

TRANSPORT FOCUS & NETWORK RAIL

Bristol East Junction Works

WAVE 3

July 2021

.YONDER

transportfocus 

Project background and methodology

Background

Network Rail (NR) will be replacing the tracks and signalling outside Bristol Temple Meads station at Bristol East Junction over the summer (10 July until 3 September). Inside the station, work is under way, including the restoration of the station's roof.

Past studies have shown that passengers want accurate, honest information about delays and disruption.

Transport Focus has partnered with *Network Rail* to monitor passengers' awareness of the works and associated travel disruption and their expectations in terms of communications.

Methodology

This report presents the results of **Wave 3** of three waves of quantitative research.

This wave monitors changes in awareness and understanding following an increase in comms activity.

- **Data collection:** 15-minute online survey
- **Sample:** Yonder's online panel + boost through CrossCountry, Network Rail and Great Western Railway social media.
- **Screening criteria:** Travelled via Bristol East Junction recently, or would have done were it not for the pandemic AND who are likely to travel via Bristol East Junction in the next 6 months
- **Sample sizes (Wave 1/Wave 2/Wave 3):**
 - Main panel: 407/406/420
 - CrossCountry Twitter and Facebook boost: 31/14/7
 - Network Rail Twitter boost: 23/10/5
 - Great Western Railway social media: -/35/-
- **Fieldwork dates (Wave 1/Wave 2/Wave 3):**
 - Panel: 16 - 24 Mar/19 - 26 Apr/17 - 23 Jun 2021
 - Social Media channels: 24 - 29 Mar/19 - 30 Apr/17 - 28 Jun 2021

Thank you for your patience throughout our work.
Please bear with us and remember to check before you travel.

Get the latest travel updates:
nationalrail.co.uk or GWR.com/Bristol

For more information visit
networkrail.co.uk/bristolrailregen
or call our 24 hour helpline:
03457 11 41 41

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Excuse our appearance while we transform Bristol Temple Meads.

We're restoring our roof, rewiring the station and laying new tracks, to make Bristol Temple Meads even better than ever.

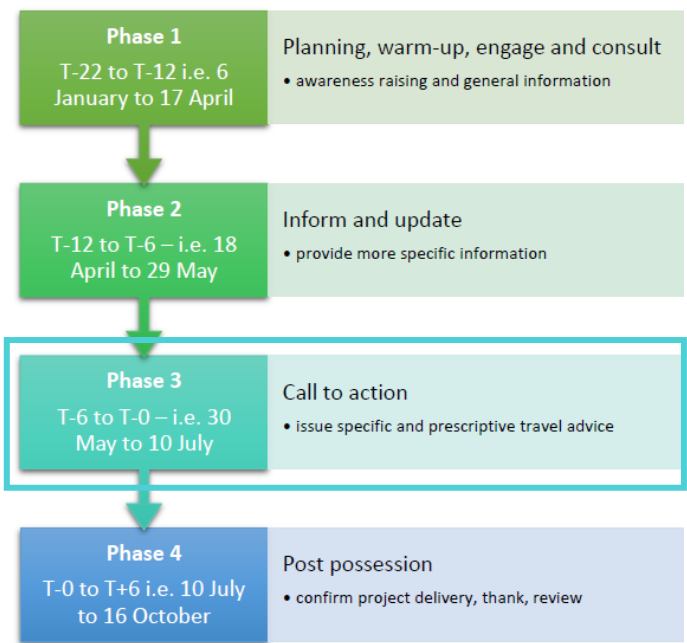
Logos: Network Rail, CrossCountry, Great Western Railway, South Western Railway, West of England

What has happened since Wave 2?

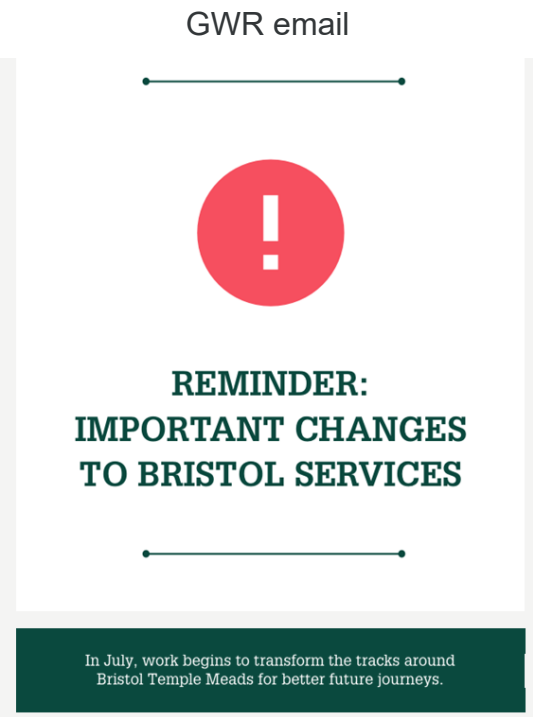
Wave 2 (19-26 April) to Wave 3 (17-28 June)

During Wave 3 fieldwork, communications were a few weeks into phase three of a four-phase approach. A number of communications were circulating during this time.

Four-phase communications approach



Communications examples



Notes on benchmark comparisons from other studies

Within the report, we have made comparisons to six previous research projects Transport Focus has undertaken to understand the impact of engineering works – Bath Spa in 2015, London Waterloo in 2016-17, Derby in 2018, Brighton Main Line in 2018 and King's Cross in 2019 and West Coast Main Line in 2021. While these provide a useful benchmark by which to analyse the results for the Bristol East works, it is worth noting that there are a number of differences across each project, including:

- 1) **Passenger type composition** – London Waterloo and Brighton Main Line have a higher proportion of commuters within the sample, reflective of the type of passengers using the affected services
- 2) **Face to face (F2F) vs. online composition** – while the WCML and Bristol studies have used only online interviewing, composition of F2F versus online interviews will not be entirely consistent across each project. Composition of F2F vs online composition for previous studies depended 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:

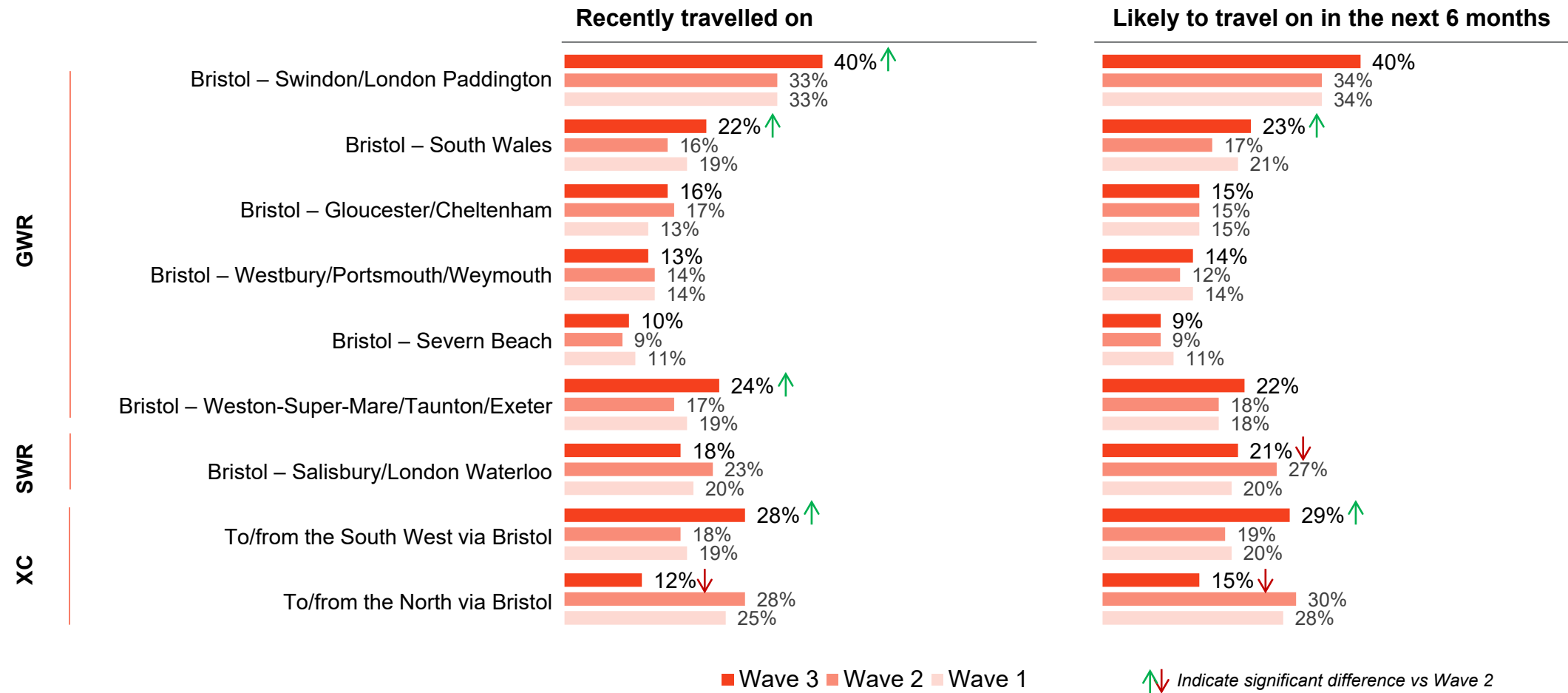
	Fieldwork Dates						
	W0	W1	W2	W3	W4	W5	Date of works
Bath Spa - 2015	n/a	20 Mar - 2 Apr	5 - 18 Jun	22 - 31 Jul, 4 - 14 Aug	-	n/a	18 Jul - 31 Aug
London Waterloo - 2016/17	n/a	23 Nov - 9 Dec	22 Feb - 12 Mar	19 May - 4 Jul	9 - 27 Aug	n/a	5 - 28 Aug
Derby - 2017/18	n/a	29 Nov - 14 Dec	8 Feb - 3 Mar	11 - 29 Jun	13 Aug - 13 Sept	n/a	22 Jul - 8 Oct
Brighton - 2018/19	23 - 27 April	8 - 18 May	8 Sep	29 Oct - 22 Nov	7 - 16 Jan	16 - 25 Feb	20 - 28 Oct 2018, 16 - 24 Feb 2019
King's Cross - 2019	n/a	1 - 17 Jul	24 - 26 Aug	n/a	n/a	n/a	24 - 26 Aug
West Coast Main Line – 2021*	n/a	9 - 16 Feb	4 - 11 May	n/a	n/a	n/a	2 Apr - 31 Aug

Type of passenger and the impact of COVID

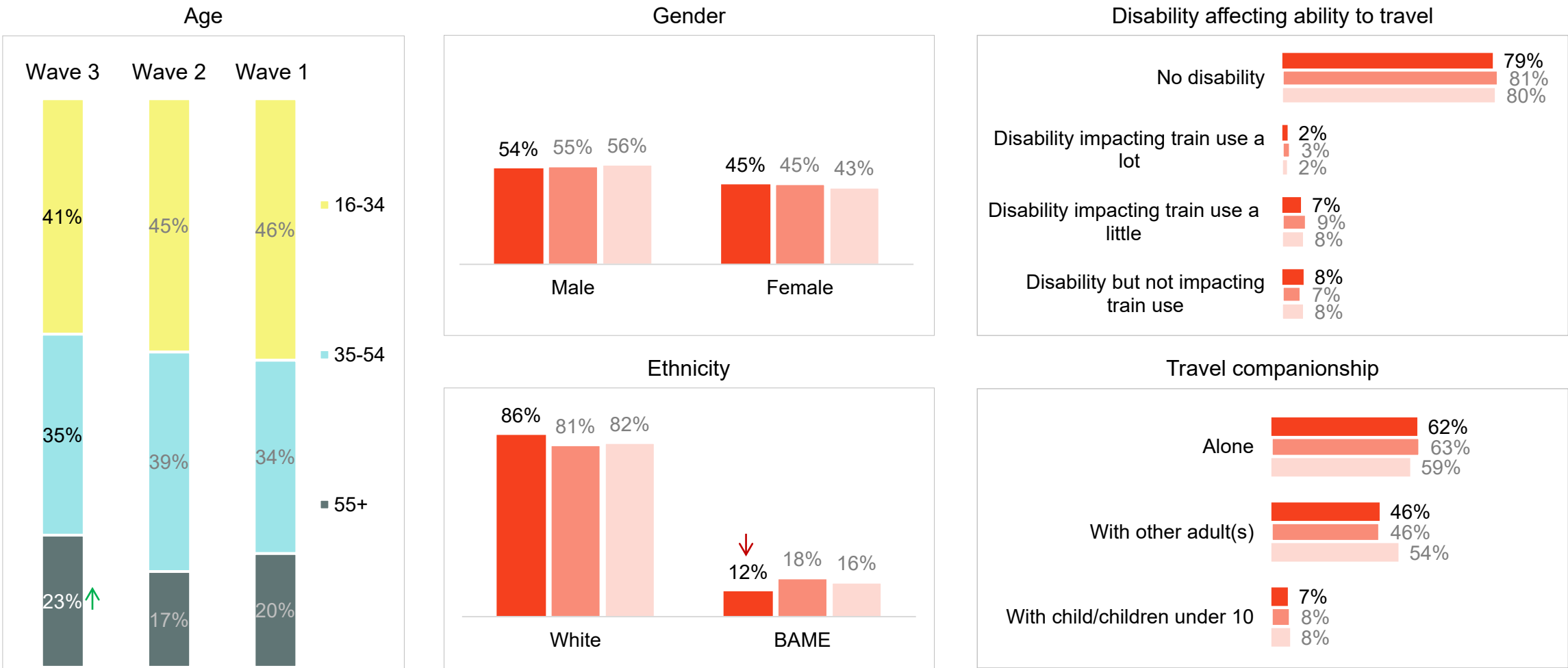
SECTION 1

Since Wave 2, there have been some significant shifts across the routes that passengers have travelled on recently and are likely to travel on in the next six months to, from, or through Bristol

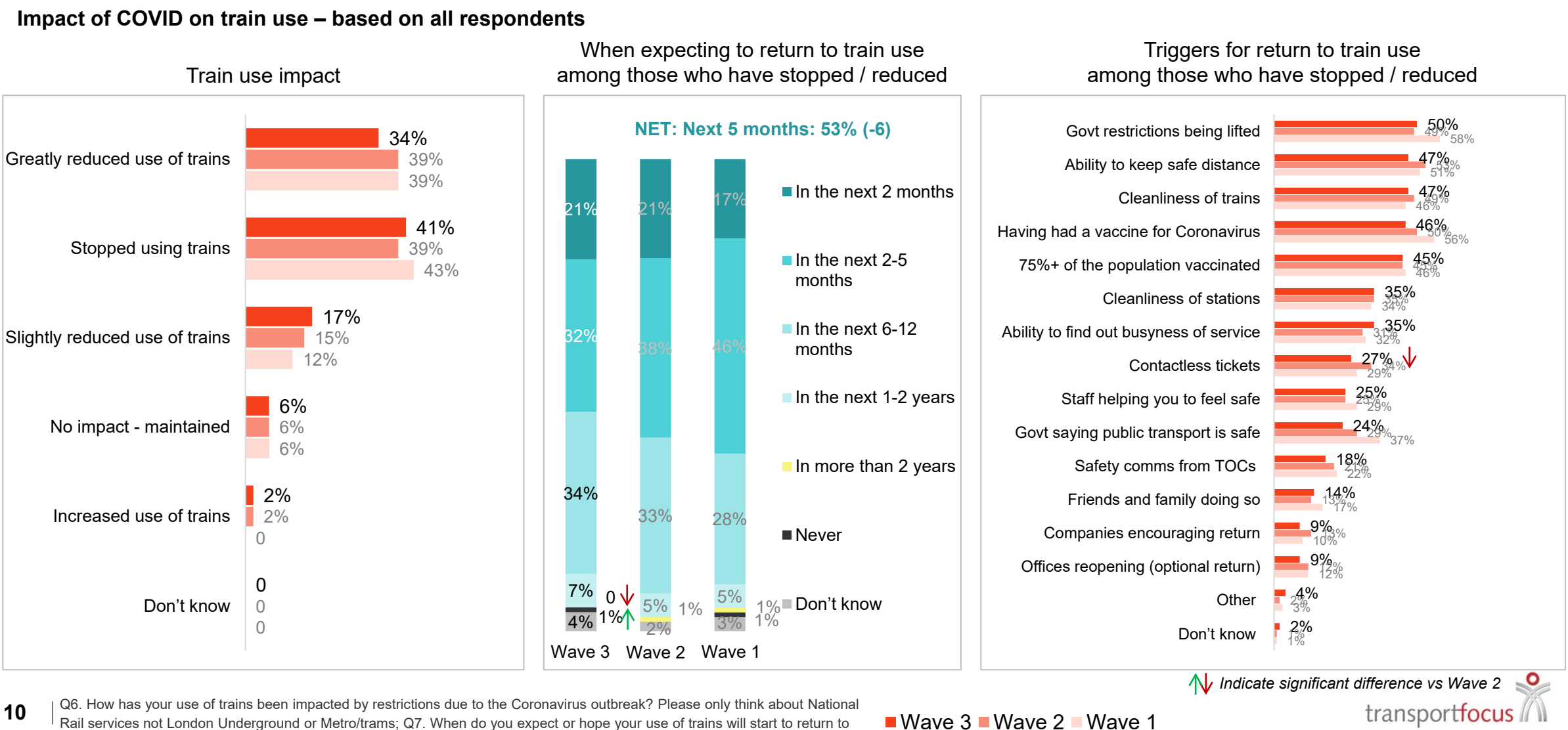
Routes recently used and likely to use



The passenger profile of those who travelled via Bristol recently and are likely to do so in the next six months is similar to Waves 1 and 2



Timeframes for starting to return to normal train use remain similar to Waves 1 and 2. Top triggers for return also remain similar with the lifting of restrictions having the greatest influence

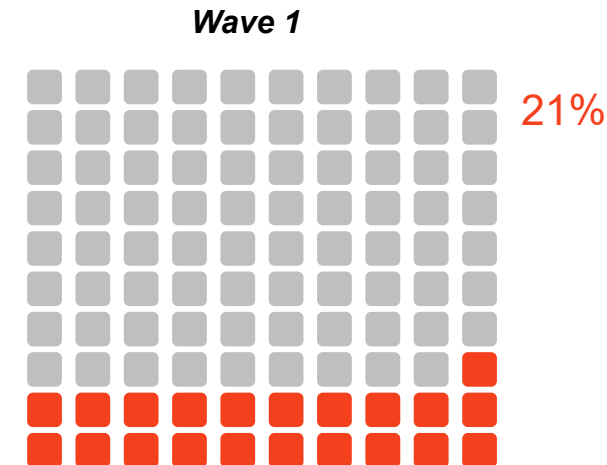
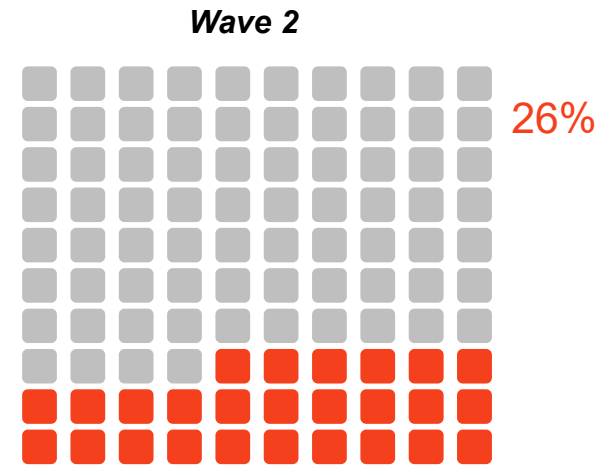
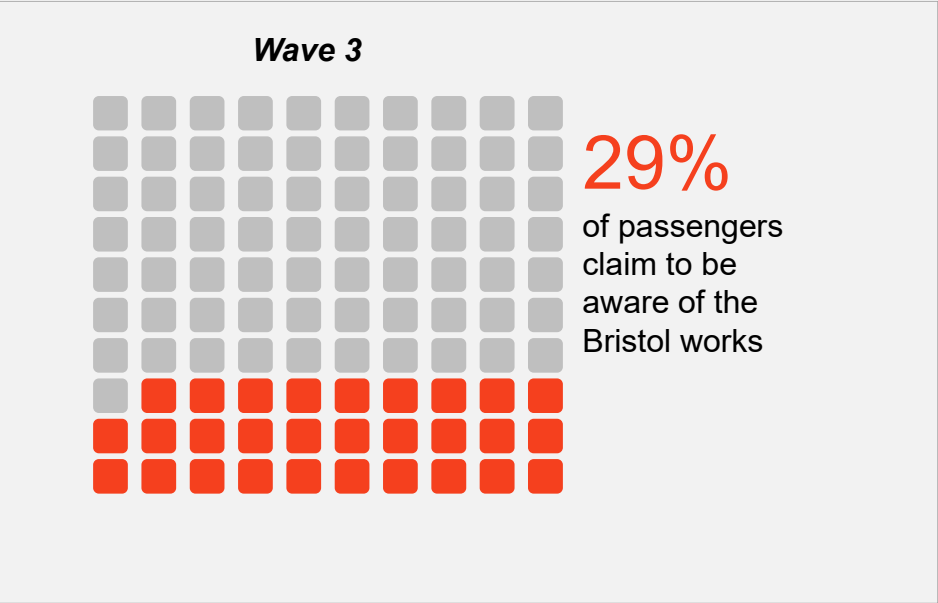


Awareness and understanding

SECTION 2

Spontaneous awareness of the works in Bristol continues to show signs of improvement; the increase since Wave 2 is not significant, however, and awareness remains lower compared to other studies

Spontaneous awareness – based on all respondents



Benchmarks*	W1	W2	W3
Derby	28%	47%	63%
London Waterloo	41%	81%	88%
Bath Spa	42%	67%	84%
King's Cross	33%	77%	n/a
Brighton	45%	50%	88%
WCML	29%	38%	n/a

12 | *Please find details of these studies and differences in methodology in the introduction section (slide 4)
Q18. Before today, were you aware of these infrastructure works in Bristol?
Base: W1/W2/W3 All respondents (407/406/420)

Awareness remains high among passengers who have travelled via Bristol more recently and has increased significantly among those who travel via Bristol more frequently

Spontaneous awareness by subgroups – based on all respondents

Thank you for your patience throughout our work.

Please bear with us and remember to check before you travel.



Get the latest travel updates: nationalrail.co.uk or GWR.com/Bristol

For more information visit networkrail.co.uk/bristolrailregen or call our 24 hour helpline: 03457 11 41 41



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Excuse our appearance while we transform Bristol Temple Meads.

We're restoring our roof, rewiring the station and laying new tracks, to make Bristol Temple Meads even better than ever.



Regenerating Bristol's iconic station.




Part of a bigger plan for Bristol Temple Meads and our region

Our new roof and tracks kick start the transformation of Bristol Temple Meads into a world class transport hub.

Over the next few years there are a range of improvements planned, including new entrances, more places to shop and better spaces for onward transport connections.

There are also plans for new stations and local services too, which you can read more about in the railway projects section of the Travelwest website: tinyurl.com/TWBristolRailRegen

Brand new tracks. Better journeys.



We're replacing the tracks outside the station


From 10 July to 3 September we'll be replacing tracks on the approach to the station. It's a big job, taking about eight weeks.

The brand new tracks in a clever new layout will allow trains to come in and out of the station more easily, meaning less delays and better journeys all round.

While this work is taking place, we'll make sure you can still get wherever you're going.

Some trains will be diverted and others will be replaced by buses. Please keep checking nationalrail.co.uk or GWR.com/Bristol for updates.

Brand new roof. Brighter station.



We're restoring our fabulous Grade I listed roof


Over the next couple of years, our specialist teams will be repairing, painting and glazing our iconic station roof. The result will be a brighter and more welcoming station, beautifully preserved for generations to come.

A large safety screen will protect customers and staff from the work going on above. It will be held up by scaffolding towers that we are installing along platforms 3 – 6.

We're rewiring the station

A complete rewiring of Bristol Temple Meads starts later this year. It will improve the reliability and efficiency of the station's electrical systems.

Alongside the rewiring, we will be installing new customer information screens, improved public announcement systems and CCTV, as well as a new WiFi network.



For more information visit networkrail.co.uk/bristolrailregen [#BristolRailRegen](https://twitter.com/BristolRailRegen)

53% (-4)

of passengers who travelled via Bristol in the last month claim to be aware of the works vs 29% (+4) of those who travelled 2-12 months ago

57% (+12)↑

of passengers who travel via Bristol at least monthly claim to be aware of the works vs 22% (+2) of those who travel less than monthly

Figures in brackets indicate change vs Wave 2
↑↓ Indicate significant difference vs Wave 2

When prompted, a third of passengers recall seeing at least one of the two specific communications about Bristol works, although there may be some misattribution for communication B

Prompted recall of specific comms – based on all respondents

Communication A (NR)

18%
of passengers recall seeing this



Communication B (GWR)

30%
of passengers recall seeing this
or something very similar



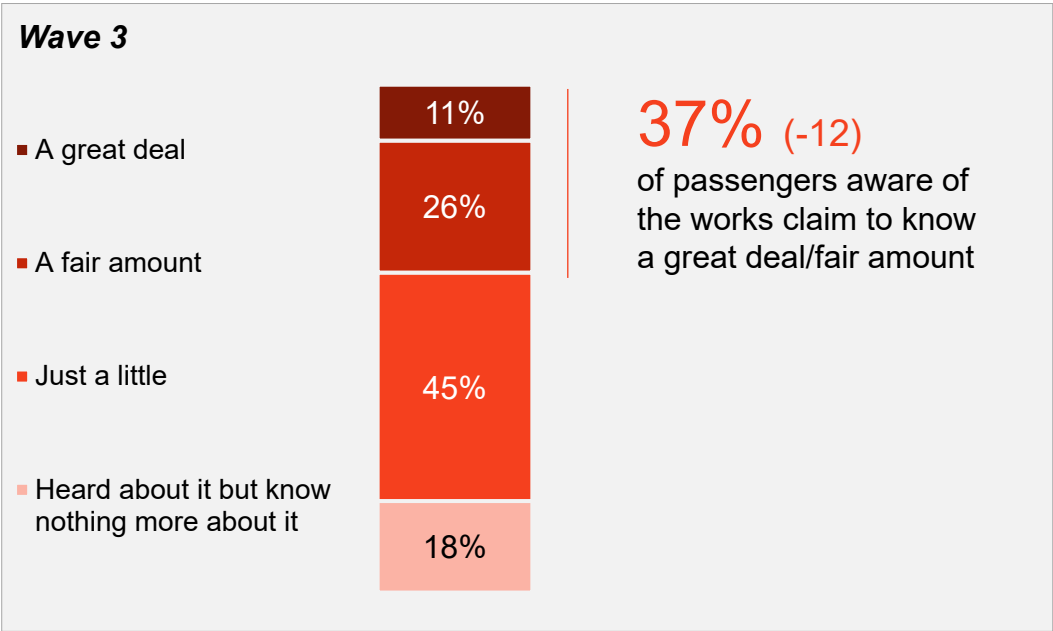
34% of passengers have seen at least one of these communications – 67% of those aware of the works versus 20% of those not aware of the works

Benchmarks from other NR studies – recall among regular passengers: OOH campaign 13% | 'Check Before you Travel' ads 19%

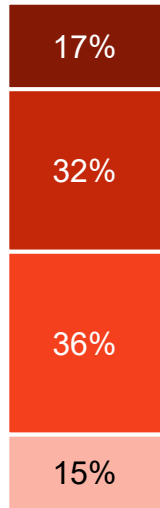
Q33a. Before we ask a few questions to understand the sort of passengers who have taken part, in a final question about the Bristol works we would like to know whether you recall having seen these two ads recently? Q33b. This is an example of a series of ads all for different routes but identical in appearance. Please answer 'Yes' if you have seen this version or a similar one for another route.
Base: W3 All respondents (420)

Knowledge among those aware of the works has declined sharply but not significantly; only a third of those aware of the works know a great deal or fair amount about it

Level of knowledge – based on all aware

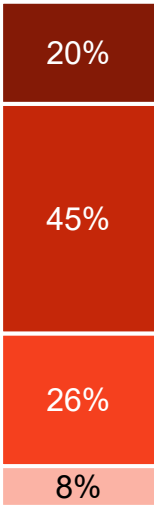


Wave 2



49%

Wave 1

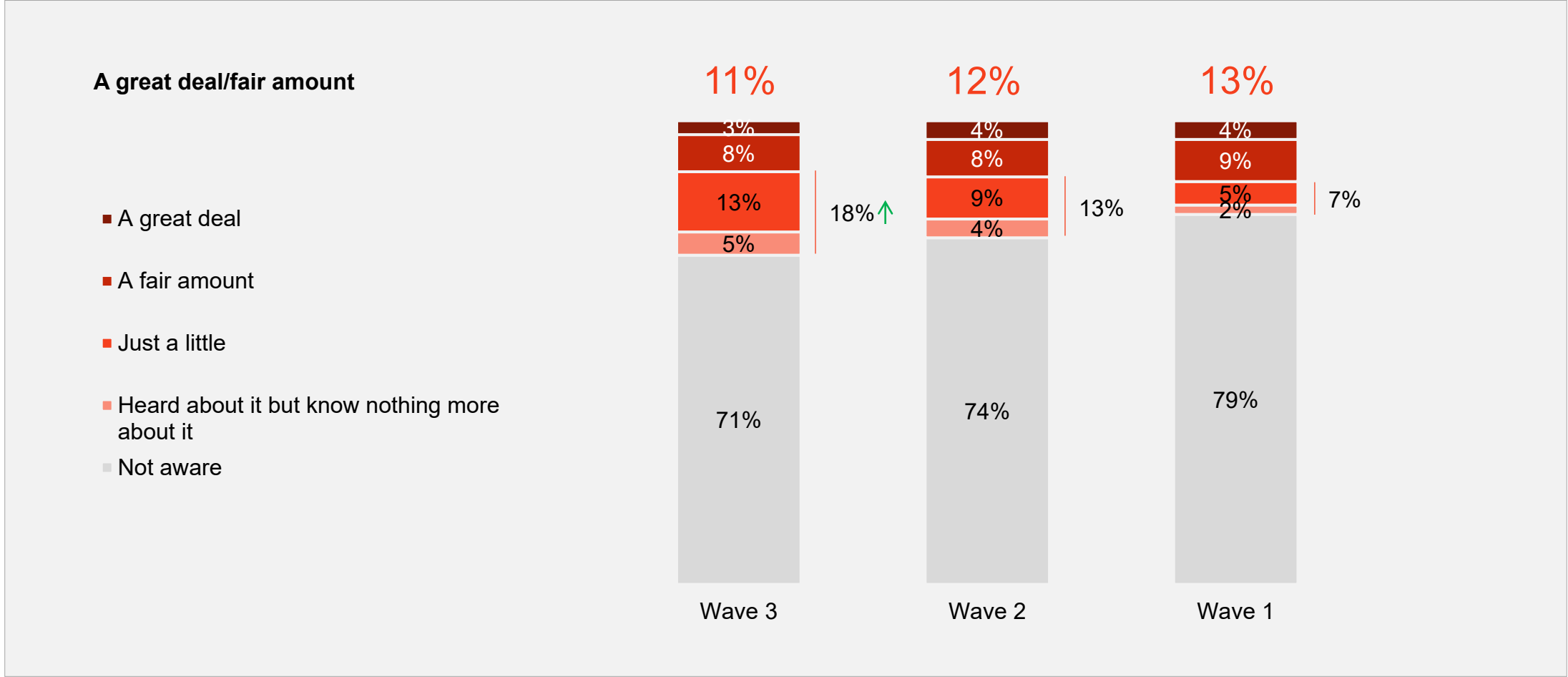


65%

Benchmarks*	W1	W2	W3
Derby	31%	47%	55%
London Waterloo	17%	36%	38%
Bath Spa	34%	49%	n/a
King's Cross	25%	30%	n/a
Brighton	34%	18%	47%
WCML	52%	53%	n/a

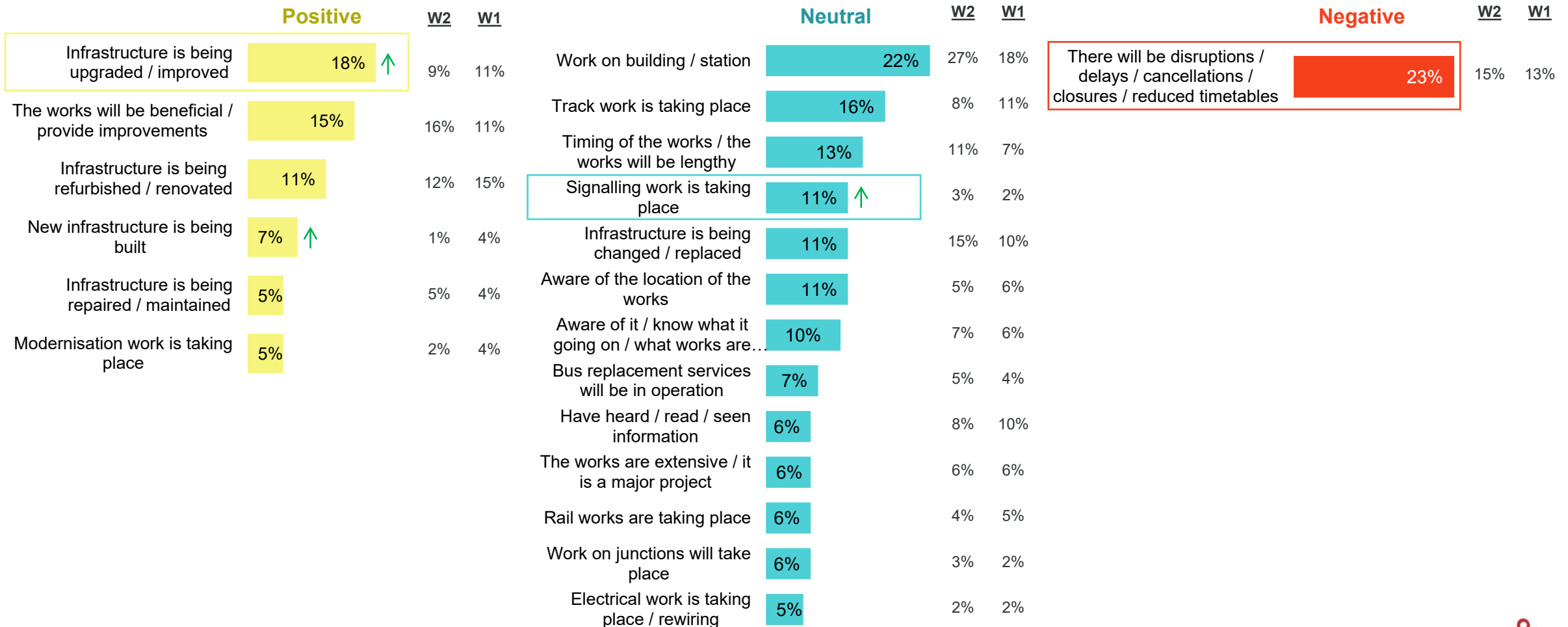
Among all passengers, knowledge about the works remains similar to Waves 1 and 2; the greatest increase is among passengers who know just a little about the works or have only heard about them

Level of knowledge – based on all respondents



There have been significant increases in spontaneous mentions of the works as an upgrade and of the signalling work. Nearly a quarter mention disruptions associated with the works

What passengers know about the works (spontaneous) – based on all aware



Most passengers who mention disruptions anticipate long-term benefits from the works

What passengers know about the works (spontaneous) – based on all aware

Infrastructure is being upgraded / improved (positive)

“That the whole station is being **upgraded** including the **roof** and undergoing major changes to make it **more climate friendly**”

“The diversion will **improve the quality and safety** of the use of trains over time, although we have to **pay the price of taking buses now**”

“They are **improving tracks and signalling** to **ease congestion** in the area and eventually be able to provide **more train services**”

Work on building / station (neutral)

“**Improving facilities and access at the station**, including renovations and a new roof”

“That they are planning to **modernise the station area** and **improve the roof**”

“**Station refurbishment** started a while ago. I saw something on the local news about **signalling and improvements at Bristol East** to improve the capacity of the lines”

There will be disruptions / delays / cancellations / closures / reduced timetables (negative)

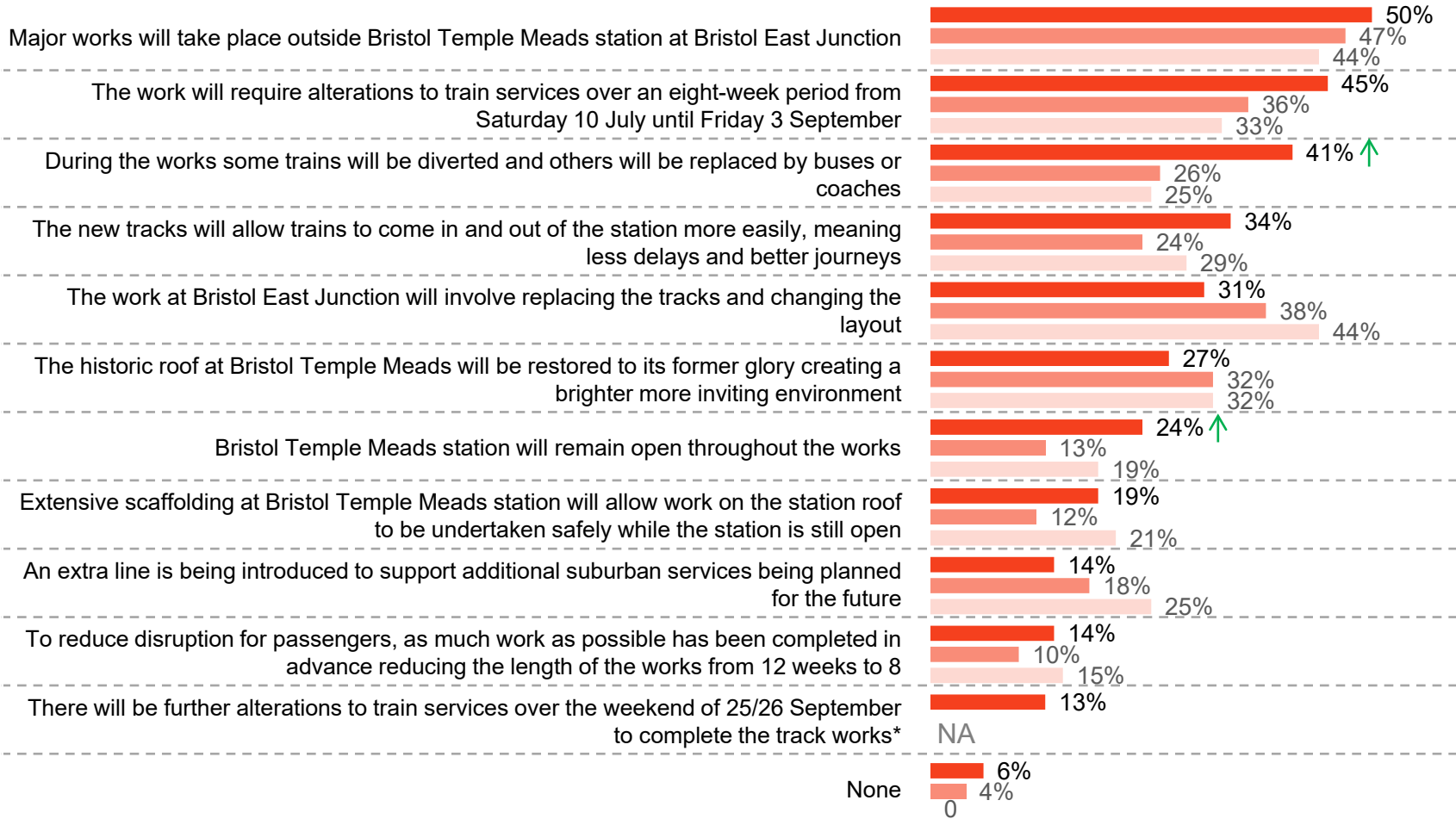
“I think the tracks and signalling in the area are **being improved** and that there are engineering works at one or more of the junctions. There will be bus replacement services along the route and **journeys will be longer**”

“I know there is going to be lots of work going on. **Using bus and coach replacements** seems fair as the work is being **done to improve the train network**”

“There will be **disruptions to the services** through Bristol throughout the summer months while the old points and lines around Bristol Temple Meads are replaced”

There has been a significant increase in prompted awareness of diversions and rail replacements suggesting that communications about disruptions are cutting through

Understanding implications of the works – based on all aware

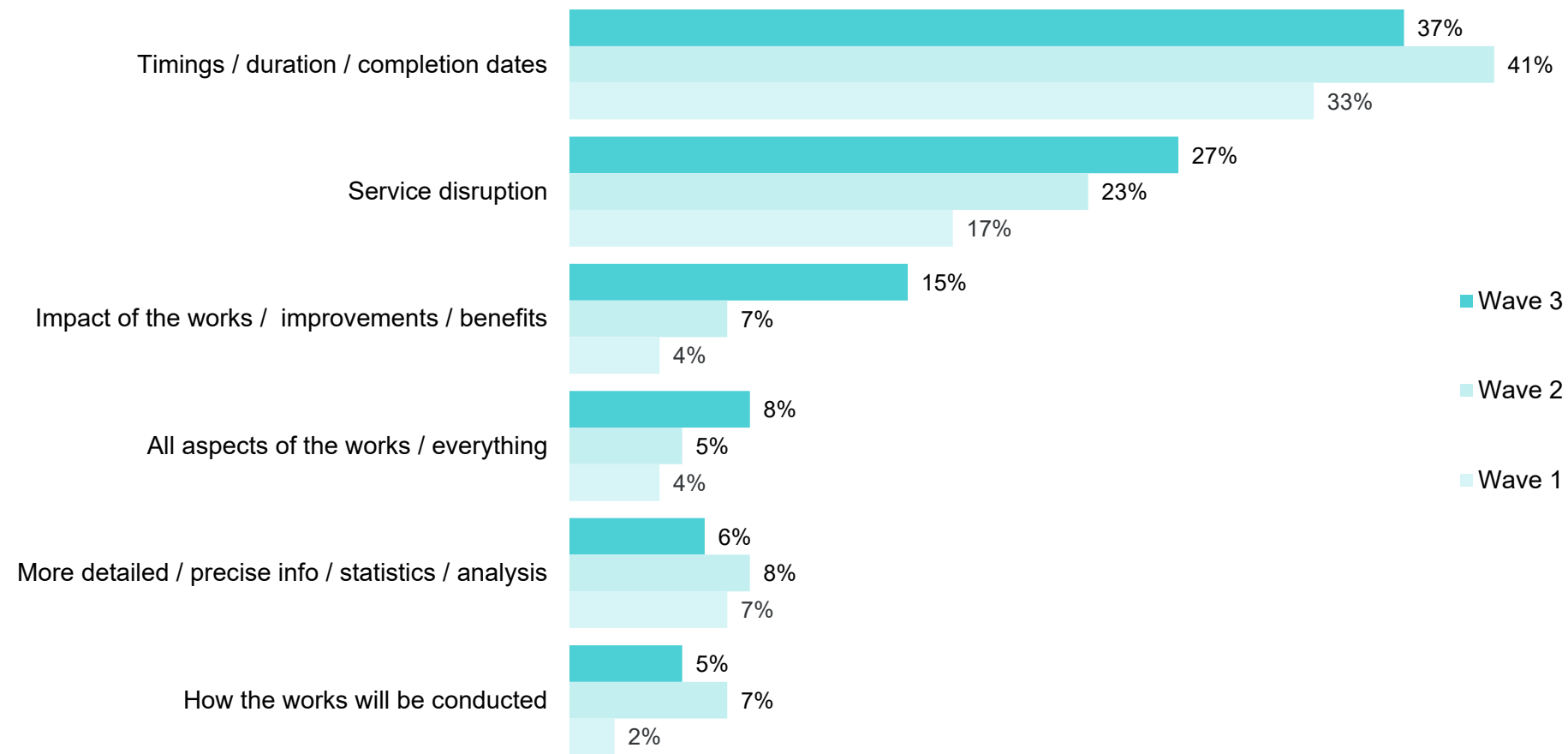


Only 13% of passengers aware of the works are aware of further alternations to train services in September

↑↓ Indicate significant difference vs Wave 2

However, similar to Waves 1 and 2, passengers continue to want to know more about service disruptions as well as the timings and duration of the works

What else would passengers like to know (spontaneous) – based on all aware



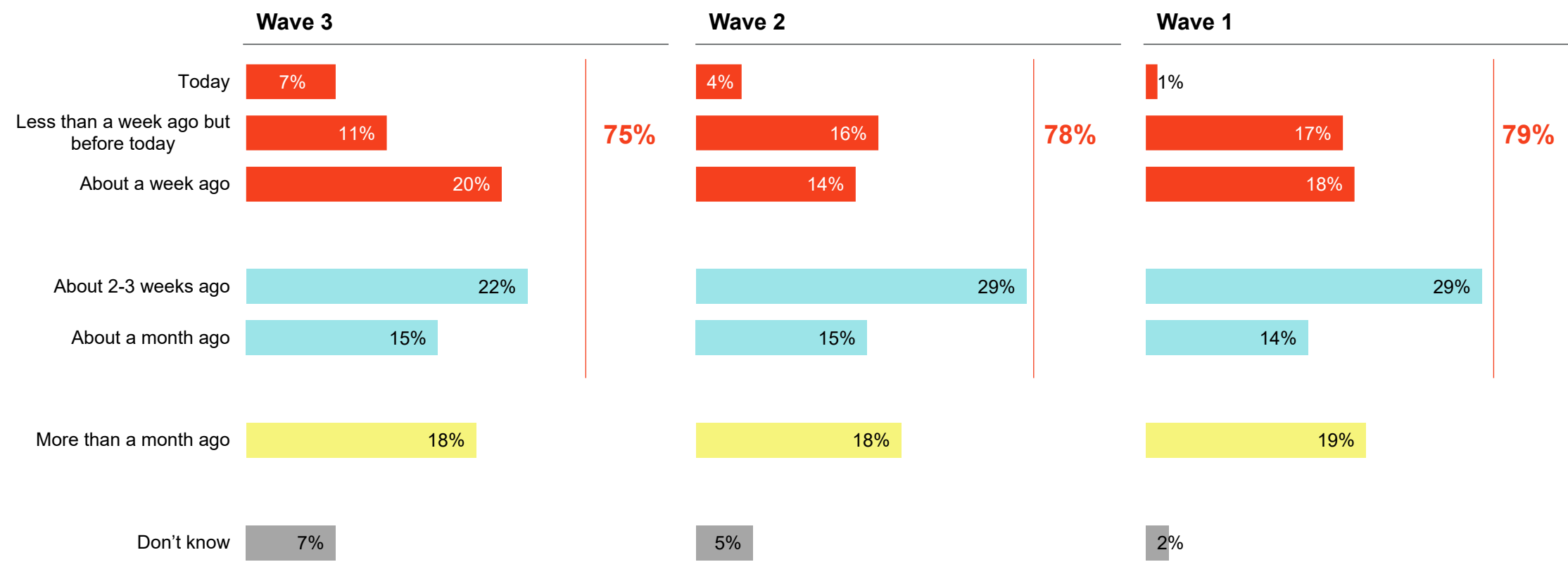
Passengers want to know the potential impact of the works on their journeys – both in terms of disruptions but also eventual benefits

What else would passengers like to know (spontaneous) - based on all aware

<i>Timings / duration / completion dates (37%)</i>	<i>Service disruption (27%)</i>	<i>Impact of the work / improvements / benefits (15%)</i>
<p>"I can't remember the dates this is happening, so it would be good to make the dates more pronounced, or easier to remember e.g. "Early July" rather than "4th to 14th"</p>	<p>"Exactly how much effect there will be on regular train journeys. Details of altered times or cancelling"</p>	<p>"It would be useful to quantify the expected benefits - how many delays are they expected to be eliminated, how much time (if any) will it cut off average journeys into Bristol Temple Meads"</p>
<p>"How frequently services will run from Bristol Temple Meads to Cardiff Central and when the work is expected to be finished"</p>	<p>"How it's going to impact my travelling. If I'm paying a ticket price for a train, and am switched to a coach, I'd like to know why I shouldn't just use a bus/coach company and save money"</p>	<p>"Full effect on train services including short term disruption and longer-term benefits"</p>
<p>"Impact on journeys presented in a calendar format (potentially colour coded by days indicating the extent of impact) rather than just a list"</p>	<p>"How much disruption it is going to cause. I understand there will be replacement bus services at the end of the summer but I'm not sure if that is something to do with Bristol East"</p>	<p>"How much of the contracting is going to local businesses and how exactly will the customer benefit, especially considering value for money"</p>

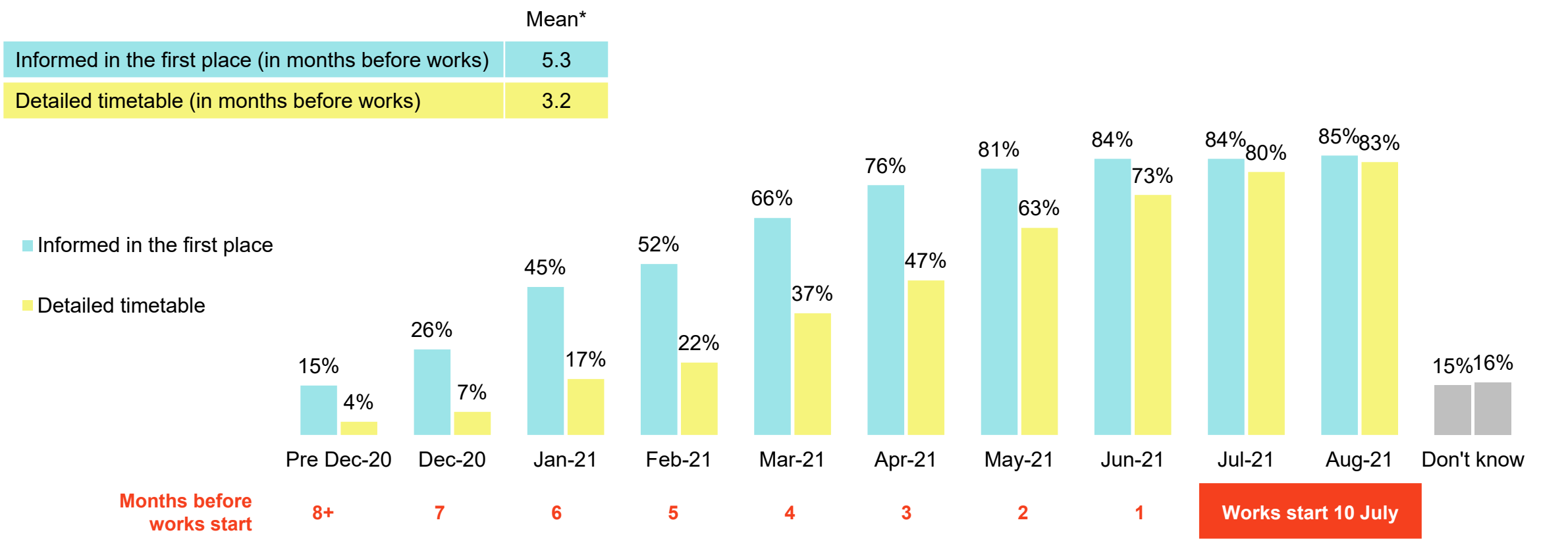
The profile of when passengers found out about the works has been fairly consistent across waves with most finding out within a month before the survey

When passengers found out about the works – based on all aware



Half of passengers expect to find out about works in the first place five or more months before. Two thirds expect the timetable to be available two months in advance

When passengers would like to be informed about the works (cumulative percentage) – based on all respondents



New question therefore not comparable to previous waves

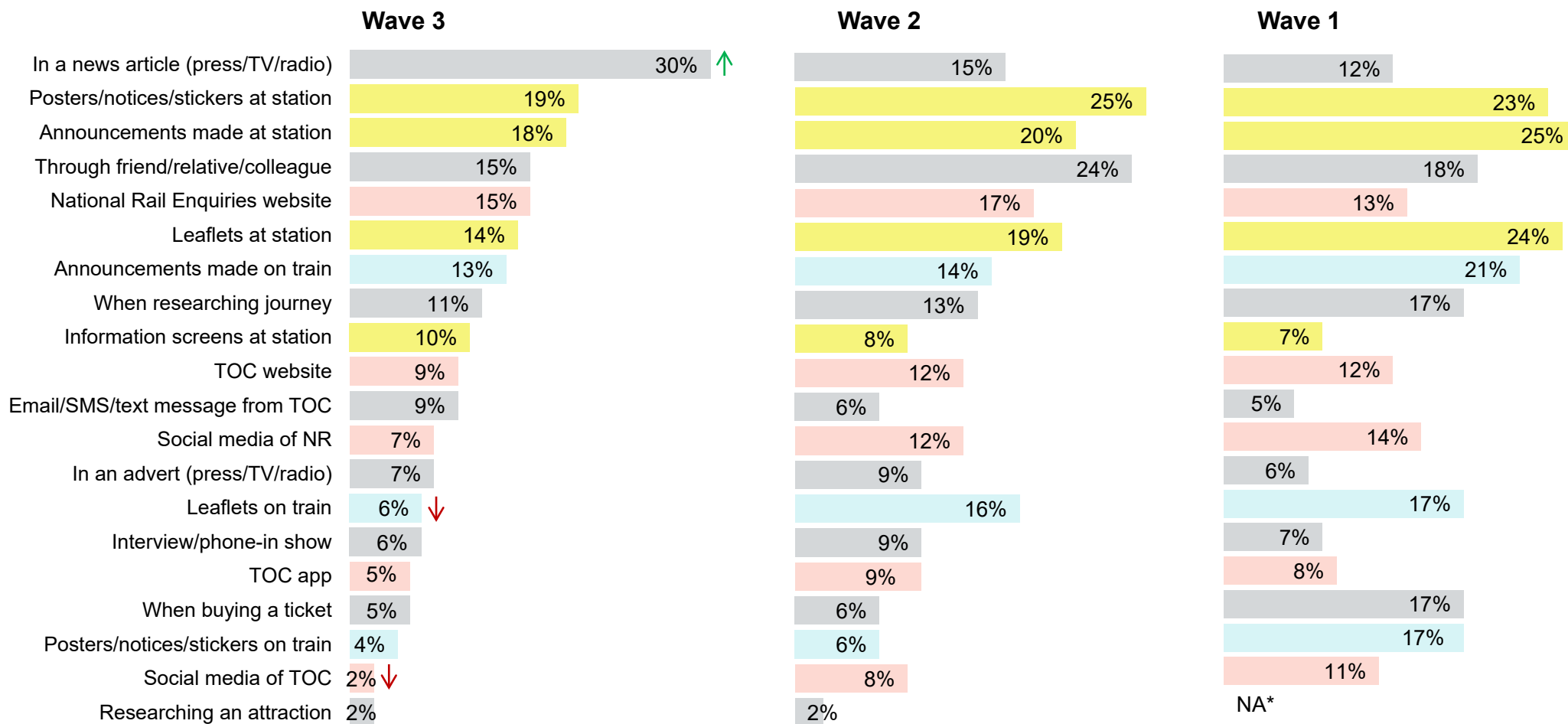
*'Don't know' responses excluded
Q33. While the railway knows it will be carrying out improvement works well in advance, it often doesn't know the detail of the timetable until much later. In the case of works like those taking place in Bristol, firstly, how far in advance would you have expected to be informed that there was going to be disruption and, secondly, how far in advance would you expect the detailed timetable to be published?
Base: W3 All respondents (420)

Information channels

SECTION 3

Compared with previous waves, passengers aware of the works are significantly more likely to have found out through press and TV news

How passengers found out about the works – based on all aware



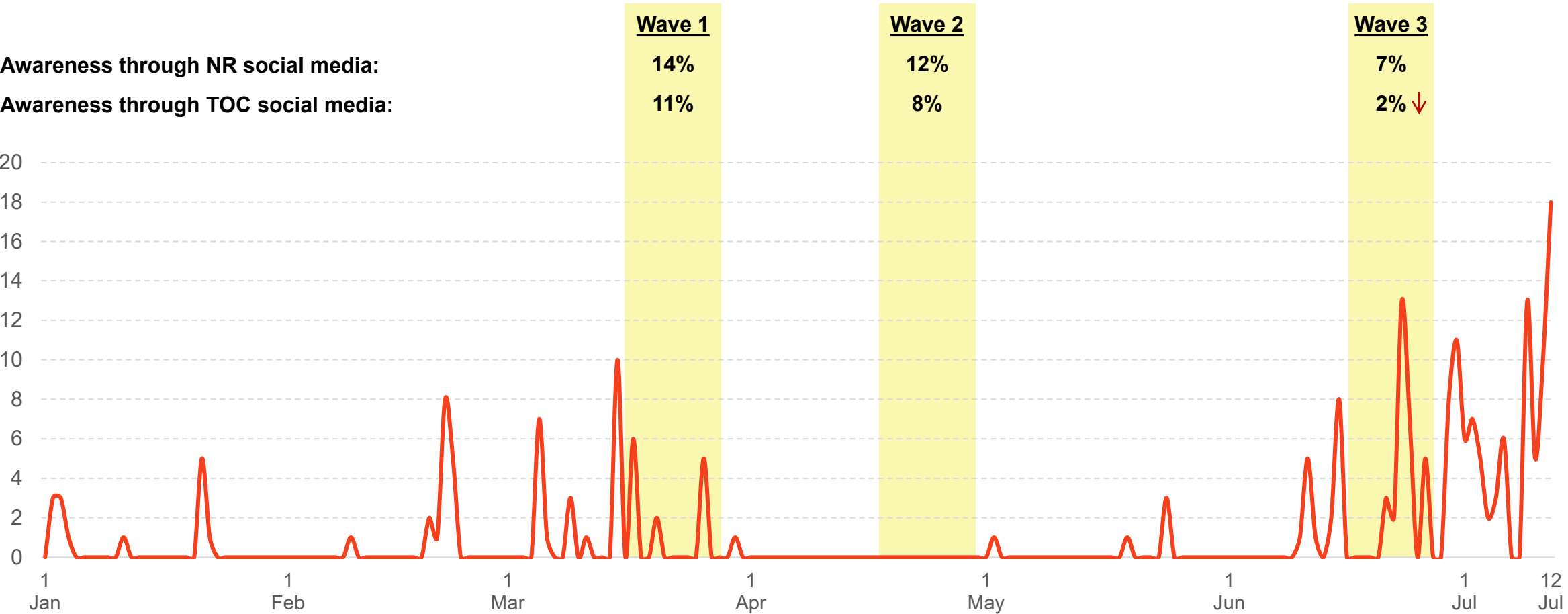
*Code not included in Wave 1

Q23. In which of the following ways did you find out about the works in Bristol?
Base: All aware of works W1/W2/W3 (87/106/123)

↑↓ Indicate significant difference vs Wave 2

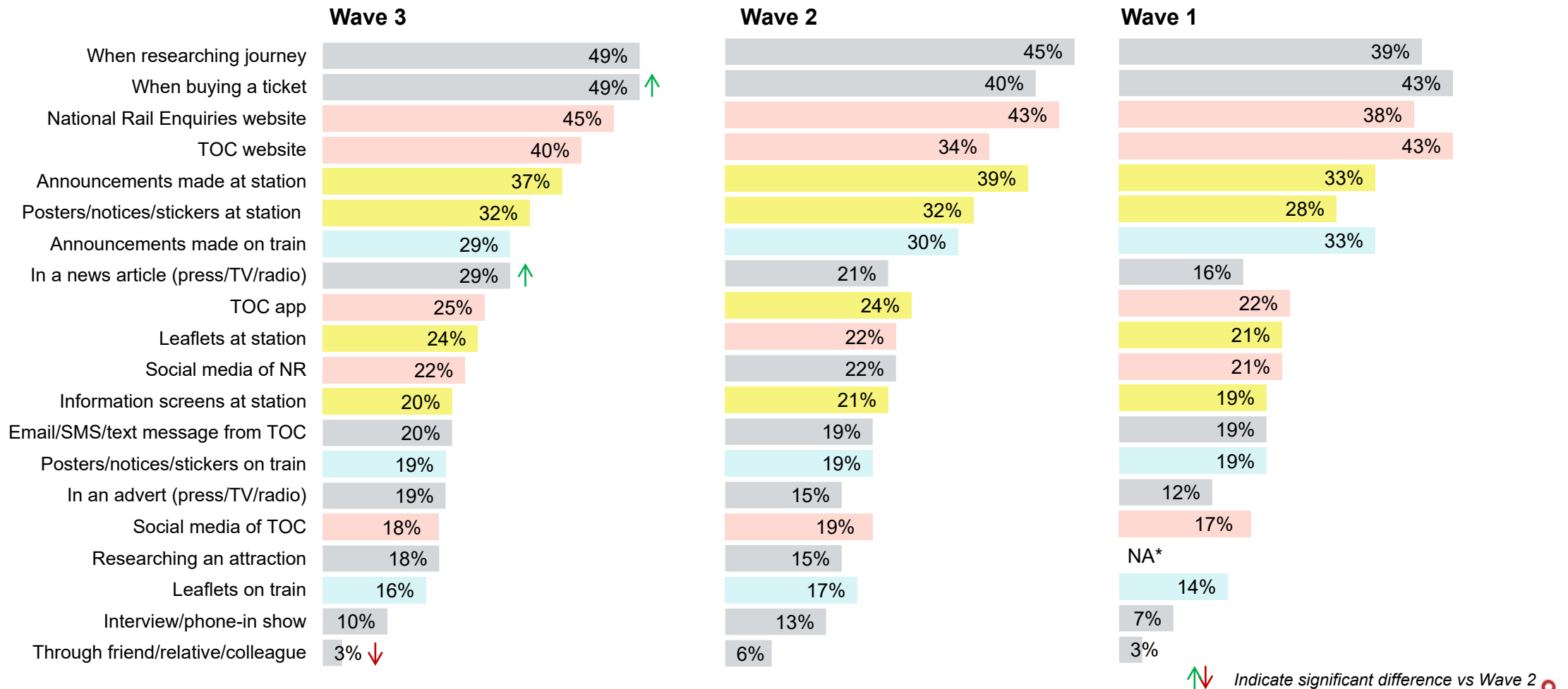
Awareness of the Bristol works through social media channels has declined, significantly through TOCs. This may be due to lack of activity in the months prior to Wave 3 fieldwork

Frequency of #BristolRailRegen on Twitter across 2021: total 213 tweets

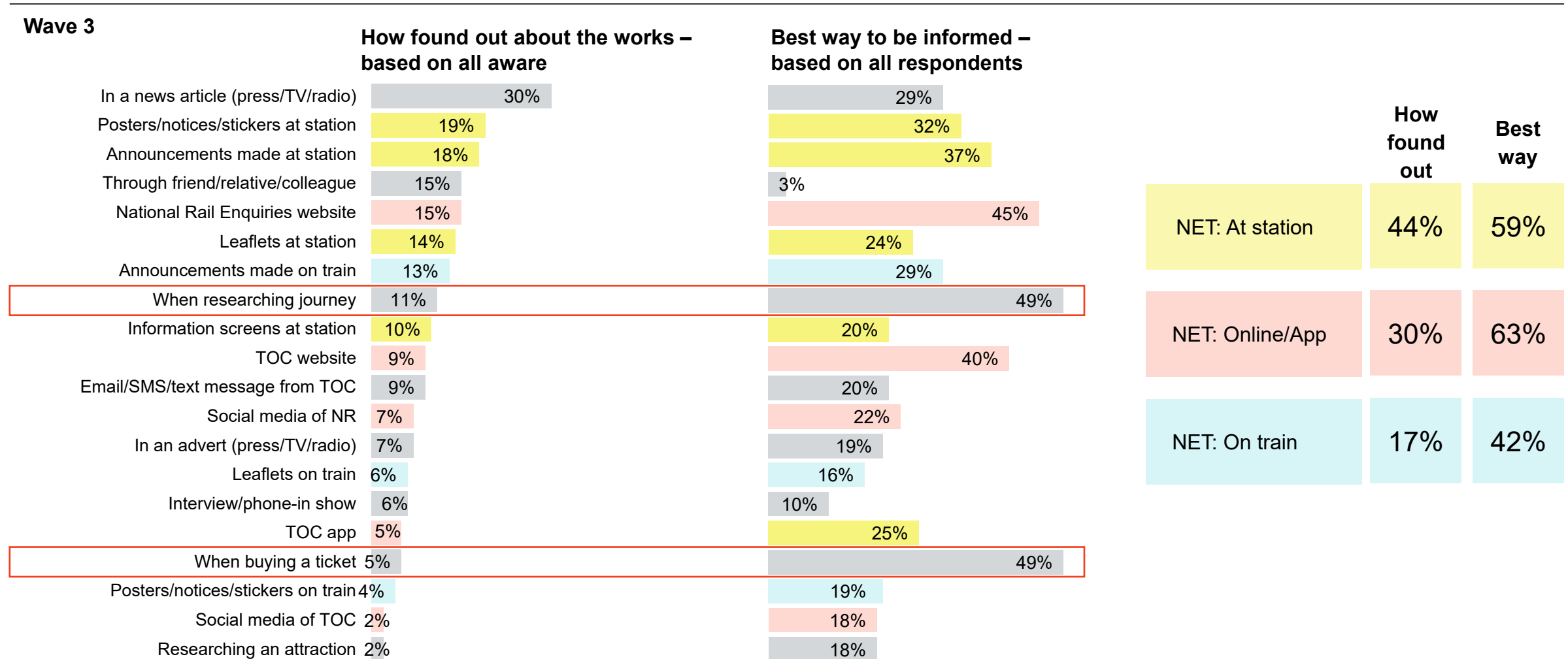


In terms of the best ways to find out, press and TV news has become increasingly important. When researching a journey and buying a ticket continue to be most important, the latter increasingly so

Best way to be informed – based on all respondents

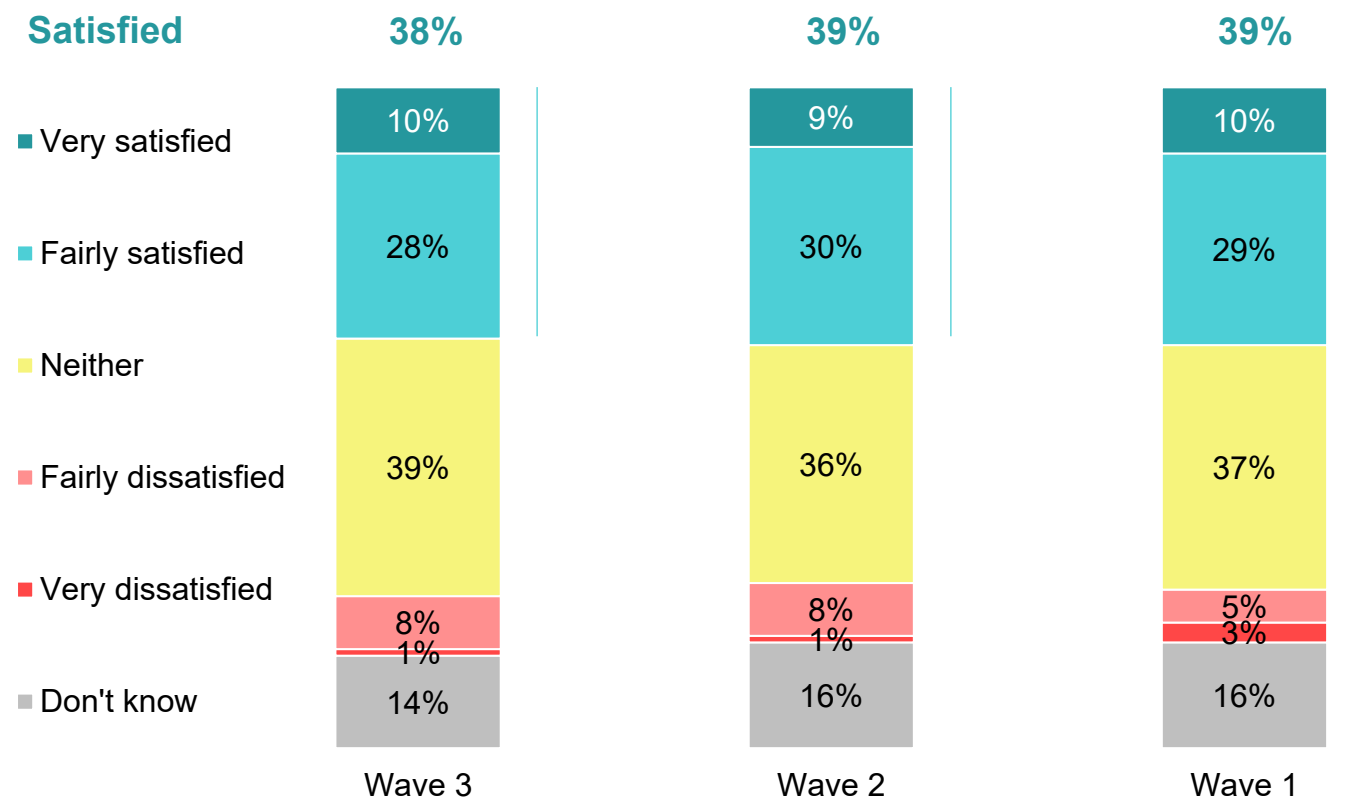


However, awareness through researching a journey or buying a ticket continues to be low



Satisfaction with the information provided remains at two fifths and is now lower than other benchmark projects, which all increased between waves

Satisfaction with information – based on all respondents



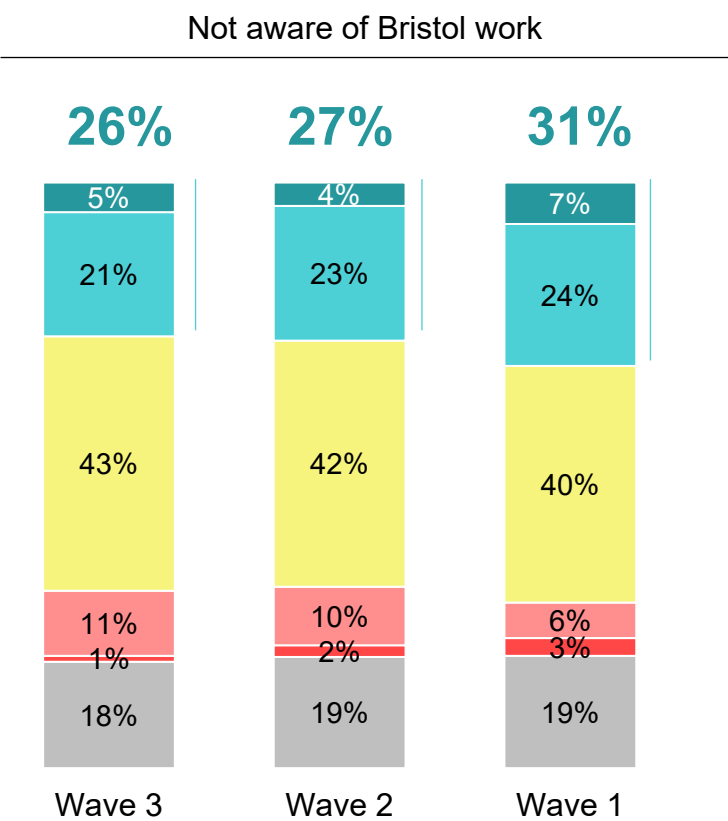
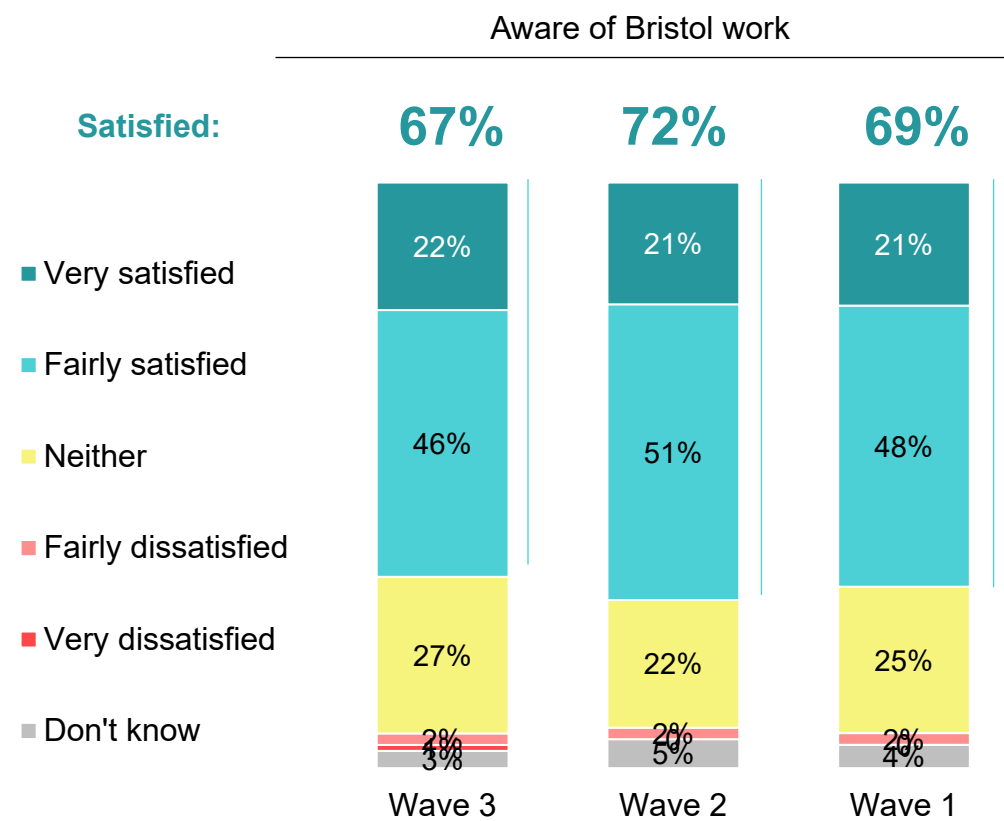
Benchmarks*	W1	W2	W3
Derby	14%	30%	43%
London Waterloo	16%	35%	42%
Bath Spa	19%	35%	62%
King's Cross	23%	48%	n/a
Brighton	16%	21%	43%
WCML	48%	52%	n/a

*Please find details of these studies and differences in methodology in the introduction section (slide 4)
Q27. Overall, how satisfied or dissatisfied are you with the information currently being provided about the engineering works taking place in Bristol?
Base: All respondents W1/W2/W3 (407/406/420)

No significant differences vs Wave 2

As in Waves 1 and 2, satisfaction is linked to awareness and there have been no significant shifts within these groups

Satisfaction with information among those aware of the work



As in Waves 1 and 2, the main reason for dissatisfaction is not being aware of the works. Some are concerned about disruptions and resent the timing of the work as COVID restrictions start to ease

Reasons for dissatisfaction (spontaneous) – based on those dissatisfied with information

Fairly dissatisfied			Very dissatisfied
<p>“I had no idea this was happening, and I may need to travel to Bristol at short notice in the next month or two. I would like to know how this will affect my journey as I would catch a local connecting train from Bristol Temple Meads”</p>	<p>“I hadn’t heard about them before today and I’ve been through that station recently”</p>	<p>“Because it is going to prevent me from using trains for a while as they might get replaced by buses. But I’m just ‘fairly dissatisfied’ as the engineering works are to improve the rails”</p>	<p>“They have been timed perfectly to disrupt people’s free time before we are put back into lockdown, and I have no doubt that it’s deliberate”</p>
<p>“I had no idea there were any works going to be ongoing. The thought of bus replacement isn’t great”</p>	<p>“I don’t believe that exact information has been released on when and what trains will be affected”</p>	<p>“This is the first I have heard of it, surely this work could have been done during lockdown”</p>	<p>“There is no information at all”</p>
<p>“Because I haven’t heard anything and it’s a pretty big station so should be more widely advertised”</p>	<p>“I have not noticed any public advertising. They need to advertise via a range of mediums across the South West to inform people of the plans”</p>	<p>“Well, it could have been done in lockdown rather than when we are escaping it”</p>	<p>“Because I have not received or seen any information on it. It is a major station, and the work will impact many people”</p>

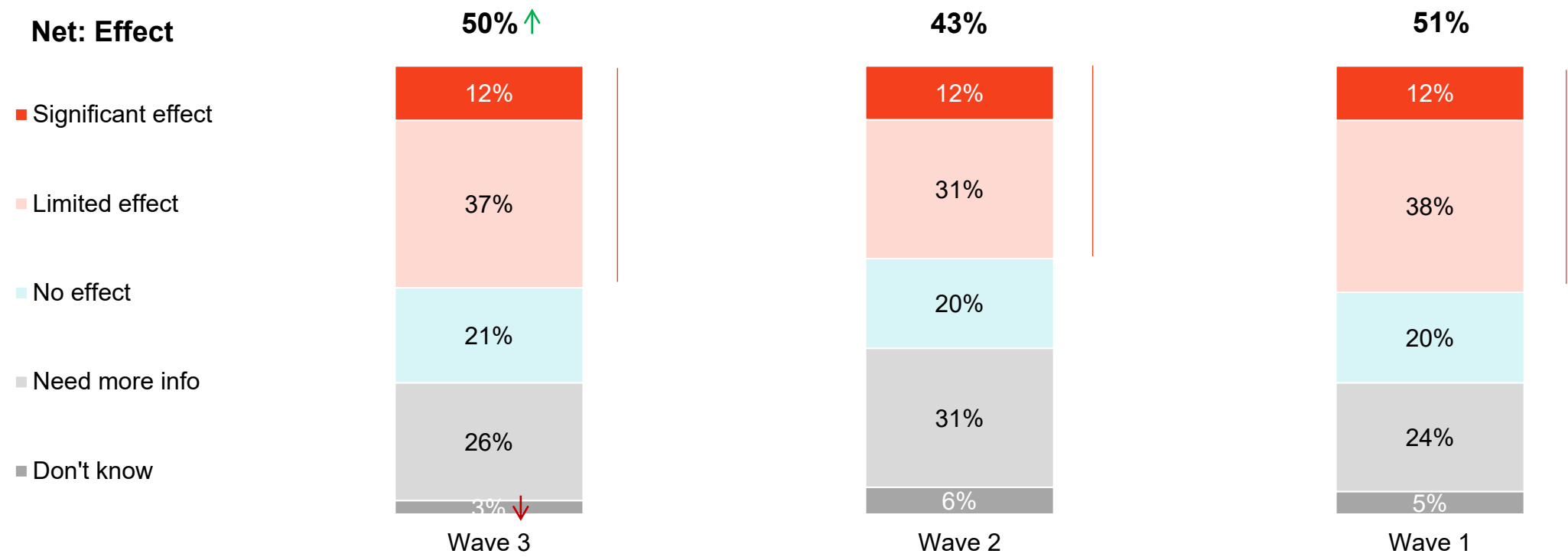
92% (-3) of those dissatisfied are not aware of the works

Expected impact, perceived benefits and support

SECTION 4

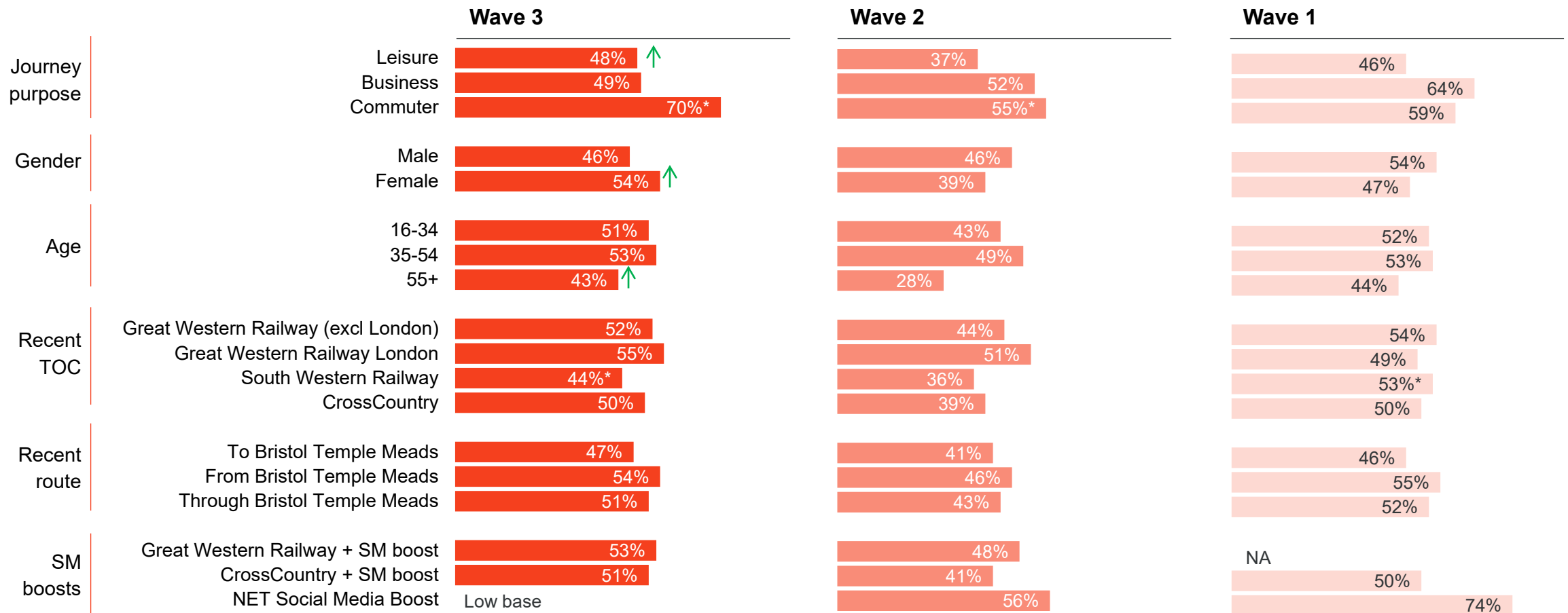
After a decline in Wave 2, significantly more passengers now expect the works to affect their travel plans, in line with Wave 1

Effect on travel plans – based on all respondents



Leisure passengers, females and passengers over 55 are significantly more likely to be expecting their travel plans to be affected compared to Wave 2

Effect (significant/limited) on travel plans by subgroups – based on all respondents



*Caution, base below n=50

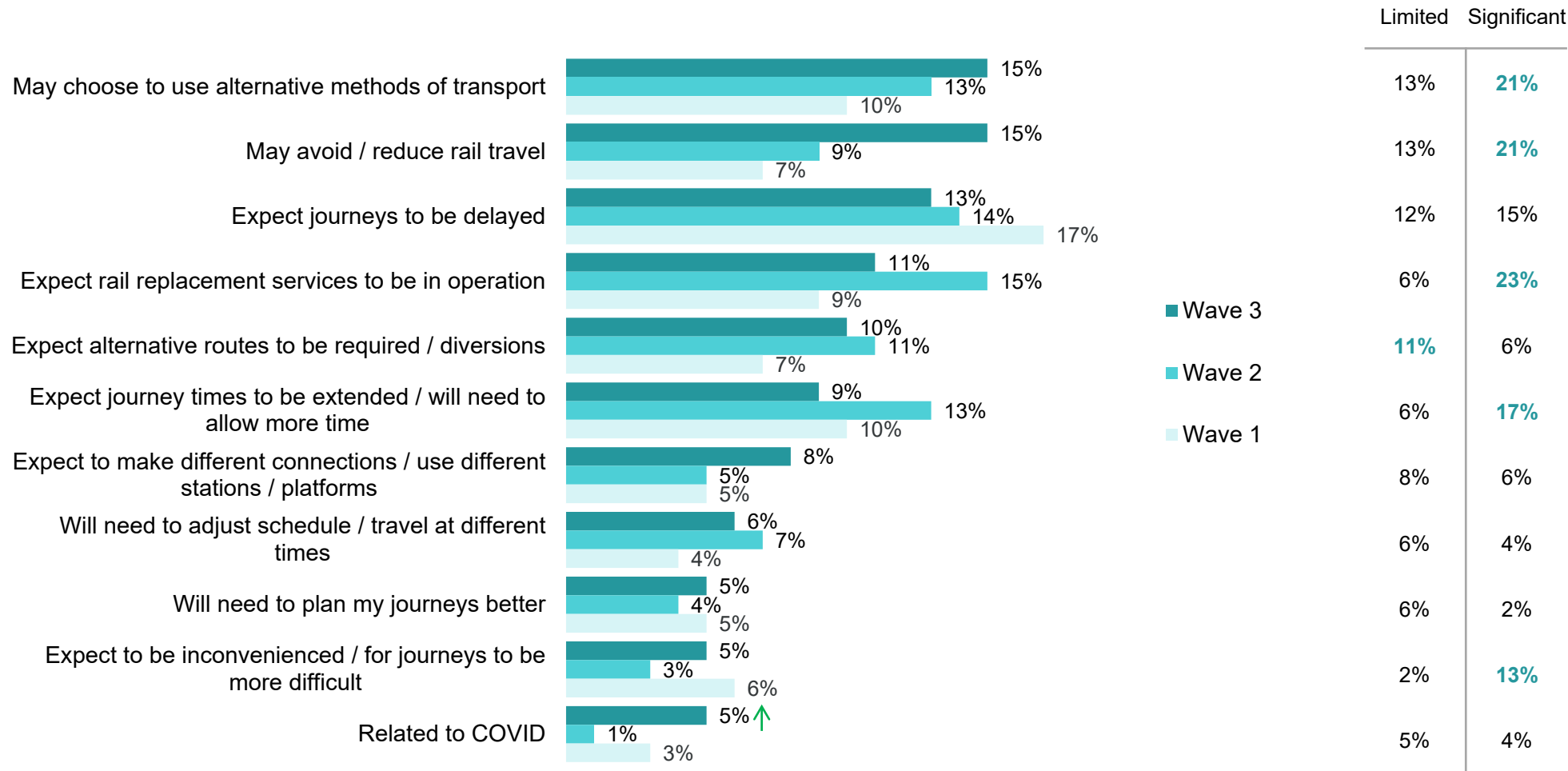
Q25. Based on what you now know, to what extent do you think the engineering works in Bristol will affect your travel plans for spring/summer 2021?

Base: All respondents W1/W2/W3 (407/406/420); Leisure (268/248/286), Business (70/102/78), Commuter (61/47/47); 16-34 (188/181/174), 35-54 (139/157/148), 55+ (80/68/98); Male (228/222/226), Female (177/183/191); GWR excl London (176/151/205), GWR London (99/110/122), SWR (49/55/43), XC (128/140/101); To Bristol (140/149/154), From Bristol (75/56/82), Through Bristol (192/201/184); GWR + SM boost W2 (NA/291/311), XC + SM boost (158/164/109), NET SM boost (54/59/12)

↑↓ Indicate significant difference vs Wave 2

Among those expecting to be affected, details remain similar to Wave 2 with signs of passengers increasingly planning to choose alternative methods and avoid or reduce rail travel

Details of effect on travel plans (spontaneous) – based on significant/limited effect



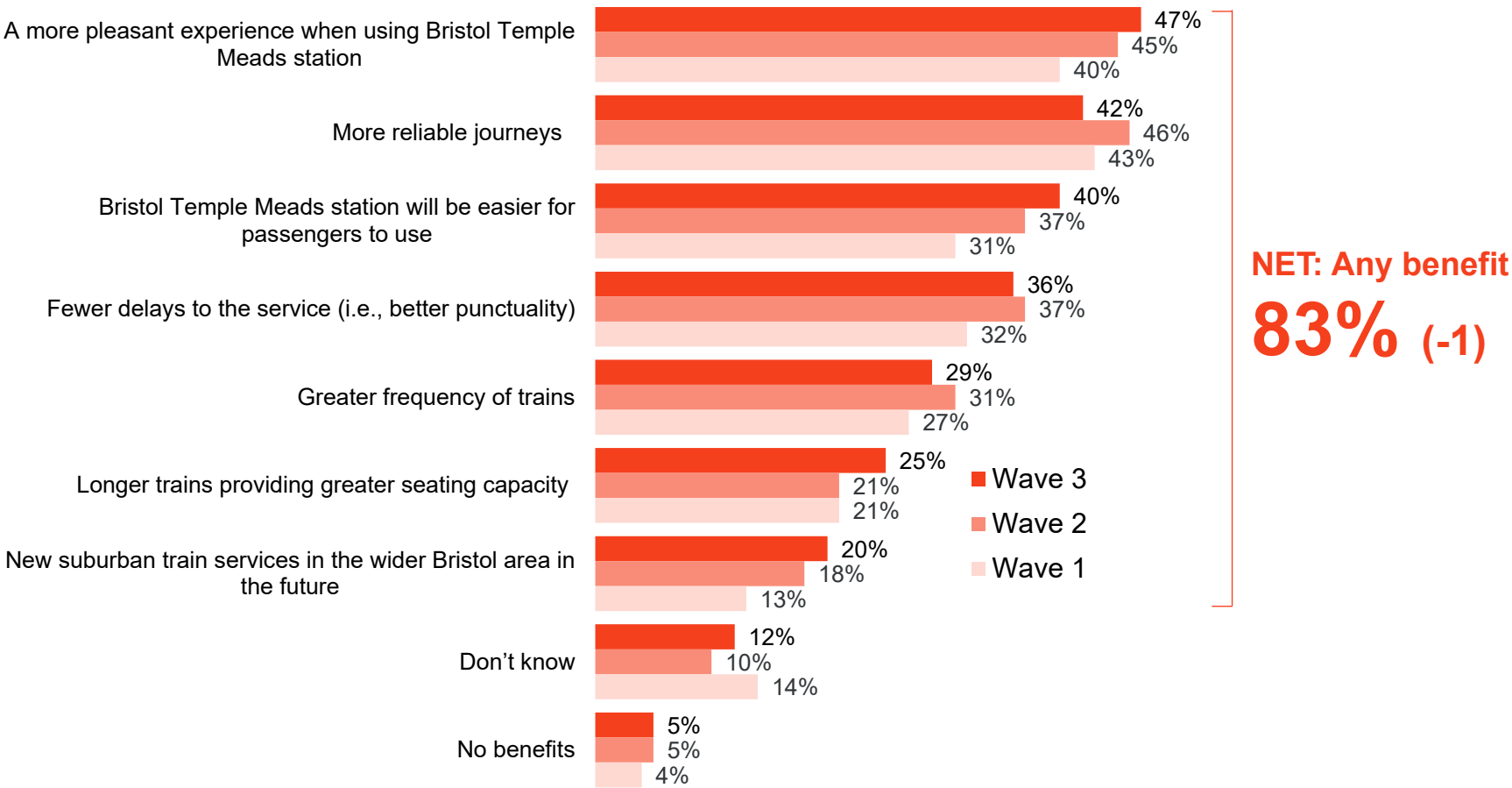
Some of those expecting to be significantly affected are unwilling to use bus replacements and will drive or stop using the impacted train routes

Details of effect on travel plans (spontaneous) – based on significant/limited effect

Significant effect		Limited effect	
<p>"I plan to go back to work and take the train on a regular basis. I do not believe I will be able to commute during this period.... I am likely to continue working from home a little longer"</p>	<p>"I am not willing to use buses; therefore, if the bus is the replacement, then I will not use the service. Also having to check for rescheduled times and route diversions. I will use my car instead"</p>	<p>"I would have liked to be able to use the train for a day out but given the alternatives I will probably not"</p>	<p>"I expect to be delayed due to the junction works but this is unlikely to deter us as we are only making leisure trips"</p>
<p>"I will revert to alternative options; online meetings or maybe drive up to Reading instead"</p>	<p>"Getting to Bristol either as my final destination or an interchange point will be disrupted. I will sometimes find alternative rail routes and sometimes drive instead"</p>	<p>"I am unsure on how much effect it will have but thinking that I can be flexible with my journeys, so there will be less impact. E.g. I can avoid the days when there is more disruption"</p>	<p>"I would want to know about this in advance and if I knew the likely delay times or alternatives then I may plan to drive to Bath"</p>
<p>"I expect my travel to be affected because the trains I board might be replaced with buses which I'm not so comfortable with now because of the coronavirus pandemic. I might stop the use of trains for a while"</p>	<p>"Longer journey times, but I will still travel for my delayed 2020 holiday"</p>	<p>"Currently not travelling to London office and unsure when this will recommence. The station works may be finished by my next journey"</p>	<p>"I am hoping to travel to see my parents using the train via Bristol Temple Meads, but I should be aware of this prior to going and will make plans accordingly"</p>

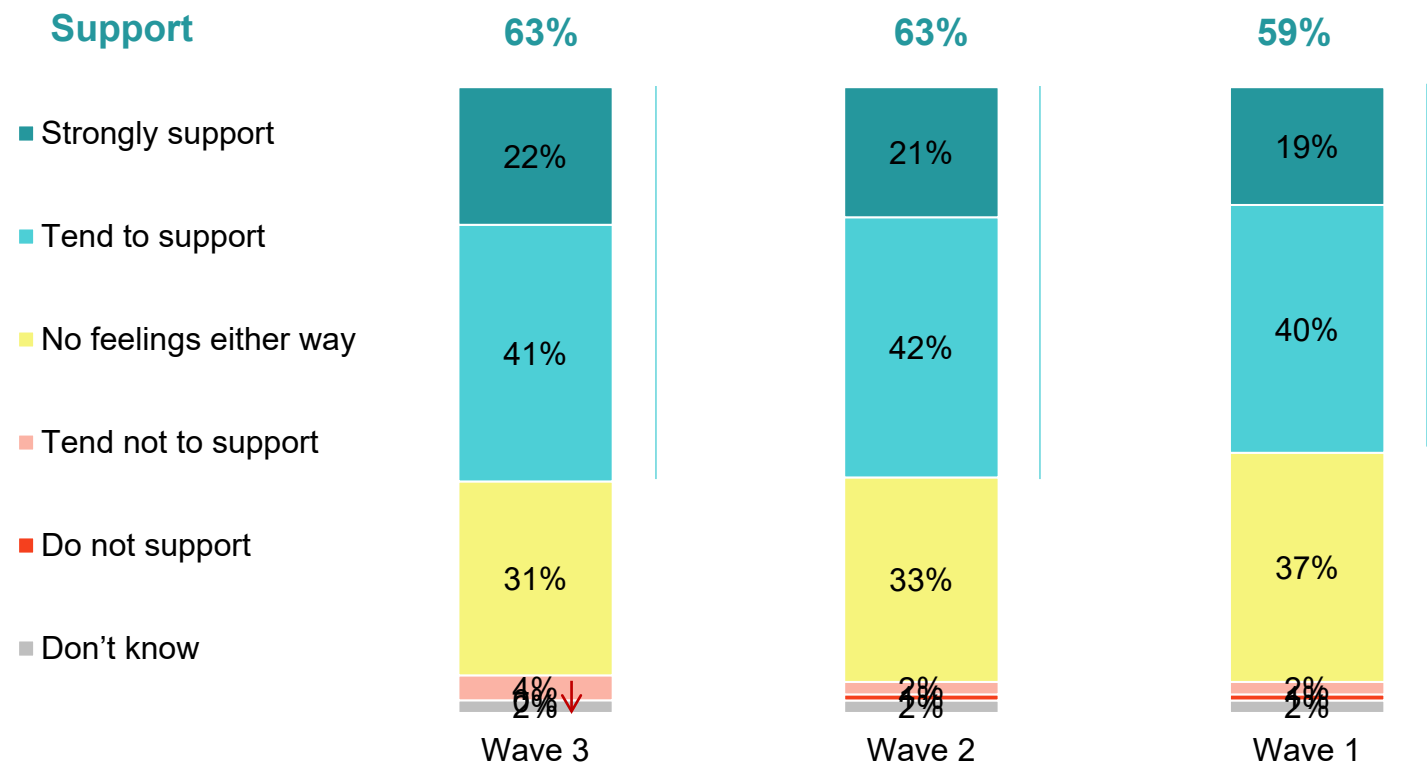
Expectations of benefits remain similar to Wave 2 with four in five recognising at least one benefit; most commonly a more pleasant experience at the station

Perceived benefits of the work – based on all respondents



Support for the Bristol works remains at two thirds of passengers; similar to London Waterloo and higher than other benchmark projects

Level of support for work – based on all respondents



Benchmarks*	W1	W2	W3
Derby	36%	36%	40%
London Waterloo	69%	69%	66%
Bath Spa	46%	54%	58%
King's Cross	56%	62%	n/a
Brighton	49%	41%	51%
WCML	60%	65%	n/a

Key insights

SECTION 5

Bristol regeneration: Summary

INTRODUCTION: Network Rail (NR) will be replacing the tracks and signalling at Bristol East Junction over the summer of 2021. There is also longer-term renovation work at Bristol Temple Meads Station in progress. This research was the last of three waves to monitor awareness and understanding of the works, messaging and information channels as well as expected effect of and support for the works. 420 passengers who had travelled via Bristol recently and are likely to travel via Bristol in the next six months were interviewed via a 15-minute online panel survey. 12 additional responses were collected through social media channels. The sample profile was comparable to Waves 1 and 2. The results include comparisons to six* previous research projects Transport Focus has undertaken to understand the impact of engineering works – although differences should be interpreted with caution.

AWARENESS: Spontaneous awareness of the works in Bristol shows signs of improvement with 29% aware; slightly but not significantly higher than for Wave 2 (+3%pts) and lower than previous projects elsewhere. Awareness continues to be highly related to recency of last journey and there has been a significant increase among those who travel via Bristol at least monthly (+12%pts). Prompted recall of specific communications is high with 34% of passengers saying they have seen at least one of the two communications shown – although there may be some misattribution.

UNDERSTANDING/MESSAGING: The level of knowledge among those aware of the works has declined (-12%pts since Wave 2; not statistically significant) but for the total sample, remains similar to previous waves (-1%pt since Wave 2). Messaging regarding the disruption shows signs of improvement. However, given that the works are imminent, knowledge of service alterations (diversions and replacement buses/coaches) remains low at 41% of those aware of the works (+15%pts) as does knowledge of the dates at 45% (+9%pts). More work is needed to raise awareness of further alterations to train services in September (currently only 13% of those aware of the works).

INFORMATION CHANNELS: In this wave, passengers aware of the works were most likely to find out through the press and TV news (30%) – a significant increase compared to Waves 1 (+18%pts) and 2 (+15%pts). Finding out when buying a ticket (5%) or researching a journey (11%) remains low, although these are both preferred ways to find out about disruption. Satisfaction with the information provided remains similar to the previous wave (38%; -1%pt since Wave 2) and continues to be highly related to awareness of the works. The minority who are dissatisfied are concerned about potential disruptions to their journeys.

OVERALL EFFECT AND SUPPORT: After an unexplained decrease in Wave 2, those saying that the works will have a limited effect on their travel plans has returned to the level seen in Wave 1 (50% vs 43% in W2 and 51% in W1). Recognition of the benefits of the Bristol works (83% vs 84% in W2 and 82% in W1) and support for the works (63% vs 63 in W2 and 59% in W1) remain at a high level.

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