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**Secretariat memorandum**

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CAC015

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**Incomplete Oyster Pay As You Go journeys - qualitative research**

**1 Purpose of report**

- 1.1. To report back to members on progress in implementing the recommendations of the research commissioned by London TravelWatch to ascertain why a substantial proportion of journeys made on Oyster Pay As You Go (PAYG) are often left unresolved

**2 Recommendation**

- 2.1. Members are recommended to note and welcome the introduction of 'Autofill' for around 1,500 passengers a day, and also the introduction of much easier to understand online usage statements.
- 2.2. Members are recommended to welcome the approximately 10% increase in the number of passengers claiming refunds since the publication of our research in June, but note that this only represents around 1 in 6 of all unresolved journeys and that total unresolved journeys continue to rise.
- 2.3. Members are invited to discuss any further action that they would like to take up with Transport for London (TfL) and the Association of Train Operating Companies (ATOC).

**3 Main findings of the research and response to date**

3.1 The key findings were:

- Even when Oyster PAYG users are aware that an incomplete journey has occurred, many perceive that the effort required to resolve an incomplete journey, is not justifiable for the sums involved.
- There is frequent evidence to indicate that incomplete journeys are often the result of knowledge gaps with Oyster PAYG, which is not as straightforward to use in reality as many initially assume. Many are unsure why or when incomplete journeys are made, although confusion when interchanging between modes is the most critical issue.
- Knowledge gaps among users typically extend to the options available and the systems in place that are intended to resolve incomplete journeys

when these occur. This provides a partial explanation for why such a high proportion of incomplete journeys are left unresolved since users currently feel that the onus of this responsibility falls too heavily on them.

- Importantly, poor perceptions or experiences of the resolution process represent a major additional barrier for users to challenge having the maximum fare applied for incomplete journeys. The time and cost of using the 0845 helpline number represents a significant disincentive as do National Rail and London Underground staff who are often perceived to be unable or unwilling to provide a resolution. Furthermore, users are uncertain about how liability for incomplete journeys will impact on the outcome of any attempt to resolve them.

#### **4 Recommendations for improvement by Transport for London (TfL) and the rail industry**

4.1 This research indicates that the following should be considered by TfL and the rail industry:

##### **1. An Oyster information / education campaign is required to plug the information gaps that are the root cause of many incomplete journeys**

- To explain the usage protocol when interchanging
- To inform users what to do beyond Zone 6
- To create awareness of procedures to resolve incomplete journeys
- To reinforce overall VFM perceptions of Oyster

**Comment:** London TravelWatch is not aware of any official attempts to address this issue, although it is noteworthy that a number of privately maintained websites run by individuals do give substantial information of this kind. Note we understand that since June 2011 there has been an approximate increase of around 10% (15,000 extra journeys per month) of the total numbers of journeys being resolved by passengers – that must be attributable to the considerable media coverage that our report generated.

##### **2. The campaign will need heavy and targeted support at a more local level, at ungated and interchange stations especially**

- To increase the presence and visibility of readers
- To improve signposting / access to readers
- To provide clear instructions about where / when to touch in / out
- To provide clear information as to where card balance information can be obtained

**Comment:** London TravelWatch has had various discussions on this issue with individual train operators and although there is general agreement that it would be ‘a good thing’ to implement this recommendation, there is a reluctance on the part of individual operators to do this without central direction, and a universal design and standard of vinyls and signage. London TravelWatch recommends that as a first

stage readers should be given vinyls of the same design as those in use on the Docklands Light Railway (DLR) that

**3. Barriers that currently prevent users from resolving incomplete journeys need to be addressed and removed to maintain positive value for money perceptions**

**Comment:** TfL have promised that at a later date it should be feasible for passengers to be able to resolve 'incomplete' journeys through their website. This should go some way to addressing this issue. The lack of an ability to resolve incomplete journeys at National Rail stations is still a major issue, given the fact that National Rail services predominate over the Underground in large parts of South London.

**4. Improved availability and access to card balance information is required**

- Statements need to provide clear summaries of journeys and charges indicating when price caps have been applied or maximum fares have been charged
- Replace and update all ticket vending machines to include the ability to view balances, top up and add Oyster products (especially on London Tramlink)

**Comment:** TfL has recently changed the format of their online statements, such that they are now more easily understood, flag up where incomplete journeys have been made, and are in line with the recommendations we have made.

South West Trains, currently the only rail operator in London which does not have the facility for topping up Oystercards or for passengers to view their Oyster balances at ticket vending machines, will shortly be introducing Oyster capability to these machines that they have in the London area. This will be a significant extra resource which will allow passengers easier access to their balance information, and therefore the ability to work out whether they have been charged a maximum fare or not.

We await further comment from TfL on any proposals to replace the current ticket vending machines used by London Tramlink.

**5. Access to resolution solutions needs to be improved and experiences of the process need to be enhanced**

- Customer service contact needs to be more positive and consistent
- Application and refund procedures need to be streamlined
- Barriers to re-claiming small sums of money need to be removed
- All stations where you can use Oyster should be able to resolve Oyster related problems

**Comment:** As noted in 3 above the inability to resolve Oyster related problems at National Rail stations is still a significant problem. We have also raised with TfL the fact that some TfL outlets such as the Tramlink shop in Croydon and TfL bus station offices are also unable to resolve Oyster related problems. Given that potentially

there are likely to be less contractual problems than with National Rail operators this should be explored as a lower cost option.

**6. Quantification will be required to provide a more accurate assessment of the nature and extent of some specific elements of the problems users experience with incomplete journeys**

**Comment:** This will further discussion with TfL and ATOC to determine whether additional work is required to explore this area further – for example by further focus groups.

- 4.2 An area of concern is the apparent ‘invisibility’ of the application of different fares at peak times amongst Oyster users. As noted in the report this has severe implications for public and commercial policies aimed at using the price mechanism to reduce overcrowding at peak times.

**Comment:** We await details of the proposed changes to fares in January 2011 to confirm whether any changes are proposed to deal with this issue.

**5 Equalities and inclusion implications**

- 5.1. There are no specific equality or inclusion implications arising from this report.

**6 Legal powers**

- 6.1. Section 248 of the Greater London Authority Act 1999 places upon London TravelWatch (as the London Transport Users Committee) a duty to consider - and where it appears to the Committee to be desirable, to make recommendations with respect to - any matter affecting the functions of the Greater London Authority or Transport for London which relate to transport (other than of freight). Section 252A of the same Act (as amended by Schedule 6 of the Railways Act 2005) places a similar duty upon the Committee to keep under review matters affecting the interests of the public in relation to railway passenger and station services provided wholly or partly within the London railway area, and to make representations about them to such persons as it thinks appropriate.

**7 Financial implications**

- 7.1. There are no financial implications for London TravelWatch arising from this report.