

The Future of Oyster

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Challenges of a large PAYG area

Proposition

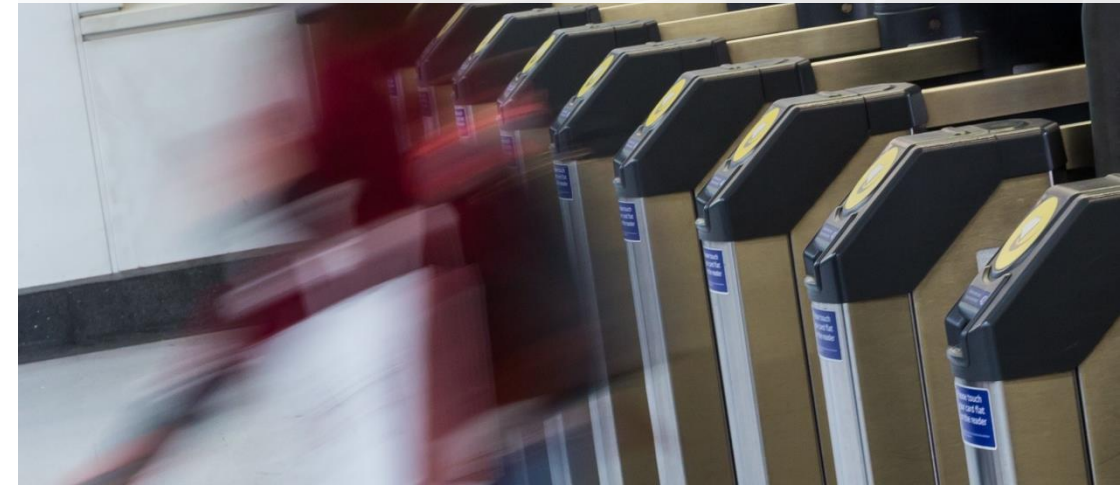
- High value fares create revenue risk
- More frequent top-ups unattractive
- Auto Top-up “breaks”

Technical

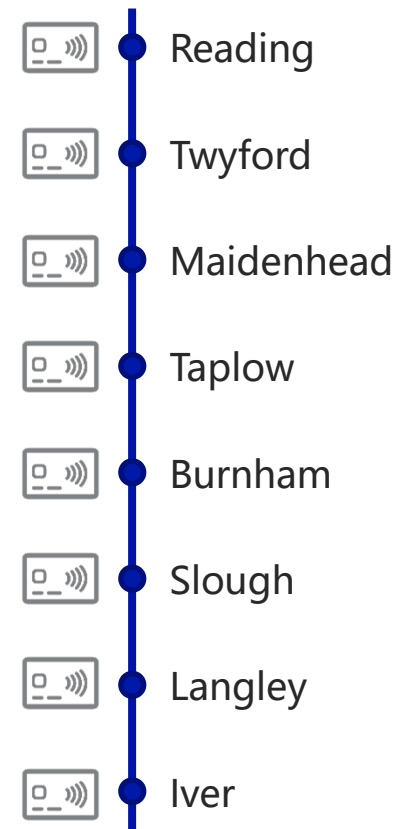
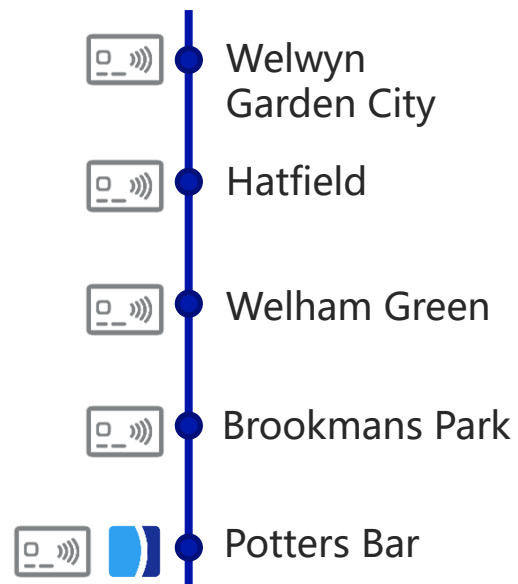
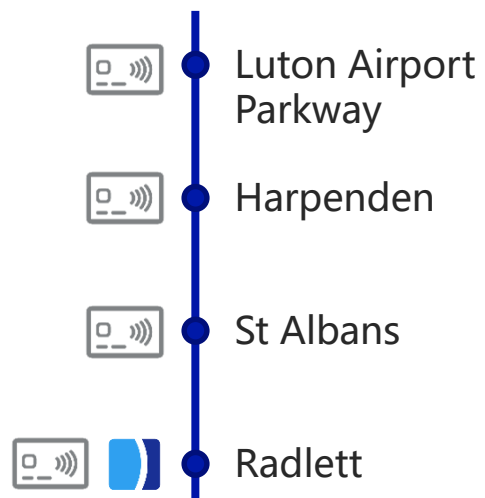
- Zonal system at capacity
- Fares structure outside London lacks hegemony
- New functionality complex and expensive



Contactless
will mitigate many of
these risks and
challenges



Pay As You Go Extensions in 2019-20



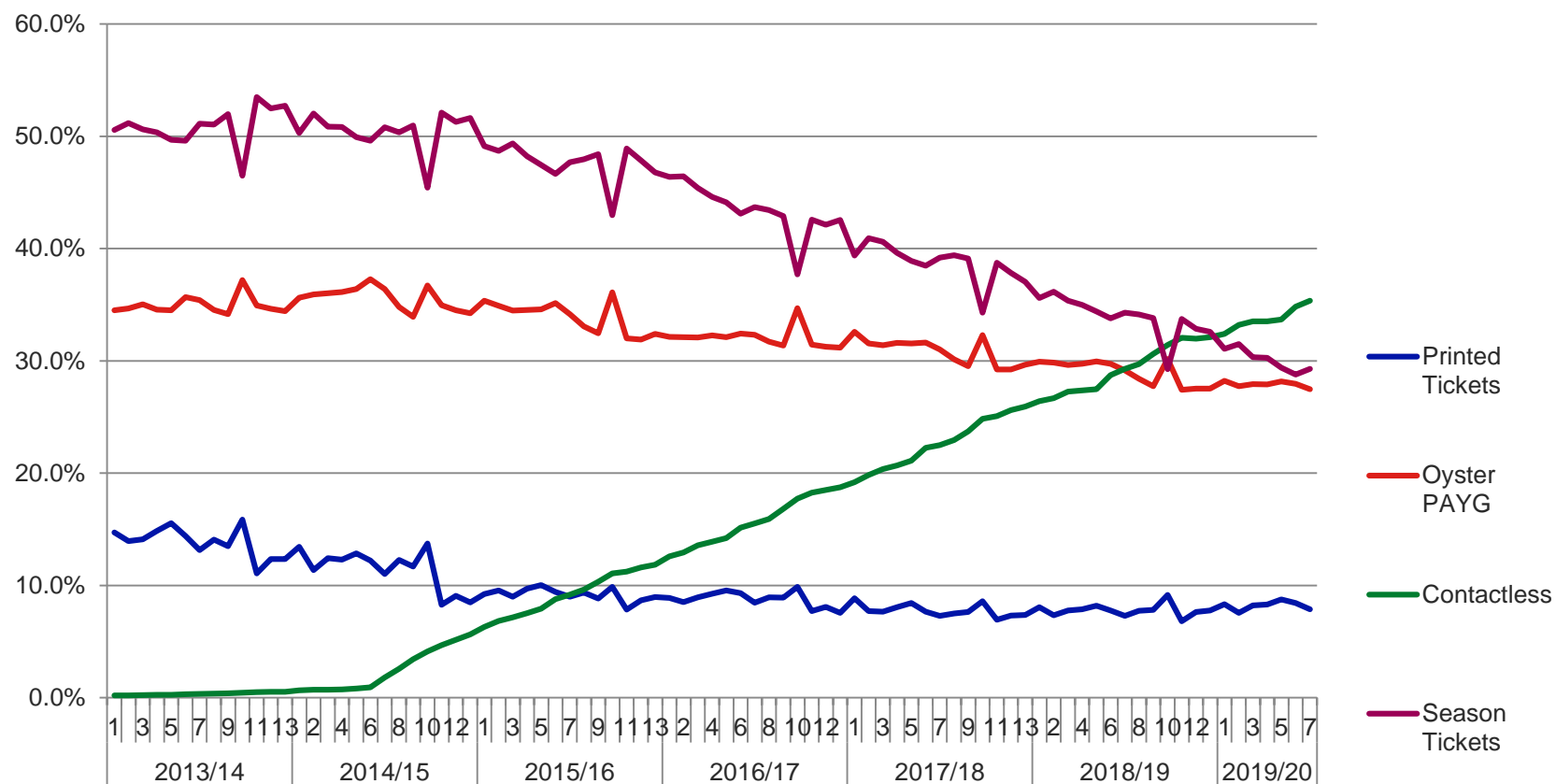
Pay As You Go Extensions in 2019-20



Extension to
• **Reading**
is the first TfL service
NOT to accept Oyster



Contactless is still growing



2/3 journeys are made using PAYG



Season Tickets have fallen by 50% since contactless was introduced















Journeys requiring a daily ticket to be bought are c.8%





But...














-  Cash
-  Concessions
-  Season Tickets
-  Children
-   Pay as you Go
-   Daily Capping
-   Visitors
-  Weekly Capping
-  Convenience

Today, Oyster continues to meet a broader range of customer needs than contactless...





But...

-  Cash
-  Concessions
-  Season Tickets
-  Children
-   Pay as you Go
-   Daily Capping
-   Visitors
-   Weekly Capping
-  Convenience

Today, Oyster continues to meet a broader range of customer needs than contactless...

And it will continue to do so



Customer segments still requiring Oyster

People who choose not to use contactless

Cash economy

Manage budget carefully

Some visitors

Customer who prefer to buy a season ticket in preference to capping

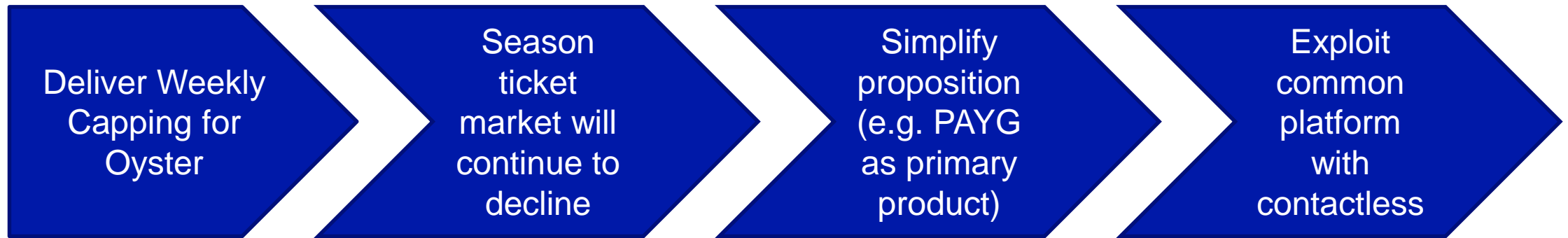
People who we won't allow to use contactless

Concessions

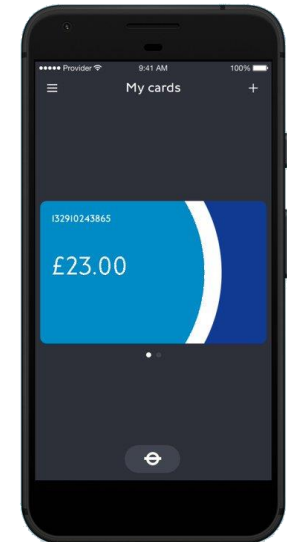
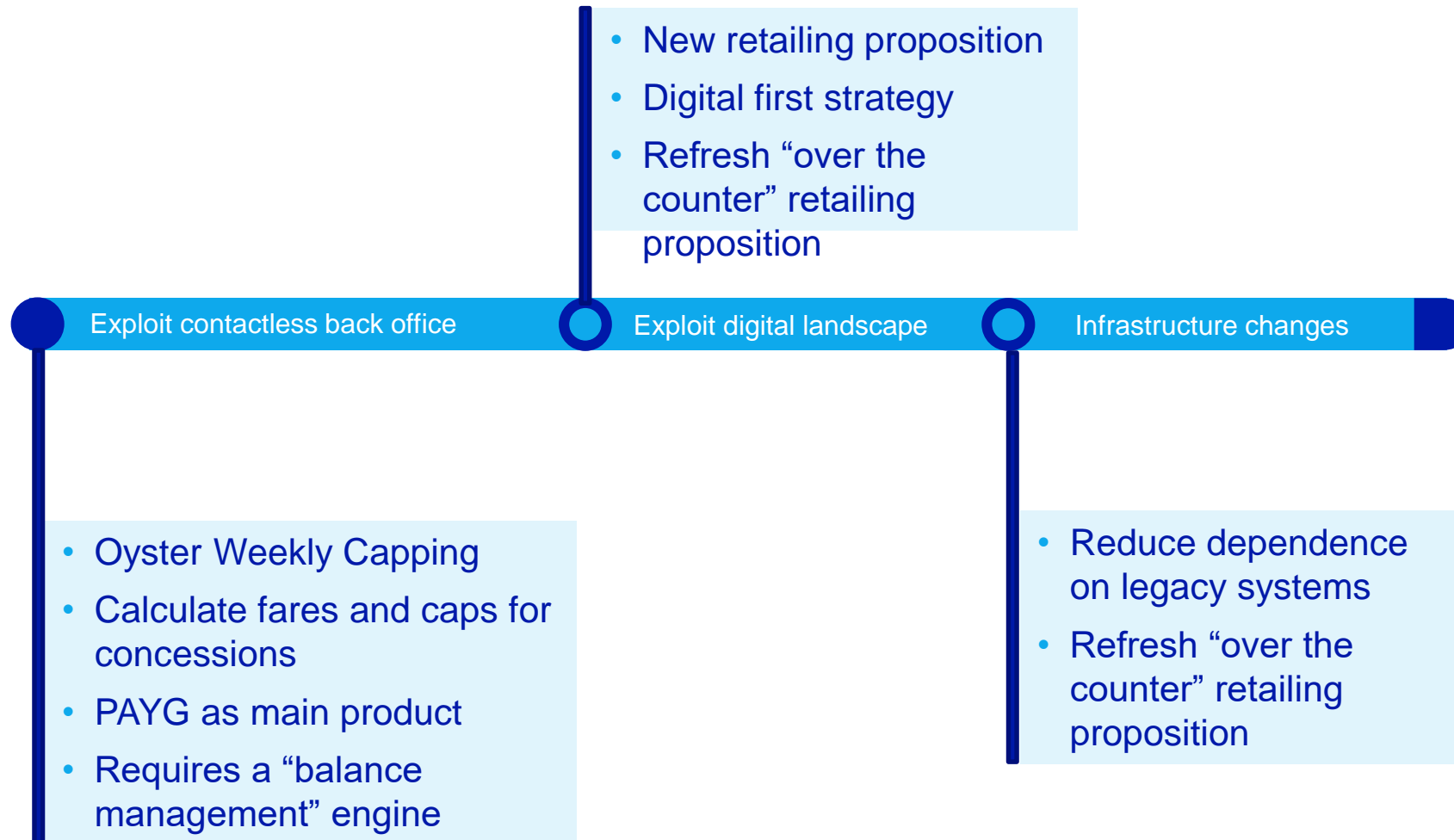
We still issue
up to 30,000
Oyster cards
every day



How to develop Oyster to 2030



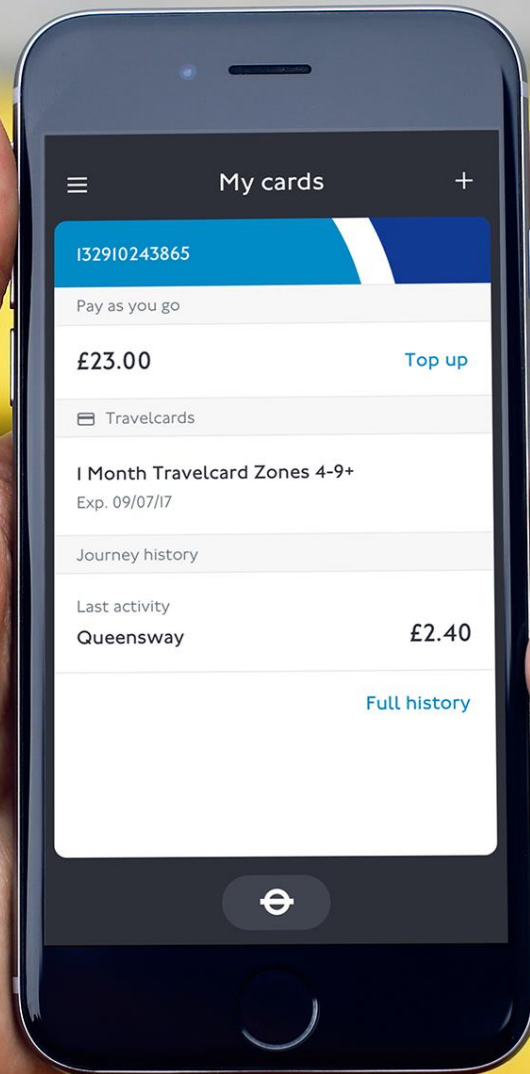
New opportunities



An updated and refreshed proposition which keeps Oyster ahead of the customer



Long term benefits for TfL



- ✓ Simplified infrastructure
- ✓ Improved use of staff time
- ✓ Reduced fraud
- ✓ Increased system reliability
- ✓ Improved customer satisfaction



Why this is good for our customers

Commuters

Confidence in
value for money

Visitors

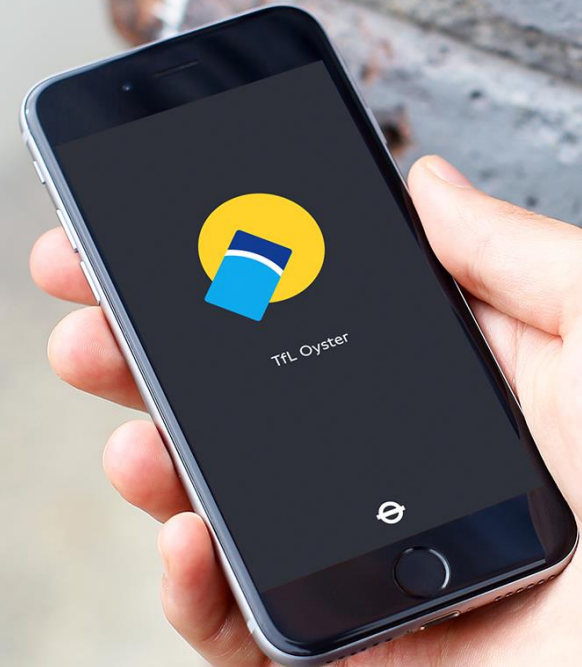
Accessibility
Certainty

Employers

Easy access to
green travel
initiatives

Large Events

Simple digital
solution



Contact

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