Increasing Oyster registrations

09037

July 2010

Research conducted by Synovate

Contents

Research overview

Approach

- Quantitative approach.

- Telephone interviews among a representative sample of 1,000 London residents aged 16+, including:
  - 526 interviews with Oyster card users (excluding Freedom Pass / Staff Pass users)
  - 453 interviews with Oyster PAYG users

- Fieldwork integrated with the Oyster Quarterly Tracking research, conducted between 11th and 31st January 2010.

- See Appendix 1 for overall sample profiles

Summary

- **Registration is a low involvement, low impact process.**

- **Benefits of registration have appeal, but are not strongly motivating, especially after initial point of purchase.**

- **If registration is not mandatory, registration needs to be incentivised and made easier.**

- **A range of initiatives are required to increase likelihood of voluntary registration.**
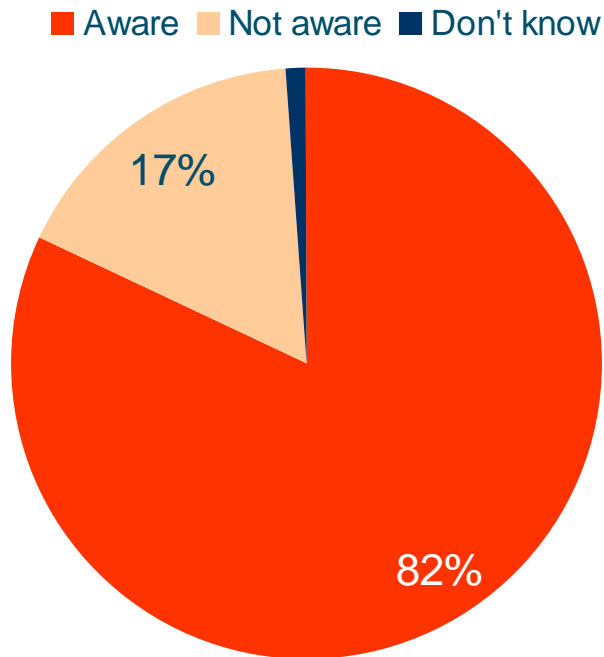
Key findings:
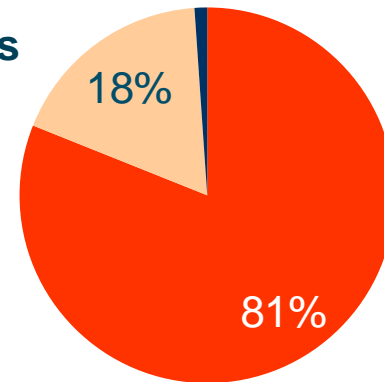
Registration is a low involvement, low impact process.

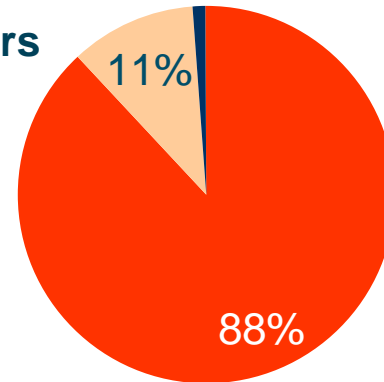# Almost one fifth of customers don't know what 'registration' is.

All Oyster users

■ Aware ■ Not aware ■ Don't know

17%

82%

PAYG users

18%

81%

Period users

11%

88%

Just over half of customers claim to be registered. This increases slightly with prompting about the process of registration.

All Oyster users

- ■ Registered (unprompted)
- ■ Registered (after prompting)*
- ■ Not registered
- ■ Not aware

52%

18%

23%

7%

59%

PAYG users

19%

50%

24%

6%

56%
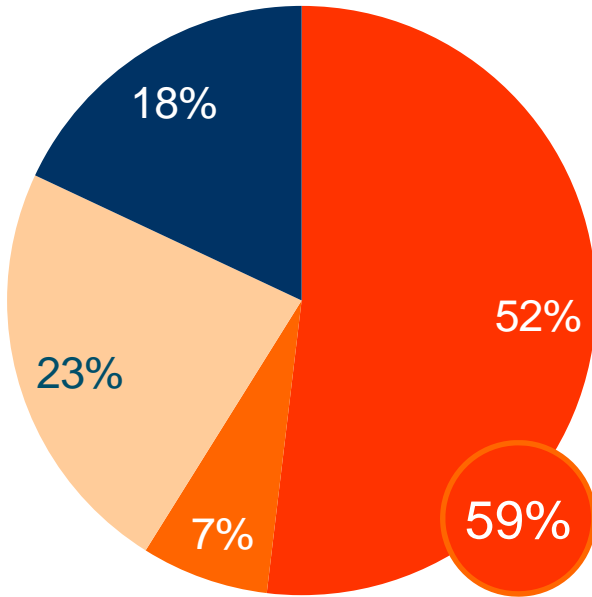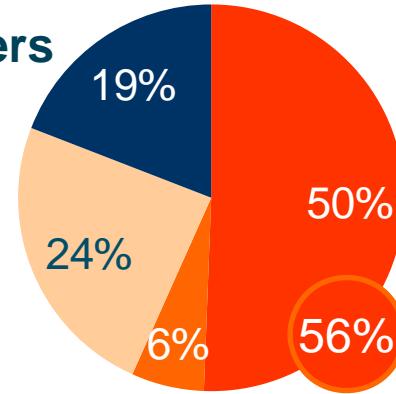
Period users

Almost all of these unregistered Period users are **weekly** period ticket users

12%

16%

7%

64%

72%
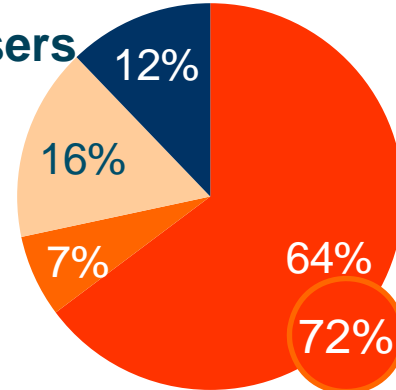
*Source: OYST16 - Can you tell me if you have registered your Oyster card? / *REG7 - When you first got a Monthly/Annual pass/ Travelcard on Oyster, you would have been required to fill in some personal details in order to get your ticket. These would have been used to register your Oyster Card. Do you remember doing this? / *REG8. - When you first got your Oyster card you might have been asked to complete a paper leaflet with your personal details. These would have been used to register your Oyster card. Do you remember this?*
Base: all with Oyster PAYG or period (n=526) / all with Oyster PAYG (n=453) / all with Oyster Period (n=98)

# Customers' definitions of 'registration' may differ from ours. A higher than expected proportion say they registered online.

All Oyster users who claim to have registered their Oyster card

Completing paper leaflet first time got Oyster — 42%

Completing and returning paper leaflet later — 8%

Paper leaflet 49%

Signing up on TfL website for Oyster account — 42%

Over the telephone — 1%

Another way — 3%

Don't know — 5%

Highly linked to purchase channel:
If Ticket Stop: 61% by paper; 30% online
If station: 58% by paper; 37% online
If online: 5% by paper; 84% online

No significant differences between Oyster PAYG and period users
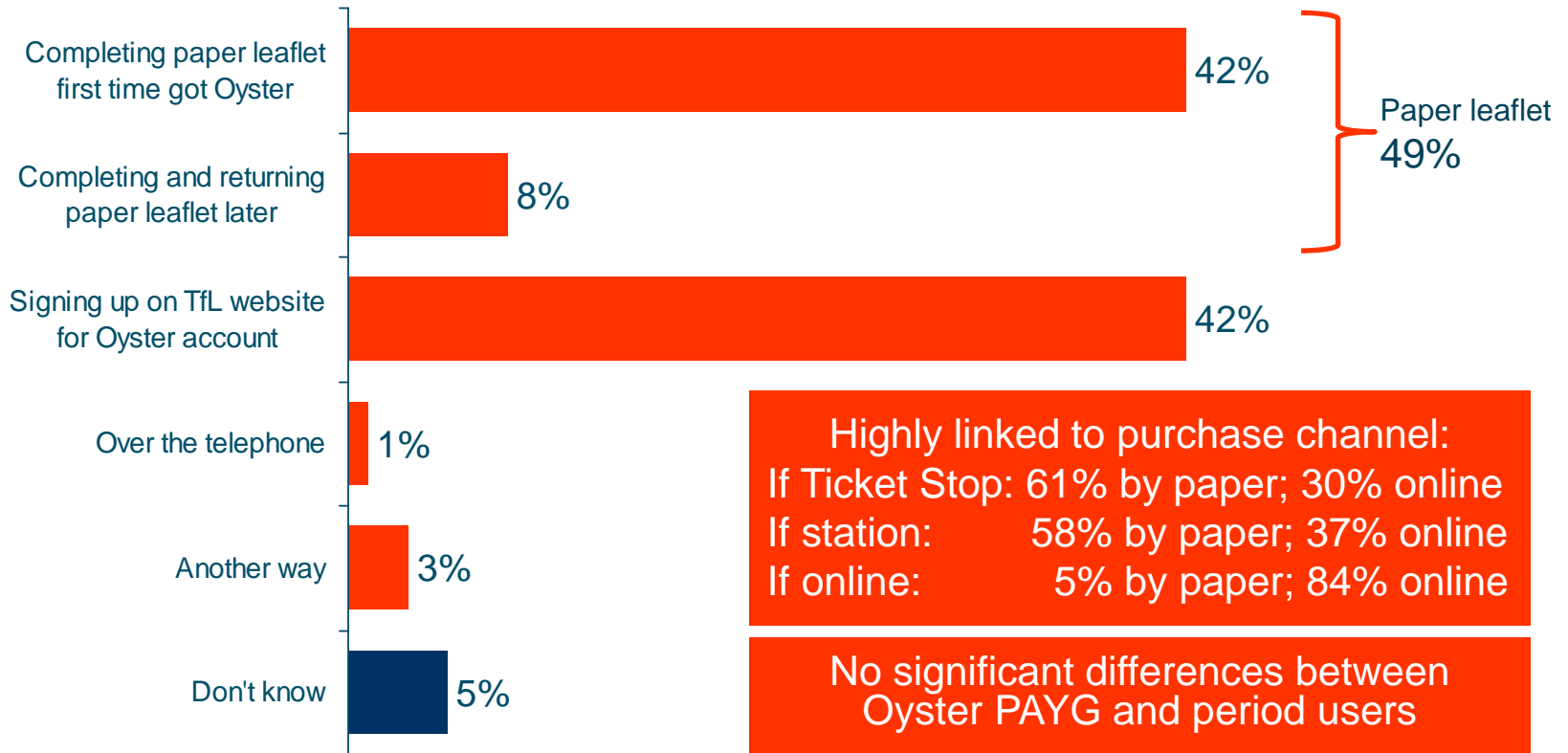
Source: REG6 - Do you remember how you registered your Oyster card? Was it...
Base: all who have claimed to have registered their Oyster card (unprompted) (n=270) / all Oyster PAYG users who have claimed to have registered their Oyster card (unprompted) (n=227) / all Oyster PAYG users who have claimed to have registered their Oyster card (unprompted) (n=62)

Further evidence of customer 'confusion': some receive or use services available to registered customers, but say they are not registered.

All Oyster users
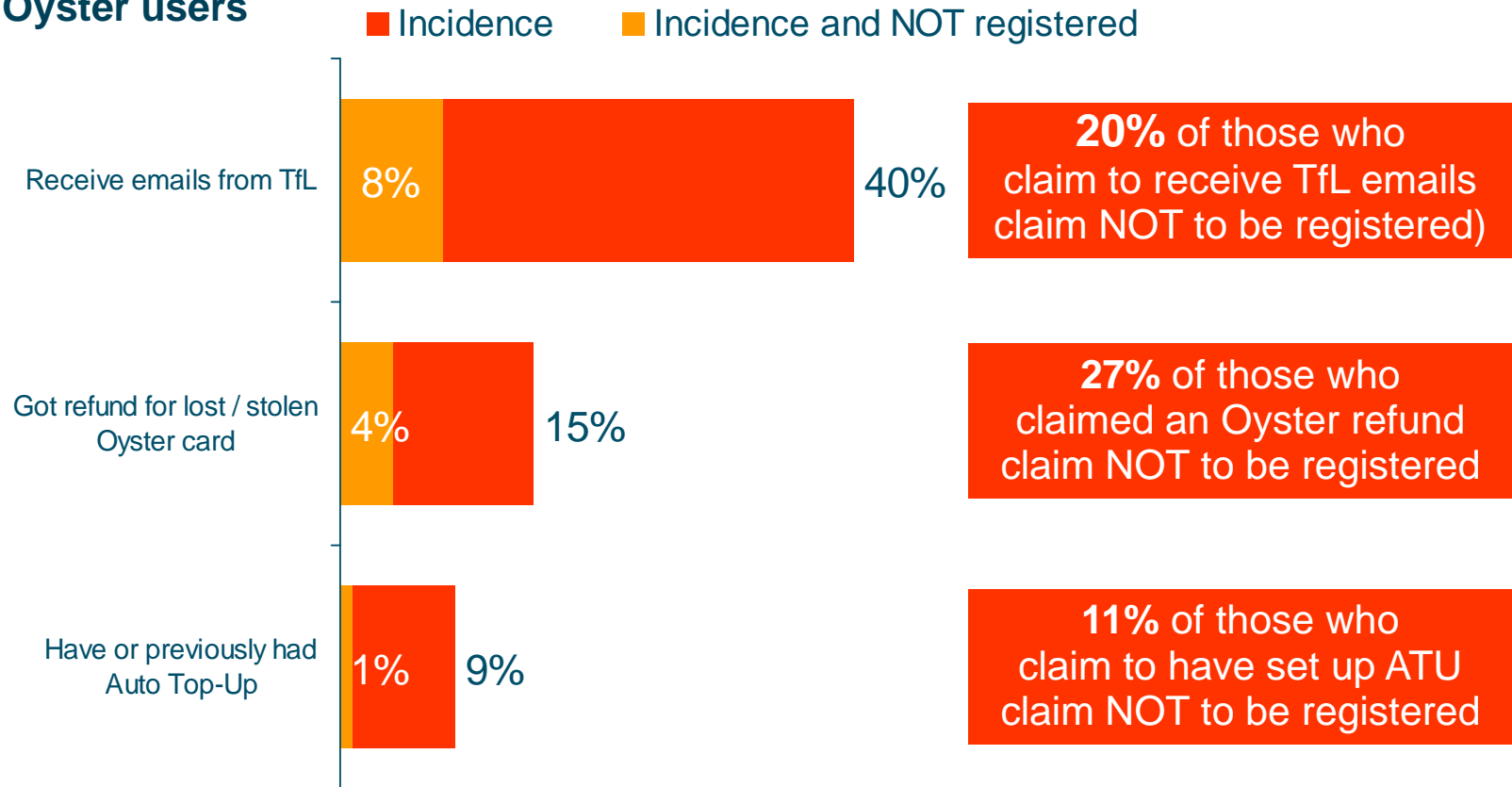
Legend: ■ Incidence ■ Incidence and NOT registered

Category	Incidence and NOT registered	Incidence
Receive emails from TfL	8%	40%
Got refund for lost / stolen Oyster card	4%	15%
Have or previously had Auto Top-Up	1%	9%

20% of those who claim to receive TfL emails claim NOT to be registered)

27% of those who claimed an Oyster refund claim NOT to be registered

11% of those who claim to have set up ATU claim NOT to be registered

Summary & Implications

Some customers aren't aware of what registration is, and whether they are registered.

- If the term 'registration' is used in communications, it may not be understood, or may not be understood in the same way by different customers.

- Customers providing their contact details - for a range of purposes - may consider this as 'registration'.

- Projections of increases in registration based on customer data may have a relatively high degree of error / variability.

- **Point of card issue is a key source of registrations**

  - Important to maximise this opportunity

More frequent mode users are more likely to claim to be registered.

All Oyster users: % registered

	5+ days / week	1-4 days / week	Less often	Non user
Bus usage	62%	62%	52%	47%
Tube usage	73%	62%	47%	36%
Train usage	68%	58%	58%	57%

PAYG customers who usually top up with a higher value, and top up reasonably frequently, are more likely to claim to be registered.

All Oyster PAYG users: % registered

	Up to £5	£5.01 to £10	£10.01-£20	More than £20
Usual top up amount	44%	47%	59%	62%

	At least weekly	Fortnightly	Monthly	Less often
Usual top up frequency	60%	59%	54%	36%

Those who bought their Oyster card at a Ticket Stop are less likely to be registered (and less likely to have had benefits explained).

All Oyster users: % registered

Where bought Oyster

LU station — 63%

Ticket Stop — 50%

Online* — 91%
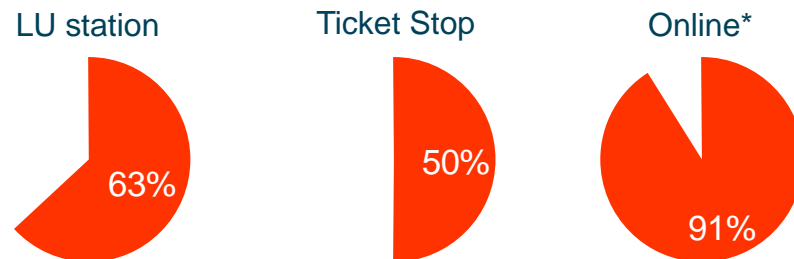
Were benefits explained at purchase?
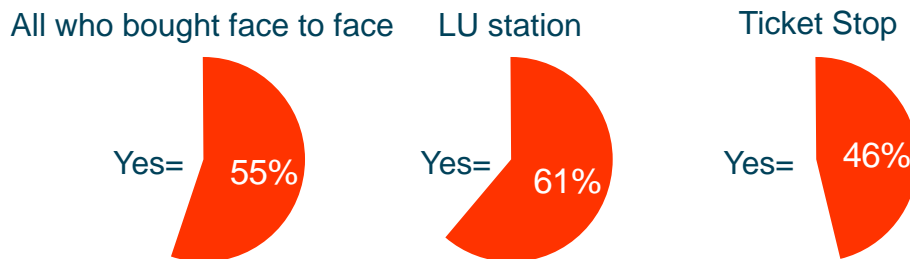
All who bought face to face — Yes= 55%

LU station — Yes= 61%

Ticket Stop — Yes= 46%

Summary & Implications

There are relatively few clear indicators of who registered customers are (or are not), beyond the fact that more frequent users of Oyster cards are more likely to be registered.

- The profile of currently registered customers gives relatively little guidance on who to target among the unregistered population.

Key findings:

Benefits of registration have appeal, but are not strongly motivating, especially after initial point of purchase.

The principal benefit is motivating to the majority of those who are registered.

All Oyster users who claim to have registered their Oyster card

Reason	Percentage
Protect if lost / stolen	62%
Had to (to get Oyster)	11%
To set up Auto Top-Up	7%
Advised to when buying	7%
Automatically registered	5%
To be able to use it online	5%
To get refund / deposit back	4%
To get discounts	3%
Other	Each <3%
No reason	2%
Don't know	4%

Fewer period ticket users made an active choice to register.

All Oyster users who claim to have registered their Oyster card

■ PAYG users
■ Period users

Reason	PAYG	Period
Protect if lost / stolen	61%	58%
Had to (to get Oyster)	9%	16%
To set up Auto Top-Up	8%	1%
Advised to when buying	7%	8%
Automatically registered	4%	8%
To be able to use it online	4%	8%
To get refund / deposit back	4%	8%
To get discounts	3%	7%
Other	Each <3%	
No reason	2%	3%
Don't know	4%	2%

Mandatory / No choice / To do something else
PAYG = 27% / Period = 40%

Source: OYST17 - Why did you register your Oyster card?
Base: all Oyster PAYG users who have claimed to have registered their Oyster card (prompted) (n=227) / all Oyster PAYG users who have claimed to have registered their Oyster card (prompted) (n=62)

Very few customers have specific reasons for not wanting to register. Most are either unaware of or not motivated by any benefits.

All Oyster users who claim NOT to have registered their Oyster card
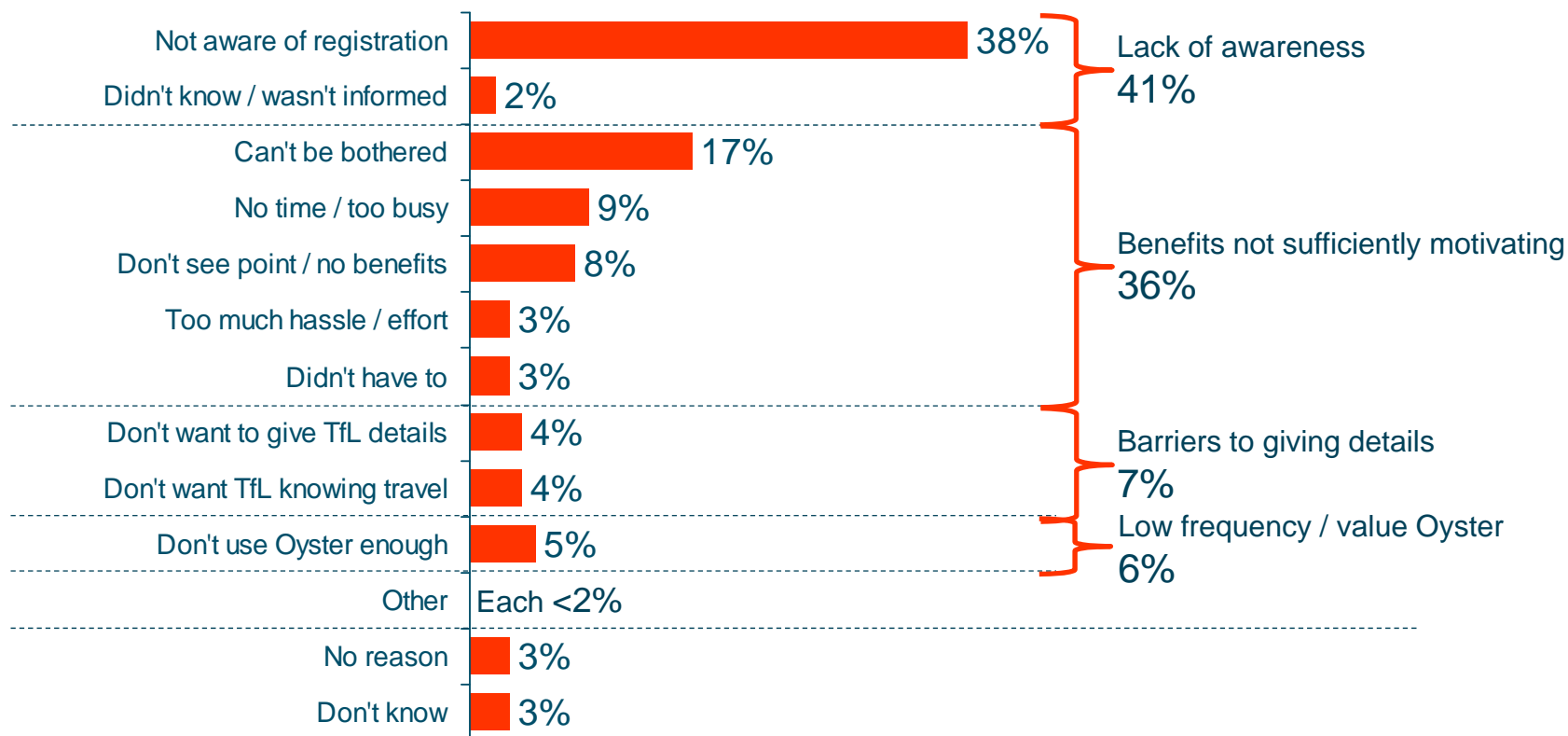
Not aware of registration — 38%
Didn't know / wasn't informed — 2%

Lack of awareness 41%

Can't be bothered — 17%
No time / too busy — 9%
Don't see point / no benefits — 8%
Too much hassle / effort — 3%
Didn't have to — 3%

Benefits not sufficiently motivating 36%

Don't want to give TfL details — 4%
Don't want TfL knowing travel — 4%

Barriers to giving details 7%

Don't use Oyster enough — 5%

Low frequency / value Oyster 6%

Other — Each <2%

No reason — 3%
Don't know — 3%

PAYG users are slightly more likely to find the benefits insufficiently motivating, feel that they don't travel enough, or be reluctant to provide their details

All Oyster users who claim NOT to have registered their Oyster card
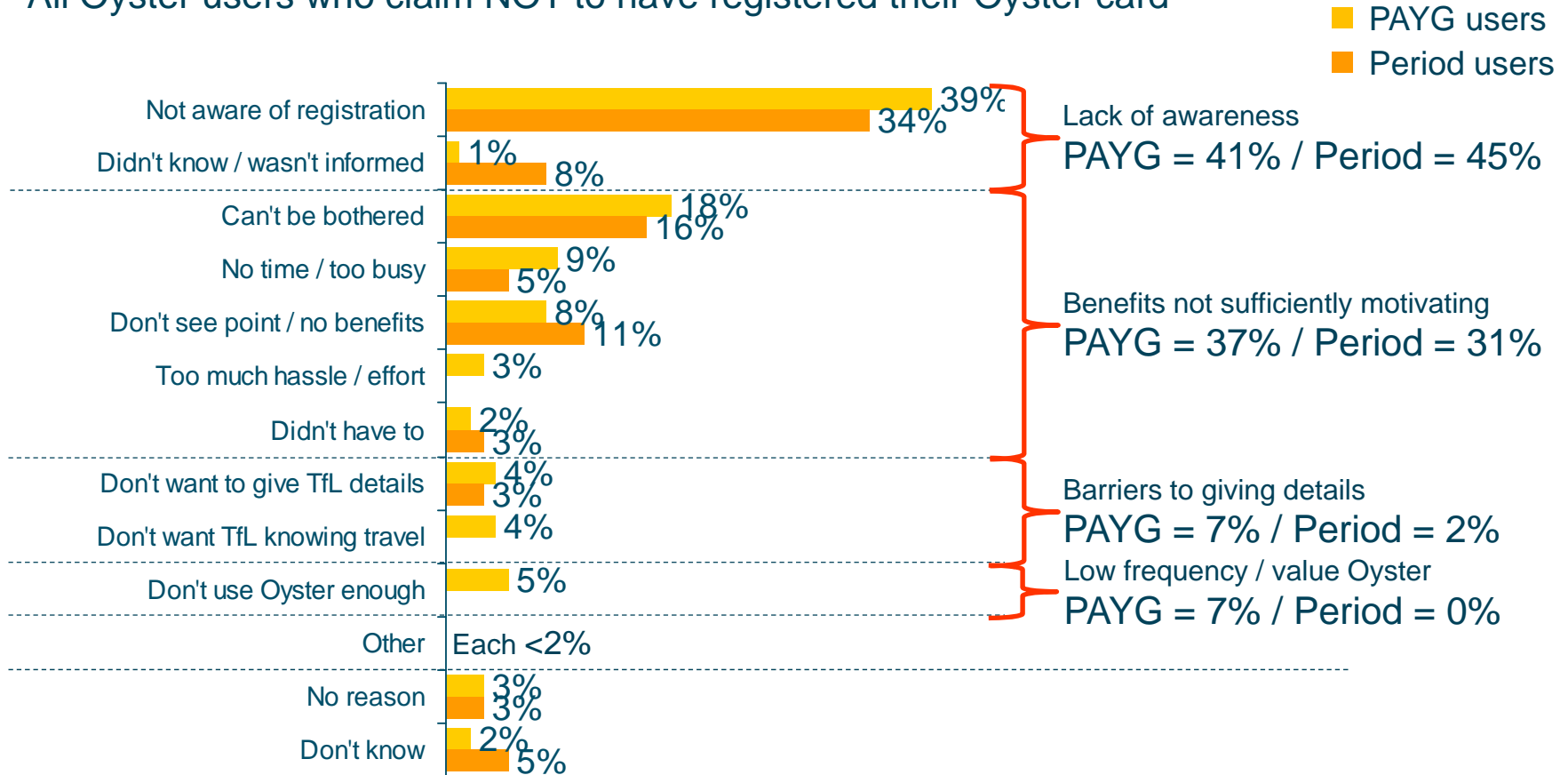
Legend:
- ■ PAYG users (yellow)
- ■ Period users (orange)

Reason	PAYG users	Period users
Not aware of registration	39%	34%
Didn't know / wasn't informed	1%	8%
Can't be bothered	18%	16%
No time / too busy	9%	5%
Don't see point / no benefits	8%	11%
Too much hassle / effort	3%	
Didn't have to	2%	3%
Don't want to give TfL details	4%	3%
Don't want TfL knowing travel	4%	
Don't use Oyster enough	5%	
Other	Each <2%	
No reason	3%	3%
Don't know	2%	5%

Lack of awareness
PAYG = 41% / Period = 45%

Benefits not sufficiently motivating
PAYG = 37% / Period = 31%

Barriers to giving details
PAYG = 7% / Period = 2%

Low frequency / value Oyster
PAYG = 7% / Period = 0%

A significant minority are not aware of the **card protection benefit**. This benefit is well liked, even among those not registered.

Awareness

■ Aware   ■ Not aware   ■ Don't know

	All with Oyster	Registered	Not registered
Not aware	22%	9%	42%
Aware	77%	91%	57%

Appeal

■ Like a lot   ■ Like a little   ■ Dislike a little / lot   ■ Don't know

	All with Oyster	Registered	Not registered
Dislike a little / lot	2%	1%	4%
Like a little	17%	14%	21%
Like a lot	79%	84%	72%
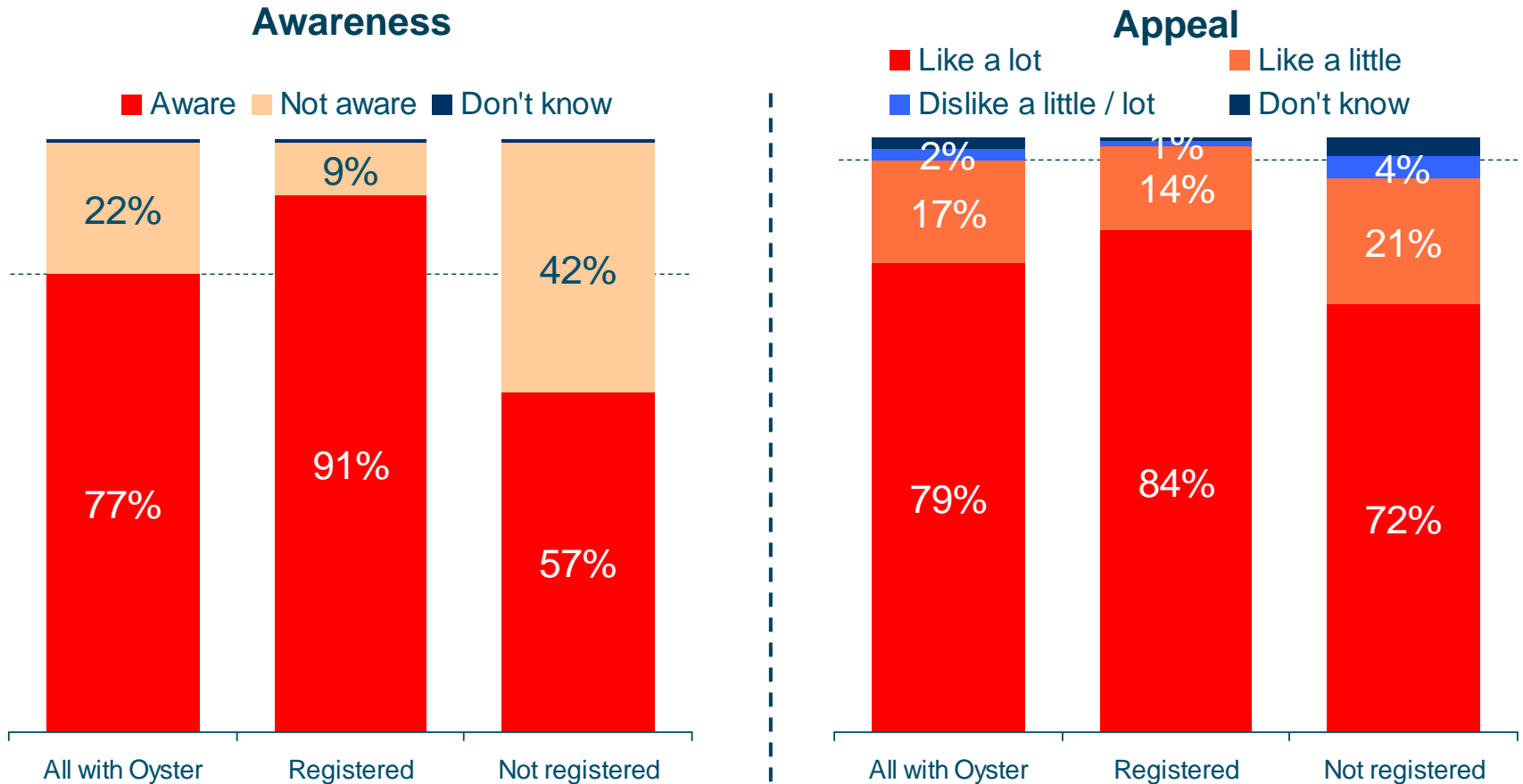
Source: REG12a - Were you aware that once you have registered your Oyster card, it will then be protected against loss or theft? / REG12b - How much do you like or dislike…?

Base: all with Oyster PAYG or period (n=518) / all who claim to have registered their Oyster card (n=320) / all who have an Oyster card who claim not to have registered it (n=198)

Less than half are aware that registration gives **access to information emails**. This is generally liked, but is not a benefit for everyone.

Awareness

Aware ■ Not aware ■ Don't know

- All with Oyster: 43% Aware, 56% Not aware
- Registered: 56% Aware, 42% Not aware
- Not registered: 23% Aware, 76% Not aware

Appeal

■ Like a lot   ■ Like a little
■ Dislike a little / lot   ■ Don't know

	All with Oyster	Registered	Not registered
Don't know	5%	4%	6%
Dislike a little / lot	11%	9%	14%
Like a little	29%	32%	24%
Like a lot	55%	55%	56%

Although liked, registration benefits are not strongly motivating for existing Oyster card holders who are not currently registered.

All Oyster users aware of registration who claim NOT to have registered their Oyster card

- 🟥 Definitely will
- 🟧 Probably will
- 🟧 Might / might not
- 🟦 Probably not
- 🟦 Definitely not

	All with Oyster	All with Oyster PAYG
Definitely not	20%	23%
Probably not	11%	12%
Might / might not	30%	28%
Probably will	28%	30%
Definitely will	10%	8%
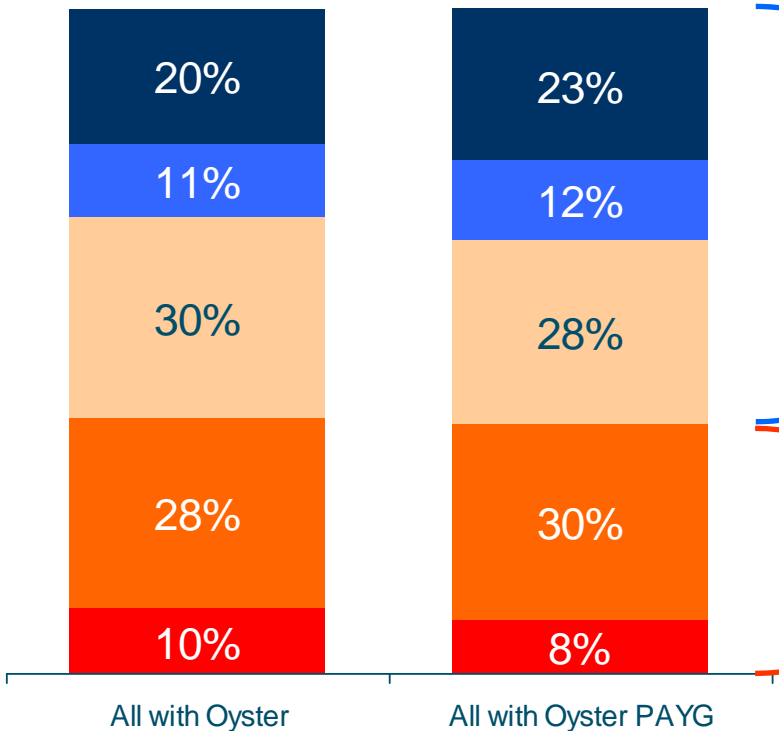
Main reasons for being unlikely to register in future *(if might / probably / definitely not - n=62)*:

Don't use it / top up a lot	31%
Don't want to give personal details	29%
No need / don't see point	10%
Can't be bothered / time / hassle	9%
Don't think will lose it / am careful	9%
Others total 28%, each answer <5%	

Few significant tendencies for target market. Female Oyster users significantly more likely to say they will register:
Female   56% 'definitely' / 'probably'
Male   18% 'definitely' / 'probably'

Source: REG13 - Knowing these things about registration, how likely are you to register your Oyster card [should you buy one]? /
REG15 - Why do you say that you might not / will probably not / will definitely not register your Oyster card?
Base: all with Oyster PAYG or period who are aware of registration but claim not to have registered their Oyster card (n=108) /
all with Oyster PAYG who are aware of registration but claim not to have registered their Oyster card (n=98)

When stated likelihood of registering is weighted down*, maximum likely volume of additional PAYG registrations is 16%.

weighting: 90% of 'Definitely will' / 25% of 'Probably will' / 5% of 'Might / might not'

■ Definitely will ■ Probably will ■ Might / might not
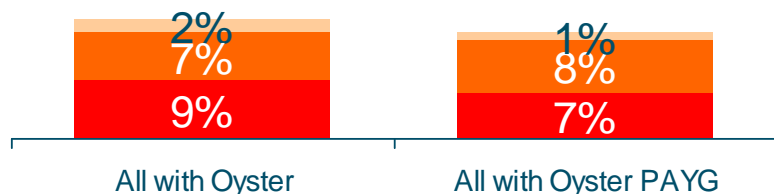
Approximates to **maximum** c.240,000 PAYG users in London.

Variability in claimed registration levels, and statistical variation in survey percentages means that this projection could range between c.125,000 - c.400,000.

NB. This assumes 100% awareness of registration and benefits

All with Oyster
- 2%
- 7%
- 9%

All with Oyster PAYG
- 1%
- 8%
- 7%

Summary & Implications

The benefit of card protection is salient for the majority of those who are registered, and is likely to have persuaded many to do so.

- There is still an opportunity to achieve some increases in registration by raising awareness of the benefits.
- Card protection is the most appealing benefit to promote, though information emails are also positively received by most.

But for a significant proportion of customers, awareness of the benefits is not sufficient to drive registration.

- There is little about registration that discourages most people. The challenge is to encourage – and for many this will take more than the existing benefits.
- Also need to overcome inertia/perceived hassle of registering – link to something they are already doing, e.g. buying Oyster, accessing service online

Key findings:

If registration is not mandatory, registration needs to be incentivised and made easier.

A number of incentives can increase the claimed likelihood of registering in future. These don't have to be 'monetary' incentives.

All Oyster users aware of registration who claim NOT to have registered their Oyster card

Legend: ■ Definitely ■ Probably ■ Might / might not

Incentive	Definitely	Probably	Might / might not	Total
Additional £5 PAYG	32%	32%	14%	78%
Additional £3 PAYG	15%	30%	14%	59%
Additional £2 PAYG	9%	28%	17%	54%
Additional £1 PAYG	6%	22%	13%	41%
Discounts and offers for shops, etc.	20%	30%	13%	63%
Priority access to tickets	21%	28%	13%	62%
One-off free gift	17%	19%	16%	52%
Free limited edition wallet	12%	18%	12%	42%
Prize draw	6%	21%	21%	48%
Only name and email address	23%	31%	17%	71%
Weekly 'things to do' email	7%	19%	13%	39%
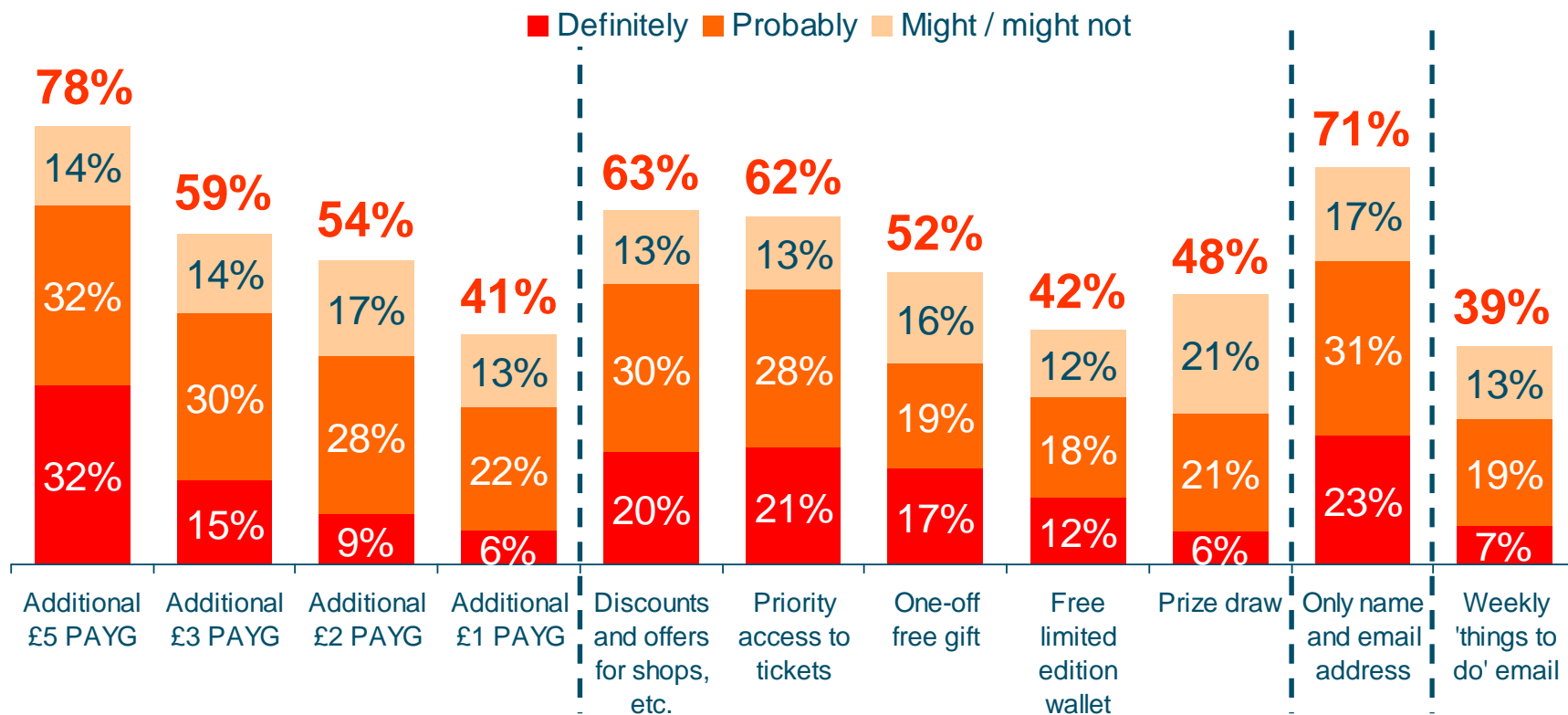
Source: REG16 - How likely would you be to register your Oyster card if...?
Base: all with Oyster PAYG or period who claim to not have registered their Oyster card (n=116)

Weighting* down claimed likelihood gives a more realistic (likely) understanding of what incentives are likely to be more effective.

weighting: 90% of 'Definitely will' / 25% of 'Probably will' / 5% of 'Might / might not'
All Oyster users aware of registration who claim NOT to have registered their Oyster card

Legend: ■ Definitely ■ Probably ■ Might / might not

Incentive	Definitely	Probably	Might / might not	Total
Additional £5 PAYG	29%	8%		38%
Additional £3 PAYG	14%	8%		22%
Additional £2 PAYG	8%	7%		16%
Additional £1 PAYG	5%	6%		12%
Discounts and offers for shops, etc.	18%	8%		26%
Priority access to tickets	19%	7%		27%
One-off free gift	15%	5%		21%
Free limited edition wallet	11%	5%		16%
Prize draw	5%	5%		12%
Only name and email address	21%	8%		29%
Weekly 'things to do' email	6%	5%		12%

Likely level without incentive

Source: REG16 - How likely would you be to register your Oyster card if...?
Base: all with Oyster PAYG or period who claim to not have registered their Oyster card (n=116)

The weighted likelihood of registering can be used to estimate the maximum likely take up among existing Oyster users.

NB. Numbers assume 100% awareness of registration/benefits.

maximum no. of additional Oyster registrations among Oyster users, assuming maximum awareness of benefits

All Oyster users aware of registration who claim NOT to have registered their Oyster card

Benefit	Value
Additional £5 PAYG	584000 (+/- c.140,000)
Only name and email address	446000 (+/- c.140,000)
Priority access to tickets	415000 (+/- c.140,000)
Discounts and offers for shops, etc.	400000 (+/- c.140,000)
Additional £3 PAYG	338000 (+/- c.140,000)
One-off free gift	323000 (+/- c.140,000)
Additional £2 PAYG	
Free limited edition wallet	
Prize draw	
Additional £1 PAYG	
Weekly email about 'things to do'	

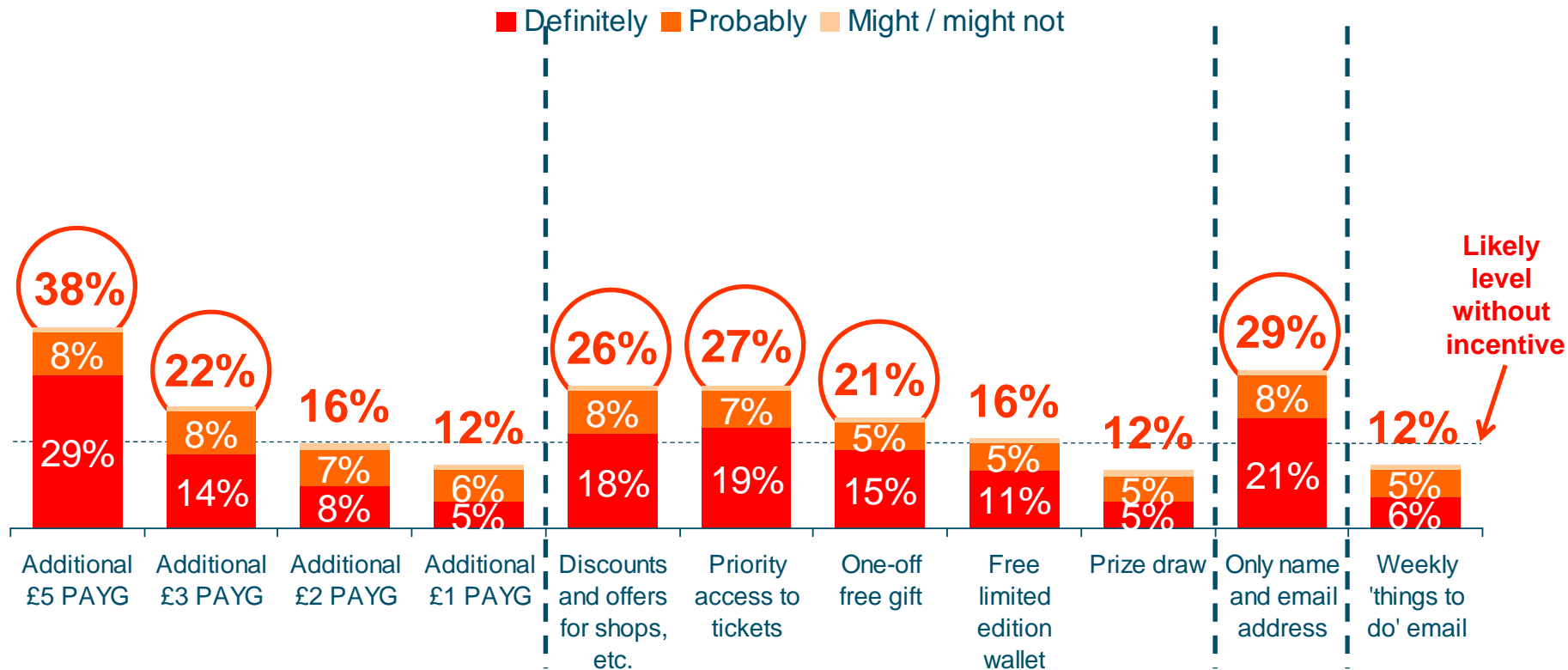Increase is comparable or below that obtained by simply raising awareness of benefits

Source: REG16 - How likely would you be to register your Oyster card if...?
Base: all with Oyster PAYG or period who claim to not have registered their Oyster card (n=116)
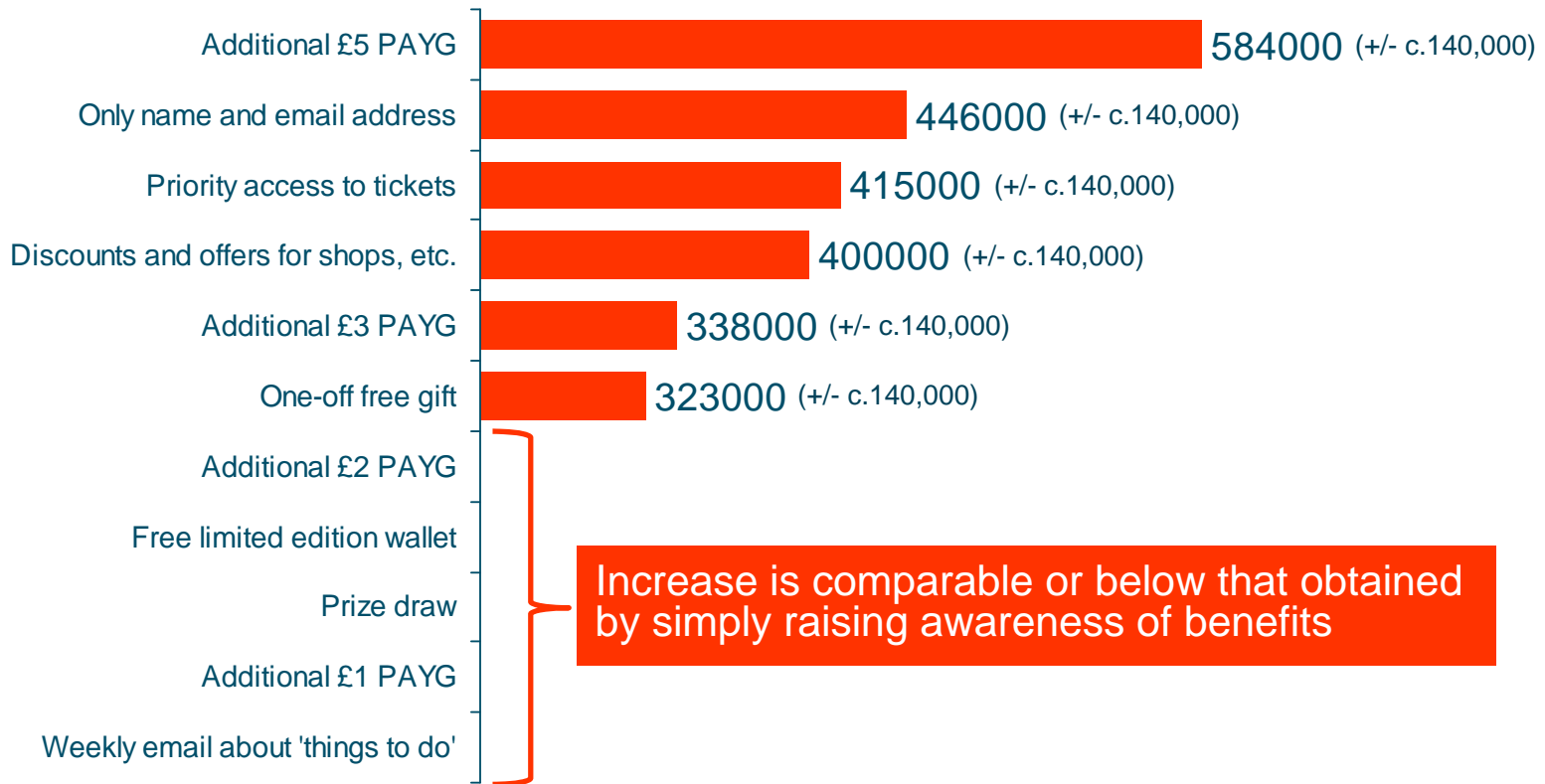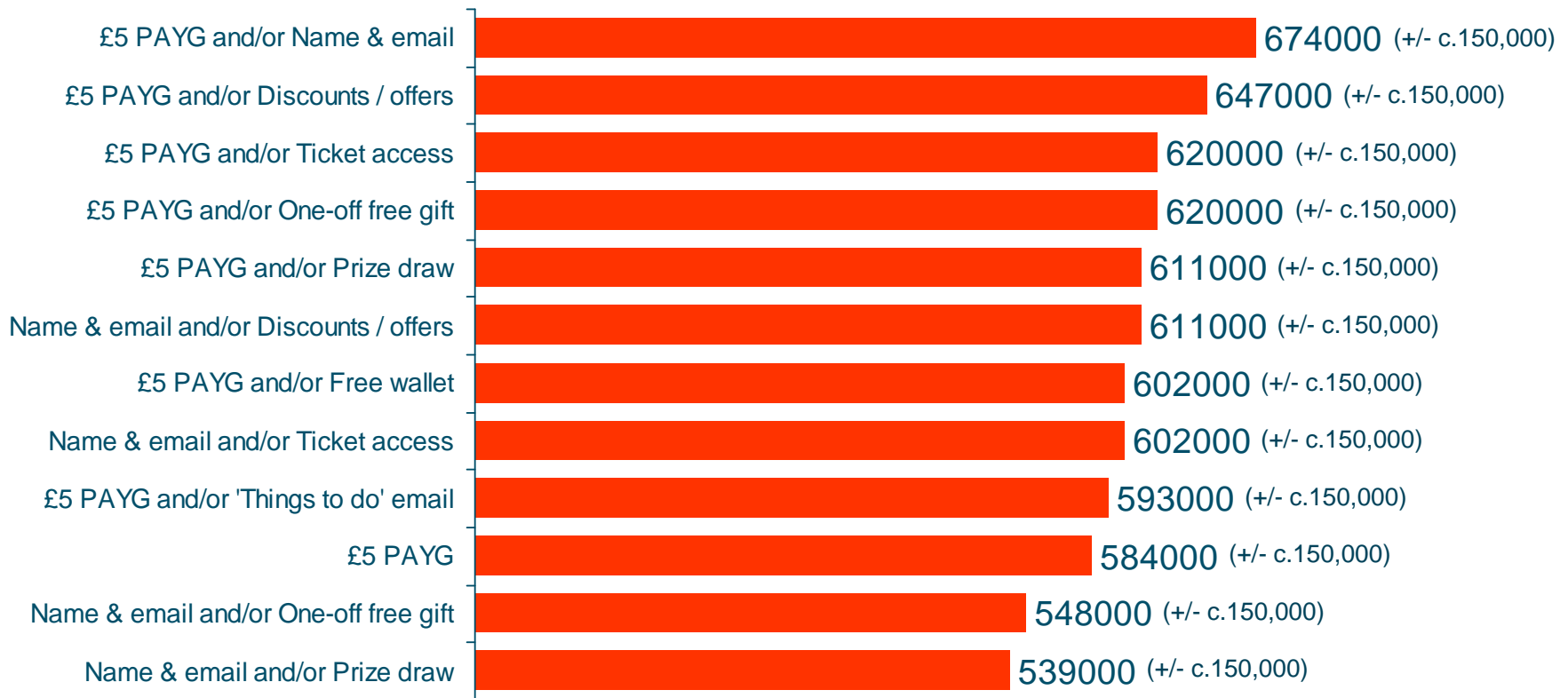
A wider reach can be gained through a combination of incentives. £5 PAYG is desirable, but not necessary for wide reach.

maximum *no. of additional Oyster registrations among Oyster users, assuming maximum awareness of benefits*
All Oyster users aware of registration who claim NOT to have registered their Oyster card

£5 PAYG and/or Name & email	674000 (+/- c.150,000)
£5 PAYG and/or Discounts / offers	647000 (+/- c.150,000)
£5 PAYG and/or Ticket access	620000 (+/- c.150,000)
£5 PAYG and/or One-off free gift	620000 (+/- c.150,000)
£5 PAYG and/or Prize draw	611000 (+/- c.150,000)
Name & email and/or Discounts / offers	611000 (+/- c.150,000)
£5 PAYG and/or Free wallet	602000 (+/- c.150,000)
Name & email and/or Ticket access	602000 (+/- c.150,000)
£5 PAYG and/or 'Things to do' email	593000 (+/- c.150,000)
£5 PAYG	584000 (+/- c.150,000)
Name & email and/or One-off free gift	548000 (+/- c.150,000)
Name & email and/or Prize draw	539000 (+/- c.150,000)

Source: REG16 - How likely would you be to register your Oyster card if...?
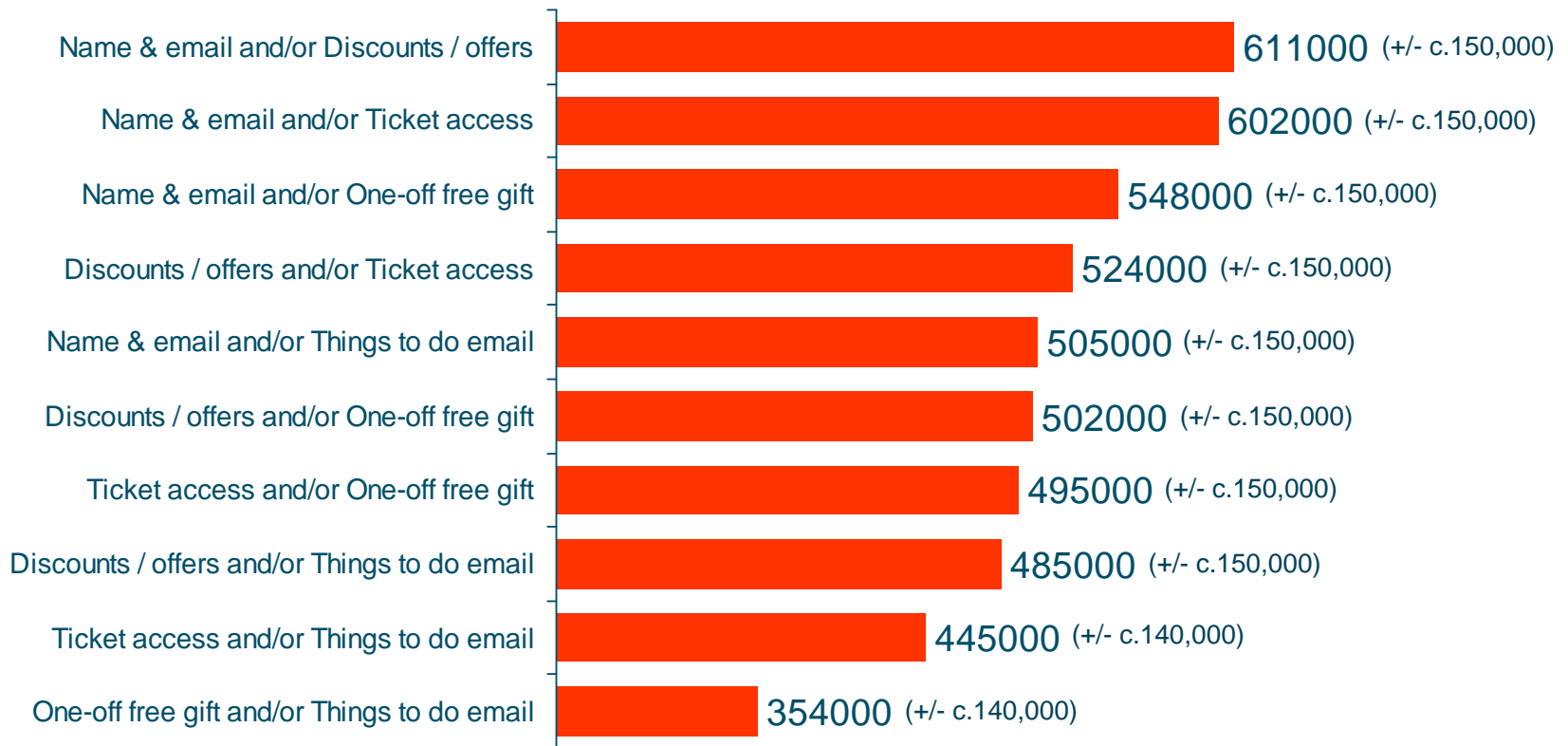*Base: all with Oyster PAYG or period who claim to not have registered their Oyster card (n=116)*

Offering a combination of non-monetary incentives can give greater likely registration than one single initiative deployed on its own.

maximum no. of additional Oyster registrations among Oyster users, assuming maximum awareness of benefits
All Oyster users aware of registration who claim NOT to have registered their Oyster card

Category	Value
Name & email and/or Discounts / offers	611000 (+/- c.150,000)
Name & email and/or Ticket access	602000 (+/- c.150,000)
Name & email and/or One-off free gift	548000 (+/- c.150,000)
Discounts / offers and/or Ticket access	524000 (+/- c.150,000)
Name & email and/or Things to do email	505000 (+/- c.150,000)
Discounts / offers and/or One-off free gift	502000 (+/- c.150,000)
Ticket access and/or One-off free gift	495000 (+/- c.150,000)
Discounts / offers and/or Things to do email	485000 (+/- c.150,000)
Ticket access and/or Things to do email	445000 (+/- c.140,000)
One-off free gift and/or Things to do email	354000 (+/- c.140,000)

Source: REG16 - How likely would you be to register your Oyster card if...?
Base: all with Oyster PAYG or period who claim to not have registered their Oyster card (n=116)
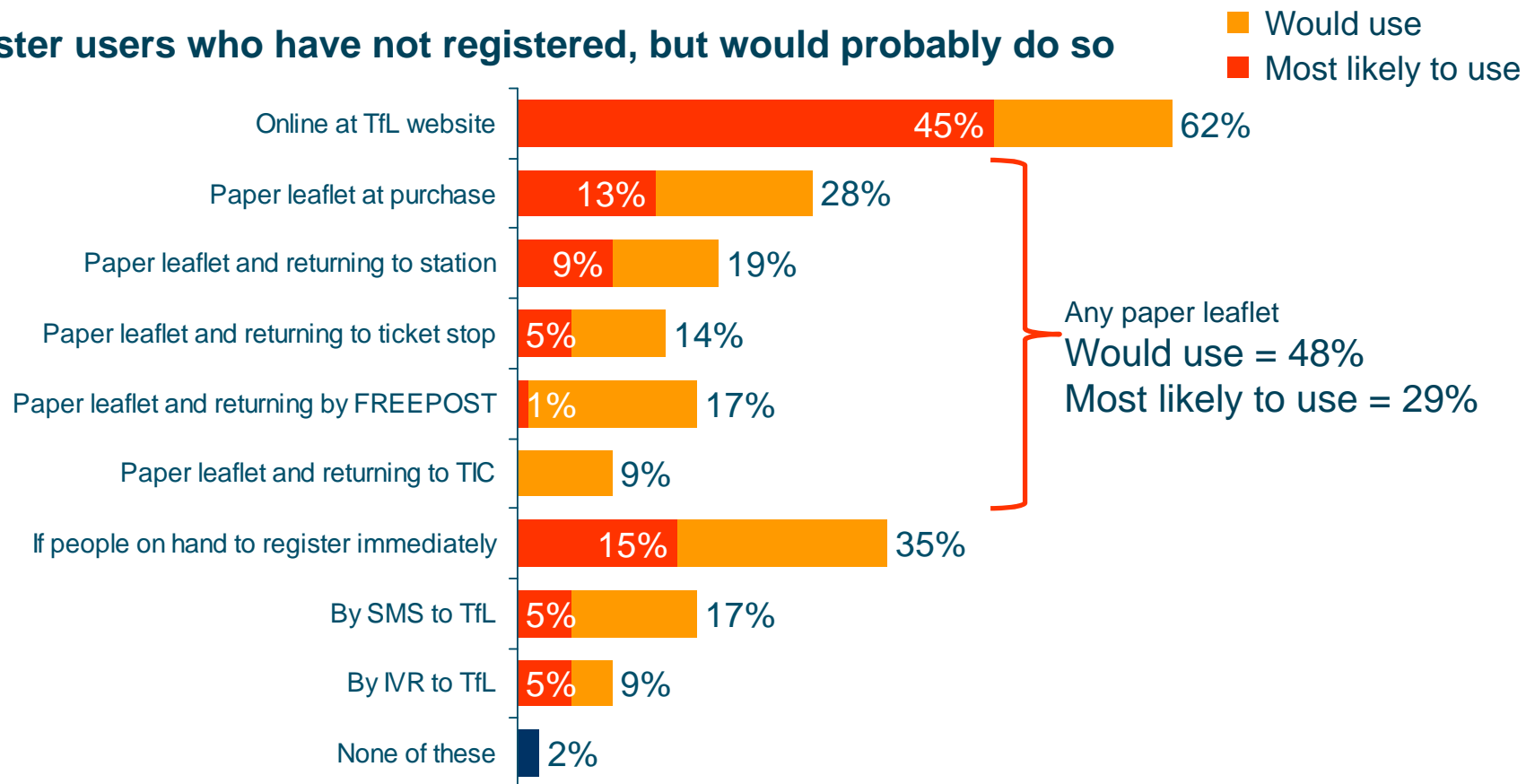
Summary & Implications

Likelihood of registration can be positively influenced by direct financial, indirect financial and non-financial incentives and initiatives.

- Registrations have to be 'bought' in some way.

- Relatively low cost inducements can encourage people to forget the 'inconvenience' and register their details.

- Offering more than one type of incentive / initiative can 'widen the net'. This is particularly important given the potential audience for registration is very broad (few are discouraged by the benefits)

- The apparently highly positive effect of just asking for name and email address confirms the 'hassle' factor of registration is real, but can be addressed. The business must consider what details are truly necessary, and which are most valuable.

Online is most popular registration route, but 'immediate' registration (either at point of card issue or afterwards) has a significant role.
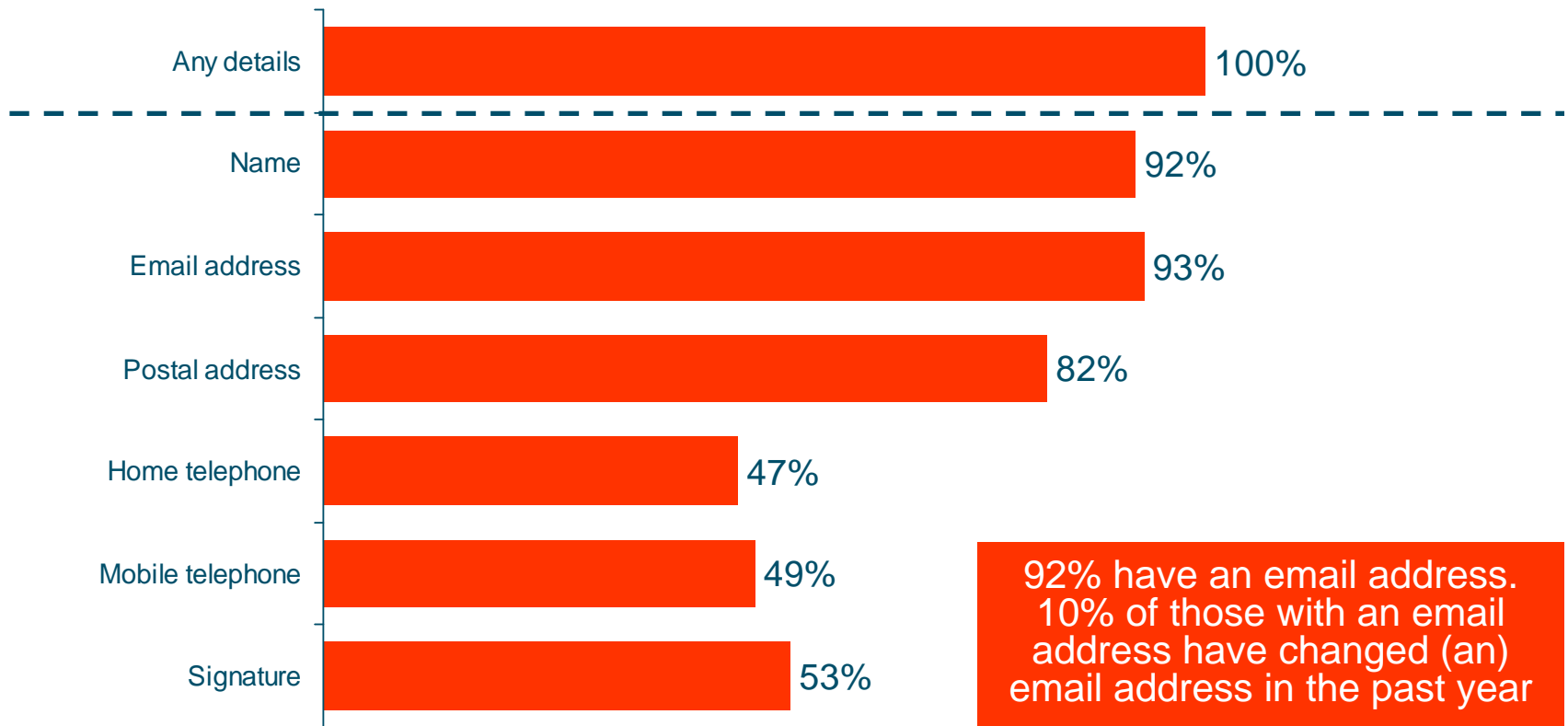
Oyster users who have not registered, but would probably do so

■ Would use
■ Most likely to use

Registration route	Most likely to use	Would use
Online at TfL website	45%	62%
Paper leaflet at purchase	13%	28%
Paper leaflet and returning to station	9%	19%
Paper leaflet and returning to ticket stop	5%	14%
Paper leaflet and returning by FREEPOST	1%	17%
Paper leaflet and returning to TIC		9%
If people on hand to register immediately	15%	35%
By SMS to TfL	5%	17%
By IVR to TfL	5%	9%
None of these		2%

Any paper leaflet
Would use = 48%
Most likely to use = 29%

Those who are likely to register are generally willing to provide an email address.

Oyster users who have not registered, but would probably do so

Category	Percentage
Any details	100%
Name	92%
Email address	93%
Postal address	82%
Home telephone	47%
Mobile telephone	49%
Signature	53%

92% have an email address. 10% of those with an email address have changed (an) email address in the past year

Summary & Implications

Most customers are willing and able to provide an email address. Many prefer to register online.

- There is not a fundamental barrier to collecting email address information for registration.

- This suggests that online awareness-raising initiatives might also serve as direct registration initiatives.

- TfL may receive greater quality data.

A significant proportion of customers prefer to register 'there and then'.

- Underlines importance of point of purchase.

- This reduces any perceived hassle or inconvenience.

- It minimises risk of customers 'forgetting' or 'not getting round to it': there are no reminders to register in most people's daily experience with Oyster, and no detriment to not registering.

Overall summary and implications

Overall summary

- **Registration is a low involvement, low impact process.**
    - Customers don't necessarily know if they are registered or not.
    - Registration is often a means to an end, not the end in itself.
    - Benefits of being registered are not apparent in daily use.
    - Not being registered doesn't hinder people's use of Oyster.
    - There are not specific customer types likely or unlikely to register, other than those who travel more frequently.

Overall summary

- **Benefits of registration have appeal, but are not strongly motivating, especially after initial point of purchase.**
  - There are few specific barriers or objections to registration. Benefits are liked significantly more than they are disliked.
  - Most reasons for not registering are related to convenience or hassle. Benefits of registration aren't strong enough to overcome these.
  - Even after explanation, relatively few are likely to register in future.
  - Note that 'registration' may not be offered or made explicit to customers, and benefits may not be explained.

- **If registration is not mandatory, registration needs to be incentivised and made easier.**
  - Likelihood of registering increases if 'valuable' incentives are offered.
  - Likelihood of registering increases if registration is easier.

Overall implications

- **Informing the target market:**
  - Benefits have fairly universal (albeit limited) appeal. There is not enough bias in the appeal/take-up of registration towards particular user groups to justify narrowing the target market by demographics, etc.
  - There is some evidence though that registration is more relevant to those with higher PAYG spend levels

- **Quantifying the opportunity:**
  - If all unregistered Oyster users were made aware of registration and its benefits, an estimated 240,000* extra registrations could be achieved
  - If additional measures are taken, this could realise over 600,000* additional registrations amongst existing card holders (depending on the package of measures/incentives).
  - If also aimed at new card holders, incentives are likely to improve registration rates amongst that group, though ease/encouragement at point of purchase remains the main opportunity.

* **Note that these estimates could be subject to considerable variability, of around +/- 150,000**

Overall implications

- **Improving registration levels/quality:**
- **A range of initiatives are required to increase likelihood of voluntary registration.**
  - Ensuring benefits of registration are raised at key points, particularly point of purchase:
    - *particularly cover if Oyster card is lost or stolen.*
  - Incentivising registration to increase weight of benefits over inconvenience factors:
    - *additional PAYG balance; retail discounts; priority ticket access.*
    - *could also explore further options around requiring registration for access to certain services*
  - Maximising channels for registrations to be completed:
    - *online and 'immediate' face to face registration (at initial card issue or afterwards).*
  - Reducing amount of details that are requested:
    - *name and email only is more motivating than £3 PAYG, retail discounts, priority ticket access.*
- **Field marketing activities may provide the necessary combination of impact, opportunity, incentive and convenience.**

Thank you

Any questions?

Appendix 1

Sample profiles

Sample profiles

	All Oyster users	Oyster PAYG users	Oyster Period users	Registered Oyster users	Unregistered Oyster users	Unregistered but likely to
Male	46%	46%	48%	45%	46%	21%
Female	54%	54%	52%	55%	54%	79%
16 to 24	21%	20%	28%	16%	28%	21%
25 to 34	34%	34%	34%	39%	26%	14%
35 to 44	22%	21%	22%	23%	21%	42%
45 to 54	16%	16%	12%	15%	18%	13%
55+	8%	8%	4%	8%	7%	9%
White	63%	66%	52%	64%	63%	70%
BAME	34%	31%	46%	34%	32%	25%
Any disability / impairment	4%	4%	2%	4%	4%	2%
No disability / impairment	95%	95%	97%	95%	95%	96%

Sample profiles

	All Oyster users	Oyster PAYG users	Oyster Period users	Registered Oyster users	Unregistered Oyster users	Unregistered but likely to
Working full time	57%	55%	63%	60%	53%	66%
Working part time	13%	14%	14%	15%	10%	8%
Other working status	28%	29%	22%	24%	35%	24%
AB social grade	23%	22%	27%	28%	16%	16%
C1 social grade	44%	43%	46%	43%	45%	48%
C2 social grade	11%	12%	9%	9%	14%	16%
DE social grade	12%	13%	10%	11%	14%	10%

Source: QEMPLOYMENT / QSEG
Base: all Oyster users (Oyster PAYG and / or Oyster Period, excluding Freedom Pass and Staff Pass users)

Sample profiles

	All Oyster users	Oyster PAYG users	Oyster Period users	Registered Oyster users	Unregistered Oyster users	Unregistered but likely to
Bought at LU station	43%	44%	42%	46%	39%	55%
Bought at Ticket Stop	28%	29%	20%	23%	33%	41%
Bought online	6%	4%	11%	9%	1%	0%
Among PAYG users only…						
Top up mostly at LU TO	18%	18%	6%	14%	22%	23%
Top up mostly at LU POM	35%	35%	37%	39%	31%	31%
Top up mostly at Ticket Stop	36%	36%	42%	32%	41%	44%
Top up mostly online	5%	5%	8%	9%	<1%	<1%
Usually top up up to £5	23%	23%	36%	19%	29%	21%
Usually top up £5.01-£10	22%	22%	22%	19%	25%	24%
Usually top up £10.01-£20	32%	32%	34%	34%	28%	33%
Usually top up more than £20	23%	23%	7%	27%	18%	22%

Source: OYST8b / OYST11b / TOPUP2
Base: all Oyster users (Oyster PAYG and / or Oyster Period, excluding Freedom Pass and Staff Pass users)

Sample profiles

	All Oyster users	Oyster PAYG users	Oyster Period users	Registered Oyster users	Unregistered Oyster users	Unregistered but likely to
Use buses ever	91%	90%	97%	93%	88%	95%
Use buses 5+ days / week	37%	33%	60%	38%	34%	37%
Use buses 1-4 days / week	35%	36%	28%	38%	32%	44%
Use buses less often	19%	22%	7%	16%	22%	15%
Don't use buses	9%	10%	3%	7%	12%	5%
Use tubes ever	92%	92%	94%	95%	88%	98%
Use tubes 5+ days / week	24%	18%	55%	30%	15%	22%
Use tubes 1-4 days / week	39%	42%	26%	42%	35%	38%
Use tubes less often	29%	32%	14%	23%	37%	39%
Don't use tubes	8%	8%	6%	5%	12%	2%
Use trains ever	69%	69%	69%	71%	68%	70%
Use trains 5+ days / week	13%	11%	24%	15%	10%	13%
Use trains 1-4 days / week	14%	19%	20%	18%	20%	20%
Use trains less often	37%	40%	26%	37%	39%	36%
Don't use trains	31%	31%	31%	29%	32%	30%

Source: QFREQBUS / QFREQTUBE / QFREQTRAIN
Base: all Oyster users (Oyster PAYG and / or Oyster Period, excluding Freedom Pass and Staff Pass users)
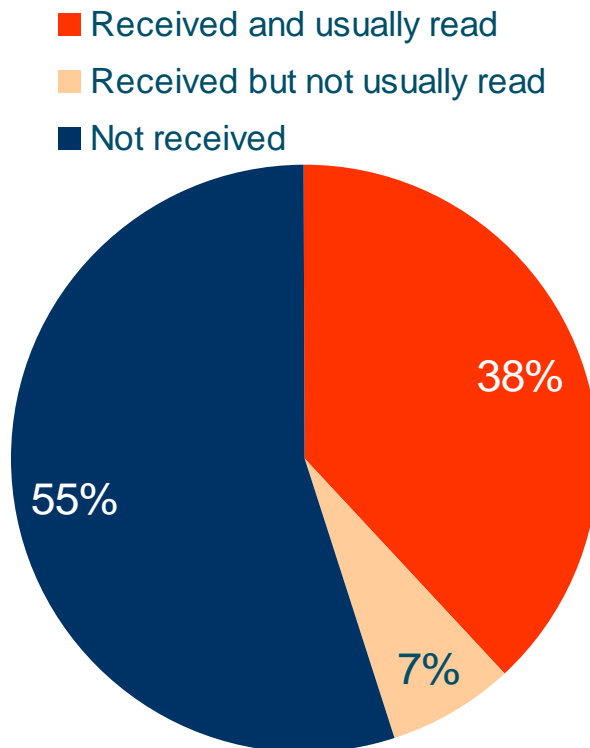
Appendix 2

Additional / Supporting data.

Nine out of ten Oyster customers have an email address, and many half of these have a work and personal email address.
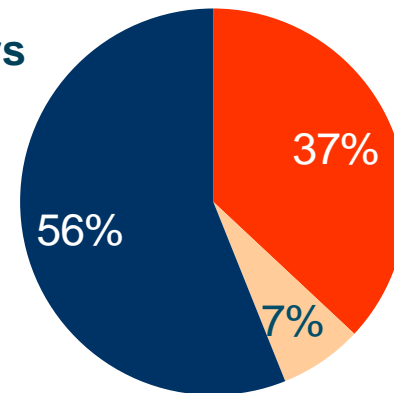

Legend:
- All Oyster users (red)
- PAYG users (yellow)
- Period users (orange)

Any email address
- 90%
- 89%
- 92%

Personal / home email
- 85%
- 84%
- 89%

Work email address
- 49%
- 47%
- 59%

No email address
- 6%
- 6%
- 5%

No internet access
- 4%
- 5%
- 2%

10% of those with an email address have changed (an) email address in the past year
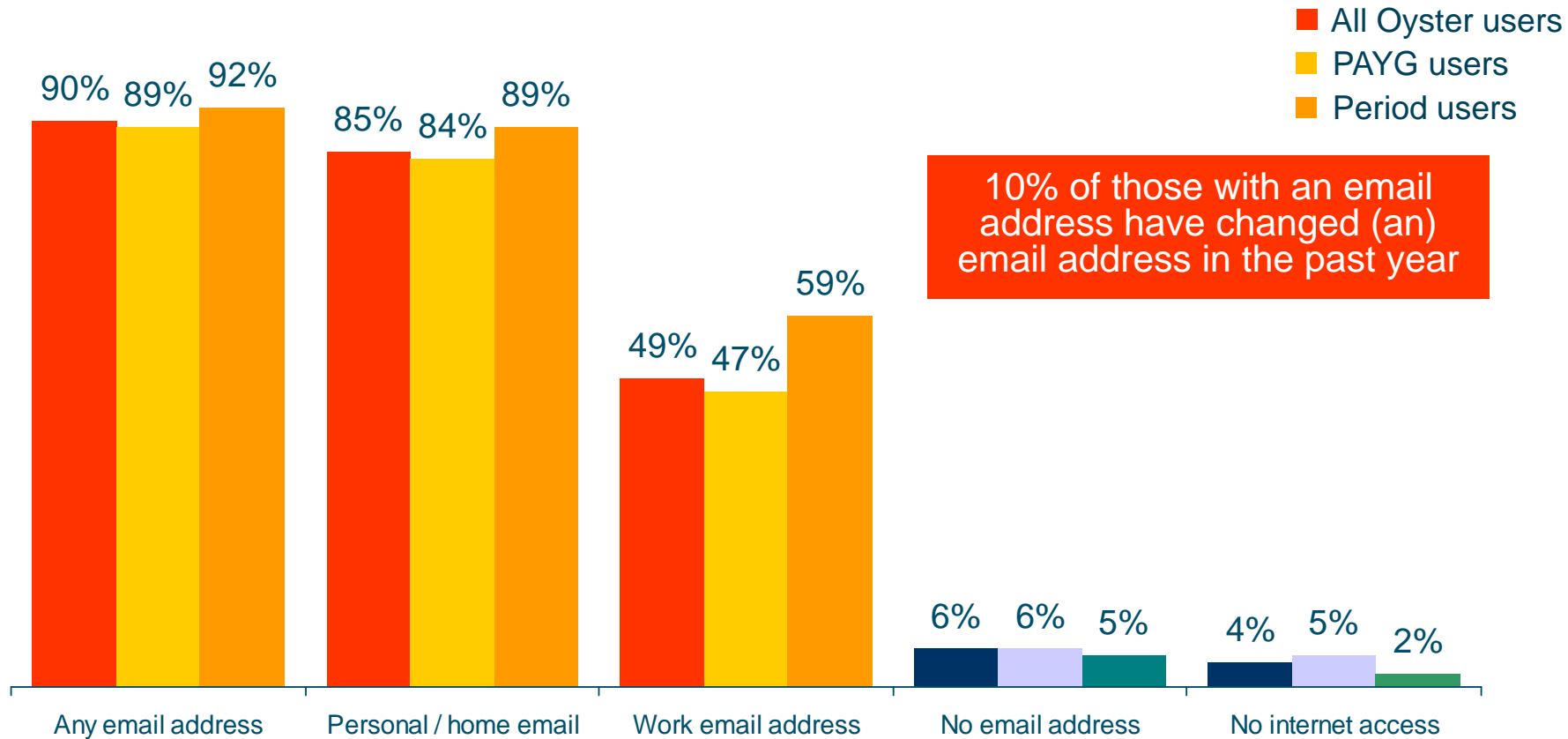
Source: EMAIL1 - Do you have any email addresses that you use regularly?
Base: all with Oyster PAYG or period (n=526) / all with Oyster PAYG (n=453) / all with Oyster Period (n=98)

More than four in ten Oyster customers with an email address claim to receive emails from TfL. Most read these emails.
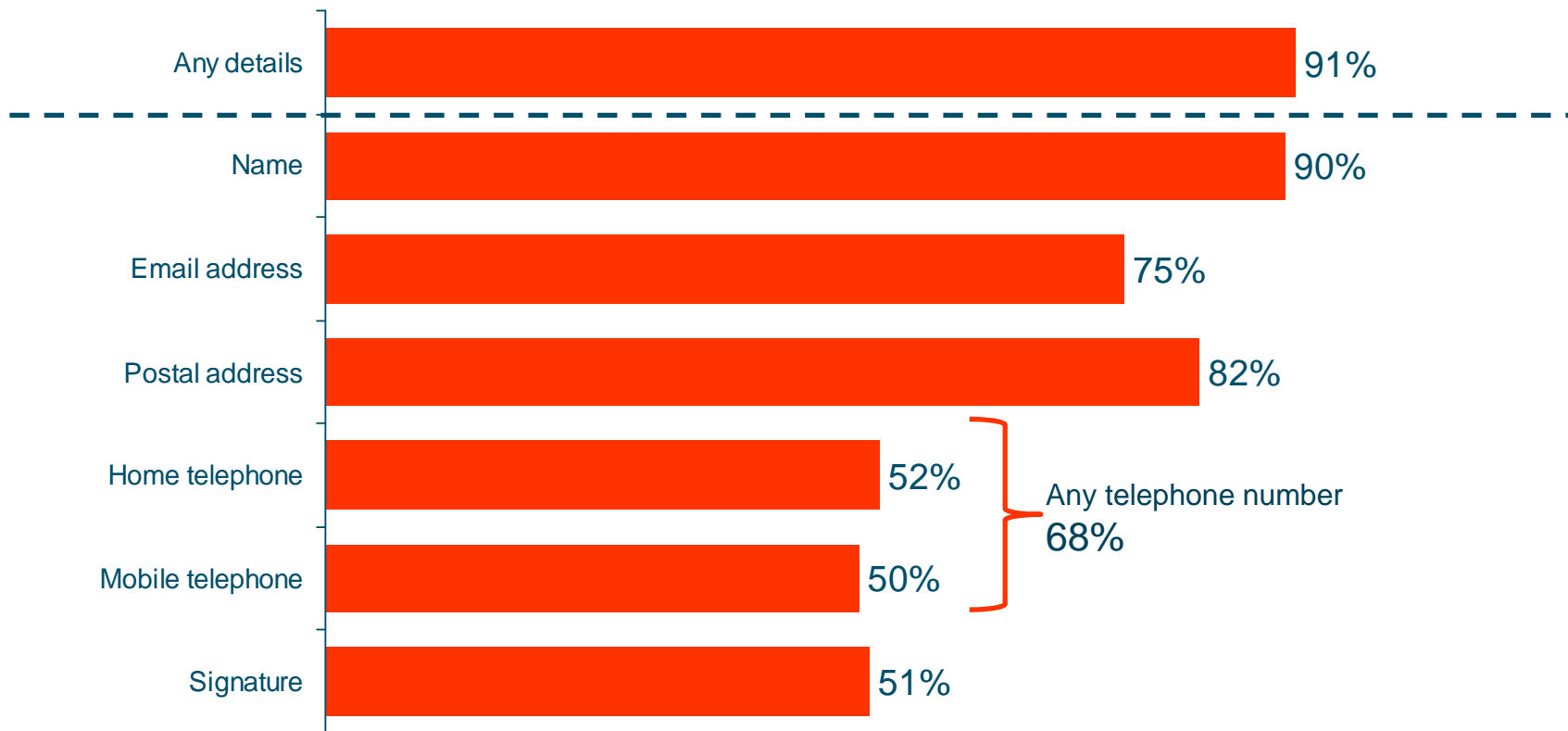
All Oyster users
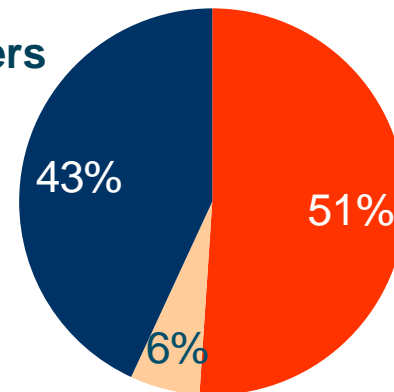
- ■ Received and usually read
- ■ Received but not usually read
- ■ Not received

38%

7%

55%

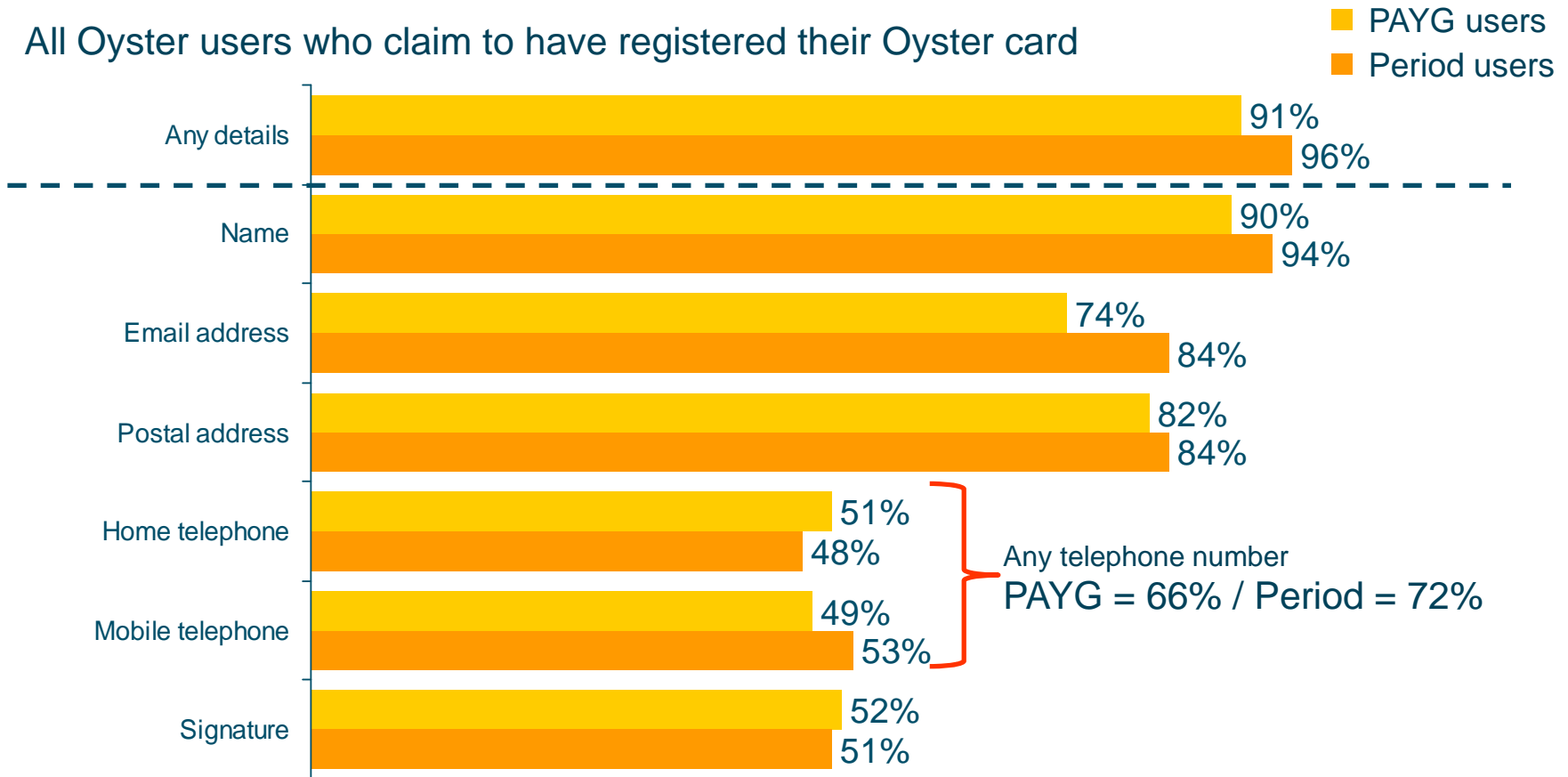## PAYG users

37%

7%

56%

Period users

51%

6%

43%

Three quarters of those who claim to be registered claim to have provided an email address.

All Oyster users who claim to have registered their Oyster card

Category	Percentage
Any details	91%
Name	90%
Email address	75%
Postal address	82%
Home telephone	52%
Mobile telephone	50%
Signature	51%

Any telephone number 68%

Three quarters of those who claim to be registered claim to have provided an email address.

All Oyster users who claim to have registered their Oyster card

■ PAYG users
■ Period users

Detail	PAYG users	Period users
Any details	91%	96%
Name	90%	94%
Email address	74%	84%
Postal address	82%	84%
Home telephone	51%	48%
Mobile telephone	49%	53%
Signature	52%	51%

Any telephone number
PAYG = 66% / Period = 72%

Source: REG9a - Do you remember how you registered your Oyster card?
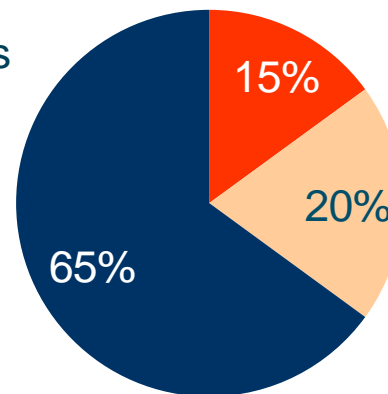*Base: all Oyster PAYG users who have claimed to have registered their Oyster card (unprompted) (n=227) / all Oyster PAYG users who have claimed to have registered their Oyster card (unprompted) (n=62)*

Around one third of Oyster customers have permanently lost their card or had it stolen. Less than half claimed a refund / renewal.
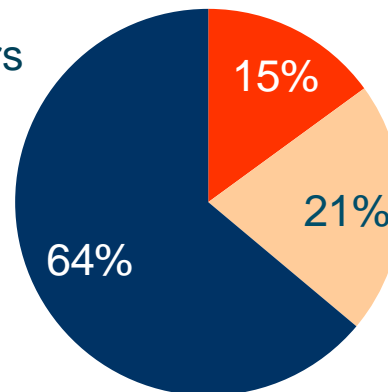
All Oyster users

- ■ Lost / stolen and got refund
- ■ Lost / stolen but no refund
- ■ Not lost / stolen

15%

20%

65%

PAYG users

15%

20%

65%

Period users

15%

21%

64%