

East Midlands rail franchise - passenger research



Prepared for Transport Focus

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Background, objectives and research method

Background at May 2017

The new East Midlands (EMT) rail franchise will be awarded in 2018

The current East Midlands franchise is comprised of East Midlands trains and the former Midland Mainline and Central Trains franchises. In June 2007 the new East Midlands franchise was awarded to Stagecoach. The Department for Transport (DfT) recently announced that the franchise held by Stagecoach would be extended until November 2018 when a new bidding process will take place. Arriva, FirstGroup/Trenitalia (a joint venture) and Stagecoach have been shortlisted to bid.

The backdrop to the new franchise process is one of significant change

There are plans to electrify the Midland Main Line that runs from London St Pancras through Derby, Leicester, Nottingham and Sheffield. According to East Midlands Councils, electrifying the line would provide the following benefits:

- Reduce journey times between London and Sheffield by 13-14 minutes and reduce journey times further down the line to Derby, Leicester and Nottingham
- Lead to a lower cost railway and support the wider objectives of economic growth in the East Midlands

In addition, customer expectations are rising and they expect a higher standard of service across all aspects of their East Midlands Trains journey. As part of this, there is significant interest in regenerating out of date rolling stock and dilapidated rail infrastructure.

Transport Focus

Transport Focus is the independent watchdog that represents the interests of Britain's rail passengers. Transport Focus is engaged in influencing all franchising competitions, specifically in terms of setting out passengers' needs in any new contract award. With this in mind, for any new rail service on the East Midlands Network, decisions need to be made about how best to meet the needs of various passenger groups on a series of key service elements.

- Previous research by Transport Focus highlights overall satisfaction, with the service outperforming other regional franchises. At the same time, passengers on the Midland-London route are more satisfied than passengers on the regional lines
- Gaining better value for money was also identified as the top priority for improvement for EMT customers.

The network and its routes

Regional Services

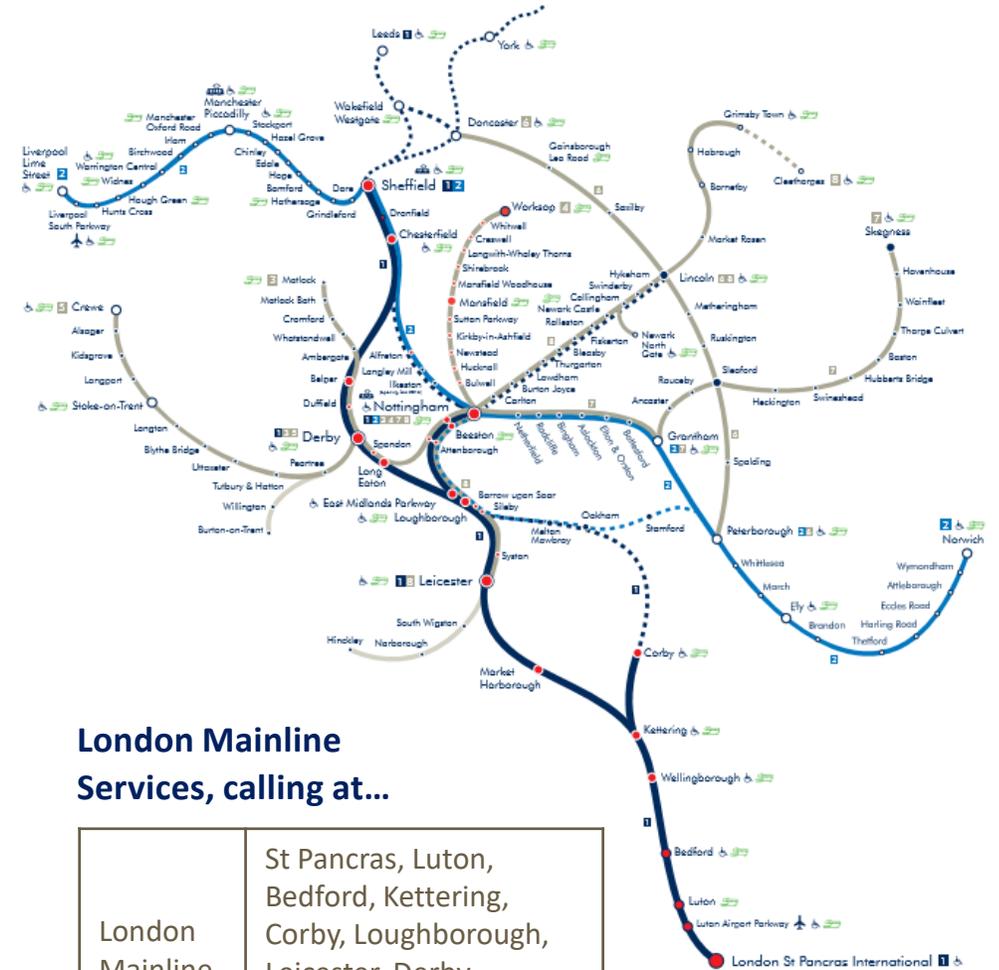
Route	Via
Nottingham to Mansfield Woodhouse/Worksop	Hucknall, Mansfield
Derby to Crewe	Utttoxeter, Stoke-on-Trent
Nottingham to Matlock	Derby, Belper, Cromford
Newark North Gate to Cleethorpes	Lincoln Central, Grimsby Town
Peterborough to Doncaster	Sleaford, Lincoln Central
Nottingham to Skegness	Bingham, Sleaford, Boston
Leicester to Lincoln Central	Leicester, Loughborough, Newark

Liverpool to Norwich

Liverpool to Norwich/Nottingham	Manchester, Sheffield, Nottingham and Peterborough
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Key challenges to new franchise specification:

- Diverse area of rural villages, towns and important urban centres, as well as being a key artery into London
- Service must meet needs of a number of different markets, some of whose interests may not be aligned
- Different passengers having different needs. E.G with regard to rolling stock and service patterns
- Customers' expectations are rising and they expect a higher standard of service across all aspects of their EMT journey.



London Mainline Services, calling at...

London Mainline	St Pancras, Luton, Bedford, Kettering, Corby, Loughborough, Leicester, Derby, Nottingham, Sheffield
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Research objectives

Overall aim: Insight is required on what passengers want from a new franchise

In order to fulfil this aim, a full exploration of the journey experiences and aspirations of rail passengers is needed

A: Pre-Journey experiences: logistics, planning, ticketing, accessing the network

Existing service provision	Service frequency	Time-tables	Reaction to proposed changes
Station demands	Inter and modal change	Car parking / facilities for cyclists	Regional station demands
Accessibility	Accessing the railway	Specific issues affecting the disabled	Required improvements
Planning journeys	Systems, range of information	Particular needs of leisure/business/commuter/frequent/infrequent	
Ticketing/pricing	Commuter/Leisure & ticket/fares for commuting patterns	Business: needs and experiences	

B: On-board experience: seating, comfort, using time productively/enjoyably, personal security, role of staff, service disruption

Design of rolling stock	Explore preferences based on needs	Consider new and refurbished stock	
On-train comfort	Seating comfort	Cleanliness and toilets	On-board catering
Getting a seat	Reasonable expectation	Standards required for seating where a seat is unavailable	
Able to work/relax	Consider all user needs: leisure/business/commuter	Luggage storage	Layout and ability to chat/relax/work
Role of staff	How many/where/when	Terms of engagement	Reasonable expectation
Service disruption	Information/communication needs (particularly commuters)	Action required during disruption	Views on replacement rail services

C: Objectives outside of the journey experience:

Delivering a high quality customer experience: what is missing; what needs improving	Performance: what is expected/required, information to be made available, reasonable compensation	Communication: correspondence, helplines, complaint resolution, wrong ticket scenario, availability	Engagement with TOCs: consultation processes	Disabled travellers: understand any specific issues affecting them	Network synergy
					Network Route

Recruitment criteria: focus groups across the network

Stoke (mini group)

- commuter frequent

Mansfield (mini group)

- commuter frequent

Derby (full groups)

- leisure infrequent
- commuter frequent

Leicester (full groups)

- commuter infrequent
- business frequent

Kettering (mini group)

- business frequent

10 x 1 hour depth interviews with disabled passengers carried out in a mix of the locations shown

*Six supplementary in depth interviews were carried out in Skegness because initial recruitment criteria was not originally met in the mini-group setting



Sheffield (full groups)

- business frequent
- leisure infrequent

Lincoln (full groups)

- commuter frequent
- leisure frequent

Skegness (mini group)*

- mixed

Nottingham (full groups)

- commuter frequent
- leisure frequent

Peterborough (full groups)

- business infrequent
- leisure frequent

Bedford (mini group)

- commuter frequent



Executive Summary

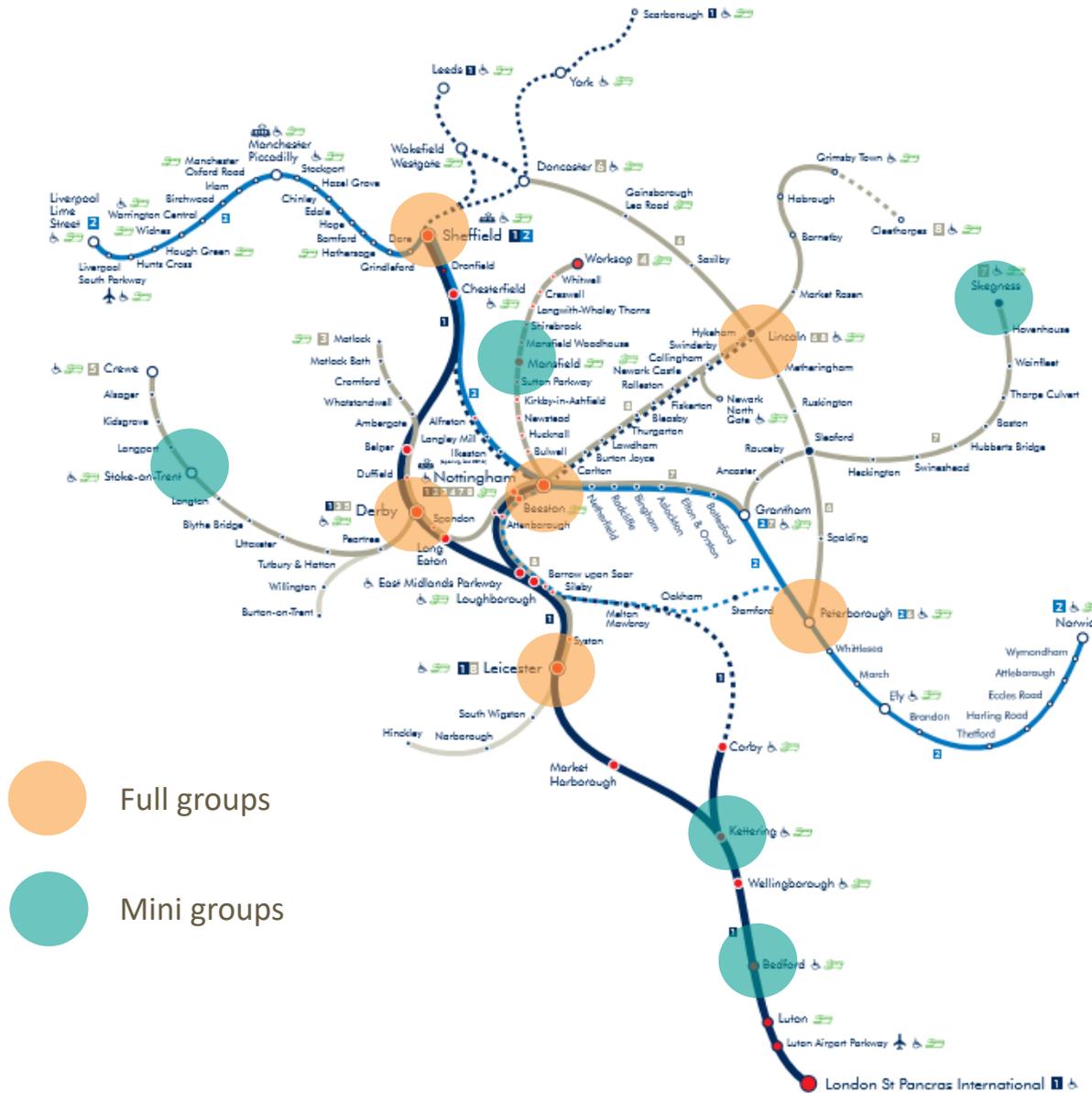
Headlines

- Overall, East Midlands Trains performs well on core passenger requirements, especially with regard to punctuality and reliability
- Taken in the round, EMT is typically marked as '7 or 8 out of 10'
 - It holds up well in comparison to other modes of transport where there are alternatives for passengers
 - And is seen as providing a better service than many other train companies
 - There is a degree of affinity with the EMT brand
- However, EMT falls short of offering the same kind of customer experience as market leading TOCs
- In addition, service provision is highly variable, with there being stark contrast between the 'North – South' mainline route when compared to 'East – West' local services
- Thus, while EMT rarely profoundly disappoints, it also struggles to 'excite and delight'.
- To some extent, passengers' views of EMT are a product of conditioning: they see EMT as operating in a 'mid-market' space, are used to a 'middle of the road' experience and expect more of the same
- People feel that it offers value for money. However absence of some aspects of the service do impinge on these feelings of value, such as lack of seating and absence/lack of visibility of on-board staff members
- That said, there is still substantial room for improvement in some areas
- For the local East - West routes there are some quite fundamental service shortfalls:
 - Limited service frequency
 - Quality of rolling stock
 - And wider issues of overcrowding
- These issues also apply, albeit to a lesser extent, to the North- South mainline, but here the need (and the opportunity) is to raise the bar to match the market leaders.



Regional focus

Route map and locations covered



Reflecting the diversity of the franchise, there are significant regional differences in services

- Midland Mainline running North to South is viewed differently from regional lines running East to West

There are common themes across all locations, including:

- Trains are generally punctual and reliable
- Regional rolling stock out of date
- A more frequent service needed from rural stations
- Unprepared for ad-hoc busy times (e.g. events).

Each location had specific issues that are highlighted on the following slides

Regional focus: Central East Midlands



Nottingham: commuter, leisure



Leicester: commuter, business



Derby: commuter, leisure



Mansfield: commuter

Journey types

Commuter travel:

- Regular commuting trips to London
- Commuting to other urban areas such as Sheffield, Nottingham

Purposes for leisure trips:

- Visiting nearby towns and cities for shopping trips, nights out and seeing friends
- Some travelling for ad-hoc events (e.g. football matches).

Business travel:

- Business trips to urban areas across the EMT including London

Why choose the train?

- **Price:** typically better value over short distances than other modes of transport - biggest factor in decision making in Mansfield for commuters
- **Reliable, frequent and punctual** service - few if any problems with delays
- **Speed** of train seen as superior to driving
- **Less stressful** than driving
- Ease of use, trains take you into the city centre providing access to hotels/clients
- Able to work on train
- Able to relax/socialise on-board.

“I choose the trains because it's a faster way, cheaper and no traffic just going smooth to work, wherever, you don't worry about nothing.”

Mansfield, Leisure Frequent



“I live with my girlfriend in Long Eaton, I'm an accountant. I use it three or four times a week just for Long Eaton to Nottingham for work, so that will be a regular thing and I'll use it for leisure because I go and watch the football away.”

Derby, Frequent Commuter

Regional focus: Central East Midlands

Key issues

- Seen as expensive on peak longer distances i.e. to London and people expect better facilities provided as a result
- Journeys on regional lines are less frequent i.e. to Lincoln
- Leicester station is not regarded very highly in regard to accessibility, facilities i.e. cafes/restaurants/shops, platform seating and journey information provided
- Confusion in Mansfield as to whether passengers should purchase tickets before travel, resulted in confrontations with ‘payment enforcers’, who are seen as heavy handed and unfair, leaving passengers offended and uncomfortable
- Regional ‘white trains’ noticed to be more roomy, comfortable than ‘blue trains’.

“I get a weekly ticket, every week and the one day I happened in the morning to get a lift in and so I was commuting back from Nottingham to Mansfield, a friend and I used to buy a weekly ticket, every week, on the train. I then got fined but I had no pre-warning that I was going to have to buy a ticket from the station.”
Mansfield, Leisure Frequent

Improvement priorities?

- Improving general standard of facilities on trains: plug sockets, Wi-Fi
- Staff members: more visible, friendly and helpful
- Leicester and Loughborough are hard to access, better facilities for parking and bus services are required
- In addition, more information screens provided at Leicester
- More on-board announcements around disruptions
- A higher quality of service on the Mainline (catering, cleanliness, clean and functioning toilets etc).



“I've never really noticed a massive change within a carriage. You know, the seats all look the same, tables look the same, there's no real design input going into there and actually when it comes to it, people like myself, I would say most of the people who are on a train are commuting to work nowadays. They want an office, they want somewhere where they can sit and get their tablets out, laptops out and blast away to their heart's content on their computer while they're going to work.”
Leicester, Commuter

Regional focus: Lincolnshire



Lincoln: commuter, leisure



Skegness: mixed

Journey types

Commuter travel:

- Many travelling to and from Lincoln to Nottingham, Leicester, Sheffield, and surrounding rural stations

Purposes for leisure trips:

- Football matches, visiting family and friends, hospital and trips to the coast (Skegness and Cleethorpes).

Business travel:

- Travel to London
- Travel to other urban centres to the west of Lincoln.

“Oh the skeggy line is great. It’s all part of a day out up there and you can go and take the kids and that. They count the cows on the way up there.”

Lincoln, leisure frequent

Why choose the train?

- **Reliable:** Leisure users report the train service to be reliable and on time
- **Lack of local alternatives:** passengers describe the local area as sparse and lacking in infrastructure, this includes roads that connect towns and villages
- **Lack of alternative public transport:** the bus service is seen as very poor in Lincolnshire, with many passengers laughing at the thought of taking the bus to make their journeys
- **Commuting long distances:** many passengers commute from, or to, cities and towns on the EMT network (Sheffield, Nottingham, Leicester). Using the rail network is seen as the quickest and most convenient mode to make these journeys due to direct links.



Regional focus: Lincolnshire

Key issues

- Commuters from this region of the network report the most amount of ‘**basic problems**’
- **Overcrowding** is experienced at peak times and in what are perceived to be predictably busy events (e.g. football matches, holiday times, the races etc.)
- Signalling **problems** at **Sleaford**
- Problems with **on-board space**: cramped feel, limited space for luggage
- **Safety**: many report being in situations whereby they feel unsafe and require staff assistance, but staff were unwilling or unavailable
- **Local infrastructure** described as ‘rural’ and in the middle of nowhere. Commuters recognise that the transport network in the area in general is in need of improved connectivity
- **Seasonal issues in Skegness**: the summer season can be difficult for local travellers who are using the network to commute or to visit family.

- This is because holiday makers are using trains that become quickly overcrowded due to there only being one carriage
- This also becomes an issue on the roads when getting to the station. Passengers can be commuting into Skegness from surrounding villages and towns, and when tourist season is at its peak, passengers can miss trains due to traffic
- Locals from Skegness report delays at Boston when travelling from Skegness West across the network
- Overcrowding between Skegness and Sleaford in morning rush hour
- Skegness station and car park poorly lit, barren and reports of intimidating groups that ‘loiter’

Improvement priorities?

- An improvement to the line between Nottingham and Lincoln
- Reliability and punctuality at peak times.



- Overcrowding on board the train
- Luggage space
- More coaches
- More frequent service

“Obviously the summer is a really busy time and you get lots of holiday makers coming from all sorts of places. The roads then get packed and it’s hard to get to the stations, and then you’ve got to squeeze me and my kids on to the train at the station to go to Derby to see my family.”
Skegness, leisure frequent

Regional focus: South East Midlands



Peterborough: business, leisure



Kettering: commuter



Bedford: commuter

Journey types

Commuter travel:

- The mainline route down to London, other mainline commuting journeys include: Kettering to Leicester, Bedford to Market Harborough

Purposes for leisure trips:

- Visiting London for day trips: theatre, football, shopping
- Across the network visiting friends/family e.g. Peterborough to Bedford, Kettering to Leicester/Sheffield

Business travel:

- Business trips to London and other major urban areas across the network e.g. Nottingham, Derby, Sheffield, Leicester.

Why choose the train?

- **Reliable and frequent:** regular, punctual services with few, if any, disruptions. Volume/frequency of services on the mainline is better than for other lines
- **Fast/direct:** a quick service compared to other modes of transport, especially cars. Compares well with Thameslink services (fewer stops)
- **Value:** cheaper to commute via train than car, as parking is seen as very expensive. Also compares well on cost to other train companies and local buses
- **Relaxing:** less stressful/tiring than driving at peak times
- **Better experience than Thameslink:** Some East Midlands Trains London services offer better facilities than Thameslink trains i.e. comfier seats, plugs/paid-for Wi-Fi/ and a 'smoother experience' - though some awareness that Thameslink had begun to update stock.



Regional focus: Bedford and Kettering

Key issues

- **Crowding:** a key issue at certain points of the day. This is not just for those who travel to London, but also those who travel to other destinations across the region
- **On-board comfort:** there is little personal space, seats are not that comfortable, additional issues with luggage, pushchairs, bicycle storage
- **Cleanliness:** trains are particularly messy in the evening and over the weekend.
- **On board communication:** number of occasions when there is no communication for disruptions i.e. time of delay, expected arrival time
- **Security:** some people feel unsafe in the evening or at the weekend on the trains and stations when people have been drinking and are behaving anti-socially
- **Lack of staff* at station and on trains:** people would prefer to see more staff at stations and on trains particularly late at night.

- **Confusing fares:** array of fares on offer, for less frequent journeys can be confusing to understand

Improvement priorities?

- Extra carriages at peak times
- Roomier, more spacious carriages
- Facilities: better Wi-Fi signal for checking Facebook, emails, more charging points to charge
- Security at certain times e.g. match days
- Loyalty card/discount card for regular users
- More flexible family tickets for big families which offer value for using East Midlands
- Opening up 1st class carriages during peak times when crowding
- More cleaning ‘sweeps’ and bins to improve the look and feel of the carriages
- More visible staff at stations and on-board to improve feelings of security and to provide help and support
- Passengers want reassurances to their personal security through staff presence
- Improved communication during times of disruption.



“I catch a train at 5.05 and its like sardines. It feels like they put as many people on the trains as they possibly can.”
Bedford, commuter frequent

“I’m spending £130 at least on tickets and when I add that up to a month, it’s at least 600. And then I have to pay for Wi-Fi. I think that’s really rubbish.”
Bedford, Frequent Commuter

*‘Lack of staff’ is a perception that passengers have. It may be that there are staff at stations and on trains but they are not visible to passengers

Regional focus: Peterborough

Key issues

- Little difference between Liverpool-Norwich line and Regional services to Lincoln: passengers using both lines raised the same issues and view the Liverpool-Norwich rolling stock as out of date in the same way that regional passengers do. Some that do travel East towards Norwich use Abellio Anglia due to superior rolling stock at the same price
- Higher quality amenities: those travelling from Peterborough were accustomed to higher quality on-board services and amenities when using other comparable train services (e.g. Virgin East Coast)
- Amenities expected: plug sockets, free Wi-Fi, on-board food bar, charging points for phones
- Seating: passengers often find a seat when making journeys, and think the comfort of seating is satisfactory. Nonetheless, they recognise that they are old and in need of modernising and cleaning.

- Staff: lack of visible staff to assist on platforms
- Passengers want staff to be on hand to assist with any questions, directions or help with luggage etc.
- Security: those travelling on the Liverpool-Norwich line reported some incidences of threatening behaviour from 'drunks' at night
- Ticketing: paper tickets seen as a nuisance and outdated, modern approach of using a smart phone preferred by most

Improvement priorities?

- Updated and modernised rolling stock
- Facilities: better Wi-Fi signal for checking Facebook, emails, more charging points to charge
- New, clean seating with a modern design
- A wider service provision to smaller towns and rural areas that are currently not serviced by a train station
- Universal electronic ticketing using smart phone.



"I normally get that [Abellio Anglia] instead because it doesn't make any difference on price but it's just they're nicer trains. I would say unless I have to go with East Midlands then I won't out of choice."
Peterborough, leisure frequent

Regional focus: South Yorkshire and Staffordshire



Sheffield: business, leisure



Stoke on Trent: commuter

Journey types

Purposes for leisure trips:

- Visit urban centres such as Nottingham, Manchester and Derby for shopping and restaurant trips, as well as to visit family
- Use Liverpool-Norwich line to visit areas in the peak district
- Local trips to Dore, Dronfield and Chesterfield

Business travel:

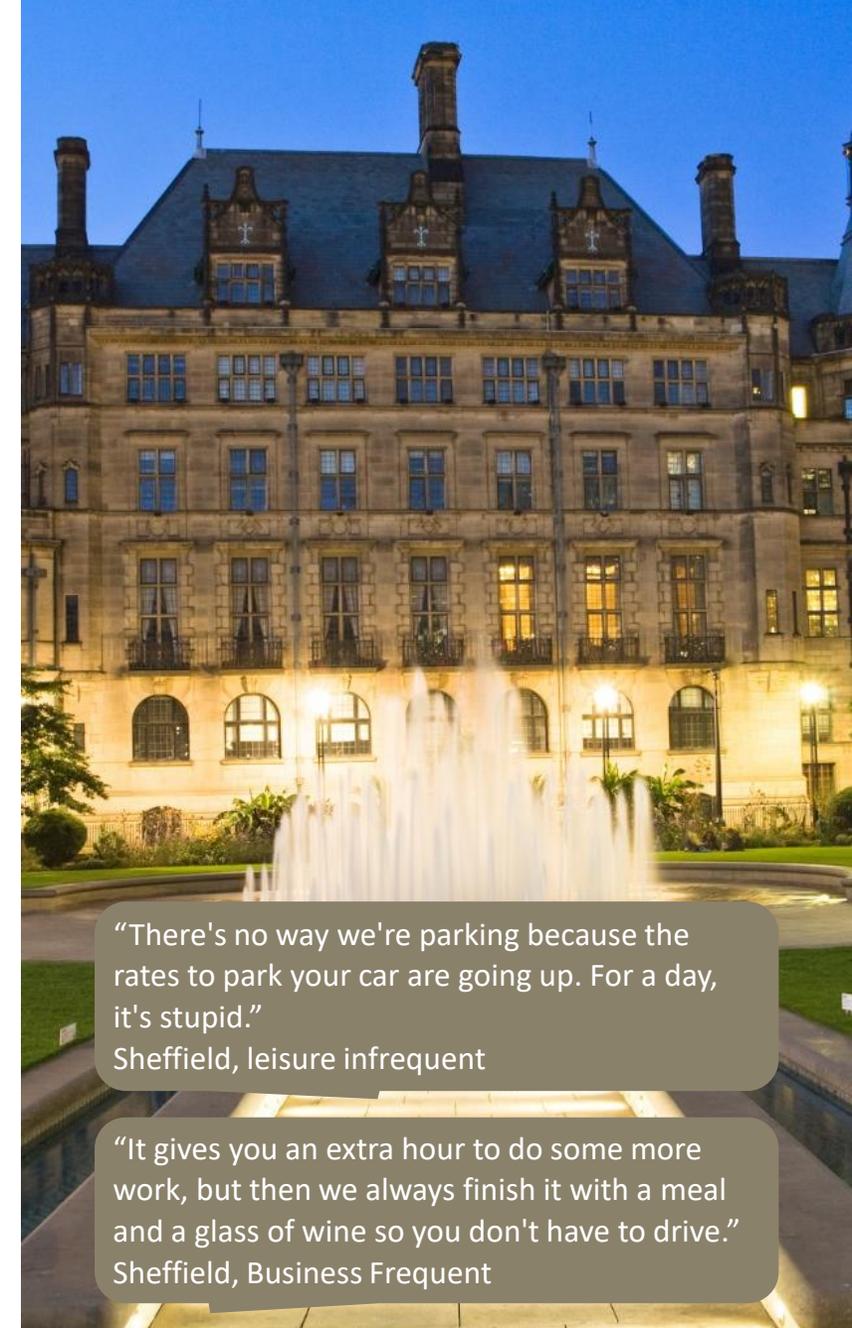
- Many travelling to Nottingham, Derby, Chesterfield, Leicester for frequent business trips
- Some travelling first class.

Commuter travel:

- Commuters at Stoke-on-Trent are commuting to Crewe and Stoke from smaller surrounding areas (e.g. Longton)

Why choose the train?

- **Reliable:** the reliability and punctuality of the service is its main selling point
- **Quick:** time taken to get to destination quicker on the train than by car
- **Own space:** many enjoy space on the train to read, work and socialise
- **Able to drink:** many travellers saw the train as ideal for social occasions as they could drink alcohol with friends and family
- **Cost effective compared to driving:** calculating petrol and parking, train fares are seen as equal to that of driving for shorter trips
- **Lack of alternative public transport:** this is particularly the case in some rural/suburban areas (e.g. Dore).



“There's no way we're parking because the rates to park your car are going up. For a day, it's stupid.”

Sheffield, leisure infrequent

“It gives you an extra hour to do some more work, but then we always finish it with a meal and a glass of wine so you don't have to drive.”

Sheffield, Business Frequent

Regional focus: South Yorkshire and Staffordshire

Key issues

- EMT is reliable and punctual according to all users
- ‘Poor relation’ – regional services’ rolling stock old-fashioned in comparison to other services (e.g. Virgin)
- Amongst local leisure users, there is a sense of endearment to EMT being ‘a bit shabby’
- Still, commuters do not expect a high quality service for short journeys and feel regional services are meeting their expectations
- There is a lack of EMT staff presence at the stations and on-board the train
- Passengers want to see staff on trains to answer queries and offer security
- Smaller stations can be lacking in amenities and safety features (e.g. lighting, CCTV)
- Business users expect a higher quality of service and see EMT as inadequate, particularly those travelling in first class.

- Commuter services typically run once an hour from regional stations- not seen as frequent enough
- At Stoke, trains only become overcrowded during local events (e.g. football matches)
- Sheffield station can be overcrowded at peak times, leading some passengers to get on the train at stations further down the line (e.g. Chesterfield)

Improvement priorities?

- A more frequent service
- Upgrade rolling stock
- Improve smaller stations
- Improve quality and service aspects of travel (e.g. staff, catering and first class perks).



“It’s the hospitality industry at the end of the day, the trains, so they need to make sure that they are looking after the customer in that sense.”
Sheffield, business frequent

“I wouldn’t get off there [Longport]. I’d be terrified. It’s unmanned isn’t it?! There’s nothing there! Everything’s shut down there, there’s no light, no people...”
Stoke, commuter frequent



Choice of transport mode

East Midlands Trains' reliability makes it a popular modal choice

Reliability

- EMT more reliable than driving (of particular importance to commuters and business travellers)
- Commuters feel in habitual routine that they can rely on

"The train comes one minute late everyday, but I like it"
Stoke, commuter frequent.

- Of slightly less importance for leisure travellers, but still aware that the train is *nearly always on time*



Cost effective for short journeys

- Cost effective compared with driving: after the cost of petrol and parking, passengers concluded that there was no substantial difference in cost between train and car travel, and some passengers added insurance and buying a car into this calculation
- For longer journeys, price is more contentious

Enjoyable

- Leisure travellers enjoy scenic routes
- Use train when drinking alcohol

Speed

- Tied in closely with reliability: trains perceived as quicker than driving because of no traffic or delays
- Regional routes seen as slow compared to Midland Mainline

Used beyond necessity

- Some commuters use EMT at the weekend for leisure
- EMT used for a variety of purposes for most of our different journey types (commuter/business/leisure)



"I'm a teacher and I work in Leicester so I commute on a daily basis. I normally take the half-past-six in the morning train to Leicester or the quarter-past-seven, depending the amount of work I've got to do. Normally I would come back quarter-to-four, the good thing is that the train is on a regular basis, so every hour so I've got trains up to half-past-ten! I really enjoy the train."
Nottingham, Commuter Frequent

"I'm working in Newstead so if I want to choose the bus, the journey would take, I'm guessing 50/55 minutes which on the train is 14/15. I'm saving time. That's a big saving, I could sleep longer."
Mansfield, Leisure Frequent

Train travel has distinct advantages over alternative modes of transport



Driving (& often parking) seen as:

- Expensive compared to rail travel (although not for group travel)
- Time-consuming due to poor infrastructure of local roads
- Difficult on congested roads
- Stressful due to the above issues.

“I do drive but for uni I like to take the train, I choose to take the train instead of driving, mainly for traffic purposes in the mornings.”
Nottingham, Commuter Frequent

Local buses either unavailable or slow

- Seen as suitable for short local journeys, especially if not time urgent, but where there is a train alternative, seen as...
- Slower
- Less predictable
- More limited comfort and amenity.

All the little stations that my kids' friends live at, it's a lot quicker and easier than them using the bus.”
Sheffield, Leisure Frequent

For longer leisure trips, the coach is seldom the first choice

- Coach often considerably **cheaper** than rail
- But slower, more unpredictable and seldom an enjoyable journey experience.

“I think buses are actually worse than cars for traffic because they have to keep regularly stopping, it's crowded it's so packed and claustrophobic.”
Nottingham, Commuter Frequent



Relationship with East Midlands Trains

Regional passengers have an image of East Midlands Trains as old fashioned but reliable

Passengers do not think that the image and identity of EMT is constructed by its branding or communications

Passengers claim the image and identity of EMT is constructed by:

- Design of rolling stock
- Level of maintenance of rolling stock
- Punctuality and reliability of service
- Many EMT passengers have fond feelings towards East Midlands Trains as a service that is, whilst somewhat ‘shabby’, also ‘solid’ and part of their community.

The level of trust in East Midlands is therefore quite strong (relative to other franchises)

- Trains are generally on time and expectations are most often met

- Seen as good value for basic journeys
- But, not seen as dynamic and forward looking.

Some passengers feel that East Midlands as an area does not have a strong identity

- Therefore some passengers view EMT as ‘a good local service’ rather than a brand or franchise.

Passengers feel that the current level of relationship is appropriate

- Passengers feel that additional contact would be appropriate for cancellations and delays (e.g. texts if trains are cancelled)
- Some regular users have a desire to have loyalty or reward scheme.

“I think they try to make it as easy as it can be, so that goes through everything so for me it’s booking tickets and the staff.”
Kettering, Business Frequent



East Midlands Trains passengers have an image of the London Mainline as more up to date than the regional trains, but still not on par with Virgin in terms of service and design

On-board experience seen as comfortable and fairly modern

- Temperature control satisfactory
- Seats comfortable and spacious
- Particularly in comparison to Thameslink and other EMT regional services.

Respondents notice the orange branding

- Orange interior somewhat sticks in passengers' minds, with some affection.

It were very orange inside. The upholstery were a bit. It's a bit like Stagecoach buses. To me it almost feels safe. I know it is local but it has that sort of local feel about it. Sheffield, leisure infrequent

Ultimately though, trains can seem dated compared to Virgin

- Exacerbated by a mediocre First Class service and lack of food/drinks bar
- Gives some passengers the impression that EMT mainline service is still understated.

"It's a bit dated really, they've not really changed that much have they? The Virgin Trains are a lot more fresh, aren't they."
Sheffield, business frequent



Customers have very few current points of human contact with East Midlands Trains

	Website	App	Station staff	Train staff	Telephone	Ticket office
Frequency of contact	high	medium	low	low	low	low
Quality of contact	medium	medium	high	high	n/a	Medium

Large proportion of passengers using EMT website and app

- Many familiar with EMT website
- Passengers not solely using Trainline or National Rail websites and apps
- Few problems reported with EMT website.

Passengers often pleasantly surprised by responsiveness to complaints

- EMT prompt with acknowledging and dealing with complaints
- Friendly and reasonable manner of staff reported by passengers.

- Passengers have received what they perceive to be adequate compensation for issues experienced.

Customers expect to see more EMT staff on route

- Lack of visible EMT staff at stations, although at some stations (e.g. Stoke) Virgin staff are in abundance
- Lack of visible staff on-board trains
- Passengers seek out staff for safety reassurance
- Many instances of positive interactions with EMT staff.

Vast majority of customer service experiences received from EMT staff is positive...

“I’d got the kids with me and they were swearing and shouting and obviously had a lot to drink, and there was no members of staff to deal with that, there was nobody that I could call, and there was no buzzer that I could push and say look we’ve got a problem.”
Kettering, business frequent

“I had a letter and then a phone call saying ‘our manager is taking this very seriously’. They sent me two free first class return journeys from Nottingham to London to use within the next 12 months. I got the breakfast trains, I got free cooked breakfasts!”
Nottingham, commuter frequent

“I always find the ticket collectors really nice. If there was an old person trying to get on the train there's always someone there to help them put their bags on. I do feel like most of the people on the trains are generally nice people.”
Peterborough, leisure frequent

Nuances in staff experiences- there are negative experiences, but they are not seen as the norm

Negative experiences

- Some passengers find staff members can be confrontational and unhelpful

“When I'm going through First Class the staff are quite attitudy. I'm saying to them, 'I've got a wrong ticket. I'm willing to pay more for your service', but I just get this aggression, like, "Oh you should've done it from the beginning'”
Bedford, commuter frequent

“[EMT] were really good in saying, 'You are able to claim, go to the website', so when there is a delay that you are on at that time, they have always said, 'You can go and do it'.”
Derby, Frequent Commuter

Inconsistency:

- In the quality of experience with staff members
- In the information obtained from staff members
- Important that staff are in recognisable uniforms, some passengers report that in rush hour staff are not visible amongst the crowds
- Staff not always reliable, aware or considerate when ticket machines are broken.

“When you've got staff with brightly coloured uniforms on, it's massively different. think about uniforms for generic companies, things like EasyJet are bright orange and things like that, when you've got something that stands out, you can see them from a distance.”
Leicester, commuter frequent

“Sometimes you haven't been able to buy a ticket or there's been some issue with your ticket, they don't seem to assume the worst of you straight away and think that you're trying to do so much. I think other ones (train companies) do.”
Mansfield, Frequent Leisure

Positive experiences

- Small gestures of care and assistance go a long way for customers (see above example)
- Staff showing ‘understanding’ and ‘common sense’ when passengers make mistakes is seen as important
- There are many cases where EMT responses to complaints are very good, and passengers remember this as a positive experience as a result

“If I make a mistake and have the wrong ticket, they're not going to be, 'Oh, get off the train now', they're quite understanding. They help you out as much as they can, yes, I would say that.”
Derby, Leisure Infrequent

“I've written to [East Midlands Trains] saying that there's a really good member of staff at say Beeston or Loughborough or somewhere. Really helpful, sold me a cheaper ticket, found a way of communicating something that I wouldn't have been aware of.”
Nottingham, commuter frequent

Very good staff experience

Lucy Lee 2017/05/09 – 13:37



We are on the train at Peterborough ready to go home. A nice female member of staff advised me they would re-route the train so it went into platform one at Spalding as I will have to take the pushchair over the bridge at Spalding. I advised her that wasn't necessary and I would be ok with the bridge at Spalding as my pushchair folds small. All the staff I have experienced have been very customer focused.

Points of Comparison: given how far the franchise stretches, there are many different comparators to East Midlands Trains

Stoke



Derby



Leicester



Sheffield



Lincoln



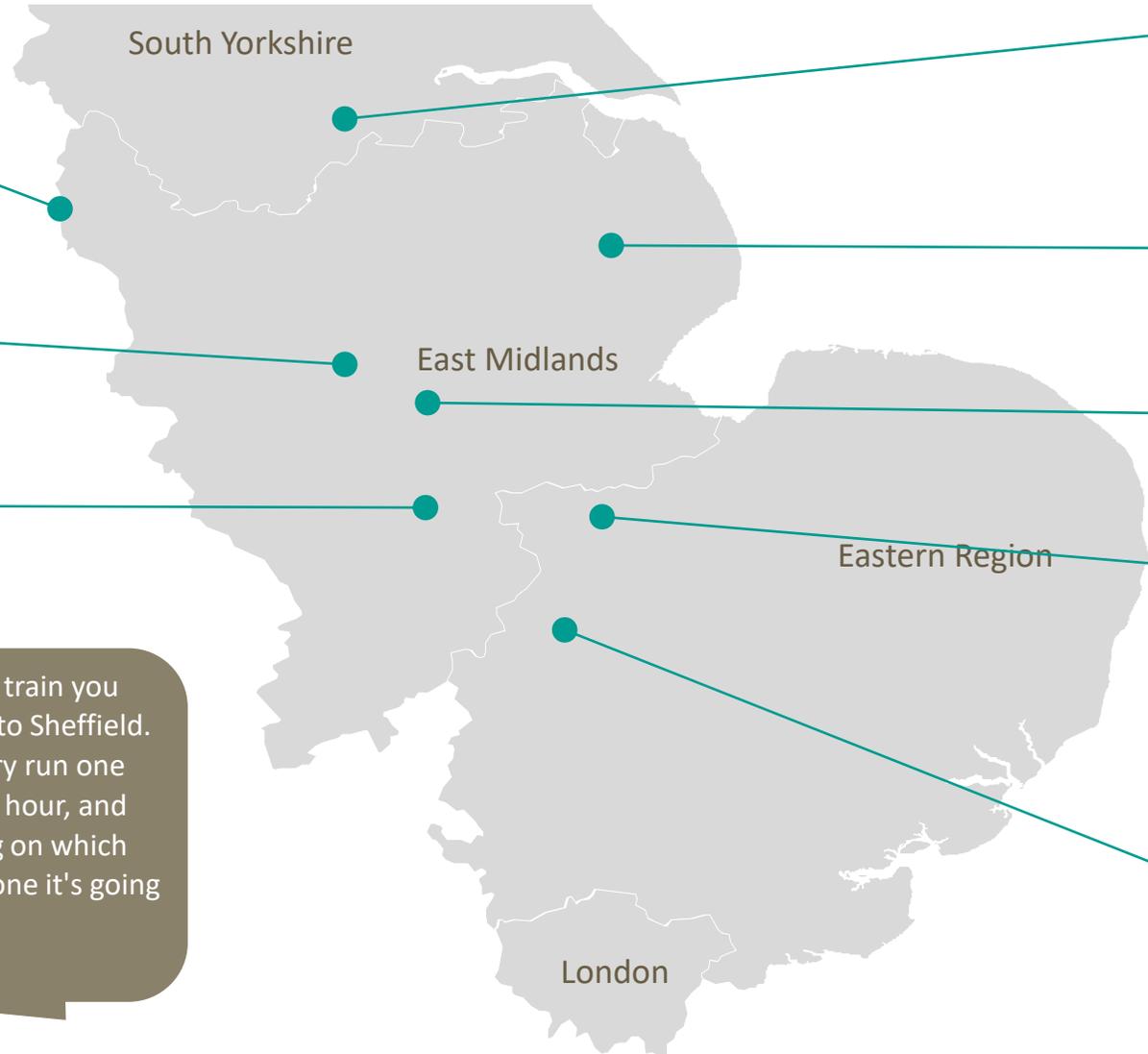
Nottingham



Peterborough



Bedford



“Sometimes you don't even know which train you need to go on, especially if you're going to Sheffield. They go every half an hour; Cross Country run one every hour, East Midlands run one every hour, and they're half hour intervals. So depending on which one you've booked, I don't know which one it's going to be.”
Leicester, commuter frequent

East Midlands Trains compares favourably with other brands in terms of reliability and punctuality, but not in terms of the quality of its rolling stock or service

Many passengers that have a choice of providers insist that the price does not vary much, but the quality of travel does

“I've got off East Midlands, gone on a Virgin train. I've got off an East Midlands, I've got on a CrossCountry, I've got off East Midlands, I've got on a London Midlands. It's the same price whichever but they're very different experiences.”
Stoke, commuter frequent

- East Midlands Trains often seen as delivering the basics well, such as reliability and punctuality
- But seen as below what are perceived as higher class services such as Virgin.

“More often than not, if you're in East Midlands area, it is an East Midlands train, but it's either CrossCountry or East Midlands. CrossCountry, and those, they all sort of merge into one. I think you don't really think of them as individual train companies.”
Leicester, commuter frequent

ThamesLink

EMT London services perform than Thameslink better on:

- Punctuality and reliability
- Train service frequency
- Customer service
- Length of journey

In addition, EMT is typically seen as more modern and cleaner

EMT's facilities and seating are better

But EMT has similar problems with crowding and lack of seating at certain times of the day



Felt to merge into EMT, XC is not distinctive enough

- XC's identity neither remarkable nor memorable.



Virgin has a high standard of punctuality, reliability, service frequency and customer service

Virgin performs better than EMT on:

- Offering a more premium service
- Carriage environment
- Upkeep and cleanliness of rolling stock
- Quality and variety of catering options
- Crowding and lack of seating (on some routes)
- Quality of First Class offer.

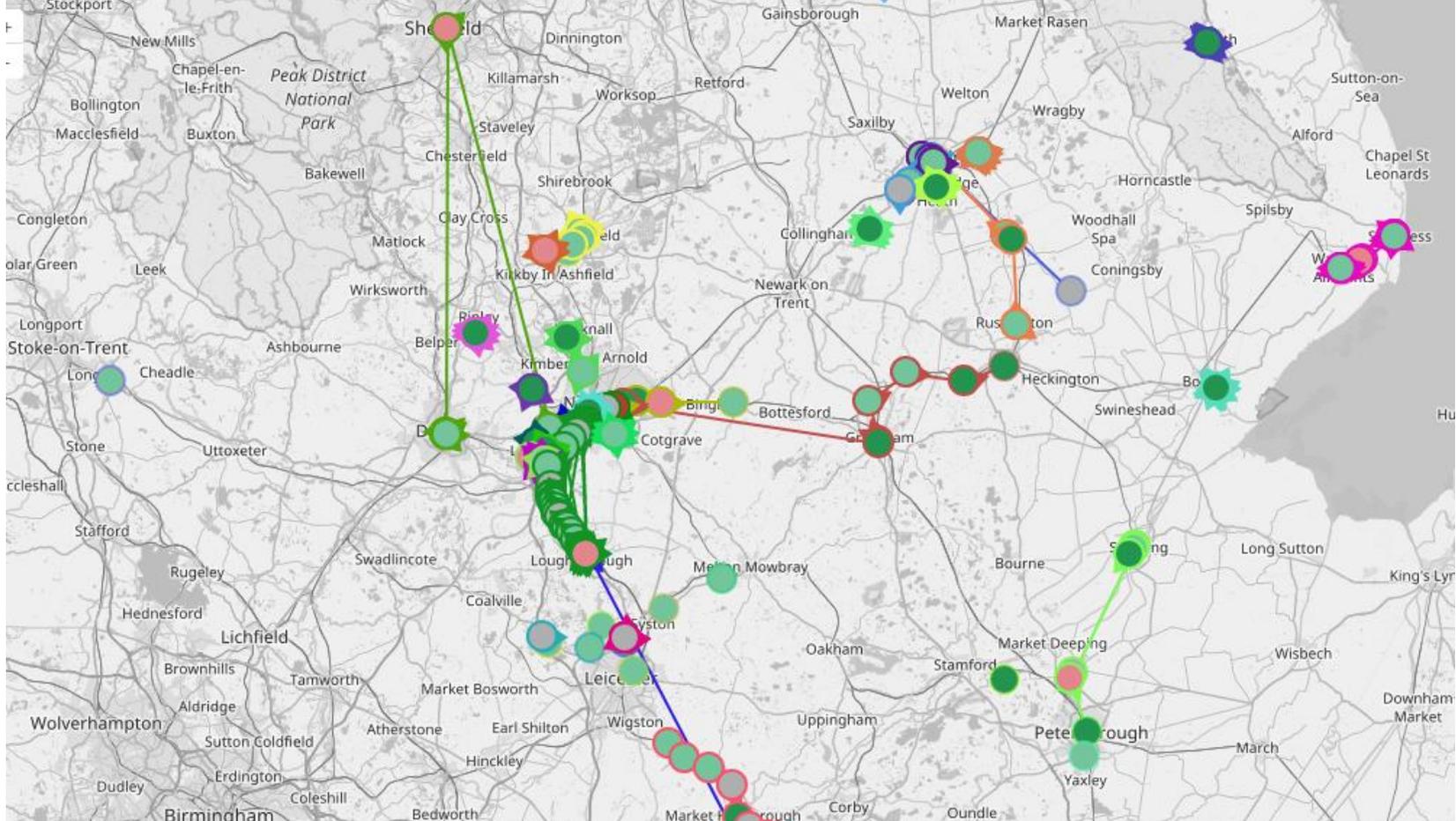
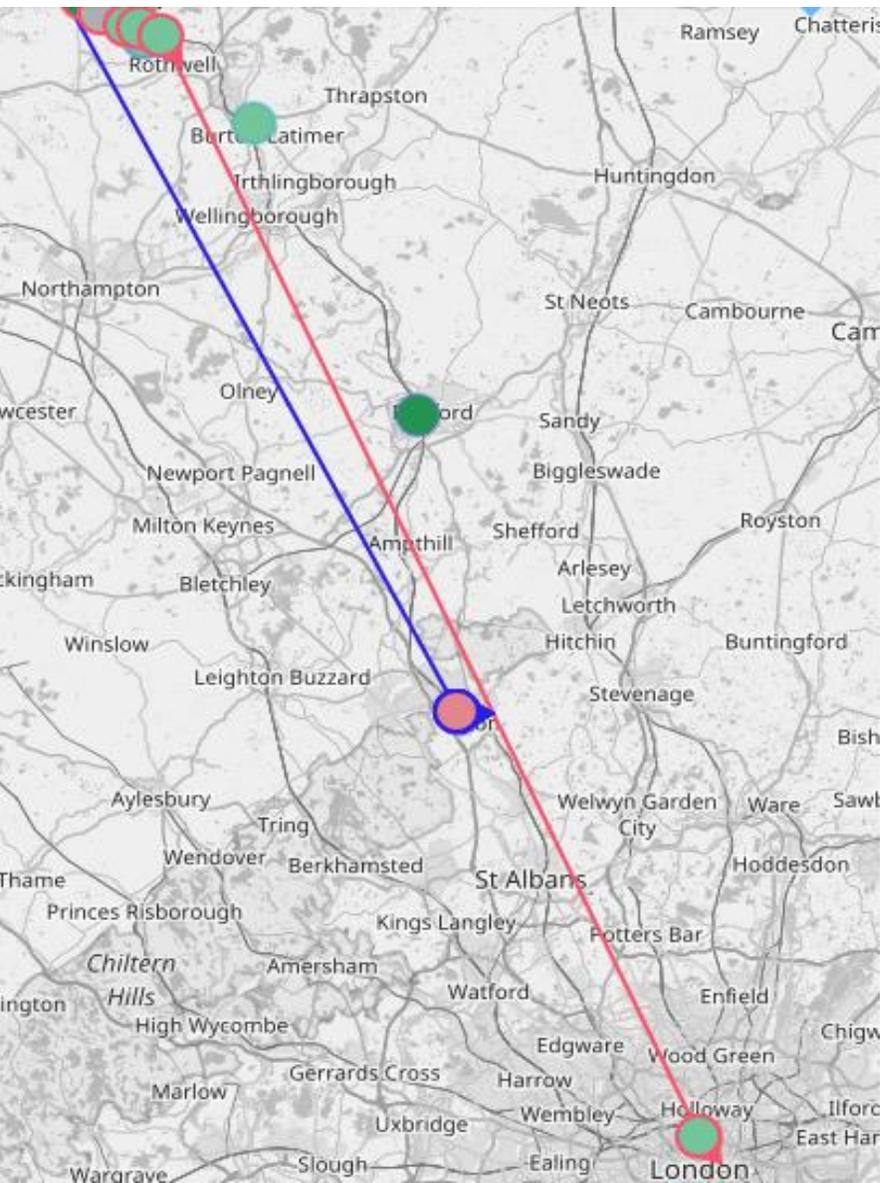


Previous operator (10 years ago), Midland Mainline, is remembered by some for 'going the extra mile' in providing complimentary tea and coffee to all passengers on its London services.



Journey experience

Smartphone app for recording journey experience

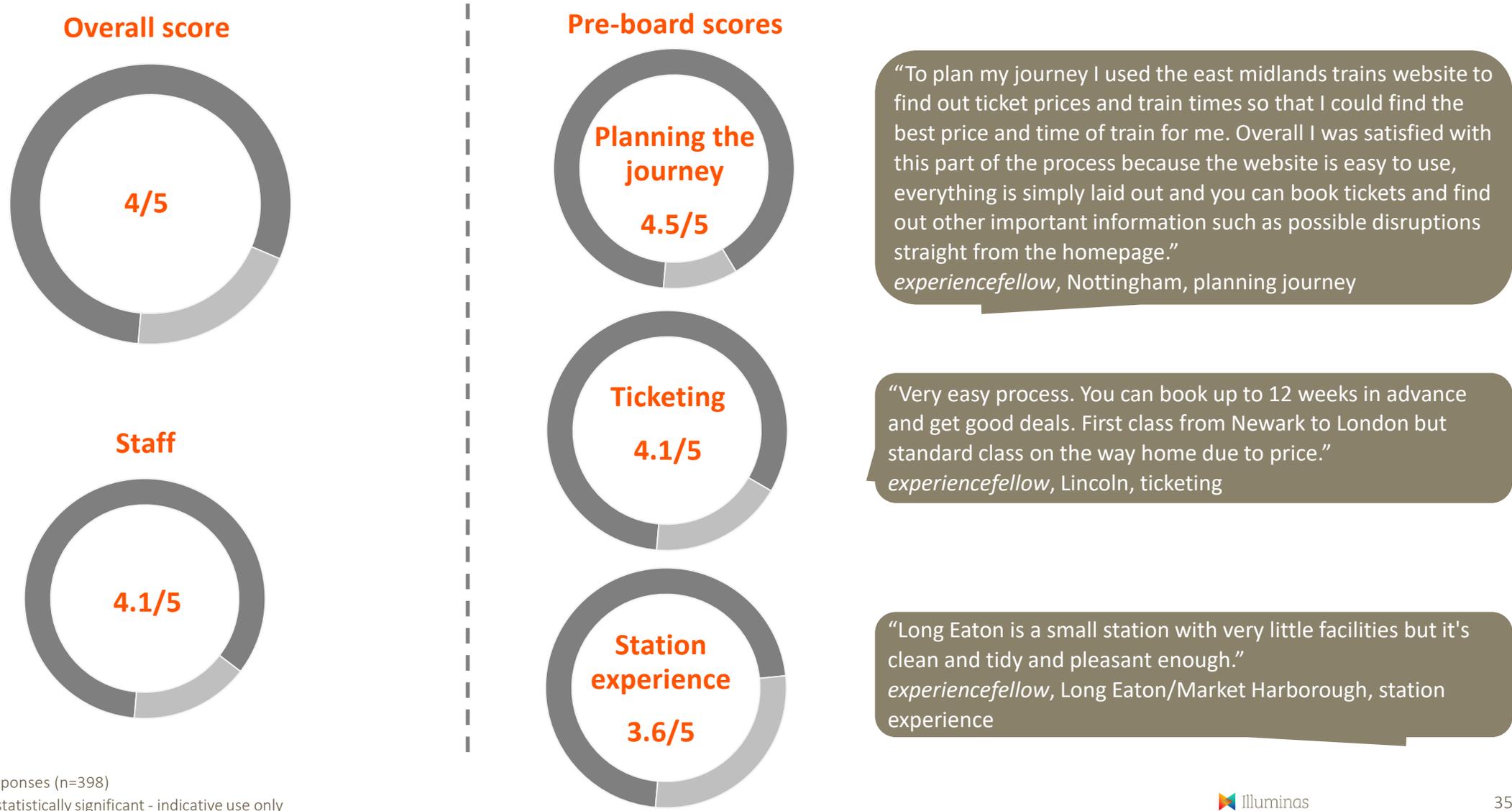


- Before the groups, 69 respondents carried a digitised pre-task on their smart phone, from which we received 398 responses
- In addition to satisfaction scores, respondents provided comments and photographs
- The pre-task involved recording their satisfaction scores for ‘moments’ along their train journeys
- These moments were rated instantaneously at different junctures along their journey
- The maps adjacent show the different locations in which respondents recorded moments
- These scores for different moments can be viewed on the following slide.



Pre-journey

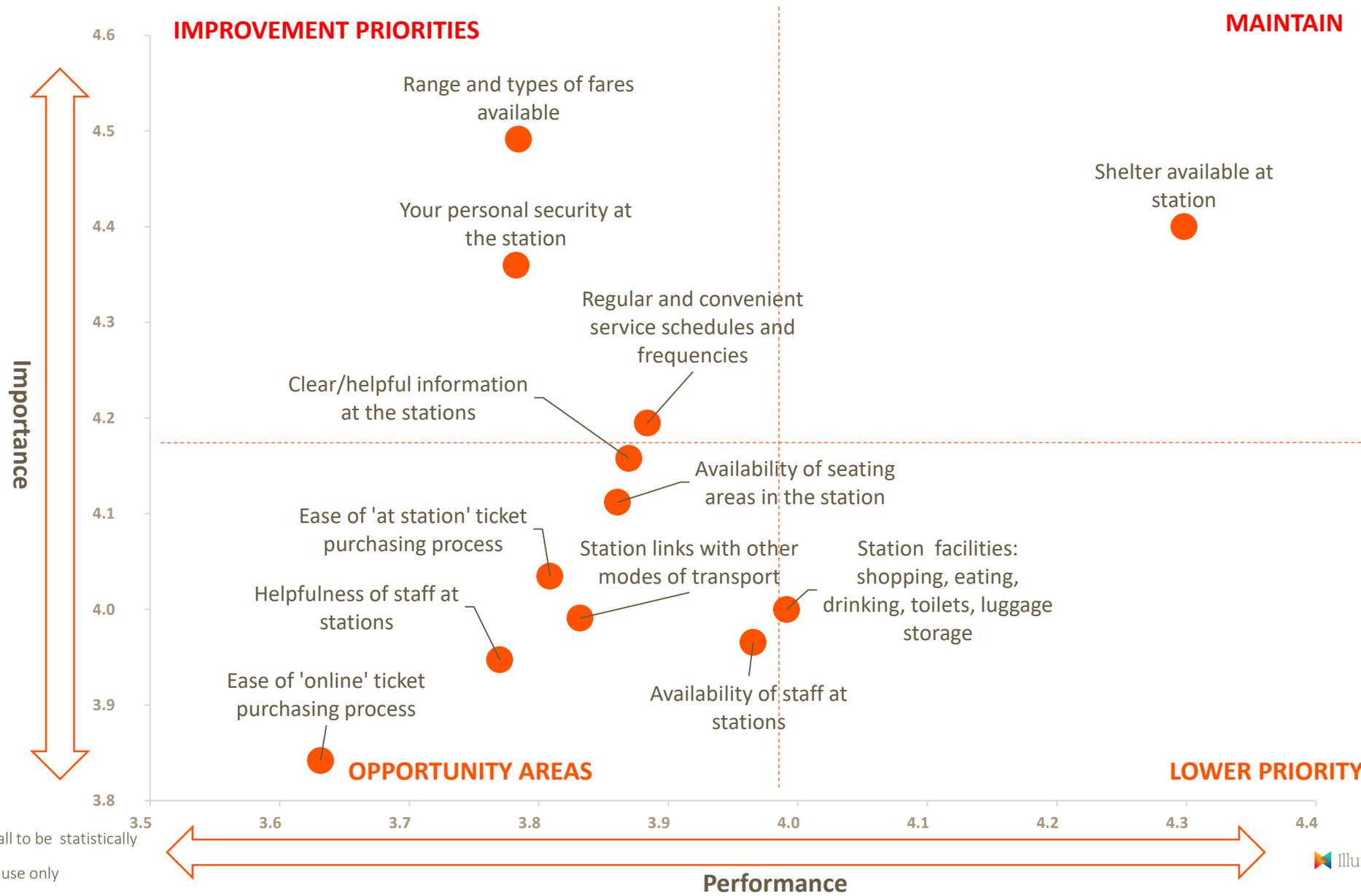
Pre-boarding satisfaction scores given by *experiencefellow* users



Base: (69) respondents, all responses (n=398)
NB: Base sizes too small to be statistically significant - indicative use only

Pre-Journey priorities matrix (pre-group lobby questionnaire)

NB: Performance (x axis) scores for pre-journey attributes are high across the board. The worst performing attribute is 'Ease of 'online' ticket purchasing process', which still performs relatively well at just above 3.6



Base: (n=116)

NB: Base sizes too small to be statistically significant - indicative use only

Pre-journey priorities for improvement by journey type

Business

Priority rank	Improvement priority	Base: (n=27)
1	Range and types of fares available	
2	Personal Security at station	
3	Availability of seating areas in the station	

Leisure

Priority rank	Improvement priority	Base: (n=45)
1	Personal Security at station	
2	Range and types of fares available	
3	Clear and helpful information	

Commuter

Priority rank	Improvement priority	Base: (n=44)
1	Regular and convenient service schedules and frequencies	
2	Range and types of fares available	
3	Personal Security at station	

“When I go to London and sometimes they say, such and such a ticket you’re not allowed to travel on this train, you must get off, you think well what have I got, I have no idea, I’ve just bought it on the Internet. I have no idea what I am allowed to use, and I just hope that nobody says to me when I get half way down the track, you’re not supposed to be on here.”
Kettering, Business Frequent

“I think it would be good if there was screens because sometimes we all get the train all the time so we know where we're going and all of it but some people can't really see it, like, especially the nights or in the winter and there's no announcement or they'll just announce the odd station.”
Mansfield, Frequent Leisure

“Sometimes in the small ones if there's nobody else there, or you're the only person on the platform and then suddenly some dodgy character come up and you think, oh God, there isn't anybody else around.”
Nottingham, Commuter Frequent

NB: Base sizes too small to be statistically significant - indicative use only

Pre-journey priorities for improvement by region

Central East Midlands

Priority rank	Improvement priority	Base: (n=54)
1	Personal Security at station	
2	Range and types of fares available	
3	Ease of 'at station' ticket purchase	

South East Midlands

Priority rank	Improvement priority	Base: (n=22)
1	Range and types of fares available	
2	Personal Security at station	
3	Station facilities	

Lincolnshire

Priority rank	Improvement priority	Base: (n=22)
1	Range and types of fares available	
2	Regular and convenient service schedules and frequencies	
3	Personal Security at station	

South Yorkshire and Staffordshire

Priority rank	Improvement priority	Base: (n=20)
1	Range and types of fares available	
2	Station facilities	
3	Helpfulness of staff at station	

"If it wasn't for the Internet, I would be totally confused."
Kettering, Business Frequent

"At Nottingham, at a big station. It's very light and there's always lots of people, cleaners and people going around, but it is harder in a small stations, fewer people."
Nottingham, Commuter Frequent

Overall service provision

Rail services operated by East Midlands Trains are seen as satisfactory and reliable

- Expectations are being met and 'the basics' are done well
- However, passengers view much of the rolling stock as old fashioned and simple

The key issue with the service provision is the frequency of trains along regional routes

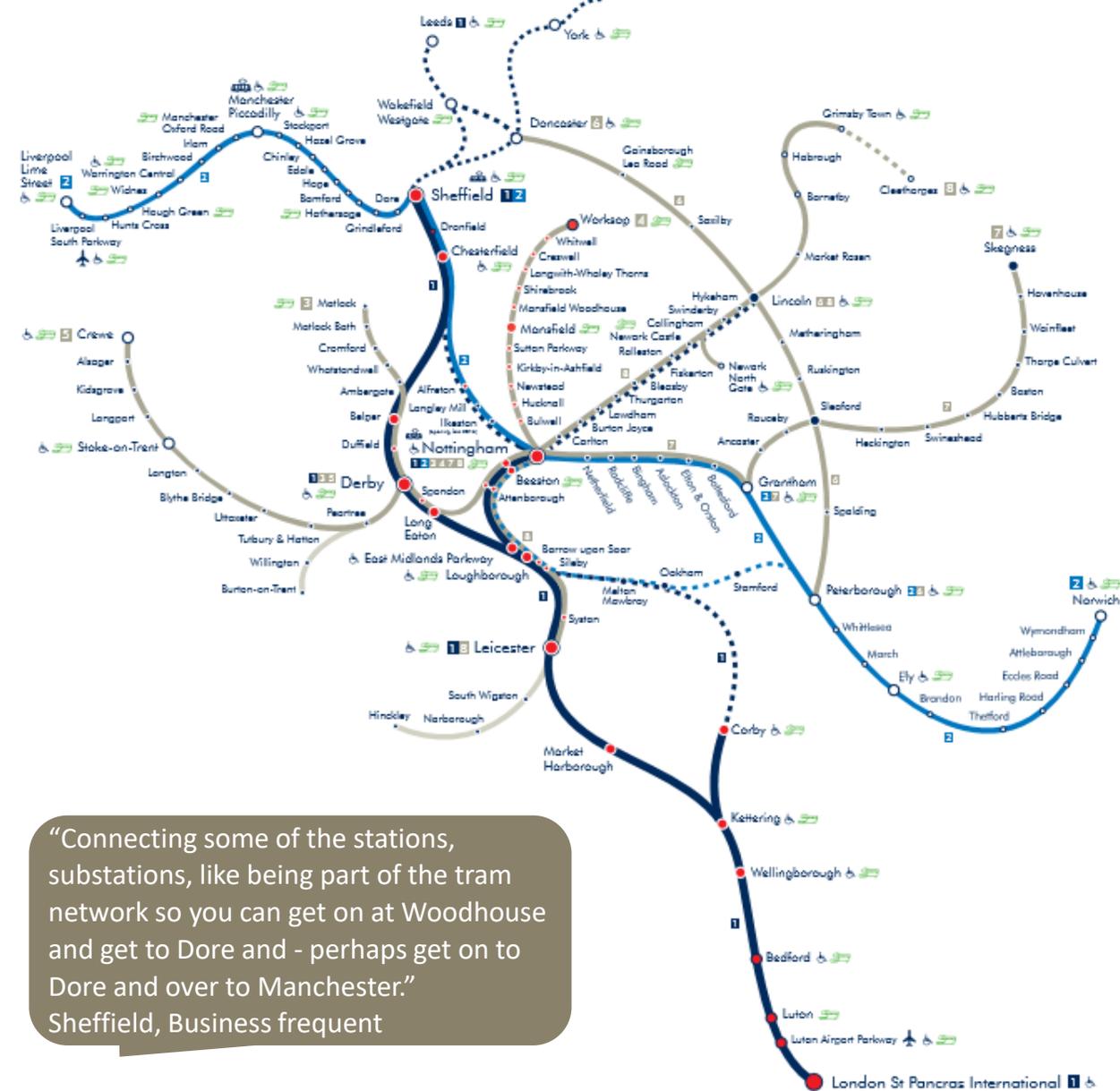
- This is of particular concern in rush hour times, whereby commuters are forced to get on the one train that comes hourly

Liverpool-Norwich Line

- Not recognised as a different quality or type of service to other regional routes, only differentiated by the journeys it serves
- Journeys through the peak district seen as idyllic, scenic and leisurely
- Some passengers at Sheffield would like to see stations near Sheffield (e.g. Dore) be connected to the tram network

Issues in Lincolnshire:

- Lines in Lincolnshire are reported to be the worst on the network, in particular the stretch between Nottingham and Lincoln where passengers report delays and more overcrowding
- Signalling issues in Sleaford causing delays on lines from Peterborough to Doncaster and 'the skeggy line'



Frequency of services vary between regional and mainline services

Midland Mainline service seen as frequent

- Many of the bigger stations have multiple services north and south (e.g. Nottingham)
- Central East Midlands seen as better serviced than peripheral regions on the network
- Overall there was a satisfactory level of frequency on mainline journeys
- Passengers unable to take late night trips back from London as the last train was perceived as too early

Regional services typically run once an hour

- Seen as inadequate, particularly at peak times
- Commuters have to catch a specific train, usually earlier than is optimum to avoid being late for work
- If train is missed, passengers must find alternative route or modes of transport to destination rather than wait for next train

- Less of an issue for leisure travellers during the day

Key concerns around weekend and late night services across EMT network

- Many would like to use the trains as a means of travelling when 'going out'
- This is not possible with current services ending at 9pm in some places
- Some weekend commuters cannot use services early in the morning or late at night

Timetabling issues for commuter trains into Lincoln

- Seen as unsuitable from Leicester and Nottingham direction; train either arriving into Lincoln too early or too late in the morning for commuters
- Some leisure users would use train for commuting if this was not the case

On the rare occasion when delays or cancellations do occur...

- There is much praise for digital displays that give an accurate time of delay, as well as hard copy notices up in the station if delays are anticipated
- Some passengers have said that they can listen to the radio in the morning for delays to their trains, as well as check EMT's twitter
- Some passengers would like text message updates if delayed
- More announcements on trains are encouraged if train stops on route

"Digital displays are very, very good and if there is going to be a delay it says, 'Expected' or 'Delay' and it gives you the time. Nine times out of ten it actually comes in at the time. It's normally quite spot on."
Peterborough, business infrequent

Leisure and business passengers mostly plan journeys online

Level of journey planning:

Commuters: most catch a specific train everyday that they can always get

Leisure: high degree of planning for long trips, most passengers are savvy to money saving methods that require extensive planning

Business: some planning involved

Online journey planning

- Vast majority of passengers used the internet in some form to plan their journey
- A split between smart phone, tablet and laptop users
- Popular websites for journey planning included:



- Websites seen as a place to compare tickets, buy tickets, check delays and times

“If I'm just looking at the times I'll just put Mansfield to Nottingham in Google, press the train icon and it just comes, I don't go on any site, it just comes up on my Google search what the times are and I use the App, the National, whatever, National Rail App.”
Mansfield, Leisure Frequent

EMT website performance

- EMT website popular
- Functionality is good, but felt to be old fashioned
- Many used the EMT website because it did not charge booking fees

Very few passengers still used traditional methods of journey planning

- Paper timetables, calling National Rail to ask for train times, using local ticket offices
- Passengers using these more traditional methods are typically infrequent leisure travellers that are older and/ or from rural areas
- Some passengers seeking out specific ticket structure (group tickets) go to the station to plan this journey for events like Hen parties.

“If I'm looking for a train for personal, because I'm using that one for work I'd go on to East Midlands website.”
Sheffield, Business

Getting to the Station

Passengers arrived at the station by a number of modes

- Car, bus, tram, walk, lift, bicycle



Connected stations:

Nottingham: tram service, buses and taxis link well with trains and seen as affordable

Sheffield: regular trams run straight into the station.

Poorly connected stations

Leicester: passengers that use Leicester station feel that it is poorly connected, has poor parking facilities and is located some way from a bus stop

Smaller stations:

- Some passengers at Sheffield would like to see stations near Sheffield (e.g. Dore) be connected to the tram network
- Some passengers would like to see smaller stations sign-posted.

“So a lot of bus stops can be closer to your house, or a taxi or whatever would take you to your house, as in even if I caught the train back from town, I'd have to still get from the train station to my house, so it would be easier for me to just get a cab. It might be a bit more, but at least then it's door-to-door.”

Nottingham, commuter frequent

Smaller stations

- Some instances whereby people do not know stations exist because of depleted infrastructures
- Some smaller stations cannot offer the same facilities as larger stations, nor staff numbers

Difficult layouts- level crossings

Seen as a barrier to passengers catching their train and can cause stressful situations

- Lincoln: recently improved by footbridge, but was an issue crossing the tracks at the level crossing
- Newark Castle: passenger must buy ticket from different platform. Passenger must cross level crossing to change platform. Can result in missed trains if barriers are down for extended periods.

Passengers have issues that are common to all rail services with regard to ticketing, but complaints from EMT passengers are less vehement

Issues with tickets are typical

- Appreciation of the range of fares on offer and the ability to get a bargain
- Leisure travellers particularly savvy on bargain hunting using various websites
- Large price differences travelling last minute to London often seem extreme and arbitrary
- Commuter season tickets seen as reasonable value
- Railcards valued, but there is confusion and lack of awareness of many different types of railcards
- More scope for better value family fares, which would appeal more to passengers travelling with children

“I've just got three of us down to London in July for £18, but to come home it's £95-plus and you think, 'Oh, I'm getting a good deal'... But when you look at the return it was ridiculous, £95 was the cheapest.”
Derby, Leisure Infrequent

Some cases whereby it is difficult for passengers to get a ticket

- Lack of ticket offices and ticket machines at suburban/ rural stations
- In some cases, ticket machine is only located on one platform and hard to find
- Ticket machines do not always sell all products (e.g. season tickets/group tickets)
- Ticket machines can often be broken
- Leads to confusion where no ticket machines are available- can they purchase on-board?

But, overall value seen as good

- In general, tickets not viewed as overly-expensive
- And some perceptions of East Midlands Trains as being comparatively cheaper than other operators
- This is particularly the case on the regional routes running East-West and compared to Thameslink

“The Mansfield one (ticket machine) hadn't been installed yet. The Sutton Kirkby and Hucknall ones had been vandalised. So, nobody could get a ticket.”

Mansfield, Leisure Frequent

“You go to the ticket officer, and they go, 'Here you go' and hand over about fifteen tickets. You're thinking you can go on a plane to, like, New York, with your phone and scan it, but you have to have 15 train tickets, it's mad.”

Sheffield, Business

“Feels friendly, working class, rather than polished, but sometimes polished and professional you can feel like they're cheating you a bit and they're not so friendly, and it's about revenue rather than being nice, friendly people.” Nottingham, Commuter Frequent

Issues were raised concerning the rules of having a ticket on-board and the resulting experiences with revenue protection

There is confusion surrounding what 'the rules' are regarding not having a ticket on-board

- Some passengers think it is OK to buy a ticket on-board with a conductor
- Some passengers are unsure but buy a ticket in advance anyway
- Some passengers think you are unable to buy a ticket on-board
- Some passengers do not buy a ticket at all in the hope they won't be charged!
- E.G Passengers using the Liverpool-Norwich line report not having to pay between Dronfield and Chesterfield due to lack of ticket officers.

Lack of clarity over 'the rules' leads to stress and anxiety

- Many passengers unaware if they will be punished or penalised by officials if they do not have a ticket on-board (which is often the case for those law-abiding travellers that come from rural stations without ticket machine or ticket office)
- In addition, revenue protection officers can be seen as intimidating (wearing 'big stab-proof vests'), adding to anxiety.

Revenue protection officers not seen as EMT staff

- Can be viewed as government officials, part of the Transport Police or an unknown body.



"My kids'll get the train from Dronfield to Chesterfield and they'll be like, 'Oh, we didn't have to pay! There was no man!' I was like, 'You should pay at the other end!' It's like a quid or something. 'We beat it, we beat the system.' 'Yes, all right!'"

Sheffield, leisure infrequent

"You have to get there earlier enough to go to the ticket machine, find out that it doesn't work, come out and hope that there's not a queue to get one and if you get on the train and the guys don't come up and down because I've gone there and back without being checked, well the enforcers come on the train, you can't buy a ticket because there's, no one's been to see you as yet."

Mansfield, Leisure Frequent

The larger stations are seen as satisfactory, but smaller stations can be viewed as underinvested and run-down

Larger stations

- Have all the key components: toilets, places to eat, waiting rooms etc.
- Refurbishments (e.g. Nottingham and Derby) noticed and are a signal of investment in local area
- Big platforms not sheltered in entirety: passengers are susceptible to the weather
- Some stations seen as cramped at peak times (Sheffield, Peterborough)
- Some flagship stations (e.g. Sheffield) not seen as being big/grand enough
- Accessibility to Leicester station restricted (poor parking and integration with local bus services).

Some smaller stations seen as run down and neglected

- Lack of lighting, toilets, cafes and ticket offices
- Many feel stations are neglected with no staff or staff only at certain times; intimidating places to wait or alight, particularly at night, particularly in the cities
- Neglected stations seen as symptomatic of run down areas and struggling local economies
- Staff are helpful but few and far between.

Smaller community stations

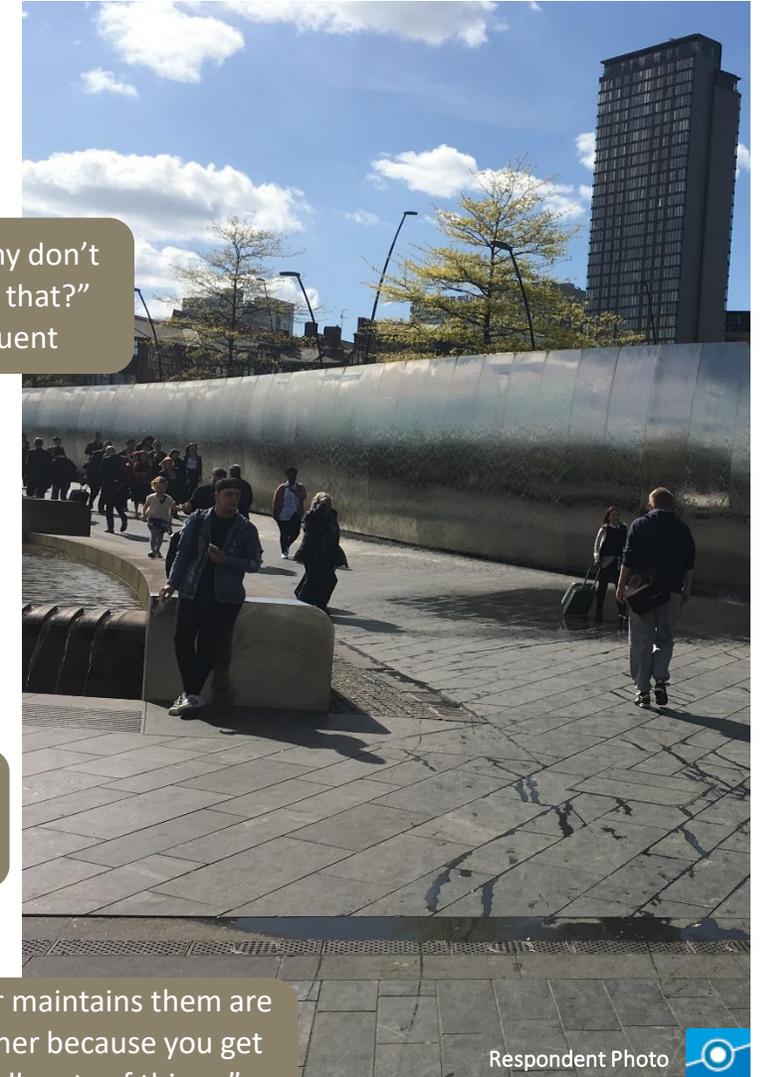
- Some 'picturesque' and 'old fashioned' stations that generate affection and are valued for their character, particularly along the Liverpool-Norwich line running through the Peak District between Sheffield and Manchester (Edale, Grindleford, Bamford, Hope)
- Some have been part of community regeneration projects and this is valued.

"Look at St Pancras! Why don't we have something like that?"
Sheffield, business frequent

"Longport is derelict, in the middle of nowhere. I didn't even think trains were still running from there."
Stoke, commuter frequent

"Whoever runs them or maintains them are trying to outdo each other because you get baskets of flowers and all sorts of things."
Sheffield, leisure infrequent

Outside Sheffield Station



Respondent Photo

East Midlands Trains is seen as reliable and punctual

Nottingham Station



Respondent Photo

Commuters are very satisfied with reliability of service

- Many say that they can set their watch by it
- Passengers spontaneously bring up the reliability and punctuality of the service in group discussions
- Seen as the most important aspect of the service

Some peak time services are frequently one or two minutes late

- This is seen as a source of amusement rather than annoyance

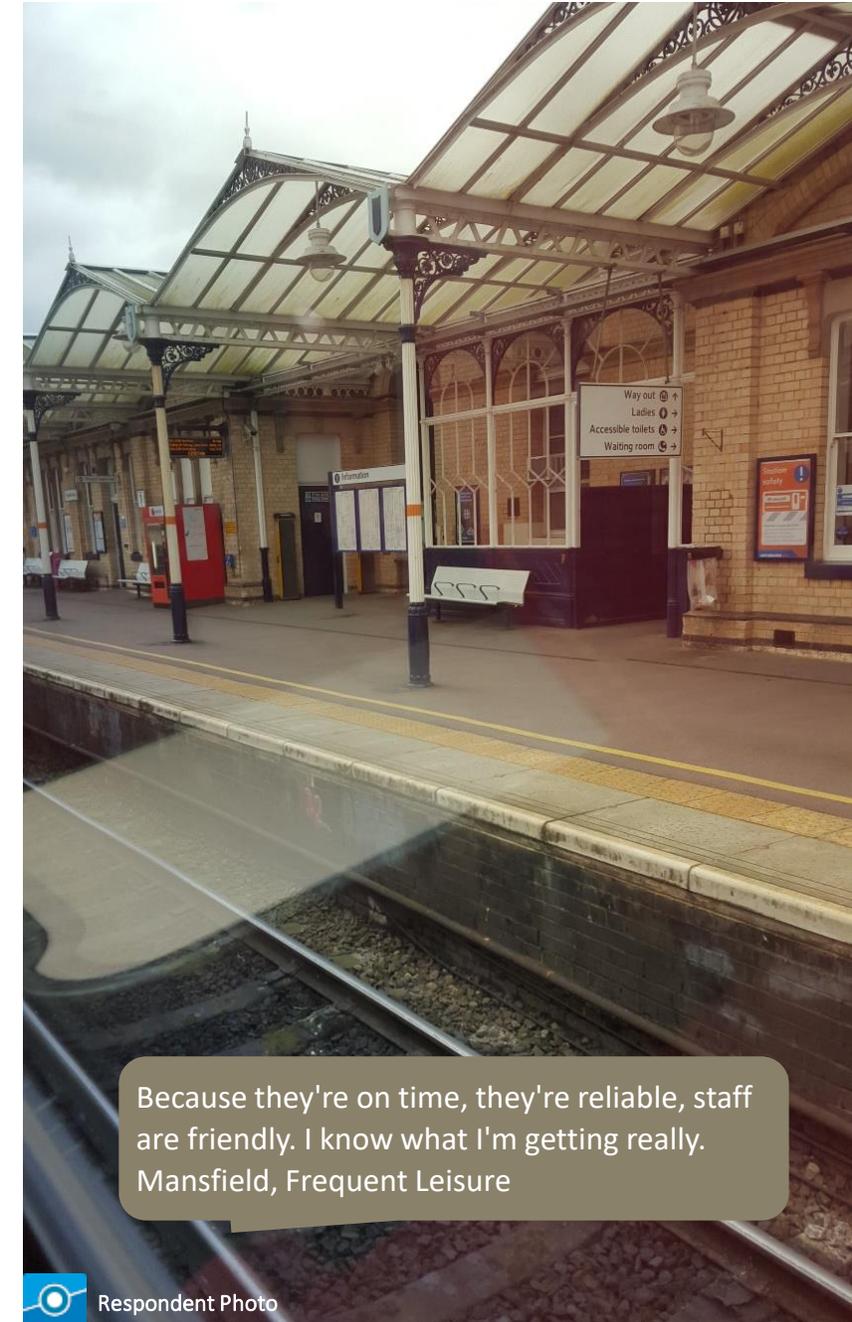
I can set my watch by it [EMT service].
Stoke, commuter frequent

On the mainline service to London, EMT offers more reliable services than Thameslink

- Thameslink has a likelihood of changing the route and more prone to cancellations and disruptions
- This is a key issue for commuters and why they are more likely to use EMT

East of Nottingham at places such as Sleaford

- This is seen as the worst part of the network



Because they're on time, they're reliable, staff are friendly. I know what I'm getting really.
Mansfield, Frequent Leisure

Respondent Photo

Loughborough Station



On train-
experience

Respondents rate the on-board experience somewhat worse than the pre-journey experience



Respondent Photo



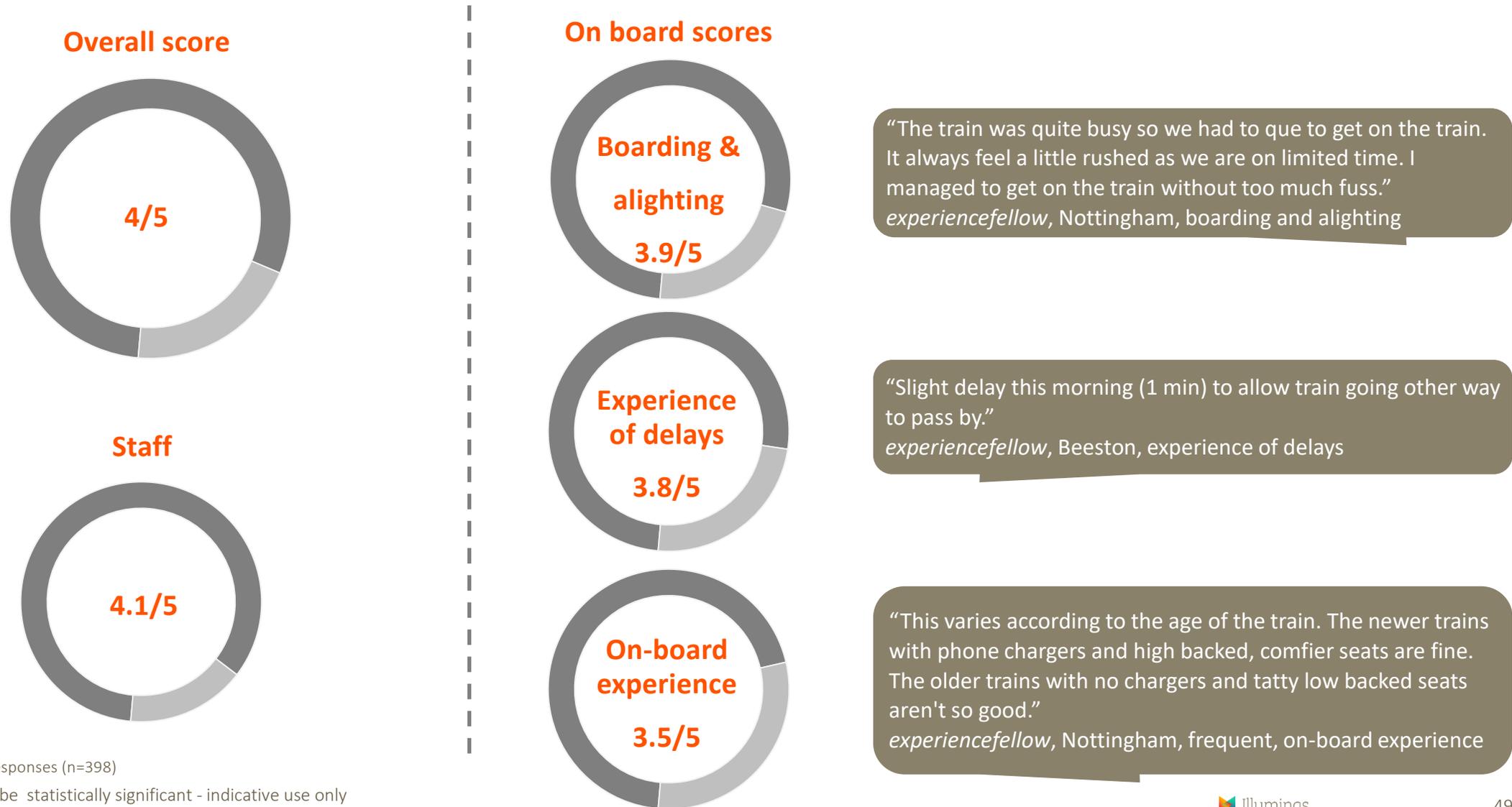
Most important and pressing issue was:

- The state of the regional rolling stock and lack of on-board space

Other key issues included:

- Frequency of services along regional routes
- Lack of modern on-board amenities and facilities
- Lack of on-board safety measures.

On-board satisfaction scores given by *experiencefellow* users

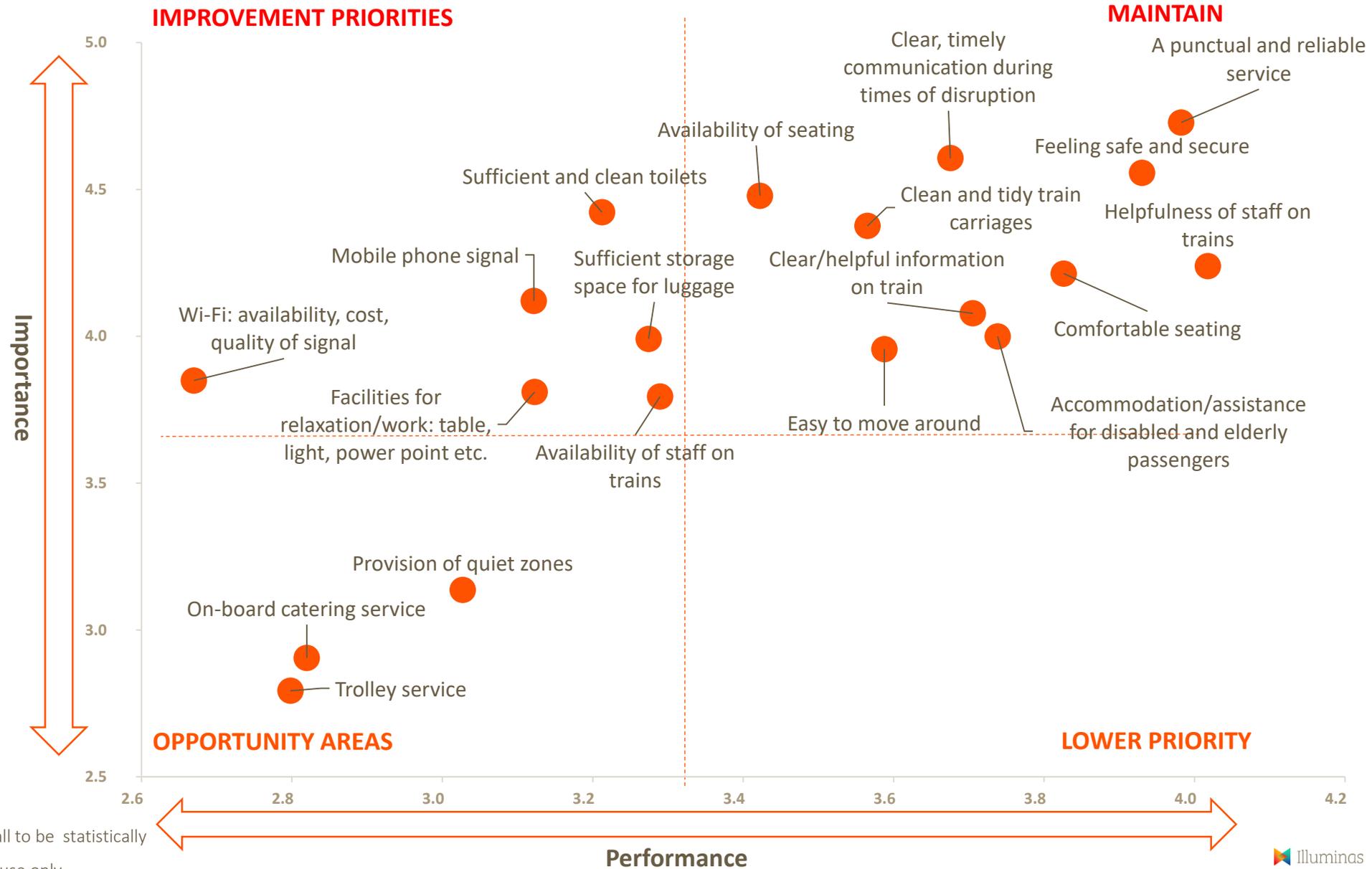


Base: (69) respondents, all responses (n=398)

NB: Base sizes too small to be statistically significant - indicative use only

On-board priorities matrix

NB: Unlike performance scores for pre-journey attributes, on-board attributes vary significantly.



Base: (n=116)

NB: Base sizes too small to be statistically significant - indicative use only

On-board priorities for improvement by journey type

Business

Priority rank	Improvement priority	Base: (n=27)
1	Wi-Fi availability, cost, quality of signal	
2	Mobile phone signal	
3	Availability of seating	

“That's one last thing about East Midlands Trains actually, Wi-Fi, I think you can only get Wi-Fi in first class, can't you, or free Wi-Fi anyway.
It's really bad, I can never log on.”
Sheffield, Business

Leisure

Priority rank	Improvement priority	Base: (n=47)
1	Sufficient and clean toilets	
2	Sufficient storage space for luggage	
3	Clear/ timely communication during disruption	

“They're like prison toilets, they're not big enough. They're not really high. When you're going out on a Saturday night, I understand you're drunk and everything but you want to touch a hand, you know, guys pissed or can't stand straight there, he's touched the handle and there's always toilet roll clogging the toilet so you can't properly use the toilet and they're not clean. They don't look clean to me.”
Mansfield, Frequent Leisure

Commuter

Priority rank	Improvement priority	Base: (n=44)
1	Wi-Fi availability, cost, quality of signal	
2	Mobile phone signal	
3	Sufficient and clean toilets	

“Connection in spurts and then it disappears. Up to about Lowdham and then it comes back about Newark and then it disappears almost immediately, so if you want to do your emails while you're sitting on the train....”
Nottingham, Commuter

NB: Base sizes too small to be statistically significant - for indicative use only

On-board priorities for improvement by region

Central East Midlands

Priority rank	Improvement priority	Base: (n=54)
1	Wi-Fi availability, cost, quality of signal	
2	Mobile phone signal	
3	Sufficient and clean toilets	

South East Midlands

Priority rank	Improvement priority	Base: (n=22)
1	Wi-Fi availability, cost, quality of signal	
2	Facilities for relaxation/work	
3	Sufficient and clean toilets	

Lincolnshire

Priority rank	Improvement priority	Base: (n=22)
1	Wi-Fi availability, cost, quality of signal	
2	Sufficient storage space for luggage	
3	Sufficient and clean toilets	

South Yorkshire and Staffordshire

Priority rank	Improvement priority	Base: (n=20)
1	Clear and timely communication during disruption	
2	Mobile phone signal	
3	Wi-Fi availability, cost, quality of signal	

“You're paying like £70, £80 and you're not getting either charging point or coffee.”
Leicester, Commuter

“I think that's [Wi-Fi] the way forward now, isn't it? It's what everybody's expecting, isn't it? You've got to move with the times.”
Peterborough, Business Infrequent

NB: Base sizes too small to be statistically significant - indicative use only

Regional: rolling stock seen as old fashioned

Inside Regional Rolling Stock



Dated design

- Colours on-board train seen as dated.

Antiquated feel

- Train felt to be 'rickety' and noisy
- The ride is not as smooth as the mainline service.

"We notice more delays when there's leaves on the line, but you can actually feel the train slipping on the leaves."
Lincoln, Commuter frequent

Subtle differences in rolling stock

- There were differences between 'the blue train' and 'the white train'



- The white train was seen as superior; smarter, quieter, more comfortable, spacious and with high backed seats
- But passengers notice fewer white trains
- Passengers' decisions on getting to work can be influenced by the train they expect to board (e.g. passengers may leave earlier to get on the white train).

Restricted capacity

- One carriage on some routes (e.g. Lincoln-Nottingham, Derby-Crewe)
- Can lead to overcrowding, particularly at ad-hoc popular times (local events such as football matches) as well as peak times

"When I was on my way home today when I saw that was the high-backed one pull into the station. That one will have a comfy seat in has more leg room and it's quieter."

Mansfield, Leisure Frequent

- Rolling stock design is too narrow, seats too close together and cramped
- Insufficient room for luggage
- Overcrowding on the EMT network has the potential to have long-term negative effects on children's perceptions of EMT, which is otherwise often typically a positive and memorable experience.



Inside Regional Rolling Stock

Midland Mainline: higher quality trains than regional but still room for improvement

Inside Mainline Rolling Stock



Respondent Photo

Improved look and feel of carriages

- A more modern, brighter and cleaner appearance
- Better temperature and ventilation (i.e. not too hot/cold).

“Air-con and high-backed seats and the sound difference - quieter running.”
Mansfield, Leisure Frequent

Better facilities

- Plug sockets provided for laptops
- Better layout of seats and table so that people can work/relax more comfortably on-board
- Seats more comfortable and spacious
- Passengers notice improvement in new rolling stock; previous rolling stock did not have plug sockets and passengers had to lean out of window to open door.

Higher quality of service offered

- Higher numbers of helpful approachable staff
- More catering options i.e. a well stocked food and drink bar
- Better system for seat reservations resulting in less confusion for passengers.

“We try and encourage our children not to eat rubbish and it's just full. There's no healthy snack. It's either alcohol, tea or coffee, Twix is always there isn't it?”
Sheffield, Leisure Infrequent

However there is still scope for improvement

- Lack of available seating on crowded services
- Lack of suitable storage for luggage
- Improved Wi-Fi and phone signal required
- Parts of rolling stock seen as dirty and untidy such as carpet, seats, toilets
- Appearance still seen as dated compared to some other TOCs
- More staff needed for late evening and weekend services.



Respondent Photo

Passenger highlighting dirty carpets

Passengers asking for more, modern and slick amenities, which are factors that influence their perception of a quality rail service

Catering

- On-board ‘food bar’ or vending machines preferred to trolley- passengers draw comparisons with Virgin (not needed for short/local journeys or shorter mainline journeys)
- Commuters would like to see on-board coffee and tea being offered for free, recognised as going one step further.

“They need to try and update the food side of it. It just needs massively updating. It's too old-fashioned...”

Sheffield, Leisure Infrequent

“I would seriously have to be really desperate. It's really smelly. Smelly and wet. Really wet.”

Derby, Leisure Infrequent

Toilets a ‘no go area’

- Passengers do not like to use the toilet on-board the train, expectations are for cleaner facilities
- There is however an acceptance that all toilets on all trains are bad and this is not specific to East Midlands Trains.



Trolley service on the mainline

Desire for plug sockets

- Plug sockets are indication of quality on-board and are important for most audiences
- Those travelling for business purposes require plug sockets to work on-board; enables passengers to utilise time efficiently on the train
- Many young passengers travelling for leisure, or to and back from university, like to use laptops on-board for entertainment and work purposes
- Also useful for charging phone, this is also relevant for those meeting people at their destination station and might need their phone charged for this purpose.

Wi-Fi and mobile phone signal

- Seen as something that is necessary and needed in modern times and bring in line with other industries and travel modes
- Most passengers think that Wi-Fi should be free to access
- Select few passengers do not think they ‘need’ Wi-Fi. They see this as an extravagant want and a luxury- would rather EMT focus on the ‘important’ things.



Plug socket on the mainline

Overcrowding is a pressing issue for passengers travelling at specific times across the network

When prompted and probed, passengers raised issues of **overcrowding** on certain journeys (e.g. morning rush hour).

Overcrowding at seemingly **predictable** times (large local events and football matches) seen as inexplicable.

Overcrowding can lead to passengers suffering with:

- High stress levels
- Anxiety
- Lack of safety

Overcrowding raised in the Lincoln commuter group raised spontaneously as a significant issue.

Pain points

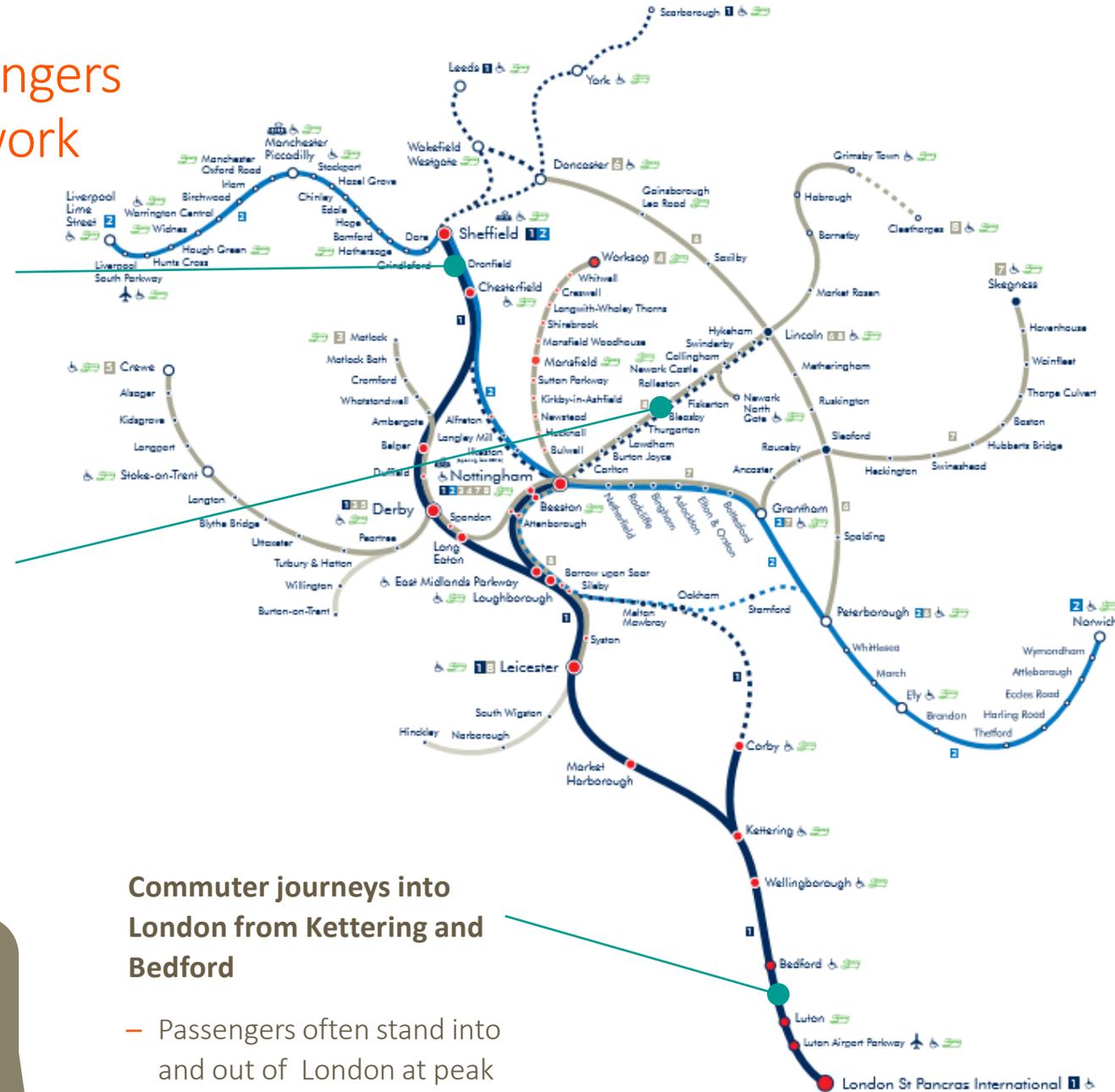
Journeys into Sheffield

- Coming back into Sheffield for daytrips can be very busy and people talk about 'fighting for a seat', but not seen as something happening on a daily basis.

Journeys between Nottingham and Lincoln

- Certain trains: morning rush hour and 4.30pm (end of school day) are seen as overcrowded and the problem is perceived to be the single coach.

"It's busy on the 4:30 train from here and you've got school kids and everybody... They only put one coach on...you've got to be there at ten-past-four to get a seat."
Lincoln, commuter frequent



Commuter journeys into London from Kettering and Bedford

- Passengers often stand into and out of London at peak times.

Some concerns raised over passenger safety on board train with regard to anti-social behaviour of other passengers

Passengers feel secure most of the time when on-board EMT trains, however there are some concerns.

Passengers concerned about anti-social behaviour in the following circumstances

- Football match travellers
- 'Drunks'
- Especially concerned in these circumstances if they have young children.

Passengers are aware that there is 'no escape' from these situations when on East Midlands Trains

- Staff not visible enough and seen as unhelpful in anti-social incidents
- Staff not felt to be trained to deal with such scenarios.

"You can't get off a train like you can get off a bus."
Lincoln, Leisure frequent

"I've had problems coming back from the football at Norwich where we've been on the train with away fans at Peterborough. And you know, things have kicked off a bit, but there's no one on the train to intervene. And if there is someone on the train he locks himself away in the conductors box and stays out of it."
Lincoln, leisure frequent



Respondent Photo
CCTV sign on regional train

Presence of CCTV on-board noticed by very few respondents

- Passengers not aware of on-board CCTV, and those that are aware are not convinced there is anyone watching
- Those that are aware of CCTV do not see it as a deterrent to anti-social behaviour.

"You don't feel comfortable sometimes ... because there's no one necessarily around."
Derby, Frequent Commuter



Passenger highlighting Station CCTV

Passengers would appreciate some improvement to the First Class service on EMT

The First Class experience is a disappointment for regular First Class passengers

- EMT does not offer the kind of experience expected by regular First Class travellers, particularly those who use the Virgin service
- The carriage environment and amenities are not of a standard expected
- In addition, the quality of the catering compares particularly unfavourably with the catering options offered by Virgin.

“Sometimes in first class you get your teas and your coffees and then other times it's like nowhere to be seen, and you're like, 'What's the difference between this journey compared to the others?’
Sheffield, leisure/business infrequent

I've done it loads cheaper loads of times, and I've been first class for 20 from Nottingham.”
Nottingham, commuter frequent

Compounded by inconsistencies in the First Class service

- Examples include passengers who don't receive any complimentary drinks
- Others experience poor on-board customer service
- Due to the diverse nature of the stock, passengers also feel a number of the First Class carriages are old, tired and need refurbishment.

However passengers found First Class affordable

- There is a general recognition that the cost for First Class, especially for those booking in advance, is relatively low
- The cost is felt to compare well with most other TOCs
- Some passengers find they could go First Class for the same amount as a Standard fare for pre-booked journeys.

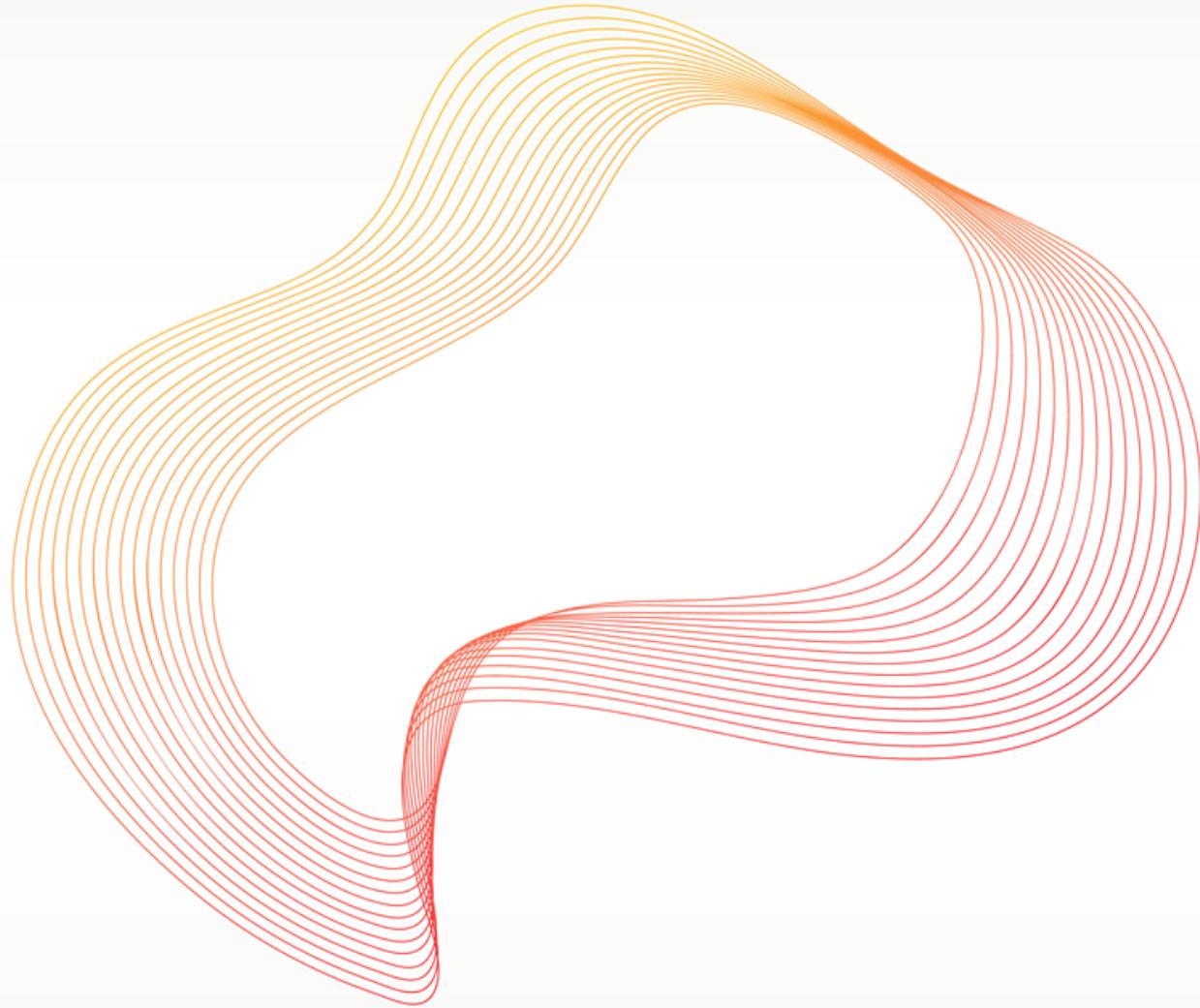
And First Class offers some improvement to Standard Class

- The seats are seen as comfier and larger
- Carriages are typically found to be quieter and more spacious
- People appreciate the ability to be able to receive free Wi-Fi
- Staff are (usually) more visible and attentive
- Passengers typically receive free tea/coffee and other light refreshments.

Passengers also speak highly of the First Class lounges

- Seen as offering a superior travel experience to the one which involves using station facilities.

“I never travel First Class, but me and the girls were going on a Hen and thought you know what, it's not that expensive is it? Sao that's what we did!”
Lincoln, commuter frequent



Passengers with disabilities

Disabled passengers experience issues with lack of on-board space, station accessibility and comfort

On-board space

- On the regional services, the compartment with the wheelchair space is the toilet, luggage and pushbike carriage
- This is greatly improved on the midland mainline service: if wheelchair spaces have been taken up, passengers have been upgraded to first class- seen as excellent customer service

“You can feel like a piece of luggage sometimes, whereas on the trains on the midland mainline to London you travel much more with other passengers.”
Nottingham, mobility

Comfort

- Seats are not comfortable for many passengers with mobility impairments and anorexia

Toilets

- Luggage, bikes, buggies etc. can be in front of the toilets. This is difficult for some disabled passengers to move.

Inconsistencies in accessibility of certain stations

- Some disabled passengers know how to ‘negotiate’ their local station but are unsure of others - this is a major deterrent for leisure travel
- When lifts are out of order those with mobility impairments cannot travel- however this is a rarity

Long journeys can be seen as particularly stressful

- Anxieties around being left and forgotten
- Changing platforms seen as big obstacle

- If problems occur the consequences are perceived to be more problematic for those with disabilities
- Some passengers require a wide range of amenities and support along their journey (e.g. refreshments to wash medication down with)
- Toilets are far more of a salient issue for passengers with disabilities that rely on using toilets regularly

“I would love to go to the coast to Skegness, but I know there are all these changes and that just makes me feel so anxious because I don’t know if these stations are accessible. The fear is that I will get stranded. Because that has happened to me in the past.”
Mansfield, leisure mobility/mental health

Disabled passengers' key priorities for improvement are around assistance services and staffing

Assistance services

- Varying accounts of quality of assistance services
- Passengers would like assurance and guarantees that assistance services will work along their whole journey
- One bad experience is enough to put off passengers for a long time
- Some unaware of assistance services completely

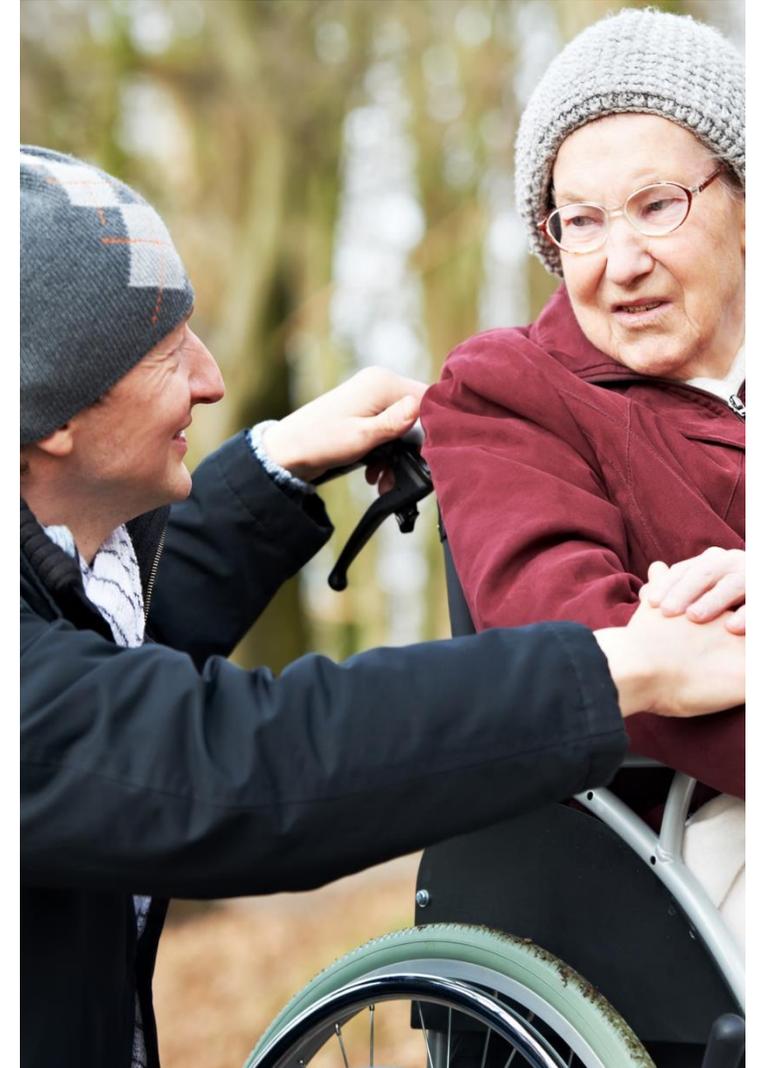
Staff

- Most staff seen to be friendly and helpful
- Some cases where staff have not understood disability, or have not shown compassion
- Mostly staff are there when you need them- but when they are not this can lead to traumatic experiences that have the potential to put passengers off train travel for a long time

“On the East Midlands Trains the disabled assistance is more reliable. It’s not unusual to be left on the train at St Pancras and to have to shout to a passer by and alert them to come and bring the ramp.”
Nottingham, business user mobility

“I had no idea about these assistance services. But now you’ve told me about them I will look into it and it will make travelling to my appointments much easier.”
Mansfield, leisure mobility/mental health

“I had one horrific experience that put me off train travel for 3 years. I was discriminated against by a member of the East Midlands staff...he kept coming and having another go at me throughout the journey. When I got off he shouted across two platforms to the staff ‘she can walk I’ve seen her get up to go to the toilet’.”
Nottingham, mobility





Value for money?

Overall East Midlands is seen as offering a (mostly) good value service

EMT performs well on value because it is able to offer a regular, punctual and convenient service

- Over shorter distances and with lower fares, passengers are willing to put up with a degree of overcrowding and lack of facilities in return for the speed, convenience and reliability evident on the EMT service.

It is seen to offer good value compared to other modes of transport

- After taking into account factors such as costs of parking and petrol as well as congestion on the roads, EMT offers better value over short-medium distances than car
- It also offers greater speed, predictability and convenience than bus or coach.

“I go from Derby to Sheffield, the 9:05, £11.50 return off peak, I can't drive cheaper than that.”

Derby, Frequent Commuter

And compared to other TOCs

- Midland Mainline performs better than many other TOCs such as Thameslink and London Midland on punctuality & reliability and train service frequency
- Passengers do not see any discernible difference in price and in many cases EMT is seen as the cheapest service offered.

As distance and price increase, passengers expect more from EMT

- Aspects of the service such as overcrowding and poor facilities – especially in conjunction with ‘expensive tickets’ – push some EMT passengers into a ‘poor value’ mind-set over longer distances
- EMT is not seen as offering the more premium service of certain other TOCs (specifically Virgin) on factors appreciated over longer distances such as carriage environment and catering
- EMT passengers, therefore, see themselves paying the same amount as others using ‘higher quality’ services.

- **Nonetheless**, some passengers do recognise that there are bargains to be had and are savvy to the different long distance deals available.

Variability in service frequency and availability

- The Midland Mainline routes provide far more regular services than regional services
- As a result, the sense of value amongst passengers who use the regional service is impacted on by the lower number of carriages and trains available

Many passengers also want more recognition and reward for regular use

- Better value family fares, offering discounts for families consisting of more than just two adults and two children
- Customer reward programmes that provide regular passengers with points that can be accumulated over time.

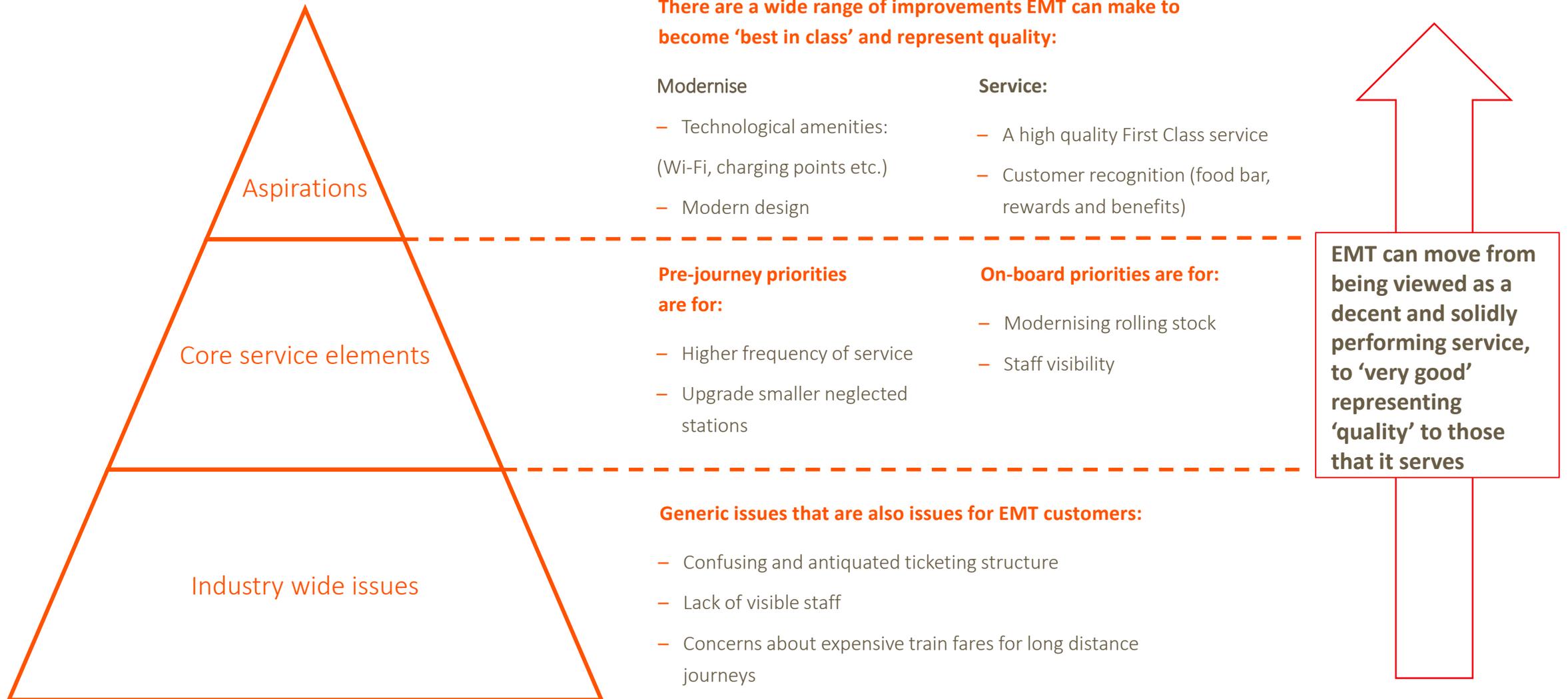


Summary and conclusions

Recap

- Overall, East Midlands Trains performs well on core passenger requirements, especially with regard to punctuality and reliability
- Taken in the round, EMT is typically marked as '7 or 8 out of 10'
 - It holds up well in comparison to other modes of transport where there are alternatives for passengers
 - And is seen as providing a better service than many other train companies
 - There is a degree of affinity with the EMT brand
- However, EMT falls short of offering the same kind of customer experience as market leading TOCs
- In addition, service provision is highly variable, with there being stark contrast between the 'North – South' mainline route when compared to 'East – West' local services
- Thus, while EMT rarely profoundly disappoints, it also struggles to 'excite and delight'
- To some extent, passengers' views of EMT are a product of conditioning: they see EMT as operating in a 'mid-market' space, are used to a 'middle of the road' experience and expect more of the same,
- People feel that it offers value for money. However absence of some aspects of the service do impinge on these feelings of value, such as lack of seating and absence/lack of visibility of on-board staff members
- That said, there is still substantial room for improvement in some areas.
- For the local East - West routes there are some quite fundamental service shortfalls:
 - Limited service frequency
 - Quality of rolling stock
 - And - especially - overcrowding
- These issues also apply, albeit to a lesser extent, to the North- South mainline, but here the need (and the opportunity) is to raise the bar to match the market leaders.

East Midlands Trains has a platform of trust and mostly do the basics well, but could make improvements to reach 'best in class' once remedial core service elements are addressed





Illuminas
Enlighten. Empower.

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