



# Planned rail engineering work

The passenger perspective  
December 2015



David Sidebottom

# Foreword

## Transport Focus

Passengers welcome investment in the rail network. Over the next few years more than £38bn is being spent on Network Rail work to upgrade lines, stations and trains, improving journeys across the country.

**P**rojects including the electrification currently underway on the Great Western main line promise improved journeys and stations as well as less crowded, more frequent trains.

However passengers will also have to endure disruption to their journeys while these much-needed, long-promised benefits are delivered. If the rail industry is to retain the confidence, trust and support of its passengers, it is vital that it takes full account of passengers' needs when planning and undertaking engineering work. This includes thinking about how it will affect different groups of passengers and ensuring that the information passengers need is available when they need it.

While there has been some progress in the way in which engineering work is planned and communicated many passengers still receive poor and unhelpful information.

Given that many passengers face several years of disruption to their journeys it is reassuring to see that Great Western Railway (GWR) is committed to understanding more about its customers' needs and is willing to respond to what passengers say they require.

We believe this new research provides valuable lessons

not only for GWR but also the rest of the rail industry. The timing, content, type and tone of information that different passengers require, as well as their perspective on the way the disruption is handled, are key factors in improving passenger satisfaction.

We thank GWR for working with Transport Focus to undertake this detailed new research into passengers' information requirements during the build up to engineering work and their actual experiences during the disruption.

We now expect the industry to listen to the very obvious but important message from passengers – “provide me with clear information about how my journey will be affected, how it will impact on me, alternative travel arrangements, and be there when I need you to support me as I complete my disrupted and potentially unfamiliar journey.” Not too much for a passenger to ask?

A handwritten signature in black ink, appearing to read 'D Sidebottom', written over a horizontal line.

David Sidebottom  
Passenger Director



Mark Hopwood

# Foreword

## Great Western Railway

**W**e have seen significant investment in the Great Western route over the past few years and there is more to come. It is exceptionally important that we are doing the right things for our customers as the investment continues. To this end we have worked closely with Transport Focus on this extended project enabling us to really get immersed in the customer experience. Using a range of methodologies has also been beneficial to unlocking and establishing the importance of different aspects of the communications leading up to major works. In undertaking this work we have been able to demonstrate to internal teams the importance of their role that previously we have only been able to do anecdotally.

We have refined our communications plan using the guiding customer principle of “What does it mean to ME and MY journey”. With the robust sample sizes we have also been able to see how a thorough understanding of the market around the affected area is essential and does have a bearing on how we need to communicate to our customers. The findings have also given us the benchmarks against which we can measure future effectiveness.

**Mark Hopwood**  
Managing Director



The Great Western Railway is benefitting from a £7.5 billion investment to modernise the route. This will include new, higher capacity, electric trains that will improve customer journeys and benefit local economies once introduced from 2017.

This will also pave the way for introduction of trains cascaded from the Thames Valley to boost capacity on Bath and Avon Valley local services.

Ahead of this Network Rail is working to electrify and adapt the Bath railway corridor to run these services. This will involve a massive and complex railway track lowering and reconfiguring scheme to the east of Bath.

From July 18 – August 31 2015 Network Rail will carry out the essential infrastructure work necessary for the electrification of the Bath railway corridor.

**BUILDING A GREATER WEST**

# Introduction

The multi-billion pound investment in electrification, signalling, track and train upgrades on the Great Western rail network is intended to provide passengers with better journey times, more seats and more reliable trains.

Inevitably the level of disruption experienced by passengers as a result of the extensive engineering work required to deliver those benefits is set to intensify over the next three years. Passengers will not only face the now-familiar weekend and bank holiday disruption, but more, longer and intrusive closures over weekdays.

Transport Focus has conducted a number of surveys into passengers' expectations and experiences of engineering works, most notably *Rail passengers' experiences and priorities during engineering works*<sup>1</sup>.



In 2010 we carried out a survey with passengers affected by the planned closure of the railway through Reading station over the Christmas and new year period<sup>2</sup>. With further closures between Reading and London planned for Easter 2015, we repeated our previous survey to establish whether the lessons learnt in 2010 had been heeded and whether the passenger experience in 2015 was any better.

Planned engineering works in the Bath Spa area in July/August 2015 gave us an opportunity for further research to ensure passengers' needs would be met. The work around Bath Spa was more disruptive than at Reading in that it covered a six-week period (including weekdays) and was not concentrated around a number of bank holidays.

With Bath Spa, we were also able to monitor and guide communications activities in the run up to the works as well as track passengers' experience of the disruption in a similar fashion to Reading.

We worked closely with First Great Western (now Great Western Railway) which funded the research programme. We started with focus groups to explore passengers' expectations and reactions to different communications materials.

In March we ran a passenger survey on both the main line towards London and regional routes through Bath Spa. This was before the communications activity started, and it gave us a benchmark measure of their awareness and expectations.

Further passenger surveys in June and July/August looked at how successful the communications activities had been in raising awareness and informing passengers about the works and alternative travel arrangements, and (in the final wave) at passengers' experience of the works (using a similar questionnaire to Reading).

This summary brings together key findings from both Bath Spa and Reading. It provides valuable learning points that can be used not only by GWR but by the rail industry as a whole.

Much more detail is to be found in the research agencies' presentations of the detailed findings for Reading<sup>3</sup> and Bath Spa<sup>4</sup>. These include details of the sample sizes (over 1000 completed interviews per wave) and questions asked.

<sup>1</sup> <http://www.transportfocus.org.uk/research/publications/rail-passengers-experiences-and-priorities-during-engineering-works>

<sup>2</sup> <http://www.transportfocus.org.uk/research/publications/reading-station-engineering-works-what-passengers-want>

<sup>3</sup> <http://www.transportfocus.org.uk/research/publications/planned-rail-engineering-work-reading>

<sup>4</sup> <http://www.transportfocus.org.uk/research/publications/planned-rail-engineering-work-bath>

# Transport Focus recommendations

While the nature and impact of the two engineering projects were very different, taken together they provide useful insight into passengers' core information needs. Fundamentally passengers told us that they need to know *'what it means for my journey'*.

This does not mean that there can be a blueprint for every planned disruption. Far from it, it indicates the need for a flexible approach to communications planning in the build up to planned disruption.

The fact that every project and the associated disruption is different means that the onus is on train companies and Network Rail planners to know what their passengers want and understand how a specific project will affect different passenger types.

The results of that assessment should then allow them to tailor communications to give the right level of detailed information when passengers want it, using the most effective communications channel.

## **1 Consider how the various elements of the engineering work are likely to affect individual passengers' journeys: who does it affect and how?**

- Weekends and Bank Holiday works will mostly affect leisure passengers with smaller proportions of commuters, for example people in the service and retail industries.
- Weekday/longer duration works will affect a much greater proportion of commuters and business travellers. Leisure passengers will also be affected, and the time of year (for example summer, or school holidays) will also alter the passenger balance.
- The scale of the engineering work will obviously determine the impact on passengers – a six-week period of disruption is naturally more intrusive than an Easter closure when the railway is likely to be quieter. However, it is important to remember that the impact on the individual could still be considerable.
- The extent to which the impact of work can be reduced is also key. For example if passengers can be kept on trains they feel less inconvenienced than if rail replacement services (RRS) are involved.
- Passengers may face the prospect of unfamiliar journeys, involving RRS, different stations, or the use of local scheduled services, so they need plenty of advance warning and reassurance as well as support on the ground. Those with accessibility issues will require specific consideration.

## **2 Build this insight into your planning approach so that you are able to deliver a tailored information campaign: tell passengers what they want to know about their journey, when they need to know it**

- Passenger information requirements need to be factored into the project planning process at an early stage, particularly in terms of train timetable planning, so that information can be communicated.

## **3 Tailor your message**

- Focus messaging on passengers' hierarchy of information need. For example, commuters want early information with details of impact and alternative arrangements; leisure passengers' requirements tend to be less urgent but they also need information to enable them to plan.
- While the benefits of engineering work can be of interest to passengers, they place greater priority on having information that alerts them to the forthcoming work, flags the impact on their journey and tells them about alternative travel arrangements.
- The complexity of some projects means a highly-focused and multi-layered communications approach is needed. For example those in different parts of the network or on the fringes (but nevertheless affected) will require specific information.
- However, keep the messages simple. For example, alternative travel arrangements need to be set out in a very clear and simple way with full details of how much longer journeys will be.
- Where information is not yet available, there should still be clear signposting on when and where passengers will be able to access more detailed information. Passengers should be reassured about the relaxation of ticket restrictions early on in the build-up.
- Tone is also an important aspect of any information campaign. Passengers want to be treated with respect as intelligent beings and want the rail industry to show empathy towards their situation. Failing to acknowledge the disruption work will cause to passengers' lives will alienate.

Figure 1

Passengers' hierarchy of information needs for planned engineering works



**4 Timing of information: every project is different so be prepared to be flexible**

- Passengers need to be able to make informed choices about their travel plans. Information about alternative arrangements, length of disruption and increased journey time should be available when bookings are being made.
- Some, like commuters may need early notice to enable them to plan. For example a change to tightly-managed timings may mean alterations to childcare arrangements, require earlier connecting travel, or be instrumental in selecting holiday dates.
- Leisure and business passengers' needs tend not to be as urgent, though some may be making decisions much more in advance. For example, some passengers may make plans for Christmas early on to benefit from cheaper fares.

- As such it is imperative that the train plan adheres to the T-12<sup>5</sup> obligation so that information can be provided to passengers when they need it – not when the industry feels they can or should have it.
- Passengers also tell us that there are instances, particularly when disruption is likely to be especially intrusive, where indicative train service information is required much earlier than three months before the disruption.

**5 Use full range of information channels to reach different types of passengers**

- Good access to information should help build confidence and trust in the rail industry's ability to deliver engineering work.
- Preferred channels can vary according to passenger type so this needs to be built into communications plans.

<sup>5</sup> ORR glossary (<http://orr.gov.uk/glossary>): T-12 - The ability of passengers to obtain travel information, make reservations and book tickets in advance is affected by changes to the timetable caused by Network Rail taking possession of lines in order to maintain, renew and enhance the network. Under Condition 2 of its network licence, Network Rail is required to ensure that accurate timetable information is available to train operators at least twelve weeks in advance.



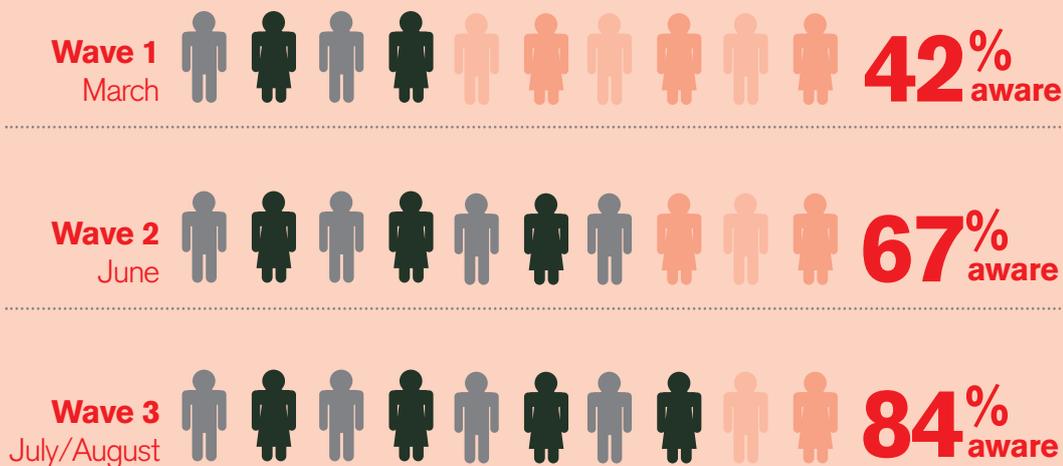
# Summary of the research

## Building awareness of the works

The research in Bath Spa allowed us to monitor the effect of communications activity over time. In our benchmark wave, before any timetable details were published, two out of five passengers were already aware of the work planned for the summer.

Figure 2

### Growth in awareness over time Bath Spa (all passengers)



With communications activity ramping up, awareness had risen to two thirds in June ahead of the works. To improve this still further the communications programme was fine-tuned and as a result more than four out of five passengers travelling during the works were aware of the work before embarking on their journey.

Because the Bath Spa works took place during the working week, reaching regular travellers was critical. Successful tactics included letters to season-ticket holders and posters at stations. In the end there was an awareness level of 97 per cent among commuters in the area. The higher proportion of commuters impacted by the weekday work at Bath Spa probably explains why overall awareness at 84 per cent is better than was achieved in Reading over the Easter holiday period, 75 per cent.

It is also worth noting that while awareness among passengers using the main line from Bath Spa towards London was 80 per cent, it was 92 per cent among passengers on regional routes into Bath Spa who had to use a replacement bus (Rail Replacement Service). Perhaps the greater impact of bus replacement on their routines meant they were more likely to engage with communications activity and contributed to the campaign working better for these passengers.

### Information channels

Both Bath Spa and Reading show the importance and value of providing information at stations. Across all three waves of research in Bath Spa, 'station information' such as posters, information screens, announcements and information from staff, was the most likely way for passengers to find out about the works.

The value of digital channels (websites, emails, and apps) increases as the works approach – roughly twice as many passengers got their information digitally during Wave 3 than in earlier waves. Most of the digital sources are websites like National Rail Enquiries or train companies' journey planners; very few passengers said they had been made aware via social media.

Perhaps not surprisingly, the train operator's own website did particularly well at informing passengers but less so third-party ticket resellers (such as Trainline). These days many passengers turn to the web as their first step for information and initially they experienced difficulties in finding information about the Bath Spa works – in part because the works at Reading over Easter were being given prominence.

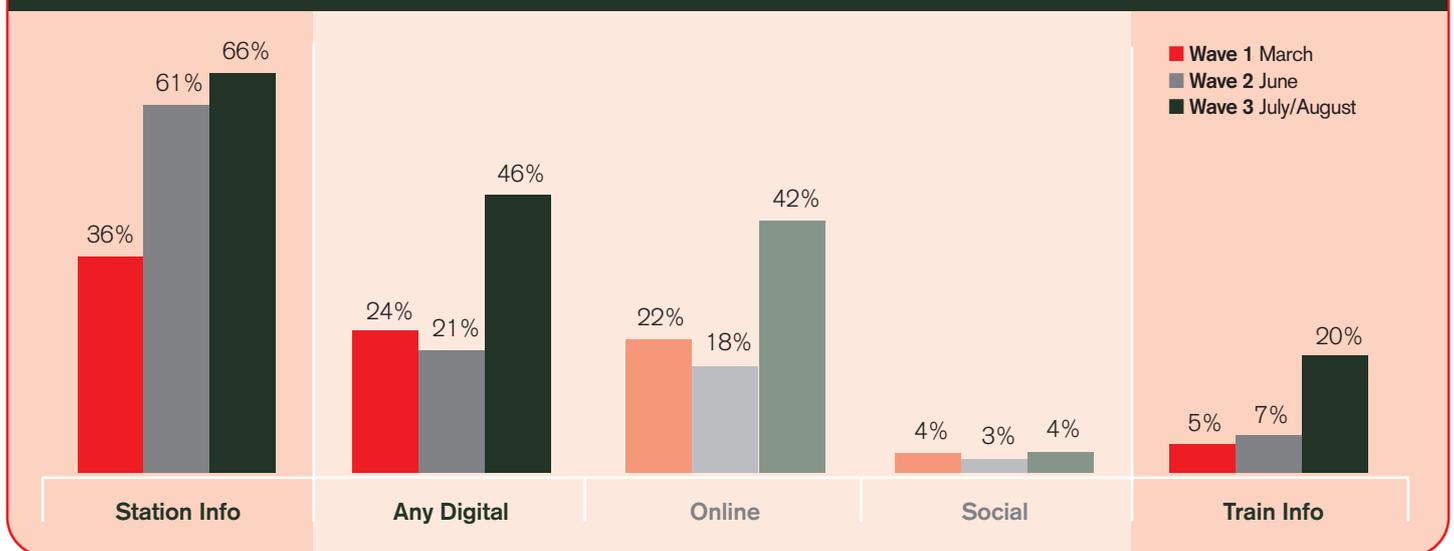
The value of on-train announcements or information from train staff must not be overlooked, both in the run up to the works but particularly during them. One in five travellers at the time of the works got information from on-train staff or announcements. While not specifically recorded in the research, we note that the train operator made good use of window stickers, seat-back labels and the like to alert passengers to the work.

Although not included in the chart below, it is worth noting that more than a quarter of Bath Spa passengers heard about the works by word of mouth. This had been particularly important in terms of building initial awareness before any substantial communications activity, although as we shall see later, satisfaction with information provision was lowest at this time.

While the Reading research did not look at the evolution of awareness over time, the sources mentioned by travellers during the works align with those recorded in Bath Spa.

**Figure 3**

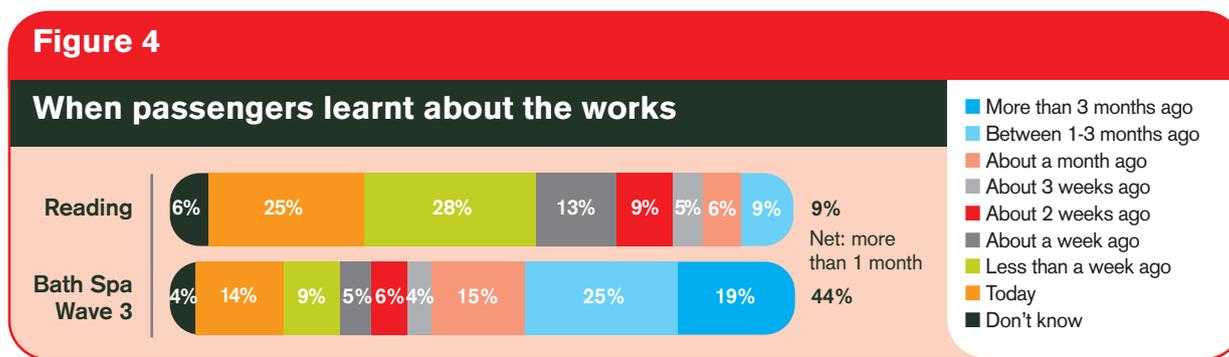
#### How passengers learnt about the planned works Bath Spa



## Timing of information

The figure below illustrates a key difference between the Bath Spa and Reading works, their timing (holiday weekend or weekday) and the associated communications activities.

Two thirds of Reading passengers heard about the works in the week before travelling; in Bath Spa this proportion was just a quarter. In Reading, less than one in ten claimed to have known about the works for more than a month; in Bath Spa, a fifth reckoned to have been aware for more than three months.



A key point here is the different passenger types impacted at each location. The weekday works in Bath Spa impacted many commuters whereas Reading primarily affected leisure travellers. Commuters in Bath Spa were aware of the works much earlier than other passengers – 71 per cent at least one month in advance against 32 per cent of leisure travellers.

However one in five Bath Spa passengers, and one third of commuters, would have liked to have information available more than three months in advance of the works.

One key issue was the availability of detailed timetable information. Passengers, in particular commuters impacted by the weekday works, were already asking for this in the benchmark wave in March before any significant communications activity had taken place and many were still missing this in June. Difficulties in finalising the train plan for the period of the works meant that this information was not being made available to passengers although this was the very information they most wanted.

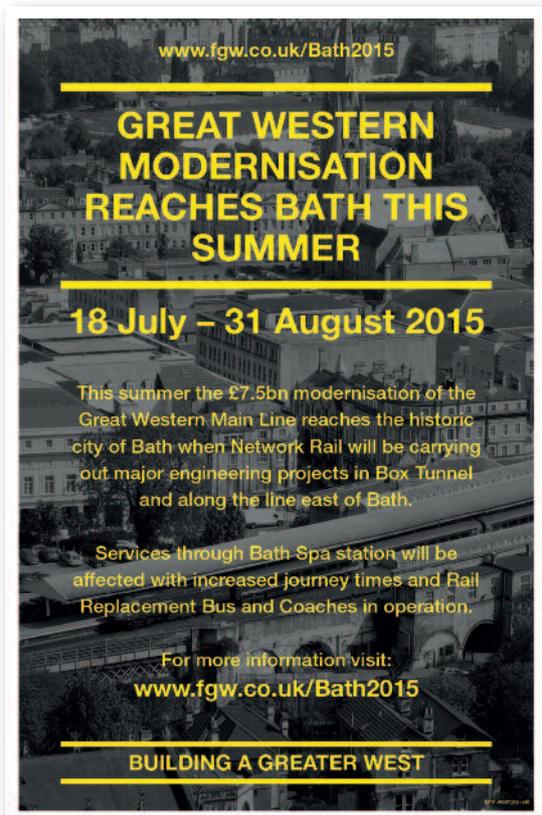
It is crucial that the railway at least meets its self-imposed three-month advance notice deadline for timetable information. Beyond this there is a good case to say that, where commuters are impacted and may wish to arrange season ticket purchase and annual holidays around planned works, then six months would be a good target. New consumer legislation will in any event require train operators to notify season ticket holders of any known work at the time they buy or renew their ticket.



## Satisfaction with information provision

While ultimately three out of five passengers travelling during the Bath Spa works were satisfied with the information they had been given, this was not the case in the run up to the works and was a cause of some concern to those involved.

Passengers we spoke to in the focus groups in Bath Spa



showed a 'hierarchy of needs' (see Figure 1). They prefer to hear first about the fact that work is planned, then the effect on their journeys and how this might be mitigated. It is only then that they want the rationale for and benefits of the works.

In line with this, the passengers we subsequently surveyed on trains in the area wanted more detailed information on the impact for them. They wanted to know what their travel options would be and particularly, as noted earlier, the timetable for re-timed trains and replacement buses.

We noted particular concerns about replacement buses in terms of knowing their routes and where they would stop – both in terms of the locality but also the actual pick up/drop off points.

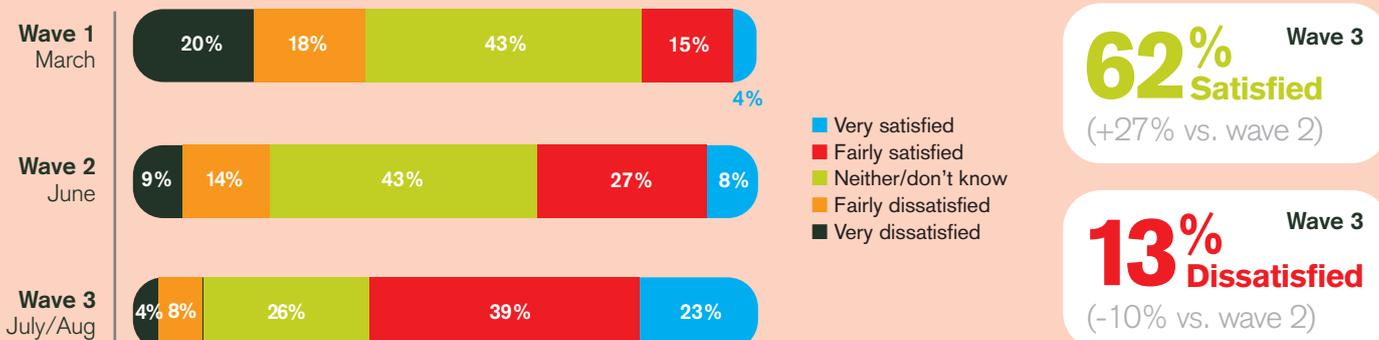
Passengers also told us that, while it is good to know why works are being undertaken and what the ultimate benefit will be, this is not their primary requirement. Many were critical of the tone of several leaflets and posters for 'selling' the vision of travel improvements after the works and neglecting the disruption that would result during the works. They highlighted a lack of empathy towards passengers' situation.

In Reading satisfaction with information was 57 per cent. Communications activities around the works in the Thames Valley at Easter were more effective for passengers at Reading itself than at Hayes & Harlington. We suspect that passengers at Reading have become accustomed to altered rail services and replacement buses as the programme of work has been ongoing for several years, whereas the Crossrail work at Hayes was something new and passengers had no previous experience of such disruption.

It will be interesting to see whether passengers who have now experienced disruption caused by improvement works are more accepting of future works in the area.

Figure 5

### Satisfaction with information provision Bath Spa



## Journey satisfaction

Unsurprisingly, journey satisfaction during the works around Bath Spa was lower than it had been during the earlier waves. Nevertheless, two thirds of passengers remained very or fairly satisfied with their journeys – down just 14 percentage points from Wave 2.

Journey satisfaction was highest for leisure travellers (74 per cent) and lowest for commuters (61 per cent) as is the case in our National Rail Passenger Survey.

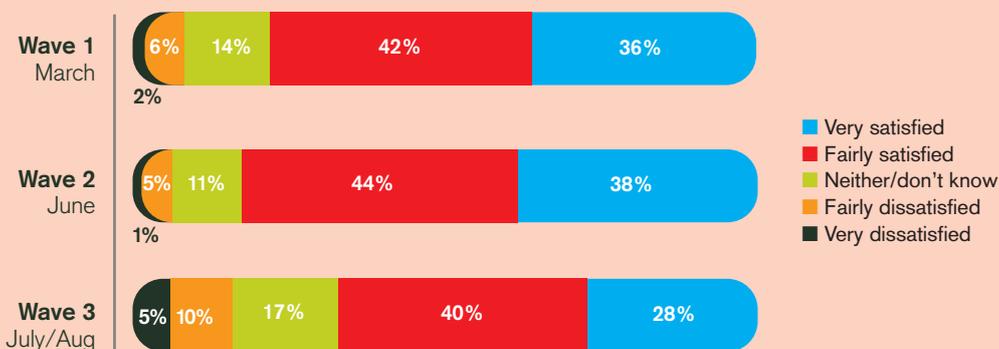
Passengers on main line services to London recorded 67 per cent satisfaction. This compares well with our standard National Rail Passenger Survey (NRPS) score for the route when free of works; in Spring 2014 it was 80 per cent.

On regional services, 69 per cent were satisfied during the works compared to 73 per cent in the spring. We know that passengers prefer to stay on a train than use a replacement bus and passengers on regional services who were still able to travel by train were more satisfied (74 per cent) than those who had to take a bus (62 per cent).



Figure 6

### Journey satisfaction Bath Spa



**68%** Satisfied  
Wave 3  
(-14% vs. wave 2)

**15%** Dissatisfied  
Wave 3  
(+9% vs. wave 2)

## Satisfaction with disruption handling

We have seen how, by the time of the Bath Spa works, passengers were generally well informed about the impact to them. This may have contributed to their high level of satisfaction with how the train company handled the disruption – 45 per cent were fairly satisfied and 29 per cent very satisfied. The overall satisfaction level of 74 per cent compares with 69 per cent for Reading at Easter.

In Bath Spa, leisure passengers were the most satisfied (82 per cent) and commuters the least (67 per cent).

Notably, regional passengers on a replacement bus were significantly more satisfied (81 per cent) than those still able to take a train (73 per cent) or using the main line (72 per cent). It seems that while passengers dislike the prospect of replacement buses and give lower journey satisfaction ratings when using a replacement bus, their actual experience once on board a bus is fairly positive (other than in terms of help with luggage).

In Bath Spa, we also took the opportunity to track passengers' level of trust in First Great Western (as it then was). Passengers' level of trust stayed constant across the three waves of the research and seems not to have been impacted by the disruption.

Figure 7

### Satisfaction with disruption handling

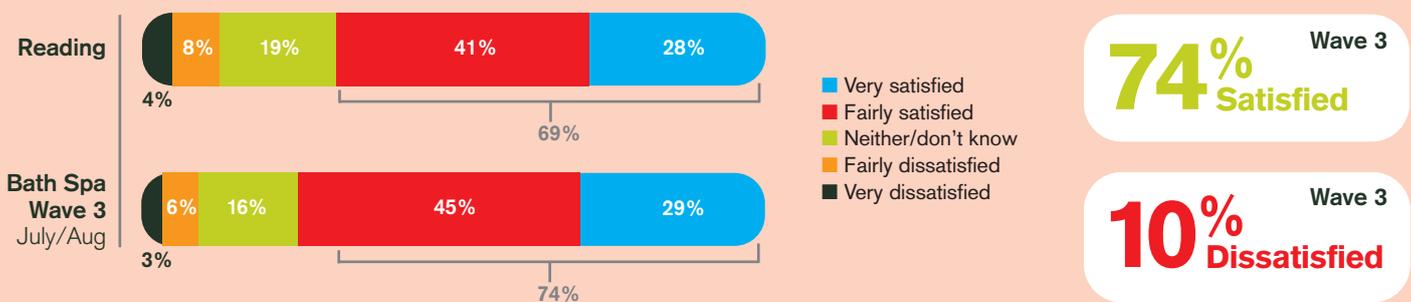
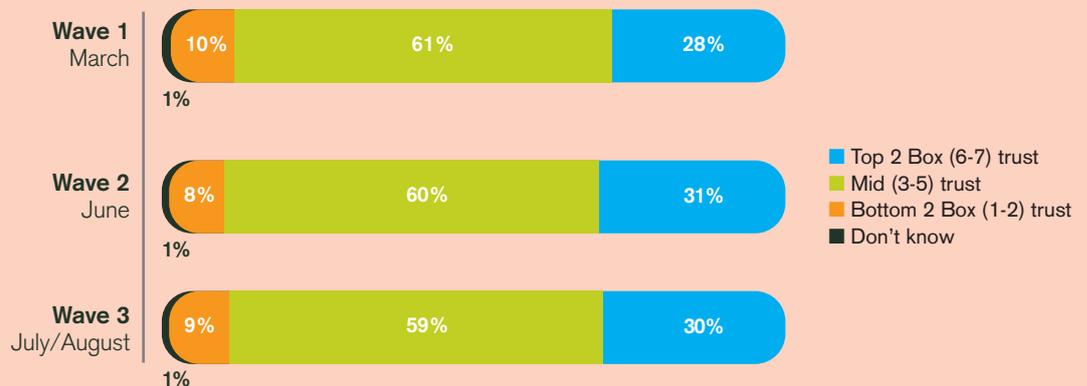


Figure 8

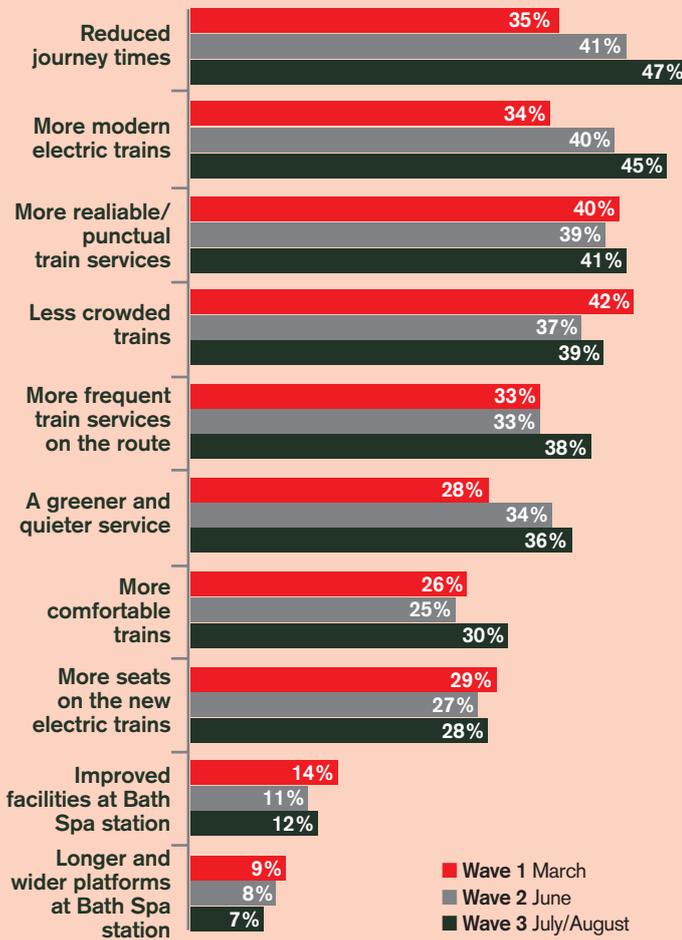
### Passenger trust Bath Spa

**Q:** First Great Western operates the majority of services on the route you travelled today. All things considered and on balance, how much do you trust First Great Western where:  
1 = do not trust at all and  
7 = trust a great deal?



**Figure 9**

**Perceived benefits of the works Bath Spa**



**Perceived benefits of the Bath Spa works**

When asked about the benefits to them of the works, passengers in Bath Spa generally reply those listed in the various communications activities such as new, electric trains with less crowding and a quicker, more frequent and more reliable service.

While these benefits apply to the main line, the new electric trains will not be seen on the regional services. Managing expectations during and after the transition is an important area to bear in mind.

**Support for the Bath Spa works**

Even before the majority of communications activities had started, just under half of passengers surveyed at Bath Spa supported the works. This grew steadily throughout the period; during the works one quarter of passengers strongly supported them and a further third tended to support them.

Opposition was low (5 per cent) and tended to relate to the disruption to be endured in the meantime or to general scepticism about the railway and its ability to deliver the promised benefits.

**Figure 10**

**Support for the works Bath Spa**

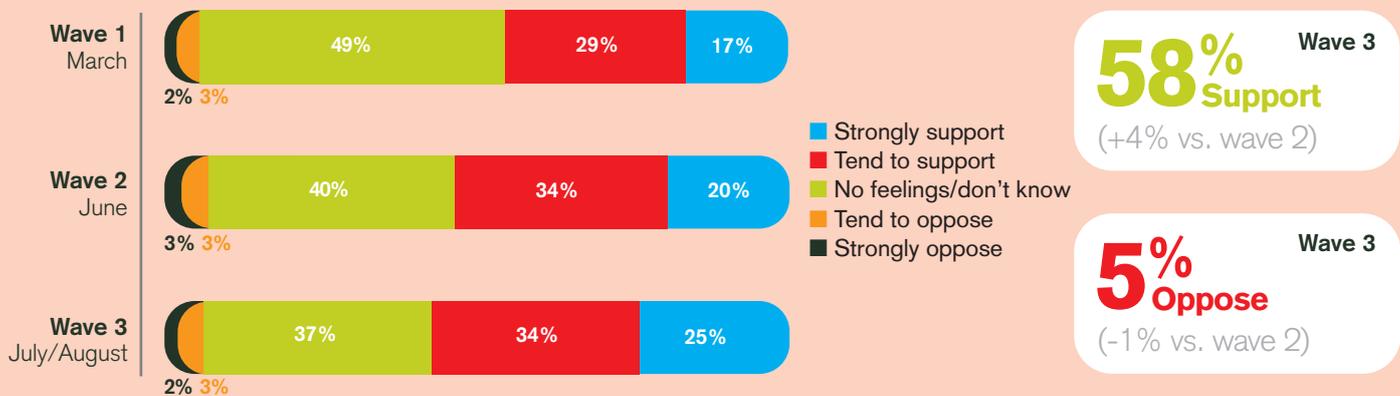
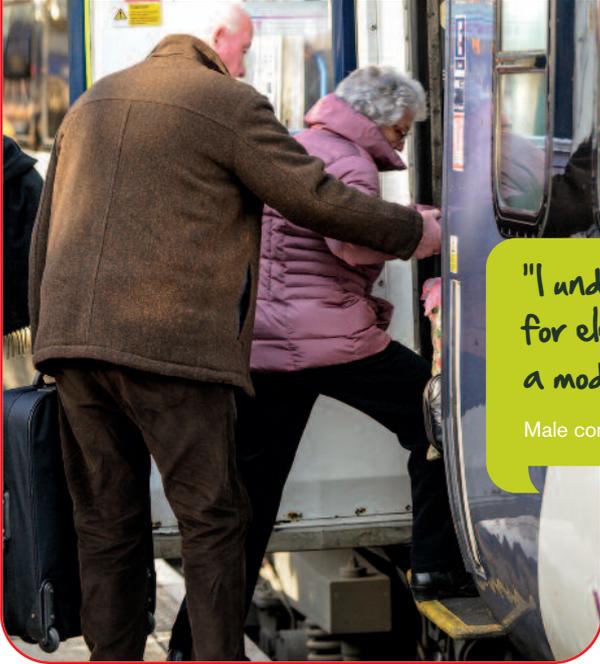


Figure 11

Reasons for support/opposition



"I think the modernisation is very important."

Male commuter

58% Support

"Short term inconvenience for hopefully a long term gain. Better trains/modern infrastructure etc."

Male commuter

"I understand the need for electrification and for a modern service."

Male commuter

"It will be good to have a modernised, more fuel efficient and reliable service. It's a pity Brunel didn't plan for electrification when they built the tunnel."

Female commuter

"I do not support it because for a whole month my journey to work is over doubled its time which therefore makes my day even longer."

Female commuter

5% Oppose

"I don't believe that the amount of disruption will be commensurate with the benefit of electrification."

Female commuter

"Work done not likely to benefit me on local branch line as I rarely use the HST services."

Female commuter

"The case for electrification is unclear."

Male commuter

## Learning from experience

We have seen how First Great Western was able to react to the findings from Waves 1 and 2 prior to the Bath Spa works, to fine tune its plans and to try to improve the passenger experience.

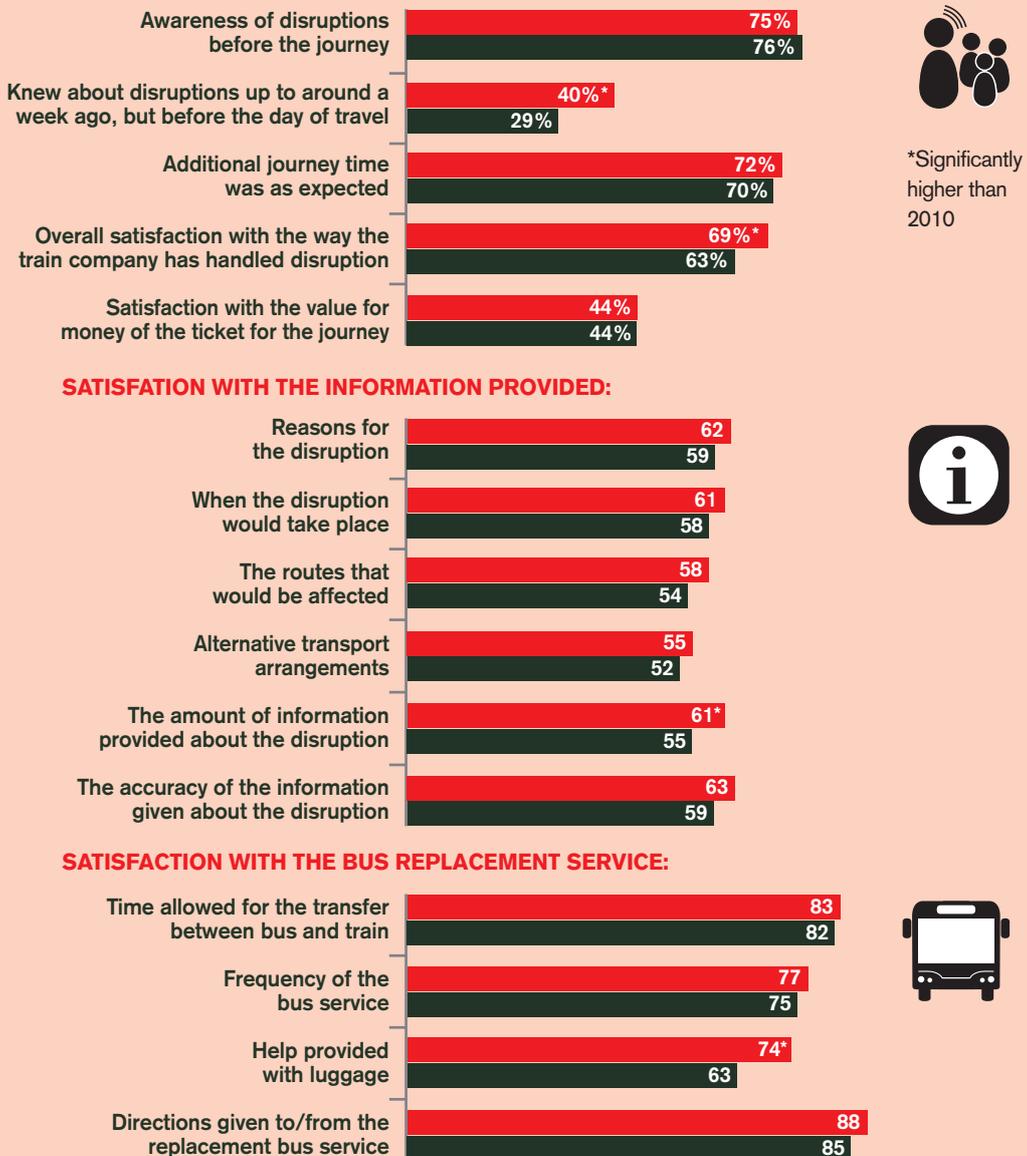
FGW also used the findings of our initial qualitative (focus group) research to develop its communications materials. Having seen the value of getting the passenger perspective, the company asked Transport Focus to take refined materials back to the

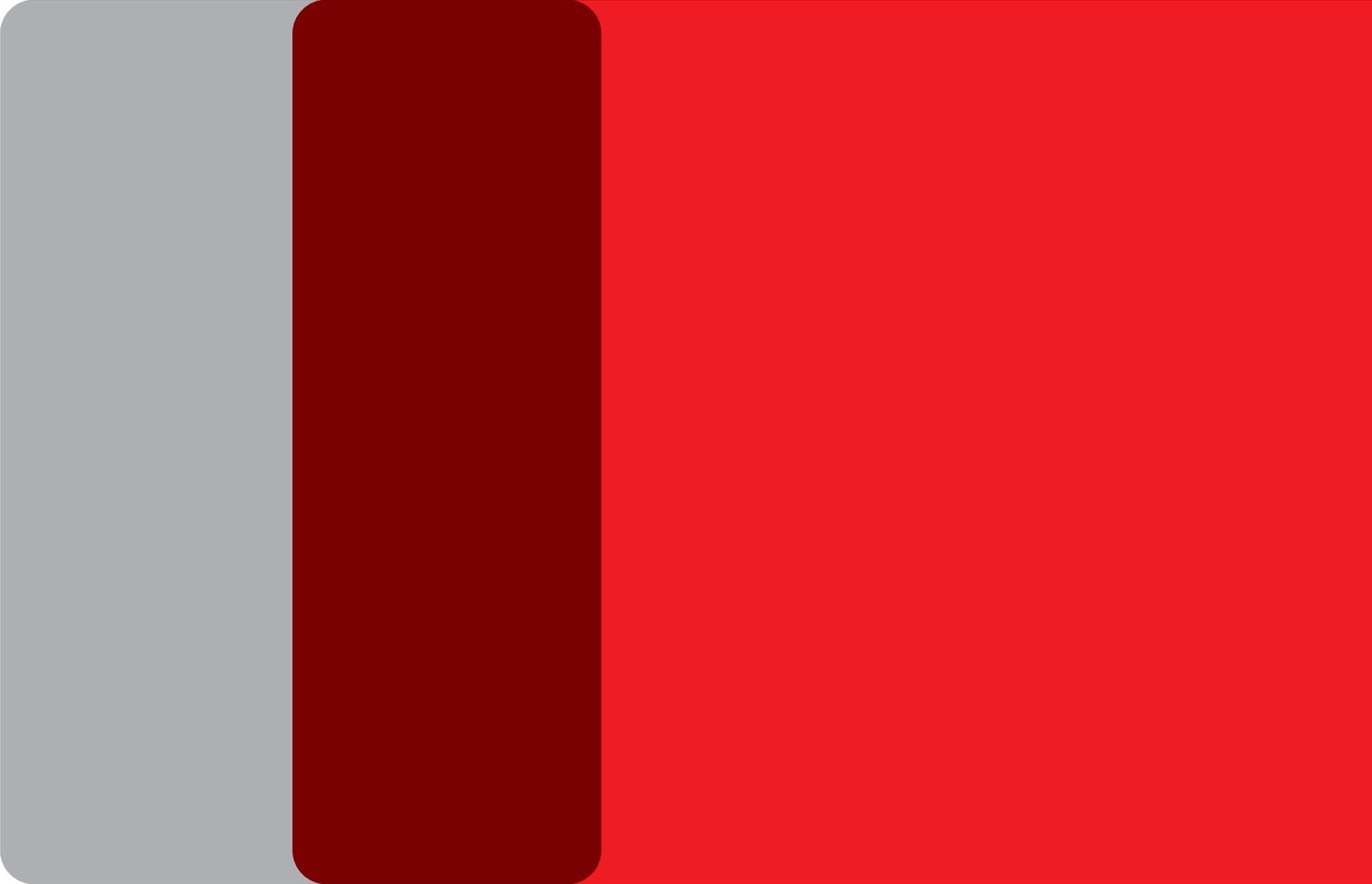
same passengers for a final check.

For Reading, although we ran just a single wave of research we used a similar questionnaire at Easter 2015 to the one used at Christmas/New Year 2010. We can therefore compare and contrast passengers' experiences during the two periods of disruption and see whether lessons from the earlier works had been learnt and acted upon. Reassuringly, most measures show an improvement and demonstrate the value of research like this as a benchmark for measuring performance effectiveness.

**Figure 12**

### Passengers' experience of disruption Reading





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