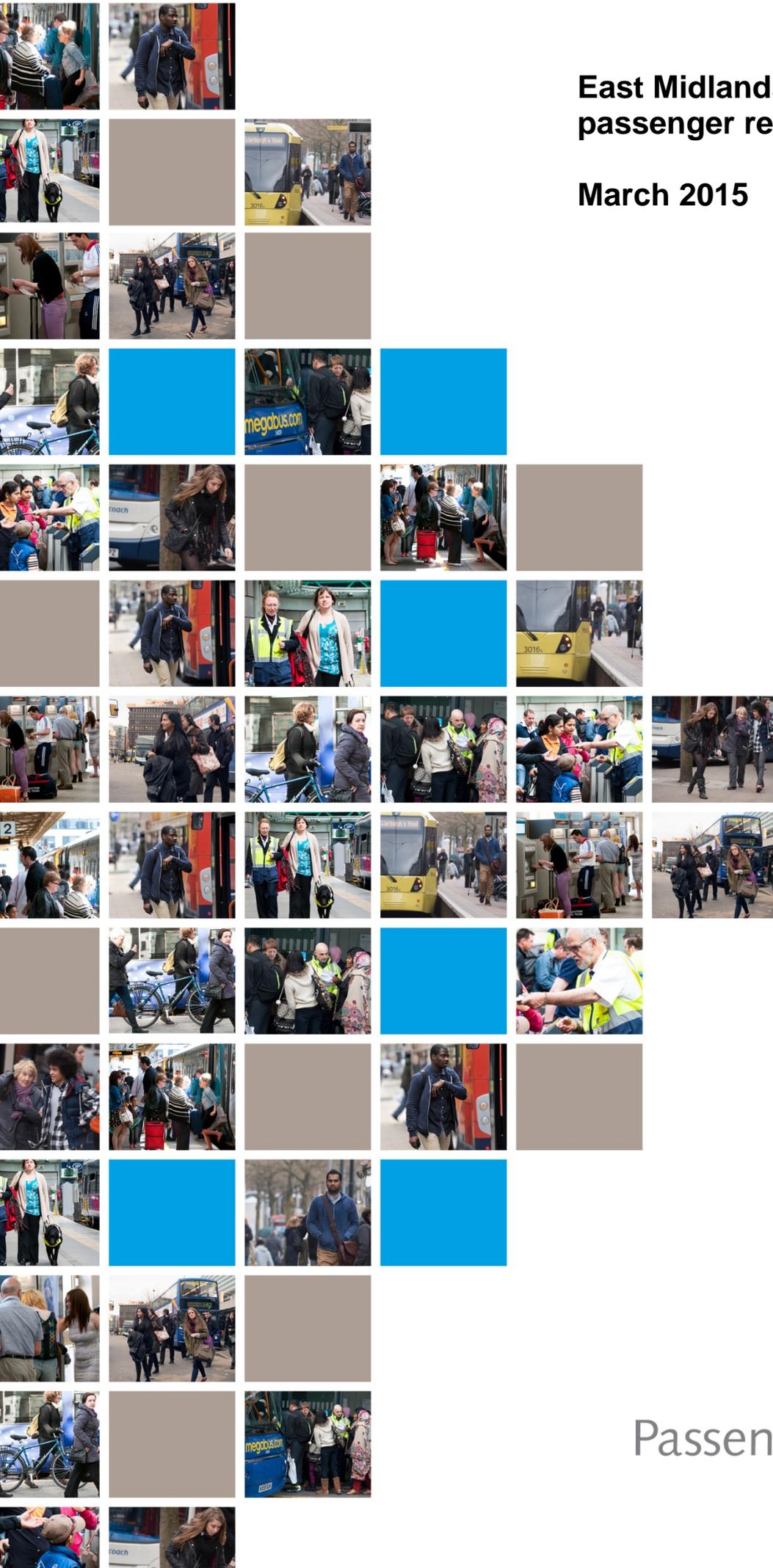


East Midlands rail franchise passenger research report

March 2015



1. Introduction

1.1 Research background

The current East Midlands franchise – operated by Stagecoach-subsidary East Midlands Trains (EMT) – will end in October 2015. It is anticipated that the Department for Transport (DfT) will negotiate a new two-year franchise with EMT, known as a direct award, which will see EMT run services until October 2017. A new franchise, awarded after a full competitive tender by DfT, would commence at that point.

1.2 Research objectives

The overall aim of this research, which was funded by DfT, was to understand EMT passengers' experiences and to identify their aspirations for the two-year direct award period and beyond.

In addition, the research sought to explore passengers' understanding of the franchise process and their desire for engagement with it, as well as reactions to Customer Reports produced by other train operating companies (TOCs).

1.3 Research methodology

Qualitative focus groups were convened with East Midlands Trains passengers and depth interviews were conducted with disabled users.

Focus Groups - eight, 90-minute focus groups were conducted across four locations (Leicester, Nottingham, Sheffield and Lincoln.) These were chosen to ensure that we sampled as much of the EMT network as possible, including both the main line to London and suburban routes into the region's towns and cities. Each focus group contained five or six respondents.

Depth Interviews – six, 45-minute depth interviews were conducted in the same locations as the focus groups with disabled passengers who use EMT services. Passengers taking part included those with learning disabilities, mobility problems and visual and hearing impairments.

Across the focus groups and the depth interviews passengers were using the train for either commuting, business or leisure purposes and we divided respondents into those making typical short journeys (less than 30 minutes) and those making typical longer journeys.

While the research was qualitative only, and so provides no statistics, this report draws on information from other Passenger Focus quantitative research to provide further detail and comparison. It also includes verbatim comments from passengers taking part in an online feedback exercise¹ which Passenger Focus undertook in late 2014 on behalf of DfT.

¹ The online feedback exercise was conducted through a questionnaire on the Passenger Focus website in late 2014. The feedback received is available [here](#)

2. Key findings

2.1 Passenger experience of using East Midlands Trains services

Overall, passengers' experiences of using EMT services were positive. This is consistent with other research, in particular the National Rail Passenger Survey (NRPS), which in autumn 2014 showed 88 per cent of passengers were satisfied with their journey with EMT, compared with the national average of 81 per cent. Furthermore, EMT was regarded as providing a better service than other TOCs operating in the region, notably CrossCountry, a finding mirrored in NRPS where 83 per cent of CrossCountry passengers were satisfied overall.

The frustrations passengers did express about EMT are mainly consistent with frustrations with the rail network in general. The high cost of travel was the area where most dissatisfaction existed, with the price of tickets felt to be disproportionate to the service provided. Again, this is consistent with NRPS which shows that slightly more than half of passengers (52 per cent) are satisfied with value for money on EMT, against the long distance sector average of 58 per cent. Other areas that caused frustration included overcrowding on the train and the inability to get a seat, as well as the level of disruption to EMT services.

Some passengers in the research reported a lack of basic amenities such as toilets, shelter and seating at EMT stations. This is perhaps explained by the number of rural stations EMT serves.

The views expressed are consistent with comments about station improvements from passengers taking part in the online feedback exercise. One passenger said:

"More rain shelters at small, open air stations."

(Long Eaton to London St Pancras passenger)

Another said:

"It's a small thing but putting the heater on in platform 1's waiting room would be nice."

(Loughborough to Sheffield passenger)

The lack of space for passengers waiting to catch EMT trains at London St Pancras may also be a factor. That issue attracted comments from passengers taking part in the online feedback exercise, including:

"More seating for passengers waiting to board trains at St Pancras would help older or frail passengers."

(London St Pancras to Market Harborough passenger)

Another said:

“Better waiting facilities at St Pancras. This may seem ironic for such a wonderful station but there isn't a great deal of room or facilities for those simply waiting to catch a train - or affected by delays.”

(Market Harborough to Leicester passenger)

2.1.1 Variation in experiences by location and passenger type

Experiences of travelling on EMT services was relatively consistent across each of the locations (Lincoln, Nottingham, Sheffield and Leicester), though some areas of dissatisfaction were particularly heightened in certain locations. These areas are listed below:

Lincoln

- stations are particularly spartan, without basic facilities
- too few carriages causes overcrowding on trains
- basic environment on trains, with no plug sockets, Wi-Fi or air conditioning.

Nottingham

- quality of rolling stock on some local services compares poorly with mainline services
- high frequency of disruption and delays to services.

Sheffield

- overcrowding, particularly at peak times
- commuter season tickets considered expensive relative to the service provided
- inadequate service on a Sunday
- high frequency of minor delays of five to 10 minutes.

Leicester

- high fares, pricey food/drink at the station and high car-parking charges
- commuter services during peak times particularly overcrowded.

A number of these issues are reflected in comments made in the online feedback exercise. One passenger said:

“Car parking is grossly overpriced. Recent annual increases in car parking charges have been excessive. I do feel that the tethered goat principle applies - I travel from a rural village and have no public transport alternatives available, so resent paying such high charges.”

(Loughborough to London St Pancras passenger)

Another said:

“More trains with power sockets and coat hangers. Sounds daft but being able to hang my jacket up rather stow it overhead is a bonus.”

(East Midlands Parkway to London St Pancras passenger)

In terms of variation in satisfaction by passenger type, commuters were generally less satisfied than business and leisure passengers. This was predominantly the result of high cost and less comfortable travelling conditions at peak times. This is supported by our *Rail passengers' priorities for improvements*² research, which suggests that commuters are more likely than both business and, particularly, leisure passengers to desire train tickets that offer better value for money.

2.2 Passenger aspirations for East Midlands Trains services

Passengers were asked to identify the area where they felt most improvement was needed to EMT services. The results show that of the six areas identified, improved value for money is most desired, followed by train reliability/punctuality and station environment.



This is consistent with our *Rail passengers' priorities for improvements* research which shows that better value for money of train tickets is the highest priority for improvement, indexing at 494 (almost five times the average priority for improvement). More trains arriving on time is also a priority, with an index of 178. 100 represents the average priority for improvement.

2.2.1 Why improvement is desired

There are several reasons why improved value for money is a high priority for passengers, and for commuters in particular:

- cost of travel is considered exorbitant in relation to the quality of the service – time-keeping, quality of rolling stock and ability to get a seat in busy periods
- year-on-year, above-inflation price increases
- no perceived improvement that justifies a higher fare
- felt to be disproportionate compared with other countries and other forms of transport.

In terms of train reliability and punctuality, the frequency with which disruption occurs is the key irritation for passengers. Delays are often short, consisting of only a few minutes, but these can occur several times a week and attract no entitlement to compensation.

² <http://www.passengerfocus.org.uk/research/publications/rail-passengers-priorities-for-improvements-october-2014>

2.2.2 Identifying short-term and long-term improvements

Given that EMT might be operating the East Midlands franchise only until October 2017, there was a need to identify both short-term improvements that EMT could achieve within two years, as well as longer-term improvements that would be the focus of the new franchise from 2017.

The improvements passengers want to see at EMT are not particularly radical or ‘blue sky’. This was perhaps to be expected given that passengers are relatively satisfied already. This meant that much of what passengers suggested was considered by them to be achievable by EMT. Passengers had lots of ideas they felt would deliver better value for money and they easily-identified ways to improve the station and train environment. However, they struggled to identify improvements where solutions were more technical, such as improving train reliability, communication of disruption and overcrowding.

Area	<i>Most desired short-term improvements</i>
Value for money	<ul style="list-style-type: none"> • clearer communication of ticket options and fares • no price rises (particularly on standard and season tickets) • easier, more straightforward application of delay repay and publicity of the scheme • season tickets holders able to reserve seats (something EMT had withdrawn) • Railcards valid in peak hours.
Train reliability and punctuality	<ul style="list-style-type: none"> • better communication about delays in advance of arrival at the station. For example, through apps, push notifications, text messages.
Station environment	<ul style="list-style-type: none"> • more, working ticket machines at the station • free, working Wi-Fi at the station.
Train environment	<ul style="list-style-type: none"> • cleaner carriages and toilets (where available) on board the train • free, working Wi-Fi on board the train.
Train service level	<ul style="list-style-type: none"> • more carriages on existing trains at peak hours • better provision of alternative modes of transport during planned disruption.
Customer service and staff	<ul style="list-style-type: none"> • more staff at the station, particularly for assistance and security.

Passengers taking part in the online feedback exercise echoed a number of these points. One said:

“More clarity about off peak/super and so on. When you buy a ticket from a machine it doesn’t tell you if you can use it at the time you are buying it.”

(Matlock to London St Pancras passenger)

Another said:

“For the most part, East Midlands Trains has made a HUGE improvement to the quality of trains/services. That said, too many services are run by single carriage trains and this frequently leads to overcrowding and total failure in the event of a breakdown with two train loads on the next single car train. This has to be addressed.”

(Tutbury & Hatton to Crewe passenger)

Area	Most desired long-term improvements
Value for money	<ul style="list-style-type: none"> • more proportionate, fairer fares (single tickets at 50 per cent of the return, rather than '90 per cent', fares reflective of distance travelled) • simplified ticket structure • loyalty scheme • ticket delivery through smart phone.
Train reliability and punctuality	<ul style="list-style-type: none"> • more punctual trains.
Station environment	<ul style="list-style-type: none"> • refurbishment of smaller stations and addition of basic amenities such as toilets, ticket booths/machines, shelter, seating, lighting and CCTV • better, more varied choice of food outlets at larger stations.
Train environment	<ul style="list-style-type: none"> • new rolling stock to include plug sockets, USB points, signal boosters to enhance reception, intercom systems to communicate with staff, information screens • new rolling stock with automatic ramps for easier boarding, larger carriages, accessible luggage storage, forward-facing seats, segregated areas for the disabled/elderly and bikes/luggage.
Train service level	<ul style="list-style-type: none"> • more trains during 'shoulder-peak' times, Sundays and at night.
Customer service and staff	<ul style="list-style-type: none"> • more staff on the train, particularly for cleaning purposes.

Again, these issues were reflected in the online feedback exercise. One passenger said:

“Actually arrive when they say they will and leave when they say they will, this would be a great improvement.”

(Metheringham to Lincoln passenger)

Another passenger said:

“The times of the Sunday service is poor. The trains do not run with enough regularity, the same can be said of the evening service, the service time are a little erratic.”

(Kirkby in Ashfield to Mansfield passenger)

And another commented:

“An earlier start to trains leaving Derby for Matlock on a Sunday morning and an hourly service on Sundays. Not being able to reach Matlock before 10:30 on a beautiful summer’s day is ridiculous. If I just miss a return train I have a two-hour wait. That just isn’t on.”

(Derby to Matlock passenger)

2.3 Awareness of Franchise Process

Passengers’ knowledge of the rail franchise process is vague at best, which leads to suspicion and cynicism in many cases. The assumption that it is all about lowest cost/highest profit for shareholders was widespread. Where there was understanding it tended to be informed by:

- memories of the last franchise change (Midland Mainline and Central Trains to EMT)
- the media (and the East Coast franchise award announcement in the week of the research)
- professional experiences of tender processes/government procurement.

<i>What passengers know</i>	<i>What passengers don't know</i>
<ul style="list-style-type: none"> • different train companies operate different parts of the network and they do so for a set period • TOCs bid against each other to run the service within a region, every few years • different operators of infrastructure and trains, and even services on board, such as Rail Gourmet • Government is involved "in some way", but TOCs answer to shareholders as well as Government. 	<ul style="list-style-type: none"> • criteria for evaluating bids, and who sets them • who decides which bidder is awarded the contract, or anything about the stages in the process • how long the contracts are, and that they can be ended early in certain circumstances • that passengers have input to the franchise process • what the scale of change could be if a new TOC is awarded the franchise – and whether they then have free rein or not.

Press coverage of the Intercity East Coast franchise award had received some notice, but no one knew that change was pending in the East Midlands. Passengers expected to find out such things through local media, but saw it as a closed process in which the customer takes no part (and is usually informed only once decisions are final).

2.4 Relationship with East Midlands Trains

Most passengers did not feel a sense of 'relationship' with the operator, and on reflection some were surprised at how little they knew or felt about the brand given its relative prominence in their lives. The lack of affinity towards EMT was partly as a result of passengers not feeling that EMT valued their custom, and many feeling that it was fairly inaccessible, both in person on trains and at stations, and by telephone or email.

This is consistent with findings in our *Passengers' relationship with the rail industry*³ research, which highlighted the lack of a relationship between customer and supplier in the rail industry. That said, of the 21 train companies whose passengers were sampled in the research, EMT was tenth in terms of passenger 'trust in relationship' with their train operator.

Moreover, passengers claim that they would be disappointed to see EMT replaced as the operator of the East Midlands franchise in 2017:

- many felt they had 'learned the ropes' with EMT and did not want to start afresh
- some were concerned that a new franchise could be worse, not better
- passengers recall that when EMT took over from Midland Mainline and Central Trains it took them a year or so to 'get up to speed' and commuters (in particular) dreaded this happening again
- a feeling that the operator is almost synonymous with the region's identity.

³ <http://www.passengerfocus.org.uk/research/publications/passengers-relationship-with-the-rail-industry>

2.5 Reactions to Customer Reports

Passengers responded positively to the Customer Reports that they were shown (c2c and Govia Thameslink Railway). They are seen to offer transparency and information about the future of the network, where investment is made, and the franchise process. The content of the report was more interesting for those making regular journeys by train, such as commuters, than infrequent users.

The key desire from passengers for any EMT report, would be for information about fares. This included a desire to understand where the money from fares goes, the expected increase in fares over the next few years, as well as the reason increases are necessary. This is reflective of passengers' key concern about price and value for money.

3. Summary

Overall, passengers seem broadly satisfied with EMT services and are not displeased that the operator is likely to be granted a direct award for the next two years. Any dissatisfaction that exists is consistent with the rail industry in general and includes the high cost to travel relative to the service provided, delays and disruption and overcrowding, particularly at peak times. The area that receives more attention than might be expected compared with other TOCs is the environment at the station. Passengers consider some EMT stations are particularly spartan and lack even the most basic of facilities. This may be a result of the number of smaller rural stations EMT serves.

Given that EMT passengers are, on the whole, satisfied with the service they receive, it is perhaps no surprise that desired improvements are not particularly radical or 'blue sky' – and are perceived by passengers to be reasonably realistic for EMT to achieve in the direct award period. Improvements are most desired to value for money and passengers can identify short-term 'fixes' that should be EMT's focus, as well as longer-term improvements that should be aims for the new franchise come 2017.

An improvement in satisfaction with value for money will ultimately help to increase the extent to which passengers feel a relationship with EMT. More openness and transparency will also help to improve the relationship and the impending Customer Report provides an opportunity to address this.

**Passenger Focus
March 2015**



East Midlands Rail Franchise Passenger Research Research Debrief

Prepared for: Passenger Focus

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PREPARED BY ILLUMINAS
a global team based in London, New York and Austin

Prepared in compliance with the International quality standard covering market research, ISO 20252 (2012), The MRS Code of Conduct, and the Data Protection Act 1998 by Illuminas, 183-203 Eversholt Street, London NW1 1BU, UK

T +44 (0)20 7909 0929 F +44 (0)20 7909 0921 E info@illuminas-global.com

www.illuminas-global.com



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EAST MIDLANDS
TRAINS

Background, Objectives and Methodology



Background

- The current East Midlands franchise - held by Stagecoach East Midlands Trains (EMT) – is due for renewal in October 2015. The network stretches from London up to Liverpool in the North West and Norwich and Skegness in the East.
- It is anticipated that the Department for Transport (DfT) will negotiate a new two-year franchise with EMT, known as a direct award, which will see EMT run services until October 2017. A new franchise, awarded after a full competitive tender by DfT, would commence at that point.
- Passenger Focus - as the independent voice of the rail passenger - has a significant role in the franchising process, both in terms of providing evidence of passenger experience and setting out passengers' aspirations for new franchises, as well as providing formal input in to franchise consultation exercises, including providing information to prospective bidders
- Given the above, Passenger Focus commissioned research, working in partnership with DfT, to understand EMT passengers' experiences of the incumbent operator and to identify their aspirations for the two year direct award period and beyond.





Objectives

- The overall aim of the research is to understand passengers' current experiences with Stagecoach East Midlands Trains and their aspirations for the immediate and longer-term future of the East Midlands franchise.
- The specific objectives of the research were as follows:
 - Understand passengers' use and experience of the railways under the existing franchise, their frustrations and their aspirations for the future
 - Explore passengers' awareness of the franchising process and their desire for engagement
 - Obtain passengers' aspirations for the direct award period and the next franchise; these should include:
 - The environment at the station, for example, cleanliness, information, ticket purchasing facilities, shops, restaurants and toilets
 - The environment on board the train, for example, cleanliness, toilets, seating, air-conditioning/heating, food/drink
 - The frequency of the train service and capacity that the train runs at
 - Customer service and staff, including the attitudes of staff, number of staff in station and on board the train
 - The reliability and punctuality of trains such as the level of disruption and delays
 - Value for money, for example, the choice of tickets and cost to travel
 - Understand any specific issues affecting disabled travellers
 - Obtain passengers' attitudes towards the proposed Customer Report to be produced by each franchisee, potentially also including feedback on an example report from another franchise.



Methodology

- Qualitative focus groups were conducted amongst East Midlands Trains passengers and depth interviews with some disabled users of the service

Focus groups

- 8 x 90 minute focus groups
 - 2 x Leicester
 - 2 x Nottingham
 - 2 x Sheffield
 - 2 x Lincoln
- Amongst commuters and business/leisure passengers
- Groups contained between 5 and 6 respondents
- Passengers used a mix of main and suburban lines into the town and city centres
- Passengers made short (less than 30 minutes) and long (more than 30 minutes) journeys

Depth interviews

- 6 x 45 minute depth interviews
 - 2 x Leicester
 - 1 x Nottingham
 - 1 x Sheffield
 - 2 x Lincoln
- Amongst commuters and business/leisure passengers
- Disabled passengers included those with learning disabilities, mobility problems, visually impaired and hearing impairment.



Research Schedule

- The complete, detailed schedule of focus groups:

LOCATION	GROUP NO	DEMOGRAPHICS	TRAIN USAGE
Sheffield	1	Younger, C1C2D	Commuter
	2	Older, ABC1	Business/Leisure
Nottingham	3	Older, C1C2D	Commuter
	4	Younger, ABC1	Business/Leisure
Lincoln	5	Older, C1C2D	Commuter
	6	Younger, ABC1	Business/Leisure
Leicester	7	Younger, C1C2D	Commuter
	8	Older, ABC1	Weekend travellers

Passenger experiences of using the East Midlands service



East Midlands Trains service largely satisfactory

- On the whole, experiences of using the East Midlands Trains service are positive
- Passengers inevitably have the odd 'horror story', but these are masked by a satisfactory service the majority of the time
- In fact, the East Midlands Trains service is viewed as better than other TOCs operating in the region e.g. Cross Country
- The frustrations that passengers do have with the East Midlands Trains service are mainly consistent with the rail network in general and other TOCs
- For example:
 - Overcrowding, high cost to travel and disruption to services
- There is particular dissatisfaction with the number of facilities available at the station. Dissatisfaction with this area is perhaps higher than might be expected and reflective of some of the more rural stations that EMT service.
- In common with other research, commuters are less happy than more irregular business/leisure passengers
 - This is predominantly as a result of the high cost to travel during peak times when overcrowding is at its height
- There is little variation in the overall satisfaction of EMT by area.

*"They're better than the Cross Country trains. They're (Cross Country) so small and you can barely walk up and down the aisles."
Sheffield group, Commuter, Younger*





Experiences relatively consistent across lines

- Stations particularly spartan
- Trains overcrowded due to lack of carriages
- Environment on board the train basic e.g. no plug sockets/ Wi-Fi/ air conditioning

- More consistent quality of rolling stock between mainline and local services with some local services in need of updating
- Better time-keeping
- Overcrowding

Lincoln

Nottingham

Sheffield

Leicester

ISSUES EXPERIENCED BY THE MAJORITY

- Lack of facilities at the station
 - Disruption and delays
 - Overcrowding
- Cost of travel not reflective of service received

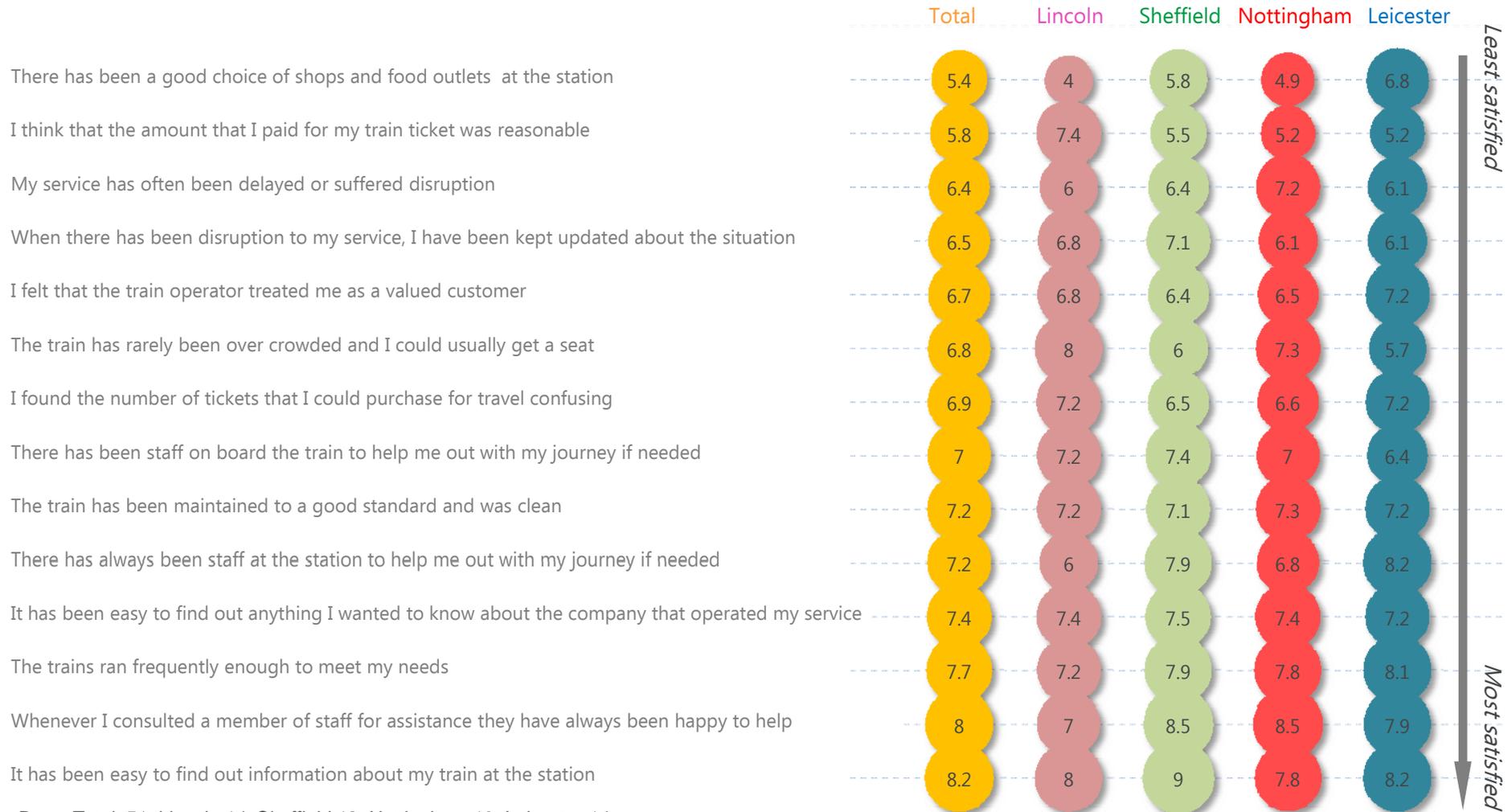
- Overcrowding on commuter services during peak travel
- Commuter season tickets considered expensive given the service received
- Rural stations unstaffed, with no/few facilities
- Minor delays frequent e.g. 5-10 minutes
- Sunday services particularly infrequent

- Cost, including costs of additional services such as food and drink in stations, parking etc.
- Overcrowding on commuter services
- Security on unstaffed stations (including car parks)



Lack of facilities at the station (particularly Lincoln and Sheffield), cost of travel and disruption cause most dissatisfaction

Passengers were asked to rank on a scale of 1-10 the extent to which they agreed or disagreed with each of the following statements (1=completely disagree, 10=completely agree). They were asked to think about their experience when travelling with East Midlands Trains specifically.



Base: Total 51, Lincoln 14, Sheffield 13, Nottingham 10, Leicester 14

These figures should not be taken literally, but used only as an indication, due to the low base sizes

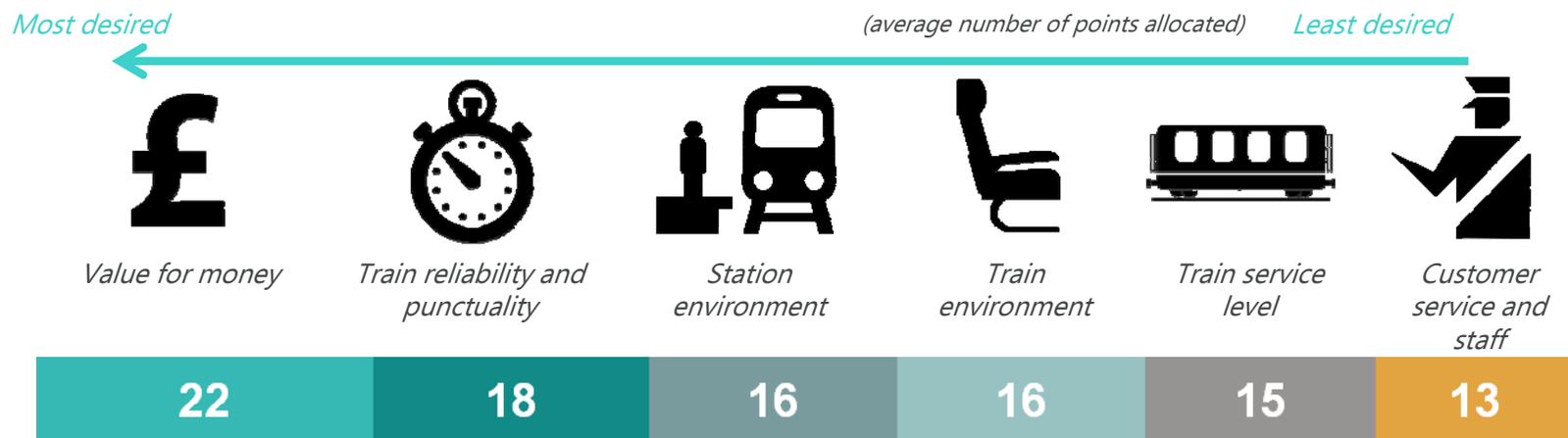
Passenger aspirations for the East Midlands service



Improvements desired across the whole customer journey

- At an overall level, EMT passengers' desires for improvement are broad with no significant standout area

Passengers were asked to allocate 100 points across six key areas for improvement. They were required to award the highest number of points to the area which they felt needed most improvement



Base: Total 51, Lincoln 14, Sheffield 13, Nottingham 10, Leicester 14
These figures should be used only as an indication, due to the low base sizes

- In Lincoln and Sheffield, the desire for improvement in the **station environment** is given more importance compared to in Nottingham/Leicester
- Likewise the **reliability and punctuality** of trains
- In Nottingham and particularly Leicester, **value for money** takes precedence as the main area for improvement.

*"The worst part is that as the prices go up, you feel the service gets worse. The staff on the trains seem miserable and you don't see as many of them, services are delayed about 1 journey in 3, and you even have to pay for wifi!"
Leicester group, Commuter, Older*



Why improvement is desired?



Value for money

- Particularly in Nottingham/Leicester, cost of travel considered exorbitant:
 - Especially in relation to the quality of the service – time keeping, quality of rolling stock, and ability to get a seat in busy periods
 - Yearly increases above inflation with no communication of reasons for this and anything additional they will receive for the increased tariff
 - Perceived to be disproportionate compared to other countries and forms of transportation

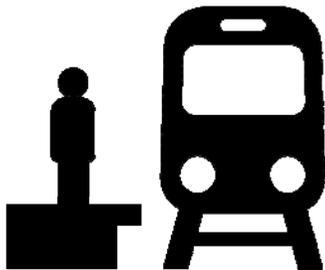
- Delays and disruption experienced is often minor, consisting of several minutes, rather than any longer
- Though delays do occur on a regular basis
- Communication of disruption at the station is considered good, though advanced warning of disruption before arrival at the station is desired.



Train reliability and punctuality

"There is nothing at the station, not even a vending machine. I have to go to the Sainsbury's across the road if I need to use the toilet."

Lincoln group, Business/Leisure, Younger

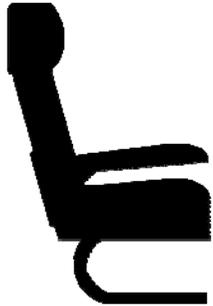


Station environment

- Particularly an issue for passengers using smaller stations e.g. Ruskington
- Improvements desired are wide ranging, encompassing eating, toilets and waiting facilities.



Why improvement is desired?



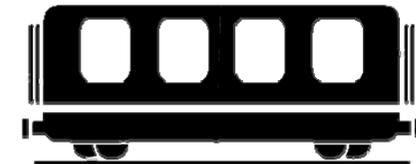
Train environment

- Passengers do not struggle to suggest ways to make the environment on board more comfortable and enjoyable
- Facilities on board the train are often basic, particularly on shorter, commuter trains

"I'm fortunate that I can work flexi-time, so I get a train before the rush hour at around 7 in the morning, this way it's not too busy, but I wouldn't want to catch it any later because it's so busy."
Sheffield group, Commuter, Younger

"The plug sockets are always broken, the top plastic bit always breaks off into the socket and no one thinks to fix them!"
Lincoln group, Commuter, Older

- Passengers fairly content with the frequency of the train service, even at the weekend
- Though commuters do complain from overcrowding on peak services



Train service level

"The station is completely unstaffed, there is never anyone there. If the ticket machine is broken, which it often is, you have to get a ticket from the permit to travel machine."
Leicester group, Commuter, Older



Customer service and staff

- Staff are considered helpful and friendly whenever consulted for information or help
- However, there is an obvious lack of staff, on board the train and at the station.



Aspirations are realistic and achievable

- Perhaps understandably, given the relative satisfaction with the East Midlands Trains service, passengers' desires for improvement are not particularly radical or 'blue sky'
- Passengers are able to identify a plethora of ways to improve the station environment, train environment and attain better value for money
- However, they struggle with the more technical aspects
 - For example, suggesting how trains might be made more punctual or how the TOCs should cope during disruption

"Just a bench to sit on on the platform when I'm waiting for my train would be something."

Lincoln group, Business/Leisure, Younger

"Trains in Japan and Germany are renowned for being reliable, so can we not have a look at what they are doing and replicate the model."

Sheffield group, Disabled user, Older



- Passengers say that there are plenty short term, improvements that can be made to the East Midlands Train service that would boost satisfaction further
 - Passengers believe that much of what they suggested is realistic and achievable in the next two years.



Aspirations: Value for money

Choice

- Simplified ticket choices, making clear the best value for money option
- 5 day (rather than 7 day) weekly tickets for commuters
- Return tickets valid for any period, not constrained by a day or time
- Able to choose specific seats when booking tickets e.g. airline style

Pricing

- No price rises
- Single tickets proportionally priced against returns i.e. 50% of the price of a return, rather than '90%'
- Fares reflective of distance travelled
- Cheaper standard long distance tickets
- Split ticketing kept less secret (or abolished in place of better overall fares)
- Cheaper car parking, or free when using the train service

Loyalty

- Loyalty scheme where points are earned for travel
- Railcards valid in peak hours
- Season/carnet ticket holders able to reserve seats
- Delay repayment to be publicised and easier to claim i.e. on-line, compensation paid directly into account

Provision

- Tickets delivered on smart phone/smart card
- Straightforward/faster purchasing of season tickets e.g. online
- Consistent 'rules' about travelling on the network without a ticket.



Aspirations: Train reliability and punctuality

Dealing with disruption

- Ultimately passengers desire more timely services
 - Commuters are less tolerant of delays, even if it consists of only a couple of minutes
- Faster trains (to make up lost time), or more carriages (to allow for quicker boarding/disembarkment) seen as a way to reduce minor delays
- For more significant delays, passengers can identify ways to reduce the impact:
 - Increased flexibility so tickets can be used on other services and modes of transport
 - Better provision of alternative modes of transport during significant delays and planned disruption e.g. replacement buses/coaches running to the same timetable as the train

Communication during disruption

- Communication of delays in advance of arrival at the station e.g. through push notifications/text messages
- Increased publicity about delay repayment scheme and making it more straightforward to claim.

"It (communication) is good at the station about delays. But I sometimes think that if I had known about that earlier, I could have gone an alternative way, or would have taken the car."

Sheffield group, Commuter, Younger





Aspirations: Station environment

Larger stations



- Better, more varied choice of food outlets at stations
- Free Wi-Fi and charging points

"It's always the same, you know you'll have to get your lunch from Upper Crust or Burger King. I want to see some variety, perhaps some local businesses selling local produce."

Sheffield group, Business/Leisure, Older

- Free, accessible toilets i.e. on each platform
- Ticket window open for longer hours
- Multiple, working ticket machines
- Shelter on the platform to protect from elements
- Seating on the platform
- Better lighting/brighter for safety and security
- CCTV in operation.

Smaller stations





Aspirations: Environment on board the train

Cleaner

- More and accessible bins on board to dispose of rubbish
- More frequent cleaning regime (not just at destination stations)
- Regular (i.e. hourly) quality and cleanliness checks
- More and cleaner toilets on board

*"Ideally you'd have staff walking up and down cleaning the carriages, however, there is no way they'd be able to move up and down the carriage as people stand in the aisles."
Sheffield group, Commuter, Younger*

Technological

- Plug sockets and USB points for every seat
- Free and working Wi-Fi
- Signal boosters to enhance 3G and reception
- Intercom system to communicate with member of staff (for security & information purposes)
- Information screens displaying next calling point and entry platform number

*"The luggage racks above the seats are too small. Why did they make them so small? You can't fit anything in them. And I don't want to leave my bag at the other end of the carriage."
Sheffield group, Business/Leisure, Older*

Layout

- Automatic ramps for easier boarding onto train
- Larger, more 'roomy' carriages
- Luggage storage at every seat, rather than at ends of the carriage
- Forward facing seats
- Designated areas for disabled/elderly passengers and bikes/luggage
- Better indication of where to board for reserved seats.

Applicable to Business/Leisure journeys



Aspirations: Train service level

- More trains desired in the 'shoulder' peak i.e. between the peak and off-peak
- More trains to run on a Sunday, particularly at rural stations
- Trains to run later into the night i.e. past midnight

"The trains go from running four times an hour in the peak period to once in the off-peak, with nothing in between. You're rushing to get that last train and it is always packed."

Sheffield group, Commuter, Younger



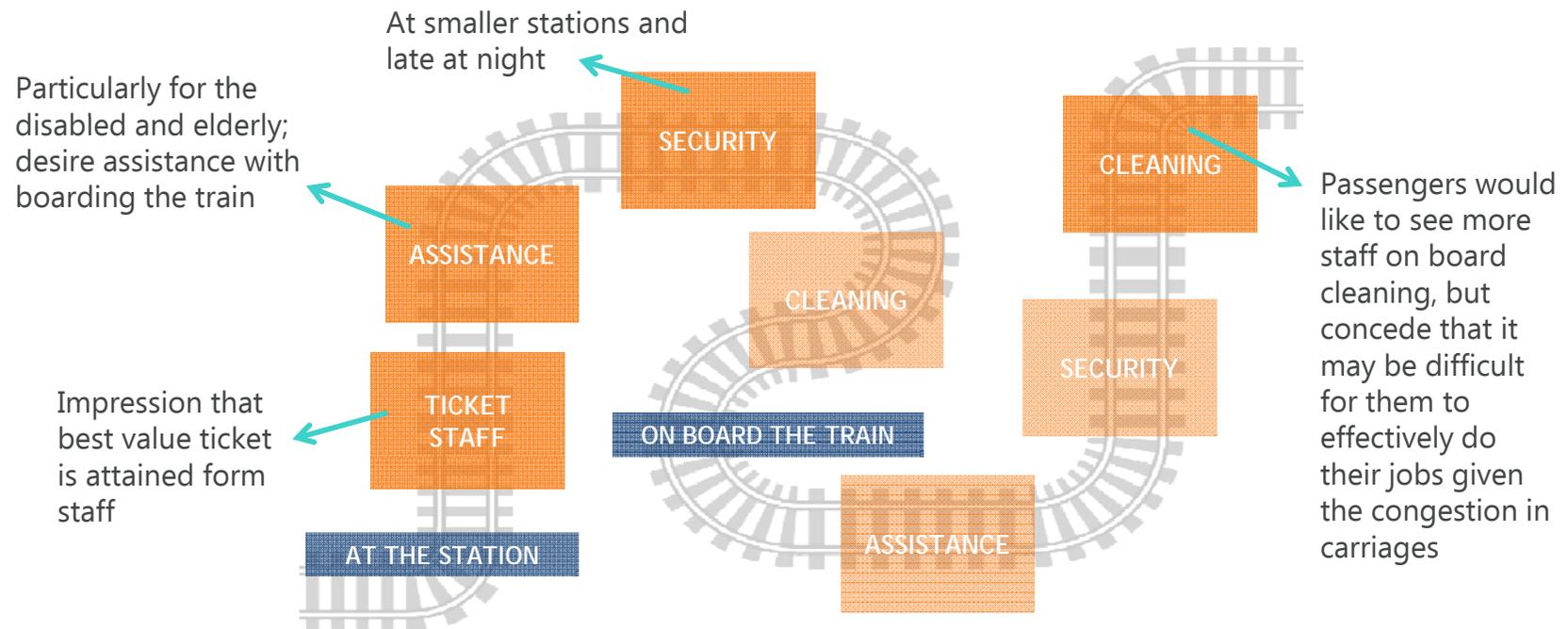
Overcrowding

- Overcrowding is considered an issue amongst EMT passengers, however, a higher frequency of trains is not considered the answer to solve the problem
 - Passengers would rather see more carriages added to existing carriages during peak hours, to deal with the issue
- Disabled passengers believe that they should be allowed access to first class if there is no seating room available in standard class
- Better information on seats that are available, and not reserved, on board.



Aspirations: Customer service and staff

- Although not the most desired area of improvement, in an ideal world, passengers want to see more staff across all stages of the customer journey
- However, there are some standout areas:



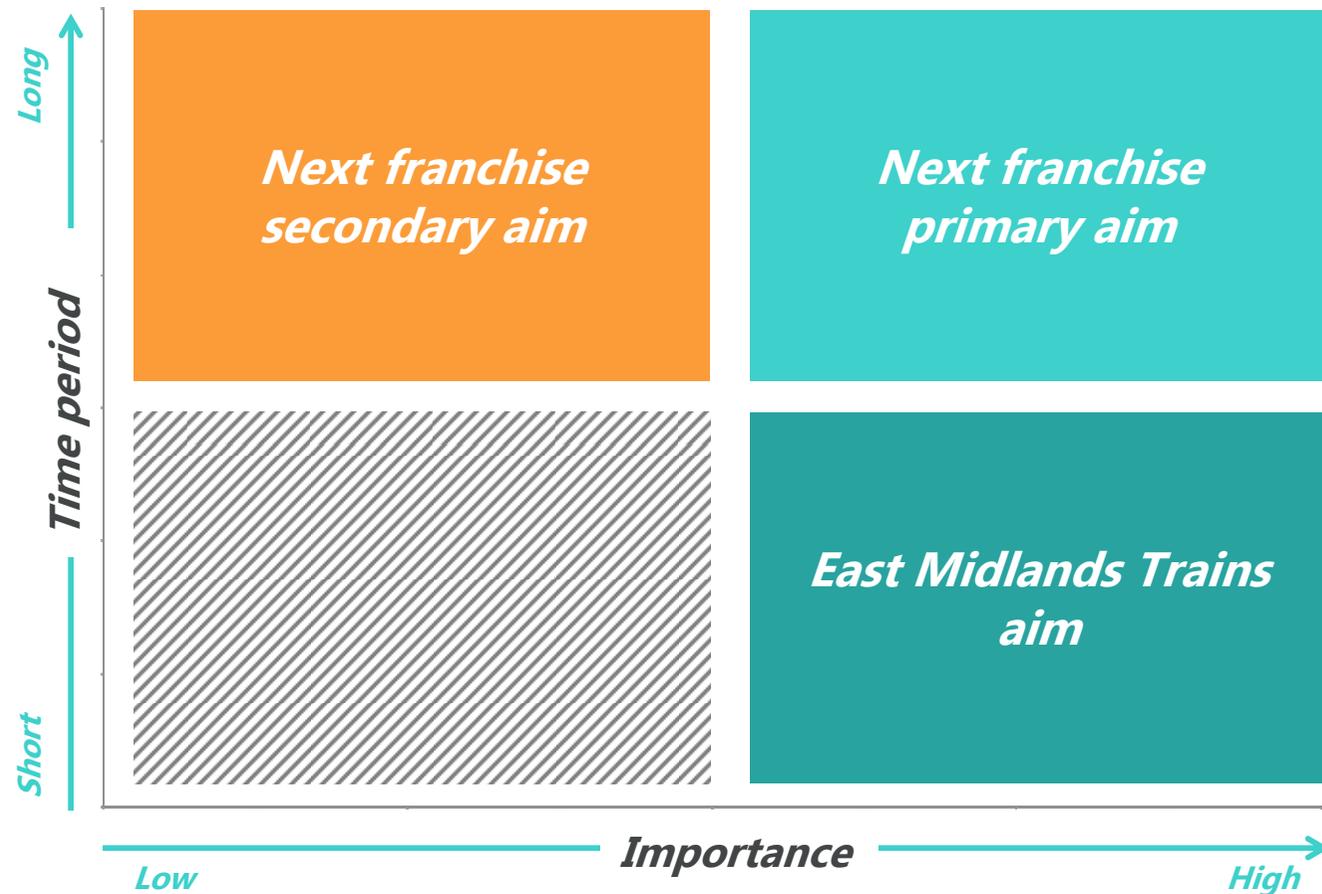
- Passengers praise the helpfulness, friendliness and attitudes of staff that they do come into contact with
- With one exception... Revenue protection staff
 - Often rude, ignorant and 'treat you like a criminal', even when reasons for not having a ticket are completely out of passengers' control.

Defining improvement areas for East Midlands



Where should the focus be?

- Given that EMT are expected to control the network for the next 2-3 years, the focus should be on the high importance improvements that are perceived to be achievable within this time period
- Those perceived to be longer term improvements are assumed would be the focus for the next franchise from October 2017.





Most desired short term improvements



- Clearer communication of ticket options and fares
- No price rises (particularly on standard & season tickets)
- More, working ticket machines at the station
- More carriages on existing trains at peak hours

Problem avoidance

- Better communication about delays in advance of arrival at the station e.g. through Apps, push notifications, text messages
- More staff at the station, particularly for assistance and security

Information about problems

- Easier, more straightforward application of delay repayment. Also, publicity of the scheme
- Better provision of alternative modes of transport during planned disruption

Problem resolution

- Cleaner carriages and toilets (where available) on board the train
- Free, working Wi-Fi at the station and on-board the train

Distraction

Passengers believe that the improvements set out here are all achievable within the short term (maximum 3 years).

In no particular order



Most desired long term improvements

- More proportionate, fairer fares
- Simplified ticket structure
- Loyalty scheme

A fairer deal

***Next franchise
primary aim***

- More trains during 'shoulder' peak times, Sundays and at night
- More punctual trains

A better
service

- Ticket delivery through smart phone
- New rolling stock taking into account technological desires and layout preferences
- Refurbishment of smaller stations and addition of basic amenities
- More staff on the train particularly for cleaning purposes
- Better choice of food/drink/shopping outlets at larger stations

An enhanced
experience

In no particular order

Awareness of Franchise Process



What do passengers know about rail franchising?

- Knowledge of the rail franchise process is vague at best, and this leads to suspicion and cynicism in many cases. The assumption that it's all about lowest cost/highest profit for shareholders was widespread
- Where there is understanding, it is informed by:
 - Memories of the last franchise change (Midland Mainline to EMT)
 - The media (and the East Coast franchise announcement in the week of the research)
 - Professional experiences of tender processes/government procurement

<i>What passengers know</i>	<i>What passengers don't know</i>
<ul style="list-style-type: none">• Different train companies operate different parts of the network and they are incumbent (and hold a 'monopoly' on that part of the track) for a set time period• TOCs bid against each other to run the service within a region, every few years• Different operators of infrastructure and trains, and even services on board (i.e. Rail Gourmet)• Government are involved "in some way", but TOCs answer to shareholders as well as Government	<ul style="list-style-type: none">• Criteria for evaluating bids, and who sets this criteria• Who decides which bidder is awarded the contract, or anything about the stages in the process• How long the contracts are, and that they can be ended early if deemed necessary• That passengers have input in franchise process• What the scale of change could be if a new TOC is awarded the franchise – and whether they then have free rein or not

"I think its like any other Government process really – everyone bids and the highest bidder or lowest prices, whichever it is – will win and take the contract on."

Nottingham group, Commuter, Older

"I've heard of Network Rail and National Rail Enquiries but I couldn't really tell you what each of them does."

Sheffield group, Commuter, Younger



No awareness of upcoming franchise process in EM

- Press coverage of East Coast franchise process had received some notice but no one knew that East Midlands was pending
 - People expected to find out such things through local media, but saw it as a closed process in which the customer takes no role (and is usually only informed once decisions are final)
 - Even when told the research formed part of this process many were sceptical about the role of the traveller in awarding the contract!
- The news of the short-term direct award received mixed responses:
 - Some felt this was an excellent opportunity for EMT to prove they are suitable to continue with the contract on the long-term future and would therefore be 'on best behaviour'
 - Whereas others felt that EMT would anticipate losing the contract and efforts would be minimal if they didn't see a long term future in the region

*"The first I heard about it was as a result of this research. They haven't communicated anything about it on the trains or in the media."
Sheffield group, Commuter, Younger*



Little sense of relationship towards EMT, although a change of operator represents uncertainty

- Most customers didn't feel a sense of 'relationship' with the operator, and on reflection some were surprised at how little they knew or felt about the brand given its relative prominence in their lives
- Very few reported a sense that EMT valued their custom, and many felt they were fairly inaccessible, both in person on trains and stations and to phone up or email
 - Sense of delay between complaints and resolution
- This said, there was a perceived value in familiarity and 'better the devil you know'
 - Many felt they had learned the ropes with EMT and the workings of the systems and didn't want to learn them afresh!
 - Some concerns that a new franchise could be worse, not better
 - When EMT took over from Midland Mainline apparently it took them a year or so to 'get up to speed' and commuters (in particular) dreaded this happening again
- Minority had very warm feelings towards EMT and a sense that the operator is almost synonymous with the region's identity
- Virgin Trains were mentioned spontaneously as an operator that would be welcomed in the region
 - Recognised brand
 - Experiences of using the services have been good – clean, modern, comfortable rolling stock
 - People respected the company's heritage

"It's hard to feel anything for them because they are just very standard – nothing special to them really."

*Leicester group,
Commuter, Younger*

"They do send emails, and in fairness I do like the website, it's quick and easy to use, but I still don't feel I know anything about them!"

*Leicester, group
Weekend Traveller, Older*

"I wouldn't want East Midlands Trains to go.. I'd even miss the logo, to me it's iconic, with the Andy Warhol-style font. If they went I would really worry that the useful little services I rely on might go too. At the moment I can get anywhere I need by train, I don't drive so it's crucial for me."

Nottingham group, Disabled User, Older

Reactions to Customer Reports



Initial reactions towards Customer Reports positive

- Passengers respond well to the notion of Customer Reports
 - (Based on the c2c and GTR reports that passengers were presented with)
 - Perceived transparency is the key benefit – especially in the context of some suspicion about the process of franchise awards and belief that there is nothing making bidders ‘live up to their promises’
- No one had seen anything like this before, and many asked how it would be distributed
 - Slight tension between liking the transparency and concern at the expense of production and whether people would read it
 - Should be available on the trains themselves, in waiting rooms/ticket offices and online. A minority felt it should be posted out to those on the TOC’s mailing list
- Regular train users, especially those commuting or making regular journeys, were much more interested in the Customer Report than more infrequent users, particularly those using the trains exclusively for leisure
- Travellers expected the report would focus on punctuality and improvements planned in terms of journey speed (i.e. high speed services to London)
 - This reflects the key concern for many customers
- There was also some demand for value for money information – and how fare increases were being spent – again reflective of key pre-occupations amongst more frequent train-users
 - The report was felt to be a suitable forum to explain these much-disliked rises

“You can hide a lot in statistics though. I’d be more interested in customer experiences and how well they rate the railway in some ways.”
Leicester group, Weekend Travellers, Older

“I definitely think it’s a good thing if they know they have to deliver on their promises, and customers can actually check that and see how they’re doing.”
Leicester group, Commuter, Younger



Both content and presentation needs refinement

Content

- Future plans for the railway, customer experience and how to feed back in case of issues were the most interesting parts, with other sections felt to be 'fluff' (Managing Director's Welcome Message, Sustainability, Leadership and People and Business Excellence)
- Some disappointment the content wasn't more closely structured around 'we promised...we delivered' format
- Some found it hard to navigate the document (no contents page)

*"I'm only interested in the punctuality but I cant even find that bit in all these pages!"
Leicester group, Commuter, Younger*

*"I have to say they're being pretty brave here, in admitting they aren't hitting any of their targets!"
Leicester group, Commuter, Younger*

Presentation

- Text too small for many and layout (C2C in particular) inconsistent, with densely worded pages followed by highly visual spreads
- Infographics (C2C) not to scale and therefore highly misleading in places
- Overall document too long and some felt it was targeted towards investors more than passengers due to corporate / wordy tone and content (i.e. 'Business Excellence' section)

*"I think these targets are just ridiculous – making 10 more employees happy? Is that what 'engagement' means? Why do we care?"
Leicester group, Commuter, Younger*

*"There is nothing at all about the prices!"
Nottingham group, Commuter, Older*



The promise of the report is transparency, but some examples of content that seem deceptive

- For this report to fulfil the passenger's need for clear and transparent communication, every element of the content needs to espouse this
 - This is a key opportunity to overcome some of the scepticism around franchise arrangements but if the document does not deliver the suspicion flares again
- Extremely clear and consistent formatting will help readers to appreciate the document as an honest report on the franchise's progress and plans for the future
 - Sub-headings and sign-posting will help with this, as will the removal (or summarisation) of some of the more 'corporate' sections
- Some commented that they would prefer much more direct language and possibly even a consistent structure around targets and performance
 - 'We said....., we have....., we will.....`
 - Or even 'You asked us for.....We gave you...!'
 - Albeit this language may be needed to explain the factors involved in reaching the targets that have been set and the steps that are involved.

*"I like that there is a picture of the Managing Director. That really gives the impression that he is putting his neck on the line and is happy for people to know who he is instead of hiding."
Lincoln group, Commuter, Older*

*"The document is really disconnected, its like 2 completely different people wrote it! Sometimes its all wordy and on other pages there's nothing but graphics – as a reader it makes it harder to process."
Nottingham group, Commuter, Older*



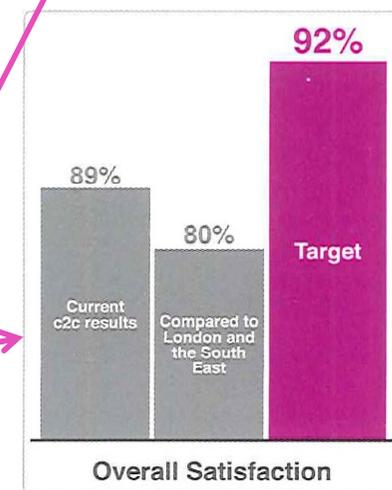
Communication of data misleading or needless in places

- Infographics were divisive with some feeling they made a good change for wordy content but others struggling with comprehension.
- Those who were experienced with such formats very dissatisfied with the scales used in the C2C document
 - Infographics should be a deliverable that proves transparency, rather than demonstrates manipulation – care must be taken to make them appropriate
 - Additionally they should not be over-used/used 'for the sake of it' – the graphic should ideally add clarify



Our targets for ticketless travel	
September 2014 to September 2015	2.8%
September 2015 to September 2016	2.6%
September 2016 to September 2017	2.5%
September 2017 to September 2018	2.5%
September 2018 to September 2019	2.5%
September 2019 to September 2020	2.5%
September 2020 to September 2021	2.5%

GTR scales more proportionate. Though communication of small changes needless



C2C scales don't make sense/distort

Summary and Conclusions



Experiences of travelling with East Midlands Trains satisfactory and desired improvements believed to be realistic by passengers

- Overall, passengers are satisfied with the East Midlands Trains service and are not displeased that the operator may be granted a direct award for the next two years
- Areas of frustration with East Midlands Trains are consistent with the railway network in general and other train operating companies
 - For example, overcrowding, high cost to travel and disruption to services
 - The environment at the station is also an area of dissatisfaction for EMT passengers

- Given that EMT passengers are, on the whole, satisfied with the service that they receive, it is perhaps no surprise that desired improvements are broad and not focussed on a particular area
- Moreover, passengers believe that many of the improvements they desire are realistic for East Midlands Trains to achieve in the proposed two-year franchise

<i>Area</i>	<i>Improvement</i>
	<ul style="list-style-type: none">Straightforward application of delay repayment and publicity of the schemeNo price rises (particularly on standard & season tickets)Clearer communication of ticket options and fares
	<ul style="list-style-type: none">More carriages on existing trains at peak hoursBetter communication about delays in advance of arrival at the station e.g. through Apps, push notifications, text messages
	<ul style="list-style-type: none">Free, working Wi-Fi at the stationMore, working ticket machines at the station
	<ul style="list-style-type: none">Free, working Wi-Fi on-board the trainCleaner carriages and toilets on board the train
	<ul style="list-style-type: none">Better provision of other modes of transport in planned disruption
	<ul style="list-style-type: none">More staff at the station, particularly for assistance and security

Passengers reluctant to see another operator in place of EMT, but question the motives of a short-term contract



- Any improvements not achievable by East Midlands Trains should be the focus of the next franchise from October 2017
- Longer term improvements are, again, fairly broad, but may require significant investment such as new rolling stock and development of stations



- Prior to the research no one knew that the East Midlands franchise was up for renewal
- And although passengers would be 'sad' to see EMT go, news of the direct award received mixed reactions
 - Some felt it was an opportunity for EMT to prove they are suitable to continue with the contract on the long-term future
 - Whereas others felt that EMT would put little effort into improving the service given that they may not be incumbent in a couple of years



Contact Details



ISABEL HOPKINS

Director

Isabel.hopkins@illumina.com
0207 909 0935

ADAM BLOWER

Research Manager

adam.blower@illumina.com
0207 909 0469

ADDRESS DETAILS

Illumina, 183-203 Eversholt Street, London, NW1 1BU
020 7909 0929

www.illumina-global.com