TfL Whiteboard Posters

October 2015

Final Debrief
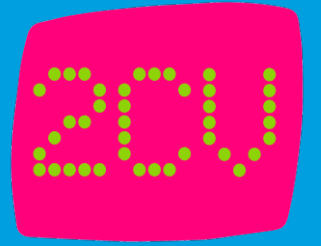
Transport for London

Contents
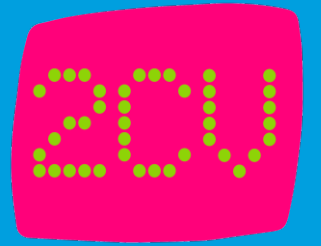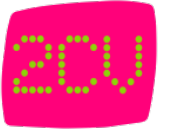
Background and Objectives

Background to the Research

London Underground prints a range of whiteboard posters to provide customers with localised and timely information in stations
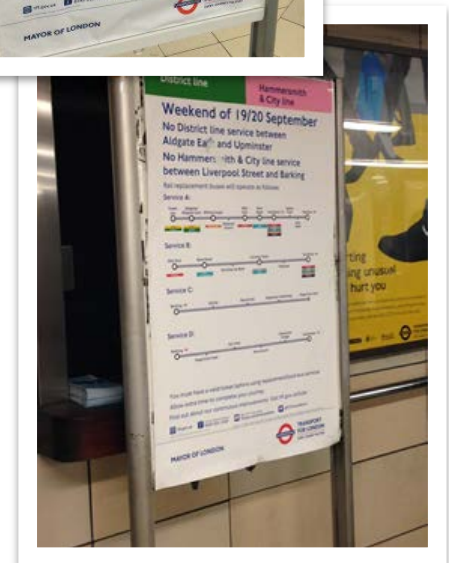
There can be numerous whiteboard posters on display across the network covering messages such as: weekend closures, local events and station maintenance

There is a sense that there may be too many whiteboard posters displaying a variety of critical and non-critical information, with no consistent adherence to style or content guidance
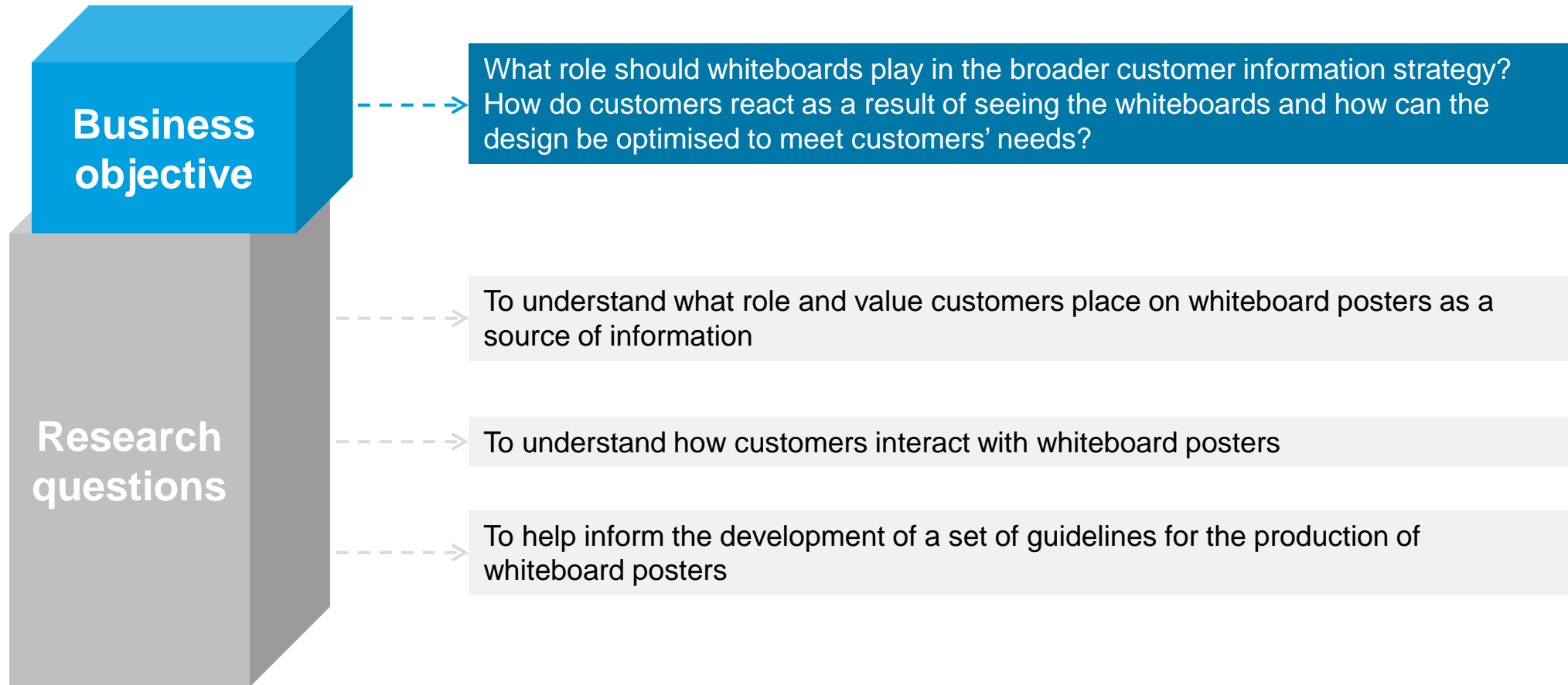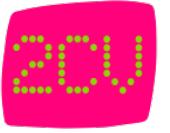
TfL wants to use customer insight to inform the development of a strategy for the use of posters in stations

TfL now wants to **understand customer needs and expectations** from these posters and how the design can be optimised to make it easy for customers to both:
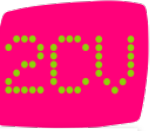
- Attend to the information they need

- Ignore the information they do not need

Objectives

Business objective

What role should whiteboards play in the broader customer information strategy? How do customers react as a result of seeing the whiteboards and how can the design be optimised to meet customers' needs?

Research questions

To understand what role and value customers place on whiteboard posters as a source of information

To understand how customers interact with whiteboard posters

To help inform the development of a set of guidelines for the production of whiteboard posters

The detailed research questions…..

Role of posters
- How are they used by customers and staff?
- Do customers think they are up to date?
- What is the role of posters vs other sources in the station (eg staff, other Customer Information)?
- What types of information are most suitable for this channel?
- How do different types of customers engage with the posters?
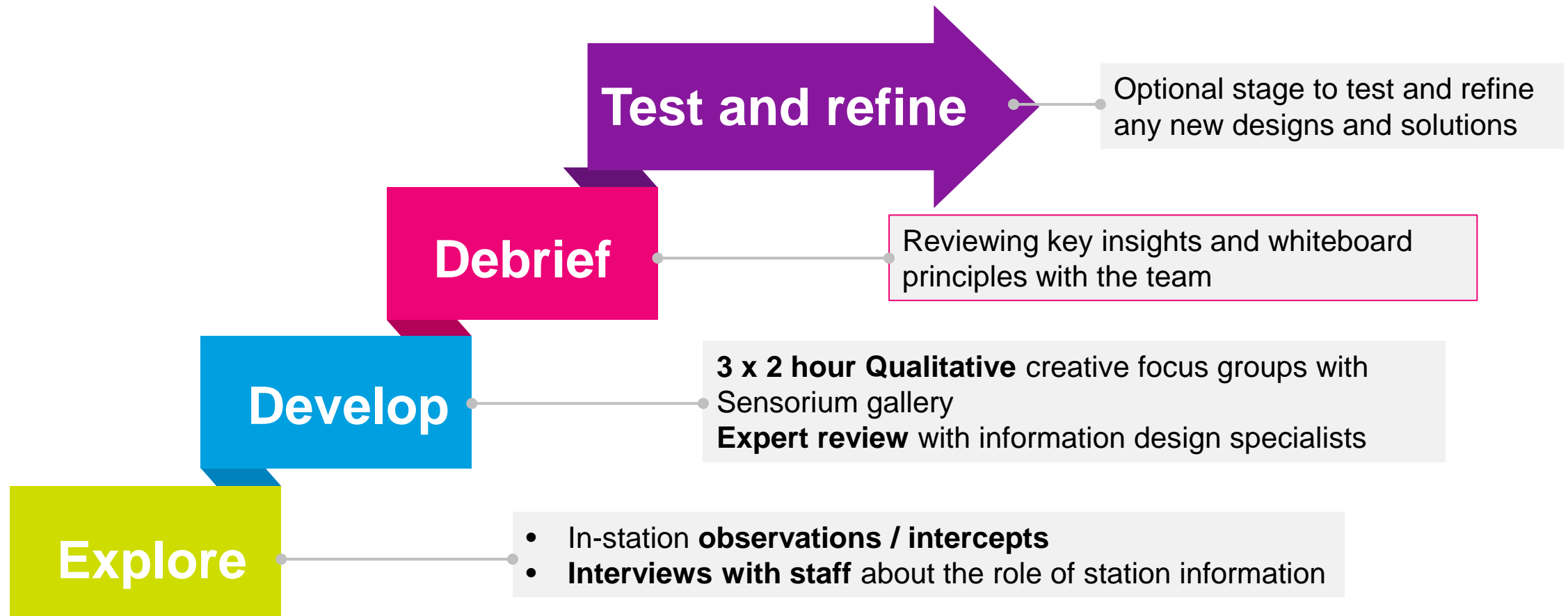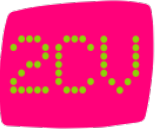- What impact does this information have on customers?

Recall / memorability
- Is the information recalled / acted upon?
- Is the number of types of poster overwhelming? Does it undermine effectiveness?

Information / design
- What is the hierarchy of **information** that the customers want to know in their journey?
(eg train not running)
- What are customers' perceptions of whiteboards? Noisy? Handwritten = urgent?
- How much **information** do customers actually need?
- How much **information** can we convey/how much can customers absorb?
- Does the use of images make the **information** more engaging and/or easier to take in?

Methodology

Test and refine

Optional stage to test and refine any new designs and solutions

Debrief

Reviewing key insights and whiteboard principles with the team

Develop

3 x 2 hour Qualitative creative focus groups with Sensorium gallery
Expert review with information design specialists

Explore

- In-station **observations / intercepts**
- **Interviews with staff** about the role of station information

Whiteboard posters explored as part of the creative groups

Key headlines

Both staff and customers agree that whiteboard posters have the potential to be an important source of customer information in stations

However, currently they lack impact and effectiveness because:
- The information can lack relevance (what, when and where). Too many are left up for too long.
- There is often too much information being conveyed
- There are too many whiteboard posters in stations and often not in an optimal position for customers to act on the information
- There is an inconsistent use and design of whiteboard posters from one to another

TfL would benefit from a new whiteboard poster strategy that sets out the core principles for the channel in order to have **greater impact**, become a **trusted source of information** and **achieve greater consistency** from one whiteboard poster to another

This strategy must set out some clear principles on:
- **What to communicate**: Customers want whiteboard posters to **alert** them to imminent changes that will have an immediate impact on their journeys today, tomorrow or at the weekend. Staff would like a stronger rationale for why posters have been sent to their station and which messages to prioritise week by week
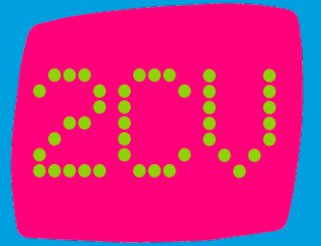- **How to communicate:** Fewer words, more colour and graphics used to make them more eye-catching and distinctive. Customers would like to see more of TfL's design heritage reflected
- **Where to position:** Staff would benefit from more guidance on where the whiteboard posters should be positioned and the relevant time period for displaying

Exploring the role of whiteboard posters

Station environment means it is difficult for customers to process information quickly
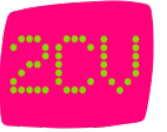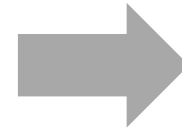
STATION FACTORS → CUSTOMER MINDSET

Noise and Stimulation

Overcrowding

Rushing

cognitive resources are scarce, limited, quickly and easily-depleted
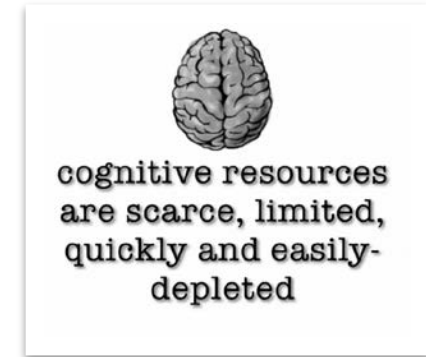
Culture of the Tube/London – survival of the fittest/ not a place to take it slowly

Goal directed behaviour – desire to keep moving and focus on getting there rather than the journey

'When I'm travelling through London I just have my eye on the final destination and ignore everything else!'

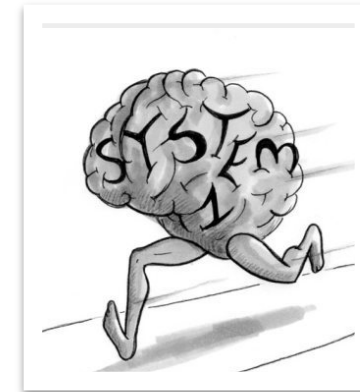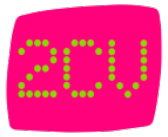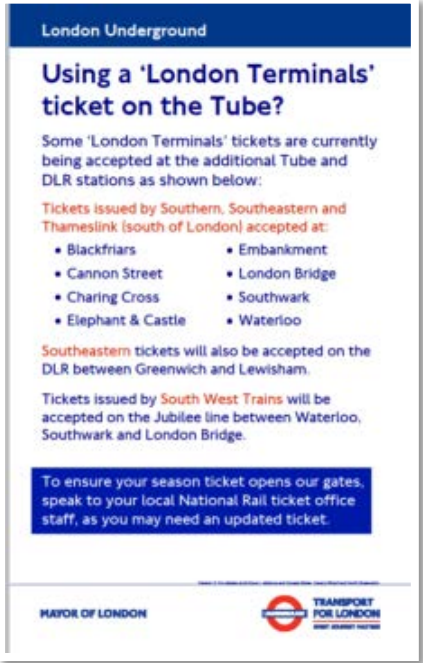# Although whiteboard posters have an important role to play, customers and staff feel that it is vey easy to ignore them

Messaging lacks relevance

'I have no idea what this is telling me to do'
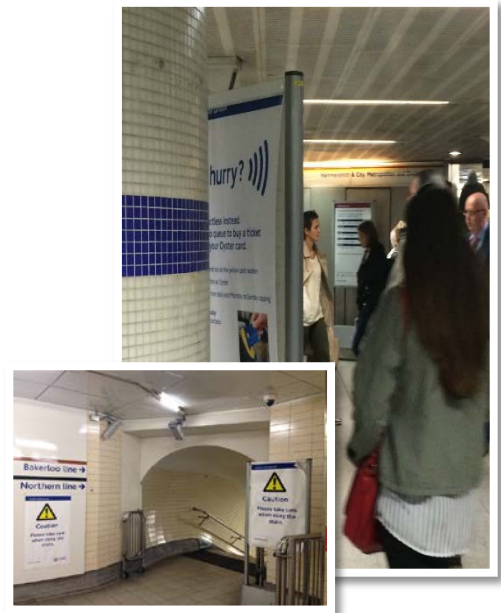
Not Imminent

'I recently saw a poster warning of wet weather. It had been up there all week and it hadn't rained in days!'

Too much information

'I don't have time to stand and read all this'

Too many posters

'I might take a quick glance, but usually I walk straight past'

It is all too easy to ask staff directly for help

Staff feel that whiteboard posters are a handy aid for them to help them do their job

- Staff will often point to whiteboard posters to support them when customers have queries
- Whiteboard posters diffuse conflict when customers accuse staff of not being informed

However, they all feel that customers are largely reliant on staff for information

'Customers are asking me about something that is quite clearly spelled out right behind them'

'Having posters up makes our job slightly easier. I can stand by the engineering works poster and use that as an aid to explain what's going on to customers'

'It's important for us to be able to let customers know what is going on at that exact station at a specific time - we still get asked lots of questions but we can point at the poster and say 'Look, it's there'

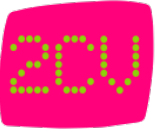'If you want someone to ignore information, put it on a poster!'

Though whiteboards do have a role, staff and customers agree they need to change in order to have more impact

13
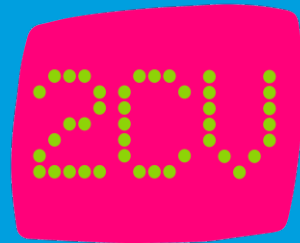
What to say

Customers feel that whiteboard posters should be used to primarily alert them to immediate changes in the service

	PLANNED ENGINEERING WORK (LONG-TERM)	STATUS UPDATE / SERVICE CHANGES (SHORT-TERM)	APOLOGIES	SAFETY and SECURITY	EVENT DIRECTIONS	HANDWRITTEN NOTICES
MOST RELEVANT TO CUSTOMERS		Delays/disruptions/ closures that are happening or about to happen. Customers want line information to be prioritised over station information	Better suited to channels that can be more personal eg emails/texts	Can often feel like 'common sense' and easily ignored. Limited impact in changing behaviour	Local directions to show which exit to take for a special sports event is helpful	Customers like 'thought of the day' as it demonstrates human side to TfL. Does not feel appropriate to hand write important information to service changes
MOST RELEVANT TO STAFF	Engineering work	Delays and suspensions **Their station information is priority**	Nice way to demonstrate customer care			Mixed response – can look unprofessional (if badly written)

'I just want to know what is going on with my specific line. How is this going to affect my journey?'

'Posters alerting customers to changes to the station are important. They always come to us to complain about it and the poster helps point out that we did inform them'

'I like it when there are directions to sports or music events. It shows TfL cares and makes the station easier to navigate'

2CV

Short-term status updates and local directions (to events) are the most useful and relevant information to communicate
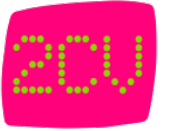
- Within the station context, customers are **seeking out information** they feel will **directly impact their journey** and may require them to change their journey plans

STATUS UPDATE / SERVICE CHANGES (SHORT-TERM)

EVENT DIRECTIONS

'Engineering works are important to know about – though I would never have time to read this whole poster, it's good to know something is happening and then I look up the details online'

'Info about strikes is really important! It's good to have that initial information on a poster but I suppose you can find it elsewhere'

'It's obviously important to know if a line you use frequently is going to close'

'I love it when they give directions to special events- it really helps to keep everyone moving. This one is particularly nice - It's easy to understand'

Information that does not alert customers of service changes is felt to be less relevant and is generally ignored

Non-urgent information is not felt to be appropriate for whiteboard posters

- The amount of information is distracting and overwhelming

- They can seek it out 'elsewhere' or it feels 'common sense'

- They feel it would be better communicated via another channel (eg text or e-mail)

FARES AND TICKETING

'I don't even know where to begin! I'd never read it!'

STATION SPECIFIC INFORMATION

'This is good to know but I'd rather have an e-mail or text about it or something'

SAFETY AND SECURITY

'I don't need to be told this- I know that!'

APOLOGY
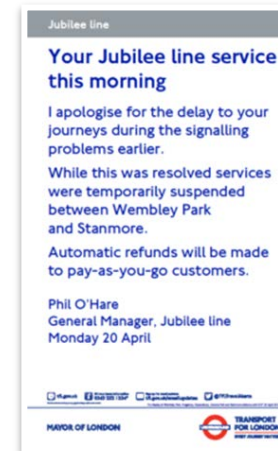
'This is a little pointless. It's a nice sentiment but don't put it on a whiteboard. It feels very self-congratulatory'

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It can be difficult for staff to know which messages to prioritise and where best to place them in the station

Message Priorisation

Staff use a 'common sense' approach built on years of experience and knowledge of the local customer base

Many posters are not relevant to station (and can go straight into the bin)

There is often no rationale from TfL as to why a poster has been sent
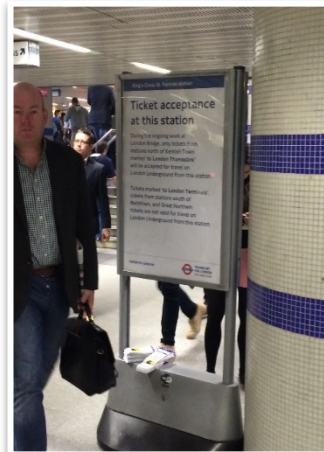
Too many in the station

Placement

Often not in optimal positioning for customers to act on

Staff can resort to taping posters on the wall due to lack of space

Often the same posters are next to each other

Upkeep

Feel old-fashioned (especially compared to ESUBs) and dated (if kept up too long)

Posters are often kept up because the boards look ugly and unprofessional when empty

Difficult for staff to insert poster into frame (hence why ripped and taped up)

Staff need more guidance on which messages to priorities and where they should be positioned in stations
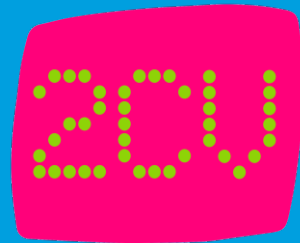
How to say it

These whiteboard posters are felt to be too wordy and try to convey too much information

'I don't blame customers for not stopping to read the poster- some of them are hard to understand! That's why they come to us for help'

'The use of red here seems a bit random. I have no idea what this is trying to tell me'

'Why wouldn't they use the Victoria line colour?'

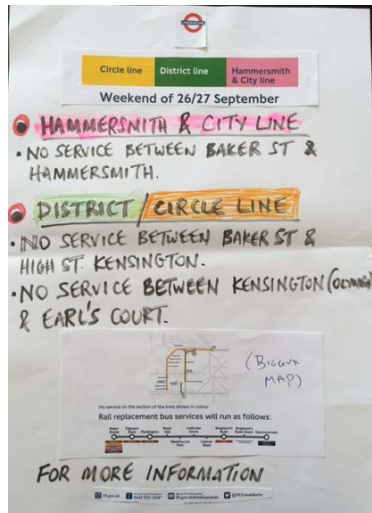'I don't really care about how much concrete has been poured!?'

'There is just no way I would ever stop and look at this. I don't understand what it's telling me and if I paused for more than a few seconds I would get trampled!'

Visually customers would like to see less words, more colour and graphics
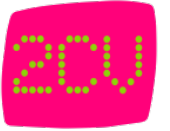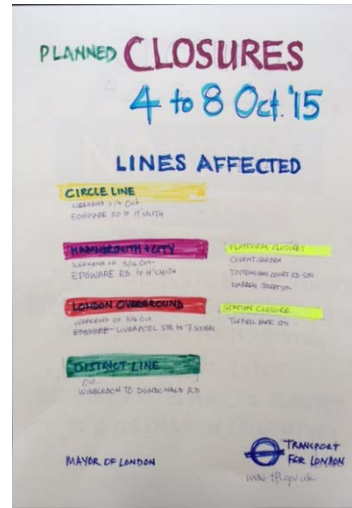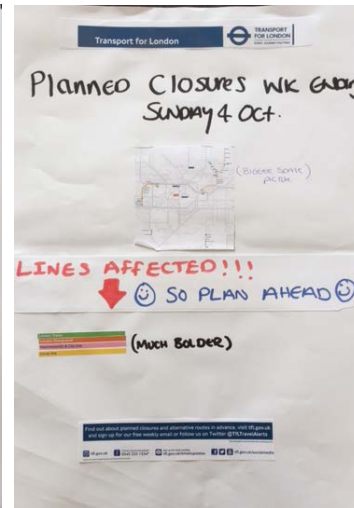
ENGINEERING WORKS

'We decided to use lots of colour to make it absolutely clear which lines we were talking about. No faff- just the facts!'
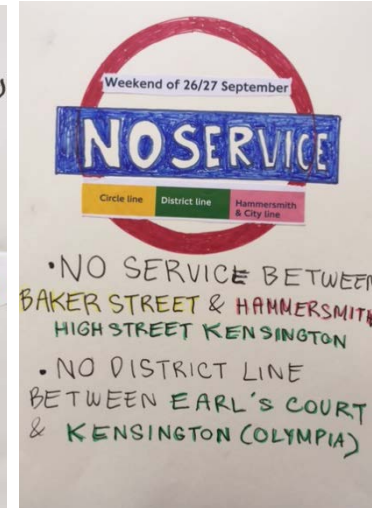
PLANNED CLOSURES

'We wanted to put the most important info first- closures and dates! Then we made the line information clear by using colour'
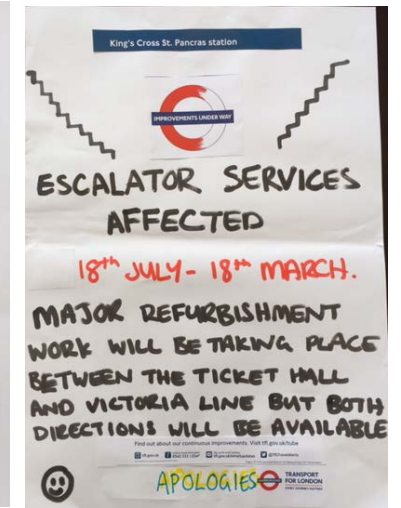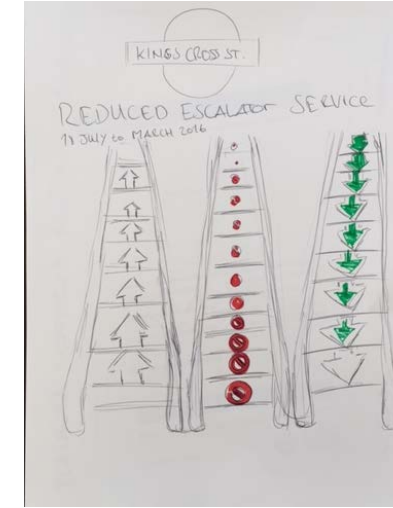
'We cut out a lot of unnecessary info and just stuck to what's important- lines affected and dates'
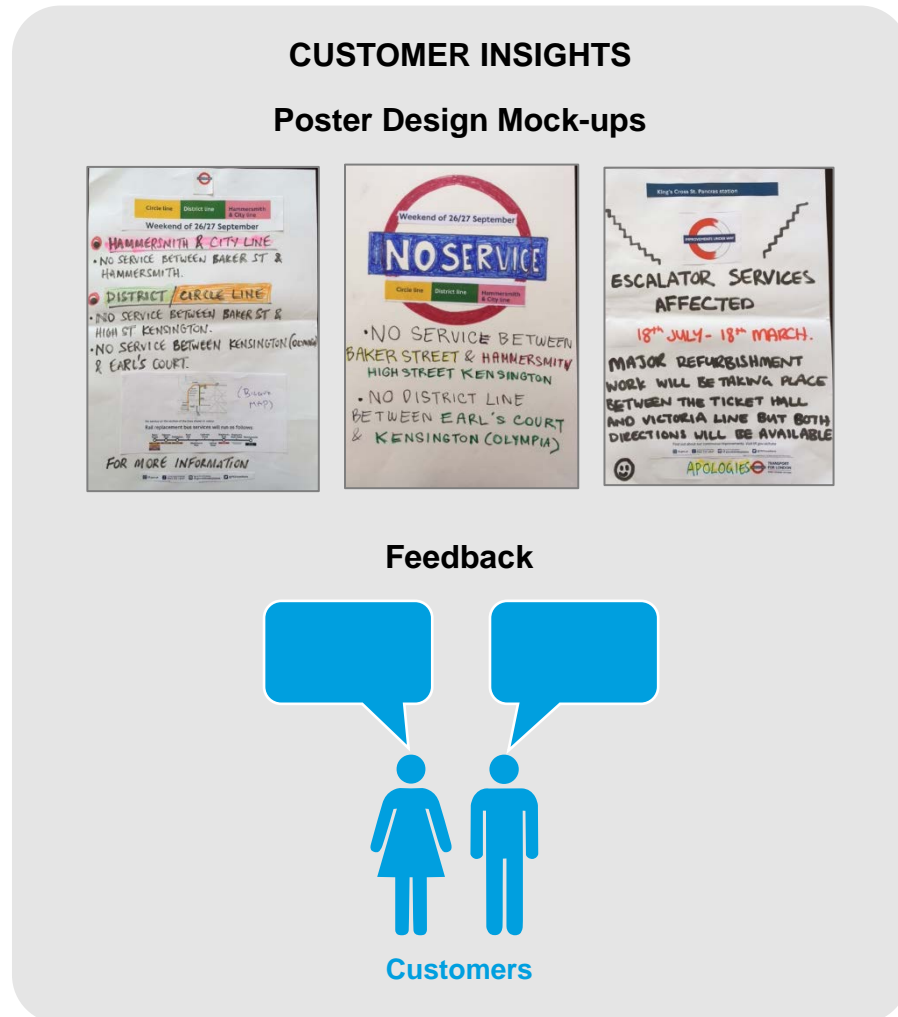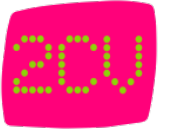
ESCALATOR WORKS

'We thought it was really important to use pictures! People don't have time to read so graphics are key!'

'We tried to highlight the dates by using a different colour'

Design experts identified key principles for effective information design (how to say it)

CUSTOMER INSIGHTS

Poster Design Mock-ups

Feedback

Customers

STRUCTURE

1. Clear definition of **information types**

2. Unambiguous **message**

HIERARCHIES

3. Well-defined **hierarchies**
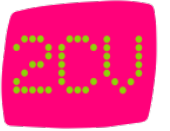
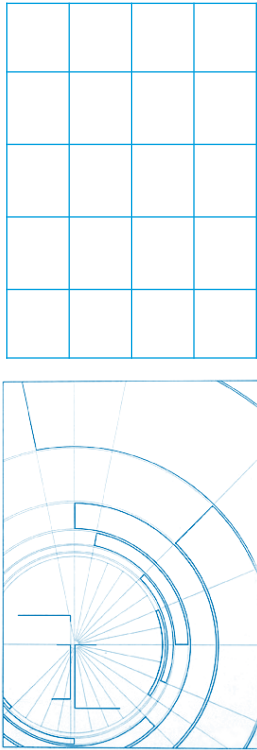4. Logical **visual structure** of the information

VISUALS
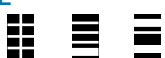
5. Appropriate use of **visuals**

6. Purposeful use of **visual variables**

PLACEMENT

7. Optimisation of **performance**

To achieve the greatest impact, information design principles should be considered holistically rather than individually

STRUCTURE		HIERARCHIES		VISUALS		PLACEMENT

1 Clear definition of **information types**

Identify components to be communicated

- **What** — Problem
- **When** — Date/Timeframe
- **Where** — Line/Station/Network
- **Who** — Person delivering message
- **Why** — Explanation
- **How** — What to do

2 Unambiguous **message**

Use clear and direct language

- **Concise**
- **Few words**
- **Plain English**

3 Well-defined **hierarchies**

Rank by importance or priority

- **Primary information** — eg problems, events, date, location
- **Secondary information** — eg descriptions, explanations
- **Technical information** — eg links, logos

4 Logical **visual structure** of the information

Arrange in a systematic way

5 Appropriate use of **visuals**

Support message with most effective image type

- REALISTIC
- DOG
- ABSTRACT

6 Purposeful use of **visual variables**

Make content-driven decisions about graphic elements

- COLOUR
- POSITION
- SIZE
- SHAPE
- ORIENTATION
- TEXTURE
- VALUE
- TYPOGRAPHY — Aaa Aaa

7 Optimisation of **performance**

Ensure impact of information display in context and use

- **Production** — eg specifications, output
- **Display** — eg placement, context, duration, updates/ maintenance

Some whiteboard posters can demonstrate thoughtful application of several information design principles
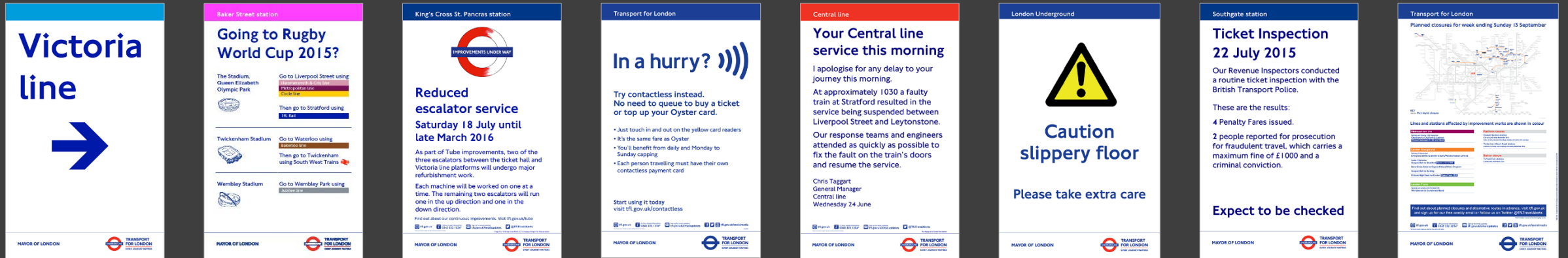
1 Clear definition of **information types**

- **Uniform brand elements:** The band across the bottom of every poster with 'MAYOR OF LONDON' and the Transport for London logo ties the whiteboard poster family together and reinforces the institutional presence

3 Well-defined **hierarchies**

- **General sense of hierarchy with visuals, headers and body text:** Most visual elements are bigger and towards the top of the poster.
- The slightly larger type size helps distinguish header from sub-head and body text.

4 Logical **visual structure** of the information

- **Uniform layout:** Text only or visual only posters have a three-section structure. Posters combining text and visuals have a clear structure.

6 Purposeful use of **visual variables**

- **Well-established visual system:** The overall 'whiteboard poster' look is recognisable across all examples.
- **Consistent typeface use:** The New Johnston typeface is used exclusively, which ties the posters to the Transport for London visual system.
- **Deliberate colour use:** Nearly all text, symbols, and graphic elements on the posters are Transport for London blue. Underground lines are presented in their respective colours when appropriate.

However, while several areas are working well, further improvement is needed to enhance the effectiveness of all whiteboard posters
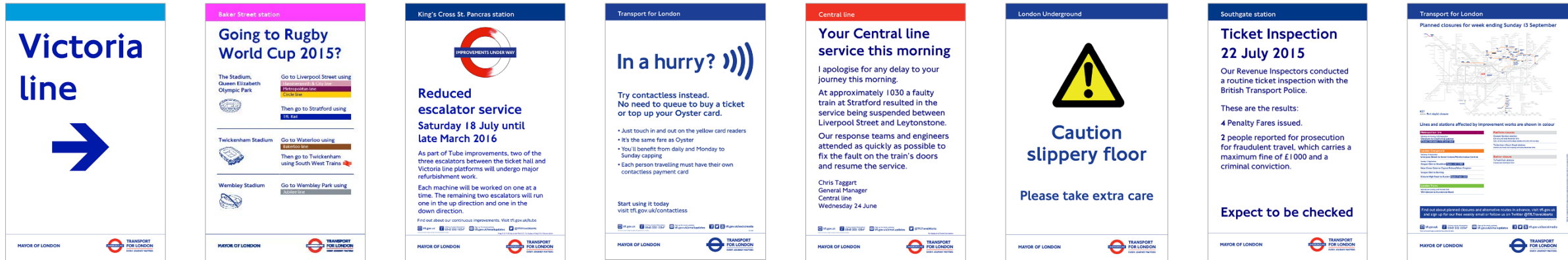
WORKING WELL 👍

WORKING LESS WELL 👎

- Simple, minimal visual language

- Consistent typeface use

- Uniform brand elements appear on every poster

- Messages that communicate relevant line information (for journeys happening today or tomorrow)

- Messages that have a punchy relevant headline

- Little and inconsistent use of graphics

- Inconsistent design within same messaging areas

- Too many types of information and too much text makes it easy for customers to switch off

- Ineffective distinction between levels of information

- Unclear reading flow and visual order

- Limited use of visual variables (size, colour, layout, etc.)

Recommendations

Recommendations for TfL's Whiteboard Poster Strategy (what to say)

GENERAL

- Establish a uniform **TfL communication strategy**
- Always consider the **context** eg station environment
- Apply consistent **design decisions** within whiteboard poster types (eg service status updates)
- Bring back TfL's unique **design heritage**
- The busier the station, the higher the information overload. Ensure that the messages are readable in a **single glance** and contain as few elements as possible

INFORMATION TYPES

- Decide what types of information should be **prioritised** for whiteboard posters
- Clearly distinguish different types of information
- Have a cleaner **call to action** so customers know what they need to do

MESSAGE

- **Limit** the amount of text on the poster to allow for more white space, which helps draw attention
- Write clear, concise headings and text focused on **essential information**
- Provide a clearer rationale to staff about why posters have been sent

Recommendations for TfL's Whiteboard Poster (how to say it)

PLACEMENT

- Provide **guidance to staff** on the optimal positioning of message (where it can be seen by all and relevant to action)

STRUCTURE

- Make sure that the amount of space between graphic elements in information reflects their importance
- Use layout **consistently**

HIERARCHIES

- **Determine level of importance** before coding information
- **Boldly distinguish** more relevant information from less relevant information (eg placement near top of poster, larger size, heavier font weight, different colour or background)

VISUALS

- Use **graphics and icons** to reduce reading time and effectively increase the reader's information processing capacity (eg arrows, bullets, lines, symbols to highlight relevant information)
- Use graphics and icons to increase conspicuity only if they are **familiar to customers** and directly reinforce the content
- Use visual elements that are **interesting enough to get attention**
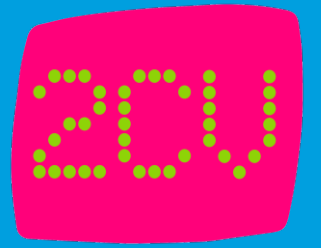
Appendix

Information design specialists

- **Sheila Pontis** is an information design consultant, researcher and educator with over 14 years of experience, specialising in un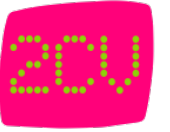derstanding how people make sense of, seek, use and interact with information. Sheila will bring to this project vast experience in information design, and expert knowledge on understanding ways of improving the visualisation of information. Her work bridges information design, information behaviours, and sense-making and is informed by her prior work as a researcher (UCL, Elsevier) as well as her PhD thesis in which she developed guidelines to assist designers through decision-making, conceptual design, analysis, and information organisation.

- **Michael Babwahsingh** is an information designer with over 15 years of experience. He has worked on solving information design challenges ranging from corporate strategy development and change management to learning experiences and communication system design. Michael has worked with for-profit and non-profit clients alike, including Pfizer, Wells Fargo, Liquidnet, Markets for Good, Sermo, and the American Human Development Project.
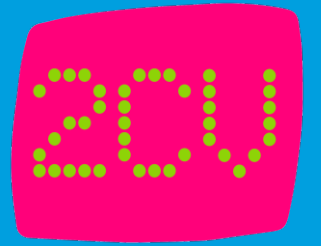
Thank you

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Chloe.DeSchryver@2cv.com

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