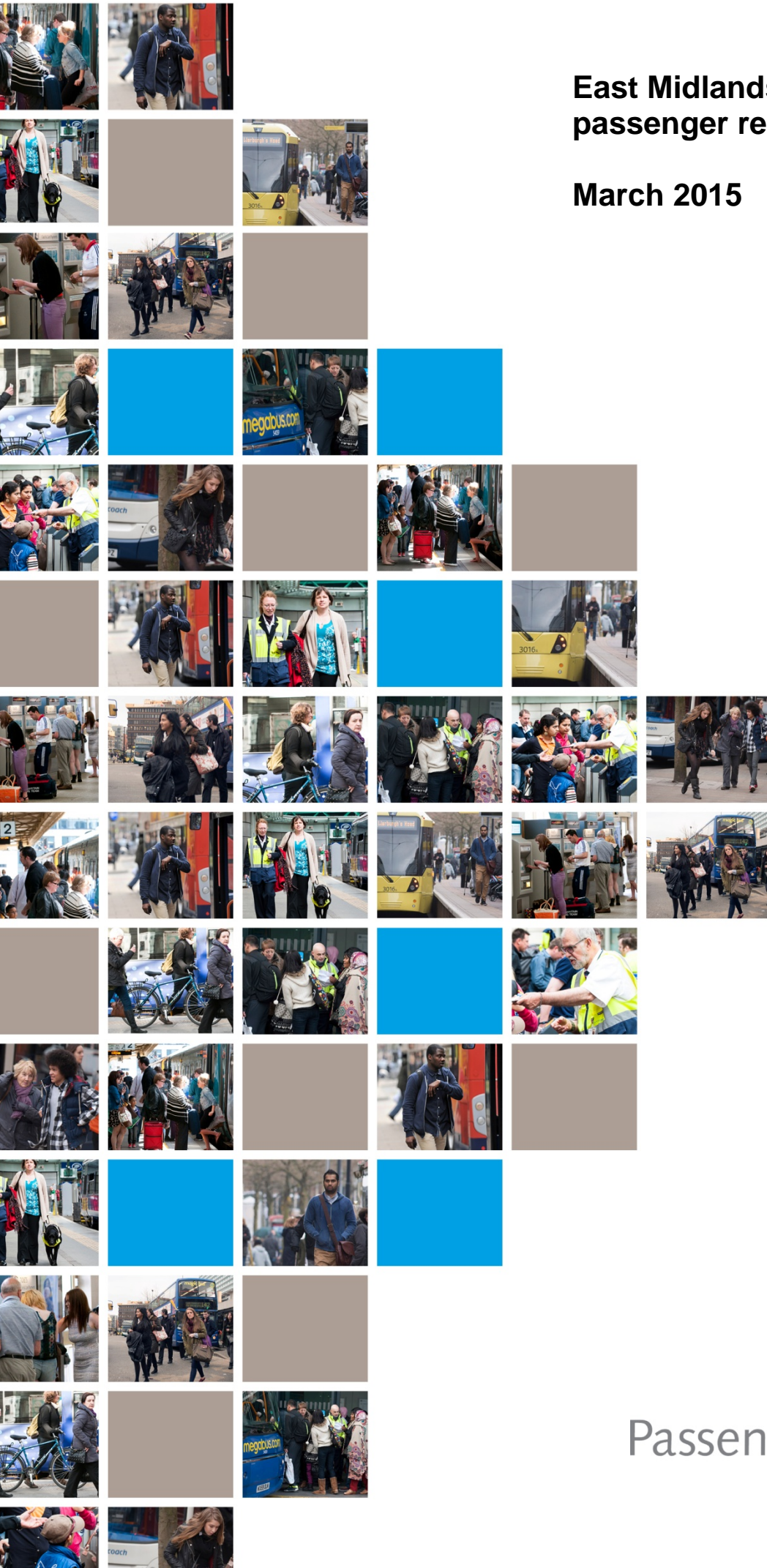


East Midlands rail franchise passenger research report

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	Most desired short-term improvements
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.

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