Transport for London

future thinking

Digital and Social Media
Monitor – Spring 2016
TfL number: 15239
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V2.0

Contents

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Objectives

Understand digital media use of Londoners

- To explore how Londoners use digital media to plan and make journeys. More specifically to try to understand:
  - How and when Londoners access digital travel and journey planning information
  - Devices used and how this varies between tasks
  - Different types of users and how their information and digital needs vary
  - Use of journey planning apps and how these fulfil different information needs
  - How people use TfL's digital services, before and while travelling

Methodology

- 1,192 online interviews with Londoners (representative of adults aged 16+)

- Fieldwork completed March 2016

- Data weighted to be representative of Londoners in terms of age, gender, inner/outer London, ethnicity and working status according to 2011 census data

- Please note:
  - In Autumn 2015 the questionnaire was revised so the majority of data is not comparable prior to that – time series data will continue to build over future waves
  - This was historically a telephone survey but has now moved online. A parallel run of telephone and online took place in Spring 2015 and the first full online wave took place in Autumn 2015

Data in this report was captured via an online survey and hence all participants have online access. Data collected by TfL in March 2015 showed 91 per cent of Londoners had internet access – data on slide eight has been rebased on all Londoners, all other slides are based on online Londoners

Key Headlines

Key Headlines

The internet continues to be used for <u>London travel information</u> by almost all online Londoners, with the majority also accessing through mobile devices

<u>Travel apps</u> were used by just under half of online Londoners for London travel information and to a lesser extent social media was used too (used by one in five)

<u>TfL website use</u> was slightly higher than in Autumn 15 and the experience continued to be rated well (in line with Autumn 15)

The <u>information</u>, the <u>tools provided</u> and <u>ease of use</u> were key triggers for high satisfaction with the TfL website

A <u>mix of information sources are still required</u>; almost one in ten Londoners do not use the internet and older online Londoners use of digital media continues to be lower

Summary

Most Londoners use the internet on a daily basis. The majority use the internet for travel purposes and a high level access the TfL website

Key figures rebased on all Londoners

91% *of Londoners have internet access (According to data collected by TfL, in March 2015)*

Ever access the internet

91%

At home
91% (88% daily)

On the Move
72% (46% daily)

At work
59% (50% daily)

86% ever use the internet for travel purposes
- Maps & directions (82%)
- Live public transport information (73%)
- Making day to day travel plans (66%)

..and **67%** ever access the internet for travel purposes through a mobile device

81% access through a mobile device (70% daily)
Mobile device users defined as smartphone, tablet, standard mobile or wearable device users

Main devices used:
- **73%** use a smartphone
- **58%** use a tablet

83% ever use the TfL website

22% use the TfL website daily

42% use apps for travel in London

18% use social media in relation to travel in London

Other online TfL sources used
- TfL email (48% have received)
- TfL's Twitter feed (18% ever use)

Internet usage is an integral part of daily life, including access through mobile devices. However, over 55s were again significantly less likely to use mobile devices

Internet access and device usage

⬆ = *Significant increase vs. Autumn 15 at a 95% confidence level*

⬇ = *Significant decrease vs. Autumn 15 at a 95% confidence level*

Almost <u>all internet</u> users access on a daily basis

99%

At home
100% (97% daily)

On the Move
79% (51% daily)

At work
65% (55% daily)

Data in this report is captured via an online survey and hence all participants have online access. Recent data collected by TfL (March 2015) showed 91% of Londoners had internet access

89% access through a mobile device (77% daily)

Mobile device users defined as smartphone, tablet, standard mobile or wearable device users

Devices used:
- **80%** use a smartphone
- **64%** use a tablet

Older online Londoners are least likely to use mobile devices to access the internet

97% 16-34   **94%** 35-54   **68%** 55+
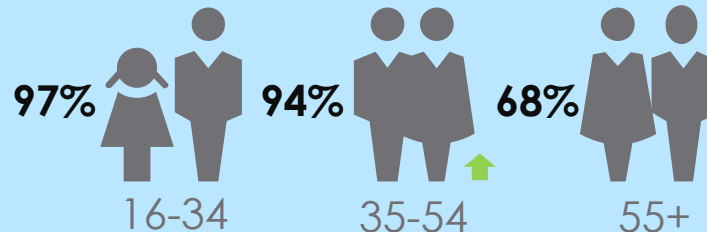
Email, finding information, buying goods and services and **looking at maps and directions** continued to be the main activities carried out on the internet by online Londoners

Almost all online Londoners use the internet for travel purposes, again higher among younger Londoners and regular business travellers

Internet in relation to travel

95% **use the internet for travel purposes**

- Maps & directions (90%)
- Live public transport information (80%)
- Making day to day travel plans (72%)

..and **74%** **of online Londoners access the internet for travel purposes through a mobile device**

Most likely to use the internet on a daily basis for travel purposes:

57%   34%   12%

16-34   35-54   55+
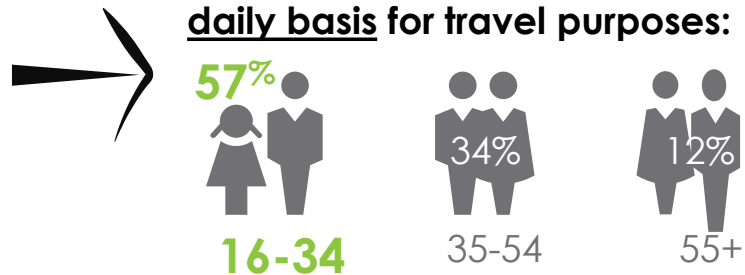
Weekly business travellers = 67%
Weekly commuters = 53%
Weekly personal business travellers = 45%
Weekly leisure travellers = 45%

Just under half of online Londoners use journey planning apps and one in five use social media for travel purposes in London

Apps and social media

Apps

Three quarters (77%) of online Londoners use apps

89% among 16-34s

Just under half (46%) use apps for travel in London

60% among 16-34s

Top 4 travel apps used (among app users):

- Google Maps **(53%)**
- Tube Map **(31%)**
- Citymapper **(23%)**
- London Bus Live Countdown **(22%)**

Main activities on apps (among app users):

Activity	%
Check bus times	52%
Checking the best route	43%
Viewing maps	42%
Checking journey time	40%
Live travel information	38%
Check tube times	33%
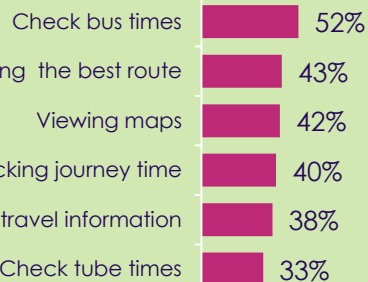
Social media

Nearly 9 in 10 (89%) ever use any social media

98% among 16-34s

Use:

[f] 80%   [twitter] 47%

1 in 5 (20%) use social media in relation to travel in London

Most used in relation to travel:

- [f] Facebook **(14% of online Londoners)**
- [twitter] Twitter **(13%)**
- Google+ Google+ **(8%)**

Social media is used for a range of purposes, particularly entertainment, keeping in touch with family/ friends and networking. It is used less for news and information than the internet in general

Over 9 in 10 online Londoners use the TfL website, a significant increase since autumn 15 - the experience continues to be rated well

TfL website

⬆ = Significant increase vs. Autumn 15 at a 95% confidence level

⬇ = Significant decrease vs. Autumn 15 at a 95% confidence level

Usage

91% ever use the TfL website

95% among 16-34s

A quarter of online Londoners use the TfL website daily (24%)

% of website users ever accessing through a...

81%	58%	34%
Desktop/ laptop	Smartphone	Tablet

Experience of TfL website

Customer experience of the TfL website continues to be very positive

94% rate 'above average' or higher

Mean satisfaction score = 72%

Main reasons for being satisfied with the TfL website (rated 7-10 out of 10)

Information 27%

Tools 17%   *Usability* 17%
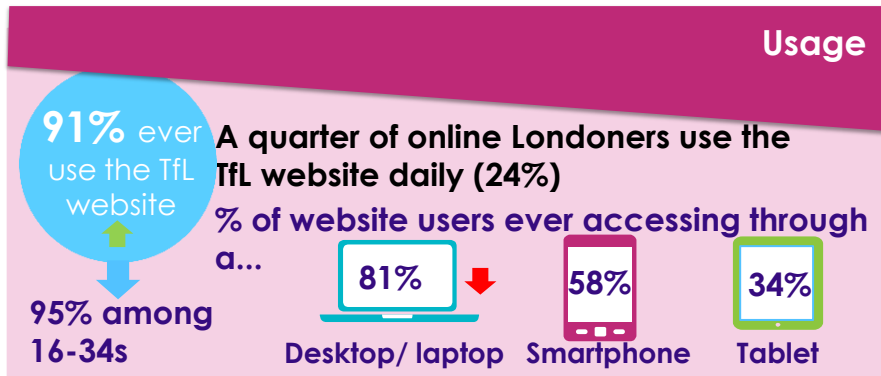
Main activities carried out on the TfL website:

- Checking best route (53%)
- Live travel information (51%)
- Checking bus times (49%)
- Checking journey times (43%)
- Checking Tube times (41%)
- Information about planned works/ closures (40%)

Use of the TfL website among online Londoners significantly increased from Autumn 15

Frequency of usage of the TfL website (online Londoners)

⬆ = Significant increase vs. Autumn 15 at a 95% confidence level

⬇ = Significant decrease vs. Autumn 15 at a 95% confidence level
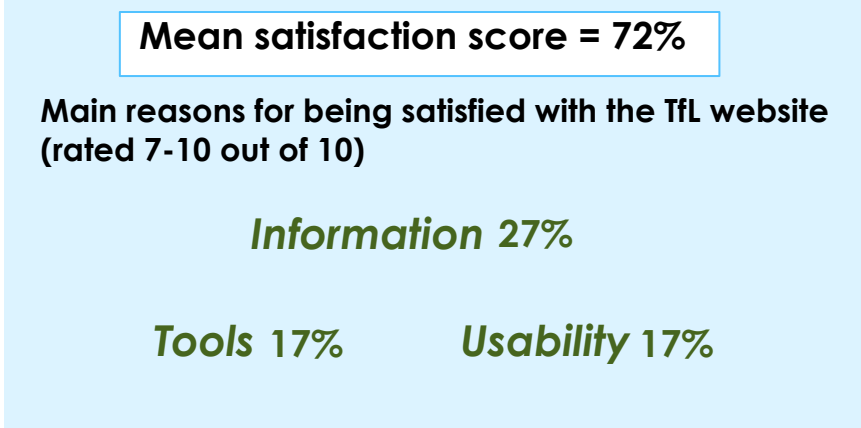

— Ever use - Telephone   — Use Daily - Telephone   — Ever use - Online   — Use Daily - Online

Telephone only

Parallel run: Online and Telephone

Online only

Ever use - Telephone: 68% (2010), 75% (2011), 74% (Jan-12), 77% (Autumn 12), 77% (Spring 13), 76% (Autumn 13), 76% (Spring 14), 81% (Autumn 14), 76% (Spring 15)

Ever use - Online: 88% (Spring 15), 88% (Autumn 15), 91% (Spring 16)

Use Daily - Telephone: 5% (2010), 5% (2011), 6% (Jan-12), 10% (Autumn 12), 10% (Spring 13), 10% (Autumn 13), 11% (Spring 14), 9% (Autumn 14), 12% (Spring 15)

Use Daily - Online: 22% (Spring 15), 24% (Autumn 15), 24% (Spring 16)

X-axis: 2010, 2011, Jan-12, Autumn 12, Spring 13, Autumn 13, Spring 14, Autumn 14, Spring 15, Autumn 15, Spring 16

I9. How often do you use the TfL website?
Base: Spring 2016, all respondents (n=1192); All other waves (circa, n=1000+)

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Experience of the TfL website remains positive, with 19 out of every 20 website users rating it above average or higher
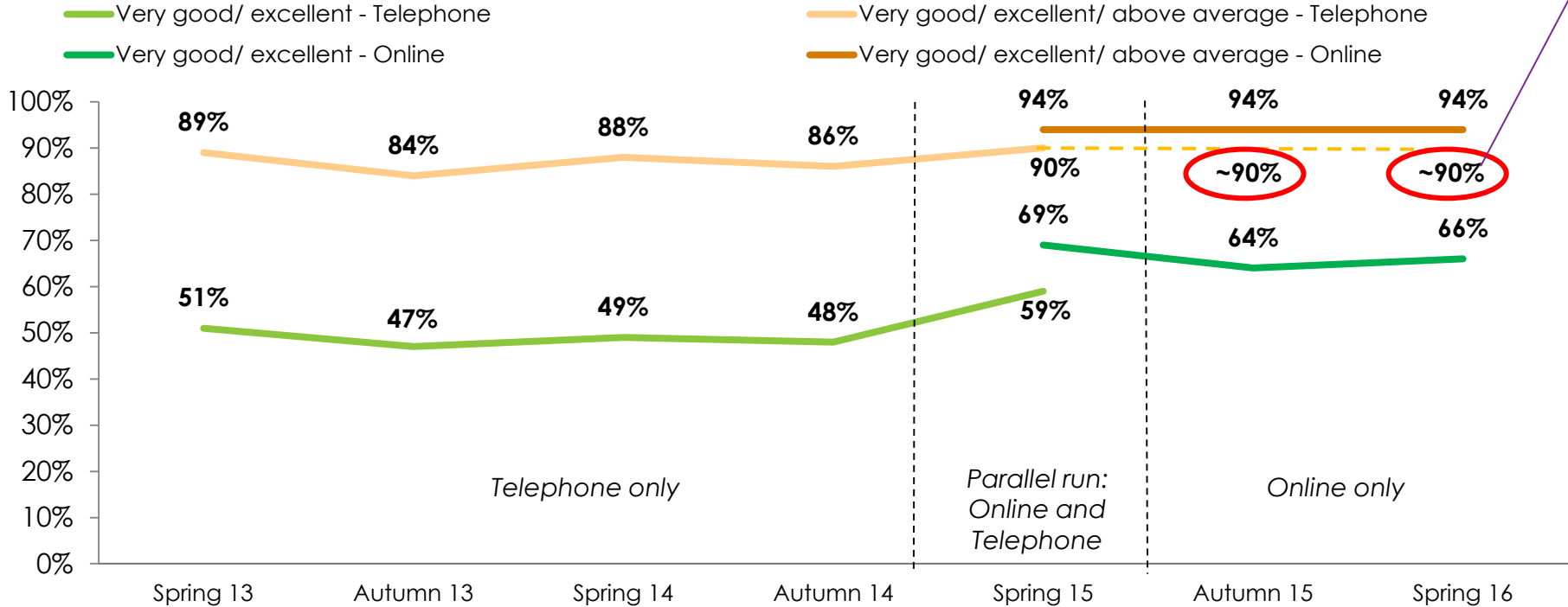
Experience of the TfL website (TfL website users)

The KPI score from online data remained in line with the previous wave, therefore we have **extrapolated** the result of the telephone score from the previous telephone wave (Spring 15)

Legend:
- Very good/ excellent - Telephone
- Very good/ excellent - Online
- Very good/ excellent/ above average - Telephone
- Very good/ excellent/ above average - Online

Telephone only

Parallel run: Online and Telephone

Online only

Chart values:

Very good/ excellent/ above average - Telephone: Spring 13: 89%, Autumn 13: 84%, Spring 14: 88%, Autumn 14: 86%, Spring 15: 90%

Very good/ excellent/ above average - Online: Spring 15: 94%, Autumn 15: 94%, Spring 16: 94%

Very good/ excellent - Telephone: Spring 13: 51%, Autumn 13: 47%, Spring 14: 49%, Autumn 14: 48%, Spring 15: 59%

Very good/ excellent - Online: Spring 15: 69%, Autumn 15: 64%, Spring 16: 66%

Extrapolated telephone (circled): Autumn 15: ~90%, Spring 16: ~90%

X-axis: Spring 13, Autumn 13, Spring 14, Autumn 14, Spring 15, Autumn 15, Spring 16

I10a: Please rate your experience of the TfL website overall…
Base: All respondents who have used the TfL website (Spring 2016 n=1080; Autumn 2015 n= 896; Spring 2015 n=684; Autumn 2014 n=721; Spring 2014 n=691; Autumn 2013 n=684; Spring 2013 n=707)

Mean satisfaction remained in line with Autumn 15, with a mean percentage of 72 per cent

Mean satisfaction with the TfL website (TfL website users) – new scale

Mean satisfaction score *– converted to a score out of 100 from a mean score out of 10*
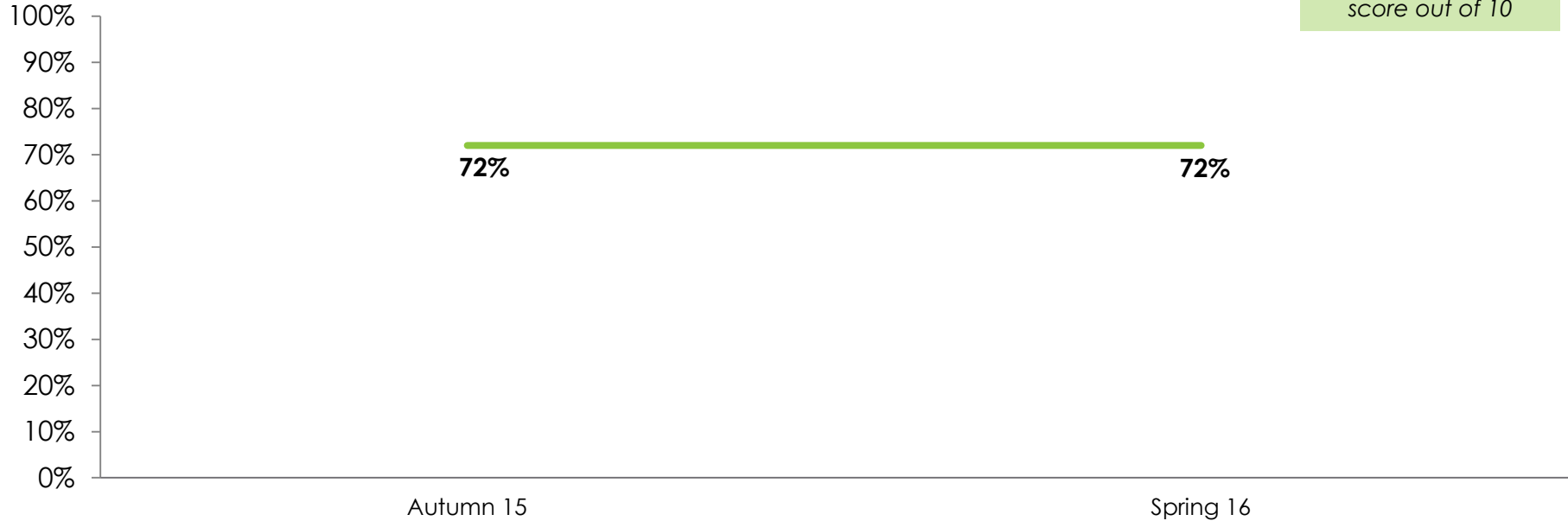
I10b. Thinking of the TfL website overall, how satisfied are you with?
Base: TfL website users (Spring 2016 n=1080; Autumn 2015 n=896)

In addition to the website again a range of other TfL information sources were used when travelling, especially real-time sources such as displays and staff

Other TfL sources of information used

⬆ = *Significant increase vs. Autumn 15 at a 95% confidence level*

⬇ = *Significant decrease vs. Autumn 15 at a 95% confidence level*

Sources used for real-time travel information

Live digital displays

Bus Countdown display
66% regularly use

Tube Countdown display
59% regularly use

Next stop display
47% regularly use

Electronic displays in Tube stations
30% regularly use

Staff when travelling
49% ever use ⬇

TfL Twitter feed
20% ever use

Bus times text service
39% ever use

Email

Over half of online Londoners **(53%)** have received a TfL email with travel related information

Majority **(93%)** find these emails useful

Older people are more reliant on announcements/ displays and staff while travelling *(use real-time travel information)*:

Announcements/ displays:
- 16-34 **(42%)**
- 35-54 **(57%)**
- 55+ **(74%)**

Staff:
- 16-34 **(27%)** ⬇
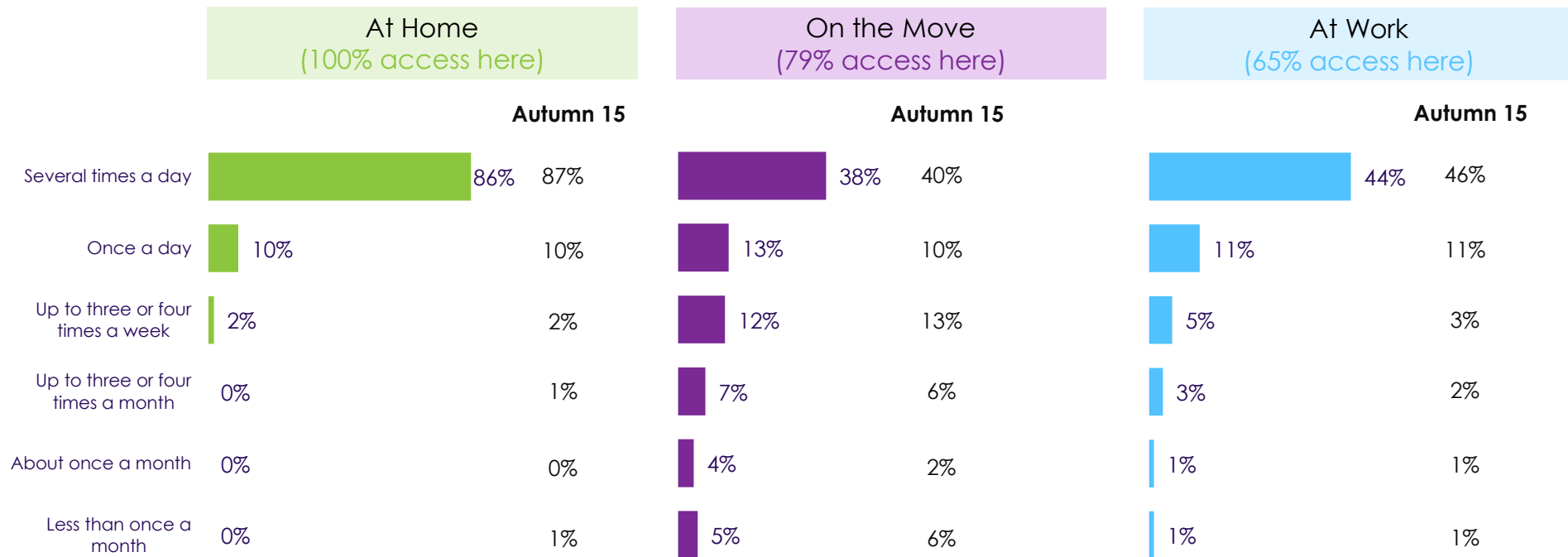- 35-54 **(42%)**
- 55+ **(49%)**

Internet access and device usage

All access the internet at home, four in five access the internet on the move and nearly two thirds access at work

Frequency of internet usage (online Londoners)

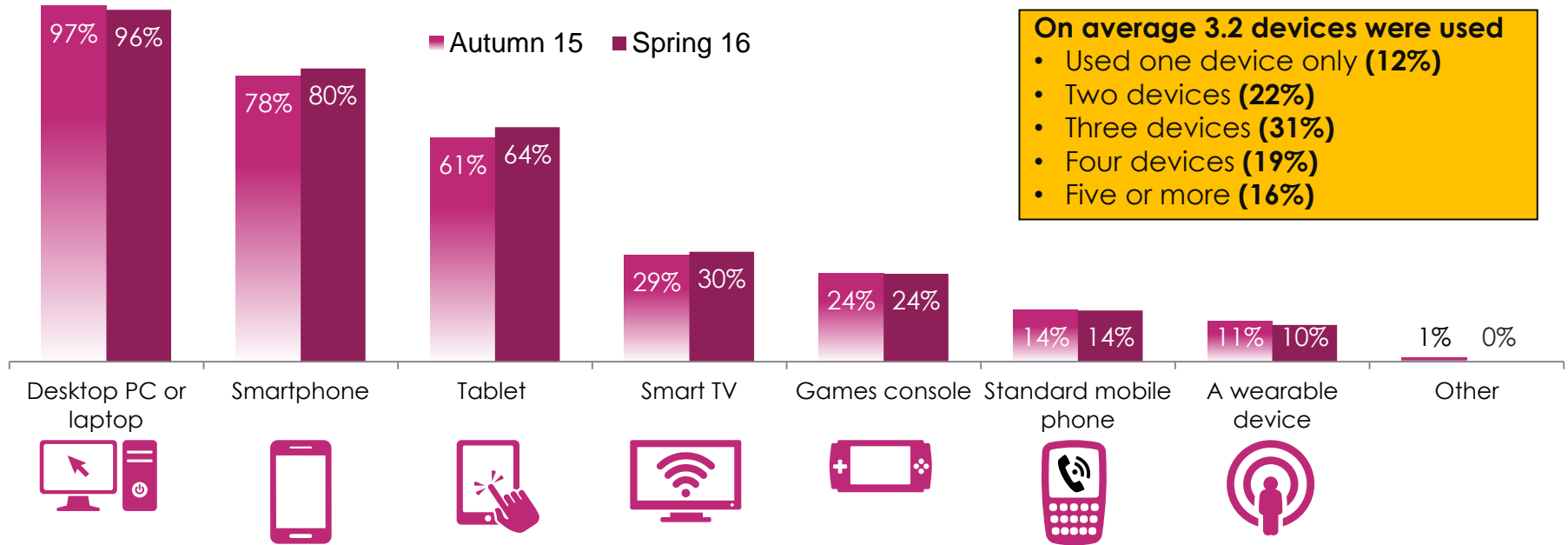|	At Home (100% access here)		On the Move (79% access here)		At Work (65% access here)	
		Autumn 15		Autumn 15		Autumn 15
Several times a day	86%	87%	38%	40%	44%	46%
Once a day	10%	10%	13%	10%	11%	11%
Up to three or four times a week	2%	2%	12%	13%	5%	3%
Up to three or four times a month	0%	1%	7%	6%	3%	2%
About once a month	0%	0%	4%	2%	1%	1%
Less than once a month	0%	1%	5%	6%	1%	1%

I1: How often do you access the internet in each of these places?
Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017)

Though PCs/ laptops are the most used devices, nearly nine in ten access the internet on a mobile device (notably through a smartphone/ tablet)

Devices used to access the internet (online Londoners)

89% accessed the internet on <u>any</u> mobile device vs. 87% in Autumn 2015
(Net: Smartphone, tablet, standard mobile or wearable device)

On average 3.2 devices were used
- Used one device only **(12%)**
- Two devices **(22%)**
- Three devices **(31%)**
- Four devices **(19%)**
- Five or more **(16%)**

■ Autumn 15 ■ Spring 16

Device	Autumn 15	Spring 16
Desktop PC or laptop	97%	96%
Smartphone	78%	80%
Tablet	61%	64%
Smart TV	29%	30%
Games console	24%	24%
Standard mobile phone	14%	14%
A wearable device	11%	10%
Other	1%	0%

I3. Which of the following devices do you use to access the internet?
Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017)

Smartphone and tablet usage remains higher among under 55s, ABC1s, those in work and inner Londoners

Use of tablets and smartphone devices demographic breakdown (online Londoners)

% use a tablet

64%	63%	68%	69%	49% ⬆	67%	55%	70% ⬆	54%	67%	61%

% use a smartphone

80%	81%	92%	88% ⬆	49%	82%	77% ⬆	88%	67%	85%	77%

| Male | Female | 16-34 | 35-54 | 55+ | ABC1 | C2DE | Work | Not working | Inner | Outer |

⬆ = Significant increase vs. Autumn 15 at a 95% confidence level
⬇ = Significant decrease vs. Autumn 15 at a 95% confidence level

I3. Which of the following devices do you use to access the internet?
Base: Male (538); Female (654);16-34 (385); 35-54 (476); 55+ (331); ABC1 (858); C2DE (334); Work (783); Not working (409); Inner (428); Outer (764)

As seen in Autumn 15, Androids were the most used smartphones, followed by Apple phones

Type of smartphone used (smartphone users)

Autumn 15

	Autumn 15
Android = **59%**	62%
Apple = **47%**	49%
Windows = **16%**	18%
Blackberry = **9%** ⬇	12%
Other = **0%**	1%

Among smartphone users, over 55s were **less likely to own an Apple Phone** (29% vs. 47% total)

⬆ = *Significant increase vs. Autumn 15 at a 95% confidence level*

⬇ = *Significant decrease vs. Autumn 15 at a 95% confidence level*

Wearable device usage was in line with Autumn 15 with no observed increase following Christmas

Type of wearable device used (online Londoners)

Please note, this was a new question in Spring 2016

Wearables used (Spring 2016)

Spring 2016
10% used at least one wearable device

Autumn 2015
11% used at least one wearable device

Apple smartwatch = **7%** (66% of wearable users)

Health or activity monitor device = **6%** (62% of wearable users)

Virtual reality devices = **4%** (40% of wearable device users)

Other smartwatch (not Apple) = **4%** (37% of wearable users)

Almost all online Londoners access the internet for travel related information
Reasons for using the internet (online Londoners/ mobile device users)

95% use the internet for travel purposes (looking up maps and directions, accessing live public transport information or making day to day travel plans)

→ **Was 94%** in Autumn 15

Main activities carried out online:
- Email (97%)
- Finding/ sourcing information (92%)
- Buying goods/ services (90%)
- Looking up maps and directions (90%)

→ **Main activities carried out online in Autumn 15:**
- Email (98%)
- Finding/ sourcing information (93%)
- Buying goods/ services (91%)
- Looking up maps and directions (91%)

84% of those accessing the internet <u>through a mobile device</u> use a mobile device for travel purposes

→ **Was 83%** in Autumn 15

As seen in Autumn 15, less activities on average were carried out on a mobile device compared with the internet in general (9 vs. 11.4) – looking up maps and directions remained the second highest internet activity on a mobile device

Accessing digital travel and journey planning information

Over one third use the internet for travel purposes in London at least once a day

Frequency of internet usage (online Londoners)
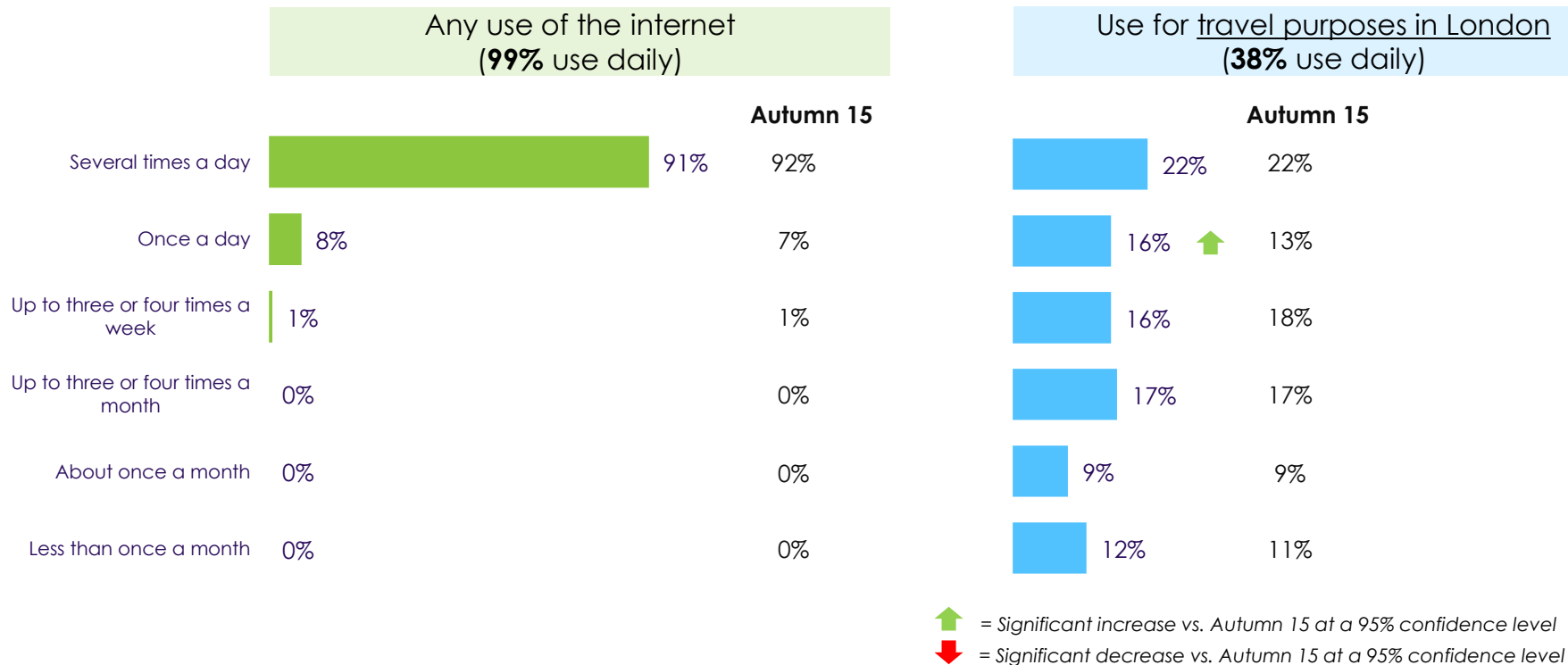
Any use of the internet **(99%** use daily)		Use for travel purposes in London **(38%** use daily)	
	Autumn 15		Autumn 15
Several times a day — 91%	92%	22%	22%
Once a day — 8%	7%	16% ⬆	13%
Up to three or four times a week — 1%	1%	16%	18%
Up to three or four times a month — 0%	0%	17%	17%
About once a month — 0%	0%	9%	9%
Less than once a month — 0%	0%	12%	11%

⬆ = *Significant increase vs. Autumn 15 at a 95% confidence level*
⬇ = *Significant decrease vs. Autumn 15 at a 95% confidence level*

I1: How often do you access the internet in each of these places?; I6. How often do you access the internet in relation to travel in London?
Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017)

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The 16-34s, men, ABC1s, inner Londoners, workers and those travelling for business, continue to access London travel information online more frequently

Internet in relation to travel in London (% using at least once a day): Demographic pattern

⬆ = *Significant increase vs. Autumn 15 at a 95% confidence level*

⬇ = *Significant decrease vs. Autumn 15 at a 95% confidence level*

57%
34%
12%

16-34
35-54
55+

Men 41%
Women 35%

A
B
C1
C2
D
E

ABC1 41%
C2DE 29%

Inner London
Outer London = 32%

46%

48%
21%

Working
Not working
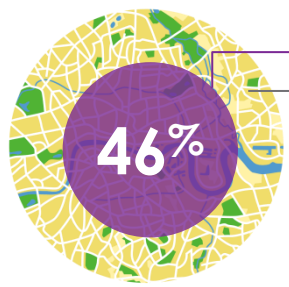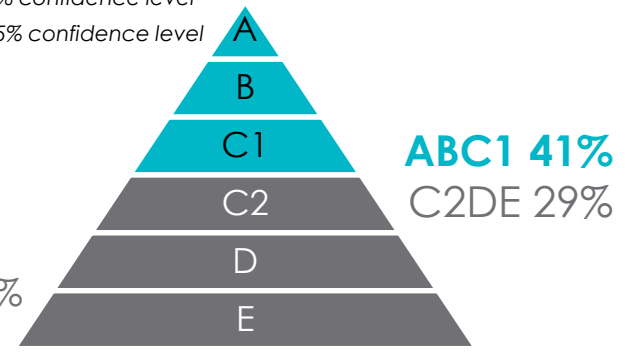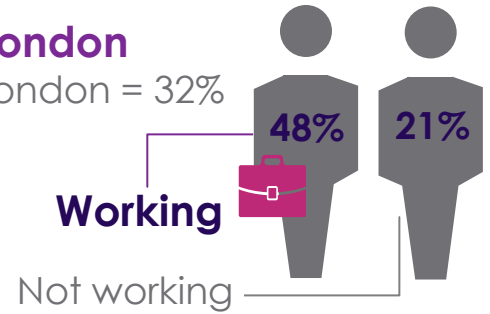
Weekly:
Business travellers = 67%
Commuters = 53%
Personal business = 45%
Leisure = 45%

Non-disabled online Londoners 38%
Disabled online Londoners 37% ⬆

I6. How often do you access the internet in relation to travel in London?
Base: Men (538); Women (654); 16-34 (385); 35-54 (476); 55+ (331); ABC1 (858); C2DE (334); Working (783); Not working (409); Inner (428); Outer (764); Once a week: Commute (736); Business travellers (320); Personal business (722); Leisure (795); Disabled (243); Non-disabled (928)

A range of London travel activities were carried out online, including looking up routes, times and getting live travel information and service updates

Activities in relation to travel on the internet (all using the internet for travel purposes)

Legend: ■ Autumn 15 ■ Spring 16

Activity	Autumn 15	Spring 16
Viewing maps	55%	56%
Checking the best route	54%	56%
Checking journey time	50%	53%
Check bus times	48%	50%
Live travel information / service updates	49%	46%
Check train times (not Tube)	51%	42% ⬇
Information about planned works or closures	34%	32%
Check Tube times	33%	30%

Note 'not Tube' added in Spring 16

Activity	Autumn 15	Spring 16
Information about fares and tickets	30%	27%
Information about roads or driving	25%	22%
Check your Oyster balance	21%	19%
Buying tickets	19%	16%
Topping up your Oyster card	17%	15%
Information about Oyster	16%	15%
Keep track of how much you're spending on travel	13%	12%
Information about cycling	9%	7%

⬆ = Significant increase vs. Autumn 15 at a 95% confidence level

⬇ = Significant decrease vs. Autumn 15 at a 95% confidence level

I7. Still thinking specifically about travelling in London, which of the following do you use the internet for?
Base: All that use the internet for travel in London (Spring 16 n=1098; Autumn 15 n=917)

Use of journey planning apps and social media

Over three quarters of online Londoners use apps and just under half use them for travel in London – in line with Autumn 15

App usage (online Londoners)

Spring 2016

77% used **any apps**

60% of <u>app users</u> used London travel apps

46% used **London travel apps**

Autumn 2015

77% used **any apps**

60% of <u>app users</u> used London travel apps

46% used **London travel apps**

As in Autumn 15, app usage was significantly higher **among 16-34s**

A1. Do you use any apps, either free or paid for? A3. Do you use specific apps in relation to travel in London?
Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017)

Google maps remained the most used travel app – Tube Map was used by nearly a third of travel app users

Top ten London travel apps used in Spring 2016 (travel app users)

53%	31%	23%	22%	15%
Google Maps	**Tube map-London Underground**	**Citymapper: Bus, Tube, Rail**	**London Bus Live Countdown**	**London Oyster Balance**

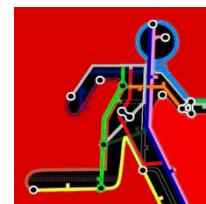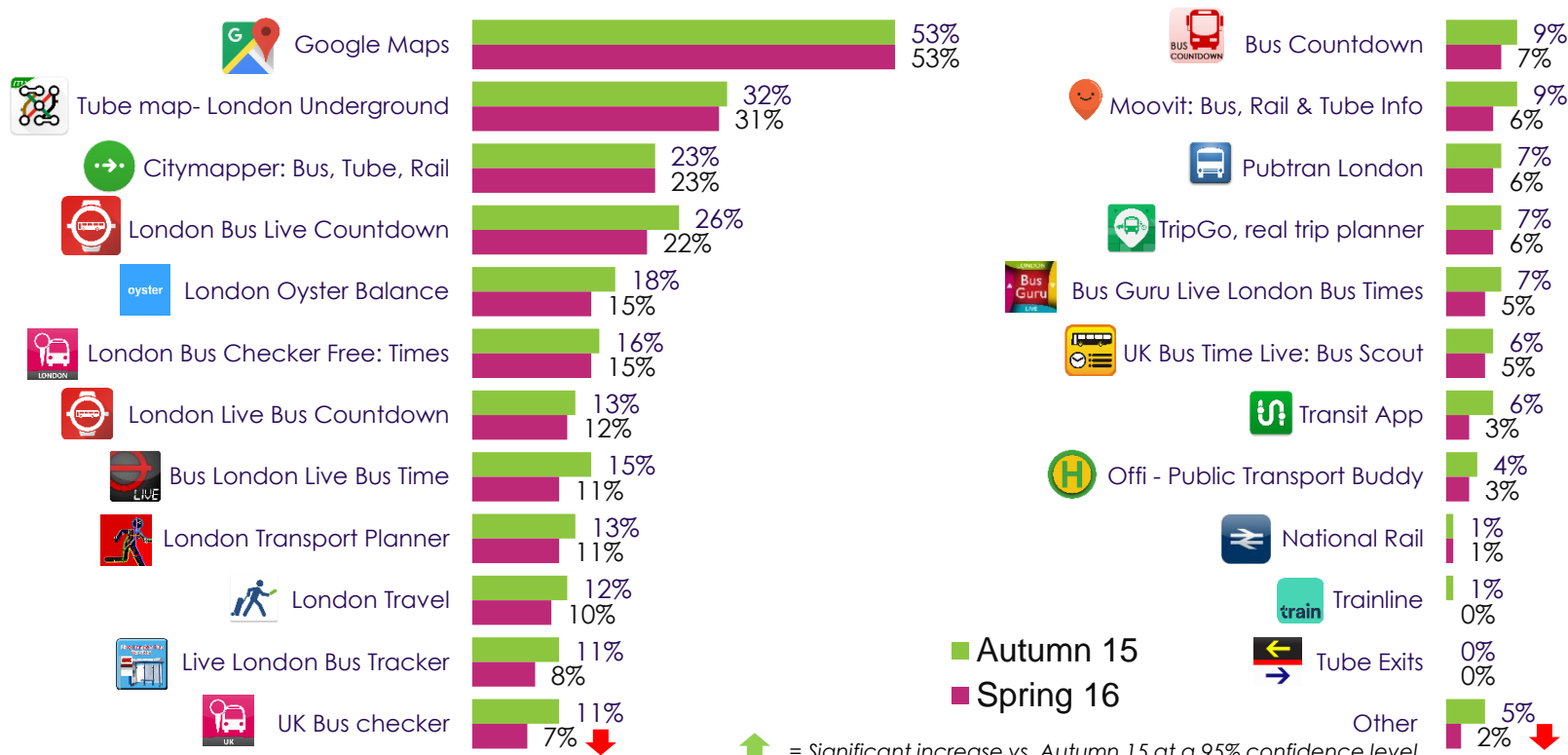| 15%	12%	11%	11%	10%
London Bus Checker Free: Times	**London Live Bus Countdown**	**Bus London Live Bus Time**	**London Transport Planner**	**London Travel**

A5. Which of the following London Travel apps do you use?
Base: Travel app users (n=530)

Google maps was the most used travel app – usage for the majority of apps remained in line with Autumn 15

All travel apps used (travel app users)

App	Autumn 15	Spring 16
Google Maps	53%	53%
Tube map- London Underground	32%	31%
Citymapper: Bus, Tube, Rail	23%	23%
London Bus Live Countdown	26%	22%
London Oyster Balance	18%	15%
London Bus Checker Free: Times	16%	15%
London Live Bus Countdown	13%	12%
Bus London Live Bus Time	15%	11%
London Transport Planner	13%	11%
London Travel	12%	10%
Live London Bus Tracker	11%	8%
UK Bus checker	11%	7% ↓
Bus Countdown	9%	7%
Moovit: Bus, Rail & Tube Info	9%	6%
Pubtran London	7%	6%
TripGo, real trip planner	7%	6%
Bus Guru Live London Bus Times	7%	5%
UK Bus Time Live: Bus Scout	6%	5%
Transit App	6%	3%
Offi - Public Transport Buddy	4%	3%
National Rail	1%	1%
Trainline	1%	0%
Tube Exits	0%	0%
Other	5%	2% ↓

■ Autumn 15
■ Spring 16

⬆ = Significant increase vs. Autumn 15 at a 95% confidence level
⬇ = Significant decrease vs. Autumn 15 at a 95% confidence level

Travel apps often fulfil a range of specific journey planning needs such as checking times, maps and routes

Activities in relation to London travel (travel app users)

■ Autumn 15   ■ Spring 16

Activity	Autumn 15	Spring 16
Check bus times	55%	52%
Checking the best route	42%	43%
Viewing maps	48%	42%
Checking journey time	40%	40%
Live travel information / service updates	37%	38%
Check tube times	33%	33%
Check train times (not Tube)	38%	30% ↓
Information about planned works or closures	20%	19%

Note 'not Tube' added in Spring 16 →

Activity	Autumn 15	Spring 16
Information about roads or driving	16%	17%
Check your Oyster balance	16%	17%
Information about fares and tickets	19%	16%
Buying tickets	16%	14%
Information about Oyster	16%	12%
Topping up your Oyster card	12%	11%
Keep track of how much you're spending on travel	11%	10%
Information about cycling	11%	8%

As in Autumn 15, almost all travel related activities were carried out less on apps than the internet in general
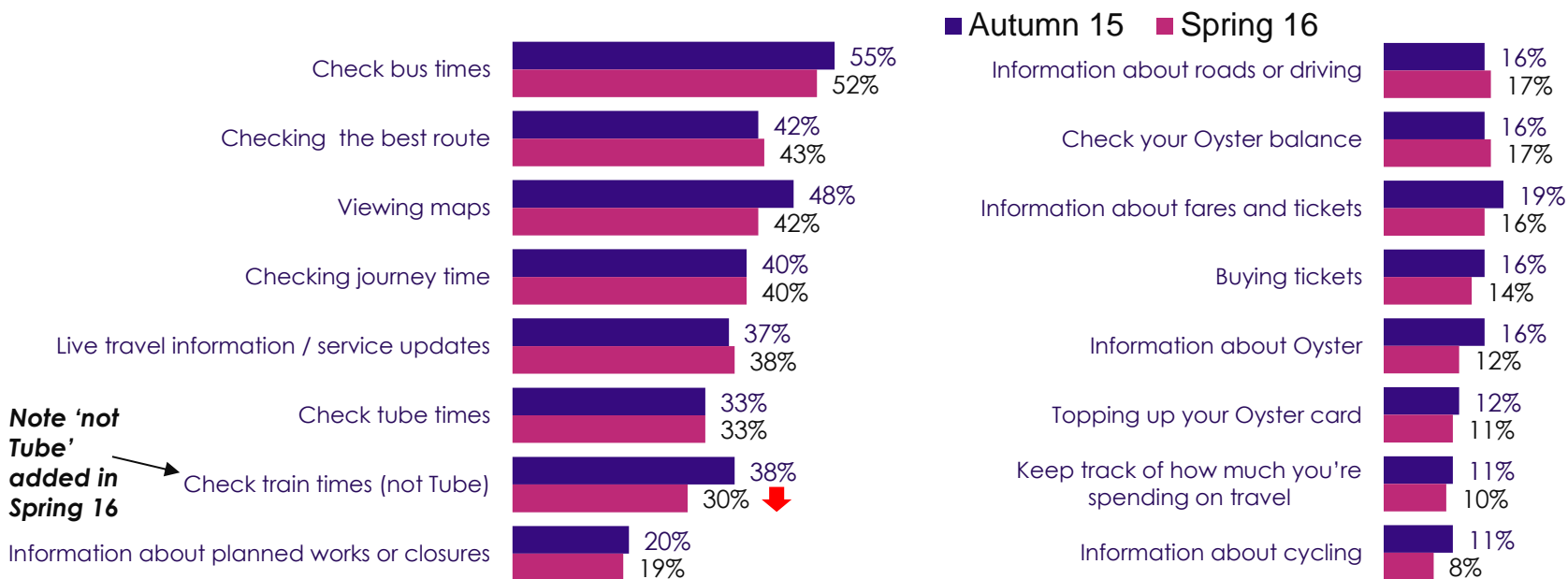
↑ = Significant increase vs. Autumn 15 at a 95% confidence level
↓ = Significant decrease vs. Autumn 15 at a 95% confidence level

A4. Which of the following do you use your London Travel Apps for?
Base: Travel app users (Spring 2016 n=530; Autumn 15 n=463)

The majority of online Londoners used at least one social media site/ app – one in five used social media for London travel information

Social media usage (online Londoners)

Used any social media

89%

Used any **social media regularly**

87%

Used any social media for London travel information

20%

Figures include You Tube which TfL recognise is not strictly social media

'Regular' social media usage increased in Spring 16, although use for travel information was lower

Social media usage (online Londoners)

Spring 2016

87% use any **social media regularly**

23% of <u>social media users</u> use it for London travel information

20% used **social media for London travel information**

Autumn 2015

82% used any **social media regularly**

29% of <u>social media</u> users use it for London travel information

24% used **social media for London travel information**

Please note, this question was asked to 'all' social media users instead of 'regular' social media users in Spring 2016

Figures include You Tube which TfL recognise is not strictly social media

SM1. Which of these do you regularly use? SM2. Do you ever use social media for London travel information?

Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017)

Use of Facebook and YouTube was highest – Twitter, Google+ and Linkedin were used by over 40 per cent of online Londoners

Social media use - Spring 2016 (online Londoners)

Please note, this was a new question in Spring 2016

80%
(73% weekly)

80% *
(68% weekly)

47%
(37% weekly)

44%
(31% weekly)

43%
(29% weekly)

37%
(31% weekly)

31%
(22% weekly)

28%
(23% weekly)

23%
(15% weekly)

* TfL recognise that You Tube is not strictly social media

SM1ai. How often do you use each of the following social media sites/ apps?
Base: All respondents (Spring 16 n=1192)

Social media was used for a range of purposes, particularly entertainment, keeping in touch with family/ friends and networking

Purpose of social media usage (users of each social media)

Facebook used most for contacting family/ friends

78% to contact friends and family
(80% in Autumn 15)

53% for entertainment
(55% in Autumn 15)

30% for news/ information
(35% in Autumn 15)

Twitter used most for news/ information and entertainment

37% for news/ information
(47% in Autumn 15)

34% for entertainment
(42% in Autumn 15)

34% to contact friends and family
(35% in Autumn 15)

YouTube used most for entertainment

78% for entertainment
(81% in Autumn 15)

25% for news/ information
(24% in Autumn 15)

12% for customer service
(14% in Autumn 15)

TfL recognise that You Tube is not strictly social media

SM1c. Please indicate which of the following purposes you like to use each of these for?
Base: Users of each social media

Please note, the base for this question changed to 'all' social media users from 'regular' social media users in Spring 2016

Facebook and Twitter were most used for travel in London – as seen in Autumn 15, a higher proportion of Twitter's users used it for travel in London

Social media used for travel in London Spring 2016 (online Londoners)

Facebook	Twitter	Google+	YouTube *	LinkedIn
14%	**13%**	**8%**	**8%**	**6%**
(18% of all users)	**(28% of all users)**	**(19% of all users)**	**(10% of all users)**	**(14% of all users)**

Instagram	snapchat	Pinterest	tumblr.
6%	**5%**	**4%**	**3%**
(16% of all users)	**(16% of all users)**	**(13% of all users)**	**(15% of all users)**

* TfL recognise that You Tube is not strictly social media

SM2B Which of these do you use for London travel information?
Base: All respondents (Spring 16 n=1192)

Data in brackets showing the percentage using each site/ app for travel purposes among respective users of each site/ app

As seen in Autumn 15, younger online Londoners used social media more often, including across the most used social media sites/ apps

Social Media regularly used (online Londoners)

	Regularly use any social media		Facebook		YouTube *		Twitter	
	Spring 16	Autumn 15	Spring 16	Autumn 15	Spring 16	Autumn 15	Spring 16	Autumn 15
16-34	**98%** ⬆	95%	**80%** ⬇	88%	**74%**	74%	**36%** ⬇	47%
35-54	**88%** ⬆	83%	**72%**	75%	**53%** ⬆	47%	**29%**	31%
55+	**66%** ⬆	58%	**54%**	55%	**26%**	23%	**14%**	13%

* TfL recognise that You Tube is not strictly social media
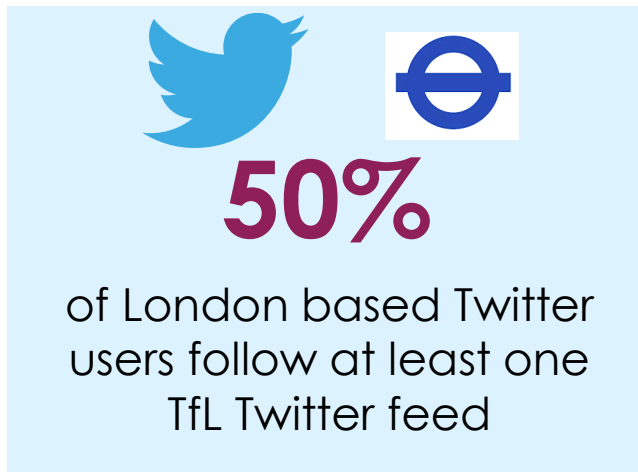
SM1. Which of these do you regularly use?
Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017)

⬆ = *Significant increase vs. Autumn 15 at a 95% confidence level*
⬇ = *Significant decrease vs. Autumn 15 at a 95% confidence level*

Half of Twitter users followed at least one TfL feed – the general TfL feed and Tube line feeds were most followed

Twitter feed usage (all Twitter users)

Please note, this was a new question in Spring 2016

50%

of London based Twitter users follow at least one TfL Twitter feed

Follow any TfL Twitter feed by age:
- **16-34 (56%)**
- **35-54 (49%)**
- **55+ (21%)**

Most used TfL feeds (all Twitter users)

Transport for London @TfL **= 27%**

Any Tube line feed **= 24%**

TfL Bus Alerts @TfLBusAlerts **= 16%**

TfL Travel Alerts @TfLTravelAlerts **= 14%**

TfL Traffic News @TfLTrafficNews **= 11%**

RT3. You told us earlier that you use Twitter. Do you follow any of the below TfL Twitter feeds?
Base: All Twitter users (Spring 16 n=540)

TfL website

TfL's website is a major source of London travel information, used by nine in ten online Londoners and almost all those that used the internet for travel in London

Website usage (online Londoners)

96% of those that use the internet for travel in London, use the TfL website

67% of TfL website users access through a mobile device

Used the internet in relation to travel

95%

(94% in Autumn 15)

Used the TfL website

91%

(88% in Autumn 15)

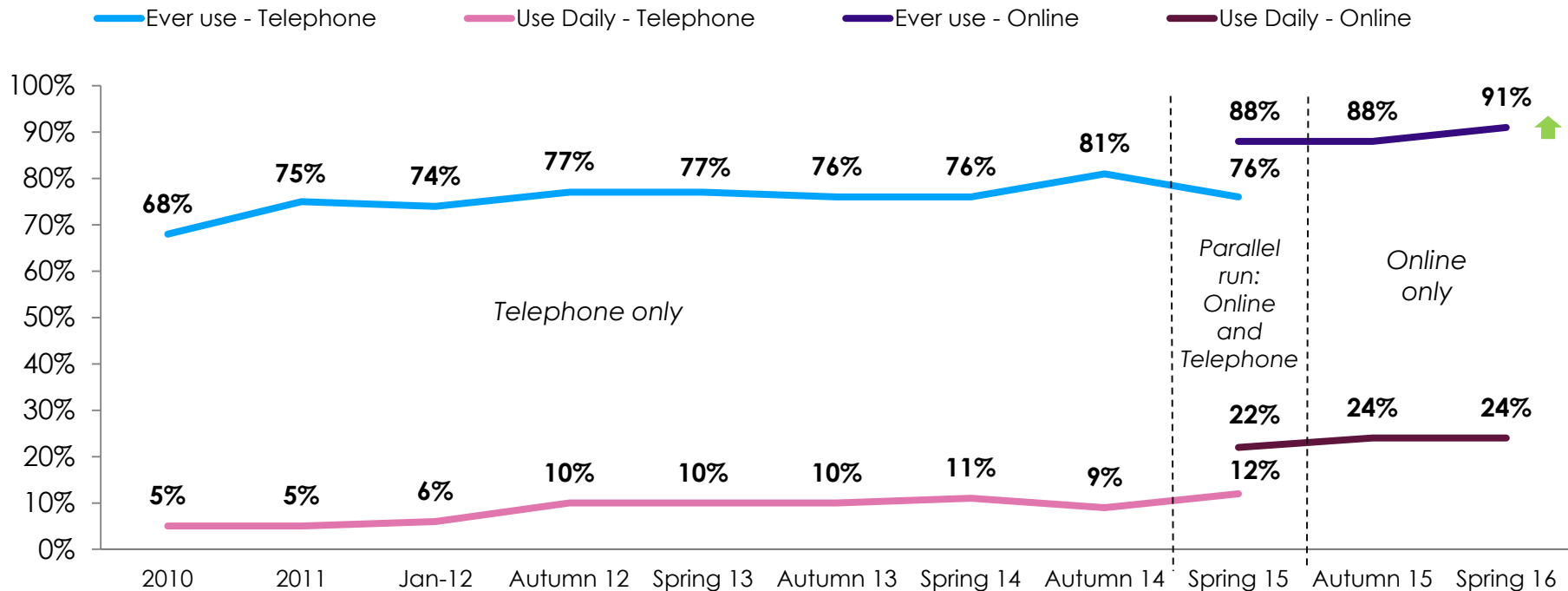**Access the TfL website through a mobile device**

61%

(60% in Autumn 15)

I6. How often do you access the internet in relation to travel in London?; I9. How often do you use the TfL website?; I12b. How often do you access the TfL website on a mobile device?
Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017)

Use of the TfL website among online Londoners significantly increased from Autumn 15

Frequency of usage of the TfL website (online Londoners)

⬆ = *Significant increase vs. Autumn 15 at a 95% confidence level*

⬇ = *Significant decrease vs. Autumn 15 at a 95% confidence level*

— Ever use - Telephone   — Use Daily - Telephone   — Ever use - Online   — Use Daily - Online

Telephone only

Parallel run: Online and Telephone

Online only

Ever use - Telephone: 68% (2010), 75% (2011), 74% (Jan-12), 77% (Autumn 12), 77% (Spring 13), 76% (Autumn 13), 76% (Spring 14), 81% (Autumn 14), 76% (Spring 15)

Ever use - Online: 88% (Spring 15), 88% (Autumn 15), 91% (Spring 16) ⬆

Use Daily - Telephone: 5% (2010), 5% (2011), 6% (Jan-12), 10% (Autumn 12), 10% (Spring 13), 10% (Autumn 13), 11% (Spring 14), 9% (Autumn 14), 12% (Spring 15)

Use Daily - Online: 22% (Spring 15), 24% (Autumn 15), 24% (Spring 16)

I9. How often do you use the TfL website?
Base: Spring 2016, all respondents (n=1192); All other waves (circa, n=1000+)

52

As in Autumn 15, a range of groups were more likely to have used the TfL website, notably under 55s, although their use increased wave on wave

Frequency of usage of the TfL website (online Londoners)

Differences in TfL website use (ever use)

16 – 34 (n=385)	95%	ABC1 (n=858)	94%	Inner London (n=428)	94%	Working (n=783)	95%
35 – 54 (n=476)	92%						
55+ (n=331)	84% ⬆	C2DE (n=334)	83%	Outer London (n=764)	89% ⬆	Not Working (n=409)	84%

⬆ = *Significant increase vs. Autumn 15 at a 95% confidence level*

⬇ = *Significant decrease vs. Autumn 15 at a 95% confidence level*

More likely to use TfL website (on a daily basis)

53% — Weekly Business Travellers (n=320)

66% ⬇ — Weekly Tram users (n=127)

64% — Weekly DLR users (n=196)

52% — Weekly Overground users (n=319)
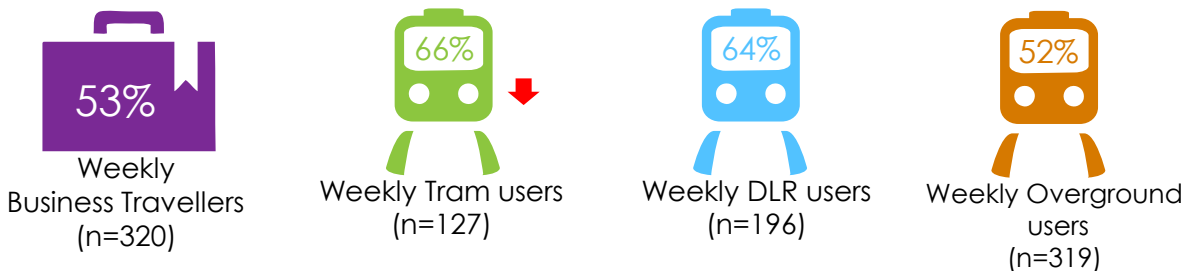
Please note, weekly Tram, DLR and Overground users in our sample were also more likely to be under 35

TfL's website was used for a range of purposes, in particular checking routes, live travel information, times and information about planned works or closures

Activities carried out on TfL's website (TfL website users)

Autumn 15
Spring 16

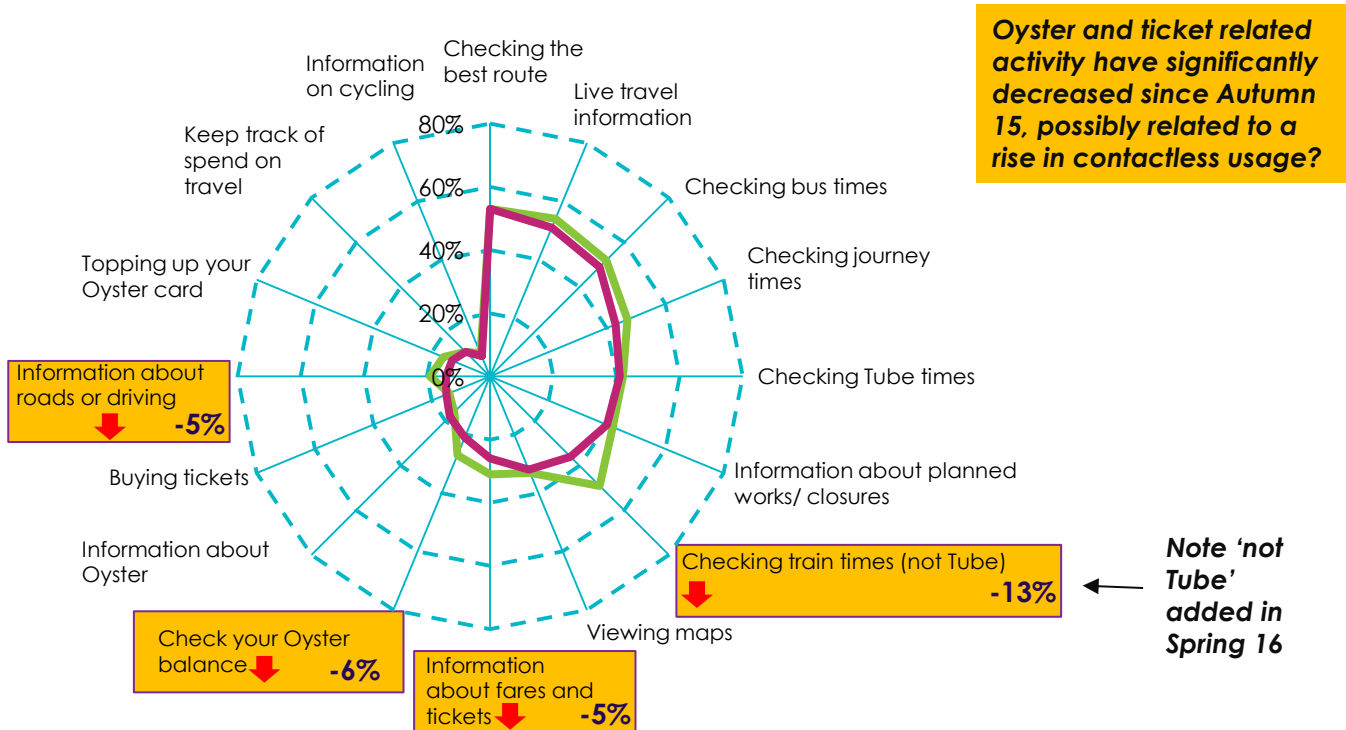Oyster and ticket related activity have significantly decreased since Autumn 15, possibly related to a rise in contactless usage?

Information on cycling
Checking the best route
Live travel information
Keep track of spend on travel
Checking bus times
Topping up your Oyster card
Checking journey times
Information about roads or driving -5%
Checking Tube times
Buying tickets
Information about planned works/ closures
Information about Oyster
Checking train times (not Tube) -13%
Check your Oyster balance -6%
Viewing maps
Information about fares and tickets -5%

80%
60%
40%
20%
0%

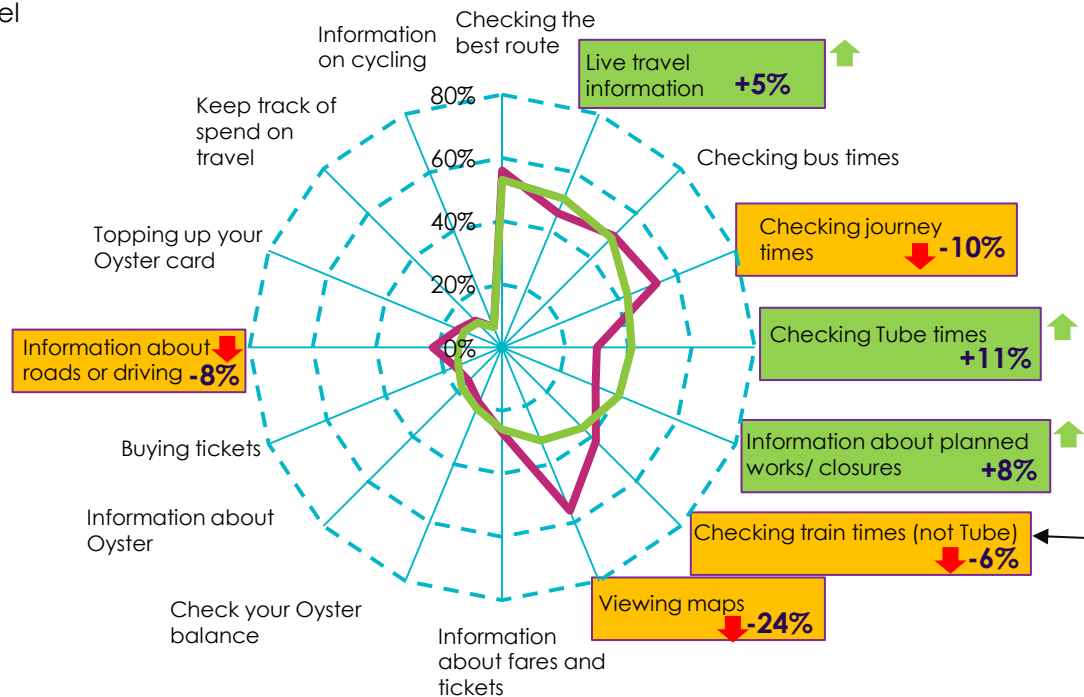Note 'not Tube' added in Spring 16

I11. Which of the following do you use/ have you used the TfL website for?
Base: TfL website users (Spring 2016 n=1080; Autumn 2015 n=896)

↑ = Significant increase vs. Autumn 15 at a 95% confidence level
↓ = Significant decrease vs. Autumn 15 at a 95% confidence level

TfL's website was used more than other sites for checking tube times, information about planned closures and live travel information but used less for viewing maps in particular

Travel activities carried out on the internet (TfL website users and those using internet for travel)

—— Internet in relation to travel

—— TfL website

Live travel information **+5%**

Checking bus times

Checking journey times **-10%**

Checking Tube times **+11%**

Information about planned works/ closures **+8%**

Checking train times (not Tube) **-6%**

Note 'not Tube' added in Spring 16

Viewing maps **-24%**

Information about fares and tickets

Check your Oyster balance

Information about Oyster

Buying tickets

Information about roads or driving **-8%**

Topping up your Oyster card

Keep track of spend on travel

Information on cycling

Checking the best route

Chart axis labels: 80%, 60%, 40%, 20%, 0%

I11. Which of the following do you use/ have you used the TfL website for?
Base: TfL website users (Spring 2016 n=1080); Those using the internet in relation to travel in London (n=1098)
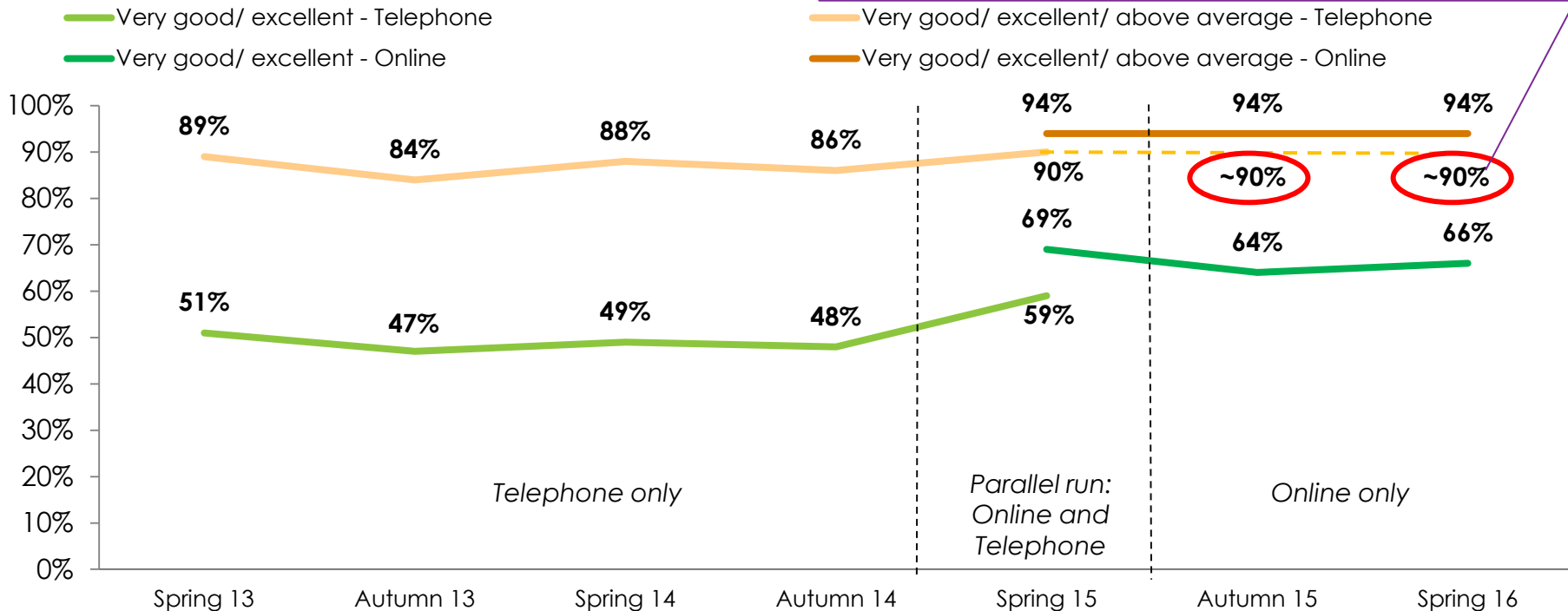
= *Significant increase vs. internet in general at a 95% confidence level*

= *Significant decrease vs. internet in general at a 95% confidence level*

Experience of the TfL website remains positive, with 19 out of every 20 website users rating it above average or higher

Experience of the TfL website (TfL website users)

The KPI score from online data remained in line with the previous wave, therefore we have **extrapolated** the result of the telephone score from the previous telephone wave (Spring 15)

Legend:
- Very good/ excellent - Telephone
- Very good/ excellent - Online
- Very good/ excellent/ above average - Telephone
- Very good/ excellent/ above average - Online

Chart data points:

Telephone only:
- Spring 13: 89% (above average - Telephone), 51% (Telephone)
- Autumn 13: 84%, 47%
- Spring 14: 88%, 49%
- Autumn 14: 86%, 48%

Parallel run: Online and Telephone:
- Spring 15: 94% (above average - Online), 90% (above average - Telephone), 69% (Online), 59% (Telephone)

Online only:
- Autumn 15: 94% (above average - Online), ~90%, 64% (Online)
- Spring 16: 94% (above average - Online), ~90%, 66% (Online)

*I10a: Please rate your experience of the TfL website overall…*
Base: All respondents who have used the TfL website (Spring 2016 n=1080; Autumn 2015 n= 896; Spring 2015 n=684; Autumn 2014 n=721; Spring 2014 n=691; Autumn 2013 n=684; Spring 2013 n=707)

Mean satisfaction remained in line with Autumn 2015, with a mean percentage of 72 per cent

Mean satisfaction with the TfL website (TfL website users) – new scale
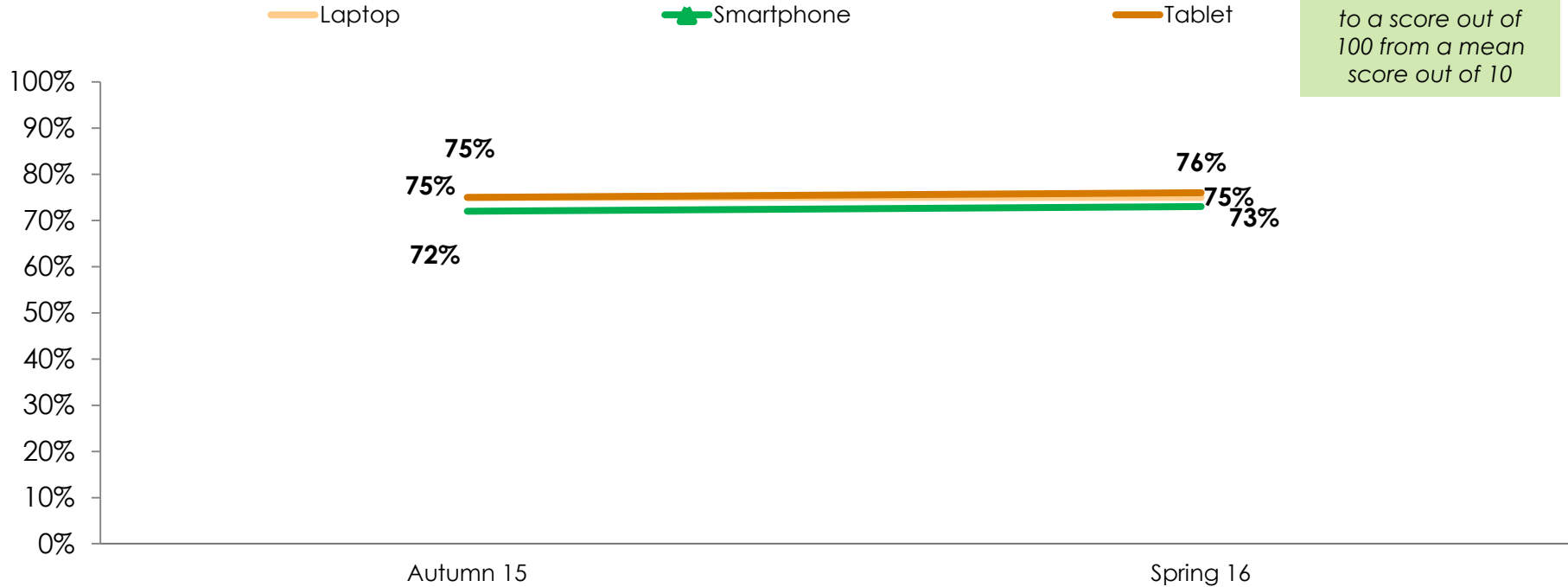
Mean satisfaction score – *converted to a score out of 100 from a mean score out of 10*
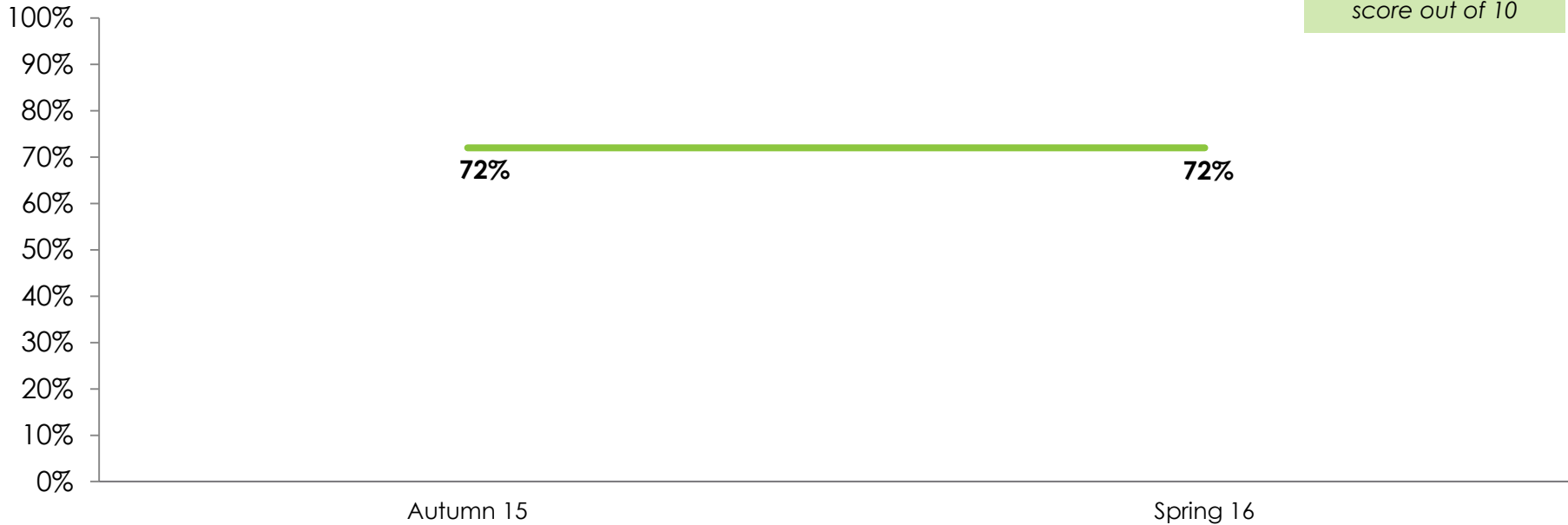
I10b. Thinking of the TfL website overall, how satisfied are you with?
Base: TfL website users (Spring 2016 n=1080; Autumn 2015 n=896)

And mean satisfaction across different devices also remained in line with Autumn 15

Mean satisfaction with the TfL website (TfL website users) – new scale

Laptop ▬▬ Smartphone ▬▲▬ Tablet ▬▬

Mean satisfaction score – *converted to a score out of 100 from a mean score out of 10*

- Autumn 15: Tablet **75%**, Laptop **75%**, Smartphone **72%**
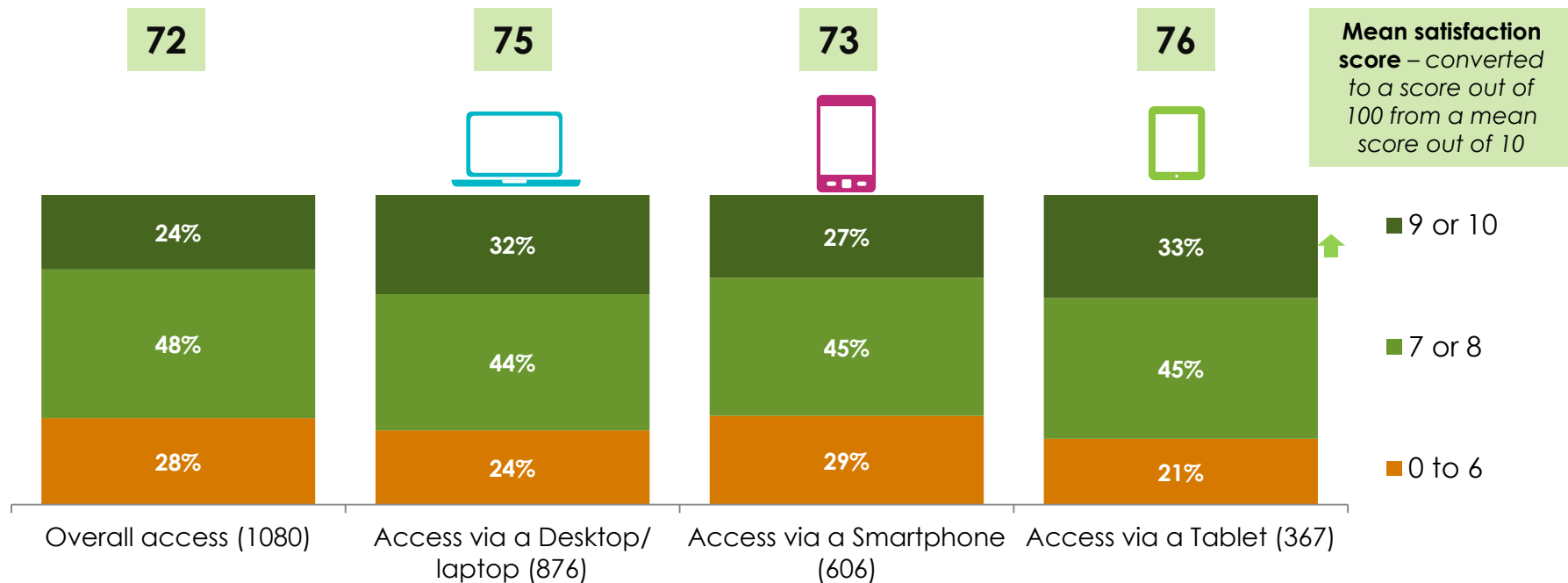- Spring 16: Tablet **76%**, Laptop **75%**, Smartphone **73%**

I10b. Thinking of the TfL website overall, how satisfied are you with?; I13. how satisfied are you with the TfL website through each of these devices?
Base: TfL website users (Spring 2016 n=1080; Autumn 2015 n=896)

One quarter were 'very satisfied' with the TfL website – high level satisfaction (9-10 out of 10) through a tablet significantly increased

Satisfaction with the TfL website (TfL website users) – new scale

72 **75** **73** **76**

Mean satisfaction **score** – *converted to a score out of 100 from a mean score out of 10*

	9 or 10
Overall access: 24%	
Desktop/laptop: 32%	
Smartphone: 27%	
Tablet: 33%	

	7 or 8
Overall access: 48%	
Desktop/laptop: 44%	
Smartphone: 45%	
Tablet: 45%	

	0 to 6
Overall access: 28%	
Desktop/laptop: 24%	
Smartphone: 29%	
Tablet: 21%	

Overall access (1080) Access via a Desktop/ laptop (876) Access via a Smartphone (606) Access via a Tablet (367)

⬆ = *Significant increase vs. Autumn 15 at a 95% confidence level*
⬇ = *Significant decrease vs. Autumn 15 at a 95% confidence level*

Over 55's were most likely to be highly satisfied (9-10/10) on a **desktop/ laptop** but **16-34's** were most likely through a **tablet**

I10b. Thinking of the TfL website overall, how satisfied are you with?; I13. how satisfied are you with the TfL website through each of these devices?
Base: TfL website users (Spring 2016 n=1080);

Information provided, tools and ease of use were the key triggers for high or low satisfaction with the TfL website

Reason for TfL website satisfaction rating (TfL website users)

Please note, this was a new question in Spring 2016

Satisfaction rating 7-10 (72%)

Of satisfied users…

Information
Detailed/ good/ up to date information
27%

Tools
Good website/ good tools
17%

Usability
Easy to use/ user friendly/ simple
17%

Satisfaction rating 0-6 (28%)

Of dissatisfied users…

Information
Poor information/ inaccurate/ lacks detail/ not up to date
12%

Usability
Not easy to use/ too complicated / not user friendly
11%

General
Average/ could be better/ room for improvement
10%

I10c. You rated your satisfaction with the TfL website as [...] out of 10. Please explain your reason for this rating, in as much detail possible.
Base: TfL website users (Spring 2016 n=1080; 7-10 n=780; 0-6 n=300)

In particular, the availability and accuracy of information and website navigation were key to website satisfaction,

Reason for TfL website satisfaction rating (TfL website users)

Satisfaction rating 7-10
(72%)

Satisfaction rating 0-6
(28%)

"It's very detailed, easy to use and clear but sometimes there are disruptions which are not reflected on the website."
[Female, 16-24]

"'The journey planner misses too much out and won't allow you to have two screens open. It's a job trying to find oyster info. like fare details for "
[Male, 55-64]

"I can always get the information I am looking for I do not know how we managed before"
[Female, 70-74]

"'Broken links, searches going nowhere, impossible to find the information you want "
[Male, 35-44]

"Nice and easy to use with clear fonts"
[Male, 45-54]

"'The new journey planner is rubbish. the times displayed for Tube departures are often incorrect"
[Female, 25-34]

"It is generally very good for planning journeys"
[Female, 35-44]

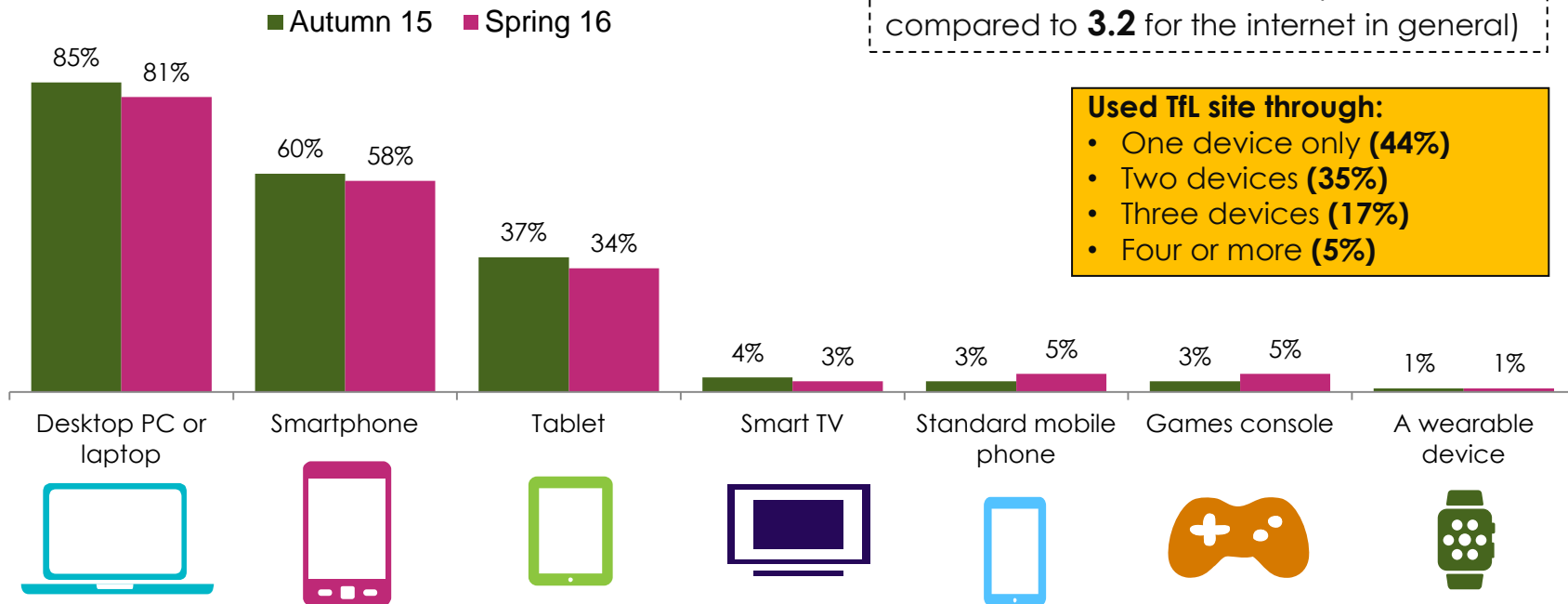*"'Bus times are unreliable"*
[Male, 45-54]

I10c. You rated your satisfaction with the TfL website as [...] out of 10. Please explain your reason for this rating, in as much detail possible.
Base: TfL website users (Spring 2016 n=1080; 7-10 n=780; 0-6 n=300)

The TfL website was mainly accessed through a PC/ laptop, however six out of ten TfL website users accessed the site via a smartphone

Devices used to access the TfL website (TfL website users)

As in Autumn 15, on average the TfL website is accessed on fewer devices (**1.9** devices, compared to **3.2** for the internet in general)

Used TfL site through:
- One device only **(44%)**
- Two devices **(35%)**
- Three devices **(17%)**
- Four or more **(5%)**

Legend: ■ Autumn 15 ■ Spring 16

Device	Autumn 15	Spring 16
Desktop PC or laptop	85%	81%
Smartphone	60%	58%
Tablet	37%	34%
Smart TV	4%	3%
Standard mobile phone	3%	5%
Games console	3%	5%
A wearable device	1%	1%

I12a. Which of the following devices do you use to access the TFL website?
Base: TfL website users (Spring 2016 n=1080; Autumn 2015 n=896)

Other TfL sources

The majority had seen the various digital displays when travelling, particularly Tube countdown display and bus countdown timers

Live digital displays (online Londoners)

Please note: Figures are based on all online Londoners and use of each mode of transport varies by age and so this should be considered when looking at this data

Bus Countdown display		Tube Countdown display		Next stop display		Electronic displays in Tube stations	
Ever seen	**Regularly use**	**Ever seen**	**Regularly use**	**Ever seen**	**Regularly use**	**Ever seen**	**Regularly use**
79%	66%	81%	59%	70%	47%	57%	30%
Use regularly by age		**Use regularly by age**		**Use regularly by age**		**Use regularly by age**	
16 – 34	63%	16 – 34	68%	16 – 34	46%	16 – 34	34% 🔻
35 – 54	61%	35 – 54	58%	35 – 54	42%	35 – 54	27%
55+	59%	55+	45%	55+	43%	55+	18%

F1. Which of the following have you ever seen when travelling in London?;
F2. Which do you regularly use to help plan your journey when travelling in London?
Base: Total sample Spring 16 (n=1192)

🔺 = *Significant increase vs. Autumn 15 at a 95% confidence level*
🔻 = *Significant decrease vs. Autumn 15 at a 95% confidence level*

Again a number of other TfL sources were used for obtaining travel information in London, in particular staff

Other TfL sources of information used (online Londoners)

Sources used for real-time travel information

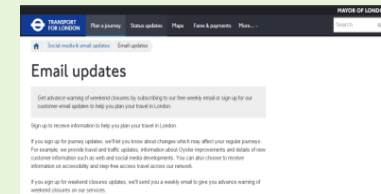**49%** ever use staff when travelling (**54%** in Autumn 15) ↓

39% ever use bus times text service (**39%** in Autumn 15)

20% ever use TfL's Twitter feed when travelling (**21%** in Autumn 15)

Email

Over half **(53%)** have received a TfL email with travel related information (**55%** in Autumn 15)

Majority **(93%)** find these emails useful (**91%** in Autumn 15)

Older online Londoners were again using more traditional formats such as announcements, displays and staff more

Other TfL sources of information used (online Londoners)

⬆ = *Significant increase vs. Autumn 15 at a 95% confidence level*
⬇ = *Significant decrease vs. Autumn 15 at a 95% confidence level*

Older Londoners were reliant on announcements/ displays and staff while travelling *(Use real-time travel information)*:

Announcements/ displays:
- 16-34 = 42% (47% in Autumn 15)
- 35-54 = 57% (59% in Autumn 15)
- 55+ = 74% (70% in Autumn 15)

Staff:
- 16-34 = 27% (41% in Autumn 15) ⬇
- 35-54 = 42% (42% in Autumn 15)
- 55+ = 49% (51% in Autumn 15)

RT2. Thinking about the various means of obtaining information about problems or delays encountered during your journey in London, which of these do you use...?
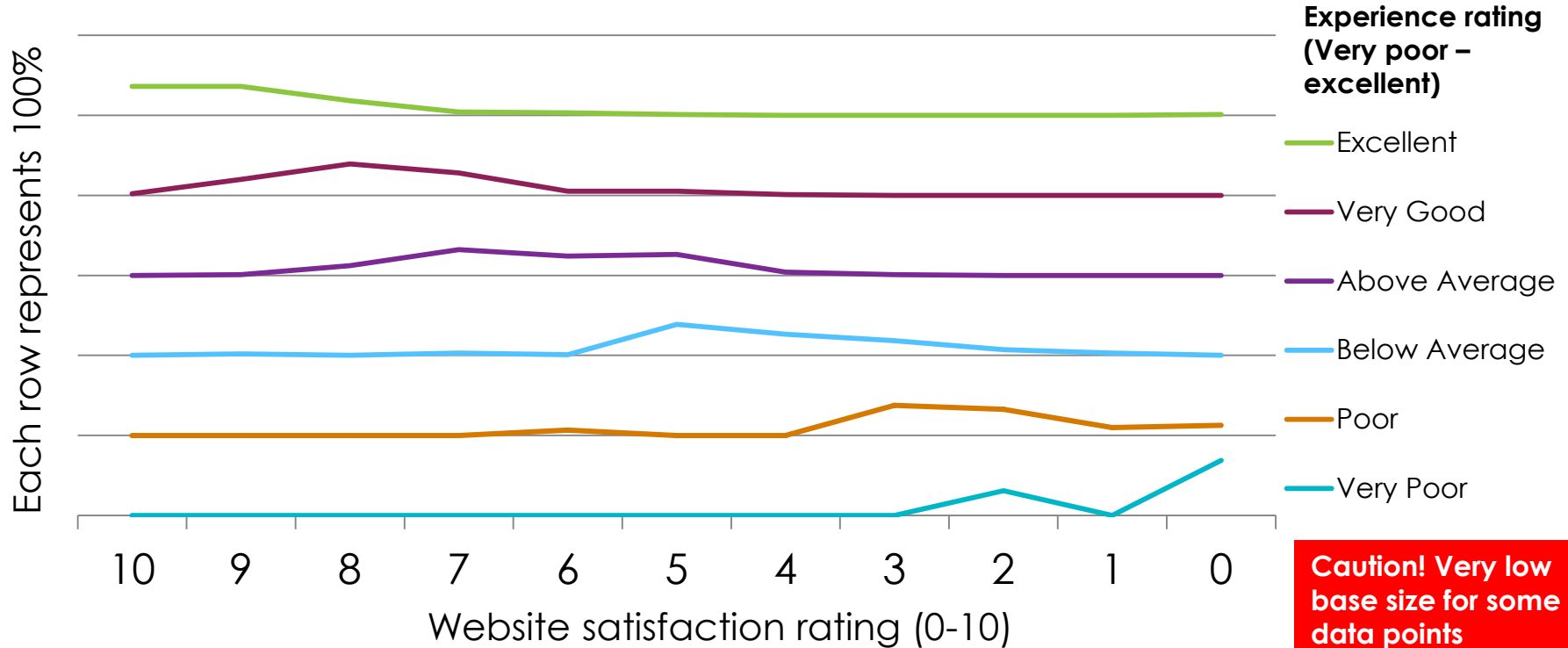*Base: All accessing real time travel information (16-34 n=352; 35-54 n=403; 55+ (n=288)*

Appendix

Satisfaction ratings compare well at the end of the scales, however reasonable overlap exists around the 'average'

Experience rating (Very poor – excellent)

Excellent

Very Good

Above Average

Below Average

Poor

Very Poor

Website satisfaction rating (0-10)

Each row represents 100%

Caution! Very low base size for some data points

Each line represents the % giving each score on the satisfaction question based on their score from the experience question e.g. 69% of those rating 'very poor' rated '0' at the satisfaction question

Thank you