

Transport for London

Digital Media Monitor 2012
Final report
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MAYOR OF LONDON

Transport for London





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Reporting note

TfL project numbers for the previous three waves of this research are: 08204 (2009), 09092 (2010) and 10058 (2011)

Throughout this report, data from January 2012 are compared with previous waves of research. Statistically significant differences with previous waves are shown as follows:



Significantly higher than January 2011



Significantly lower than January 2011



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Research conducted by SPA Future Thinking



Objectives and methodology

Monitoring the trend in digital media use by Londoners

The key objectives of the Digital Media Monitor are to update existing information on the proportion of Londoners who:

- Use the internet for various tasks
- Own mobile phones and other devices
- Use mobile devices to access information online
- Access online services generally
- Use the TfL website

Methodology

- 1,000 telephone interviews
- With Londoners (representative of adults aged 16+)
- Fieldwork completed January 2012
- A more detailed methodology is found in the appendix



Summary





Internet use

Internet access

- ➔ Almost nine in ten Londoners have access to the internet at some place (88%). This level of internet access has remained fairly steady since the beginning of 2008
 - Most have access at home (86%), half at work (55%) and now half of Londoners have access 'on the move' (49%)
- ➔ Disabled Londoners, over 55 year olds and those in socio-economic groups DE continue to be more likely than others **not** to have internet access
- ➔ Almost all of those with access to the internet use it at least once a day (88%)

Activities undertaken online

- ➔ Sending and receiving emails and finding/sourcing information continue to be undertaken by almost all those with internet access (94% and 93% respectively)
- ➔ The proportion of internet users who buy goods and services online has increased again this year, rising to 87% (from 81%)
 - The top reasons why a minority of Londoners do **not** shop online are worries around security and a preference to visit shops

Internet access via a mobile device

- ➔ There has been strong growth in mobile internet in 2011, including increases in the proportion of Londoners accessing the internet via mobile devices, the frequency of use and in the range of activities carried out via mobile internet
- ➔ Over half of Londoners (58%) now own a smartphone of some type (up from 43% in 2010)
 - The proportion using each of the main smartphone brands is evenly split – 22% iPhones, 21% Blackberry and 18% Android
- ➔ Ownership of tablet computers has also grown significantly since last year – now 13% own tablets compared to 6% in 2011
- ➔ Over half of Londoners (55%) access the internet via a mobile device at least once a month, with 40% doing so everyday
- ➔ Internet activities undertaken on mobile devices have a similar pattern to general internet activities except for those relating to purchases/finance or which require large data downloads – where use is generally lower on mobile devices
 - Accessing live public transport information via mobile has risen to 64% of mobile internet users, from 58% (although this is not statistically significant)
 - Social networking and playing games are relatively higher on mobile devices than general internet use



TfL's website and journey information

Use of TfL's website (all elements including Journey Planner, Congestion Charge, iBus, Oyster services)

- Three quarters of Londoners use TfL's website, with over half of Londoners using it at least once a month
- As with general internet access, older Londoners, those with a disability and those from socio-economic groups DE are less likely to use TfL's website – this pattern (which was also seen in the 2011 wave of the research) is still present even after adjusting for internet access
 - 86% of Londoners in full time work use the TfL website, compared with 77% of those working part time and just 58% of non-working Londoners. (Note that there is some overlap between the groups less likely to be TfL website users – between older people, those in lower socio-economic groups, those not in work, and disabled Londoners)
- A third of Londoners access TfL's website via a mobile device and 40% of these users do so at least three or four times a week
 - When accessing TfL's website via a mobile device, users are generally on the move (89%) – also over half access services from work/education (57%), and just under half from home (45%)
 - Just under three quarters (72%) of those accessing TfL's website on mobile devices find it useful to be able to use this channel - and 40% score it 5 out of 5 on usefulness

Journey information services

- TfL.gov.uk is the most commonly accessed source of online London travel information
 - Eight out of ten Londoners that access the internet look at TfL.gov.uk for this information
- TfL still leads the way for obtaining information about problems or delays encountered during journeys in London. Over a quarter of Londoners look to the TfL website for this information – though a similar proportion say they use Facebook for this
- When asked what sources they are likely to use (about problems or delays encountered during journeys) in the future, 50% of Londoners say they would use TfL's website on a mobile device. The attraction of 'apps' is evident, as nearly as many said they would use a mobile application (49%) while use of Twitter is not yet as strongly developed, as it was mentioned by 20% of Londoners
- Only a small proportion (8%) of Londoners use social media to discuss day to day London travel or transport related issues – amongst those that do, Facebook is the most common platform used



Taxi & private hire, next bus and QR codes

Taxi and private hire apps

- ➔ More than half of Londoners (55%) are aware of apps to book taxis or private hire vehicles
 - However, use is much lower – just 12% of those who are aware of these apps have downloaded one
- ➔ Of those who have not booked a taxi or minicab via an app, the main reason is a reported lack of need (by 45%). 24% prefer to book in a different way, 15% don't have a mobile phone that could download apps, and 5% don't know how to use Apps
 - This indicates barriers to using apps for booking taxis or minicabs are not strong

Next bus arrival service

- ➔ More than a third of Londoners (38%) are aware of the next bus arrival services (33% are aware of the website service, 32% the text/sms service)
 - 40% of those aware of the website service have used it, compared with 16% of those aware of the text service
 - The main reason for non-use is perceived lack of need

QR codes

- ➔ 18% of Londoners know what a QR code is
 - There are wide demographic variations with awareness highest amongst men, 25-44 year olds, white Londoners, AB Londoners and non-disabled Londoners
 - Of those who know what a QR code is, 36% have successfully scanned one, while 4% have tried unsuccessfully



Internet access

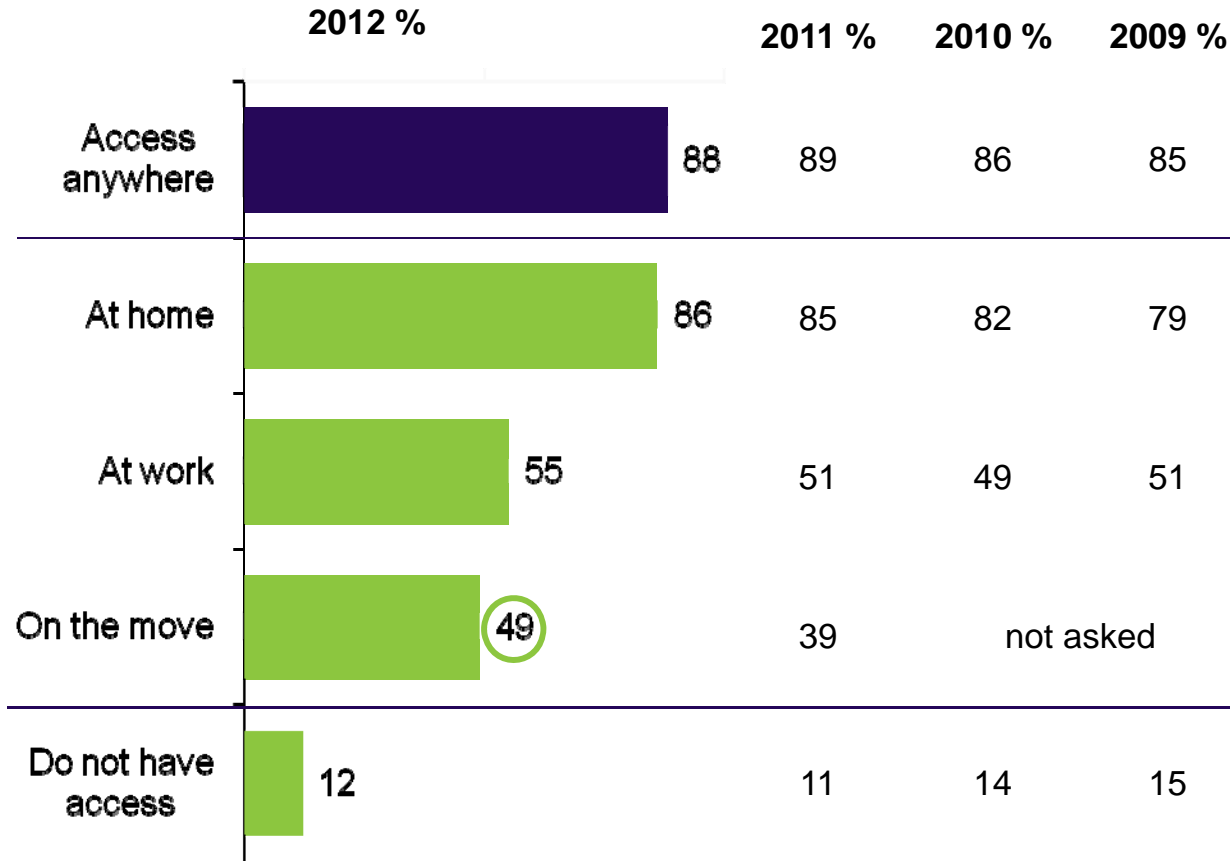




Internet access

Overall internet access seems to have reached a plateau

Now almost half of Londoners access the internet on the move



88% of Londoners that access the internet do so daily, up slightly from 85% on 2011

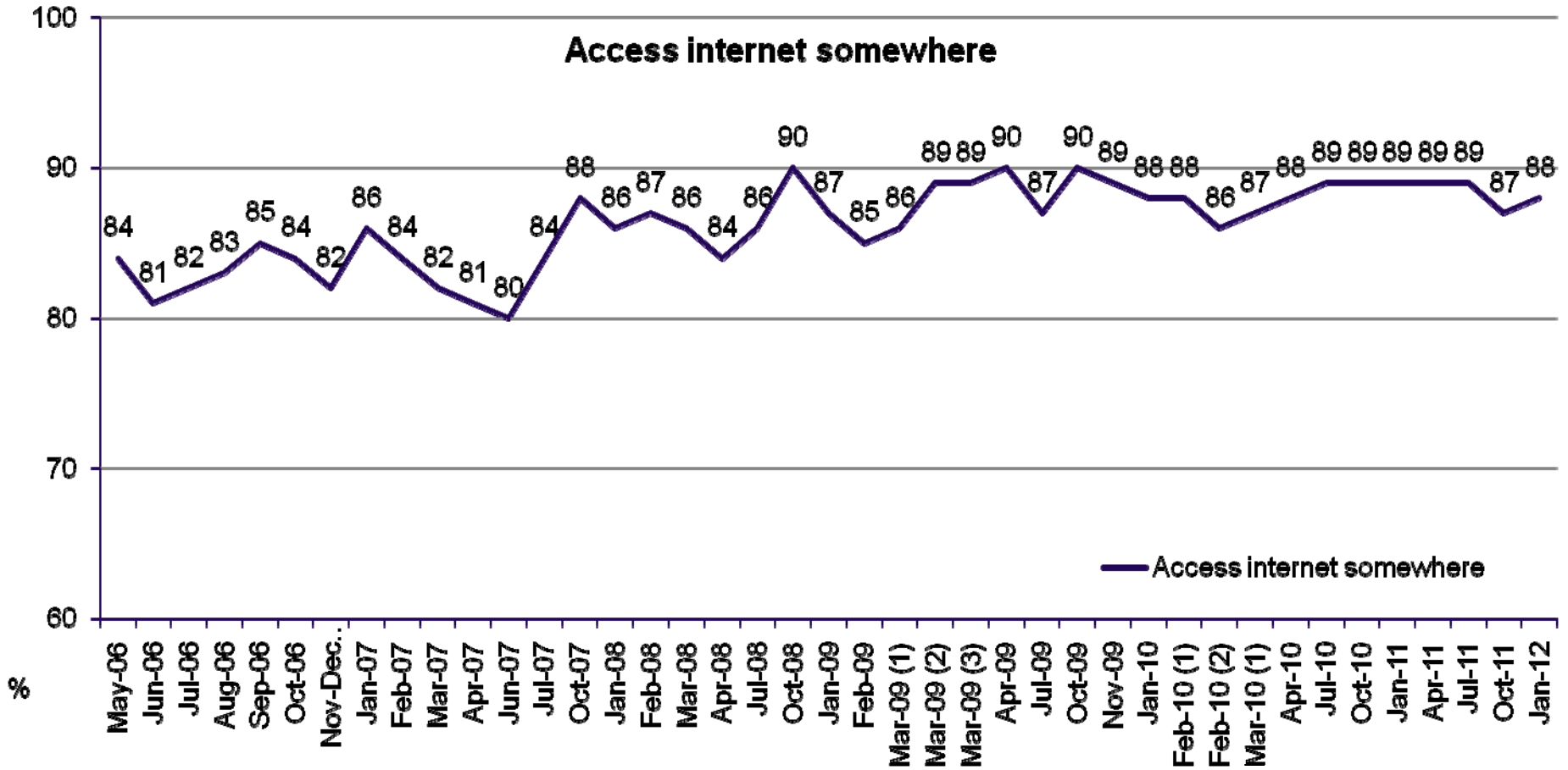
None say that they access the internet less than monthly

For comparison: ONS data shows London internet access for Q4 2011 was 87%

QINTER1 Do you access the internet...?
 Base: All (2012 1,000; 2011 1,002; 2010 1,000; 2009 1,005)
 EMU1a How often do you use the internet?
 Base: All with internet access (2012, 835; 2011 847)

→ Trend in internet access

Over the past four years, internet access has remained stable with around 90% of Londoners accessing the internet



QINTER1 Do you access the internet...?

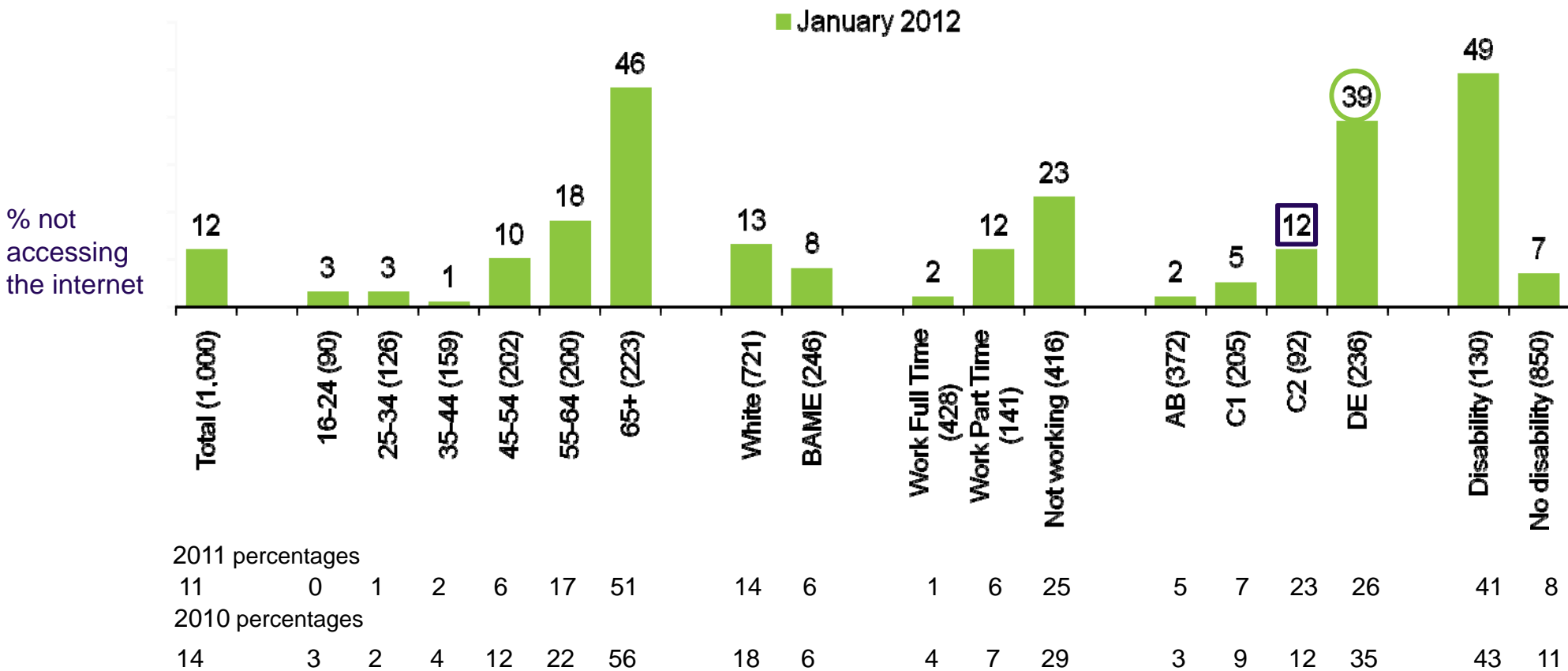
Base: All respondents (at least 1,000 per wave) – all surveys containing QINTER1



Profile of non-users of the internet

Older Londoners, those from DE socio-economic groups and disabled Londoners are much less likely to be internet users than other groups

That said, older Londoners are slightly more likely to use the internet than they were last year



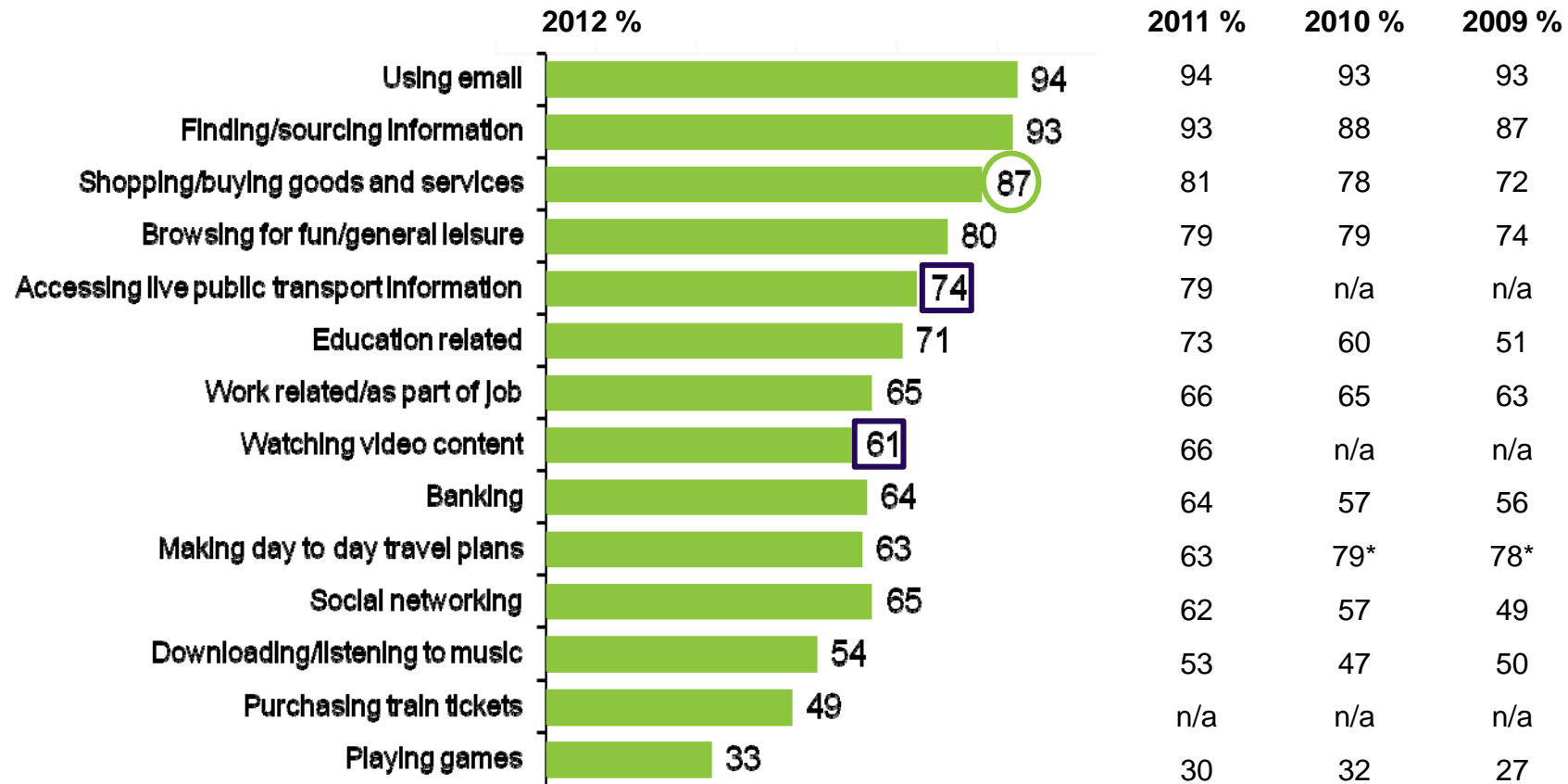
QINTER1 Do you access the internet...?
Base: All respondents



Internet activities

There is continuing growth in buying goods and services online – to almost 9 in 10 internet users

Three quarters (74%) of internet users check live public transport information (slightly down on 79% in 2011) and half (49%) buy train tickets online



* NB. in previous years this answer was making travel plans

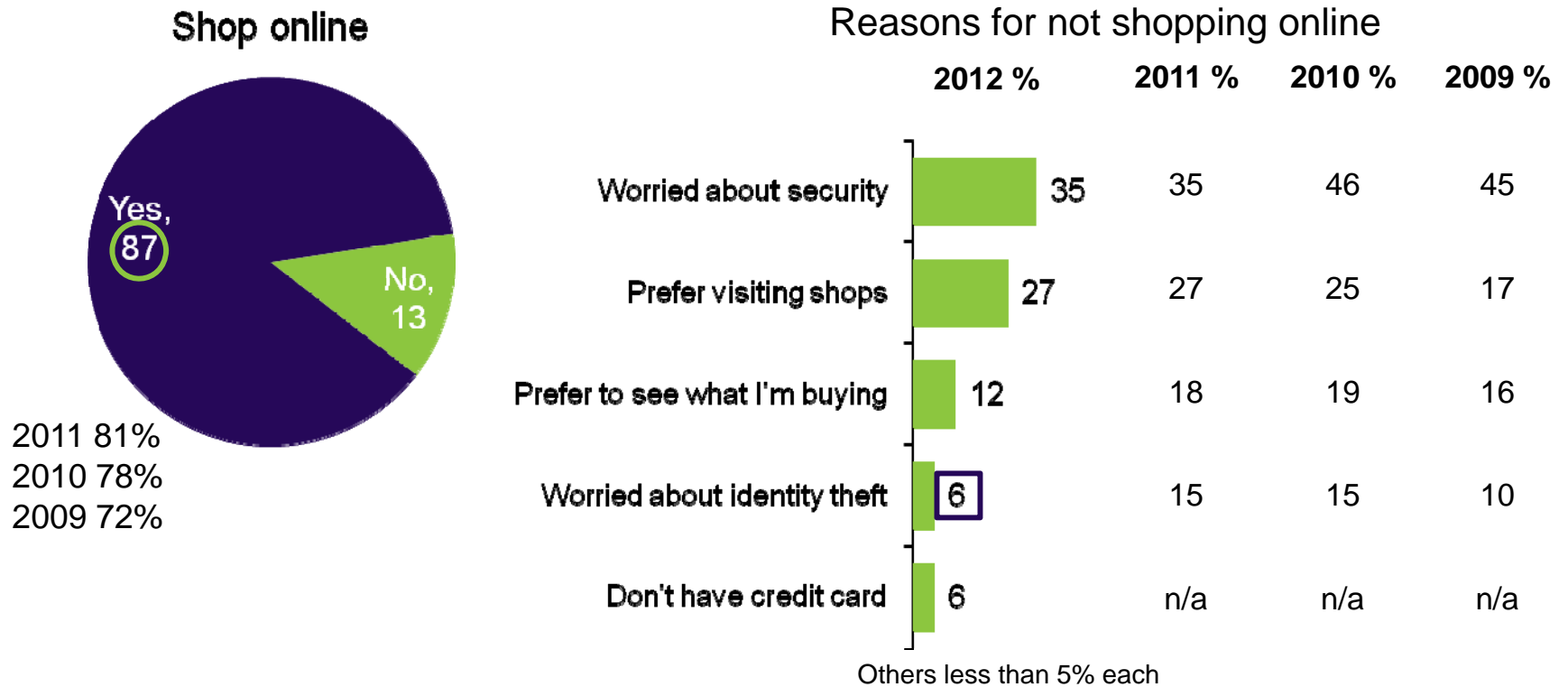
EMU3: You mentioned that you access the internet. Which of the following do you use the internet for?
Base: All with internet access (2012 883; 2011 841; 2010 803; 2009 847)



Buying goods online

Shopping online continues to increase in popularity amongst internet users

Amongst internet users who do not shop online, significantly fewer say their reason for not doing so is because of being worried about identity theft (compared to 2011)



EMU3: You mentioned that you access the internet. Which of the following do you use the internet for?
 Base: All with internet access (2012 883; 2011 841; 2010 803; 2009 847)

EMU4: You mentioned that you do not buy goods/services online. Why is that?
 Base: All who have internet access but have not bought anything online (2012 122; 2011 185; 2010 163; 2009 187)



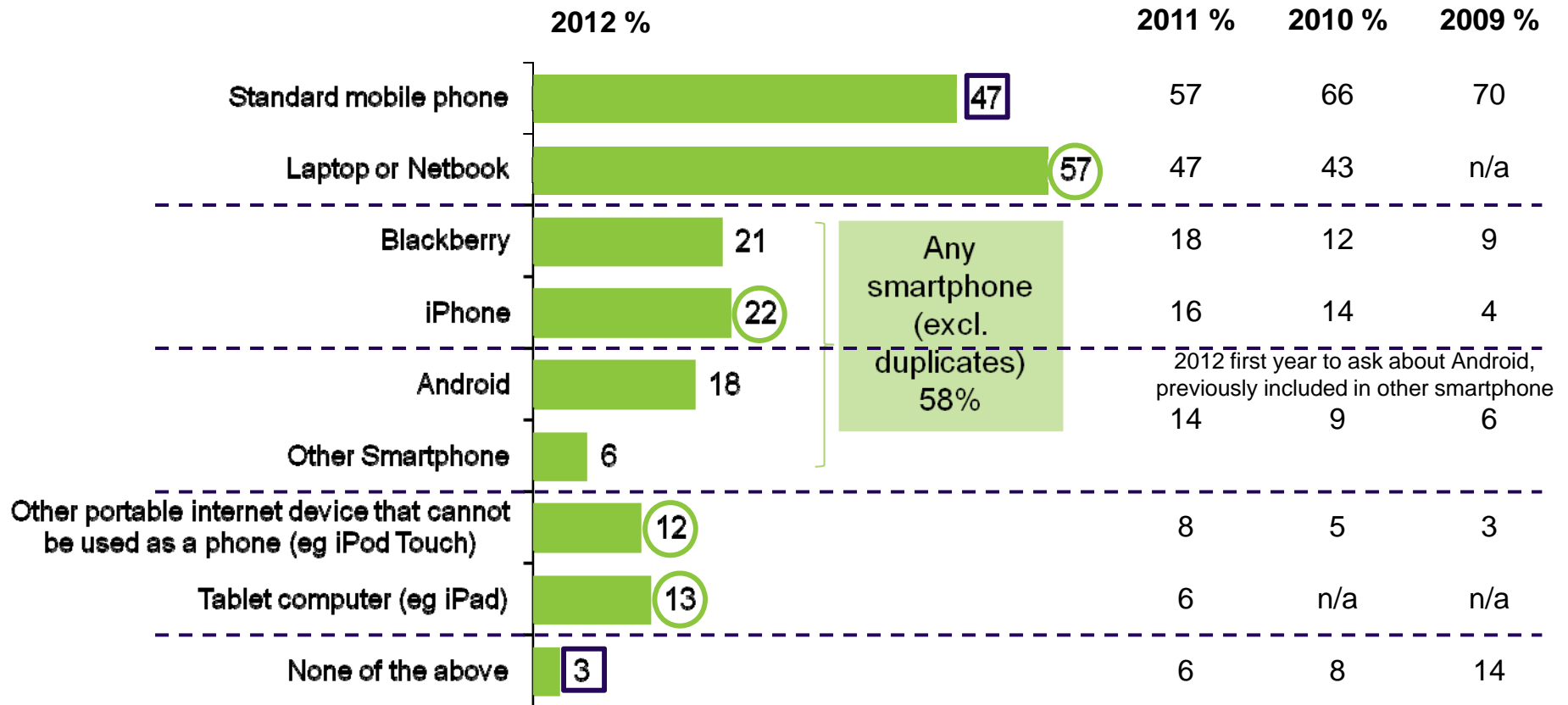
Internet access via mobile device



→ Mobile device ownership

Over half of Londoners (58%) now have a smartphone

Although owners of tablets are still in the minority, there are twice as many than a year ago



EMU6: Which, if any, of the following types of mobile phone or other mobile device do you use?

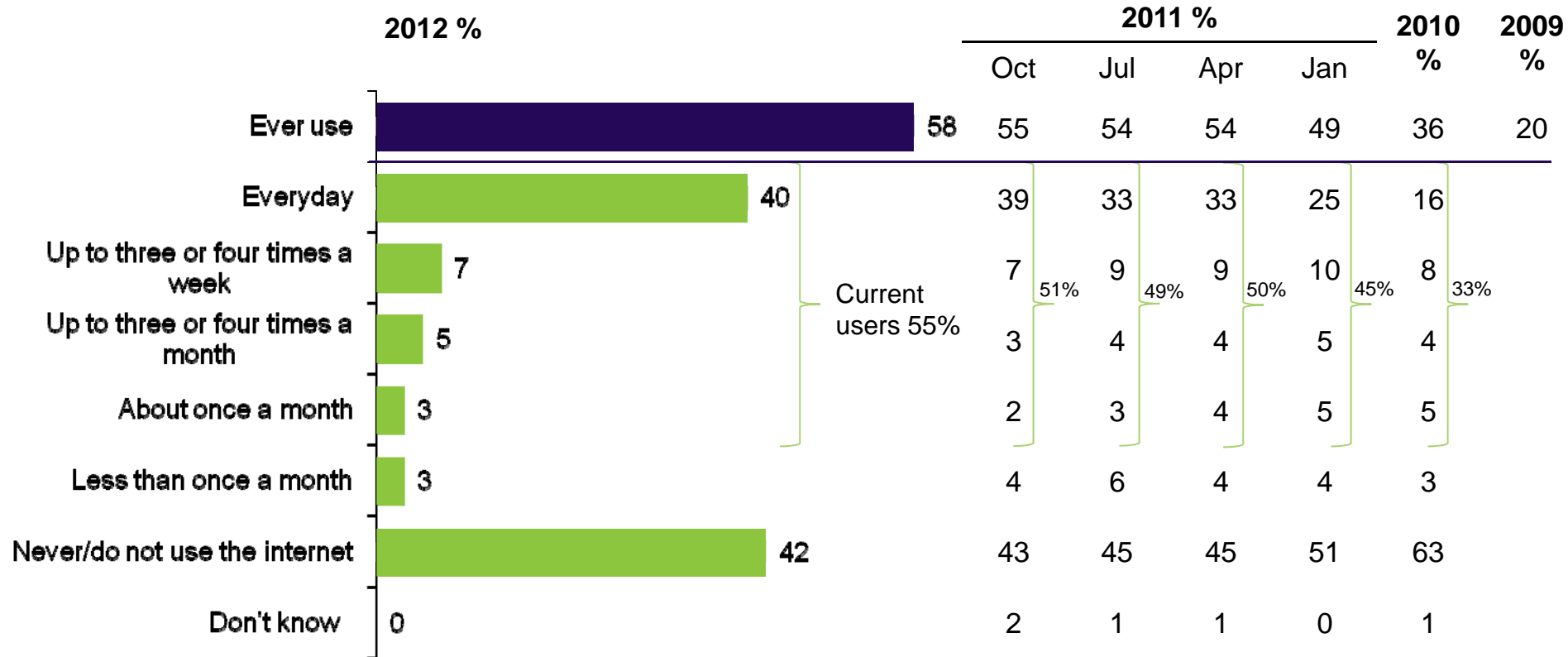
Base: All respondents (2012 1,000; 2011 1,002; 2010 1,000; 2009 1,005)



Internet access via a mobile device

Continued strong growth in Londoners accessing mobile internet and particularly in frequency of use

40% of Londoners access mobile internet every day



EMU7: Some mobile phones or devices come equipped with internet technology giving you the ability to, for example, send/read emails from your mobile device, browse the internet direct on your handset, download applications or games to your handset or pinpoint your location on a map using GPS.

Have you ever accessed the internet via your mobile device for any of these or other purposes?

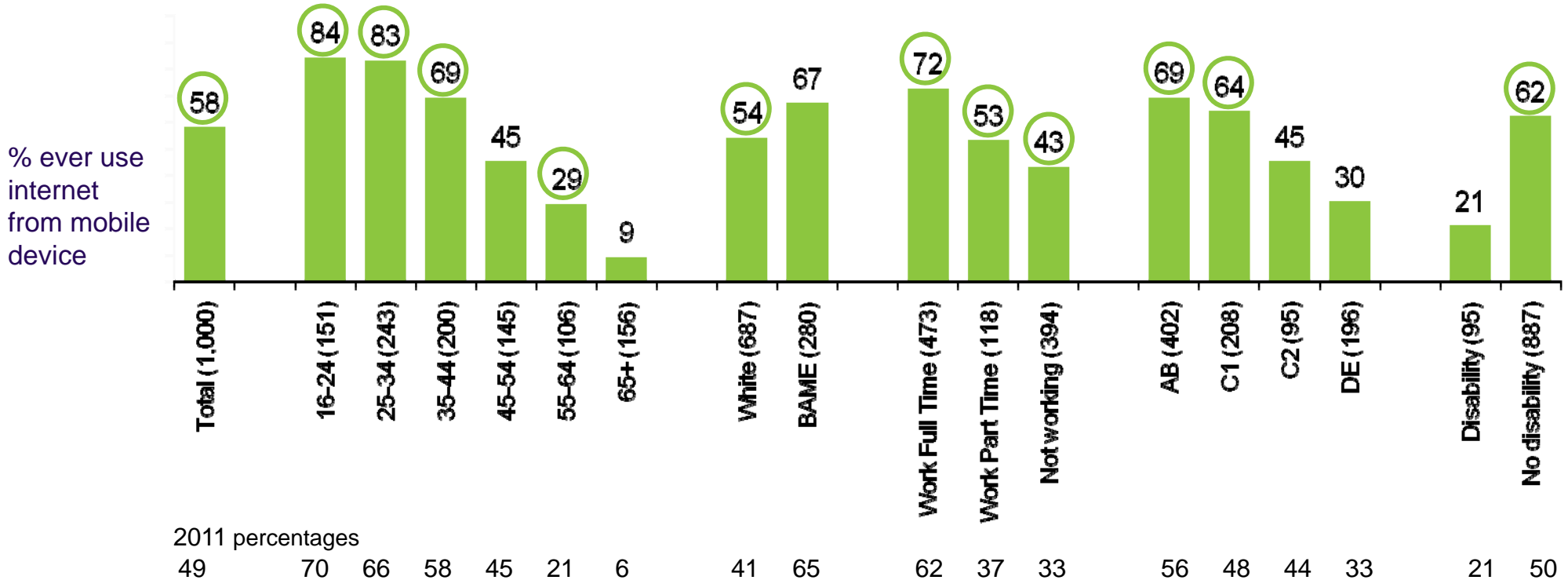
Base: All respondents (each wave c1,000)



Profile of mobile device internet users

Younger Londoners, those in full time work and those in the higher socio-economic groups are more likely to be mobile internet users

Use of mobile devices to access the internet has increased across almost all customer groups, except for C2DE Londoners and disabled Londoners where the picture has remained static



EMU7: Have you ever accessed the internet via your mobile device for any of these or other purposes?

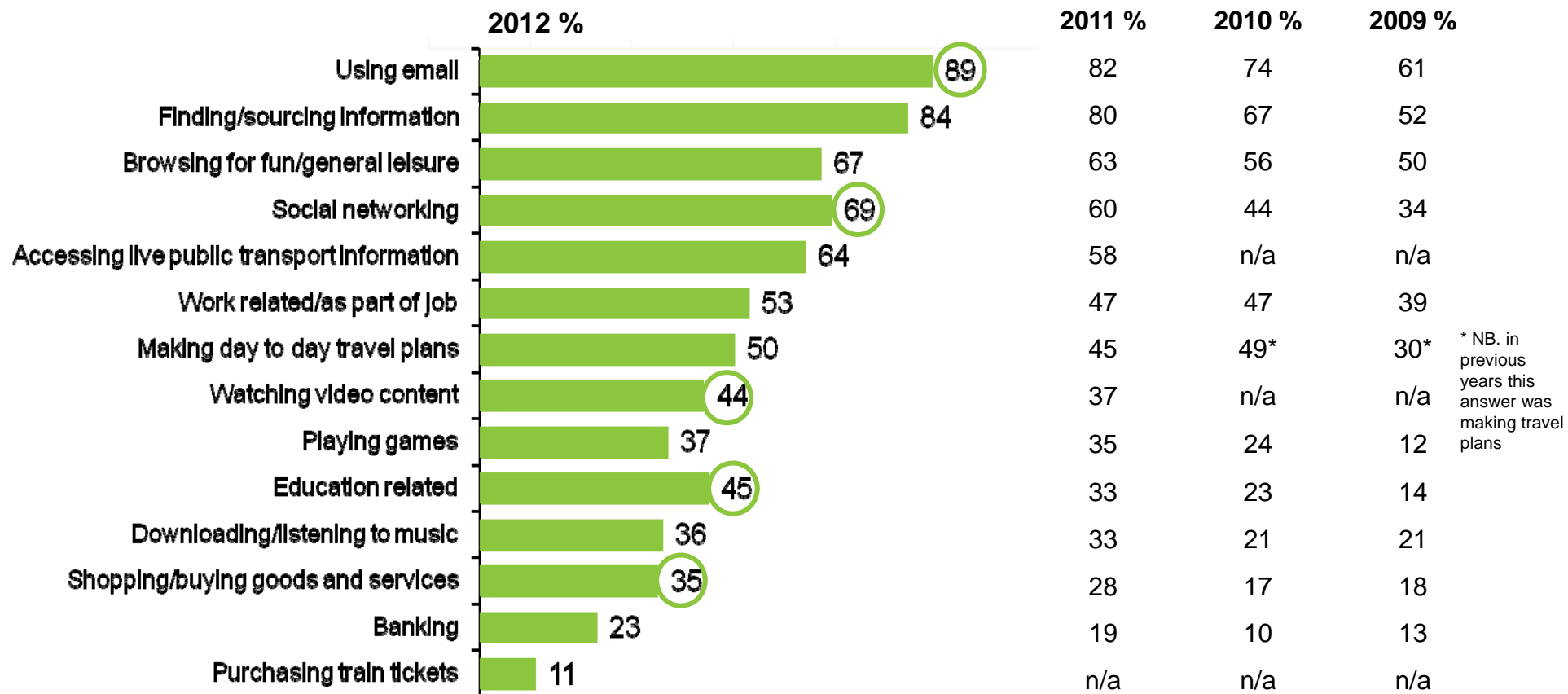
Base: All respondents



Activities accessed on mobile devices

Those accessing internet content via mobile devices are expanding their activities with more people undertaking all areas tracked

There has been a rise in accessing live public transport information via mobile devices, from 58% to 64% of mobile internet users; 11% purchase train tickets via mobile internet



* NB. in previous years this answer was making travel plans

EMU8: Which, if any, of the following internet activities have you carried out on your mobile phone or mobile device?

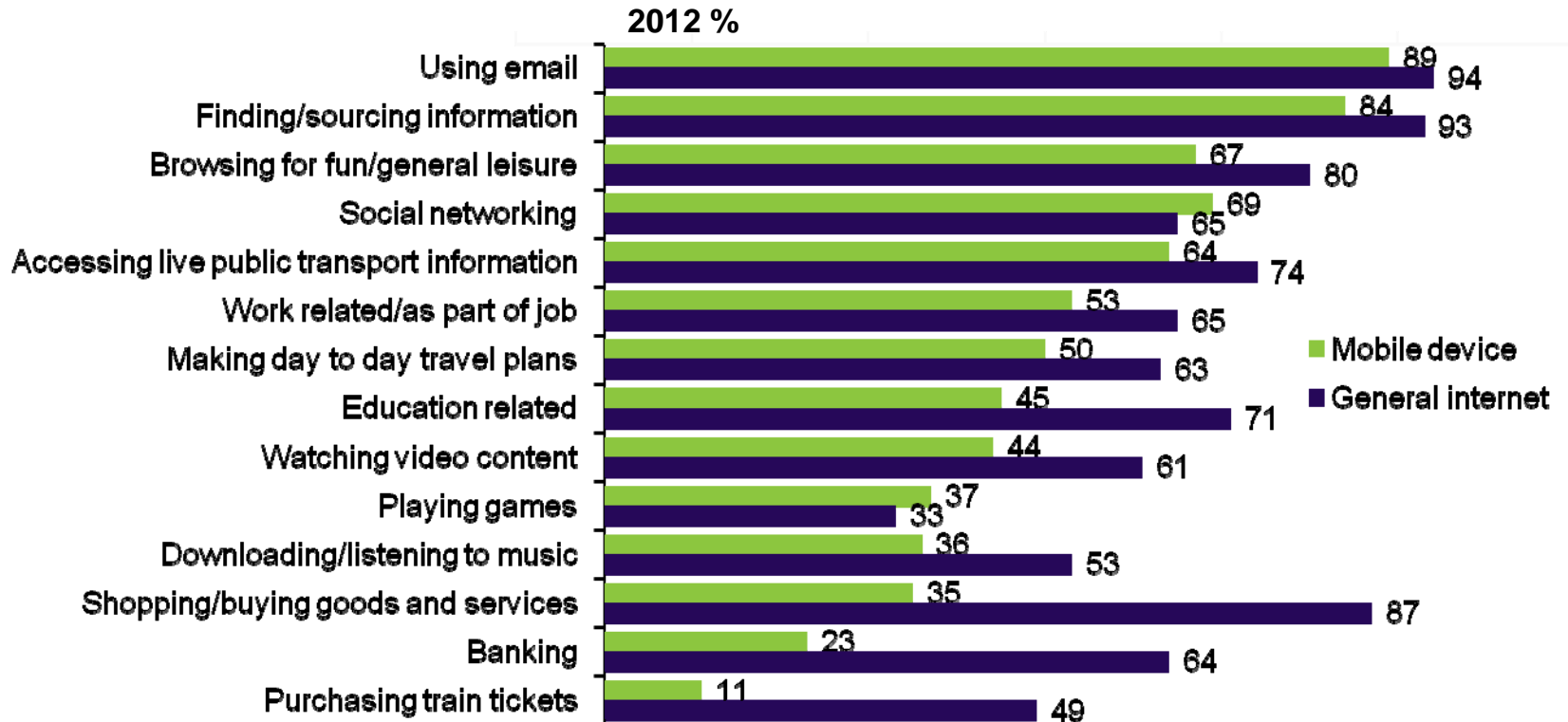
Base: All who use mobile phone or other portable internet device (2012 460; 2011 400; 2010 279; 2009 159)



Internet activities overall and via mobile

There remain clear differences in activities people generally undertake online and those which they would use a mobile device for

Shopping, banking and purchasing train tickets (in particular) are less common activities for mobile devices relative to internet overall



EMU8: Which, if any, of the following internet activities have you carried out on your mobile phone or mobile device?

Base: All who use mobile phone or other portable internet device (2012 580; 2011 400; 2010 279; 2009 159)

EMU3: You mentioned that you access the internet.

Which of the following do you use the internet for?

Base: All with internet access (2012 883; 2011 841; 2010 803; 2009 847)



Online banking

Most Londoners who use mobile devices for banking check their balance, while fewer make funds transfers or pay bills on their mobile device. In contrast, amongst those using general internet channels for banking, most complete a range of activities online



...via general internet

...via mobile devices

% of Londoners that bank online...	56%	14%
% of these that...		
check balances	96%	92%
make funds transfers	86%	58%
pay bills	79%	42%

EMU3b: You mentioned that you bank online, do you do any of the following online?

Base all banking online (503)

EMU8i: You mentioned that you bank using your mobile device, do you do any of the following using your mobile device?

Base: All respondents who use a mobile device for internet banking (97)



TfL website use

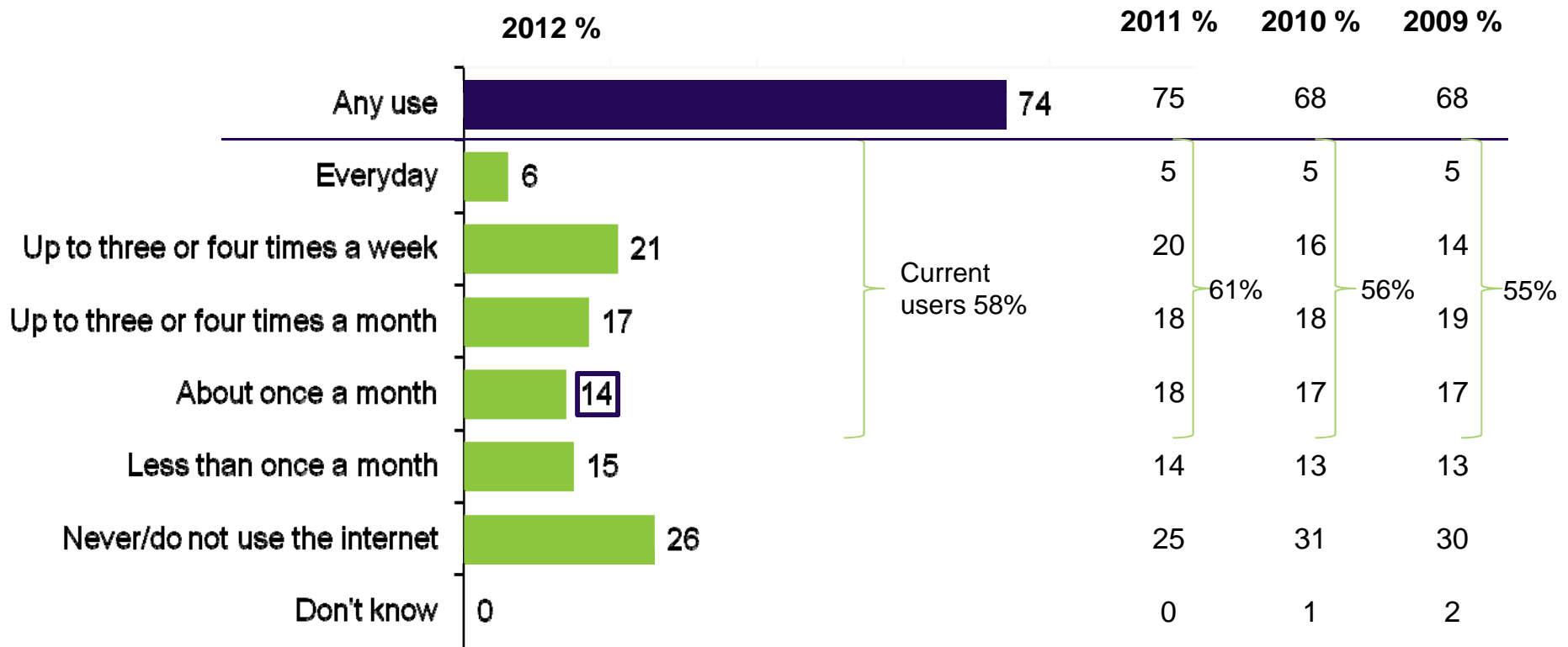




Use of TfL's website

Three quarters of Londoners use TfL's website

Frequency of use mirrors that observed in previous years



EMU5: How often do you use the TfL website, this includes the Journey Planner, Oyster and Congestion Charging websites and through any device (a computer/mobile phone) etc?

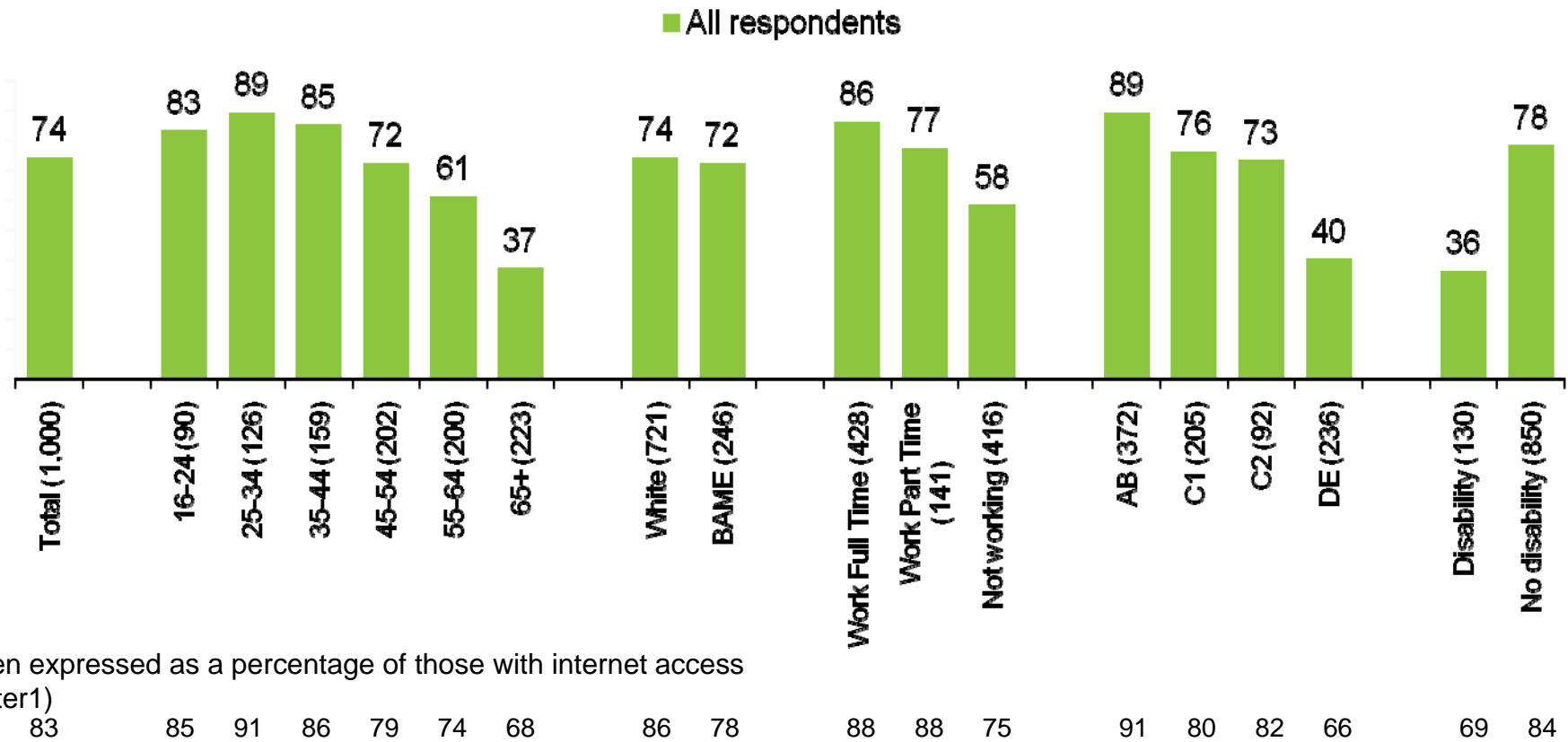
Base: All respondents (2012 1,000; 2011 1,002; 2010 1,000; 2009 1,005)



Profile of TfL website users

TfL's website is very commonly used by Londoners across all customer groups, especially when you account for varying levels of internet access

As seen in relation to other trends in this research, DEs, non-working and disabled Londoners are less likely to use TfL's website, even when accounting for their lower than average internet access



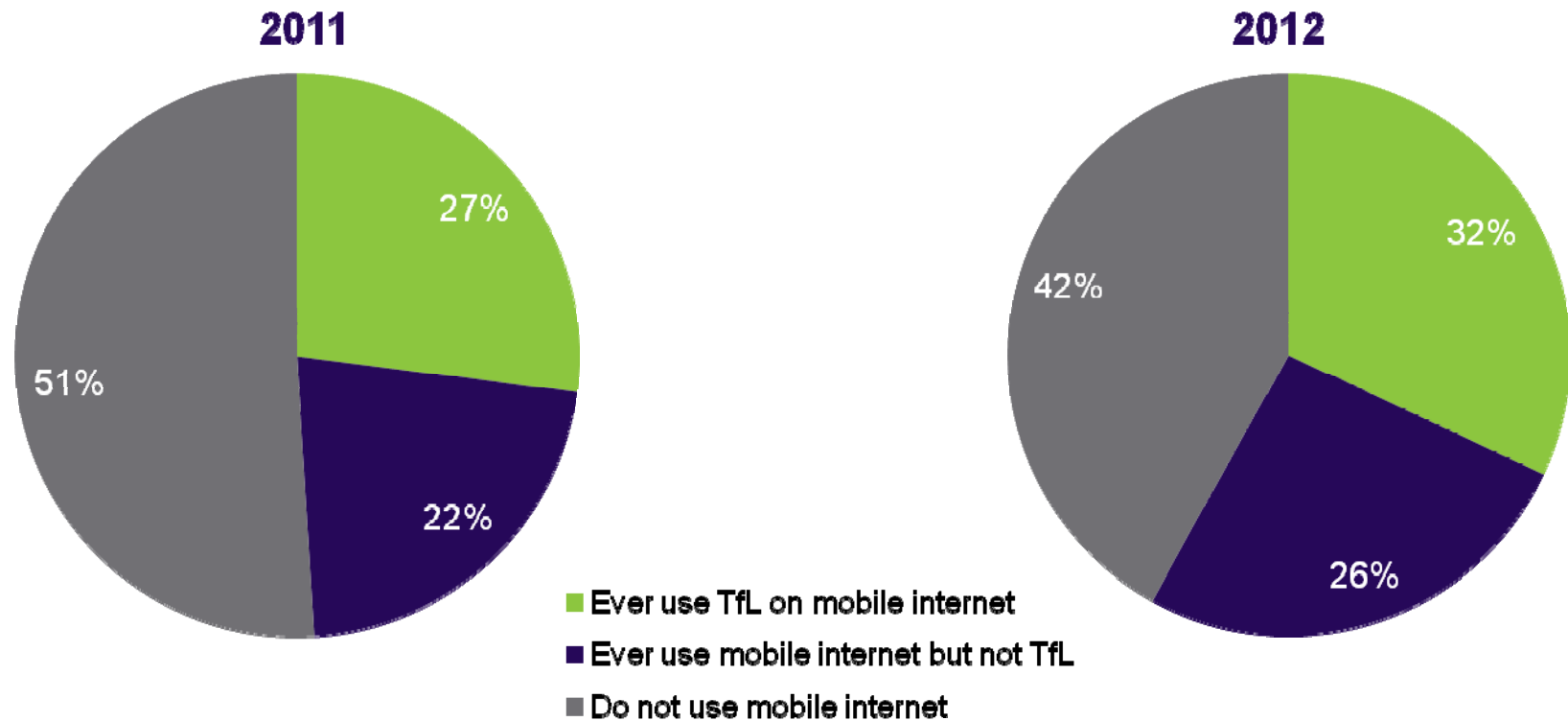
EMU5: How often do you use the TfL website, this includes the Journey Planner, Oyster and Congestion Charging websites and through any device (a computer/mobile phone) etc?

Base: Londoners



TfL website via mobile device

The proportion of Londoners using TfL's website via mobile has increased to 32% in 2012



EMU9a: How often, if at all, do you use TfL's website on your mobile device?

Base: All (1,000)

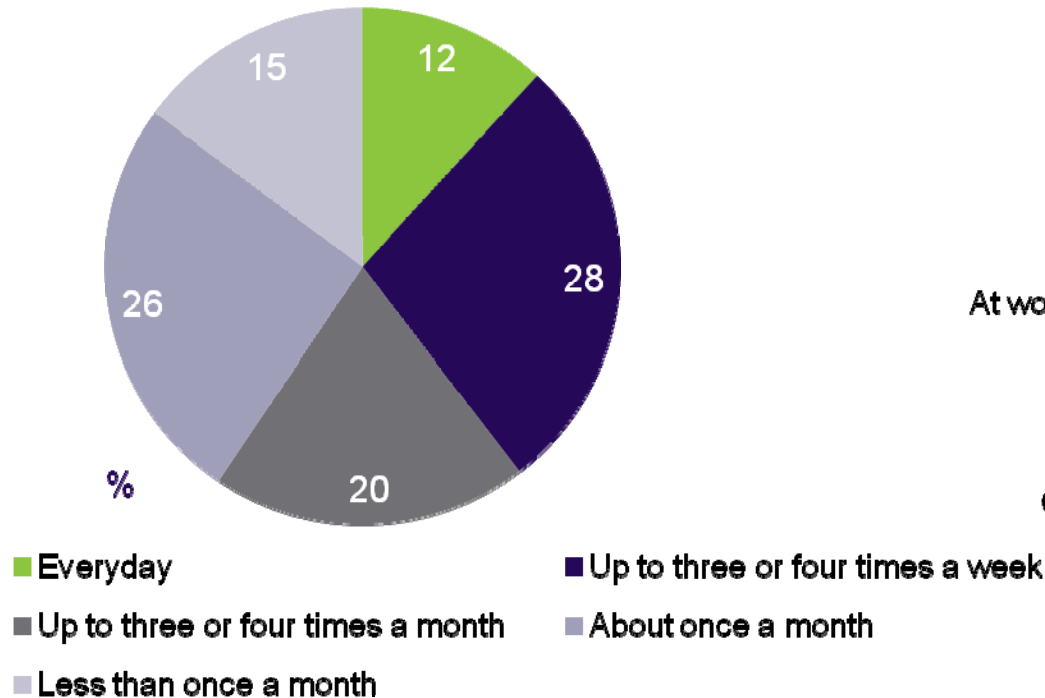


Accessing TfL's website from a mobile device

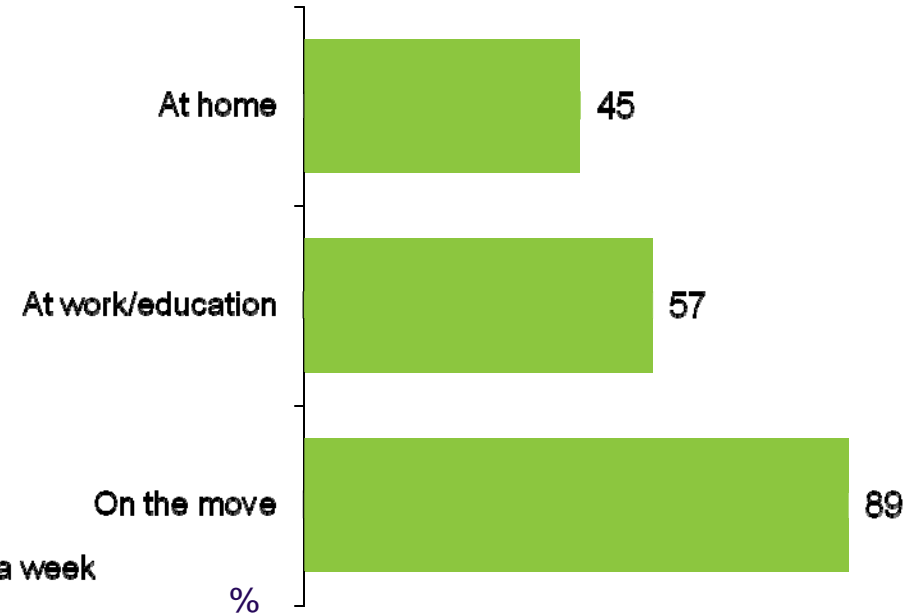
40% of those accessing TfL's website from a mobile device do so at least three or four times a week

Location of access is quite diverse: although most users access TfL's website from a mobile device when on the move, substantial proportions also do so at home and from work/education

Frequency of access amongst users



Where access TfL from on mobile device



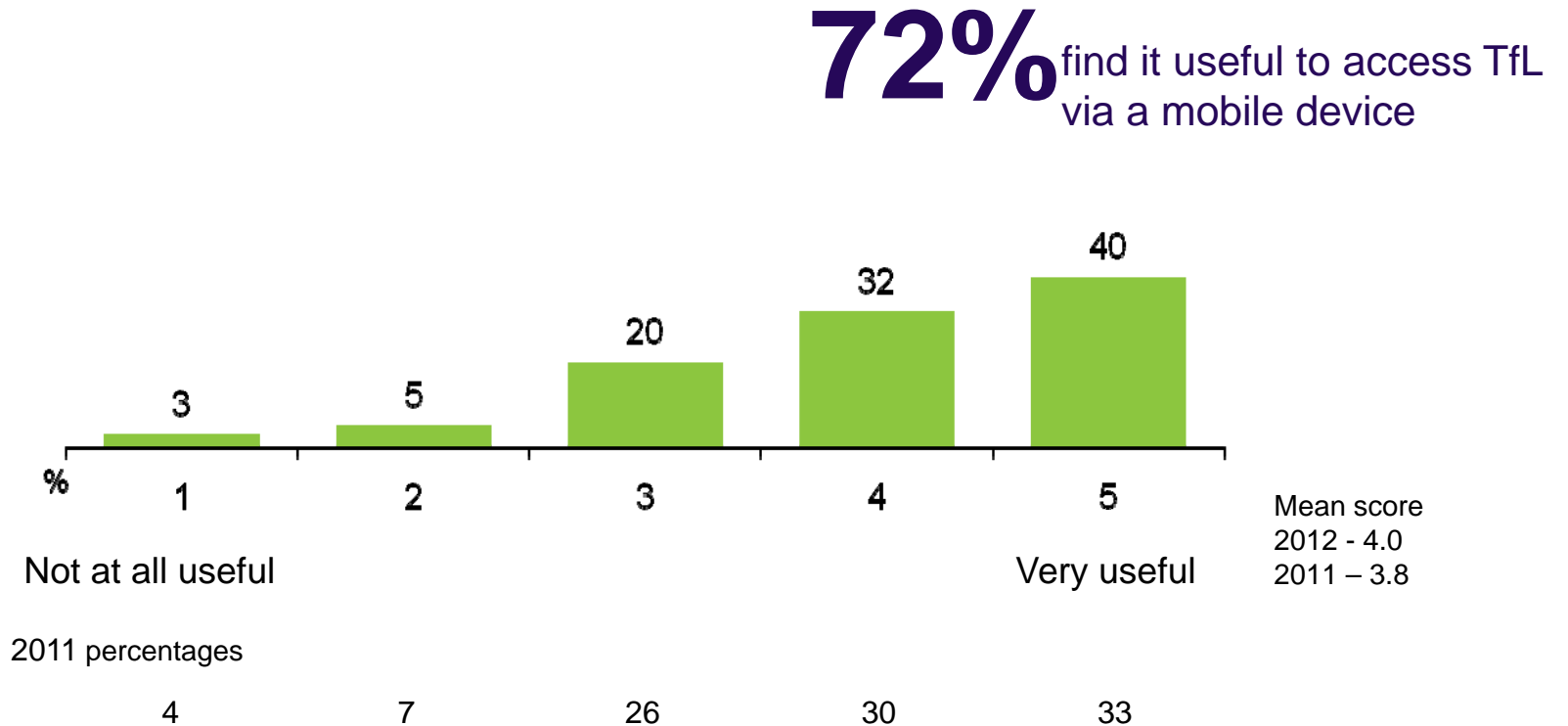
EMU9a: How often, if at all, do you use TfL's website on your mobile device? Base: All who use mobile phone or other portable internet device
EMU9c: Do you access TfL's website on your mobile device when you are... Base: All that access TfL's website on mobile device (240)



Usefulness of accessing TfL's website via mobile

Almost three quarters of Londoners that access TfL on a mobile device find it useful, (40% say it is 'very useful')

There has also been a slight increase in usefulness observed by Londoners since last year



EMU9b: And how useful do you find it to access TfL's website on your mobile device?
BASE: All that access TfL on mobile device (excluding don't knows) (2012 240; 2011 215)



Journey information services

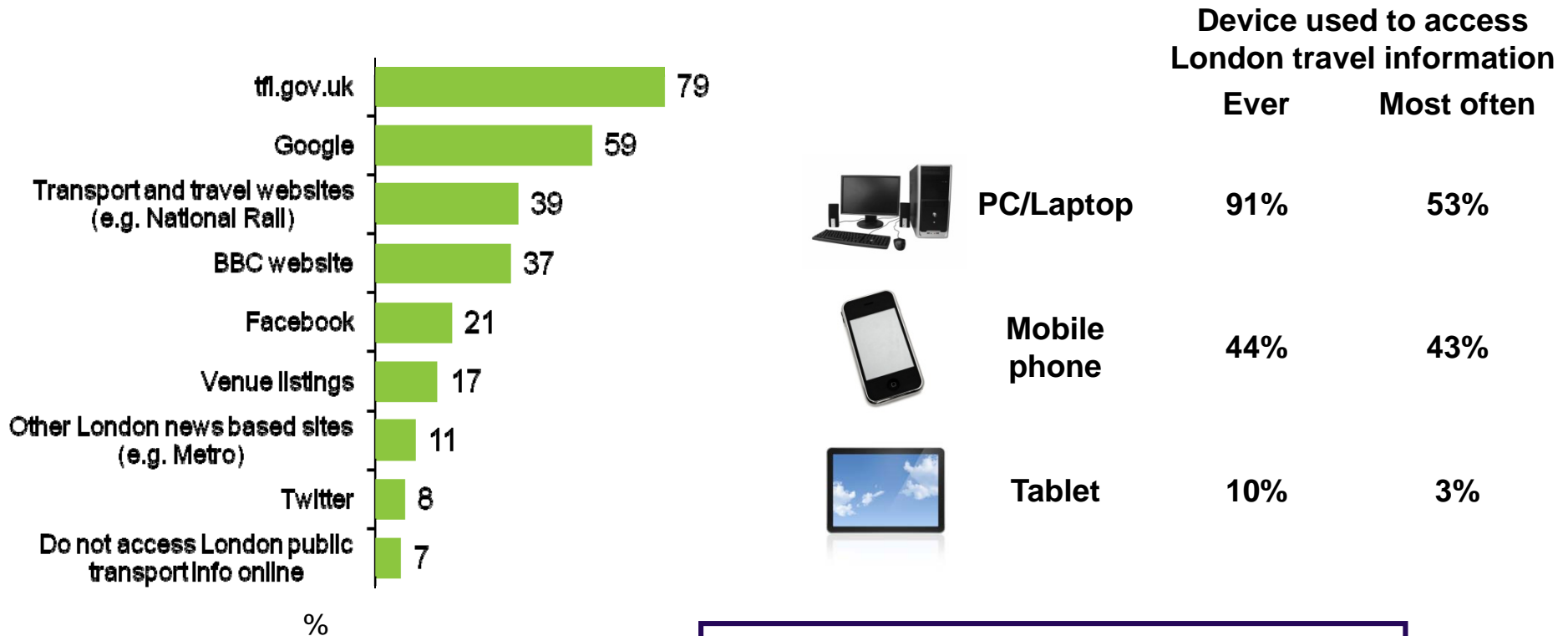




Comparative position of tfl.gov.uk

TfL's website continues to lead the way in terms of providing London travel information

PCs and laptops remain are by far the most commonly used devices for this type of information



This year, options were read to respondents meaning that results are not comparable with previous waves

EMU12: Which online sources of information do you use to access London travel information?

Base: All who have access/use the internet or who use mobile phone/other portable internet device (837)

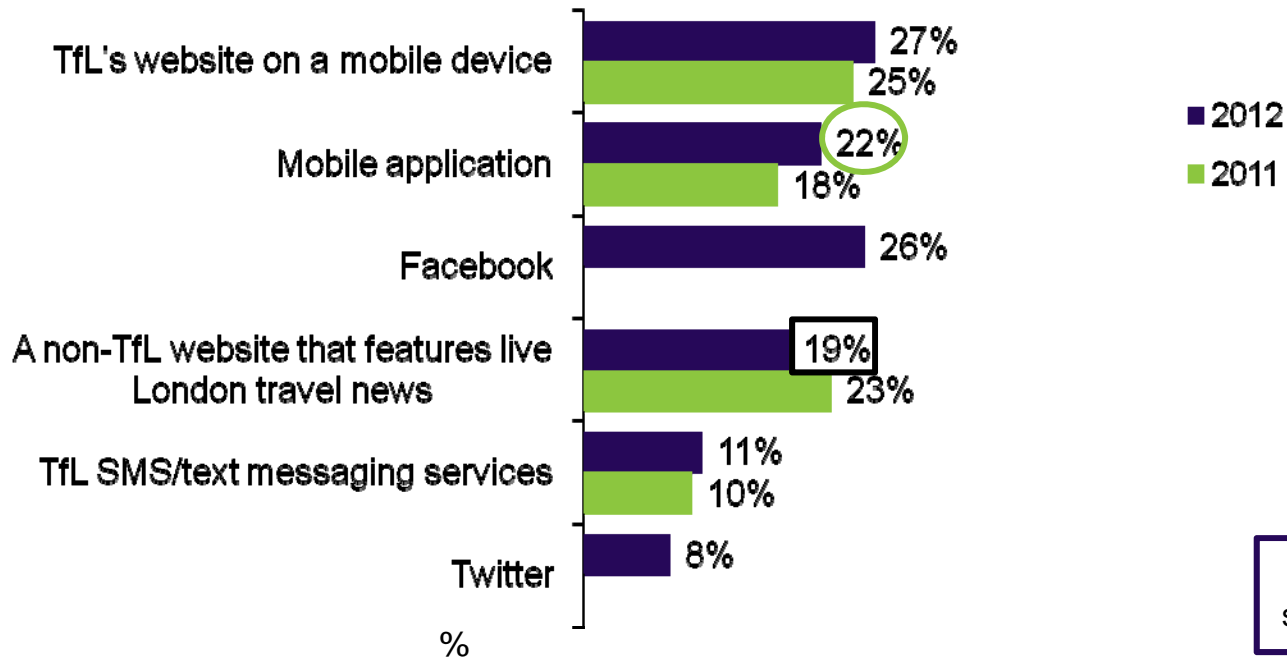


Use of online sources to find out about problems and delays during journeys

There has been growth in Londoners using mobile apps to check on problems and delays during journeys, and a fall in users of non-TfL websites

TfL's website and Facebook are the most commonly mentioned online sources for Londoners for finding out about problems and delays during journeys

Use of digital media for checking London travel information during journeys



EMU11: Thinking about the various means of obtaining information about problems or delays encountered during your journey in London, do you use...

Base All respondents (1,000)

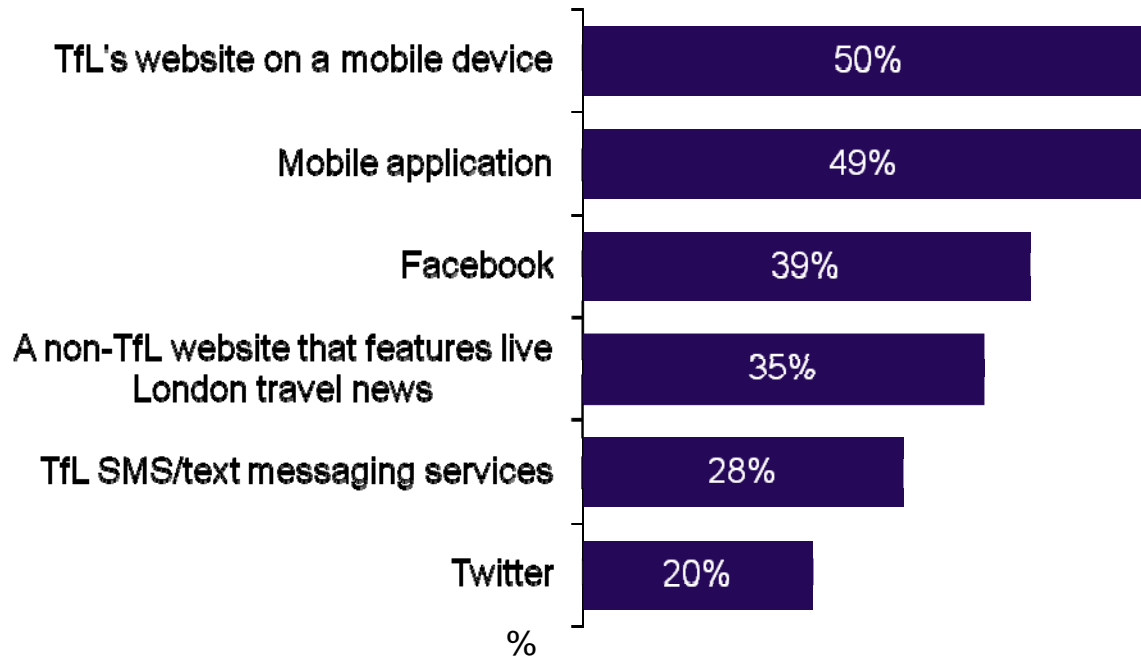


Likely use of online information sources relating to problems and delays during journeys

Half of Londoners say they would use TfL's website on a mobile device to find out about problems and delays during journeys

Nearly as many said they would use a mobile application (49%) while use of Twitter is not yet as strongly developed, mentioned by 20% of Londoners.

Likely use of online information sources relating to problems and delays



“Likely to use” was only asked of non-users in 2011 and therefore comparison with 2012 is not possible

EMU11b: Are you likely to use... In the future?
Base All respondents (1,000)



Social media

Using social media to discuss London travel is still a minority activity

Facebook is the most commonly mentioned medium for those that do

Only **8%** use social media to discuss day to day London travel or transport related issues?



Note: TfL's regular social media monitoring highlights a large number of content generated on Twitter relating to TfL – however it is not possible to monitor Facebook users without prior permission from each user

→ Taxi and private hire Apps

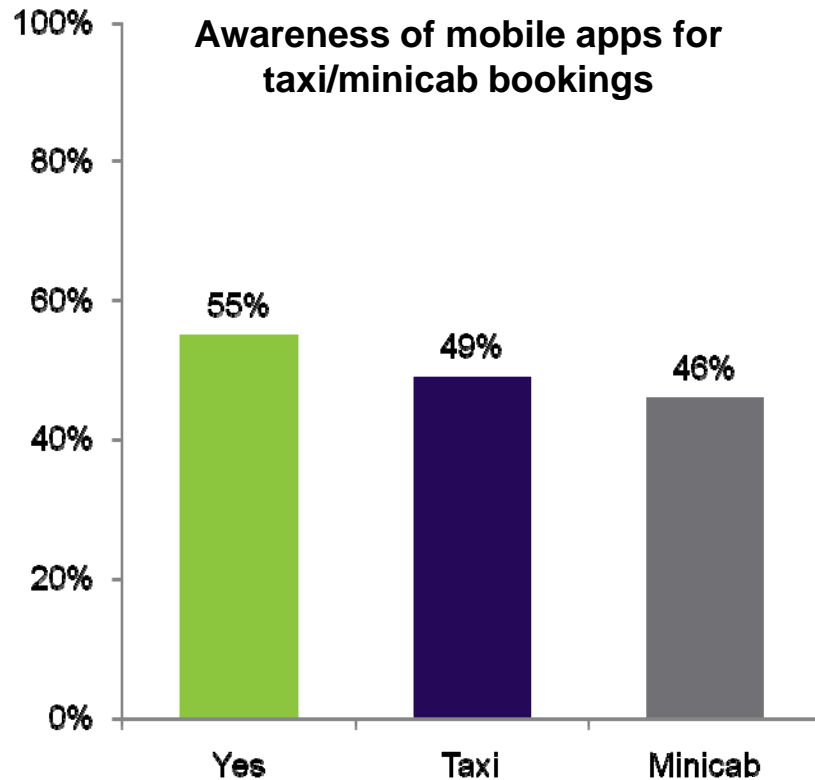




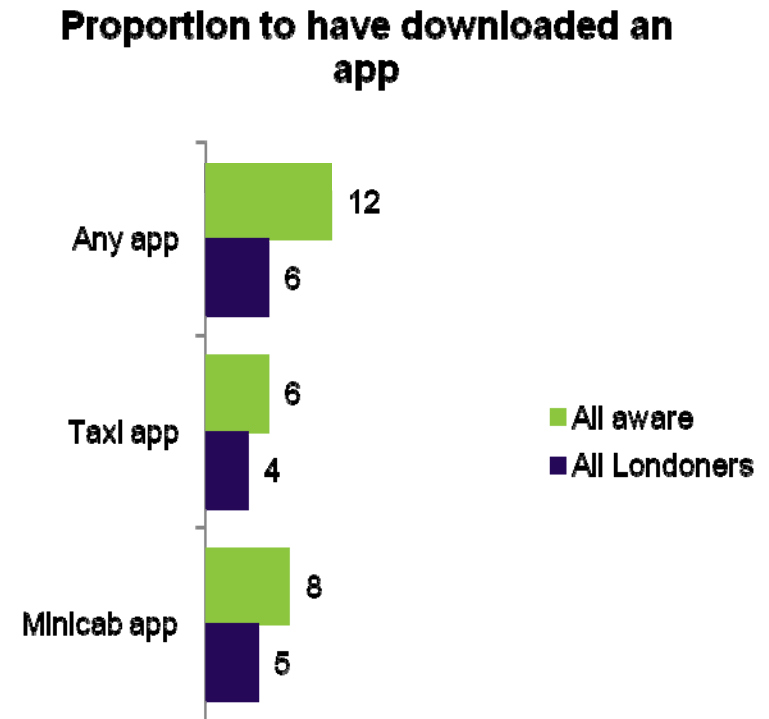
Awareness of TPH apps and proportion of Londoners to have downloaded one

More than half of Londoners are aware of TPH apps

However, the proportion of Londoners downloading these apps is relatively low



TPH1: Are you aware that there are mobile Apps which allow you to book taxis or minicabs in London? (base 1,000)



TPH2: Have you ever downloaded an App which would allow you to book taxis or minicabs? (base 507)



Use and non-use of TPH apps

Of those who have downloaded an app, Addison Lee is the most common; fewer than half of those with an app have used it to make a booking

However, there are few identified obstacles to use – many Londoners just haven't needed to – and those who have used the services have generally found it easy and been satisfied

Most popular apps (% of those downloading any app)



Addison Lee
37%



Cabbie
27%



Cab:app
6%



HailO
5%

40% of those with app downloaded have made a booking (3% of all Londoners)

12% a taxi app

33% a minicab app

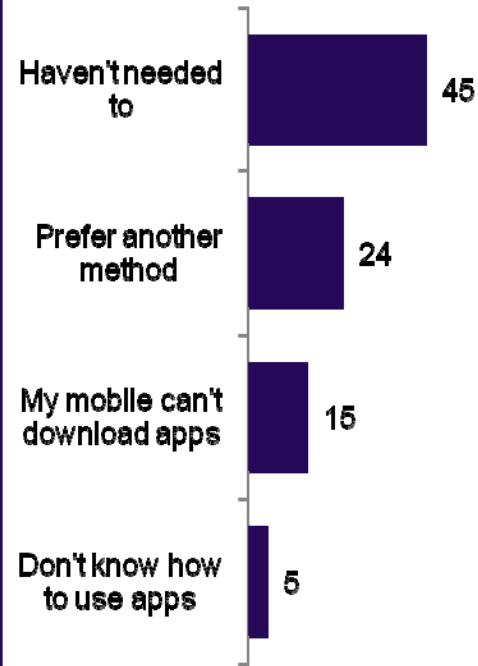
- Of these (15 people), 12 gave a satisfaction rating of 8-10 out of 10, 1 between 5-7, and 2 between 0-4
- 14 out of 15 found it 'quite easy' or 'very easy' to use

TPH2a: Which Apps have you downloaded? (base 40)

TPH3: Have you actually booked a taxi or minicab through an App? (base 40)

TPH4a/c: how satisfied are you with booking taxis or minicabs via a mobile App? / how easy is it to use a mobile App to book taxis or minicabs? (base 15)

Reasons for not using App to book taxi or minicab



TPH4: Why haven't you booked a taxi or minicab through an App? (base 492)

→ Next bus arrival service

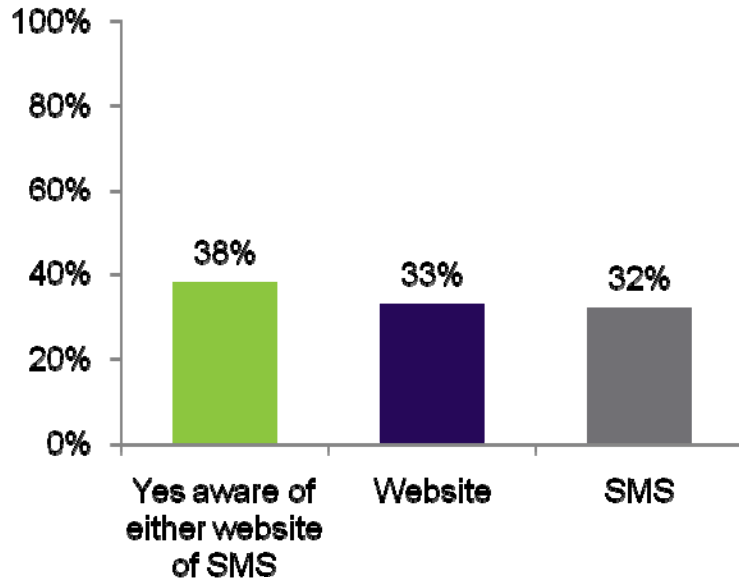


→ Next bus arrival service

Around a third of Londoners are aware of the next bus arrival service

Use of the website and SMS messaging to gain real time travel information for buses is still low compared to use of TfL's website overall; the main reason for lack of use is 'no need'

Awareness of next bus arrival service



Website

40% of those aware have used (13% of Londoners)

Top reasons among those that don't use:

- Not had need to use (32% of those aware but not used)
- Buses run regularly anyway (9%)
- Don't have access to the internet (8%)
- Don't use buses (7%)
- Bus stops already have countdown (7%)

SMS

16% of those aware have used (5% of Londoners)

Top reasons among those that don't use:

- Not had need to use (33% of those aware but not used)
- Prefer to use the website (9%)
- Cost issues (9%)
- Not interested (7%)

iBUS1: Transport for London offers up-to-the-minute bus information where you can find out the times of the next buses at specific bus stops by looking at the TfL website, or by texting the number of the bus stop to TfL. Were you aware of those two services? (base 1,000)

iBUS2: Have you ever used this service? (base 319)

iBUS3: Why have you not used the service? (base 209)



QR codes

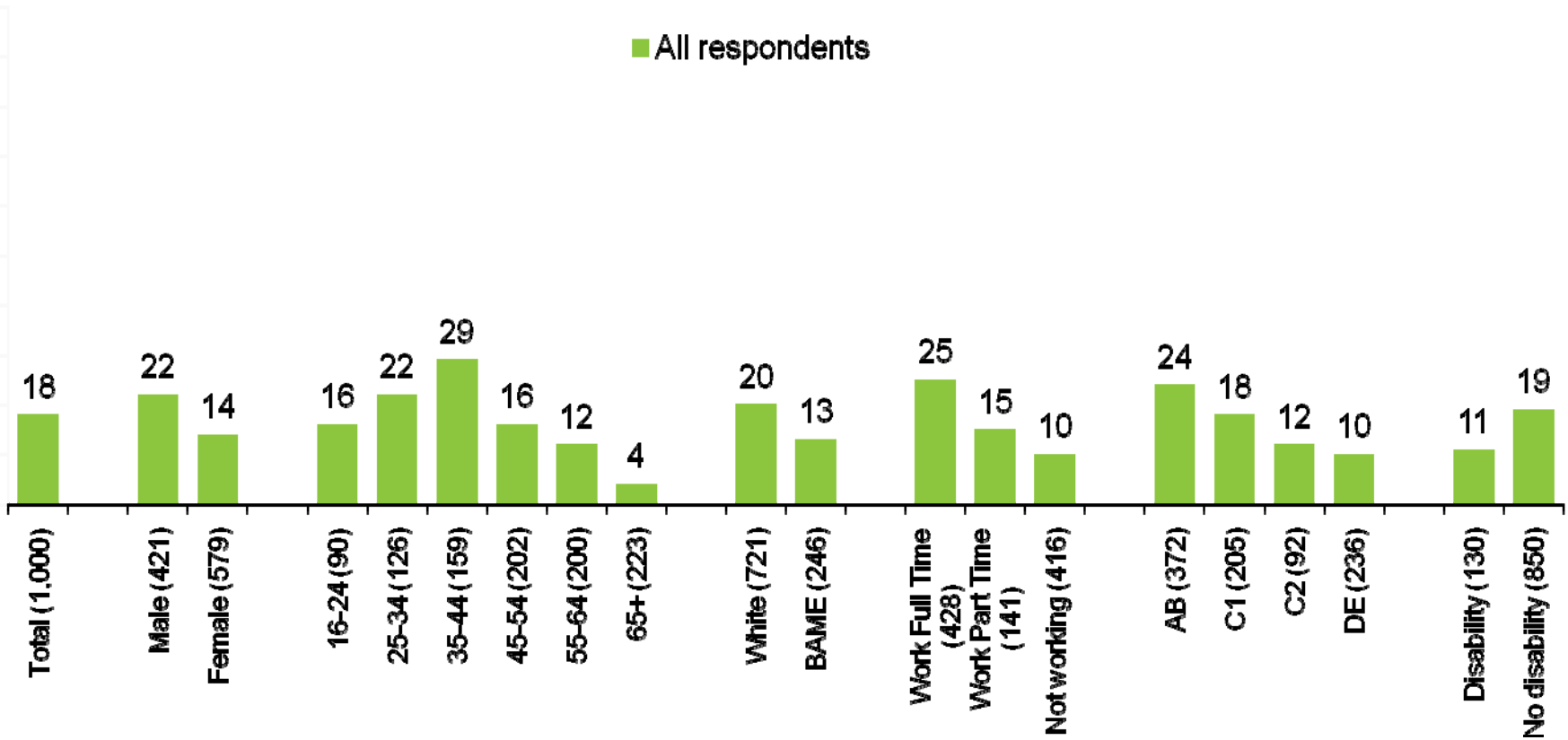




Understanding of QR codes

18% of Londoners as a whole know what QR codes are; however there are large variations according to demographics

36% of those aware of QR codes have scanned one successfully (and 4% have tried but couldn't do it)



EMU8a: Do you know what a QR code is? Base: all (1,000)

EMU8b: Have you ever scanned a QR code on your mobile phone? Base: who know what QR codes are (150)



Appendix





Appendix

Methodology

- The research comprised 1,000 interviews with Londoners (living in a London borough)
- The survey took place over the telephone and used the “next birthday rule” such that interviewers asked to speak to the person over the age of 16 in the household who celebrates their birthday next
- A random sample of London landlines was used to conduct the research
- Interviewing took place between 12th and 31st January 2012
- The specific questions relating to Digital Media Monitor were appended to the regularly conducted ‘Oyster Tracker’ study
- The final data set are weighted back to be representative of Londoners in terms of age, gender, inner/outer London, ethnicity and working status according to 2001 census data