim there is a big impact

	Visitors	Locals
Positive	<ul style="list-style-type: none"><li>Train service adds a lot of value and character</li><li>Bus connecting services are better</li><li>Staff on hand/ helpful</li></ul>	<ul style="list-style-type: none"><li>Train service adds a lot of value and character</li><li>More reliable/ at least you know what is going on</li><li>Plenty of services on the line</li></ul>
Neutral	<ul style="list-style-type: none"><li>May not be aware of any changes to services</li><li>Having to travel further with bags/ no help to get to rail replacement bus area/ from area to station</li><li>Confusing/ information not clear/ received wrong information</li></ul>	<ul style="list-style-type: none"><li>Its no better/ worse than before</li><li>Buses are slower than the train/ get delayed in traffic</li><li>Buses often run late (computer)</li></ul>
Negative	<ul style="list-style-type: none"><li>Not what they were expecting/ don't want to travel by bus/ not what you want at the end of a long journey</li><li>Delays to their journey/ waiting in the wrong place</li></ul>	<ul style="list-style-type: none"><li>Buses are quiet/ people are staying away/ perceived impact on economy ('tourism – dead')</li><li>Lack of trust in the service</li></ul>

# Previous Lakes Line experience

Before the rail replacement timetable locals refer to many issues on the line. Some find it more consistent now

Unexpected cancellations

*You hear stories about people needing to get a train but there being no train. If people need to travel, they will go another way*



Buses rather than trains

*Everyone is hopping up and down about it! Lots of complaints about it. Its been bad for a while, Northern are unreliable*

Last minute changes

*Can't afford to turn up at Windermere and lose your onward connections*

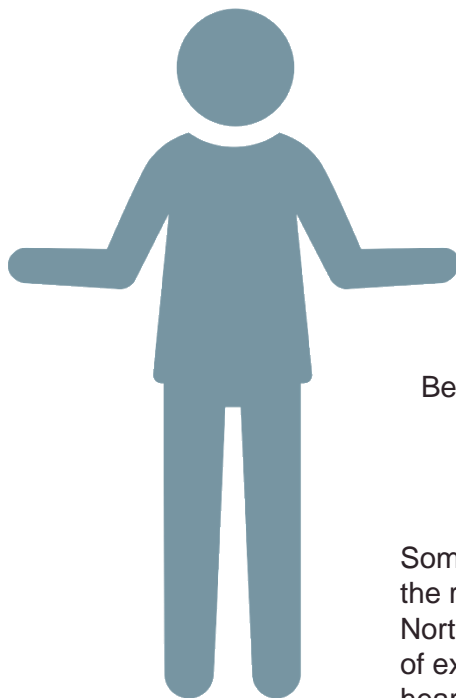
Being **stranded** at stations

*We were relieved there was a bus service as there have been problems*



Some do not place their trust in the rail replacement services or Northern in general, as a result of experiencing these issues or hearing of others doing so

*Frustrating to expect to catch a train - to arrive and find it has been cancelled at the last minute*



# Who is using the train and why

A mixture of curious locals, rail enthusiasts and visitors and many are keen for it to remain in service

*It's a boost to the local economy*



*Locals are saying about the West Coast Railway – can they stay?*



*Its [the rail service] got worse I wouldn't usually bother – I am waiting for the special train*

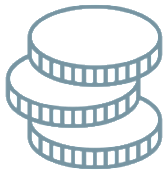


- There is going to be some element of the train being able to exceed expectations because they are not high at present and because there are regular bus services which take a lot of capacity
- A lack of information and the scheduling of services are not criticised as the rolling stock and service itself has a novelty value
- There is no doubt it attracts a lot of interest and pride
- A fair amount of passengers are those who are choosing to use it to make a trip/ visiting the area specifically to use the service

Locals feel very passionate about the Lakes Line (not just the new train). They frequently express opinions based on many years of experience. They don't want to lose it and feel its very important to the local area

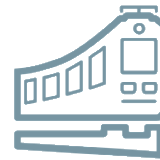
# Issues

There may be some issues with the system at the moment (which will apply to other rail replacement services) and although the rail service adds **so much** it does have complications...



## Who pays?

- Passengers question how much it is costing Northern to run the services. They link it with the industrial dispute and also the perceived lack of investment on the line
- If the train service is free are people paying for it when they shouldn't be? Bus staff think it is not free.
- Are people paying for Northern tickets when using the buses (perhaps not consistently).
- People are not sure if their tickets are valid on the train/ bus.



## Its different

- Its great people are having such a positive journey on the train
- However there is a risk, because the train times/ schedule/ not that easy to get hold of that people just turn up and don't leave enough time
- They may think that the train times are the same as before the revised timetable
- It might be better if people were aware that things are different, and that's not apparent to everyone at the moment



## Who knows?

- Passengers were not all aware of the rail replacement service being in operation even if they had purchased tickets online
- This is a perhaps missed opportunity
- National Rail Enquires was referred to be those who were aware
- Some know there are issues with Northern from the news or local knowledge
- Planning a journey is really important for some people, for example those with disabilities



## Enough info?

- There are potentially gaps in where information about **what to do next** could be missed
  - If no staff around
  - If staff around that do not have the fullest picture
  - If talking to staff is difficult
  - If there are no announcements/ can't understand or hear announcements
- There is not much information **on the platforms themselves**

# Conclusions and suggestions

There are a lot of services and there is choice available at the moment. People get to where they need to go but it could all be a bit clearer

## Conclusions

- On days and times of fieldwork people got to where they needed to go.
- There were options available.
- The special train service was felt to be a huge success and had a sense of occasion and joy.
- Many people reported a good bus journey.
- There was a mix of experience in terms of how easy and orderly the transitions and journeys were
  - Oxenholme could be seamless (but stories of issues at other times)
  - Windermere more chaotic but there are plenty of people around
  - Kendal station needs some more information
  - Burneside and Staveley have no staff and limited info, particularly about the train
- There is a strong sense for many in the community that the disruptions are damaging and this is why they relish the publicity and interest that the chartered service brings
- Rail service is a great addition but it adds a layer of complexity for passengers and this presents some snags

## What could work better?

Send an email before the journey

When people get off at a station or arrive at station there should be something that grabs attention and alerts people that there are changes to services and what those options are

**All staff should have all information** about services including the train

Train service should make clear that this is a replacement service and not the regular scheduled service and that passengers should check times for return trips

Windermere could benefit from more structure and designated waiting area

Information should be accessible to passengers to be able to determine what option is best for them



# Lakes Line Disruption to services

June 2018