### **Transport for London**

Off-peak usage of London Overground

08080

February 2009

**MAYOR OF LONDON** 

**Transport for London** 

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Research conducted by 2CV

## **Agenda**

#### Introduction to the research

#### Lifestyles of potential off-peak users and their relationship with London

- Understanding the lifestages of potential off-peak users and leisure interests
- Exploring local pride in London

#### Relationship with transport

- 'Turn up & go' culture
- Understanding different journey types
- Exploring the difference between the peak and off-peak mindset
- Off peak modal choice (both powered and sustainable)
- The ideal off-peak journey

#### Perceptions of London Overground

- Motivators for using London Overground at peak
- Understanding the barriers to London Overground usage
- Awareness barriers
- The perceived benefits of London Overground over other modes
- Understanding the perceptual barriers to the London Overground

#### Conclusions & recommendations

## **Background**

- As the future of the London Overground network promises to be dynamic with a scheme of investment planned to rejuvenate the network over the next 3 years, the present challenge of overcoming intrinsic barriers to use in the short term is no less relevant to the future of the network
- In May 2009 a new fleet of trains are being introduced to service, which will
  offer significant improvements on the current trains. This development, along
  with other initiatives and communications, is expected to deliver an increase in
  revenue
- In addition to new rolling stock all stations have been staffed from day 1 and all stations have been deep cleaned. This process is set to continue, with further refurbishment of stations including new fixtures and fittings being carried out throughout 2009 and 2010
- There are further plans to conduct re-modelling work at some stations improving accessibility but funding for this has yet to be approved
- Overall, in the coming years the travel experience of using the London Overground network looks set to change considerably with a lot of lines getting increased frequency of service between now and 2011.

## Overall research objectives

#### The overarching objective of the project is:

- To explore motivators and barriers to using London Overground, particularly during the off-peak period as well as potential opportunities for the network
- The research will feed into the ongoing strategic developments for London Overground and is required to take both a short and long term perspective on the issues and developments for the network
- This research is to feed into planned campaigns on off-peak journey stimulation and find out what the barriers are to those living close to our stations that currently don't use it for leisure reasons and during off-peak hours
  - Continue to raise awareness of London Overground
  - To increase revenue by increasing passenger numbers
  - Communicate the improvements taking place and planned for the future

## Detailed research objectives

#### This research is designed to:

- Understand the transport choices made by people living within convenient access to the London Overground network
  - How the modes of transport compare including how journeys are planned
- Explore awareness of the services offered by London Overground
  - Stations and locations accessible, frequency of service, cost of service
- Fully explore the motivators and barriers to using London Overground off-peak
  - To what degree does safety and security play a part? How is this manifested?
- Understand the basis from which barriers are derived
  - Perception vs. experience vs. rumour vs. media
- Understand how peak-time London Overground users feel about the service to understand where motivators can be leveraged to encourage off-peak usage
- Offer guidance for future communications to encourage greater off-peak usage

## Methodology



#### **Group discussions**

- All groups 1 ½ hours long
- Mix of peak time London Overground and off-peak other modes (non London Overground)
- 50:50 male female
- 30% 50% travel card holders
- 30% BAME



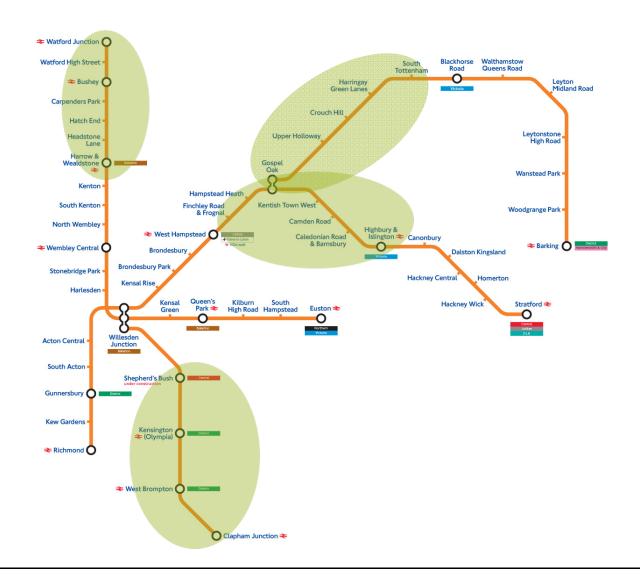
#### Post-task

- 4 respondents from each session selected to take London Overground journey
- Follow up telephone interview

### A note on the stimulus

- In order to guide the discussions around London Overground and to understand how any could potentially be overcome we used a range of stimulus, including
  - London Overground roundel
  - Network map
  - Places of interest by London Overground line
  - Off-peak frequency (2009 and 2011)
  - Images of new rolling stock
  - Images of existing rolling stock
  - Renderings of Crystal Palace station post re-build
  - Photographs of stations post deep clean
  - Increased security and safety measures
  - Key milestones
  - Existing London Overground communications
- This stimulus was used in order to generate discussion rather than to be assessed per se

## Where was our sample from?



# Lifestyles of potential off-peak users and their relationship with London

 Understanding the market in order to inform communications to encourage greater off peak usage

## A range of lifestages

- This research focused on 3 distinct lifestages that could be encouraged use the London Overground (LO)
- There are distinct needs that come into play for each group...

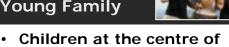


#### **Pre-family**

- · Friends as family
- Social life is your own to do what you want with
- Enjoy doing things as couples
- · Culturally aware and intrigued, want to explore → cultural knowledge as a badge

#### Young Family

decisions



- Young children with lots of energy want to stimulate and educate
- Want to facilitate children's socialisation and play
- Finding shared activities (with the whole family and other families
- But they aren't always in parent role, also enjoy their own time and still want to feel young

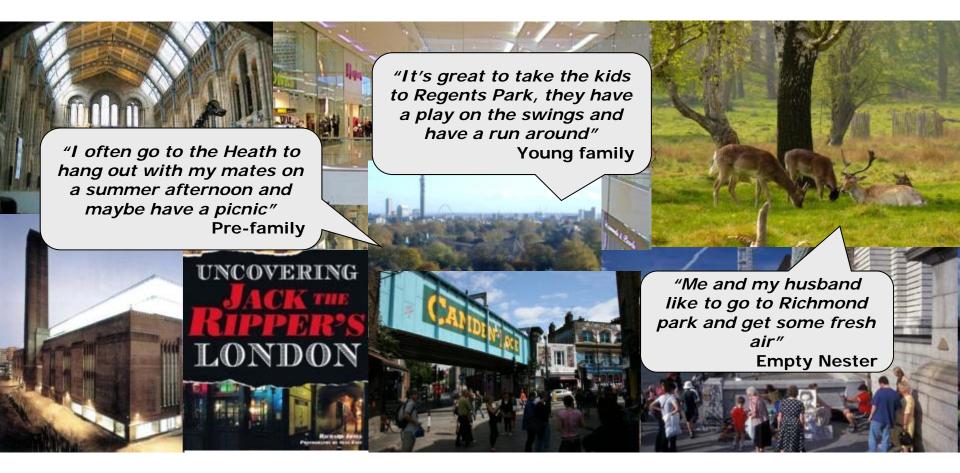
#### **Empty Nesters**



- Kids have left home
- Enjoying their own leisure/social time
- More disposable income able to take advantage of all of the activities London can offer
- · Seeking variety and stimulation
- · Re-connecting with grown up children/families

On the surface of it there are many differences in drivers but their behaviours are quite similar...

## All the lifestages are doing similar things...



...but, what they get from each of the activities and who they do them with varies

## Broadly activities can be categorised into 4 areas



#### **Green Spaces**

- Regent's Park, Hampstead Heath, Richmond Park
- All enjoy visiting these places getting away from 'city London'



#### **Nights Out**

- West End Theatres, socialising, eating out, Camden, Shoreditch, Upper Street
- All like to go out, although admittedly parents can't do this as much as they'd like

#### Cultural/historical



- V&A, Tate Modern, Soutbank, National Gallery, Jack the Ripper tours, city walks
- Often overlaps with other activities London is historical and cultural



#### **Leisure Shopping**

- Portobello Road, Brick Lane, Borough Market, Oxford St, Westfield
- Shopping can take various guises from functional high street to less directional/pottering behaviours

All lifestages are engaging with each of these activities and can all be targeted

## Maybe it's because I'm a Londoner...



- High level of pride about the city, proud to be a 'Londoner'
  - History, local knowledge, diversity, role of city, plus many respondents were born here
- Like the fact that people come from all over the world to experience their home town
- Although, for most 'Londoner's London' compared to 'tourist London' is very different as their local knowledge allows them to experience the city in way tourists can't
- There are however, many attractions that they have never visited e.g. London Eye, Tower of London, Madame Tussauds etc, that are still interesting to some

To Londoners the city is about the hidden gems <u>as well as</u> the mainstream attractions – can both be made more accessible?

## Local knowledge is prized and particularly strong



Many felt that "I know this city like the back of my hand"

#### However:

- What is more often true is that they know their local area/part of the city really well but less so further afield
- · Sometimes feel they don't have a reason to leave their area
- Scale can be daunting even for those living in London all their lives
- Some fear of unknown areas exists for those living further out

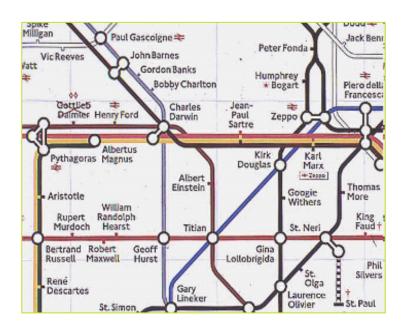
A sense that many would welcome inspiration to discover new hidden gems extending the definition of <u>local</u> further afield

## Relationship with transport

 Understand the transport choices made by people living within convenient access to the London Overground network

### **Current Travel Attitudes and Behaviours**

- Londoners think they are extremely well versed in their travel options
- Making informed decisions around transport
- This knowledge driven by:
  - Comprehensive transport network, myriad options
  - Difficult to use the car in central London because of CC, parking, congestion and forced to use other modes
  - Strong sense of pride in being savvy about transport options- knowing London transport makes you a Londoner



## Less frequent journeys require more planning

Habitual

- Majority of journeys are habitual, e.g. daily commute, shopping trip, school run
- Very entrenched behaviour, hard to change
- Most think they know the options already
- Change will only come as the result of presentation of genuinely alternative transport options or of more atoms of argument to persuade

Occasional

- When making more occasional decisions around transport, for example trips to less often visited shopping areas, visiting people for the first time, meetings in new locations
- People are likely to explore options here. Most will have hypotheses about how to get somewhere, but may check these against journey planner etc.

Singular

- Journeys seldom taken, need to investigate and find out how to get there
- Again, likely to have some idea, but will definitely have to research

Most common journeys

Least entrenched behaviour

## 'Turn up and go' culture

- Despite planning less frequent journeys, there was some evidence amongst our sample of a development of demanding expectations for the arrival times of transport
- This is mainly among Tube users, who deem it implausible and unnecessary to check for times of trains due to their frequency
- This taps into a wider desire for perpetual motion, need to always be moving
  - Waiting time can be seen as dead time



Frequency of service is the main factor that can achieve this desire to keep moving but there is also opportunity to occupy this still time e.g. flowers, posters, vendors etc.

## The peak and off-peak mindset

#### Peak = commute

- Peak time journeys are ultra-rational and functional rather than emotional
- On peak is always about getting to the destination as quickly and easily as possible
- People <u>know</u> the best journey for the route they take to work everyday – very regimented, little time/patience for disruptions
- The morning commute is one of heightened propensity for agitation
- How you get there isn't as important, as long as you are on time (destination is more important than the journey)
- Have little choice have to go to work
- 'Put up' with discomfort and crowding
- Coping mechanisms come into play

#### Off-peak = leisure

- Off-peak journeys lack routine destination varies
- Off peak journeys are taken during personal time, expect more
- More of a holistic experience the journey can be as important as the destination
- A more leisurely journey less pressing schedules
  - But pre-family still quite speed focused and often claim to always be late
- Waiting time is more acceptable, although some will check times for some journeys/modes
- Can also mean a less direct mode is more acceptable
- Less people, less stress

Leisure journeys taken off-peak come with a different set of expectations to peak, how well these can be delivered against will set a mode apart

### Off-peak powered modal choice



- Pan-London coverage (to the most part)
- Tube is the default for new journeys
- The network is hardwired into most Londoners → little need to plan
- Feels controlled in terms of navigation as well as safety
- Known and reliable journey times (but also written up)
  - "I know how long my journey will take from experience"
- Lots of trains, one every few minutes (allows for personal and system errors)
- Interchanges feel easy for longer journeys



- Serves the parts of the city where the tube doesn't go
- Can be fast on certain routes, bus lanes can help
- Good for medium length journeys
- Door to door
- Run all night night bus community, sociable...
- A little bit more human, driver contact
- Views out of the window, seeing the city and the journey
- Can be appreciated for its more leisurely pace
- However, this is the most polarising of modes → people either like or don't use



- Car ownership is much more prevalent in **outer London** (Watford area especially)
- Offers ultimate freedom door to door
- Protective and personal space for the whole family
- The definition of the weekend vehicle (me time)
- Comfortable
- A passion
- A luxury I deserve, why would I choose to do something unpleasant by getting PT

## Off-peak sustainable modes

- For a smaller number of respondents there was evidence that sustainable modes were also being used
- These are for a combination of utility and solely leisure purposes:



- Growing in popularity, a number of respondents claim that they are taking up cycling again
- Riding around the city and Green Spaces is something which many enjoy
- A leisure pastime as well as a 'mode'
- A passion and good exercise
- Often looking for new ways to enjoy this passion



- Everyone could do this
- Not spoken about as a 'mode' more as part of wider leisure activities e.g. walk in the park or along the Southbank
- A means to an end, not high consideration
- N.b. some reluctance to walk too far, to and from other modes and destinations

Are there any ways the LO can capitalise on these 'leisure' interest areas in its promotion?

## An ideal off-peak journey satisfies all needs



...whereas for peak the basics are enough

## **Perceptions of London Overground**

- Explore awareness of the services offered by London Overground
- Fully explore the motivators and barriers to using London Overground off-peak
- Understand the basis from which barriers are derived
- Understand how peak-time London Overground users feel about the service to understand where motivators can be leveraged to encourage off-peak usage

## Some clear differences between peak users and non users



- As part of the methodology we spoke to people who used London Overground at peak times as well as those who never used
- Across the sample the biggest unifying factor limiting off-peak usage is a full awareness of what the London Overground is and where it goes
  - Those using during peak often only know their own route
- Although, for those who never use the London Overground there are additional perceptual barriers which can limit consideration
  - But, on further discussion of improvement plans (and when experienced first hand) these 'barriers' seemed to become less significant

## Motivators for those using at peak



- Unsurprisingly it's <u>speed and practicality</u> that are used to rationalise choice
  - "I live in Camden and work in Richmond, it just makes sense"
- For those who have migrated from the tube have found the experience more pleasant
  - View from window "wakes me up in the morning"
- Some lines are quite busy but others are less crowded than other modes <u>allowing some</u> <u>personal space</u>
  - NLL very busy whilst Clapham line less so "sometimes it's so quiet, I hope they don't cancel the service"

Speed and practicality make the London Overground perfect for certain routes at peak...

## A combination of lack of knowledge and negative perceptions limit consideration

Gaps in knowledge

Where does the London Overground go? Network coverage

Why would I want to go to these places? Places of interest

What is the London Overground?

Awareness of LO

Why the London Overground? Benefits of LO

Safety

It feels like it wouldn't be that safe

It's too much of a hassle, I can't just turn up and go Frequency

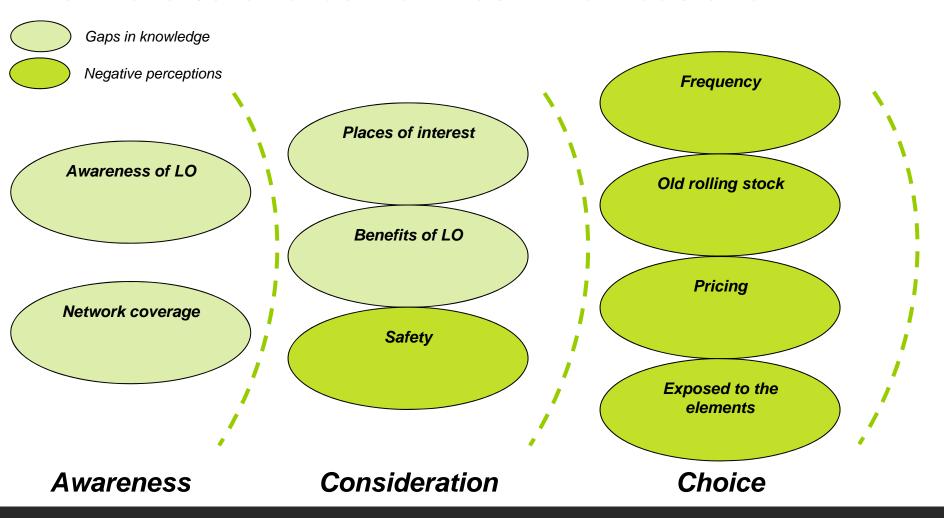
Negative perceptions

It's more expensive than the Tube and I can't use my Oyster **Pricing** 

It's outside so it can be cold and wet Exposed to elements

It's really unreliable Old rolling stock

### Barriers to overcome in communications



The most pertinent barriers to address in the short term are related to Awareness and Consideration

## Awareness: limited awareness of network, even amongst users

"I always head east to Dalston, I have no idea what's the other way" Pre-family

"I use the Richmond line all the time, it's much quicker than the Tube" Empty Nester

- Even for those who use every day, knowledge in the London Overground where the network goes beyond their route is limited
  - When shown the map there is latent understanding but few had spent time looking at, despite the admission that it is displayed in carriages
- However, is this lack of awareness of complete network so different to other modes?
  - This can be a combination of strong awareness of branch but limited understanding the umbrella term - 'Overground'
- For non users knowledge is unsurprisingly even lower, some are aware of where their local station is but beyond that knowledge is foggy

One of the biggest challenges is to raise awareness of the London Overground network in its entirety

## Awareness: confusion around the LO centres around 3 areas

#### Name

- The term 'Overground' (or 'overhead' or 'overland') have long stood for any London train service that isn't the Tube
- The TfL definition of Overground is just one part of this

#### Operator legacy

- Through a lack of understanding and to make the network more manageable users have continued to use the names operators pre TfL takeover
- As well as the lines themselves e.g. Richmond or North London Line



#### Roundel

- Visual identity of the roundel is commonly mistaken for the Underground
- A commonly held misconception but one with extra emphasis given the other areas of confusion

This indicates potential to build the London Overground 'brand', potentially by leveraging the known elements e.g. the names of the lines

## Awareness: names of the stations can lack familiarity

"I went to visit my friend in Brondesbury. I had no idea that was so close to Kilburn!" Pre-family

"This isn't clear as Gunnersbury is pretty much Chiswick, but you'd never guess" Young Family

- The London Overground network operates a more peripheral service as it doesn't cover as much of central London
  - Largely outer London, generally residential and sometimes suburban which can lack the automatic associations of central London areas
- Some areas covered are well known (e.g. Tottenham, Highbury, Hackney etc.) but aren't seen to have much to offer visitors
- Within this is the idiosyncratic, but accurate, naming of stations which can have little relevance to people from outside the area
  - E.g. Gunnersbury and Chiswick, Brondesbury and Kilburn etc.

There are many attractive destinations along the routes but there is also potential to develop a wider awareness of the stops and their immediate vicinity

## Consideration: the network does cover areas of interest







 Across the sample there was a clear consensus of the most appealing destinations, especially the green spaces

#### Green spaces

Hampstead Heath, Richmond Park, Kew Gardens, Regents park

#### Cultural/historical

 British Museum, Wembley, football stadia, Kensington Olympia

#### Nights out

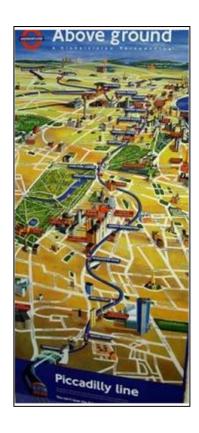
Stratford Theatre, Hackney Empire, Dalston, Camden

#### Leisure Shopping

Westfield, Camden Market, Watford, Dalston market

There is huge interest in visiting the Green Spaces across all of the lifestages, but there is a capacity to learn more...

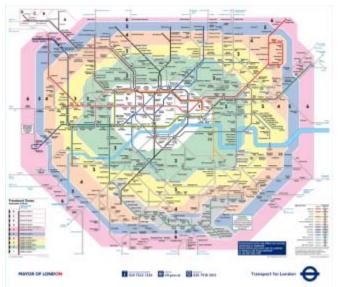
## Consideration: making the lines 'come alive'



- The low awareness of some of the stations along the lines represents an opportunity for education, playing into Londoner's innate desire for local knowledge
- The scale and heritage of the city means that there is likely to be many 'stories' that can be brought to the fore to encourage exploration
- A way of achieving this could include line based promotion (similar to that seen on the Piccadilly line)

Opportunity exists to celebrate the hidden gems as well as the that exist as well as places they are already aware of, building overall knowledge

### Consideration: why take LO over another mode?



- Londoners have a wealth of transport options and any one journey can often be made by a variety of means
- This means that a mode needs to <u>offer something</u> tangible that makes it more considered
- For the London Overground there are many places along the route <u>unique and more direct</u> when using the network
- Beyond this the LO has <u>practicality benefits</u> afforded by a greater amount of space, depending on busyness:
  - Links well into other activities such as cycling
  - Can fit more luggage and pushchairs

There are many rational benefits to the London Overground but it is the emotional ones which are more unique....

## Consideration: the LO's emotional appeal

- The London Overground has practicality benefits over other modes in accessing points across London
  - But, for many of the people who use at peak and for those who conducted the post task there are more emotional benefits

#### Speed and ease





- Many were genuinely surprised at the easygoingness of the mode
- Journey times are short and trouble free
- Above ground contributes to a sense of freedom
- The London Overground runs to its own schedule, no traffic
- Smoothness of journey, comfortable

#### **Views**





- The London Overground gives a **unique viewpoint** of the city
- Passengers are able to see London from a different perspective
- Familiar areas viewed differently
- "I took a journey by Overground and I could see the house I grew up in"
- Children enjoy this aspect

#### Rewarding



- The overall effect is that the London Overground has the potential to be an emotionally rewarding experience
- It manages to achieve many of the higher order psychological needs that are sought when travelling for leisure

With the London Overground the journey can be as valued as the destination

## Consideration & Choice: perceptions of the London Overground can be out of date



- The non users of the LO had either never used the Overground or had used some time ago
  - "Is the Overground steam?" Pre-family
- Therefore, many of their associations are weighted in the past and many of them are addressed by the work already being carried out by TfL
- The main perceptual barriers are:
  - Safety
  - Service frequency
  - Reliability
  - Cost
  - Exposed to the elements

By communicating the improvements being made to the network the negative perceptions are likely to be addressed and overcome...

# Consideration: safety is the biggest perception that can cause a barrier



 Due to the intensity of the emotions involved safety, especially after dark, is the most significant barrier to usage beyond awareness:

#### Exposed and trapped

- London Overground stations are <u>away from the main road</u> and out of sight
- Some respondents reported a sense of <u>feeling trapped</u> in this environment, should anything happen
- <u>Darkness exacerbates this</u> feeling, a well lit portion of darkness, feeling exposed

#### Can feel empty

- Some felt that LO stations are like "ghost towns" and unmanned by staff who could assist if needed
- Additionally, there is the feeling that LO stations serve as hangouts for teens who can intimidate other passengers

Improved perception of safety would increase consideration...

## Consideration: how can safety barriers be tackled?





• During the sessions respondents were shown examples of initiatives which are have either already been put in place or are part of the upgrade process:

#### All stations to be manned

- Felt by all to be the biggest factor that could make them feel safer when travelling by the LO
- However, those travelling either at peak or for the post-task felt that the presence isn't always that strong
- Staff all in one place, in ticket booth, often no-one on the platform itself

#### CCTV at stations and trains

 Not the answer in itself but reassuring, especially if staff are present in station and visible to driver of train

#### British Transport Police

- Very reassuring but few had seen these in practice
- Also, the general upgrading process has a subliminal effect upon these perceptions

Communicating the TfL presence at all stations and CCTV is the biggest positive effect upon safety fears

## Choice: service frequency and reliability



- Due to the 'turn up and go' culture on many of London's modes the London Overground can seem more rigid
  - The increased frequency of service along some of the lines (esp. the NLL, GOB, Clapham to Willesden Junction) was well received and will increase consideration
- Due to the perceptions of the network being old reliability and speed of the trains is questioned
  - Newer trains give the impression of an increased overall service including improved reliability
- When taking part in the post task many were pleasantly surprised at the speed of the journey
  - Compared to other modes "It only took me 40 minutes to get to Richmond, not long" Young Family

General improvements to rolling stock and frequencies will tackle these barriers

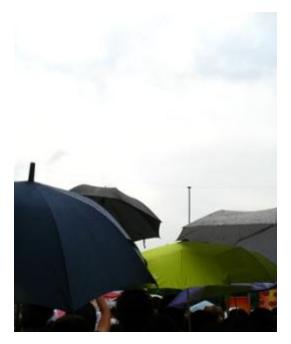
## Choice: many misconceptions surrounding cost



- There is a lot of confusion about how much the London Overground costs
  - Many assume that is an expensive service, a further indicator of a confusion between the London Overground and mainline railway services
- Additionally, there is also the perception that the London Overground isn't Oyster enabled
  - Thus adding to a perception of hassle
- When made aware of the cost and the fact that Oyster can be used many are pleasantly surprised
  - "I didn't know it was cheaper! That is a nice surprise, it certainly makes using the Overground more appealing"

A lesser barrier but one which demonstrates the pervasive misunderstandings around the London Overground

# Choice: exposure to the elements is a seasonal problem



- On the surface of it being exposed to the weather may appear a minor barrier, especially as the same is true of the bus and some of the Tube network
- This is likely to have an increased level of priority given the time of the research (February and also the week after the heaviest snow for 20 years)
- However, when considering modal shift from the Tube it begins to sound a more salient concern
- Many commented that London Overground platforms often have little to protect the waiting passengers
  - But, where shelters exist these are welcomed

Although not explicitly mentioned in the planned rejuvenation process, increased shelters would be welcomed

# Choice: upgrades likely to increase satisfaction upon use





- Further to the established reasons for using the London Overground the future developments offer an even greater incentive
- Whilst in the sessions people reacted positively to the new trains and stations these alone were unlikely to drive consideration
- These environmental improvements are likely to work towards a greater satisfaction with the service but less as an out-and-out motivator
- That said, the renovated stations and trains do work well to overcome the sense of unease surrounding safety on the London Overground
  - E.g. new trains, improved lighting, cleanliness etc.

Upgrade work can work well as an additional pull to the London Overground

# Choice: mostly positive response to the new train stimulus



- Due to perceptions of the age of current rolling stock the new trains were warmly received
  - Giving the impression of a modern and well maintained network thus contributing to feeling safe
- Primarily, comments centred on the new seating layout, these varied along the lines of:
  - Positive safety benefits "It would cut down on the numbers of kids hanging out"
  - Increasing passenger numbers "That will be good when it's busy, more people will be able to get on"

To

- Romanticising the existing layout "I'm not sure about that, it looks like the Tube. It doesn't look very sociable"
- Furthermore, not seen in the stimulus were the clear sightlines which have potential to allay safety fears

Broadly people these new developments are keenly anticipated by users and non users alike



# What does the future hold for London Overground?



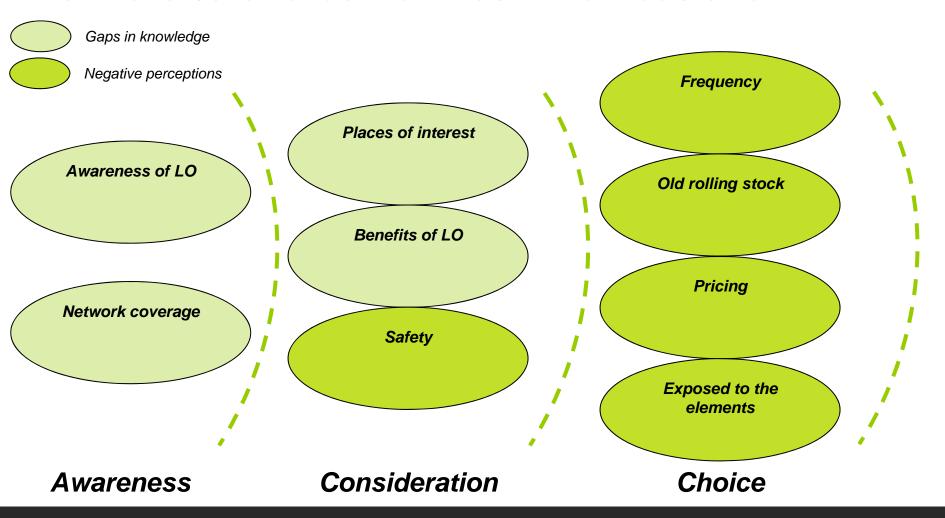
- Given the scale of the upgrade process, most respondents are fairly accepting and understanding of the timescales involved
- Also, the 2012 deadline of the Olympics means there is a general feeling that everything is heading towards this point



- Furthermore, there is a general sense that "everything is going east" which will make some of the London Overground areas more in demand
  - E.g. Stratford, Dalston, Hackney
- For those along the west London lines there are developments in the pipeline such as the orbitalisation of the network which is likely to increase appeal
  - Although, this wasn't announced at the time of the research

The future developments of the network and demographic shifts means that the LO is likely to become more and more relevant in coming years

## Barriers to overcome in communications



There are many messages which can be used prior to the completion of the programme of investment to increase off-peak usage

## Increasing awareness via communication

#### Awareness

- Develop the London Overground 'brand'
- Develop awareness of the network (compared to the other London train services)
- Increase presence of roundel and other visual signifiers

Initially 'brand building' may be required in order to increase comprehension of communications

## Increasing consideration via communications

### Consideration

- Communicate some of the key places of interest along the network (and make these more accessible via offers)
- Make the lines 'come alive' by communicating the less well known places and encouraging exploration
  - Potentially by inviting local people to assist in submitting 'stories' for their area
- Use the emotionally rewarding elements of LO within communication (e.g. ease of flow and views) either tonally or visually
- Additionally, more practical related benefits could be used to leverage leisure activities such as cycling
  - Combined with the amount of Green Spaces on the network
- On a more local and tactical level, improved safety aspects of the London Overground should be communicated

There are a range of communication messages that can be used to promote greater consideration of the London Overground

## Increasing choice via infrastructure

## **Choice**

- Perceptual barriers that exist relating to the London Overground which are based upon the legacy stand to be challenged by the development work currently underway
- There are however the key barriers and misconceptions that could be addressed in communications in order to increase choice
- In terms of communicating frequency, language that describes the London Overground as more 'like the Tube' could be effective once the programme has been completed
  - However, in the interim the current frequency of service could be communicated
- If there are developments being implemented relating to protection from the weather, communicating these could be advantageous

Communication would be effective in overcoming perceptual barriers both before and after these infrastructural initiatives