

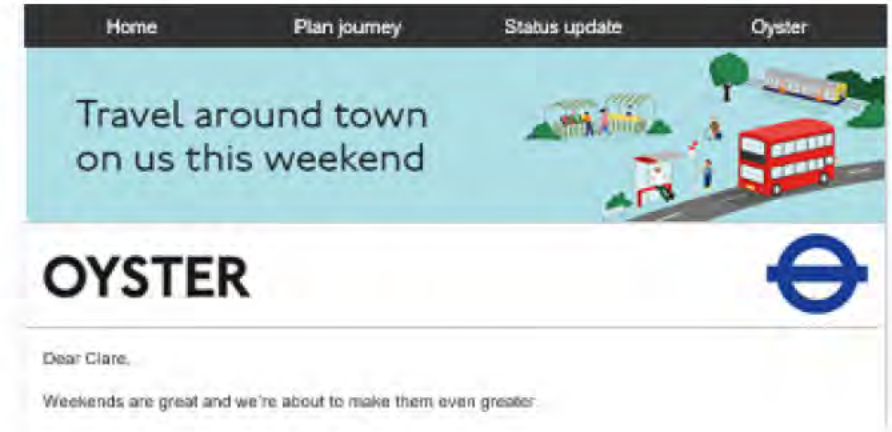
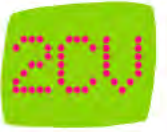
Revenue Generation Projects

Research debrief

July 2018

Background

- TfL is taking a holistic approach to achieving the mode shift goals of the MTS whilst also generating revenue by drawing on the 'Four Es' – Encouragement, Education, Enforcement and Environment
- As part of Encouragement, TfL is running two separate trials to incentivise mode shift away from car towards more sustainable modes – walking, cycling and, in particular, public transport (PT)
- TfL has collected customer travel data alongside the primary research and is conducting analysis of this data separately



Objectives



Weekend Win Back (WWB)

Welcome to London (W2L)

Business
question

Whether and how the Weekend Win Back incentive trial scheme has played a role in mode choice and in changing customer behaviour away from car to public transport?

Within this, what was the behaviour change process that incentivised customers?

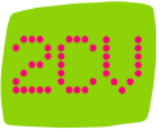
How can communications (including the Welcome to London pack) encourage new Londoners to establish desired behaviours

Research
question

To understand customer experiences of Weekend Win Back and explore what role the scheme has played in encouraging customers to replace existing or potential car trips with public transport.

Understand how effective the Welcome to London pack has been in encouraging Oyster card take up and public transport usage

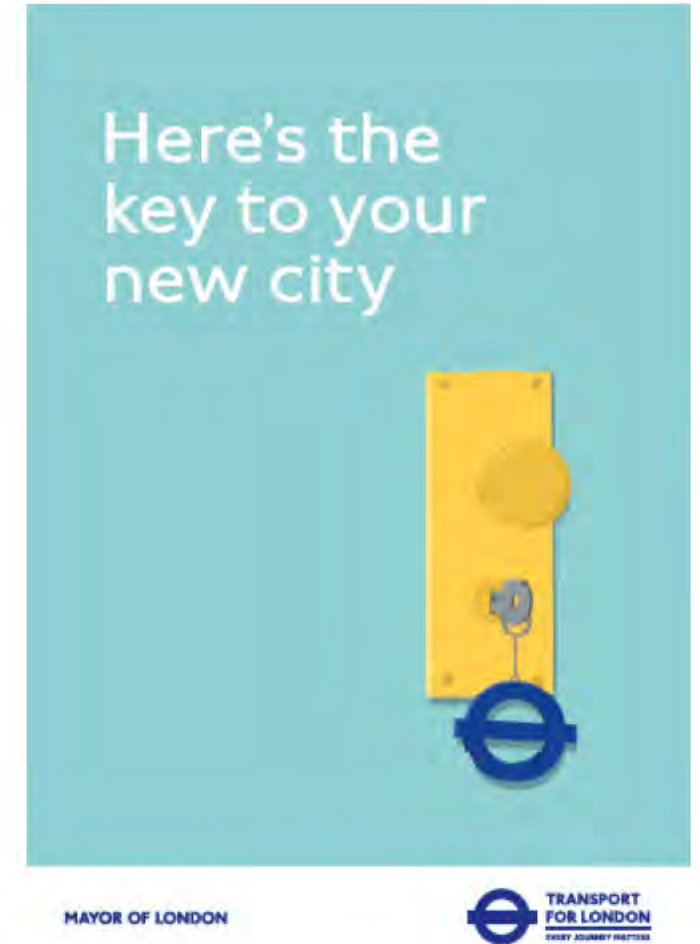
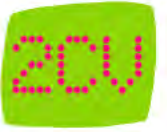
Headlines – Weekend Win Back

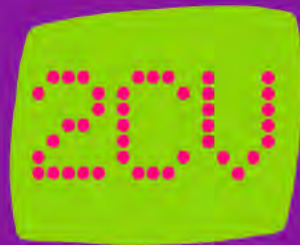


- WWB successfully triggered weekend journeys by public transport among ‘considerers’ – people open to the prospect of leaving their car at home for weekend trips
 - However, weekend travel behaviours are influenced by multiple factors – family and individual routines, time pressures, awkward journeys, multiple drop-offs – and taking public transport does not always feel as if it makes sense
 - The target are generally very aware of their public transport options and feel they are making a rational, measured decision to drive
 - They also tend to be living in areas where the environment is car-friendly (Zone 4+)
- WWB led to more sustained change in cases where customers felt that they had discovered a new travel option that suited them and that matched the appeal of driving – for example, involving a pleasant walk to the bus
- Customers were generally satisfied with the communication they received although felt that the benefits they actually experienced could have been promoted more loudly – not just the free aspect
 - More personalisation of the refunds process was also expected and would have helped reassure customers that they would be reimbursed
- Greater transparency around TfL’s motivations for this kind of initiative could be a useful way of raising the salience of the issues that the MTS aims to tackle – air pollution and congestion – and help bring people on board with the arguments
- Future initiatives should also dial up the positive experiences of switching and highlight exactly what people ‘win back’ (visit to family, trip into town, parking-free travel)

Headlines – Welcome to London

- Although they did not achieve their primary marketing objective, the W2L letters provided a warm welcome to Londoners
- Newcomers to London typically already own Oyster cards before they are registered in their new home
 - They have often visited friends, family and the city before
 - As a result, their information needs are more evolved and specific
- While a nice welcome, W2L does not provide much in the way of useful, usable or new information to recipients
 - Customer needs as newcomers are for more localised information, fares and journey planning tools
- The offer of an incentive was well received by all – felt like an unexpected, but not incongruous act – it made sense for TfL to be sending this to them
 - This improved the perception and reputation of TfL
 - It can act as a prompt to registration for those who have an Oyster card already but haven't registered





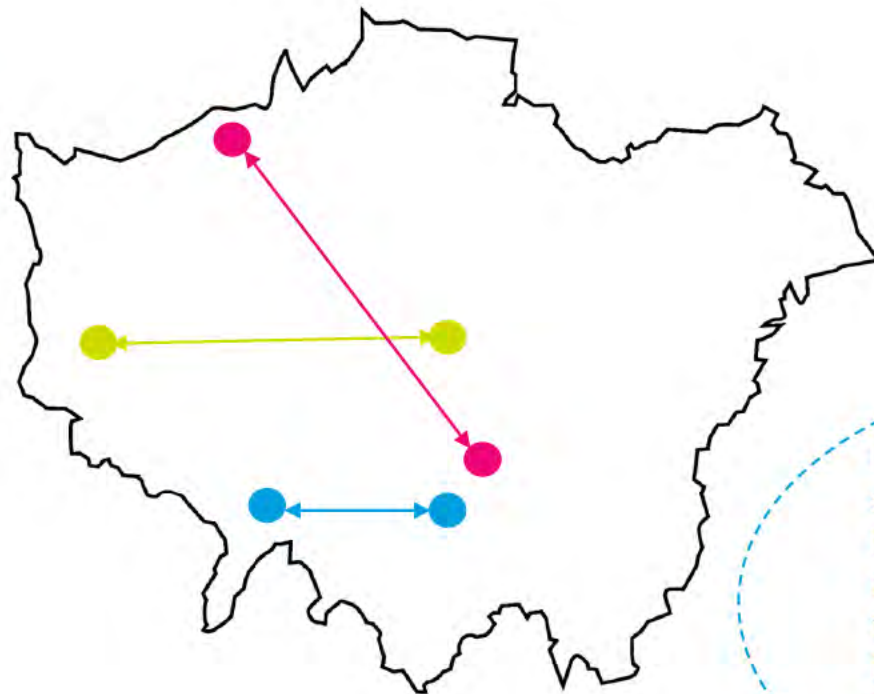
Weekend Win Back

WWB triggered weekend journeys by public transport among people already warm and open to the idea of not always using car



Kabir in Stanmore took public transport to visit his parents in South Norwood where he grew up, a journey he would usually do by car once or twice a month but was familiar with by public transport since London was his home town

Katy in Northfields went into town with her family and mother who was visiting. They went to dinner and a gig where the adults had a few drinks. She knows the route well but rarely takes it on weekends. They nearly missed last tube forgetting it was Sunday!



Brian in Tooting went to see his son who lives in Teddington. Brian is new to Tooting and has never taken public transport from there to see his son before. His instinct has always been to drive but taking the bus and train was a totally new discovery and worked!

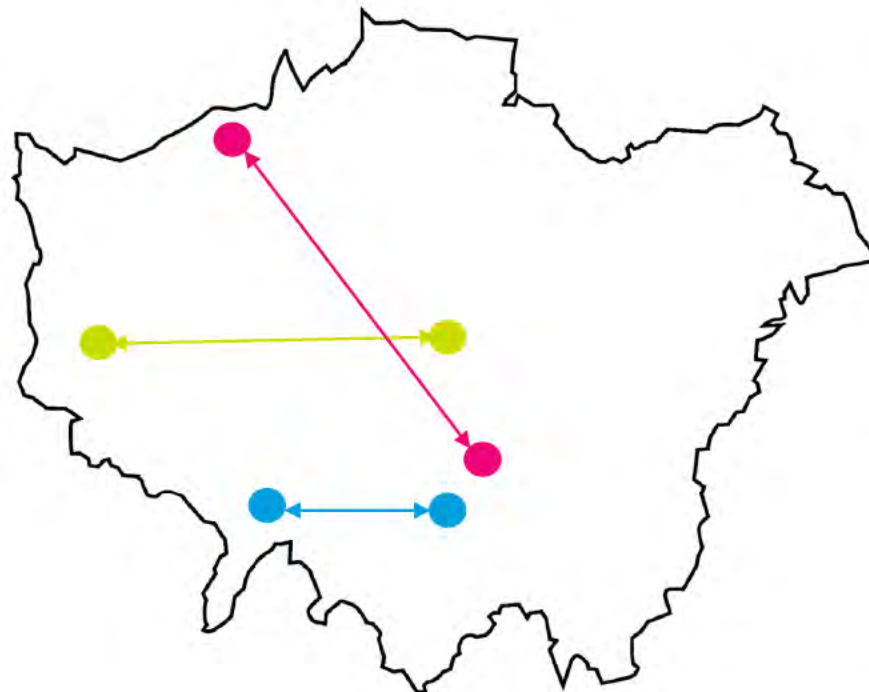
Motivations for travel were mixed – some made a fresh, impromptu journey while others replaced an existing, planned one that they would otherwise have made by car (genuine switchers)

WWB prompted future weekend trips by public transport when customers felt they had discovered a suitable and appealing new travel option



Customers replacing a familiar journey were less likely to keep using public transport instead of car at weekends (at least not any more so than previously)

The appeal and habit of taking the car was still strong



Customers who had discovered a new route by public transport that they had little experience of taking before reported more sustained behaviour change following the trial

These customers also expressed their intention to keep using public transport at weekends as it offered a good travel option for them

The experience of weekend PT was not sufficient to encourage future use, unless combined with low awareness of available PT options (not applicable to most of this target who use PT regularly)

WWB failed to prompt a shift away from car when the benefit of public transport over car was unclear or did not 'make sense' to customers – for example when 'life happens'



"If you want to get people around here out of their cars, abolish football practice!"
WWB participant, North West London



Louis = 2.30 football - Bushey Green

James = 2pm footy - Mill Hill park

Harry = piano 4pm - Elstree



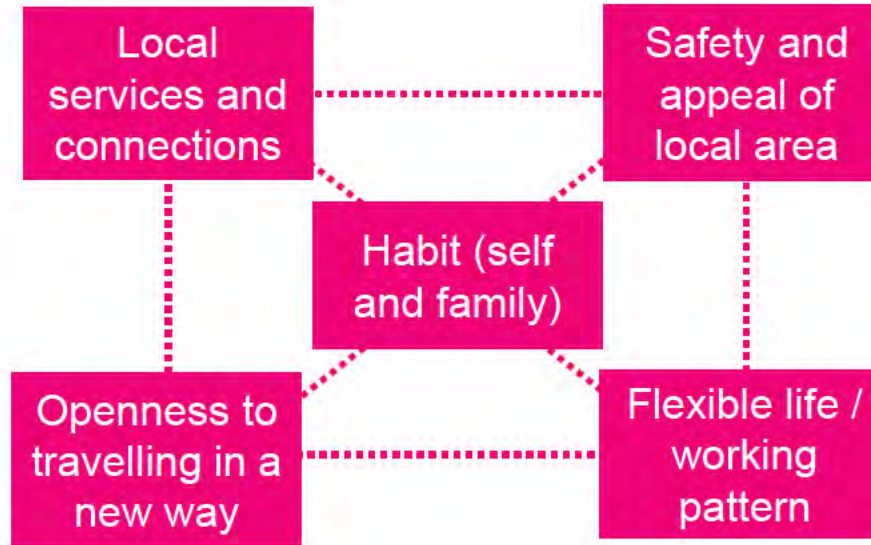
"Mum called and said she was feeling ill – she only lives half an hour away by car – so I rushed over and drove her to the hospital"
WWB participant, North London

Public transport does not always feel like a genuine option that allows people to live and make the most of weekend life eg multiple drop-offs, flexibility to drop in on older relatives in need

The impact of WWB on travel behaviours depended on a web of personal and environmental factors, not least local connectivity



"Piccadilly on the weekend is just awful. Packed with people from Heathrow, bags etc. you'll never get a seat on Saturdays. And the trains stop for ages before Acton Town, sometimes it's worth driving to Acton and parking the car there just to be moving."
WWB participant, West London



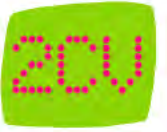
"I really enjoy walking around my local area Tooting, it's a very pleasant walk to the bus stop so I don't mind, and it's not too far."
WWB participant, South London

"I was going to use the offer but then I was going to collect my daughter from swimming, it was late, hair was wet and we just wanted to get home, eat and bed."
WWB participant, West London

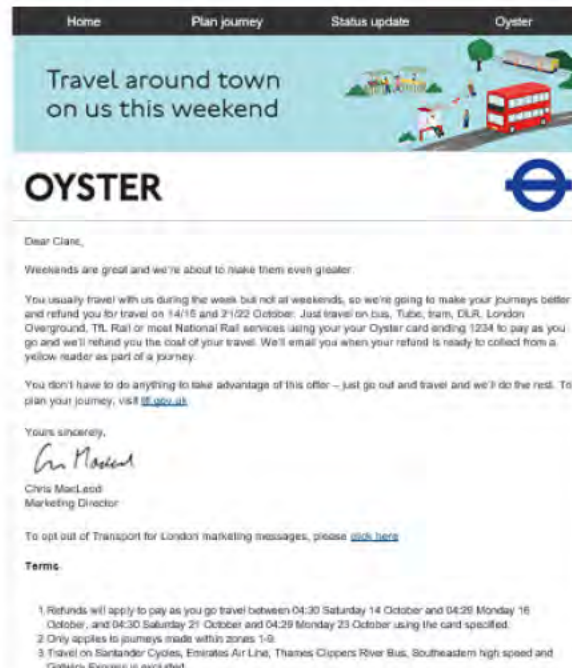
"Crouch End is a black hole! There's no way I'd take the bus to Finsbury Park and then tube – all that waiting for the bus to come and then it'll take an age just to get to the station. Why, when I can just get in the car and drive wherever I want?"
WWB participant, North London

For individuals to change or consider changing such a habitual and in-grained behaviour as driving at the weekend, more than one of these factors needs to exist

Email communication was simple and easy to understand, but more could be done to promote the benefits of the offer beyond money-saving



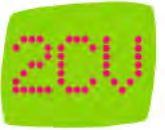
- **Clear and concise text** – relatively short and to-the-point compared to TfL update emails
- **Noticeably distinct** from the standard TfL update
- **Reminder email** – successfully prompted two people who had forgotten to take advantage of the offer on the second weekend



- **No mention of benefits** beyond cost-saving eg sustainable travel, perks of not having a car
 - *Forefront in customers' minds were: no traffic or parking stress, a pleasant walk to the bus stop, freedom drink*
- **Misplaced promise** - 'make your journeys better' doesn't make sense to people as the offer does nothing to improve service
- **No positive, directive message** – 'you don't have to do anything' = a lost opportunity to provide a call to action and actively engage people in the specific behaviour change

For lasting impact, communications need to be bolder and spotlight the advantages of taking public transport instead of car at weekends since free travel was not a powerful enough hook to drive change

Transparency in TfL's motivations for the offer could help raise the salience of the issues and give customers more of a social and personal justification to change (avoiding confusion and reputational damage)



"Why are they doing this? Is it a green thing? Or just a waste of revenue? If it's about the environment, say that. I'm a vaguely responsible parent of three sons; if you make me feel responsible I might listen"

WWB participant,
North West London

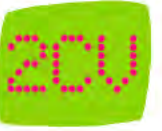


| | | |
|--------------------|---|---|
| Central | Minor delays | > |
| Circle | Suspended | > |
| District | Part suspended Severe delays | > |
| Hammersmith & City | Severe delays | > |
| London Overground | Part suspended Severe delays Minor delays | > |
| Metropolitan | Severe delays | > |
| TfL Rail | Part suspended | > |

"I thought 'oh that's nice' they're giving something back like compensation for all those times when things go wrong or you're just uncomfortable."
WWB participant, West London

As a piece of communication from TfL read by this target audience (Outer London customers who drive), the email is an opportunity to sell the arguments of the MTS – take them with you

The refund process caused confusion and left trial participants unsure of whether they had been refunded or not (although in most cases they had)



"The email said they'll contact you but I didn't get anything."
WWB participant, West London



"I always check my account online and I saw a sudden spike and thought that must be the refund."
WWB participant, North West London

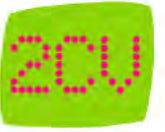
"I remember reading that they would send you an email but I hadn't seen it so I called customer service and the lady explained it would credit my account in a few days. I waited and it did so that was fine."
WWB participant, North West London



"To be honest I had forgotten all about it and then I tapped one day and my balance was more than I expected... I thought 'that must be it!' Nice surprise."
WWB participant, West London

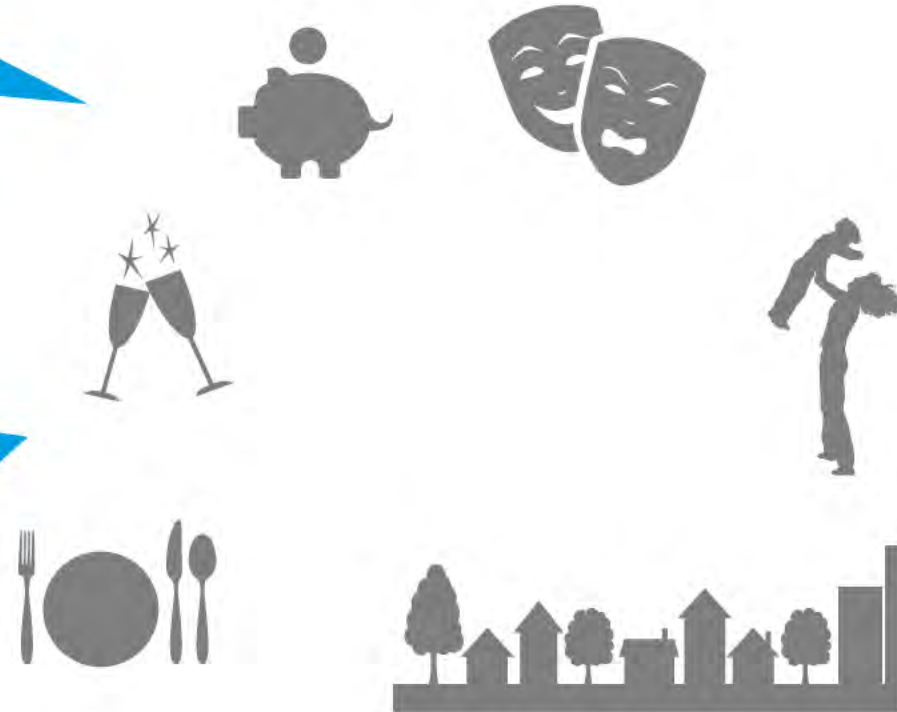
Overall, the refund process and communication lacked the level of personalisation that customers anticipated from the original email and expected to receive from TfL

Free travel was welcomed as a 'nice surprise' and triggered one-off trips by PT but alone it will not prompt sustained switching – need to see and feel the advantage vs car



"It's good to get something for free, obviously. It made me think 'Why not?'"
WWB participant, West London

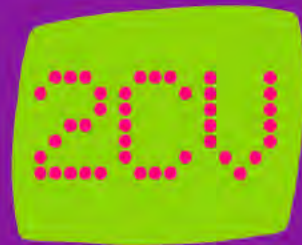
"Sometimes it's just nice to do something different. Go into town and see a show, drink, not be tied to parking times or traffic, you know. We had a fun night (except for nearly missing the last tube!!)"
WWB participant, West London



"It was good to go and see mum and dad, surprise them. I know they appreciated it and I probably wouldn't have been for another few weeks otherwise."
WWB participant, North West London

"It's been brilliant. I've started walking more around Tooting and getting to know the area."
WWB participant, South London

Future initiatives should make more of customer benefits – what people genuinely 'win back' eg spontaneous visit to see friends or family, a fun trip into town, stress-free travel, reconnection with area



Welcome to London review

Recipients liked the W2L letter – it made them feel welcome



"I was really surprised to receive it. When you're in a new place and someone says 'Welcome! I am here to help'. It makes you feel at home. I took a picture of the leaflet and sent it to my sister and said 'Look! I am a Londoner.'"
Female, Bromley

"I remember thinking they know I'm new and that's nice. I've never gotten anything from TfL so I noticed it. On the envelope 'Welcome' they know me, I'm a person!" Male, Aldgate

"Mayor's message was nice personal touch. The head of the city is caring and it's in keeping with his message about freezing prices."
Female, Redbridge

Welcome to London



MAYOR OF LONDON



TRANSPORT
FOR LONDON
EVERY JOURNEY MATTERS



Here's the
key to your
new city



"I thought this was really cool – I was really happy to move to London and this made me feel like I'm finally here." Male, Finsbury Park

"Welcome pack was useful and a nice thing to receive, feels in keeping with TfL, it was inviting, it's the little psychological things that make a difference. And £10 off is nice too!"
Female, Brentford

Despite this positivity, the purpose of the letter – to encourage newcomers to get an Oyster - was irrelevant, most already had one

- Newcomers typically purchase an Oyster card or become comfortable in using Contactless long before registering at a new address
- Some had also registered their Oyster card temporarily to another address
- Some needed prompting to remember the Welcome to London letter

"People moving to London probably have to live somewhere first that isn't a registered address so getting this once you're registered is too late."
Female, Redbridge

"I use Oyster, I know it's old-fashioned, but feels safer than my bank card. Also, I know how much money I have on it. It's simple... I'd have bought and registered even if I hadn't received this."
Female, Redbridge

Deep spent three months using AirBnB when he first moved to London (Brockley, Hackney, Bow) so they got to know the network and payment pretty well before moving to St Pancras.

Juliana had already registered an Oyster card – she thought she had received the Welcome to London pack because of this

"Before I moved, my friends (in London) are the ones who told me to buy and register an Oyster. They told me where to get it. They said to me I can buy single journeys but that Oyster was better. It's convenient. You can top-up by app"
Female, Bromley

The W2L letter and £10 incentive provided a prompt to registering Oyster card for those that already had one

- Although many newcomers already owned an Oyster card, the letter and incentive often acted as a prompt or reminder to register
 - The W2L content could be more specific about benefits of registering
- Those who registered and claimed the incentive found the process quite frustrating (took too long, was confusing)

Unlock London with £10 travel on us

When you purchase and register an Oyster card for £5

After you've used your Oyster card on the network, head to tfl.gov.uk/welcome to register, making sure you enter your address exactly as it appears on the back of this leaflet.

We'll email you within 10 days of registering to tell you how to collect your £10 pay as you go credit.



"The letter told me about registering - before that I didn't know it was a thing. Registering is great. It's more secure, I can look at my journeys and track anything that looks odd. I also registered my bank card with TfL after this."

Female, Brentford

"It reminded me of the Auto Top Up which I set up. It didn't work on my old Oyster from my previous journeys so I had to get a new one"

Male, Roehampton

"After receiving the letter I registered my Oyster Card and claimed the incentive - it's great to get free money!"

Male, Finsbury Park

Recommendations for improving W2L



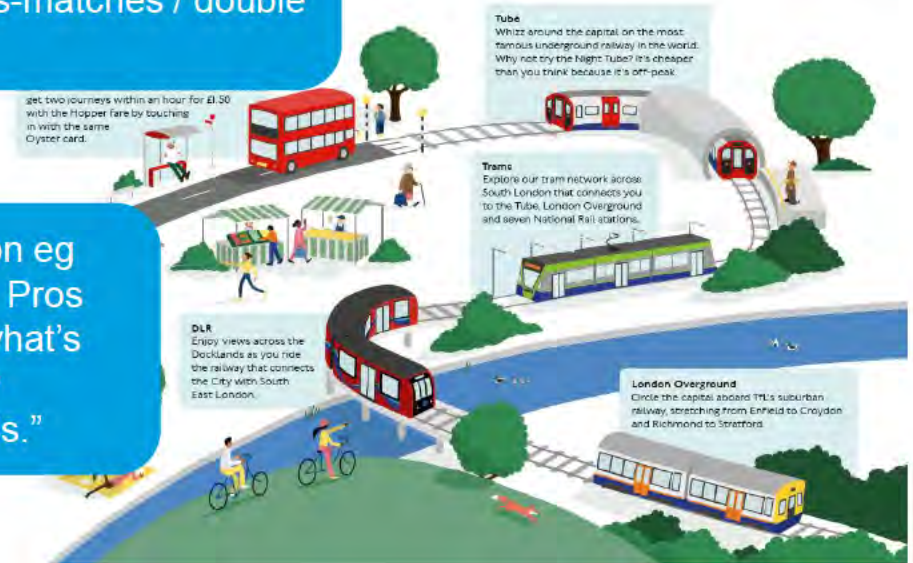
- ✓ Deliver information earlier – when people register at a new address, it's too late
- ✓ Provide information digitally when you first register online
- ✓ Streamline the process of claiming the incentive
- ✓ Help people figure out the cheapest way to travel – particularly when comparing public transport to car
 - Many newcomers fear that Public Transport will be very expensive in London

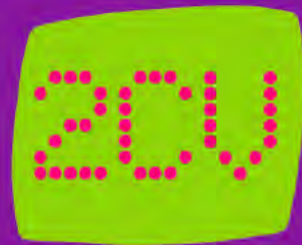
"I'd already established travel habits. By the time you receive this you already have to be travelling around London so it needs to be earlier, when you land, at the train station etc. Could they use your mobile network? Send you a text or link to this leaflet by email? 'Welcome! This is how you get to the city from the airport etc.' it would be more seamless."

"They could spell out the benefits of registering e.g. if you lose your car, you can get money back, you can pay for bikes, get refund on mis-matches / double taps etc."

"Could have given more information eg about payment options and fares. Pros and cons of PAYG vs travelcard, what's cost effective etc. If this is for new arrivals it should definitely have this."

"They should steer people to the website so you can find out about things like 'capping', 'payment options'. It would be good to make the 'Visit us online' message more prominent - spell out what information you can access online."





Newcomers attitudes to modes

For those who still use the car – convenience and comfort are key



- Quality of public transport network stands out for many new residents
- Lack of parking, congestion are off-putting to car ownership
- There were also logistical barriers – some had not yet received a UK licence, couldn't afford to buy a car, or had no available parking space

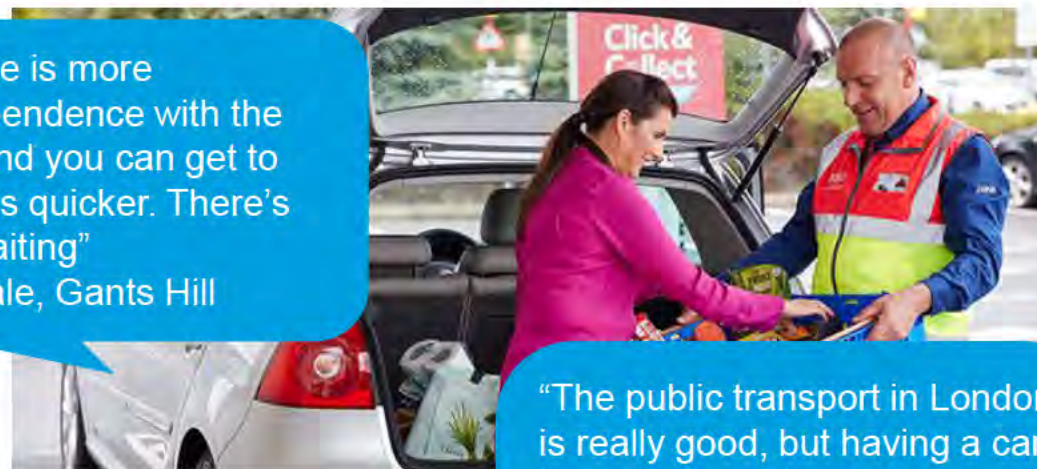
"I own a car and a bike – they're both at my parents house in Leighton Buzzard. I wouldn't bring a car down here because there's nowhere to park, but I'm considering bringing the bike"
Male, Finsbury Park

"I owned a car in South Africa. You need one there, but here – there's no need. And the idea of an individual sat in a car for an hour a day, travelling to work pumping out pollution is just insane"
Male, Roehampton

"Everything about London says 'Don't drive!' I know other cities are trying to do this too but they don't have the transport network like London. Here it's very easy to connect by public transport."

- The car offers much valued independence and helps newcomers explore the city and surrounding area
- Safety was a really important factor for some – who were nervous about walking to tube station

"There is more independence with the car and you can get to places quicker. There's no waiting"
Female, Gants Hill

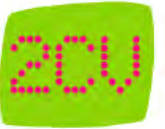


"When I think of driving I think of exploration! Getting to know a city."

"The public transport in London is really good, but having a car is easier for going to the supermarket or taking the kids to the doctors. I think we could get around London without a car. Off course. But the car is convenient."

Female, Bromley

Newcomers are impressed by public transport in London compared to other/home cities – but recognise the shortcomings



“Here I feel normal taking PT, allows you options. It’s for everyone – even people who drive everywhere if they need to go to the city people will take PT. Least stressful option, don’t have to think about road closures.”

“Before I moved here, I didn’t have the sense of scale of the PT in London. It is extensive”

“I love looking out of the window! You can go in any direction from Highbury and Islington.
Male, Finsbury Park

“I think the pink card readers are explained terribly.”
Male, Finsbury Park

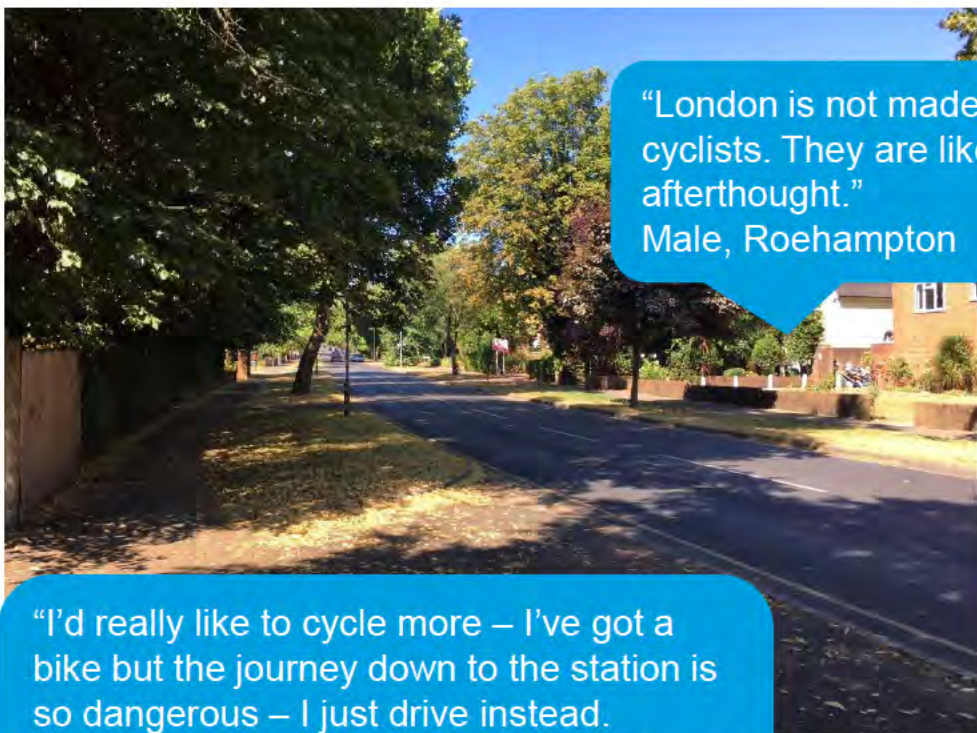
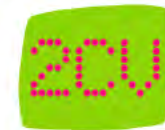
“I love the Overground, it’s very comfortable in Summer compared to Tube. You can get the internet – it’s just more enjoyable.”

“Tubes are so quick but can get hot. The night tube is convenient, but usually full of drunk people”

“The Hopper Fare is so helpful, it’s great value.”

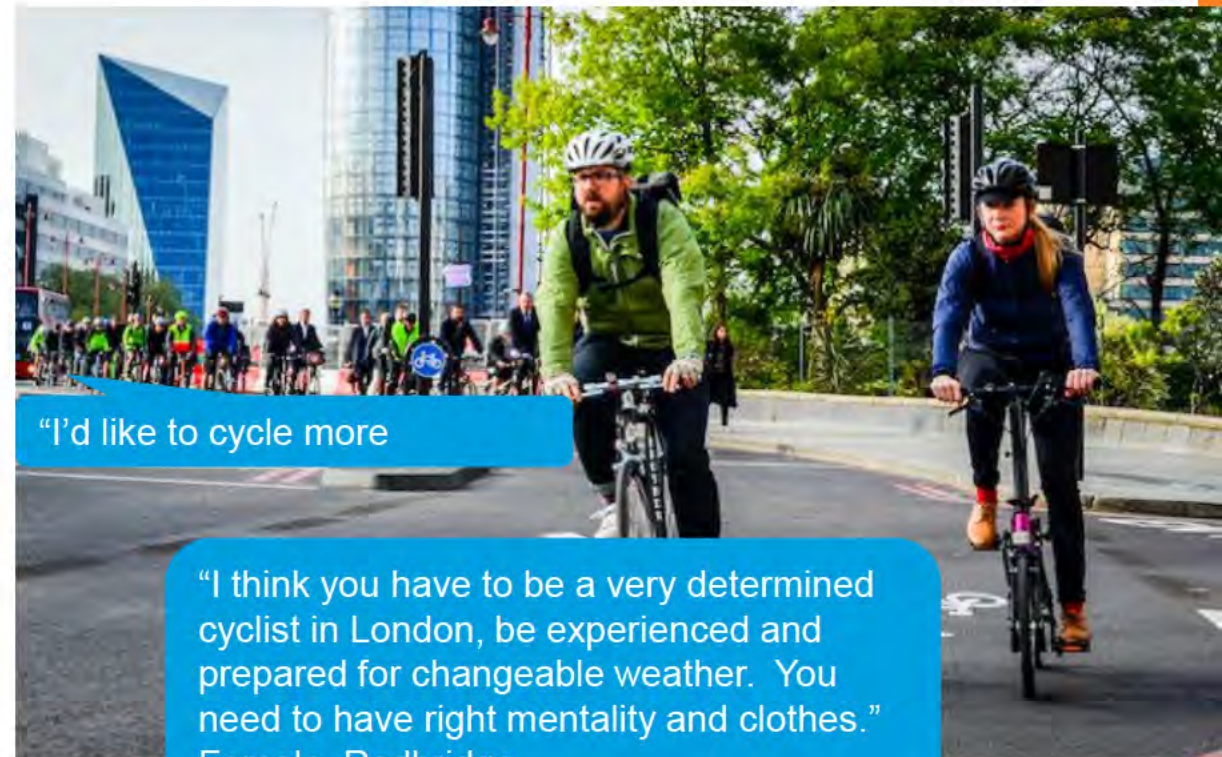


Many want to cycle more but feel the infrastructure and safety holds them back



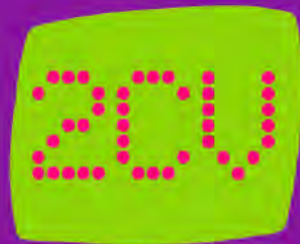
"London is not made for cyclists. They are like an afterthought."
Male, Roehampton

"I'd really like to cycle more – I've got a bike but the journey down to the station is so dangerous – I just drive instead. There's a really wide road – why don't they add cycle lanes"
Male, Sutton



"I'd like to cycle more"

"I think you have to be a very determined cyclist in London, be experienced and prepared for changeable weather. You need to have right mentality and clothes."
Female, Redbridge

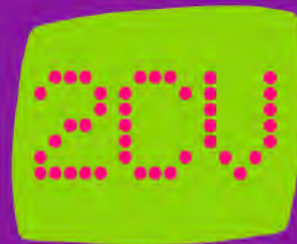


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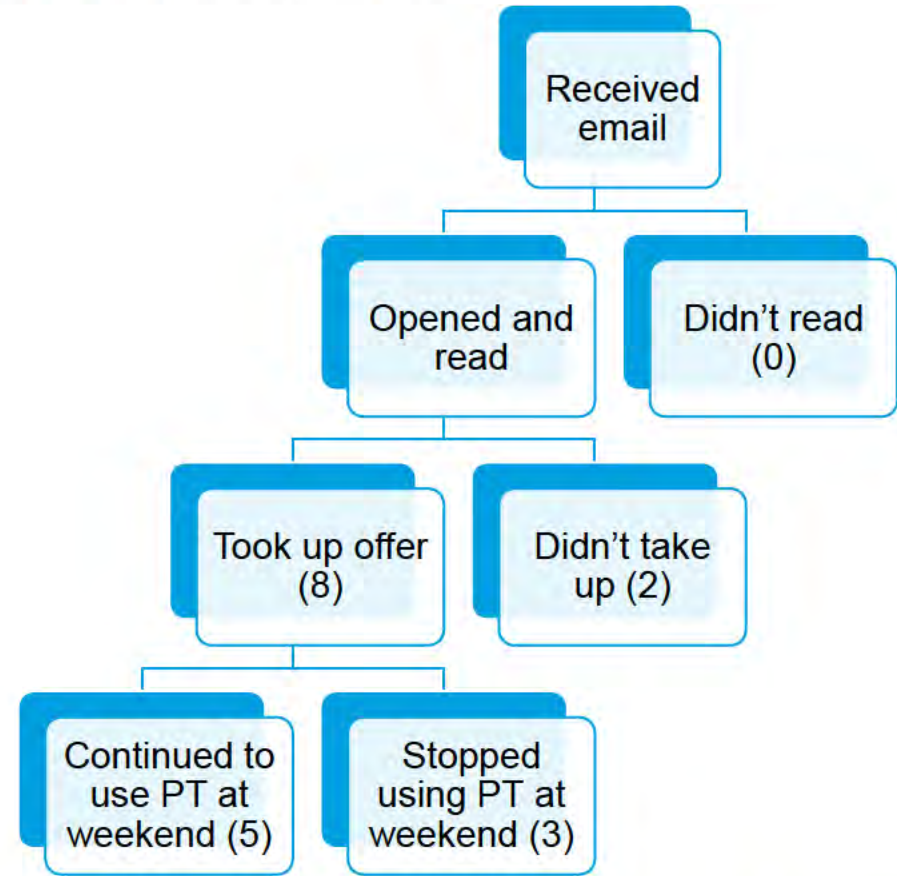
Appendix 1: Methodology

Who we spoke to – Weekend Win Back and Welcome to London

1 to 1.5 hour depth interviews with Weekend Win Back trial participants



- Recruited via TfL lists
- Living in Zone 4 and further out
- Frequent PT users during week, car on weekends



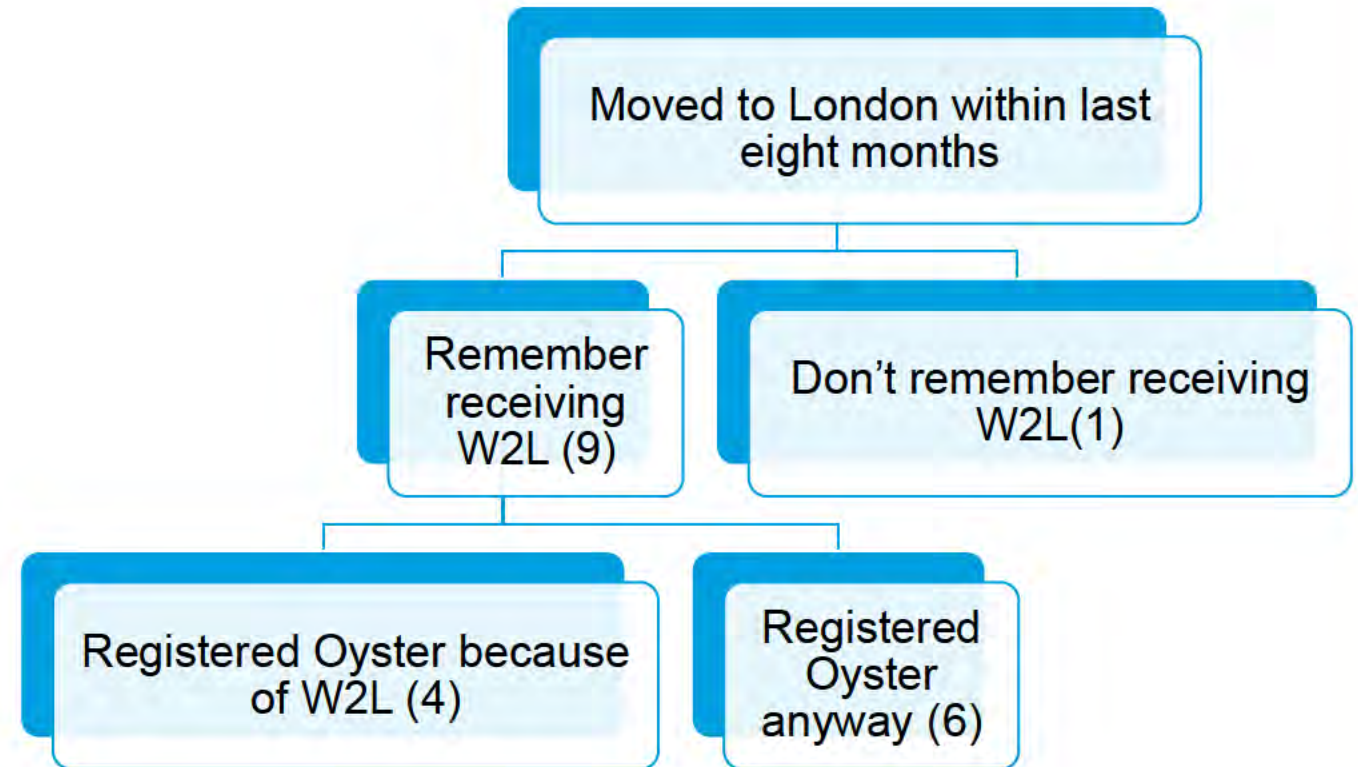
Our recruitment alone suggests limited uptake and engagement with the trial; we contacted 1,000 customers to secure 10 interviews

Who we spoke to – Welcome to London

1 to 1.5 hour depth interviews with those who had been sent the Welcome to London pack



- Recruited via TfL marketing lists
- Mix of locations across inner and outer London



Previous experience and habits

- Newcomers to London have a broad range of habits

"I was a bit afraid of the idea of public transport in London because it's a big city. When I first came to London I was really surprised. Sao Paolo's public transport is a mess. We had to have a car there. Public transport here made me surprised. It's really accessible for people. I can go on the bus with a push chair That would never happen in Sao Paolo. It's just easy"

Female, Redbridge

"Before I moved I thought PT in London was going to be complex. London's overcrowded and I knew that. I'd been to London before and used it so I was excited to get to know it"

Female, Gants Hill