

**Oyster Database Marketing  
Development**

**08070**

April 2009

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# Research Overview

# Context

- TfL currently sends a variety of targetted messages to registered Oyster card holders and other TfL customers who have supplied their email addresses.
- These messages are information focused, and the sending of these messages is controlled to ensure relevance and avoid over-mailing.
- A reasonable amount of circumstantial evidence suggests that these messages are well received. More widely, customer research frequently reveals a desire for, or at least an openness to, receiving more personalised / relevant travel-related information.
- Electronic communications with TfL customers is set to increase. Key TfL Marketing themes are to 'make the web the centre of our communications', and 'use the full range of mechanisms'.
- To date, no customer research has been undertaken specifically around this form of communication with TfL.

# Objectives

Two broad strategic questions are required to be answered:

- How can TfL improve their current electronic contact with the customers on the database?
- How can TfL further utilise the customer database and this form of electronic contact with customers in the future?

Specific research objectives and information requirements within this are:

- What is the awareness of receiving emails from TfL?
- How are the emails received?
- To what extent are the emails 'used' by customers?
- What are the attitudes to receiving emails from TfL?
- What other information sources are used?
- What other information could be delivered by TfL?
- How else could electronic information be delivered by TfL?

# Approach

Multi-phase qualitative and quantitative approach:

- Mini group discussions with a range of customer types:
  - 2x mini groups with recent combined email openers
  - 1x mini group with recent stand alone email openers
  - 2x mini groups with recent Oyster database registrants
- Quantitative interviews with a range of customer types:
  - 300 telephone interviews with recent email recipients (not necessarily openers)
  - 167 online interviews with recent stand alone email recipients
  - 240 online interviews with recent combined email recipients
  - 83 online interviews with recent Oyster registrants (first Oyster card only)
- Fieldwork conducted November 2008 (first stage qualitative) and January / February 2009 (second stage qualitative and quantitative).



# Overall summary

# Overall summary: current status

## The current email strategy is working well for customers

- Awareness is reasonable generally, and good for combined email recipients.
- The majority are positive about receiving email(s) from TfL:
  - Nine out of ten open(ed) them
  - Only 7% considered the emails irrelevant
  - Only 4% said they deleted the emails as soon as they were received
  - Only 2% consider that they receive too many emails from TfL
- The content of the emails is highly rated:
  - At least four fifths of those recalling the combined emails agreed that they were well designed, easy to understand, use the right tone, timely, relevant, sufficiently informative and helpful
  - Four fifths of those recalling the stand alone emails agreed they were easy to understand, use the right time, relevant and sufficiently informative.

# Overall summary: future potential

**There is clear permission to extend the controlled and targeted delivery of relevant travel information to customers**

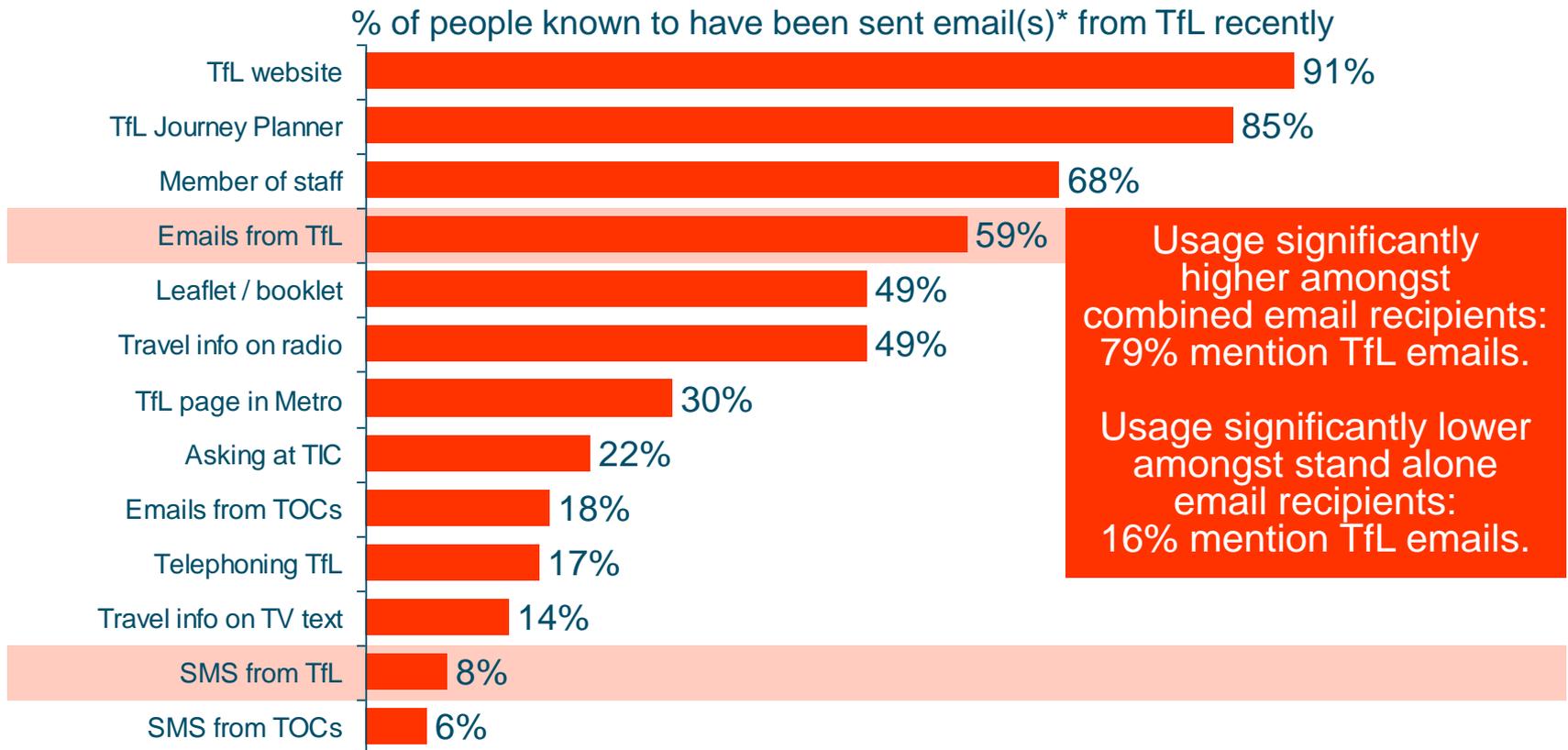
- When prompted, the majority of customers would be open to receiving a range of different information via email, provided...
  - it is considered relevant, to themselves and TfL's core business (travel)
  - the volume of emails is not too great (one a week maximum)
- The current style and tone is appropriate and should not be deviated from:
  - minimal content
  - short, informative tone
  - not obviously 'marketing-led' (i.e. clear, unfussy layout, minimal images)
  - combined email recipients are particularly resistant to change / expansion of format
- Customers are more open to different types of information (e.g. river services) when examples are seen. Subject titles can be made clearer and more engaging, but must never be misleading (e.g. 'Important information')



# Key findings

- Awareness of TfL emails
- Attitudes to receiving TfL emails

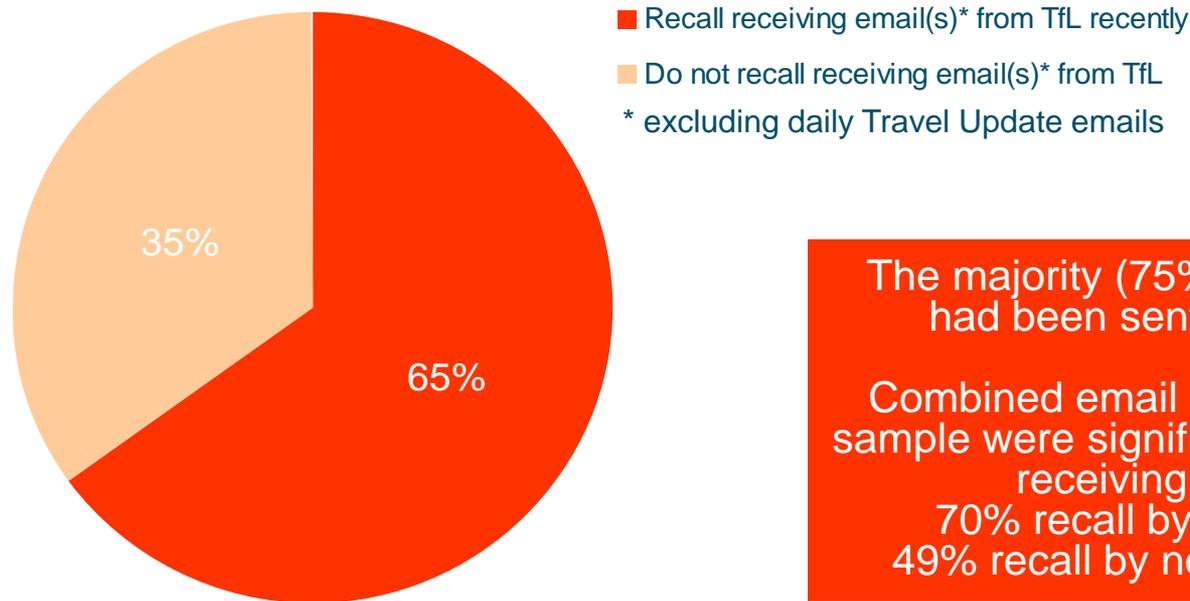
# Three fifths say they use email(s) from TfL as a source of information about transport services.



Source: Q6 - Which of the following do you use ever use for information about transport services  
 Base: all known to have been sent email(s) from TfL recently (File1 - CATI sample) (n=300) / stand alone email recipients (File2 - online sample) (n=167) / combined email recipients (File3 - online sample) (n=240)

# After prompting, two thirds of customers recall receiving email(s)\* from TfL recently. Combined email recipients have much higher awareness.

% of people known to have been sent email(s)\* from TfL recently



The majority (75%) of the general sample had been sent combined email(s)\*.

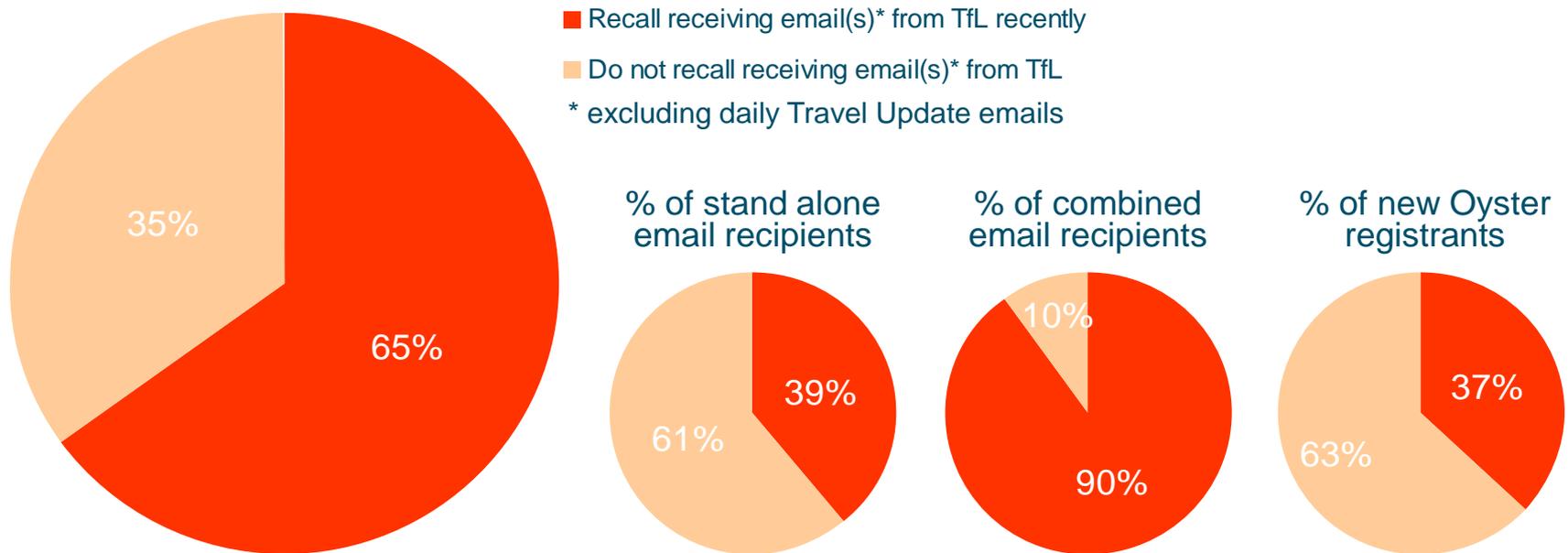
Combined email recipients in this general sample were significantly more likely to recall receiving emails from TfL:  
70% recall by combined recipients  
49% recall by non-combined recipients

Source: Q6, Q7, Q8, Q9, 10a, 10b

Base: all known to have been sent email(s) from TfL recently (File1 - CATI sample) (n=300)

# After prompting, two thirds of customers recall receiving email(s)\* from TfL recently. Combined email recipients have much higher awareness.

% of people known to have been sent email(s)\* from TfL recently



Source: Q6, Q7, Q8, Q9, 10a, 10b

Base: all known to have been sent email(s) from TfL recently (File1 - CATI sample) (n=300) / stand-alone email recipients (File2 - online sample) (n=167) / combined email recipients (File3 - online sample) (n=240) / new Oyster registrants (File4 - online sample) (n=83)

# Those recalling being sent emails are generally positive towards receiving them.

• Fine / OK	21%	General positive	44%
• It was good / great / good they sent it	16%		
• Happy / pleased	10%		
<hr/>			
• Found it useful / helpful	38%	Useful / relevant	44%
• Informative / provided me with information	7%		
• Relevant to me / routes I travel on / it affected me	2%		
<hr/>			
• Gave me information / warning about works / delays	21%	Specific information	24%
• Helped me plan journey / change travel arrangements	4%		
<hr/>			
• Lack of information / not specific enough	5%	Not relevant / helpful	7%
• Wasn't relevant to me / didn't affect routes I travel on	4%		
<hr/>			
• Didn't mind / not bothered / indifferent	6%	Other	
• Didn't read it / took no notice / deleted it	4%		
• Usually check website / prefer to look up myself	2%		
• Other	9%		
<hr/>			
• Nothing	9%		
• Don't know	2%		

Source: Q11a/b - How did you feel about receiving email(s) from TfL?  
 Base: all recalling receiving email(s) from TfL recently (File1 - CATI sample) (n=195)

# Combined email recipients are even more positive, and more likely to mention usefulness of emails.

	general	stand alone	combined
• Fine / OK	21%	23%	21%
• It was good / great / good they sent it	16%	8%	12%
• Happy / pleased	10%	10%	8%
<hr/>			
• Found it useful / helpful	38%	14%	35%
• Informative / provided me with information	7%	2%	1%
• Relevant to me / routes I travel on / it affected me	2%	15%	9%
<hr/>			
• Gave me information / warning about works / delays	21%	5%	20%
• Helped me plan journey / change travel arrangements	4%	-	10%
<hr/>			
• Lack of information / not specific enough	5%	-	-
• Wasn't relevant to me / didn't affect routes I travel on	4%	-	*
<hr/>			
• Didn't mind / not bothered / indifferent	6%	8%	5%
• Didn't read it / took no notice / deleted it	4%	6%	1%
• Usually check website / prefer to look up myself	2%	-	-
• Other	9%	12%	5%
<hr/>			
• Nothing	9%	-	<1%
• Don't know	2%	3%	1%

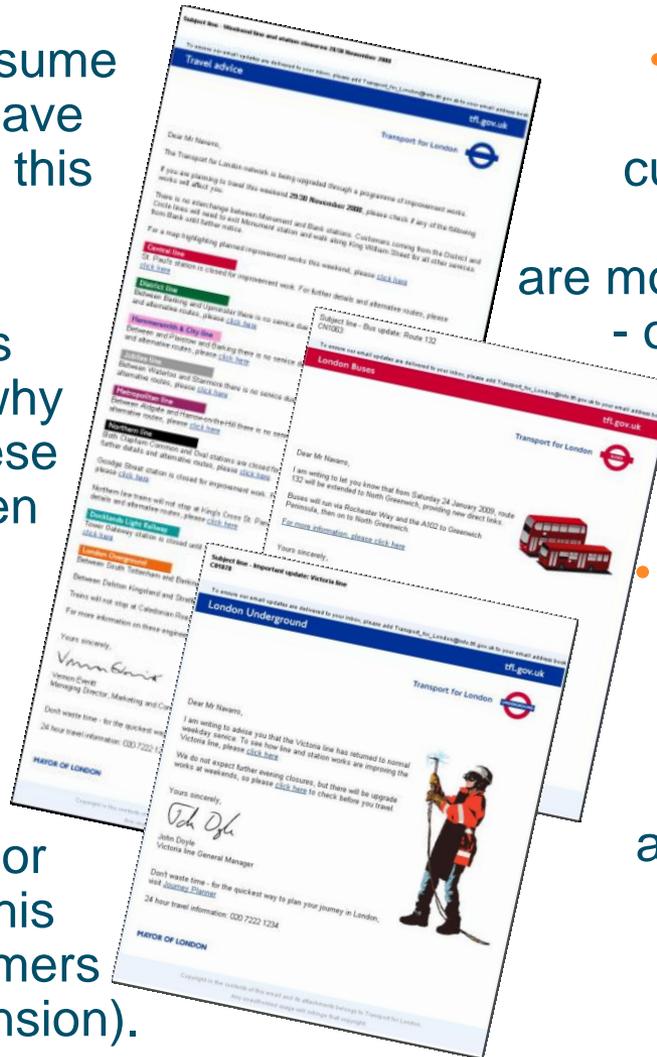
Source: Q11a/b - How did you feel about receiving email(s) from TfL?

Base: all recalling receiving email(s) from TfL recently (File1 - CATI sample) (n=195) /

stand-alone email recipients (File2 - online sample) (n=65) / combined email recipients (File3 - online sample) (n=215)

# Receipt of emails is rarely questioned by openers.

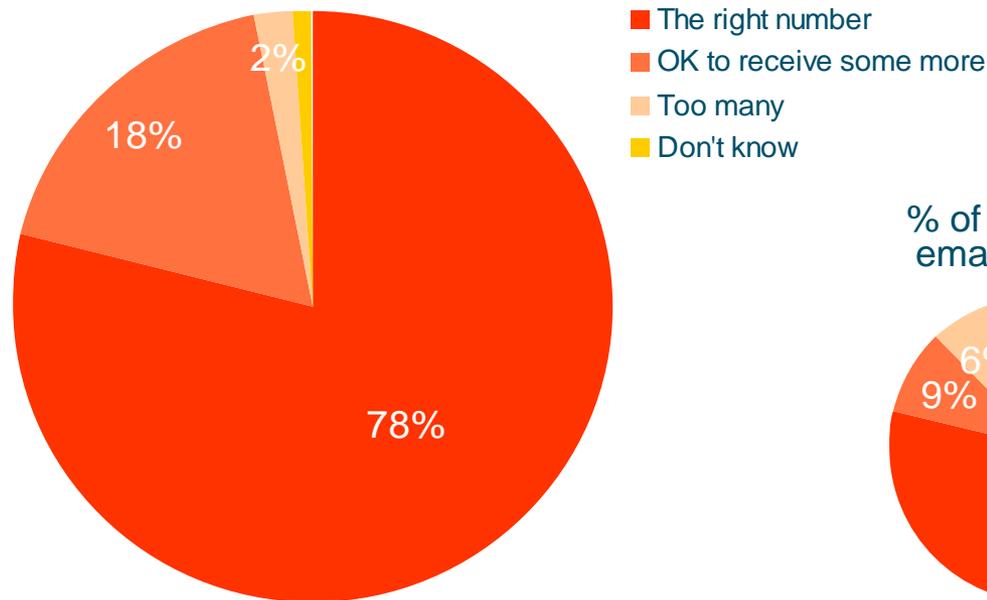
- Some customers assume - even claim - they have signed up to receive this email information.
- Little or no questions are asked of how / why they came to get these emails - largely driven by the unobtrusive style and relevant, informative content.
- Some customers go as far as to assume or expect TfL to send this information to customers (e.g. Vic. line suspension).



- These emails function at least to remind customers that things are going on, so that they are more likely to be prepared - or at least less surprised - if problems are encountered.
- The combined email is much more salient: it is regularly received, has a consistent style, and it is often awaited and regularly referred to.

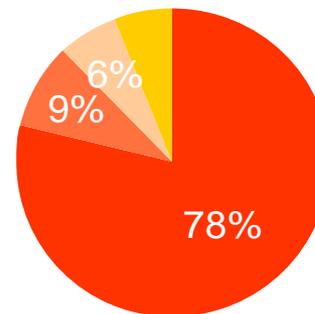
The great majority are happy with the frequency / volume of emails received. Only a minority consider that they receive too many from TfL.

% of people recalling receiving email(s) from TfL recently



Once a week is an acceptable - an effectively maximum - frequency for unsolicited email receipt. More frequency may only be acceptable if clearly relevant, e.g. a specific service update to a regular combined email opener.

% of stand alone email recipients



Source: Q16 - How did you feel about how many emails you receive from TfL?  
Base: all recalling receiving email(s) from TfL recently (File1 - CATI sample) (n=195) / stand-alone email recipients (File2 - online sample) (n=65)

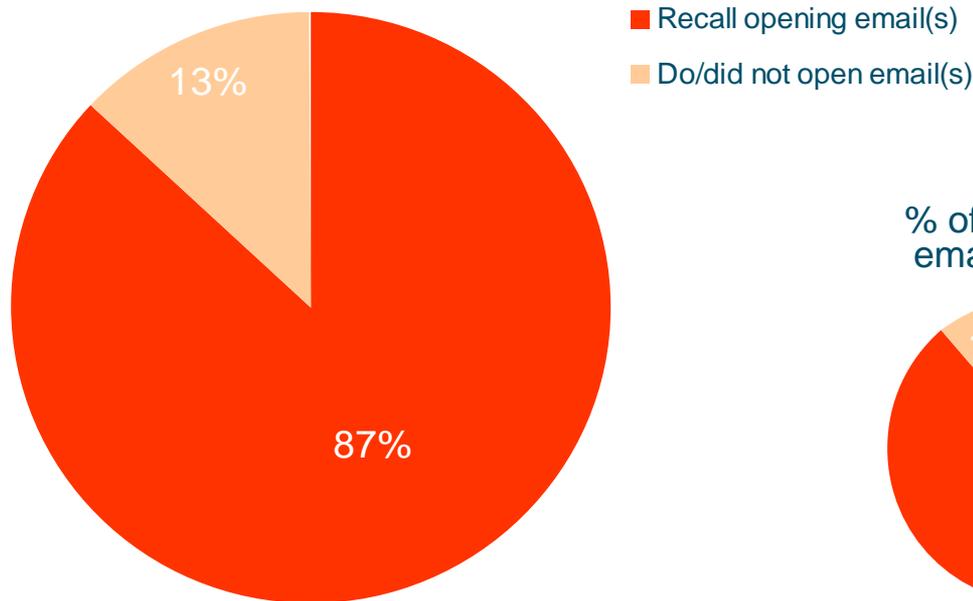


# Key Findings

- Opening TfL emails
- Evaluation of TfL emails

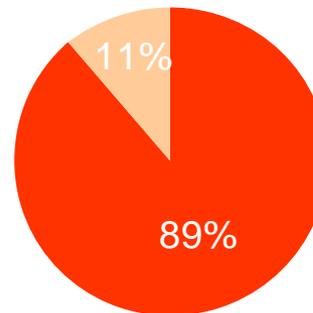
# The great majority of those who recall receiving emails do then open the emails. Combined email recipients are most likely to do so.

% of people recalling receiving email(s) from TfL recently

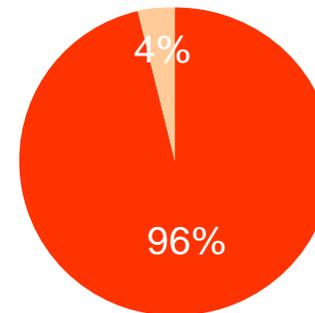


The few (n=11) that didn't open emails did not because: not intending to travel (5); not interested (4); too much irrelevant information (2)

% of stand alone email recipients



% of combined email recipients



62% 70%  
could read when opened (images not blocked)

Source: Q12a/b - Did you open this email / these emails from TfL? /  
 Q19 - Could you read the email(s) as soon as you opened it / them, or were parts of the message blocked?  
 Base: all recalling receiving email(s) from TfL recently (File1 - CATI sample) (n=195) /  
 stand-alone email recipients (File2 - online sample) (n=65) / combined email recipients (File3 - online sample) (n=215)

# Combined email recipients are even more positive, and more likely to mention usefulness of emails.

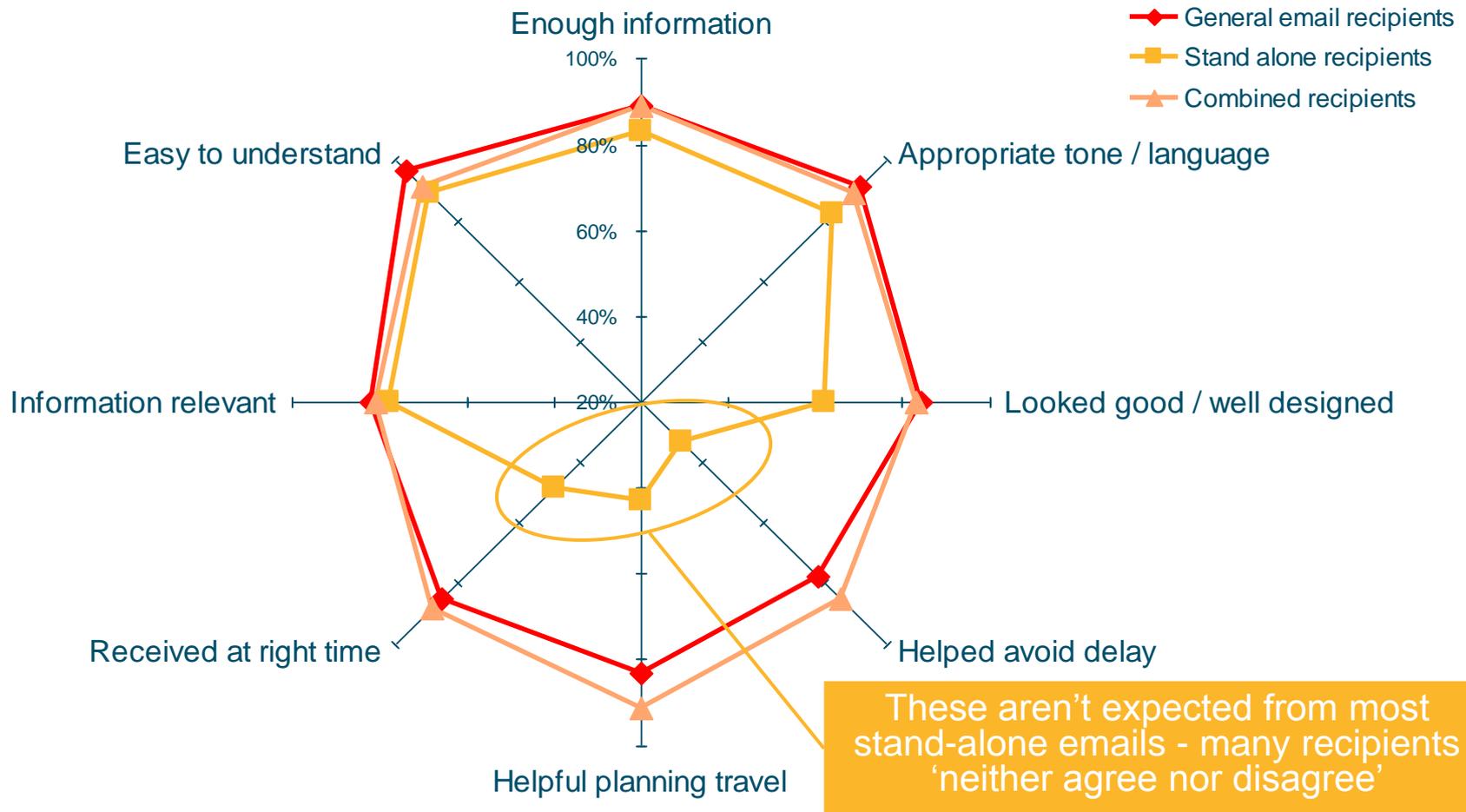
	general	stand alone	combined
• To check / find information (on weekend travel/ line closures / disruptions / etc.)	42%	16%	39%
• I was planning to travel / to see if affected my journey	20%	3%	27%
• See what it said / have a look (general)	7%	9%	1%
• In case it was important / important information	5%	21%	11%
• Open all emails / habit / always open if sent to me	5%	7%	5%
• It was from Transport for London / TfL	5%	-	-
• Interested in it / what it had to say	4%	21%	7%
• To read it	2%	4%	7%
• The subject / title	1%	2%	-
• To check on Tube availability	-	3%	11%
• Best source of information for engineering works	-	-	4%
• Quickest way to find up to date information	-	5%	2%
• To work out alternative routes	-	-	3%
• Thought it was related to my Oyster card	-	9%	-
• Other	4%	8%	3%
• No particular reason	8%	-	-
• Don't know	1%	5%	<1%

Source: Q13 - Why have you tended to open this email / these emails from TfL?

Base: all opening email(s) from TfL recently (File1 - CATI sample) (n=169) /

stand-alone email recipients (File2 - online sample) (n=58) / combined email recipients (File3 - online sample) (n=207)

# Combined email openers are very positive about all aspects of the email(s). Stand alone email openers are positive, but fewer impacts on travel.

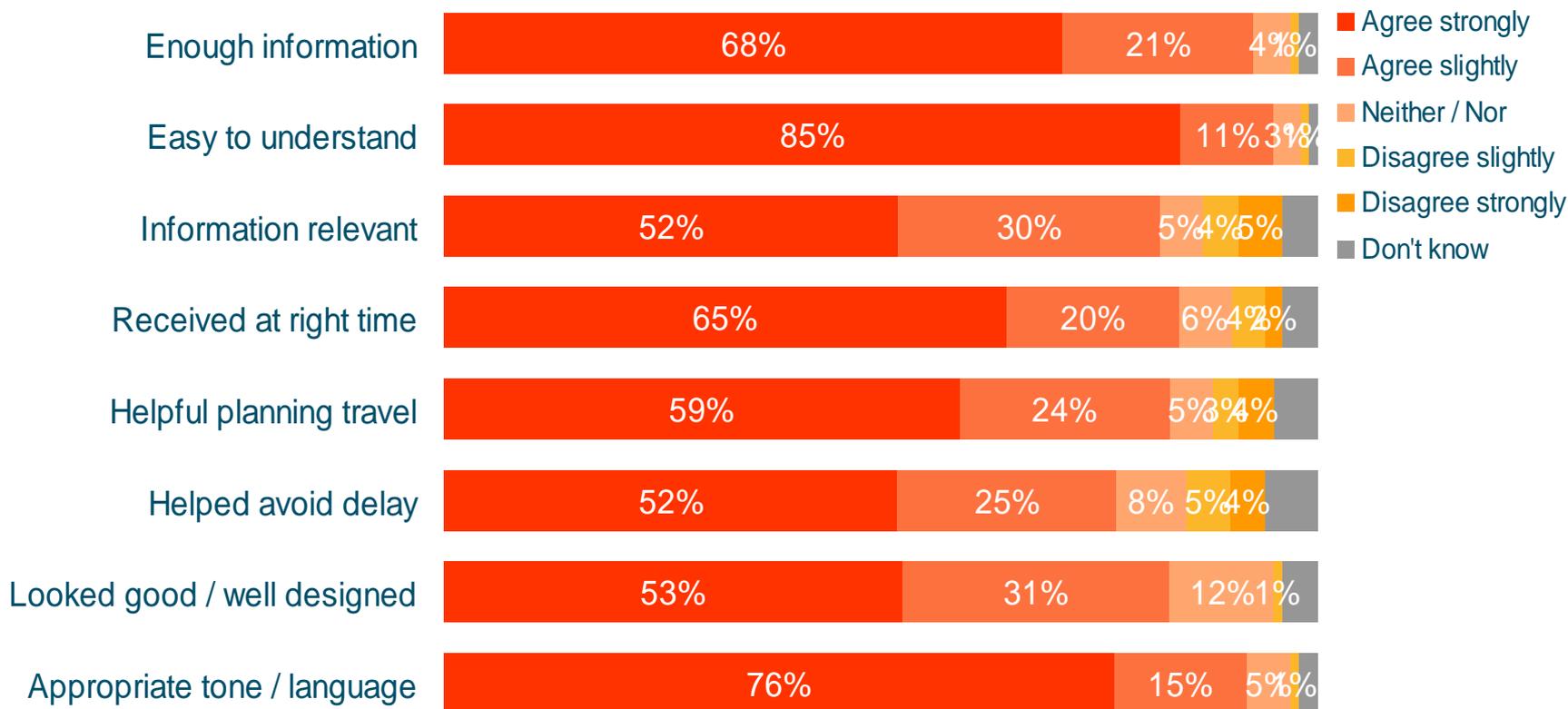


These aren't expected from most stand-alone emails - many recipients 'neither agree nor disagree'

Source: Q22a/b/c/d/e/f/g/h - Thinking about the email(s) that you received from TfL, how strongly would you agree...?  
 Base: all opening email(s) from TfL recently - combined email recipients (File3 - online sample) (n=207) / stand-alone email recipients (File2 - online sample) (n=58) / combined email recipients (File3 - online sample) (n=207)

# Those opening the emails are very positive towards all aspects of the emails, particularly ease of understanding and appropriate tone / language.

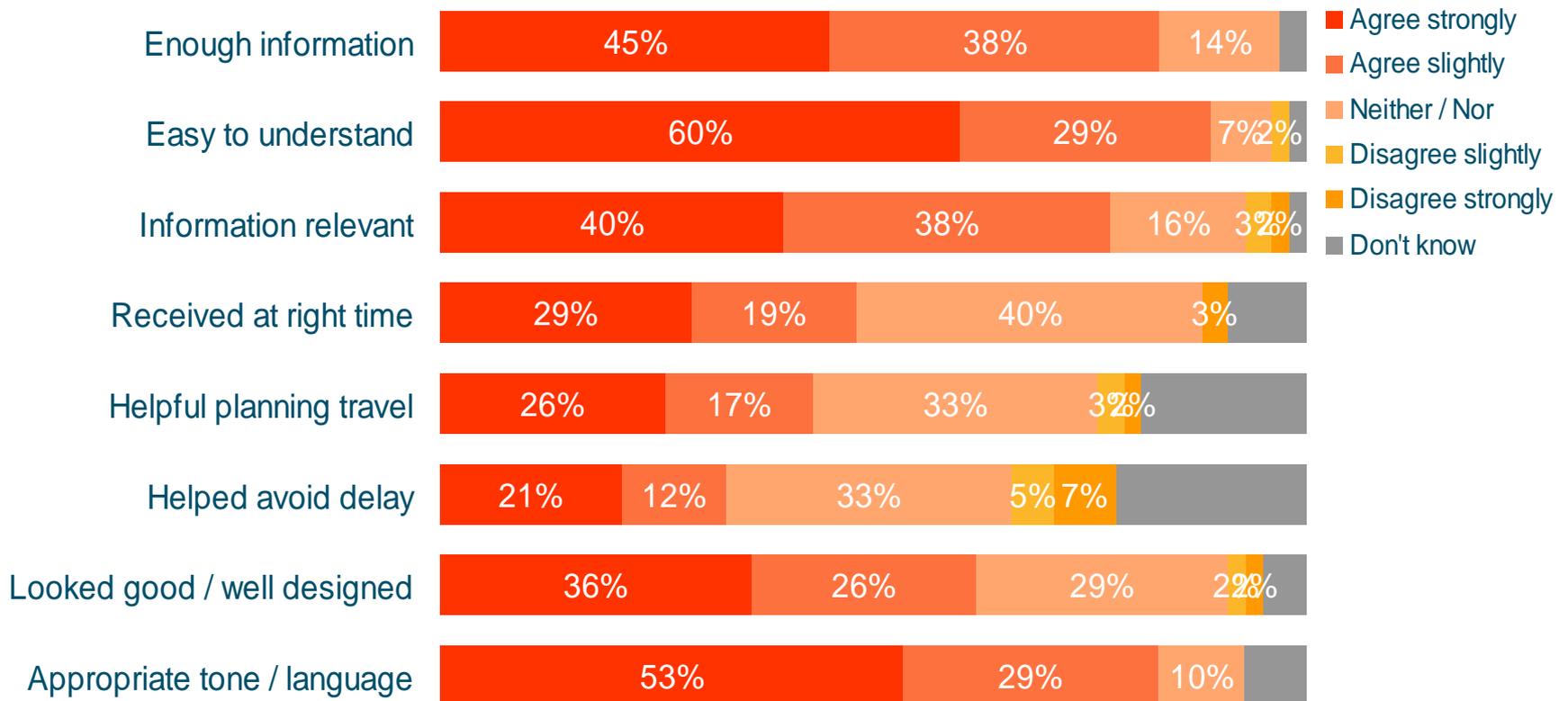
% of people opening email(s) from TfL recently



Source: Q22a/b/c/d/e/f/g/h - Thinking about the email(s) that you received from TfL, how strongly would you agree...?  
 Base: all opening email(s) from TfL recently (File1 - CATI sample) (n=169)

# Stand alone email recipients are generally positive towards all aspects of the emails.

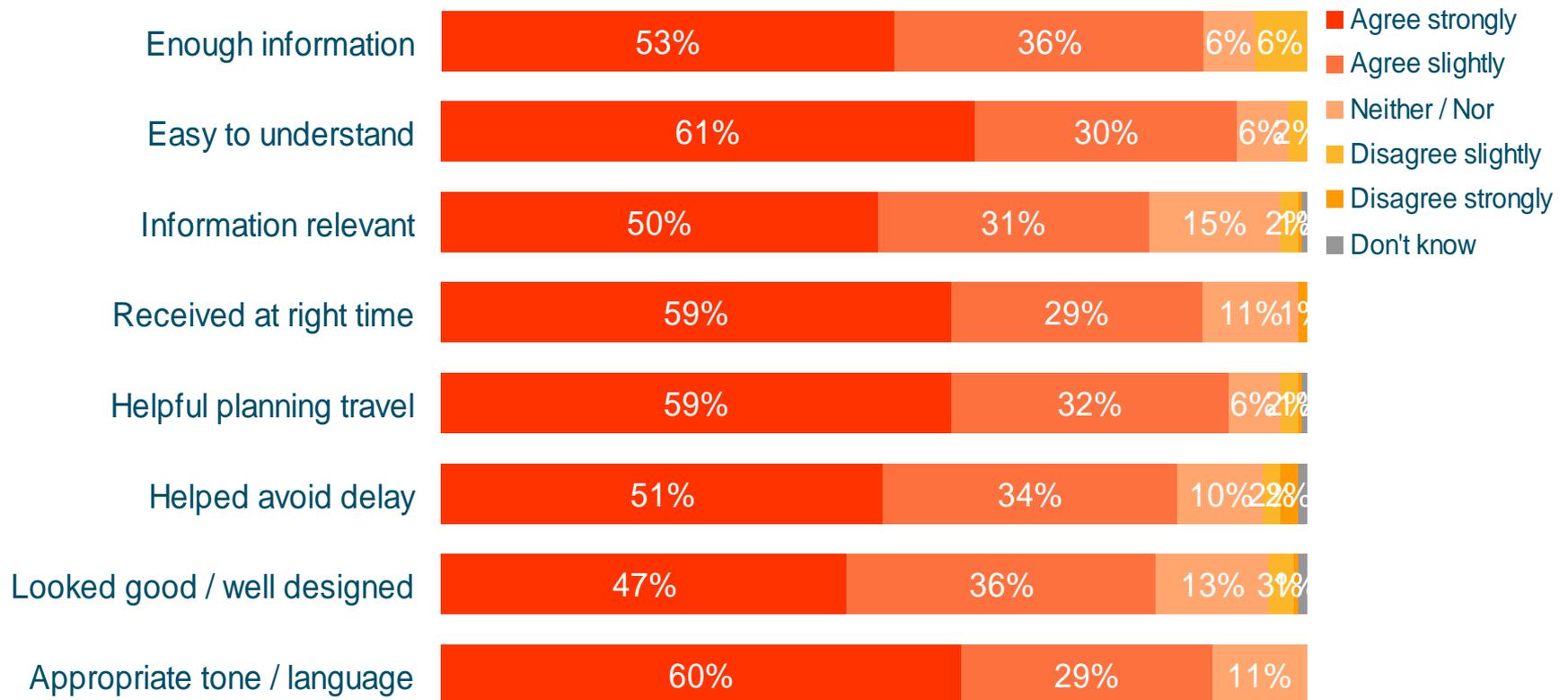
% of stand alone email recipients opening email(s) from TfL recently



Source: Q22a/b/c/d/e/f/g/h - Thinking about the email(s) that you received from TfL, how strongly would you agree...?  
 Base: all opening email(s) from TfL recently - stand-alone email recipients (File2 - online sample) (n=58)

# Combined email recipients are most positive towards the emails. Nine out of ten consider them helpful in planning travel / avoiding delay.

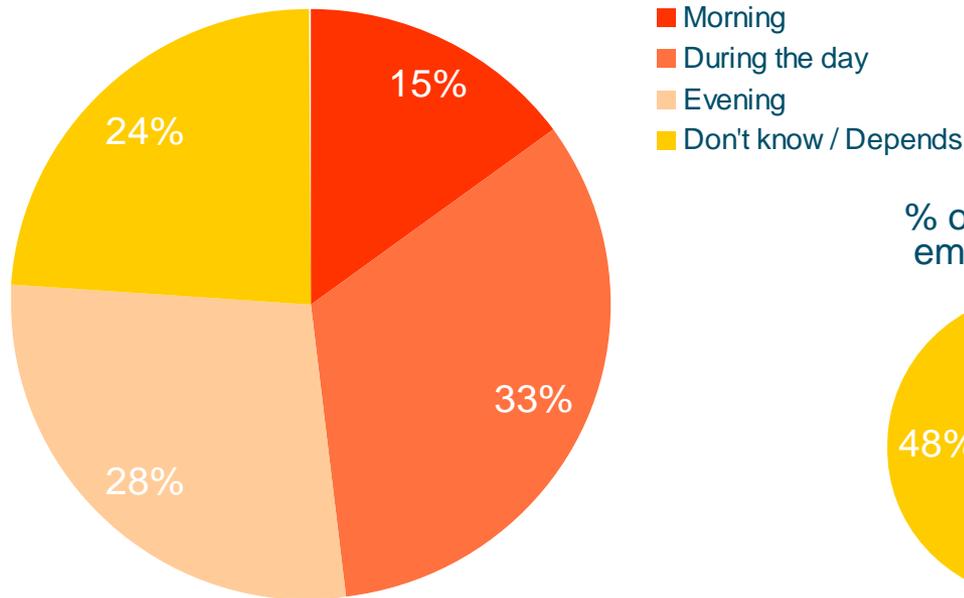
% of combined email recipients opening email(s) from TfL recently



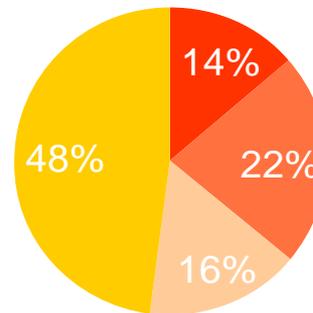
Source: Q22a/b/c/d/e/f/g/h - Thinking about the email(s) that you received from TfL, how strongly would you agree...?  
 Base: all opening email(s) from TfL recently - combined email recipients (File3 - online sample) (n=207)

# There is wide variation in when emails are opened.

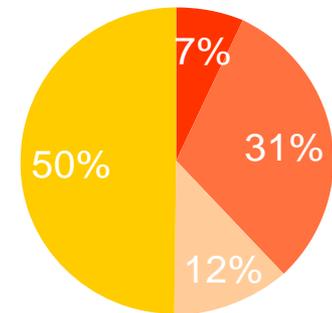
% of people opening email(s) from TfL recently



% of stand alone email recipients



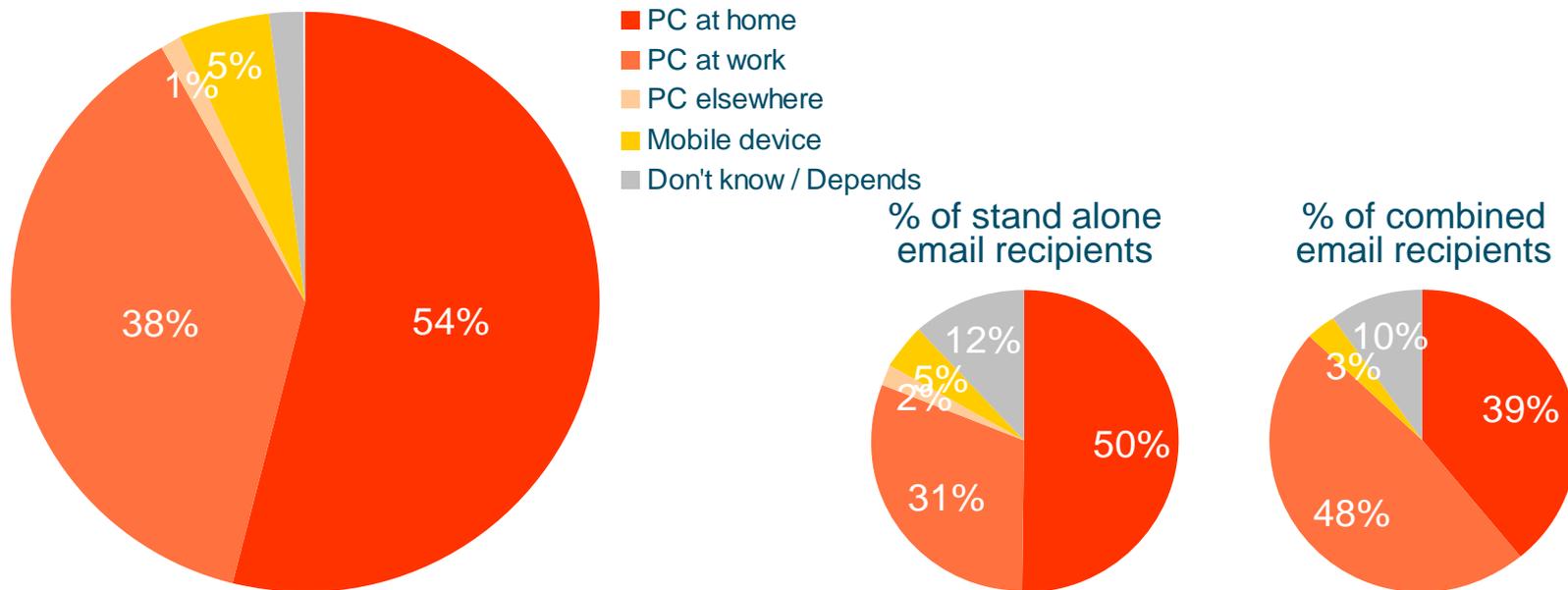
% of combined email recipients



Source: Q17 - When did you / do you tend to open the email(s) from TfL that you opened?  
Base: all opening email(s) from TfL recently (File1 - CATI sample) (n=169) /  
stand-alone email recipients (File2 - online sample) (n=58) / combined email recipients (File3 - online sample) (n=207)

Almost all open the emails on a PC, either at home or at work. Combined email recipients are more likely to open these emails at work.

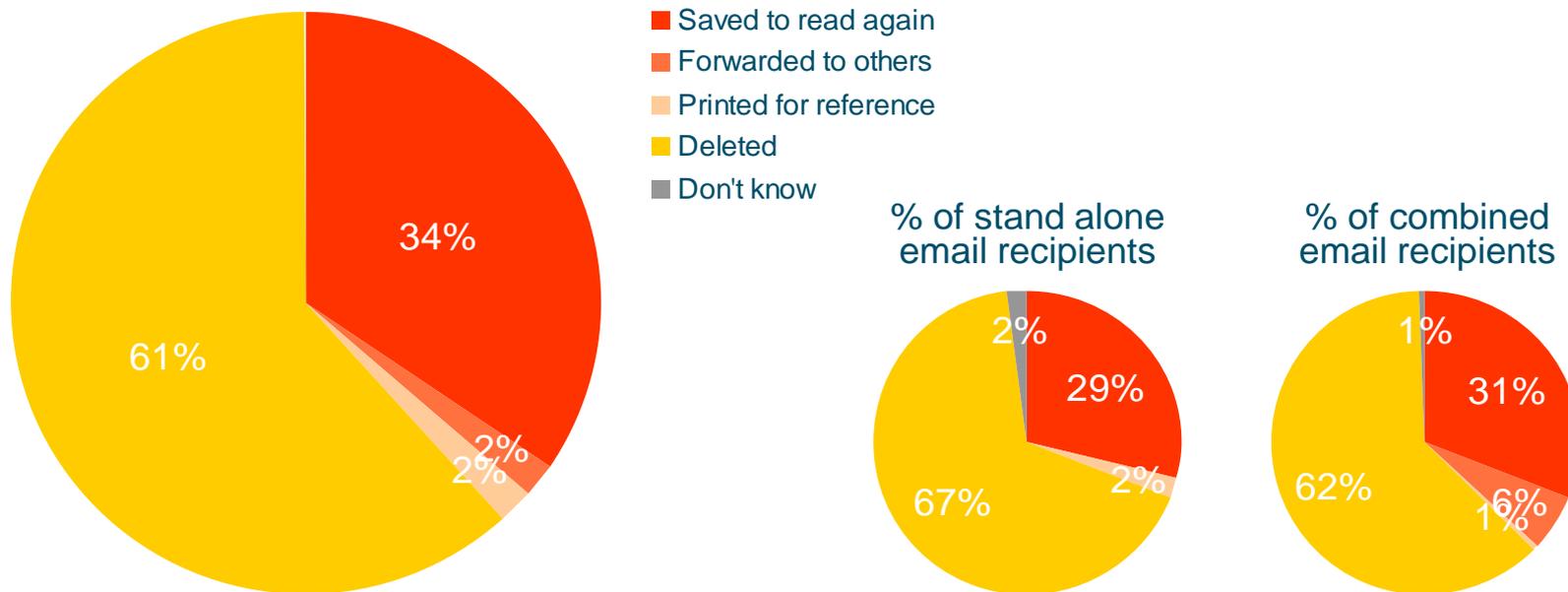
% of people opening email(s) from TfL recently



Source: Q18 - Where did you / do you tend to open the email(s) from TfL that you opened?  
 Base: all opening email(s) from TfL recently (File1 - CATI sample) (n=169) /  
 stand-alone email recipients (File2 - online sample) (n=58) / combined email recipients (File3 - online sample) (n=207)

# While the majority delete emails after reading, around one third do save them to read again.

% of people opening email(s) from TfL recently



Source: Q21 - What did you do with the email(s) from TfL that you opened?  
 Base: all opening email(s) from TfL recently (File1 - CATI sample) (n=169) /  
 stand-alone email recipients (File2 - online sample) (n=58) / combined email recipients (File3 - online sample) (n=207)

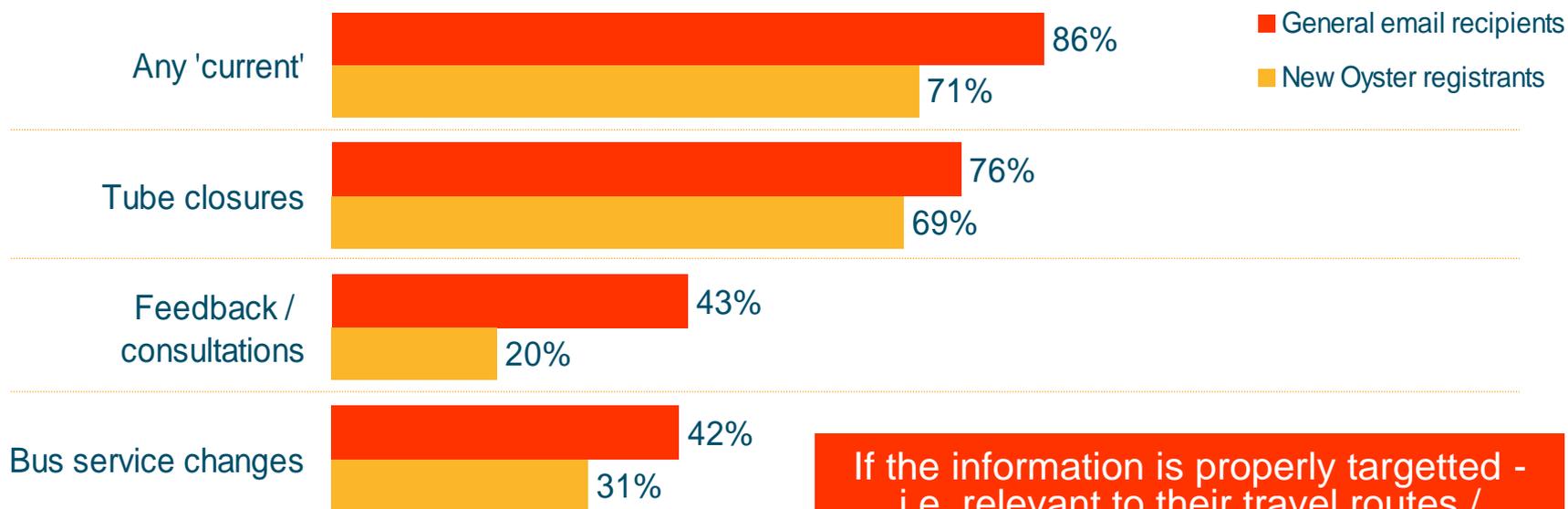


# Key Findings

- Openness to receiving more / different email(s)
- Views of new Oyster registrants

# Most are interested in at least one other type of 'current' information from TfL via email.

% of people known to have been sent email(s) from TfL recently

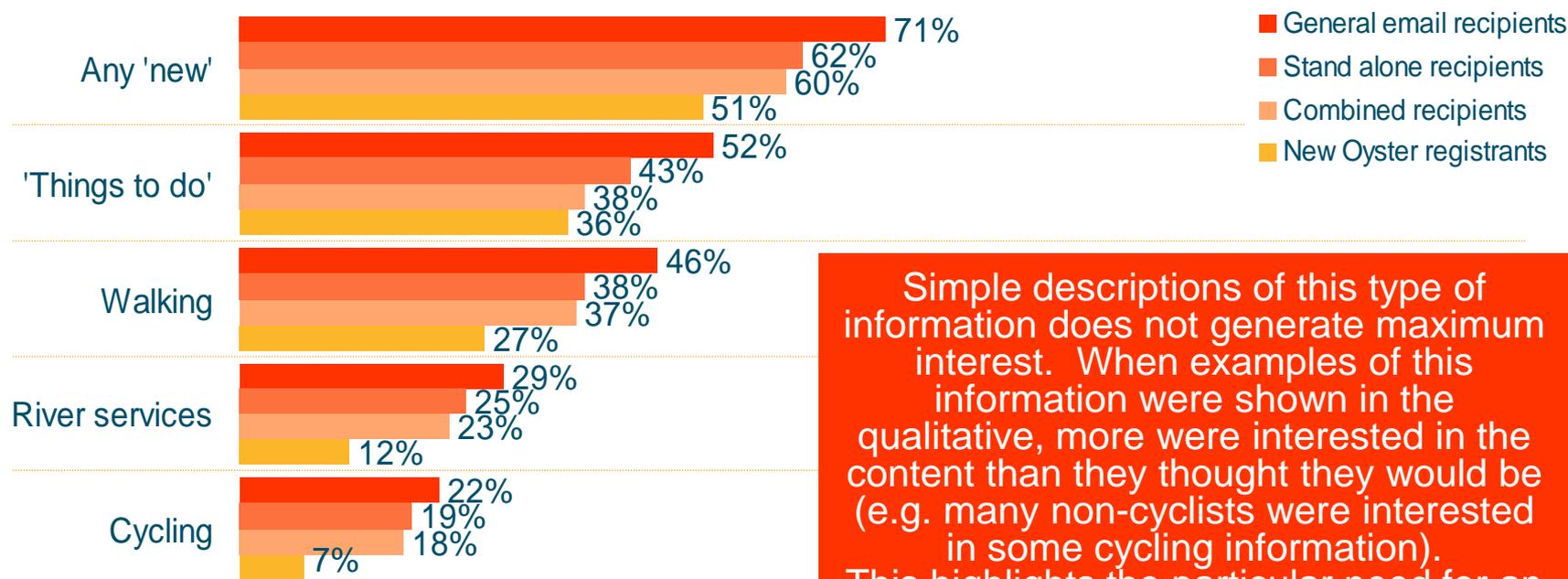


If the information is properly targeted - i.e. relevant to their travel routes / services, the information is likely to be well received. Moreover, very few will question why / how they came to receive this information without asking for it.

Source: Q24 - In which of the following situations would you be interested in receiving an email from TfL? / Q29 - What of the following sorts of information might you be interested in receiving from TfL?  
Base: all known to have been sent email(s) from TfL recently (File1 - CATI sample) (n=300) / new Oyster registrants (File4 - online sample) (n=83)

# At least half are interested in receiving at least one type of 'new' information from TfL via email.

% of people known to have been sent email(s) from TfL recently / new Oyster registrants

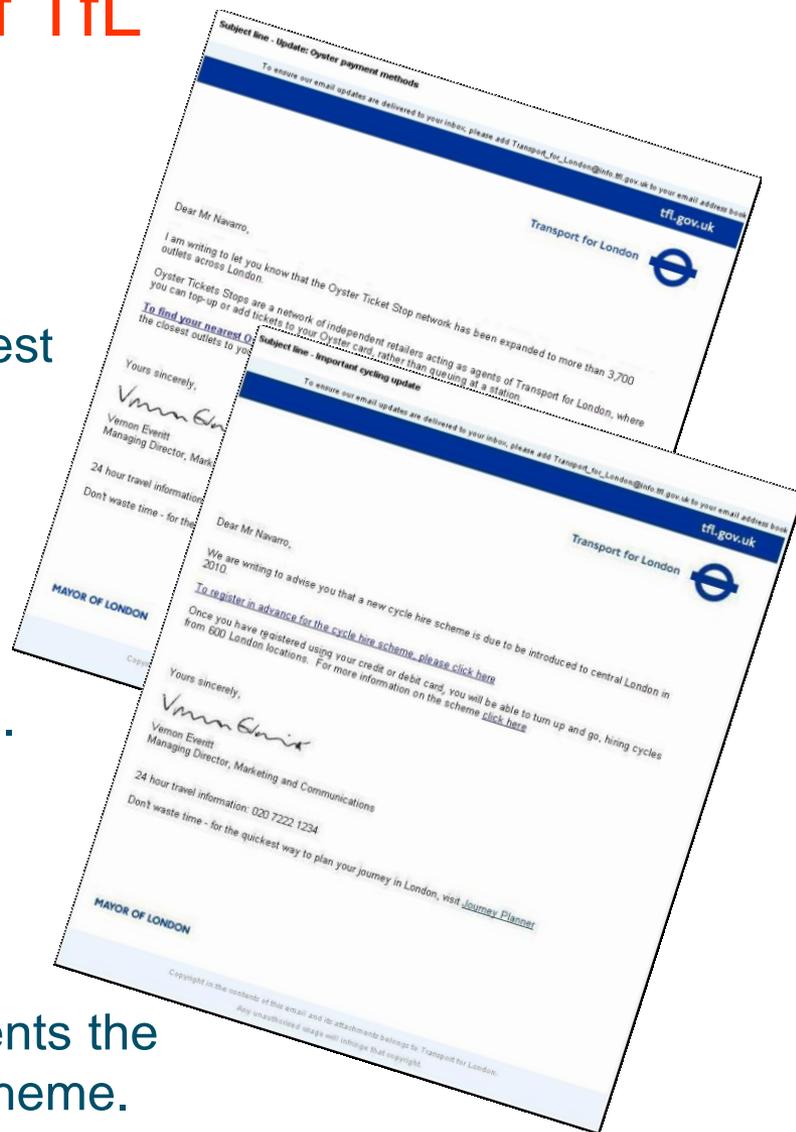


Simple descriptions of this type of information does not generate maximum interest. When examples of this information were shown in the qualitative, more were interested in the content than they thought they would be (e.g. many non-cyclists were interested in some cycling information). This highlights the particular need for an engaging but accurate subject line to encourage opening of these emails.

Source: Q25/29 - What of the following sorts of information might you be interested in receiving from TfL?  
 Base: all known to have been sent email(s) from TfL recently (File1 - CATI sample) (n=300) /  
 stand-alone email recipients (File2 - online sample) (n=167) / combined email recipients (File3 - online sample) (n=240) /  
 new Oyster registrants (File4 - online sample) (n=83)

# There is seemingly scope for emails to widen the awareness and perceptions of TfL

- Simple descriptions of 'new' information don't generate maximum interest.
- Given examples, there was genuine interest and surprise at some of the information, and positive (re-)appraisal of TfL. There was an appetite to know more.
- This reveals an openness and interest in more information from many customers.
- It also highlights the importance of an engaging but accurate subject line to encourage opening of these emails, e.g. 'Important cycling update' misrepresents the content of information about cycle hire scheme.



# Loop e-zine receives a polarised response from customers

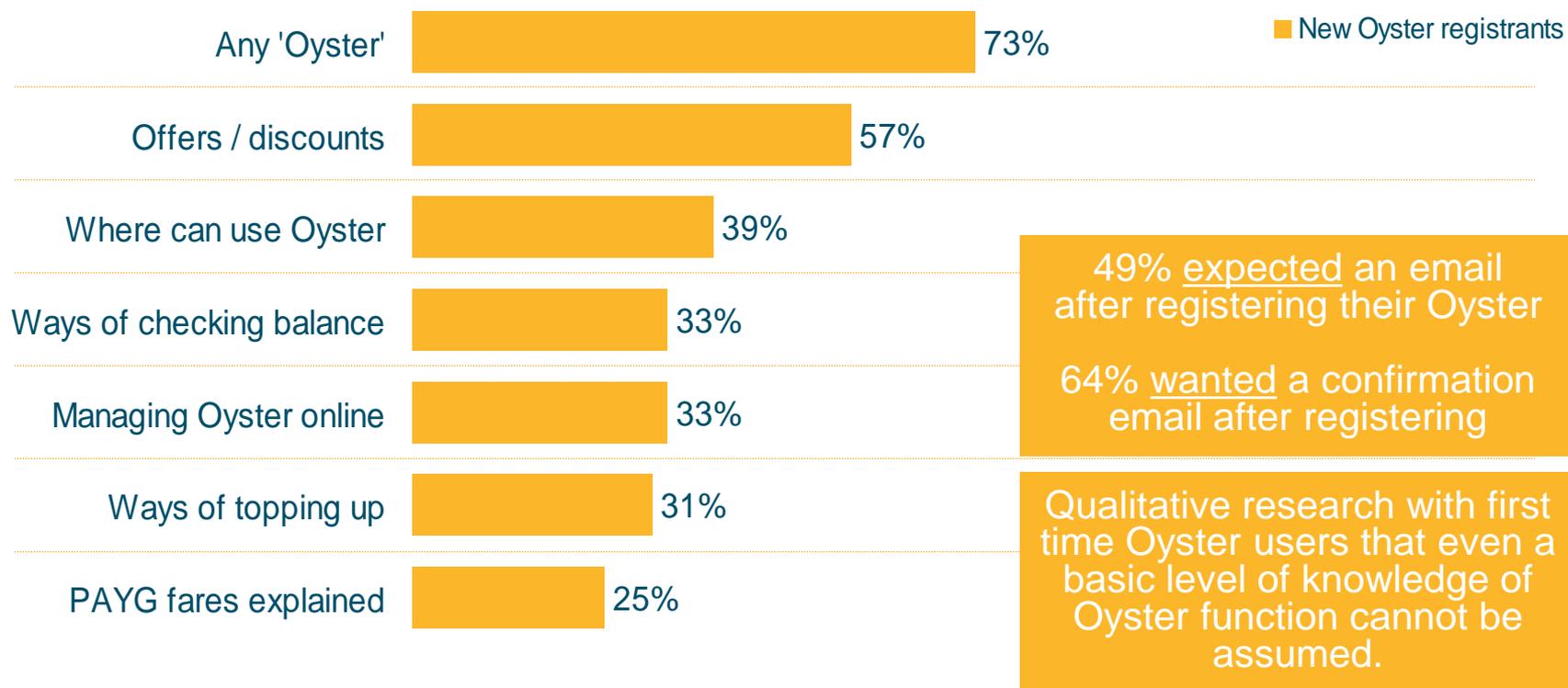
- For many customers this type of content can be seen as too 'marketing-led' and dismissed as spam.
- Customers' tolerance for receiving this information when unsolicited is much lower.
- This type of email is much more likely to lead to customers seeking to 'unsubscribe' from this - and potentially other - TfL emails.



- Some customers did appreciate this, however.
- For these, the visual style is engaging and the content is of interest.
- They appreciate the combination of travel and lifestyle information.
- Less frequent travellers, people new to London, those living in outer London, females, BAME all show increased interest in this 'Things to do in London' type content.

# At least half are interested in receiving at least one type of 'new' information from TfL via email.

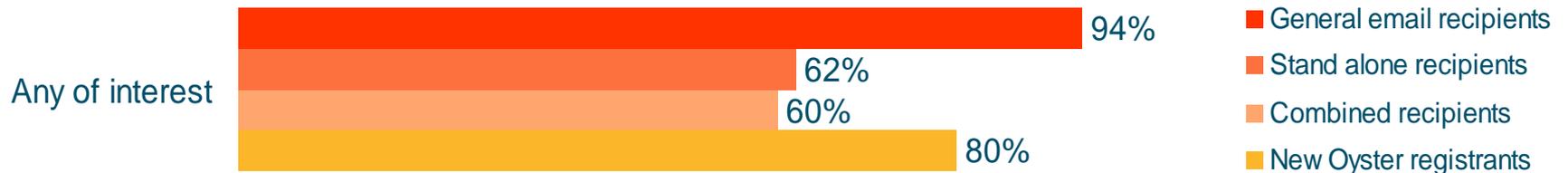
% of new Oyster registrants



Source: Q30 - What of the following information about Oyster might you be interested in receiving by email from TfL?  
Base: all new Oyster registrants (File4 - online sample) (n=83)

# Those who recall receiving emails are (relatively) less interested in receiving more / other types of information by email from TfL.

% showing interest in at least one current / potential type of information by email from TfL



Those interested in receiving (other) information by email from TfL are...

- less likely to recall TfL emails than those not interested (56% vs. 65%)
- more likely to be female than those not interested (53% vs. 44%)
- more likely to be living in London (81% vs. 73%)
- less likely to be working (83% vs. 90%)
- more likely to be PAYG users (78% vs. 67%) or weekly Travelcard / pass users (20% vs. 11%)

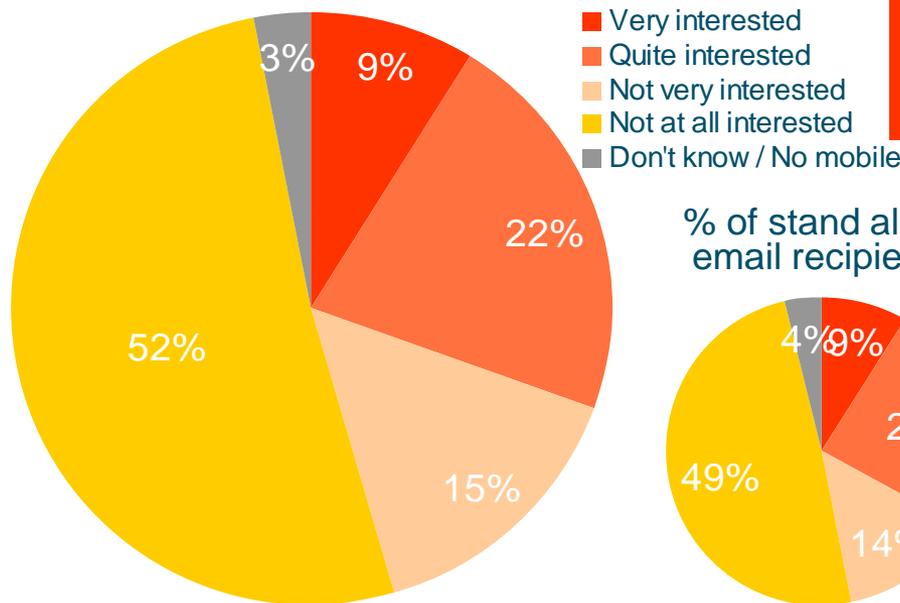
Source: Q24 - In which of the following situations would you be interested in receiving an email from TfL? /

Q25/29 - What of the following sorts of information might you be interested in receiving from TfL?

Base: all known to have been sent email(s) from TfL recently (File1 - CATI sample) (n=300) / stand-alone email recipients (File2 - online sample) (n=167) / combined email recipients (File3 - online sample) (n=240) / new Oyster registrants (File4 - online sample) (n=83)

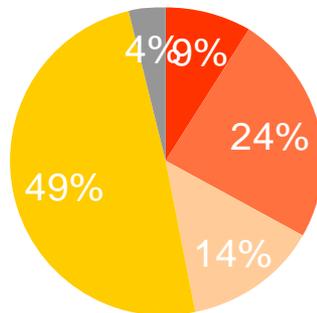
# At least half of customers are not interested in receiving text messages from TfL. Those that are expect this will only be for serious, relevant delays.

% of people opening email(s) from TfL recently

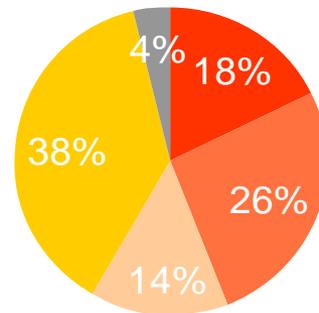


Unsolicited text messages are considered much more intrusive than emails. There is only expectation and (limited) acceptance of TfL contacting customers by SMS only in the event of serious disruptions significant to me. Anything else should be opt-in only.

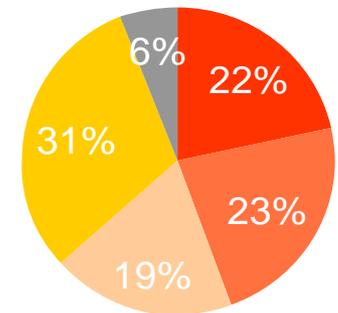
% of stand alone email recipients



% of combined email recipients



% of new Oyster registrants



Source: Q32a - How would you feel about receiving mobile phone text messages from TfL? / Q32b - In what situations would you expect TfL to contact you by text message?

Base: all known to have been sent email(s) from TfL recently (File1 - CATI sample) (n=300) / stand-alone email recipients (File2 - online sample) (n=167) / combined email recipients (File3 - online sample) (n=240) / new Oyster registrants (File4 - online sample) (n=83)



# Conclusions

# Conclusions

## There is permission to do more, assuming:

- Short, informative tone of messages is maintained.
- Content is information, and related to core business of travel.
- Information is intelligently targetted to be (likely to be) relevant.
- Rules on number / frequency of emails are kept: once a week maximum.
- Channel is via email. SMS is viewed differently and should ideally be opt-in.

## There is benefit in doing more, because:

- It can widen the awareness of TfL services.
- It can broaden the perceptions of the TfL brand.
- It can provide a helpful service to customers (i.e. help them avoid delays)
- It can encourage more effective use of / interaction with the system.

**An interesting / well targetted email is not questioned.**

**In many cases people are likely to think or feel like they had asked for it.**



# Appendix

- Quantitative sample profiles

## Socio-demographic profiles

	<b>General email recipients (File1 - telephone)</b>	<b>Stand alone email recipients (File2 - online)</b>	<b>Combined email recipients (File3 - online)</b>	<b>New Oyster registrants (File4 - online)</b>
Male	44%	51%	49%	48%
Female	56%	47%	50%	52%
16 to 34	44%	29%	53%	64%
35 to 54	45%	54%	36%	27%
55+	11%	15%	10%	10%
Working	89%	84%	90%	75%
Not working	10%	14%	9%	24%
White	80%	88%	83%	78%
BAME	18%	8%	10%	19%

Source: Q34 / 33 / 36 / 37

Base: all known to have been sent email(s) from TfL recently (File1 - CATI sample) (n=300) / stand-alone email recipients (File2 - online sample) (n=167) / combined email recipients (File3 - online sample) (n=240) / new Oyster registrants (File4 - online sample) (n=83)

## London residence / Public transport usage profiles.

	<b>General email recipients (File1 - telephone)</b>	<b>Stand alone email recipients (File2 - online)</b>	<b>Combined email recipients (File3 - online)</b>	<b>New Oyster registrants (File4 - online)</b>
Living in inner London	45%	29%	53%	52%
Living in outer London	35%	34%	33%	27%
Living outside of London	18%	37%	13%	16%
Bus / Tram user	83%	87%	88%	94%
Tube / DLR user	97%	96%	99%	95%
Train user	71%	67%	73%	60%
Use public transport 5+ days / week	64%	35%	75%	73%
Use public transport 1-4 days / week	25%	35%	21%	18%
Use public transport less often	11%	30%	4%	8%

Source: Q35 / Q1 / Q2

Base: all known to have been sent email(s) from TfL recently (File1 - CATI sample) (n=300) / stand-alone email recipients (File2 - online sample) (n=167) / combined email recipients (File3 - online sample) (n=240) / new Oyster registrants (File4 - online sample) (n=83)

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