



**Populus**

## Derby resignalling works Wave 2

transportfocus 

Understanding customer awareness and satisfaction



## Agenda

|   |   |
|---|---|
| 1 | Background and objectives                                   |
| 2 | Today's journey   |
| 3 | Awareness and understanding of the Derby resignalling works |
| 4 | Information channels  |
| 5 | Perceived impact of the works and level of support          |
| 6 | Key insights  |
| 7 | Appendix  |

## Background and approach



### Project background

- The railway at Derby is undergoing a major programme of modernisation works in Summer to Autumn 2018, including replacing life-expired signalling, improving track layouts and constructing an additional platform
- The works are to enhance the reliability, punctuality and flexibility of services through the station
- The disruption will run across 79 days between July and October 2018; affecting both East Midlands Trains and CrossCountry services travelling to, from or through Derby station
- Populus has been commissioned to evaluate awareness of the works over time and the effectiveness of each phase of communications ahead of and during the service alterations between July-October 2018



### Project approach

- Populus is undertaking four separate waves of quantitative fieldwork, with self-completion postal questionnaires handed out at stations and on trains covering East Midlands Trains and CrossCountry routes. This is supported by an online survey using the train operators' databases and social media
- The four stages of the fieldwork are shown below. This report focuses on Wave 2, which was after the first campaign burst. In total, we interviewed 1171 passengers
- **Wave 1** - Benchmark (*Nov-Dec 2018*)
- **Wave 2** – First Campaign Burst (*Feb-March 2018*)
- **Wave 3** – Second Campaign Burst (*May-June 2018*)
- **Wave 4** – Disruption Period (*July-Oct 2018*)
- An initial qualitative stage, consisting of focus groups with different rail user types in December 2017, helped to identify key needs and guide the communication programme

## Detailed methodology



| Respondents recruited via | Face-to-face pen and paper postal returns  |            | Online survey (via TOC newsletters, mail-outs and social media posts) |                      |  |            |
|---------------------------|--|------------|---|----------------------|--|------------|
|                           |  | <u>W1</u>  | <u>W2</u>   |                      | <u>W1</u>  | <u>W2</u>  |
| Wave 2 sample size        | <b>Total</b>   | <b>320</b> | <b>811</b>  | <b>Total</b>         | <b>181</b>   | <b>354</b> |
|                           | East Midlands Trains   | 203        | 503   | East Midlands Trains | 137  | 178        |
|                           | CrossCountry   | 117        | 308   | CrossCountry         | 44   | 176        |
| Fieldwork dates           | <b>W1</b> – 29 <sup>th</sup> Nov – 6 <sup>th</sup> Dec 2017<br><b>W2</b> – 14 <sup>th</sup> Feb – 3 <sup>rd</sup> Mar 2018   |            |   |                      | <b>W1</b> – 29 <sup>th</sup> Nov – 6 <sup>th</sup> Dec 2017<br><b>W2</b> – 7 <sup>th</sup> Feb – 25 <sup>th</sup> Feb 2018 |            |
| Routes covered            | <b>East Midlands Trains</b><br>1. Derby – London 2. Sheffield – London 3. Derby – Crewe 4. Newark – Matlock 5. Derby – Nottingham<br><b>CrossCountry</b><br>6. Edinburgh – Plymouth 7. Newcastle – Reading 8. Cardiff – Nottingham   |            |   |                      |  |            |
| Shift Distributions       | <b>Station platform shifts:</b> Derby (7 shifts), Nottingham (2), Chesterfield (2), Sheffield (2), Long Eaton (1)<br><br><b>On-board shifts:</b> Sheffield – Derby (CrossCountry routes – 4), Derby – Crewe (East Midlands Trains – 2), Derby – Matlock (East Midlands Trains – 2) |            |   |                      |  |            |

## Sample sizes

A considerably higher sample was achieved in W2, with regards to both face-to-face pen and paper returns, and online interviews:



| Base Sizes | Total |      | Face-to-face pen and paper |     | Online |     |
|------------|-------|------|----------------------------|-----|--------|-----|
|            | W1    | W2   | W1                         | W2  | W1     | W2  |
| Total      | 501   | 1170 | 320                        | 811 | 181    | 354 |
| EMT routes | 338   | 681  | 203                        | 503 | 135    | 178 |
| XC routes  | 161   | 484  | 117                        | 308 | 44     | 176 |

Although the W1 and W2 samples were reasonably well-matched, the enlarged sample size across both offline and online channels meant there were some differences

In order to ensure an entirely valid comparison wave-on-wave, we applied a very minor weight to the total base to ensure an equitable balance between East Midlands Trains and Cross Country and between F2F and online, which is reflective of the first two waves of fieldwork.

This will ensure a constant 60:40 split between East Midlands Trains and CrossCountry and 67:33 between F2F and online. These weights will be applied for all future waves, to maintain comparability

As a result of the weighting applied, some W1 scores shown in this report are marginally different (1-2 percentage points) from those shown in the W1 report

## Notes on benchmark comparisons

Within the report, we have made comparisons to two previous research projects Transport Focus has undertaken to understand the impact of engineering works – Bath Spa in 2015 and London Waterloo in 2016-17. While these provide a useful benchmark by which to analyse the results for the engineering works at Derby, it is worth noting that there are a number of differences across each project, including:

- 1) **Passenger type composition** – London Waterloo for instance had a much higher proportion of commuters in its sample, reflective of the type of passengers using the station.
- 2) **F2F vs. online composition** – this will not be entirely consistent across each project, as this is dependent on the agreed sampling plans, number of specific routes targeted, responses rates and the resources available from TOC databases
- 3) **Timings for each wave** – whilst each project involved multiple waves of fieldwork, they are not entirely consistent regarding the amount of time between waves and the length of time from each wave to the actual period of works. A summary of this is provided below:

|                                | Fieldwork Dates |                 |                             |            | Date of works / station impact |
|--------------------------------|-----------------|-----------------|-----------------------------|------------|--------------------------------|
|                                | W1              | W2              | W3                          | W4         |                                |
| Bath Spa - 2015                | 20 Mar - 2 Apr  | 5 - 18 Jun      | 22 - 31 Jul +<br>4 - 14 Aug | -          | 18 - 31 Jul and 1 - 31 Aug     |
| London Waterloo -<br>2016/2017 | 23 Nov - 9 Dec  | 22 Feb - 12 Mar | 19 May - 4 Jul              | 9 - 27 Aug | 5 - 28 Aug                     |
| Derby - 2017/18                | 29 Nov - 14 Dec | 8 Feb - 3 Mar   | early - mid May             | July - Oct | 22 Jul - 8 Oct                 |

*N.B. Bath Spa W2 much closer to the works than London Waterloo and Derby*

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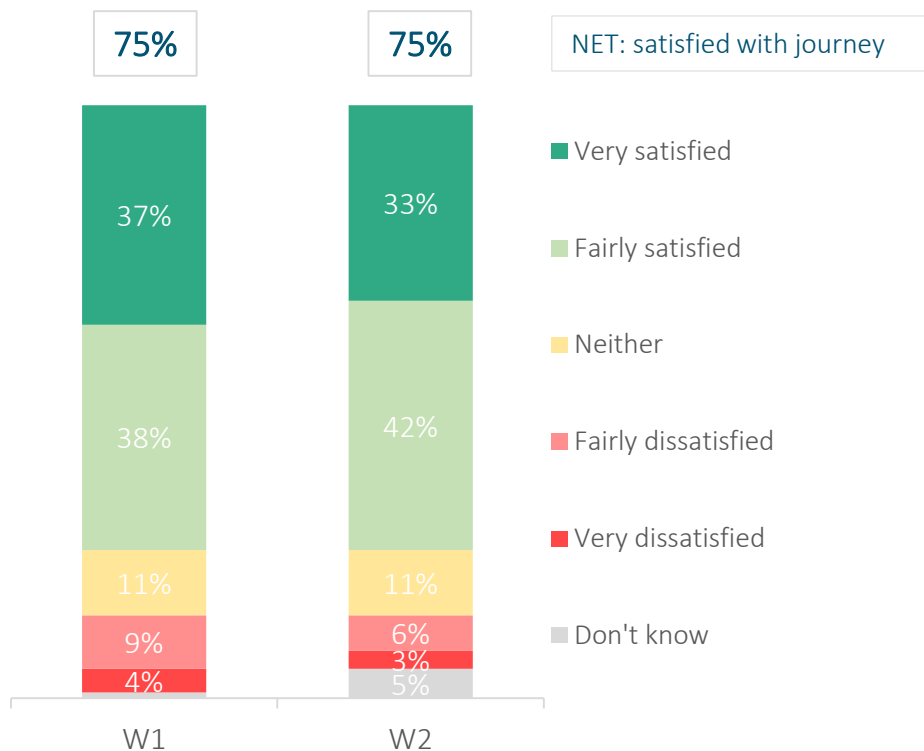
## SECTION 2

### Today's journey

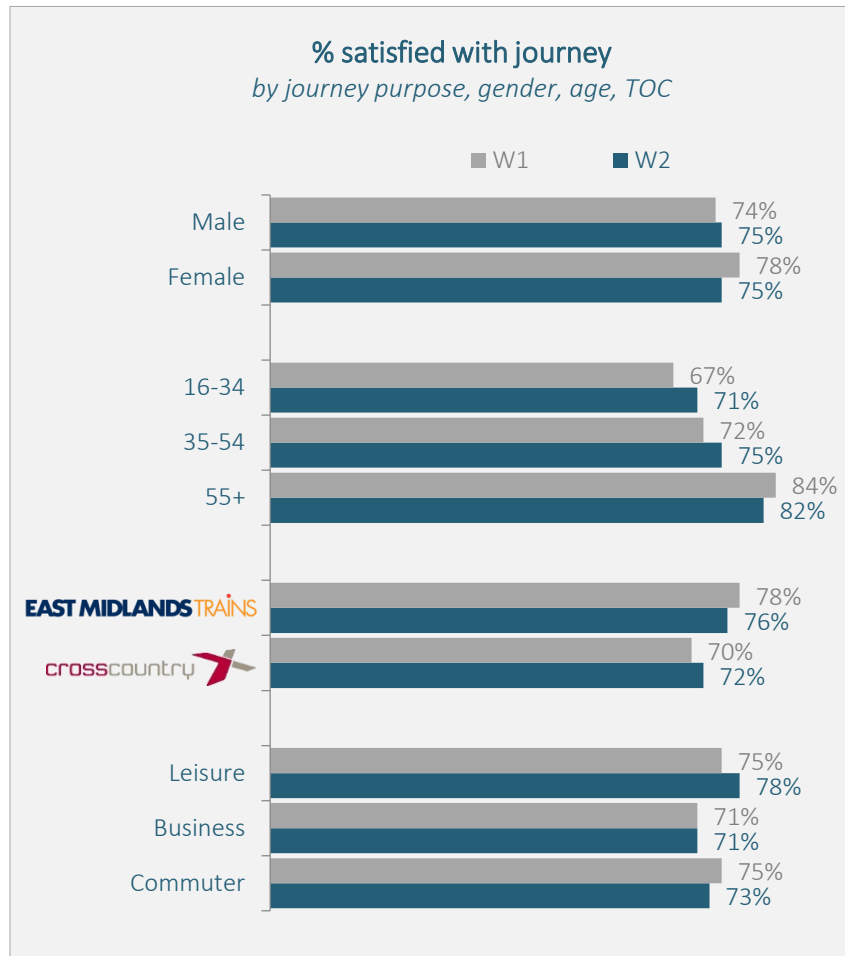
# Today's journey – satisfaction

As in W1, three quarters of passengers are satisfied with their overall journey. Satisfaction remains higher amongst older age groups, especially 55+

## Satisfaction with journey



**Autumn 2017 NRPS comparison scores**  
 EMT London building block – 86%  
 EMT Local building block – 90%  
 XC (North-South, Scotland and North East) – 86%

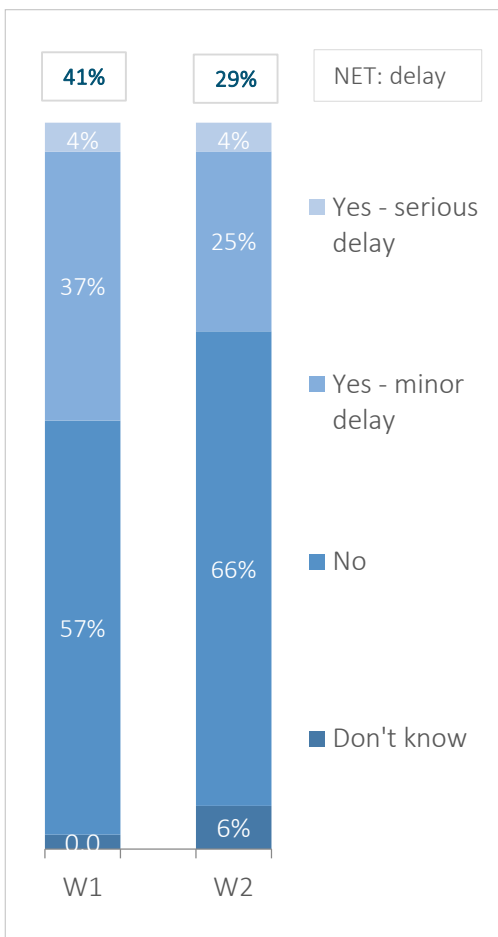




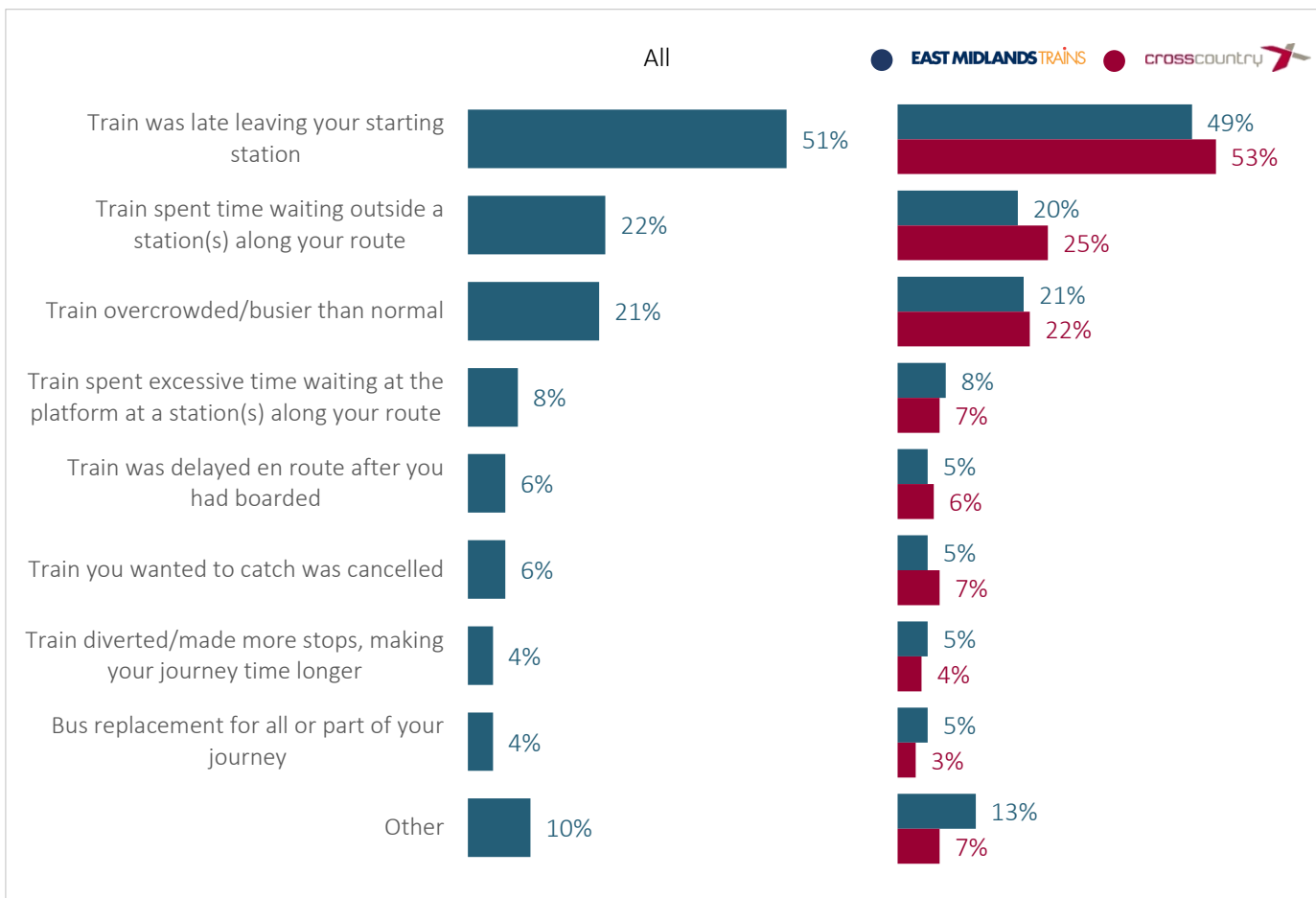
## Today's journey – type of disruption

Fewer passengers had experienced a delay or disruption on their journey this wave (albeit this has not translated to higher satisfaction). Leaving late was by far the most common form of delay for passengers of both services, followed by time spent waiting outside a station and overcrowding

Delays or disruption experienced



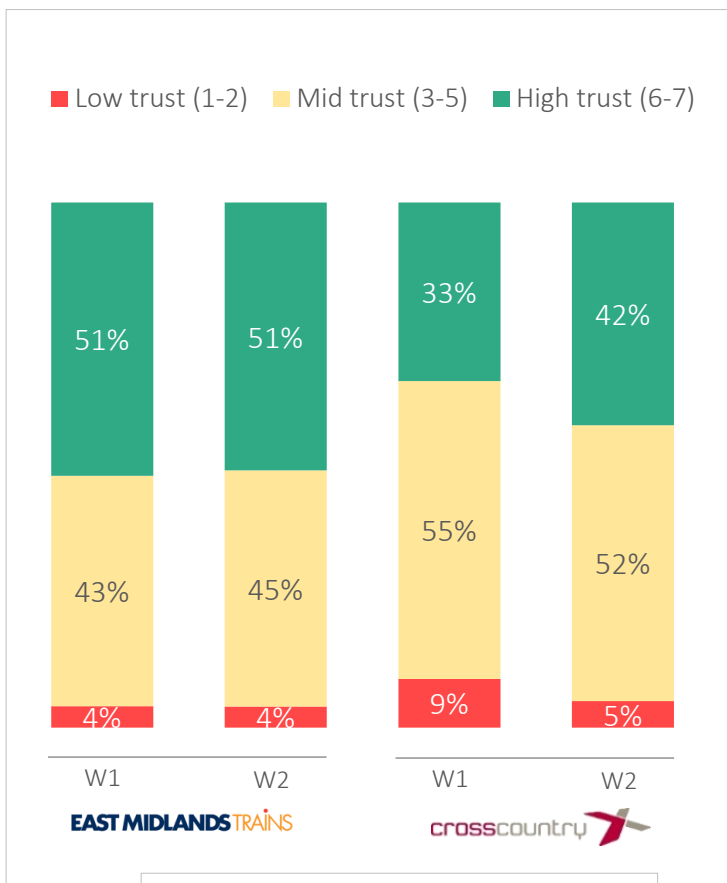
Type of delays or disruption (asked in W2 only)



# Today's journey – trust in train operator

Passenger trust in CrossCountry has increased significantly in W2, albeit this is still slightly lower than for East Midlands Trains' passengers. Trust remains greater amongst those aged 55+

Trust – all passengers

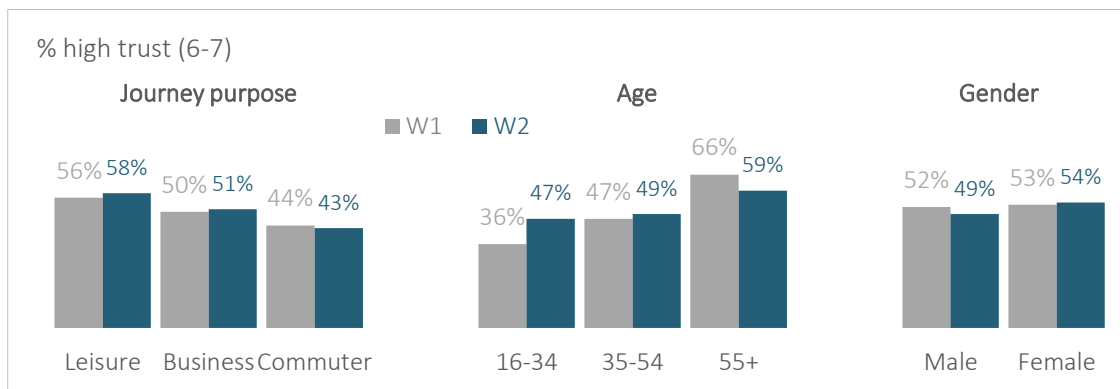


2014 Trust Survey comparison (% high trust)

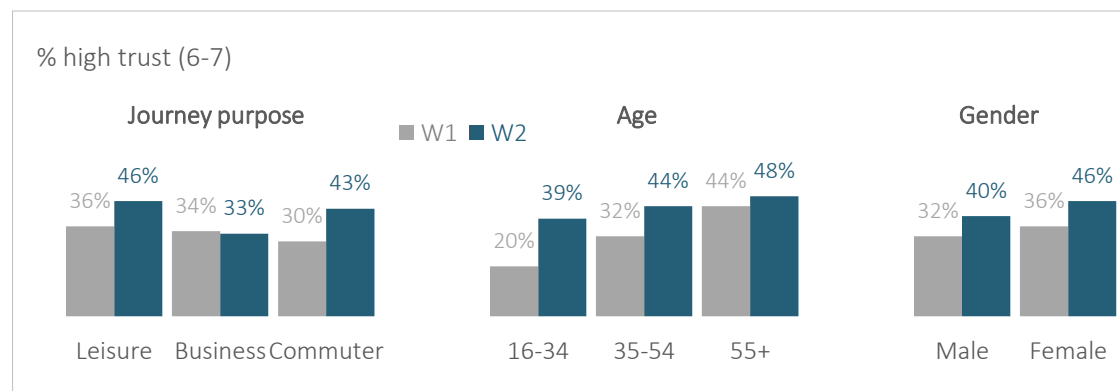
East Midlands Trains – 39%

CrossCountry – 34%

Trust in EAST MIDLANDS TRAINS by subgroup



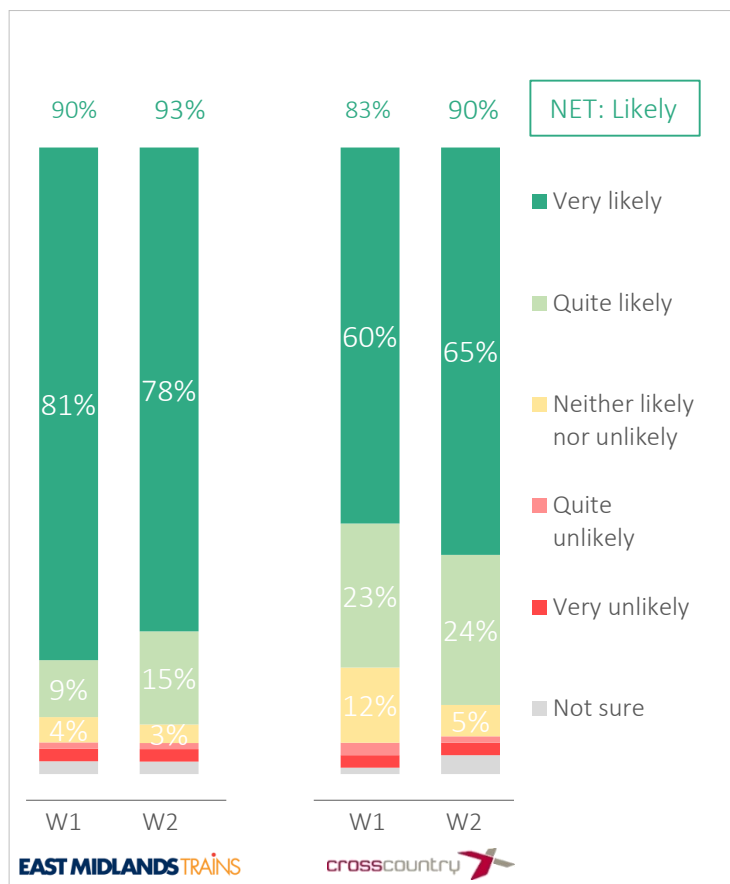
Trust in crosscountry by subgroup



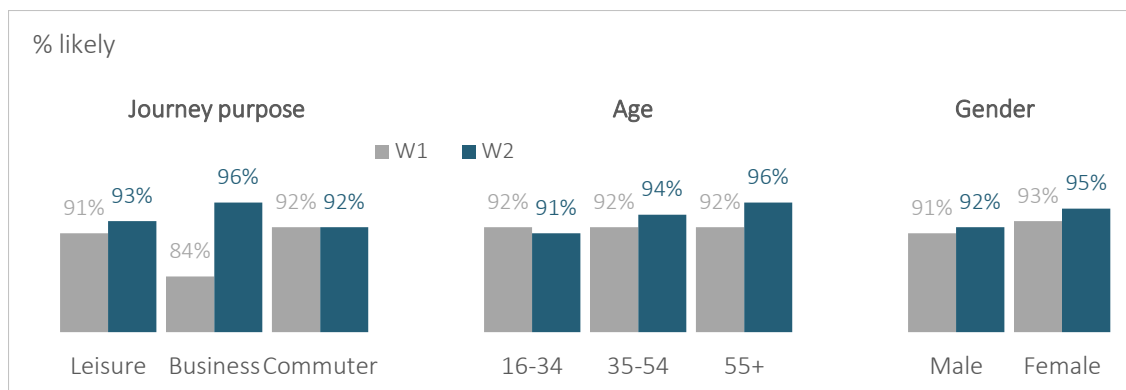
# Likelihood to use train operator in the future

Almost all passengers (nine in ten) are likely to travel using East Midlands Trains or CrossCountry again in the future, consistent across all sub-groups

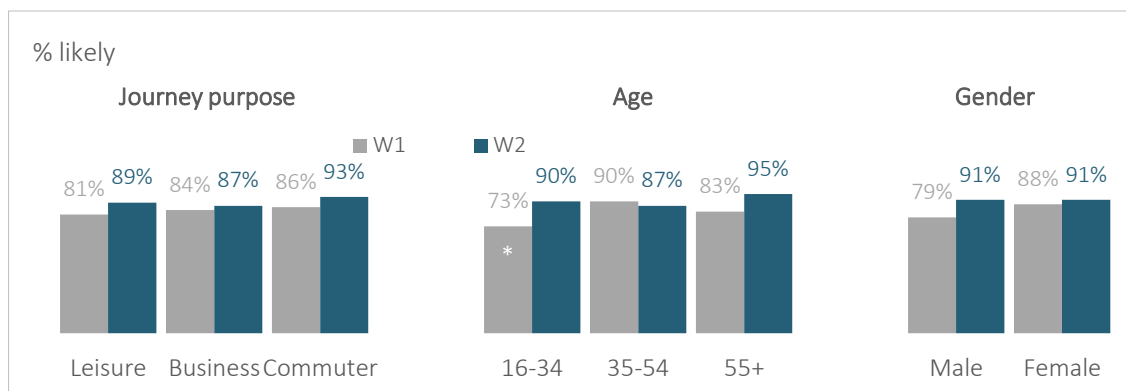
Likelihood to re-use – all passengers



Likelihood to use EAST MIDLANDS TRAINS by subgroup



Likelihood to use crosscountry by subgroup



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## SECTION 3

### Awareness and understanding of the resignalling works

# Awareness of resignalling works

Awareness of the works has increased by almost twenty percentage points in W2 – this uplift is similar to that experienced for Bath Spa, but behind that of Waterloo. Awareness remains highest by far amongst commuters, with this doubling in W2, as well as passengers responding to the survey online

Based on all respondents



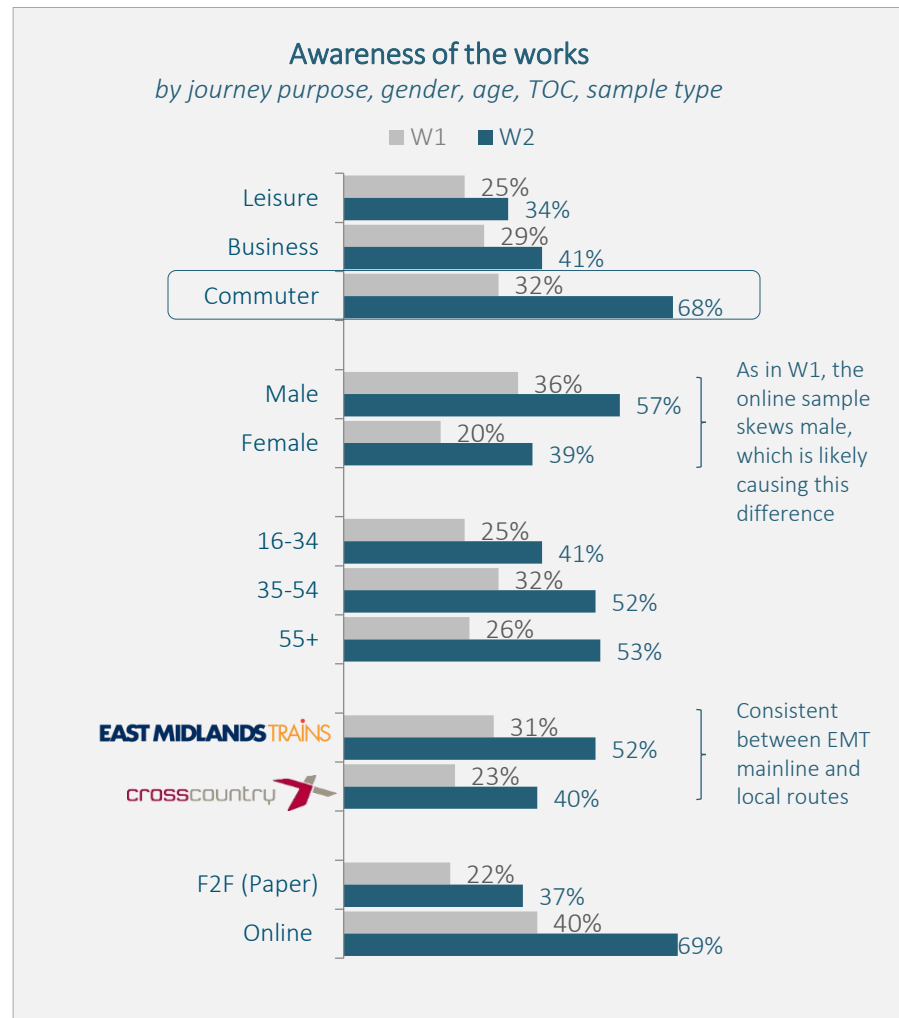
# 47%

+19% vs. W1  
(W1 = 28%)

of passengers are aware of the planned resignalling works



| Benchmarks      | W1  | W2  |
|-----------------|-----|-----|
| Bath Spa        | 42% | 67% |
| London Waterloo | 41% | 81% |



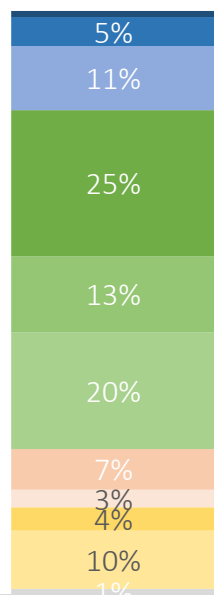
## When found out/would expect to be informed

Passengers have typically found out about the works within the last month. Amongst those aware of the works, this exceeds expectations as to when they want to find out in advance of the work starting. Those currently not being reached actually want to find out sooner



### When found out

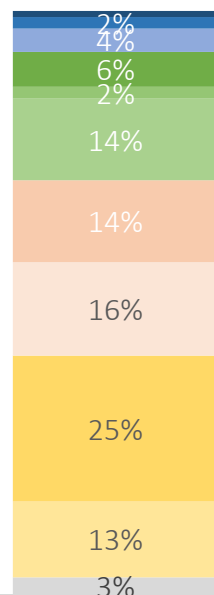
(all aware)



W2

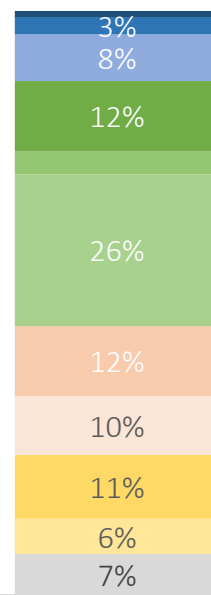
### When would expect to find out

(all aware)



W2 - All aware

(all not aware)



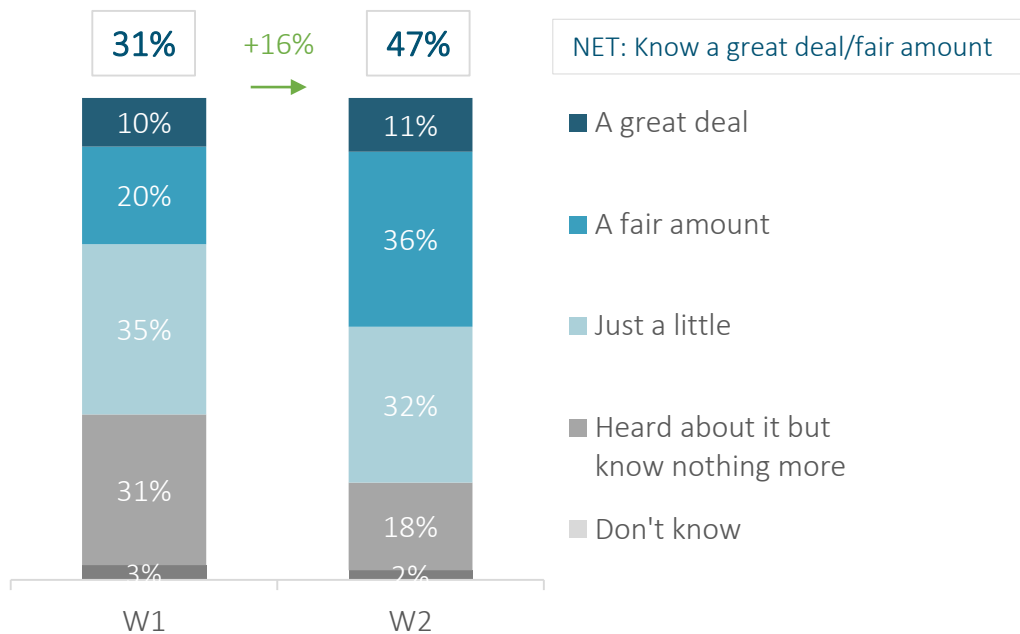
W2 - not aware

- Today / on the day they start
- Less than a week ago / before they start
- About a week ago / before
- About 2 weeks ago / before
- About 3 weeks ago / before
- About a month ago / before
- About 1-2 months ago / before
- About 2-3 months ago / before
- About 3-6 months ago / before
- More than 6 months ago / before
- Don't know / before

# Level of knowledge about the works [prompted]

Among those aware, almost half now feel they know at least a fair amount about the works - this remains in line with the works at Bath Spa and above that of London Waterloo. Only one in ten claim to know a 'great deal', with level of knowledge now broadly consistent across journey purpose

## Based on all aware

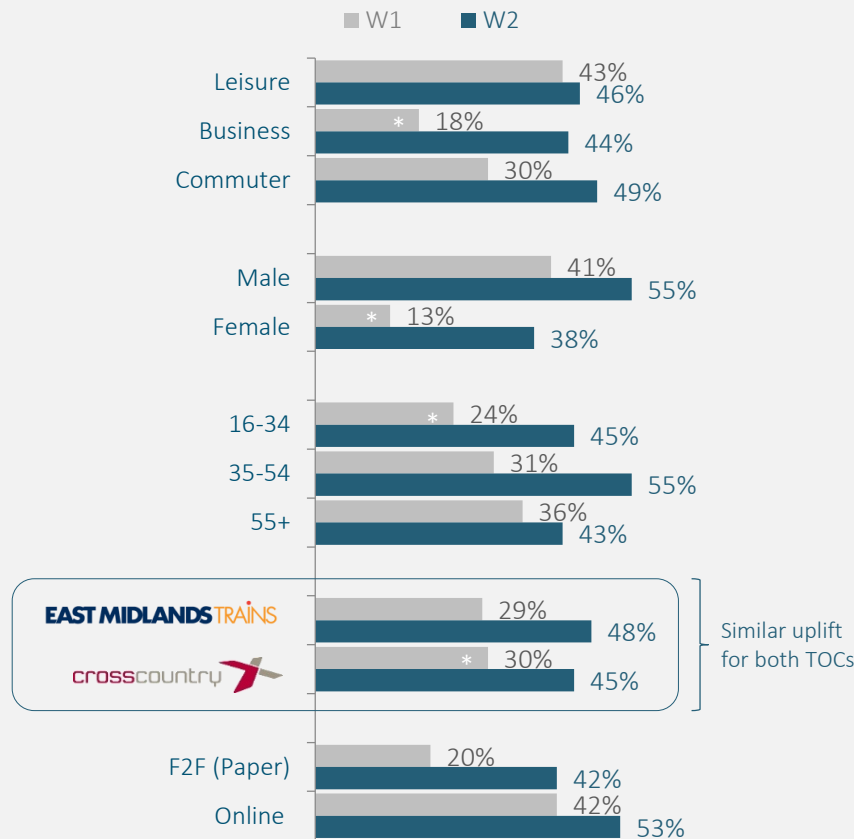


| Benchmarks      | W1  | W2  |
|-----------------|-----|-----|
| Bath Spa        | 34% | 49% |
| London Waterloo | 17% | 36% |



## Level of knowledge (% great deal/fair amount)

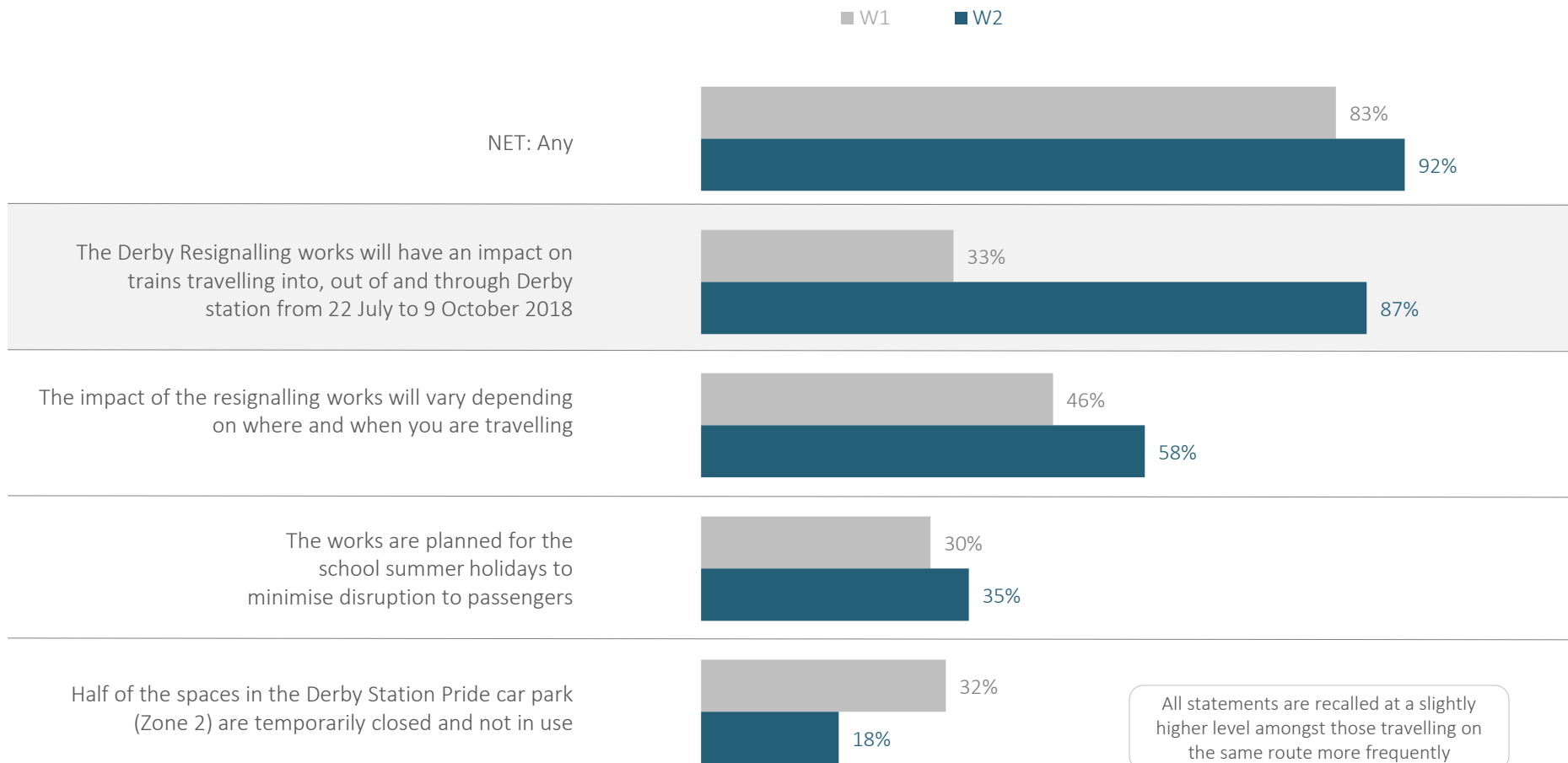
by journey purpose, gender, age, TOC, sample type



## Understanding about implications of the works

That the works will impact trains travelling to, from and through Derby between specific dates is now by far the most recalled statement about the works. Awareness that the works are planned for school summer holidays remains at one third, whilst awareness of car park space closures has fallen back

### Based on all aware

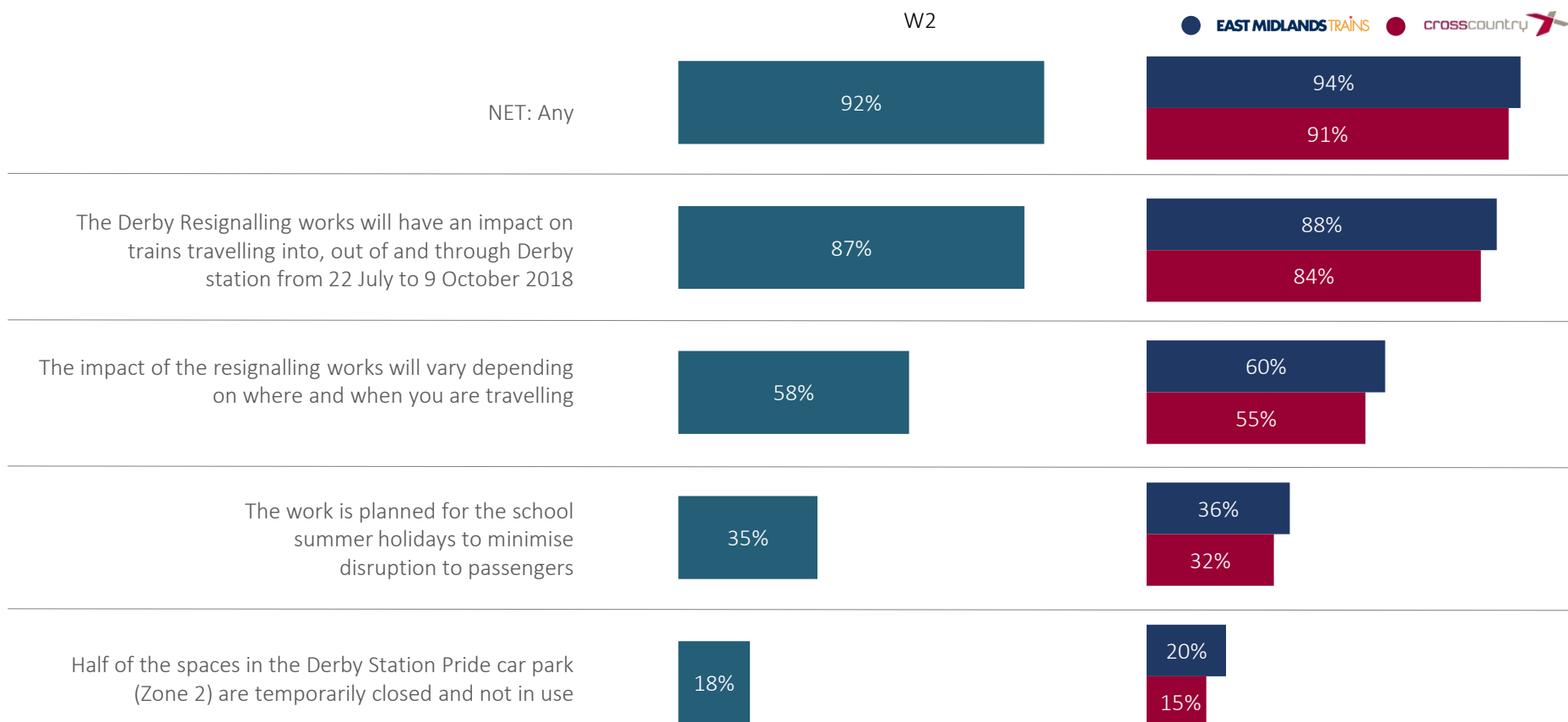




## Understanding about implications of the works – W2

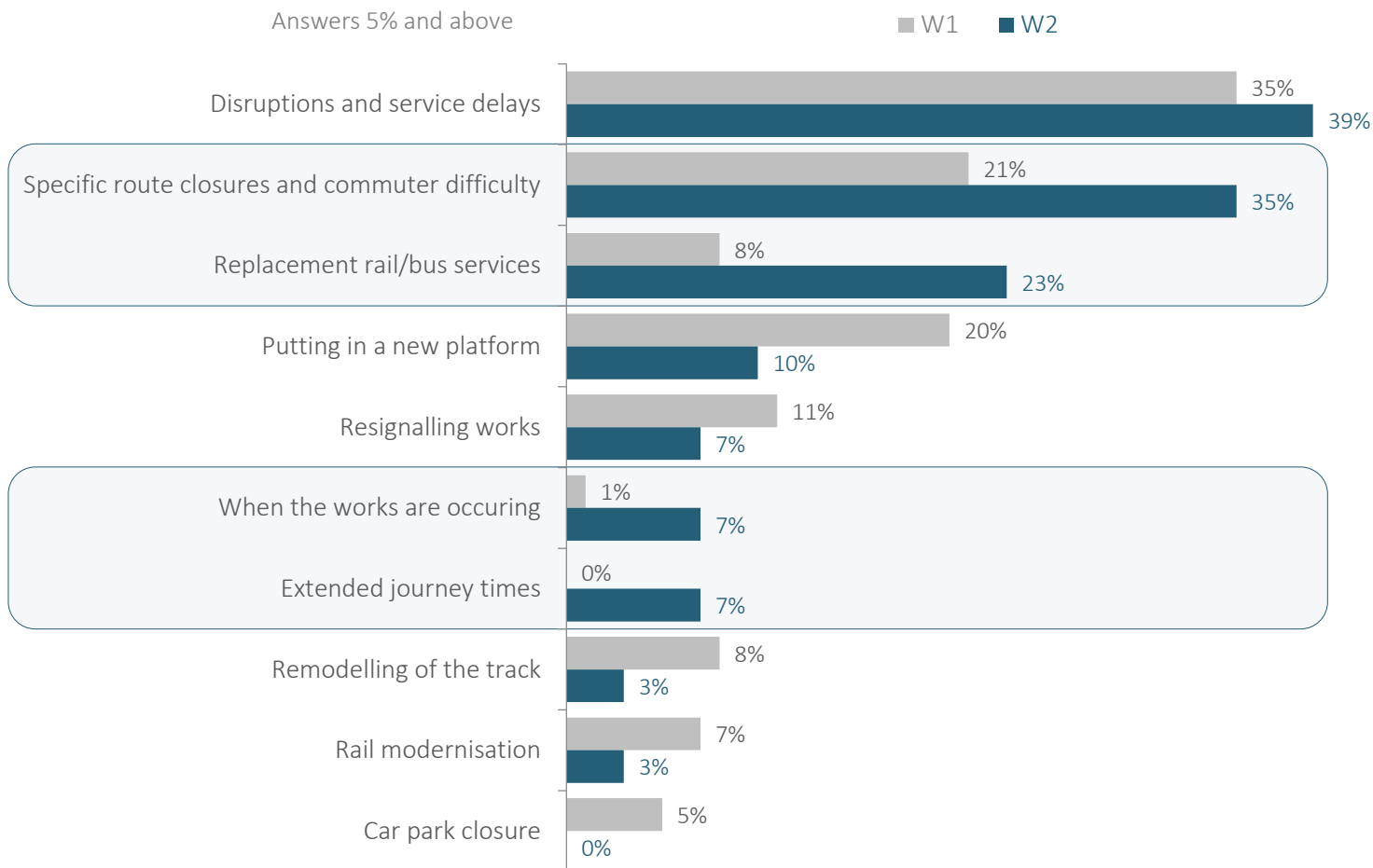
Awareness of all facts about the works is marginally higher amongst East Midlands Trains passengers than Cross Country

### Based on all aware



## What passengers know about the works [spontaneous]

Those aware of the works have a broader knowledge base than in W1, with significantly higher numbers mentioning specific routes closures, replacement services, extended journey times and actual dates of the works. Fewer mention the installation of the new platform



## What passengers know about the works [spontaneous]

Spontaneous verbatim comments

### Disruptions and service delays 39%

'I did quickly look at a brochure your staff handed to me on a recent visit. I understand there will be **delays/disruption/alternative forms of travel**'  
(EMT, Business)

'If I travel to London or for work to Birmingham, I'm **expecting major delays to my commute**'  
(EMT, Leisure)

'**Disruption to journeys** which start and end in Derby, or require interchanges'  
(XC, Business)

### Specific route closures and commuter difficulty 27%

'Network Rail are replacing an old network and signalling system in and around Derby. **Affecting all lines and routes around the Midlands and to London**'  
(XC, Commuter)

'Various route closures between July and October. **CrossCountry services diverted between Chesterfield and Burton**'  
(XC, Leisure)

'Reviewed detailed track and signalling plans and am **aware of likely changes to Belper-Derby services**'  
(EMT, Commuter)

### Bus replacement and alternative travel 23%

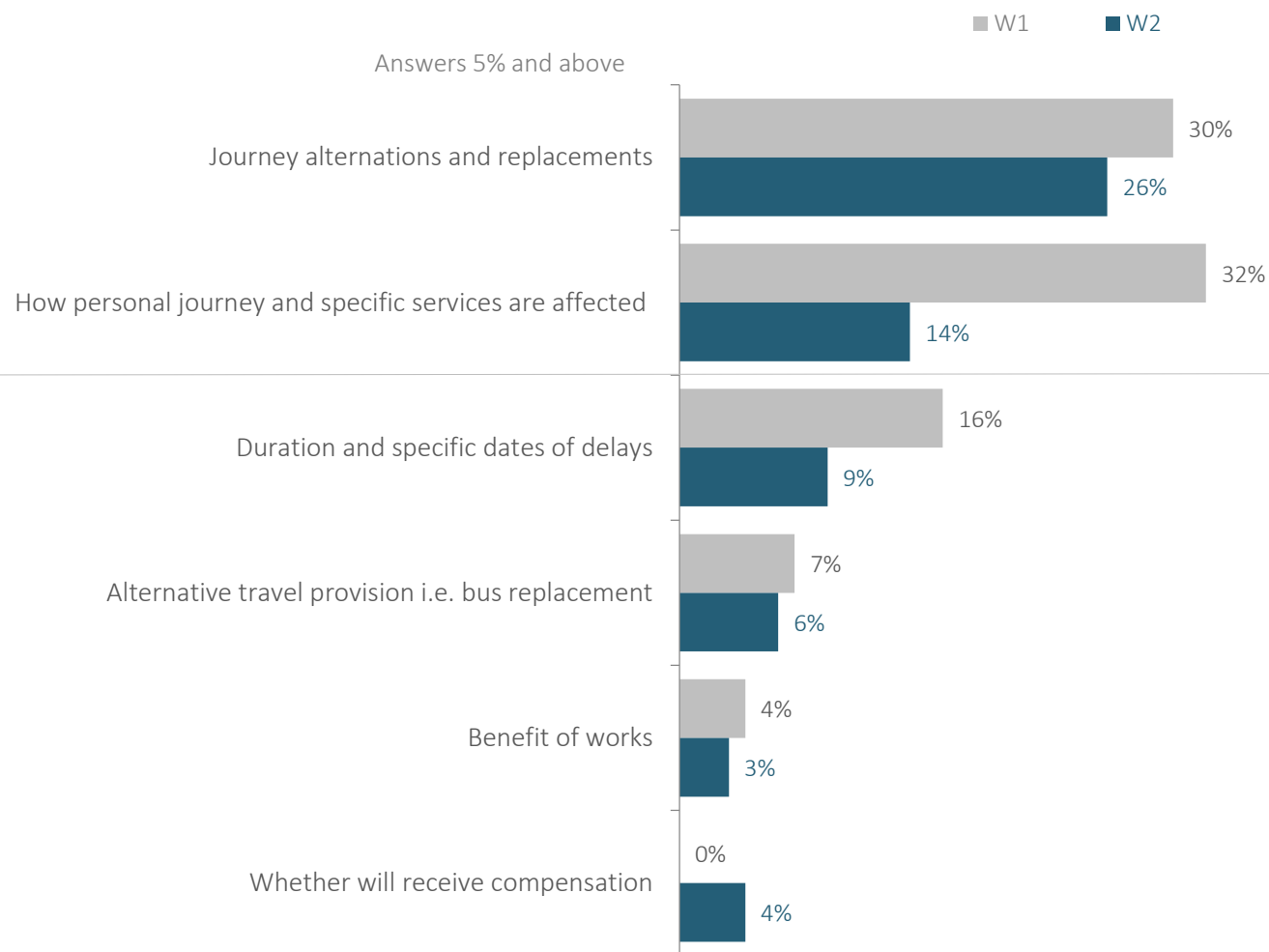
'There will be changed timetables and **replacement bus services** at differing parts of the stated period'  
(XC, Leisure)

'Major track relaying work around Derby. My service will reach Tutbury and Hatton but the **bus service will operate from Uttoxeter**'  
(EMT, Commuter)

'Lines are being reconfigured to improve bottlenecks in and out of Derby. Trains won't call at Derby for some of that time and **bus replacement services will be in place**'  
(EMT, Commuter)

## What else would passengers like to know [spontaneous]

Additional information needs amongst those aware are lower this wave, reflective of a stronger base of knowledge. Key information needs remain how specific journeys and service will be affected, and what replacement services will be running, with a handful now mentioning compensation



## What else would passengers like to know [spontaneous]

Spontaneous verbatim comments

### Journey alterations & replacements

26%

'Replacement buses timetable including how long my Derby-Sheffield journey will now take'  
(EMT, Commuter)

'Alternatives to using Derby station to get to Leeds'  
(XC, Commuter)

'Timetables! How long will my journey take?'  
(EMT, Business)

'Will buses run to the set timetables or will they be more frequent to compensate for longer journey times?'  
(EMT, Commuter)

### Specific route closures and commuter difficulty

14%

'Exactly how it will affect my journey, where I will need to use a bus instead, how long my journey is going to take and much more detail of the practicalities'  
(EMT, Commuter)

'The implications for my weekly journey between Birmingham and Wakefield'  
(XC, Commuter)

'When it's closed and best alternative routes and timings'  
(EMT, Commuter)

'Where do I catch CrossCountry trains for the South West?'  
(XC, Commuter)

### Duration and specific dates of delays

9%

'I would like to know as time goes on if there will be any changes to the planned disruptions'  
(EMT, Leisure)

'Likely length of delay and whether better or worse on particular days or times'  
(EMT, Commuter)

'The details of diversions and increase to journey times, plus which dates are affected'  
(XC, Leisure)

'A timetable of what routes are affected and when for all train companies'  
(EMT, Business)

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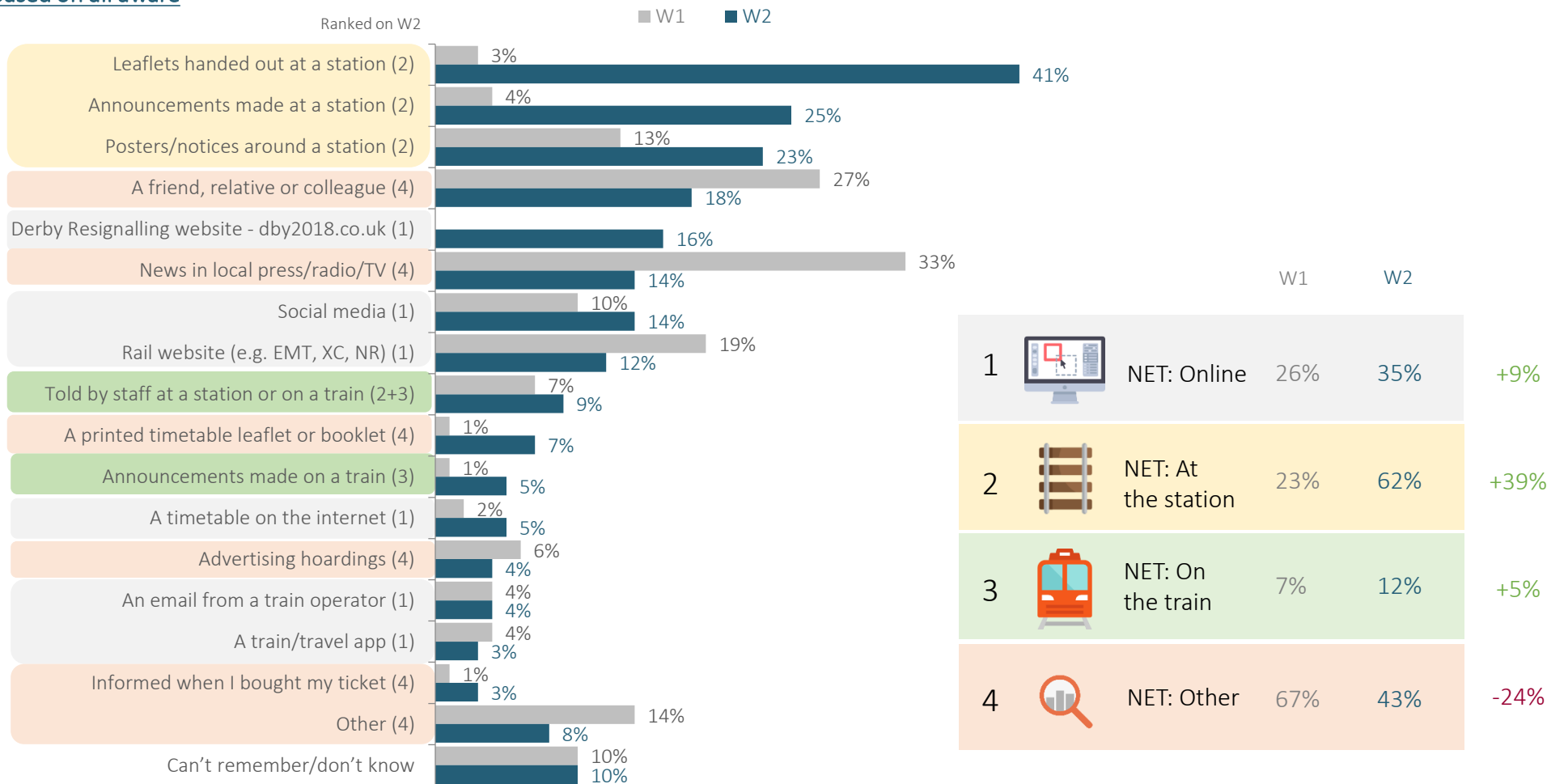
## SECTION 4

# Information channels

# How found out about the resignalling works

Station information is now the dominant driver of awareness, particularly leaflets, where as word of mouth and local press are no longer the drivers. One in five of those aware found through the dedicated Derby Resignalling microsite, higher than any other online channel

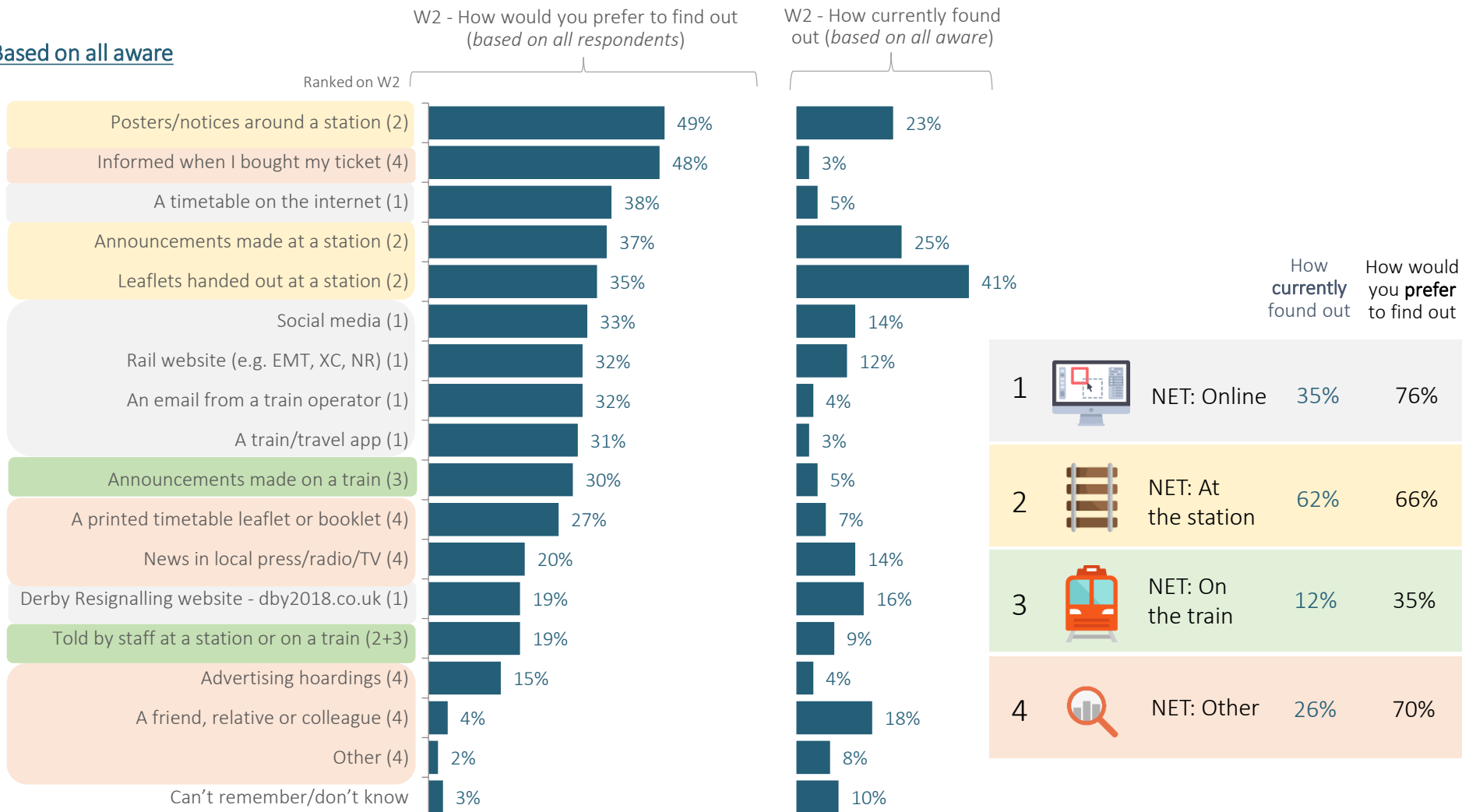
## Based on all aware



# How found out about the resigalling works

Station leaflets, announcements and posters are the key awareness channels currently, and are amongst passenger’s preferred options. However there is room to dial up information when purchasing a ticket, and through e-mail and apps

## Based on all aware

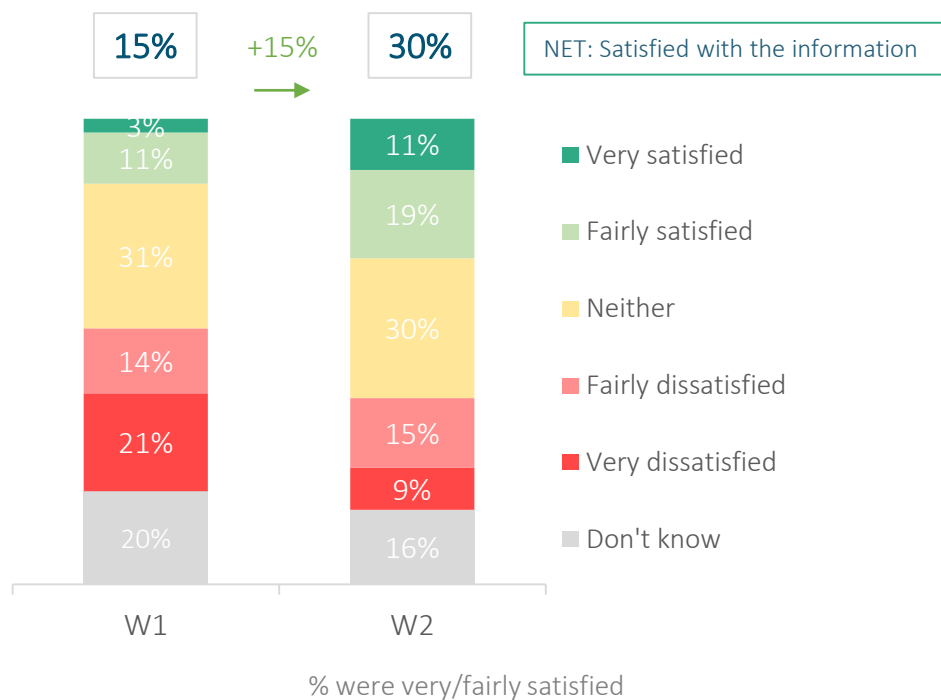




# Satisfaction with information

Satisfaction with the information being provided has doubled this wave, and remains almost on a par with that seen for Bath Spa and London Waterloo at a similar stage. The proportion dissatisfied has also fallen, albeit this is still a quarter. East Midlands Trains passengers are slightly more satisfied than Cross Country

## Based on all respondents

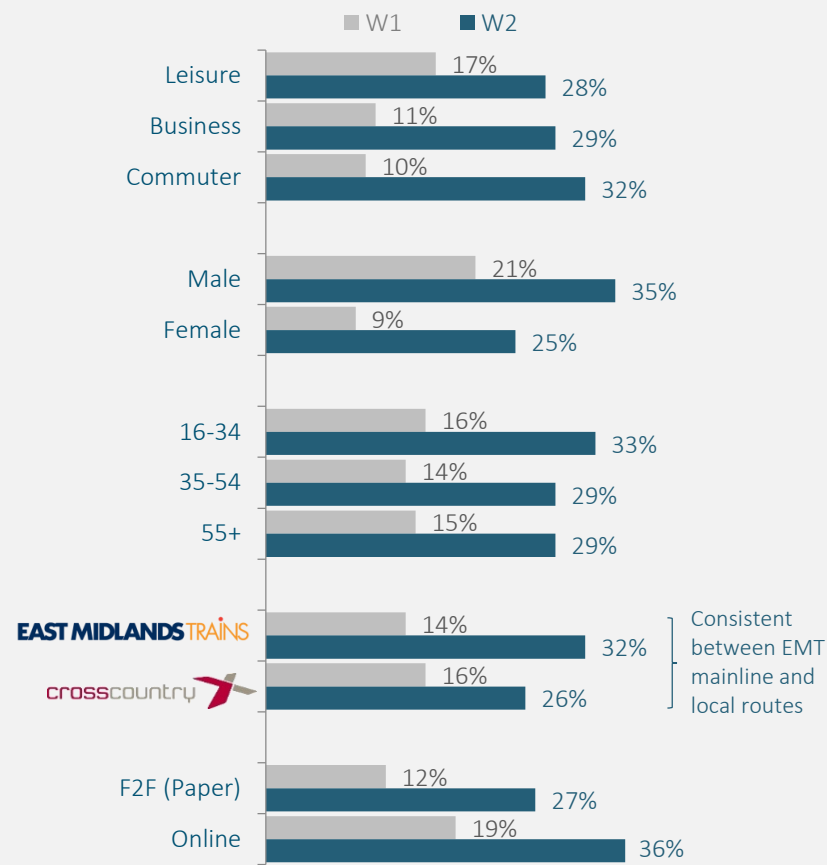


| Benchmarks      | W1  | W2  |
|-----------------|-----|-----|
| Bath Spa        | 19% | 35% |
| London Waterloo | 16% | 35% |



## Satisfaction with information (% very/fairly satisfied)

by journey purpose, gender, age, TOC, sample type



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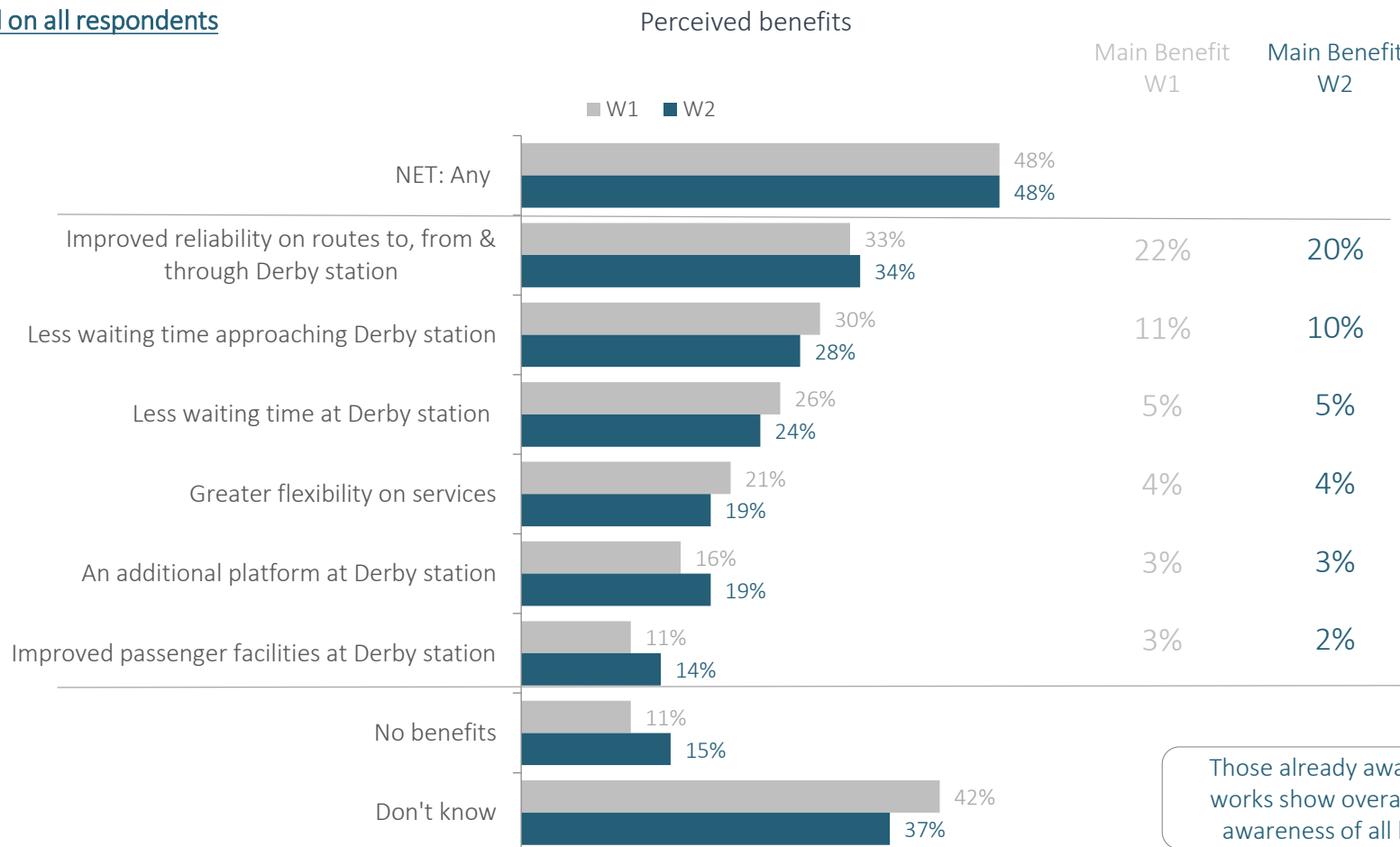
## SECTION 5

### Perceived impact of works and level of support

## Perceived benefits and main benefit of the works [prompted]

The benefits of the works are cutting through only at the level seen for Wave 1 – improved reliability of services to, from and through Derby is still perceived to be the most significant, followed by less waiting time both approaching and at Derby station remain the key benefits

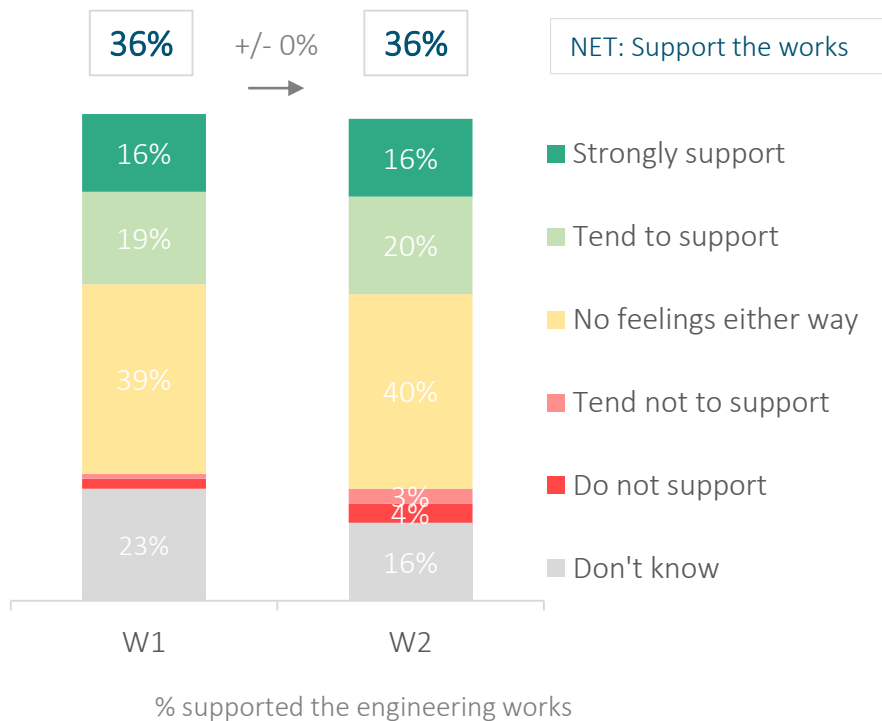
### Based on all respondents



# Levels of support for the works

Support for the works remains stable at one third of passengers, albeit this remains behind levels seen for Bath Spa and London Waterloo. Support is higher amongst older passengers and those who completed a pen and paper postal return

## Based on all respondents

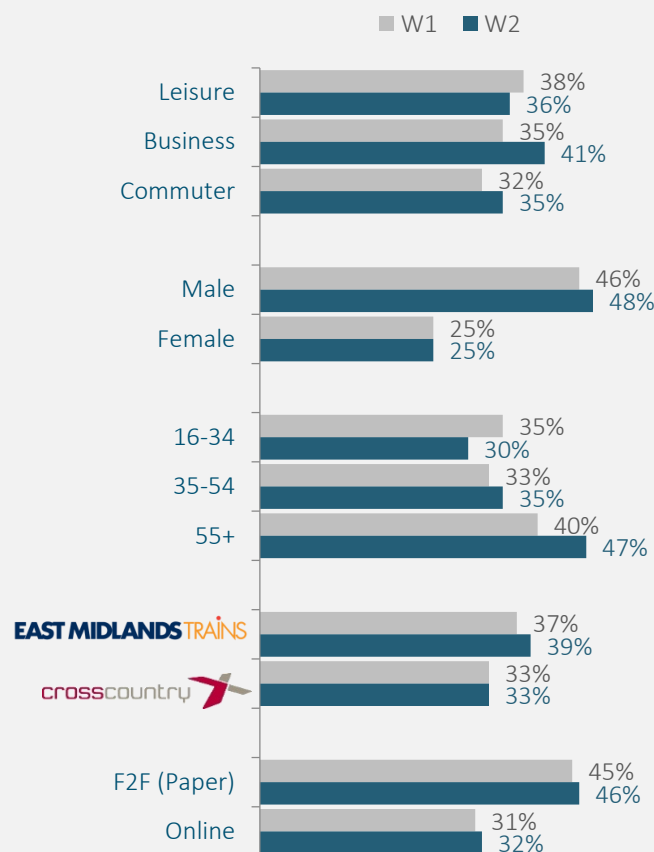


| Benchmarks      | W1  | W2  |
|-----------------|-----|-----|
| Bath Spa        | 46% | 54% |
| London Waterloo | 69% | 69% |



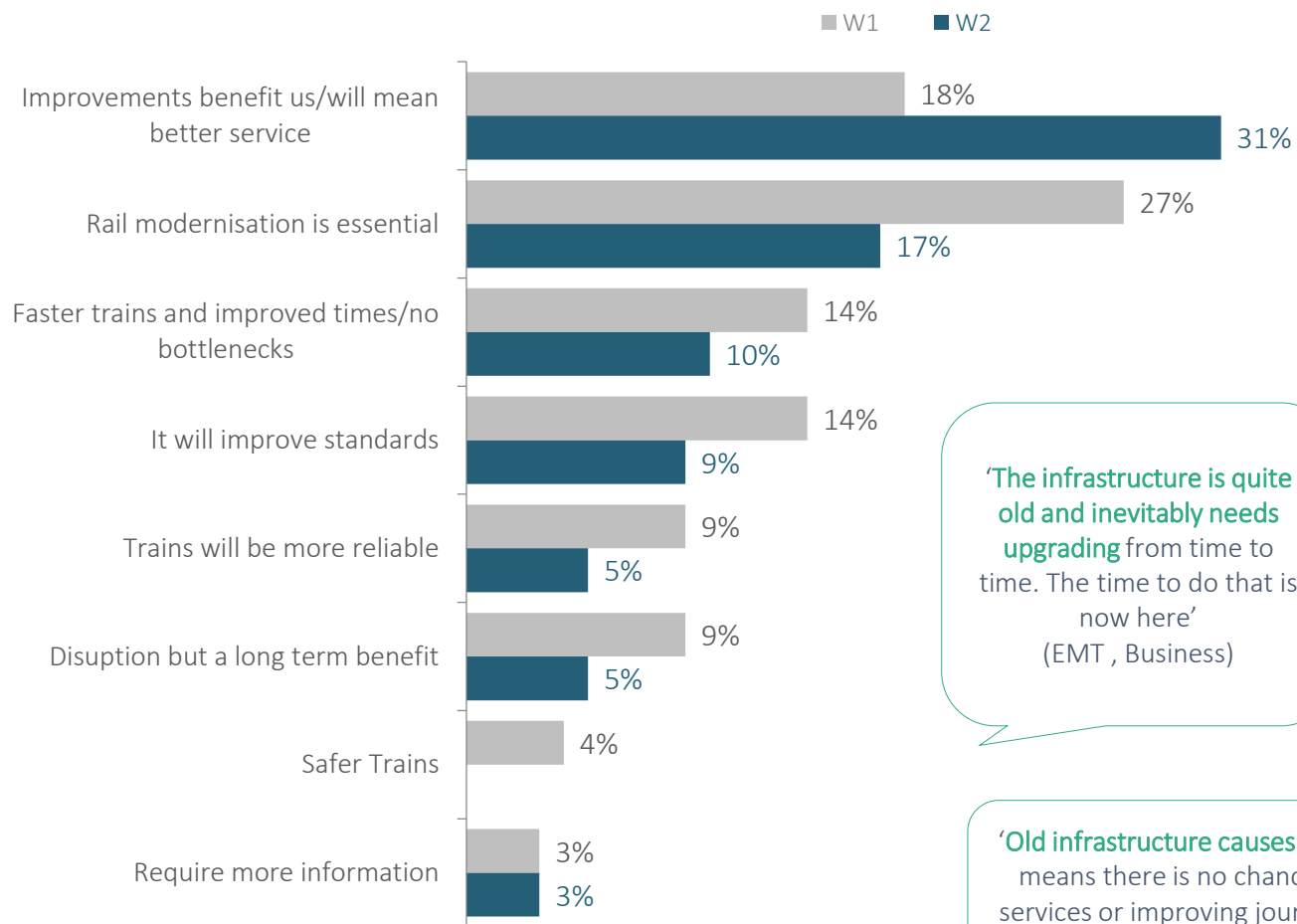
## Levels of support (% strongly/tend to support)

by journey purpose, gender, age, TOC



## Why support the works [spontaneous]

Those who support the works are better able to articulate the actual benefits this wave, namely a better service for passengers



### W2 verbatim comments

'Anything to make **journeys quicker and more efficient**'  
(EMT, Leisure)

'**The infrastructure is quite old and inevitably needs upgrading** from time to time. The time to do that is now here'  
(EMT, Business)

'**Derby has been a congestion nightmare for years**, hopefully this will improve everything'  
(XC, Leisure)

'**Old infrastructure causes delays** and means there is no chance of new services or improving journey times'  
(XC, Leisure)

## Why do not support the works [spontaneous] – W2

Amongst the minority of passengers who do not support the works, lack of information around the service benefits or general frustration about disruption are typically the driving factors. A few question how the works will help with issues such as overcrowding

7%

Do not support  
the works

'I don't really know what the work will involve and **how it will impact train services**'  
(XC, Leisure)

'I **don't know how it will improve my journey** from Tutbury'  
(EMT, Business)

'Don't know enough about it. There is too much reliance on website information being accessed and too **little thought given to printed information/timetables for routes** being actively distributed'  
(EMT, Leisure)

'**Not sure why the works are taking place** - perhaps if I understood why the works were happening and the benefit to the service overall, I would be more supportive'  
(XC, Business)

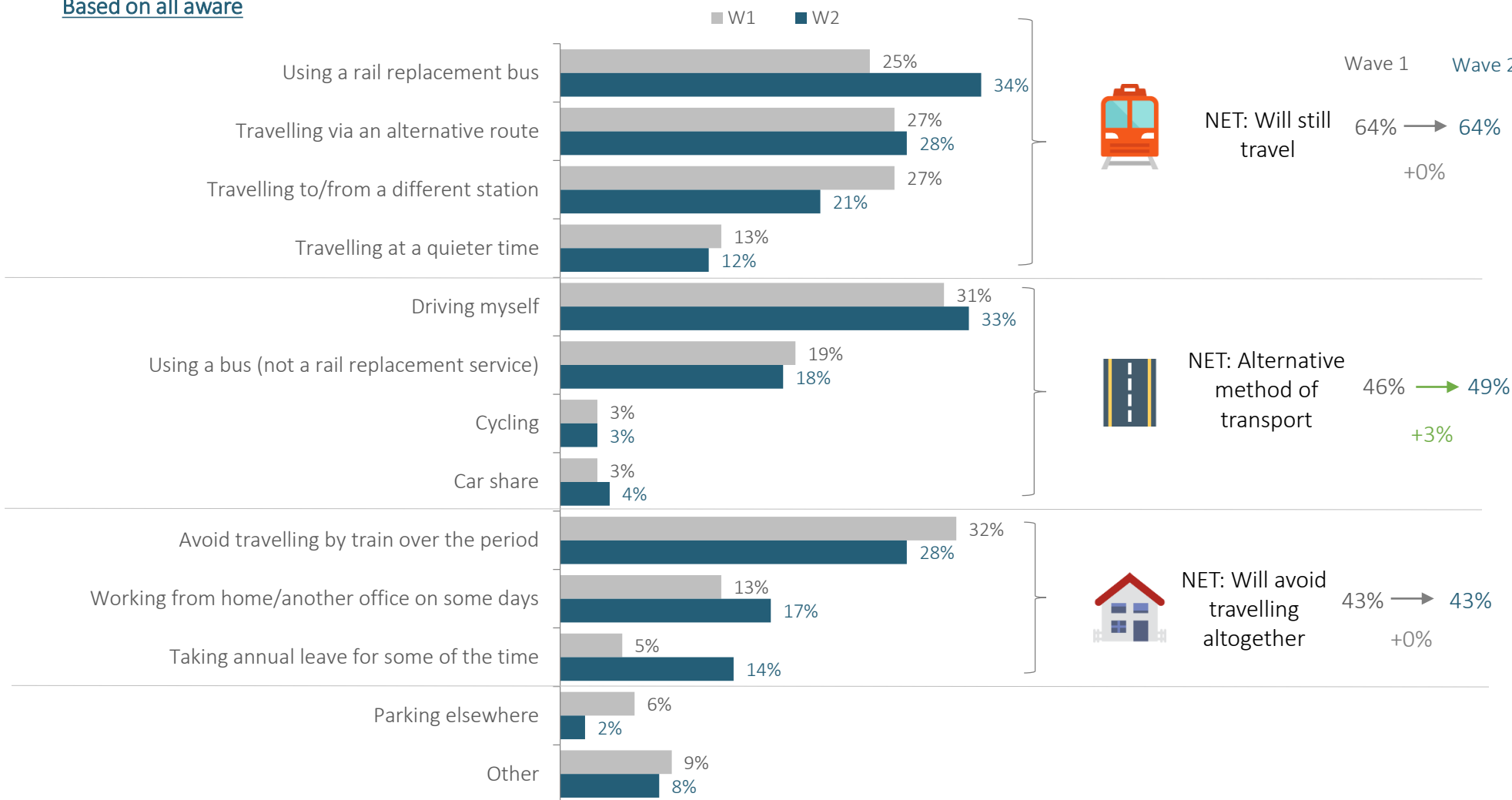
'**Complete disruption to me travelling to work** where I have been travelling for six years. I think they could have been upgraded with **less disruption**'  
(EMT, Commuter)

'**Train travel will still be expensive and cramped on board.** Engineering works will not change this'  
(EMT, Leisure)

## Action considered ahead of the works

The same proportion as W1 (one in four) are willing to avoid travelling altogether during the works if the service they usually use is affected. Half would consider using an alternative method transport, albeit two thirds would still consider travelling

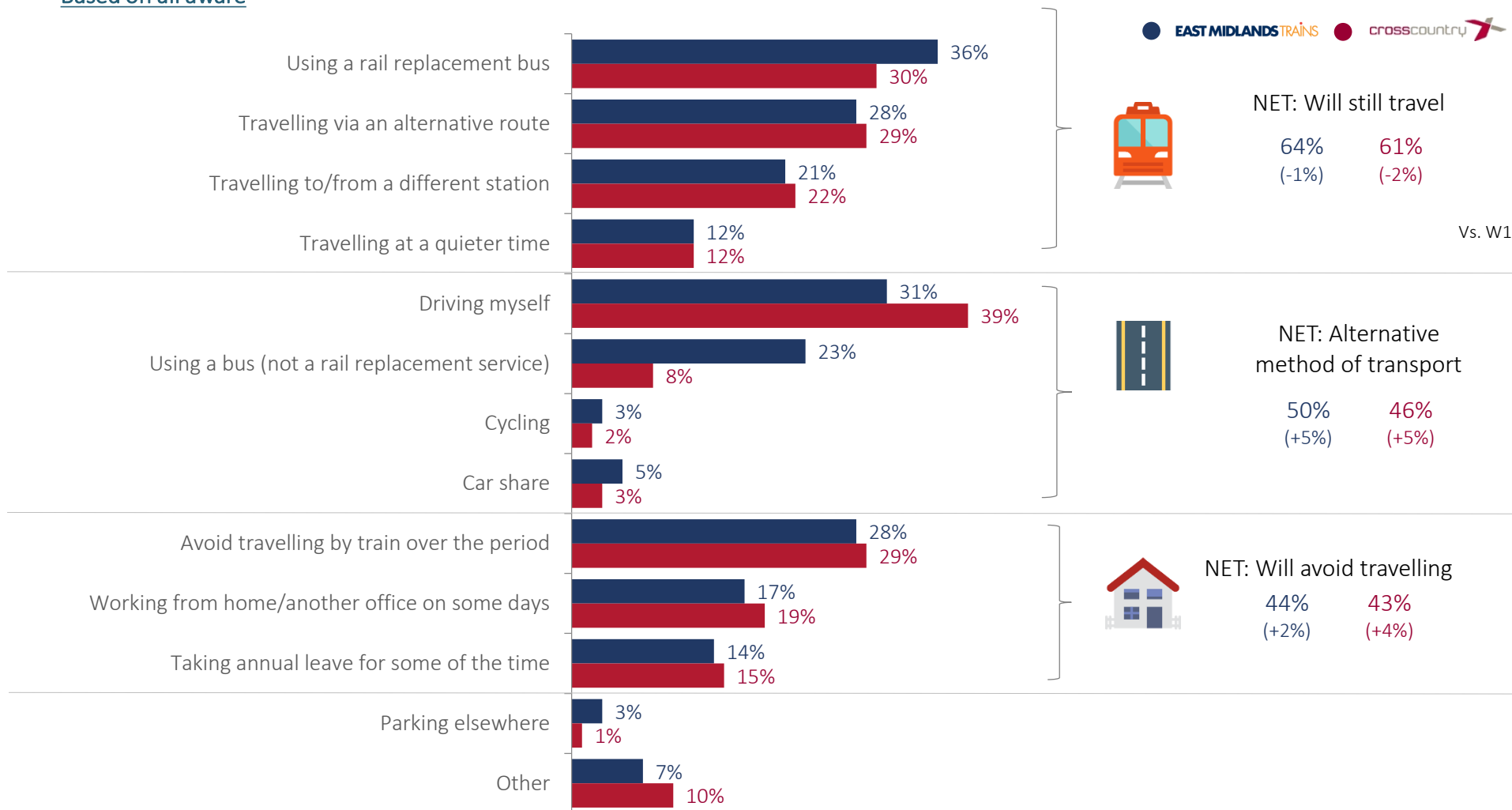
### Based on all aware



## Action considered ahead of the works (by train operator) – W2

Actions considered are largely consistent across East Midlands and CrossCountry passengers. However, East Midlands passengers are more likely to consider an alternative method of transport

### Based on all aware

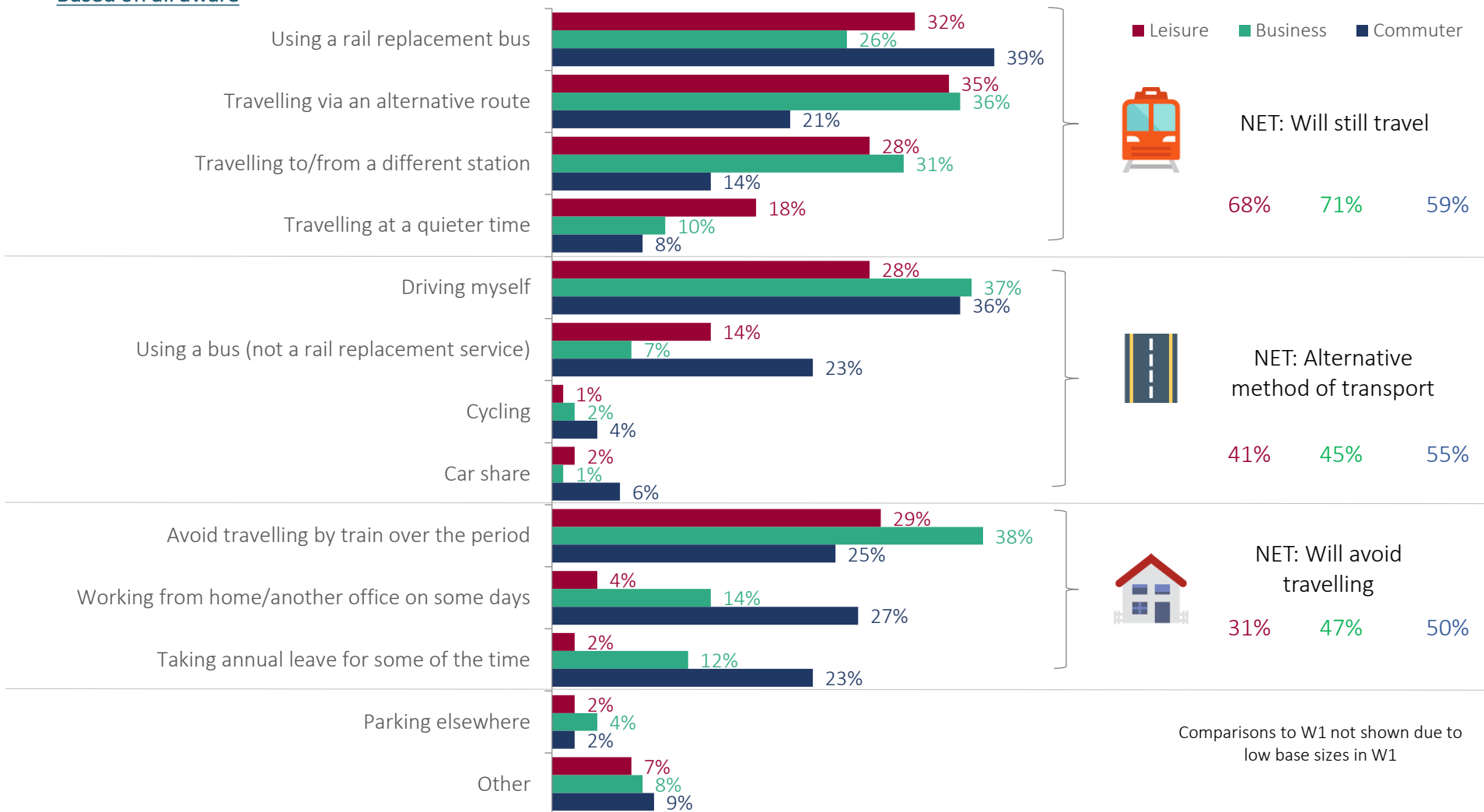




## Action considered ahead of the works (by journey purpose) – W2

The majority of commuters, leisure and business travellers are likely to still travel during the works if the service they use is affected

### Based on all aware



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# SECTION 6

## Key insights

## Key insights – W2

1

### **Awareness of the planned works has improved significantly, with almost half (47%) aware**

However, awareness remains lower than at a similar stage for London Waterloo, which experienced a greater uplift between the first two waves. Commuters have far greater awareness than business and leisure passengers, with this doubling in W2

2

### **Familiarity has also increased, with just under half (47%) claiming to know at least a fair amount about the works**

Top of mind knowledge around specific route closures and the need for replacement bus services is significantly higher this wave. When prompted, almost everyone is now aware of the broad dates of the works; however awareness of the deliberate placement during school holidays to minimise disruption remains at a third

3

### **Leaflets, announcements and posters at stations are the lead drivers of awareness (largely in line with preferences)**

Operators are now in control of the message sent out, with word of mouth and local press no longer driving awareness. Passengers expect to be kept informed through a variety of both online and offline sources – letting people know when they purchase their ticket would be particularly welcomed. 16% claim to have heard about the works through the Derby Resignalling website

4

### **Satisfaction with the information provided has doubled since the first wave**

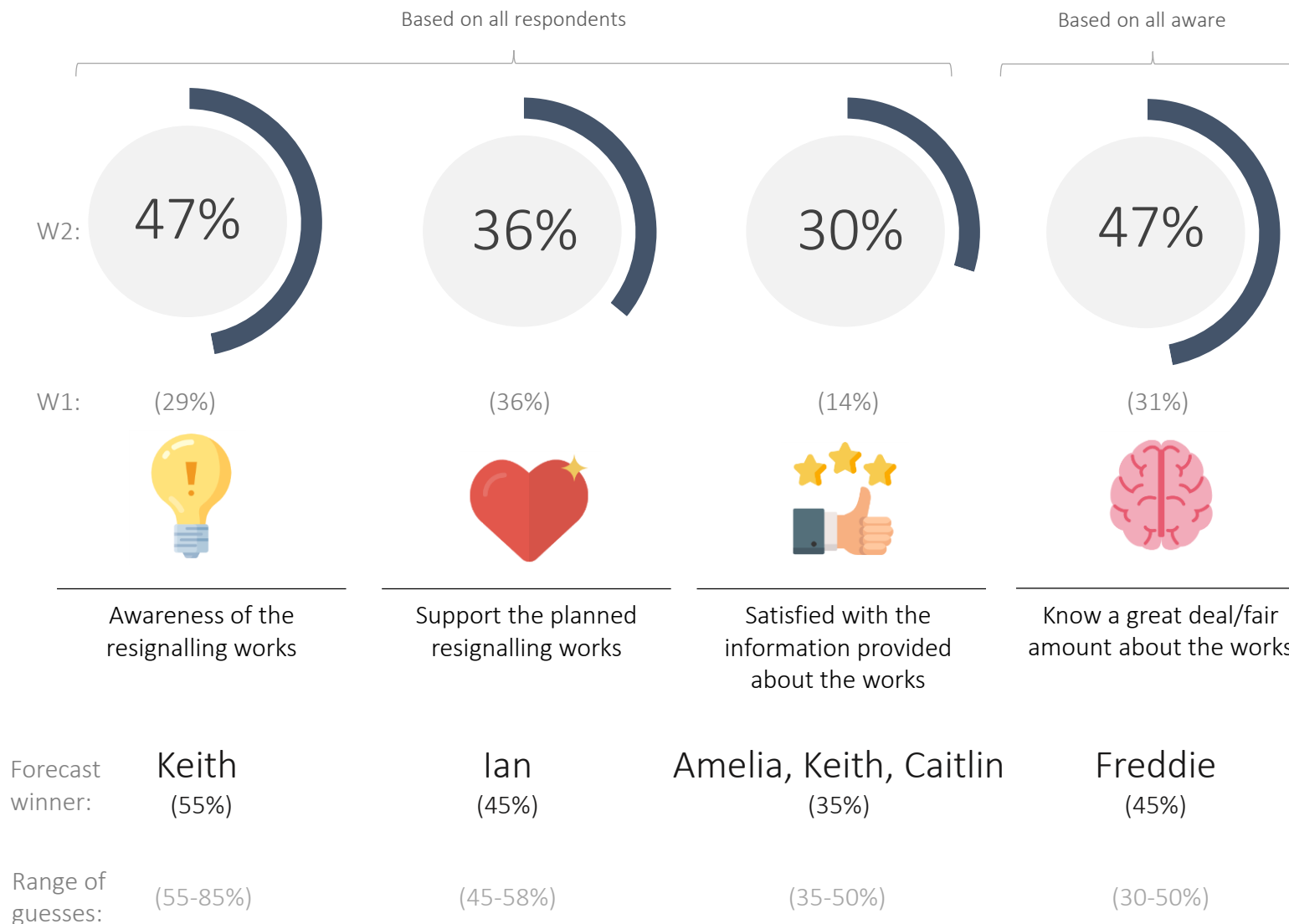
This is broadly consistent with the same stage during the works at Bath Spa and London Waterloo. Whilst lower than W1, a quarter of passengers are dissatisfied – there is a growing appetite for specific timetables detailing service alterations and revised journey times on specific routes, so that people can understand their travel options and the potential increase to their journey times

5

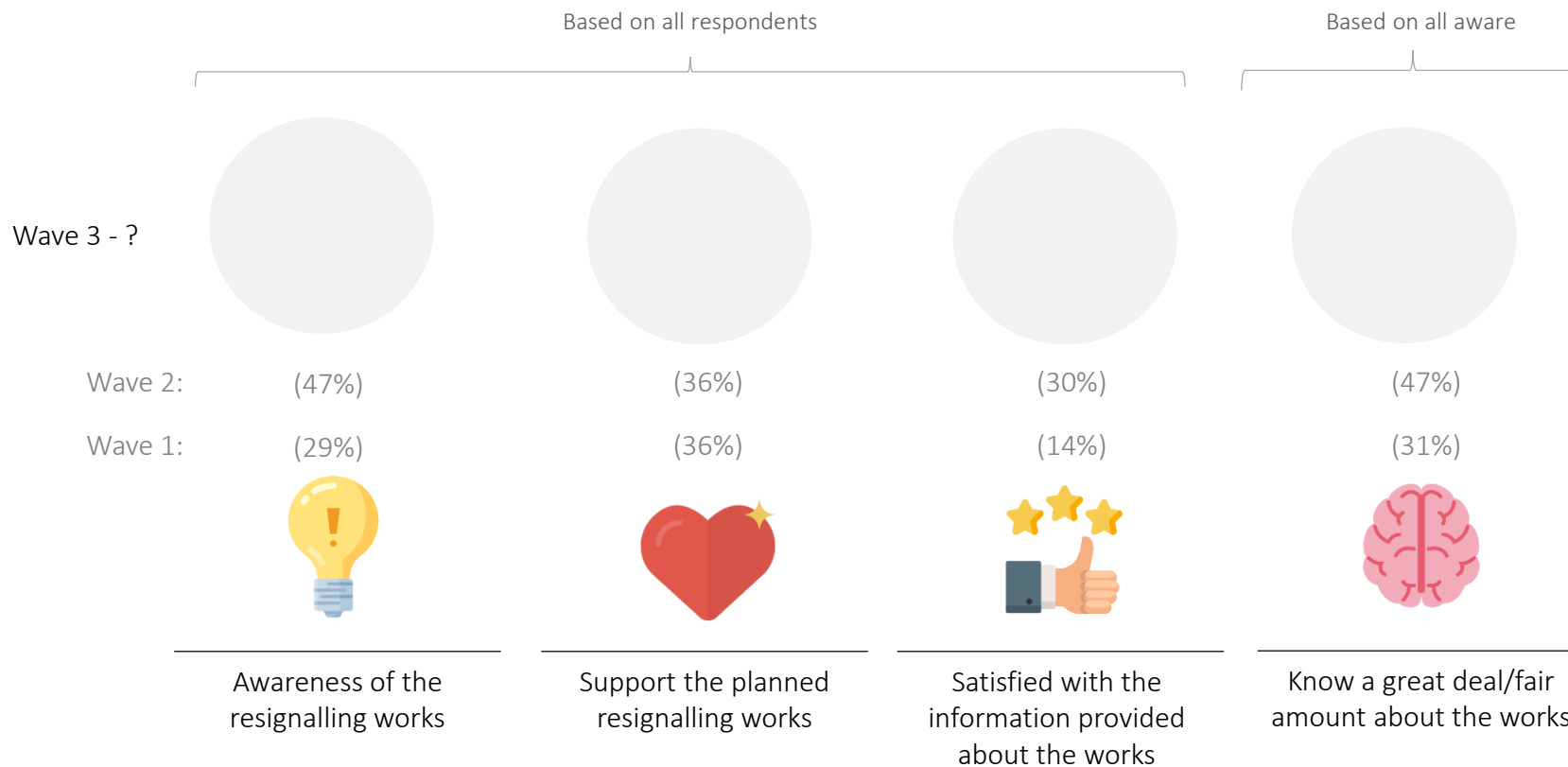
### **Support for the works has not strengthened since W1, and is lower than seen for Bath Spa and London Waterloo**

Currently just over a third support the works, with the majority indifferent, despite higher levels of awareness. There is still work to be done to clearly communicate the day-to-day benefits of the works programme (improved reliability, less waiting time), which are cutting through at a similar level to W1. This will help to justify the disruption and drive support.

## Headline results summary – W2 forecast winners



## Estimated results summary – Wave 3



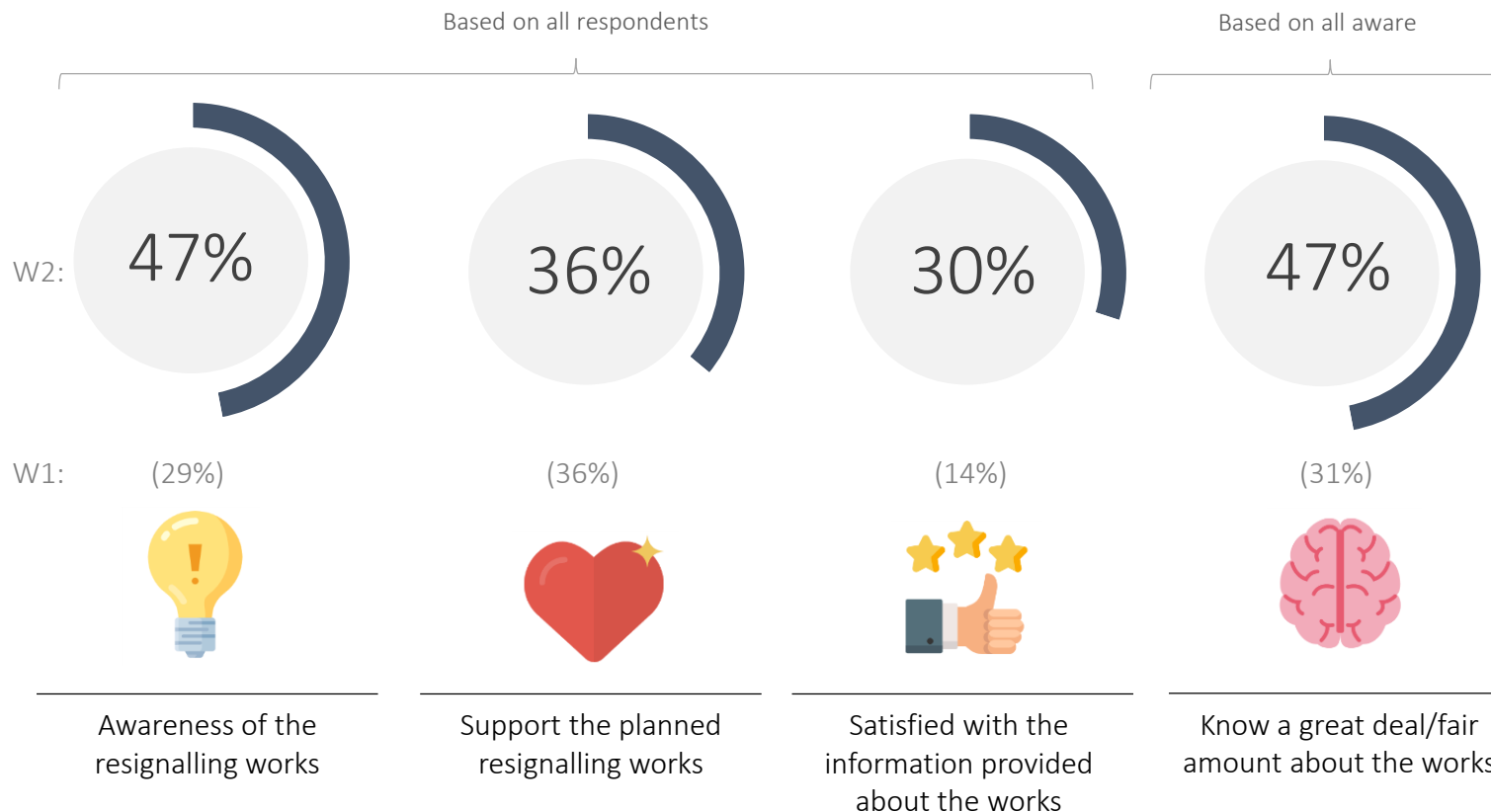
Bath Spa W3 Results (during works)



London Waterloo W3 Results (pre works)



## Headline results summary – W2



### Bath Spa Results – W1 and W2

|     |     |     |     |     |     |     |     |
|-----|-----|-----|-----|-----|-----|-----|-----|
| 42% | 67% | 46% | 54% | 19% | 35% | 34% | 49% |
|-----|-----|-----|-----|-----|-----|-----|-----|

### London Waterloo Results

|     |     |     |     |     |     |     |     |
|-----|-----|-----|-----|-----|-----|-----|-----|
| 41% | 81% | 69% | 69% | 16% | 35% | 17% | 36% |
|-----|-----|-----|-----|-----|-----|-----|-----|

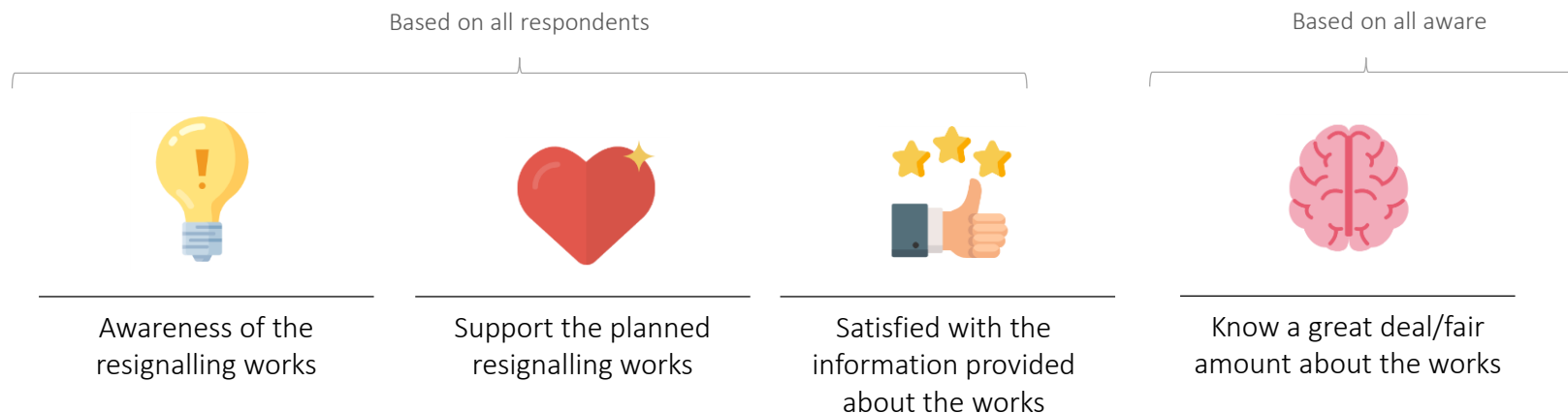
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# SECTION 7

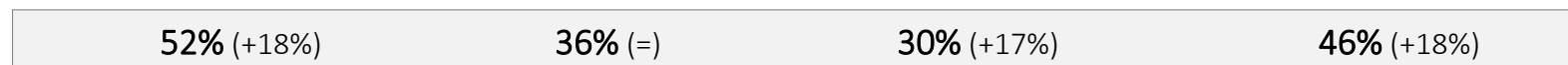
## Appendix

## Headline results by route – W2

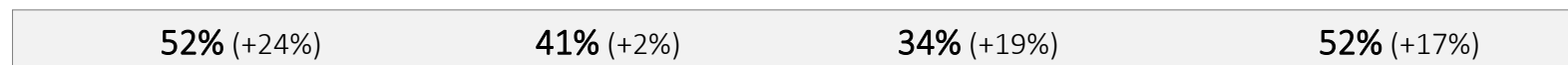
Levels of awareness are equal across the EMT mainline and local routes; however passengers of the latter claim to know more and are more satisfied with the information provided. All measures remain slightly lower for passengers of CrossCountry services



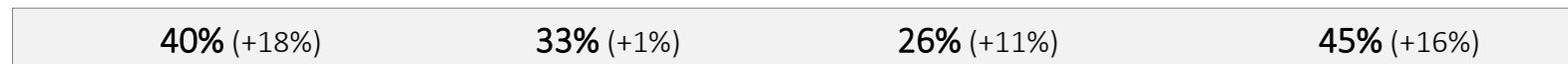
### East Midlands Trains mainline



### East Midlands Trains local routes\*



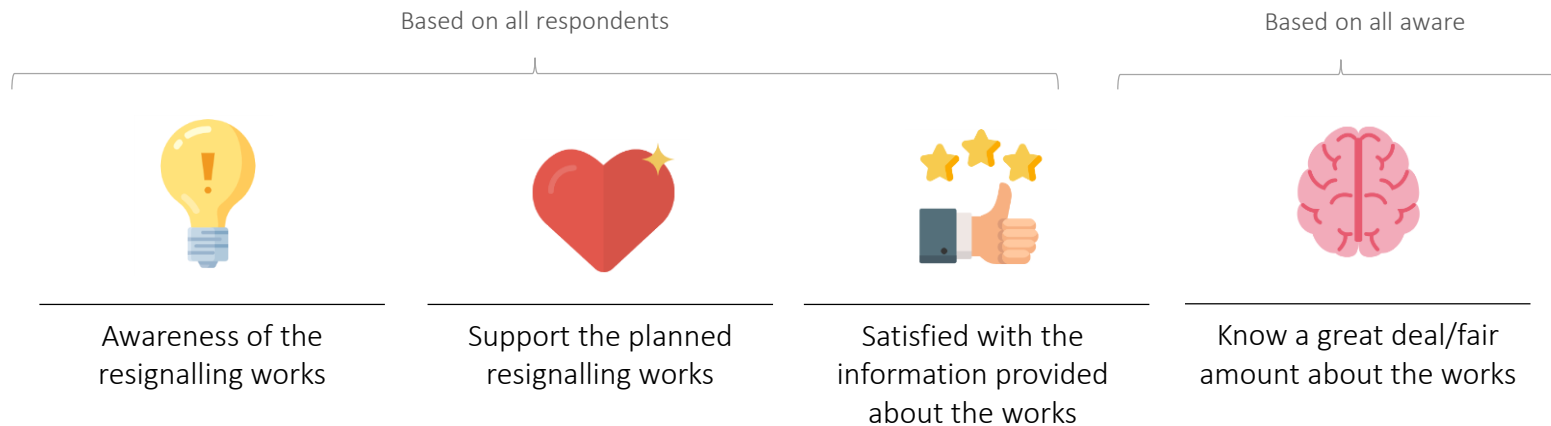
### CrossCountry routes



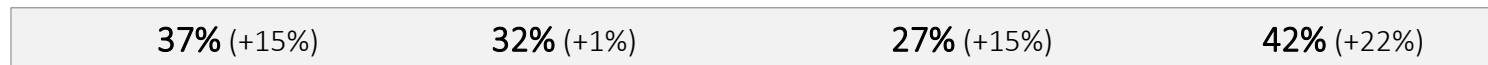


## Headline results by methodology – W2

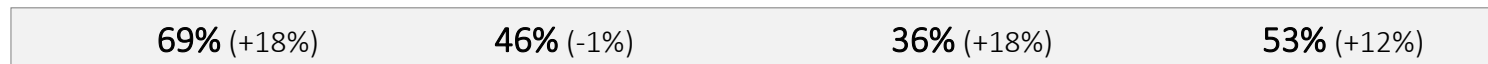
Awareness and levels of knowledge around the works remain higher for online respondents compared to those who completed a pen and paper postal return, although both have improved by the same extent in W2. Satisfaction with information provided and support for the works are also higher



F2F (Paper)

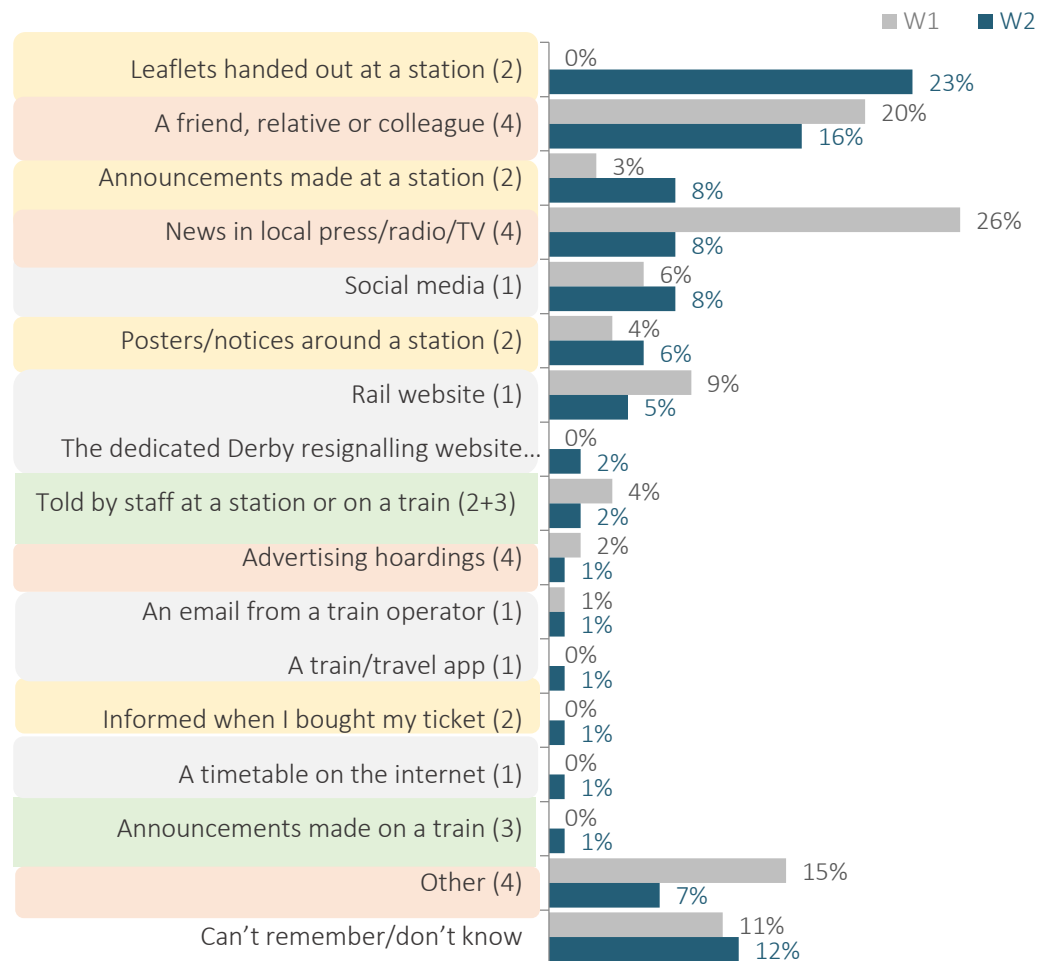


Online



## How first found out about the resigalling works

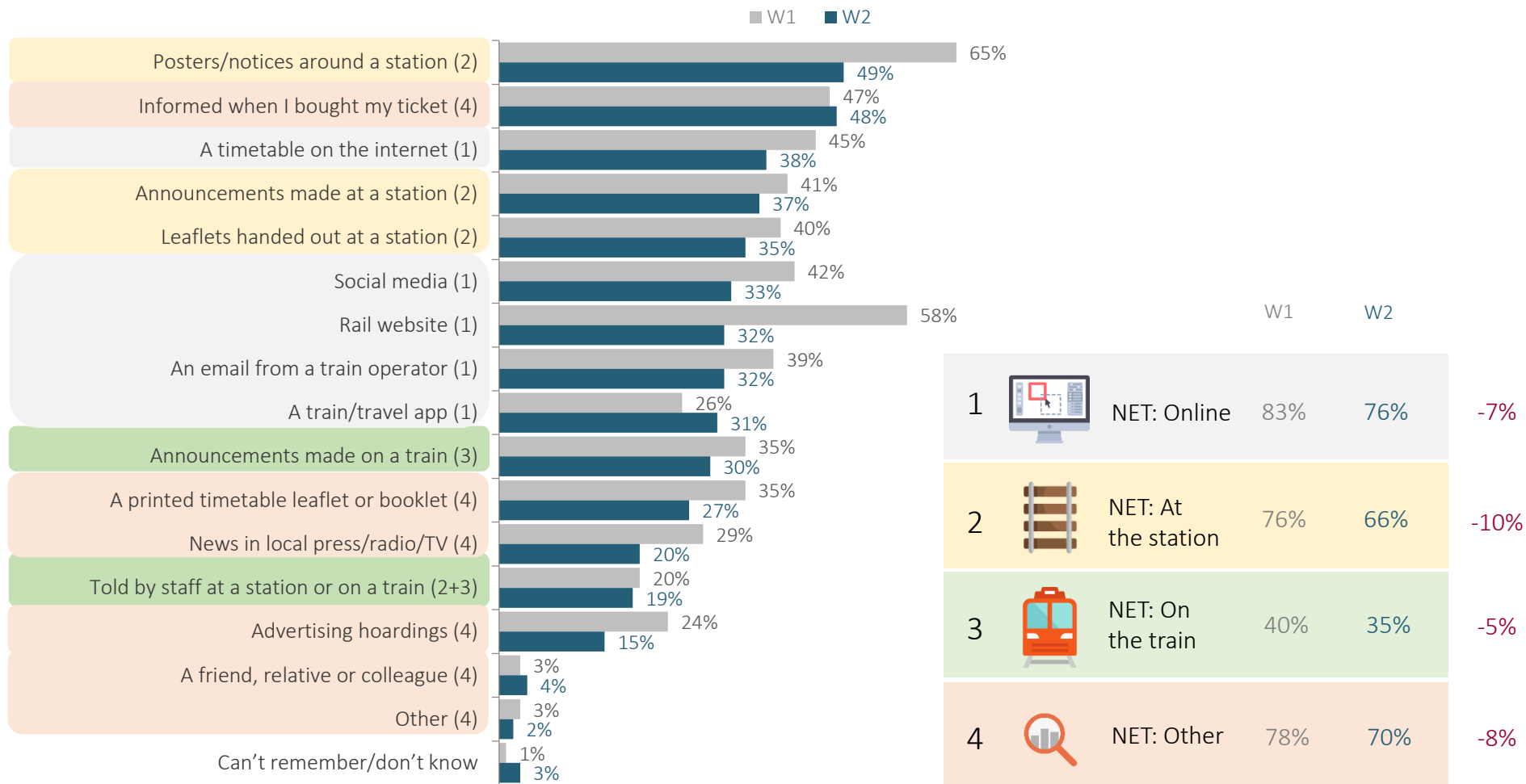
A quarter first found out about the works from leaflets handed out at a station, more so than the previous leader local press and any other channel.



|   |                     | W1  | W2  |      |
|---|---------------------|-----|-----|------|
| 1 | NET: Online         | 17% | 21% | +4%  |
| 2 | NET: At the station | 11% | 32% | +21% |
| 3 | NET: On the train   | 4%  | 3%  | -1%  |
| 4 | NET: Other          | 62% | 34% | -28% |

# Best way to be informed of future disruptions

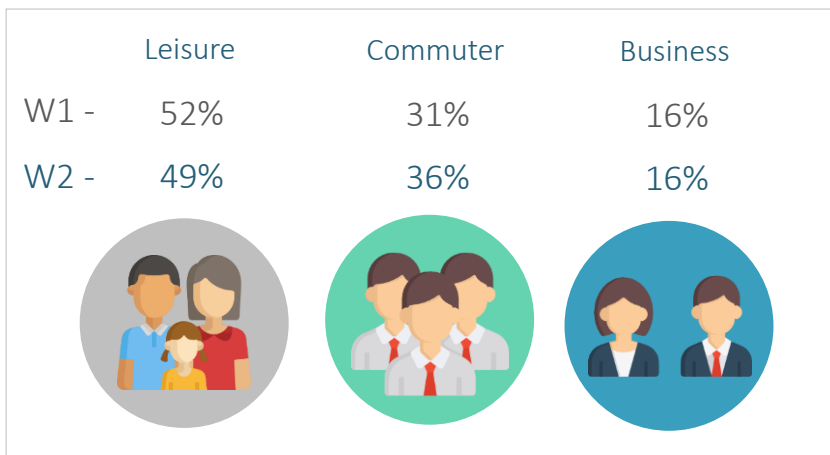
Passengers would most prefer to be informed of the works via posters/notices around a station, when they purchase their ticket and via online timetables



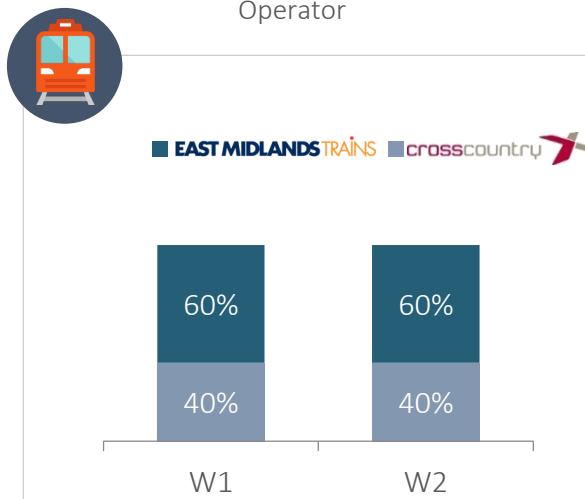
# Today's journey – profiling

The W2 sample composition relating to journey purpose and frequency of travelling on each route is in line with W1

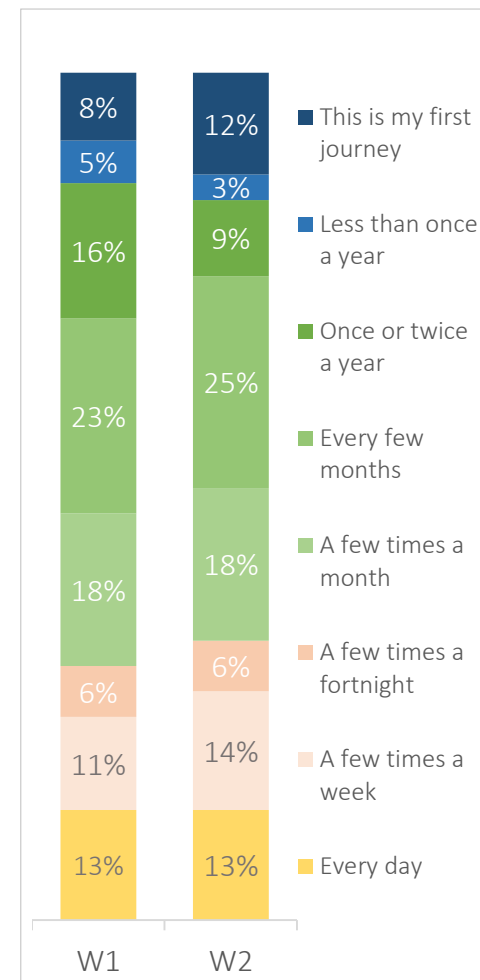
Journey purpose



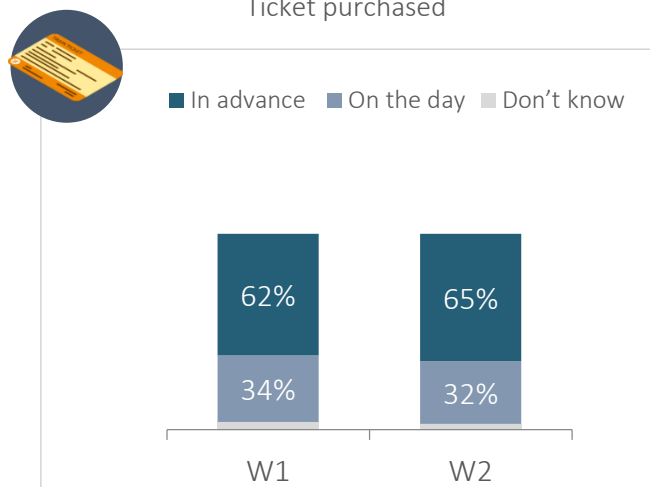
Operator



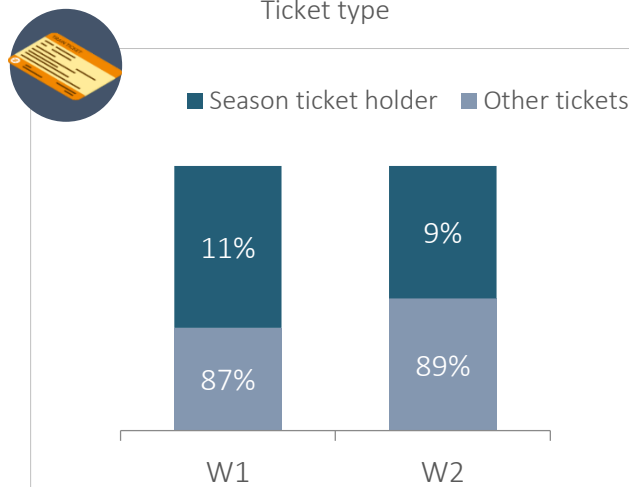
Frequency of journey



Ticket purchased



Ticket type

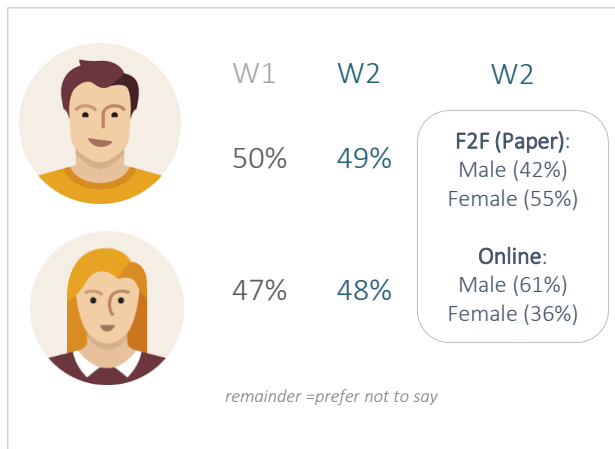


Weighting was applied to ensure that the proposition of EMT/XC passengers and F2F/Online composition are consistent for W1/W2

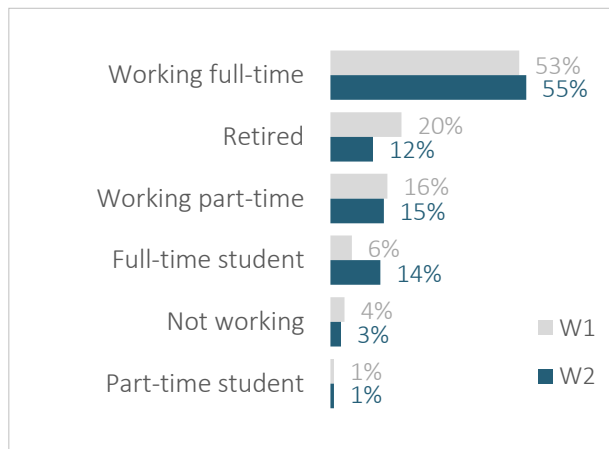
# Type of passenger

The profile of passengers in W2 is very similar to that of W1, albeit slightly younger – this is driven by a higher proportions of students

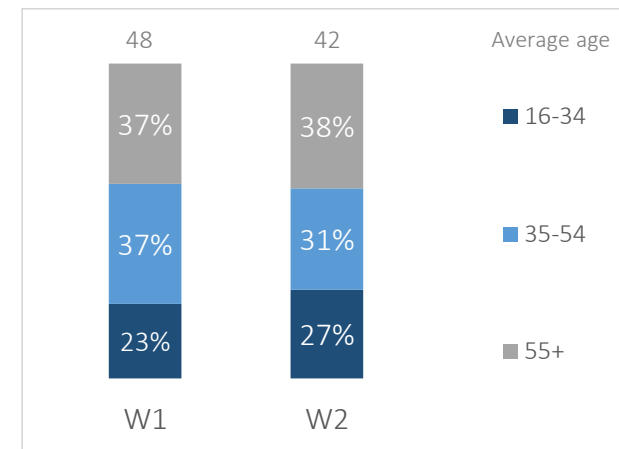
Gender



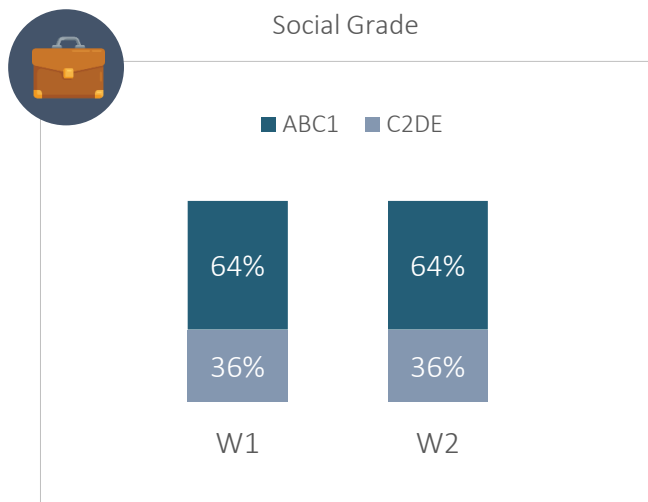
Working status



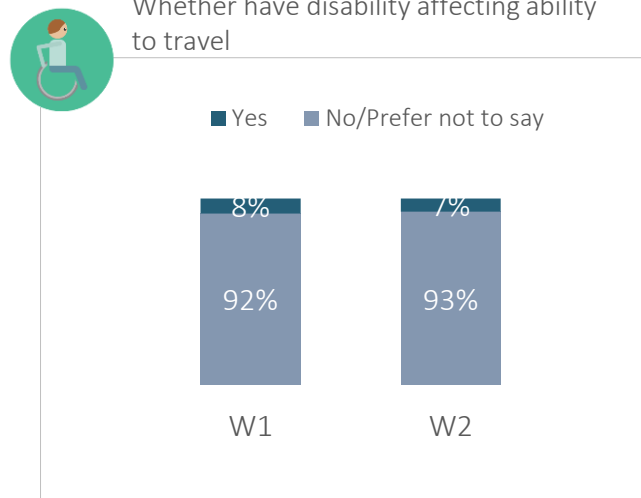
Age



Social Grade



Whether have disability affecting ability to travel



Ethnicity

