TfL Whiteboard Posters

October 2015
Final Debrief
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

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?

Business objective

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

Research questions

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?
Reviewing key insights and whiteboard principles with the team

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

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

Optional stage to test and refine any new designs and solutions

Methodology
Whiteboard posters explored as part of the creative groups

**London Underground**

**Victoria line service restored Walthamstow Central to Seven Sisters**

During the three week closure on the Victoria line we made the following improvements:

- removed 1,000 tonnes of track ballast
- replaced 334 metres of track
- poured 900 tonnes of concrete
- recycled 90% of scrap and spoil

These improvements will allow us to run up to 36 trains per hour on this line from late 2016.

Thank you for your patience during these works.

**Jubilee line**

**Your Jubilee line service this morning**

Apologies for the delay to your journeys during the signalling problems earlier.

While this was resolved services were temporarily suspended between Wembley Park and Stanmore.

Automatic refunds will be made to pay-as-you-go customers.

Phil O’Hare
General Manager, Jubilee line
Monday 20 April

**Transport for London**

**Getting around central London**

- **Paddington station**
  - Weekend of 26/27 September
  - For Egerton Road – it’s a short walk along Preece Street. Alternatively, take bus 27 from stop G on Preece Street.
  - For Baker Street – use the Bakerloo line
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- **District line**
  - Weekend of 19/20 September
  - No District line service between Aldgate East and Upton Park
  - No District line service between Liverpool Street and Back Lane

- **Hamnersmith & City line**
  - Weekend of 26/27 September
  - For Egerton Road – it’s a short walk along Preece Street. Alternatively, take bus 27 from stop G on Preece Street.
  - For Baker Street – use the Bakerloo line
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**In a hurry?**

Use contactless instead. No need to queue to buy a ticket or top up your Oyster card.

- Get to the station or use the app
- Top up your Oyster
- You’ll have a fare zone ticket

Start using it today
Search TN, connections

**Transport for London**

**Using a ‘London Terminals’ ticket on the Tube?**

Some ‘London Terminals’ tickets are currently being accepted at the additional Tube and DLR stations as shown below:

- Blackfriars
- Euston
- Camden Town
- Charing Cross
- Bakerloo
- Jubilee

Southeastern tickets will also be accepted on the DLR between Greenwich and Lewisham.

Tickets issued by South West Trains will be accepted on the Jubilee line between Waterloo, Southwark and London Bridge.

Tea's your season ticket opener our gates, speak to your local staff or ticket office staff as you may need an updated ticket.

**Transport for London**

**Drinking alcohol and smoking are not allowed on our services**

Drinking alcohol, carrying open containers of alcohol, and smoking, including e-cigarettes, are not allowed on any TFL services.

**London Underground**

**Busier than usual during Rugby World Cup 2015**

This station will be busier than usual at the following times:

- Friday 18 September
- Saturday 19 September

- The Stadium, Queen Elizabeth Olympic Park
- Go on to Stratford using Olympic Park

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- Go on to Stratford using Olympic Park

- Twickenham Station
- Go on Walthamstow using Olympic Park

- Walthamstow Station
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**London Underground**

**Hot weather alert**

- Please carry water with you at all times
- Don’t get on a train if you feel unwell
- If you feel unwell while on a train, please get off at the next stop and seek help from a member of staff

Use contactless instead. No need to queue to buy a ticket or top up your Oyster card.

- Get to the station or use the app
- Top up your Oyster
- You’ll have a fare zone ticket

Start using it today
Search TN, connections
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**
- Noise and Stimulation
- Overcrowding
- Rushing

**CUSTOMER MINDSET**
- 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 very 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
What to say
Customers feel that whiteboard posters should be used to primarily alert them to immediate changes in the service.

<table>
<thead>
<tr>
<th>MOST RELEVANT TO CUSTOMERS</th>
<th>MOST RELEVANT TO STAFF</th>
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<tr>
<td>Engineering work</td>
<td>Engineering work</td>
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**PLANNED ENGINEERING WORK (LONG-TERM)**
- Delays/disruptions/ closures that are happening or about to happen
- Customers want line information to be prioritised over station information

**STATUS UPDATE / SERVICE CHANGES (SHORT-TERM)**
- Delays and suspensions
- Their station information is priority

**APOLOGIES**
- 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

**SAFETY and SECURITY**
- Nice way to demonstrate customer care
- Local directions to show which exit to take for a special sports event is helpful
- Limited impact in changing behaviour

**EVENT DIRECTIONS**
- 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

**HANDWRITTEN NOTICES**
- Mixed response – can look unprofessional (if badly written)

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

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

‘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’
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

‘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)

**FORES 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"
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 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

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.

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<thead>
<tr>
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<tr>
<td>Clear definition of information types</td>
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<td>Appropriate use of visuals</td>
<td>Purposeful use of visual variables</td>
</tr>
<tr>
<td>Identify components to be communicated</td>
<td>Rank by importance or priority</td>
<td>Support message with most effective image type</td>
<td>Make content-driven decisions about graphic elements</td>
</tr>
<tr>
<td>Unambiguous message</td>
<td>Logical visual structure of the information</td>
<td></td>
<td>Optimisation of performance</td>
</tr>
<tr>
<td>Use clear and direct language</td>
<td>Arrange in a systematic way</td>
<td></td>
<td>Ensure impact of information display in context and use</td>
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**What** Problem

**When** Date/Timeframe

**Where** Line/Station/Network

**Who** Person delivering message

**Why** Explanation

**How** What to do

**Primary information**
- eg problems, events, date, location

**Secondary information**
- eg descriptions, explanations

**Technical information**
- eg links, logos

**REALISTIC**

**COLOUR**

**POSITION**

**SIZE**

**SHAPE**

**ORIENTATION**

**TEXTURE**

**VALUE**

**TYPOGRAPHY**

**ABSTRACT**

**A a a**

**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.

2. **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.

3. **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.

4. **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**

- 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

**WORKING LESS WELL**

- 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 (e.g., 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 (e.g., 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 understanding 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

Kate.owen@2cv.com
Chloe.DeSchryver@2cv.com

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