

Transport for London

Digital and Social Media  
Monitor  
October 2012  
TfL number: 12093  
SPA FT number: 1428

MAYOR OF LONDON

Transport for London





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# Contents

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→ Summary	5
→ Internet access	10
→ Internet access via mobile device	16
→ TfL website use	25
→ Journey information services	30
→ Apps	35
→ Social Media	38
→ Appendix on methodology	42

## Reporting note

TfL project numbers for the previous four waves of this research are: 08204 (2009), 09092 (2010), 10058 (2011) and 11057 (January 2012)

Throughout this report, data from October 2012 are compared with previous waves of research. Caution must be taken when comparing the October 2012 wave with previous studies carried out in January or February as there may be a seasonal effect on the data. Unless stated otherwise, statistically significant differences with previous waves are shown as follows:



Significantly higher in October 2012



Significantly lower in October 2012



# Objectives and methodology

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## Monitoring the trends 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
- Use mobile phones and other devices
- Use mobile devices to access information online
- Use the TfL website
- Use journey planning services, apps and social media

## Methodology

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



# Summary

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# Internet use

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## Internet access

- Almost nine in ten Londoners have access to the internet at some place (89%). This level of internet access has remained consistent over the past two years and is significantly higher than levels seen in 2010 (86%) and 2009 (85%)
  - Most Londoners have access at home (87%), with 56% having access “on the move” and half having access at work (50%)
- Londoners over 65 years old, disabled people and those in the DE socio-economic group continue to be more likely than others not to have internet access
- 90% of Londoners that access the internet at work or at home do so daily, with 76% of those who access the internet on the move doing so on a daily basis

## Activities undertaken online

- Sending and receiving emails and finding/sourcing information continue to be undertaken by almost all those with internet access (94% and 89% respectively), however the proportion finding/sourcing information online has dropped significantly
- 83% of internet users are using the internet for maps and directions, 76% to access live public transport information online and 65% to make day to day travel plans



# Internet use

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## Internet access via a mobile device

- There has been strong growth in mobile internet usage in 2012, including increases in the **proportion** of Londoners using mobile devices which are able to access the internet and the **frequency** of use and **range of activities** carried out via mobile internet. Now around half of Londoners (49%) access mobile internet everyday
- Two thirds of Londoners (67%) now use a smartphone of some type (significantly up from 58% in January 2012)
  - 33% are using an iPhone to access the internet, higher than Android (21%) and Blackberry (18%) smartphones
  - Users of iPhone tend to use their mobile more often and in more locations than other types of phones
- Use of tablet computers continues to grow, as 19% claim to use tablets this wave compared to 13% in January 2012
- Two thirds of Londoners (63%) access the internet via a mobile device at least once a month, with half (49%) doing so everyday
- Accessing travel information via a mobile device has become more popular with 73% of mobile internet users accessing live public transport information and 62% making day to day travel plans via a mobile device, showing a significant increase compared to January 2012 (when the percentages were 64% and 50% respectively)
- When comparing Internet activities undertaken on mobile devices to general internet activities they follow a similar pattern except for those relating to purchases/finance or which require large data downloads – where use is generally lower on mobile devices
  - Apps, social networking and playing games are relatively higher on mobile devices than general internet use



# TfL's website and journey information

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

- Three quarters of Londoners (77%) use TfL's website, with two thirds of Londoners (67%) using it at least once a month
- Older Londoners and those from the DE socio-economic group are less likely to use TfL's website, even when taking into account their lower than average internet access
- 90% of Londoners in full time work use the TfL website, compared with 82% of those working part time and just 60% 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 and those not in work)
- The proportion of Londoners using TfL's website via mobile continues to increase (46% October 2012, 32% January 2012, 27% January 2011)
  - 45% 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 (66%), with 28% accessing the site from home and only 6% from work/education





# Social media and app usage

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## Journey information services

- Amongst Londoners who can access the internet, staff / announcements / displays are still the most used source of London travel information, used by 54% of online Londoners, closely followed by TfL's website on a mobile device, used by 51% of online Londoners
  - However, when asked what sources they are likely to use in the future, 84% of online Londoners say they would use TfL's website on a mobile device, which is higher than for non-TfL websites (61%). There is also very high claimed likelihood to use apps, Twitter and Facebook in the future for London transport information (around 90% of online Londoners)
- The majority of those who accessed London travel information online do so at home (65%) and mobile phones are the most used device (67% "ever used" compared to 61% using PC's /Laptops)
- TfL still leads the way for obtaining information about problems or delays encountered during journeys in London with 35% of Londoners using the TfL website on a mobile device for this purpose (up from 25% in 2011). Non-TfL websites that feature live London travel news have lost users for this purpose (23% in 2011, 13% this wave)

## Social media use

- Facebook is the most popular form of social media amongst Londoners who use social media and networking sites (at 83%), with Twitter at 28%

## App use

- Of the 62% of mobile phone users who use apps, 47% always prefer to use apps (as opposed to websites) compared to 23% who always prefer to use websites, while 30% sometimes use apps and sometimes use websites
  - The main reasons for deciding to use an app or a website are ease of use and speed



# Internet access

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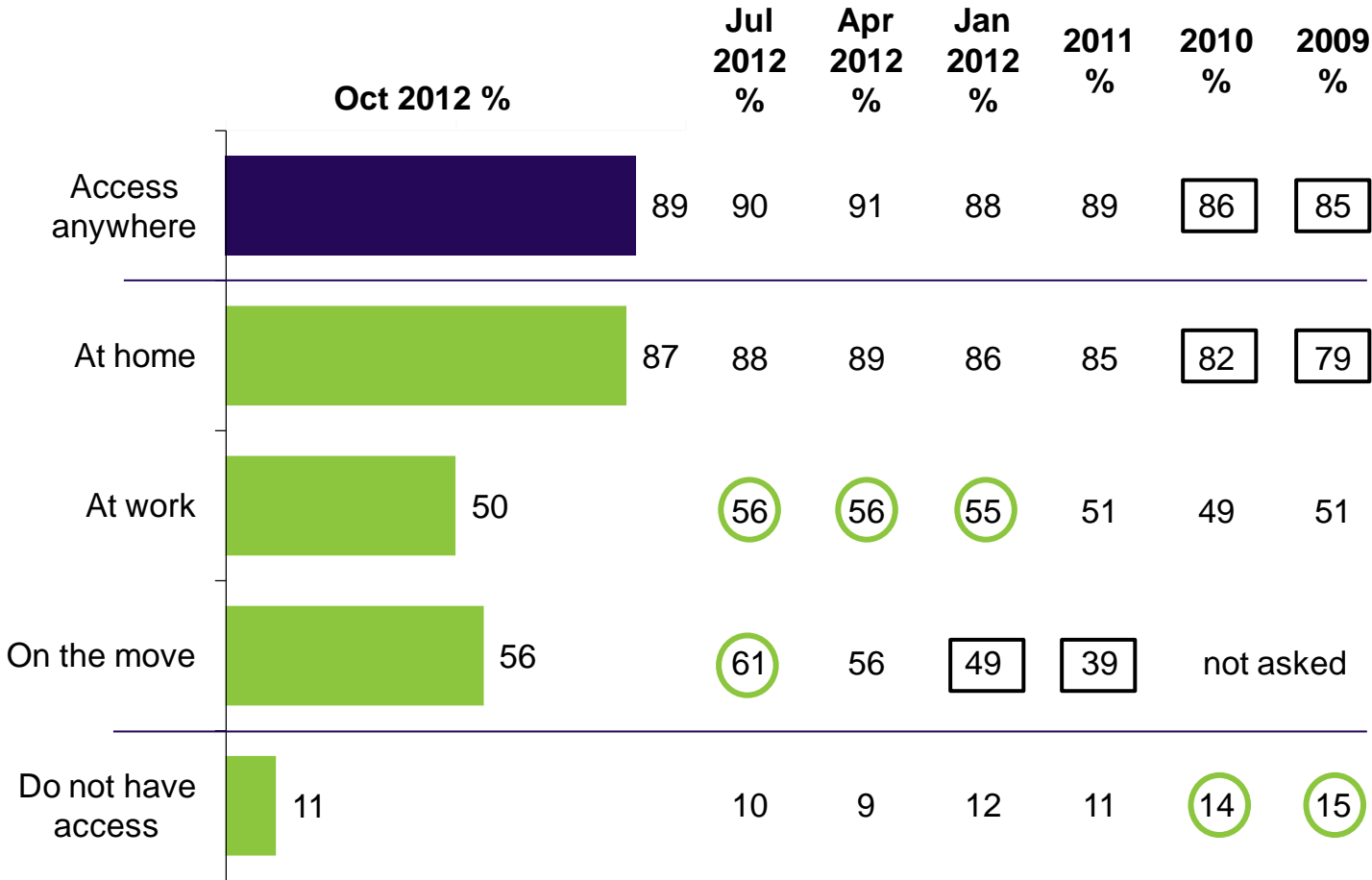




# Internet access

Overall internet access seems to have reached a plateau

Over half of Londoners access the internet on the move



**90%** of Londoners that access the internet at work or at home do so daily, with 76% of those who access the internet on the move doing so on a daily basis

For comparison: ONS data shows London internet access for Q2 2012 was 88%

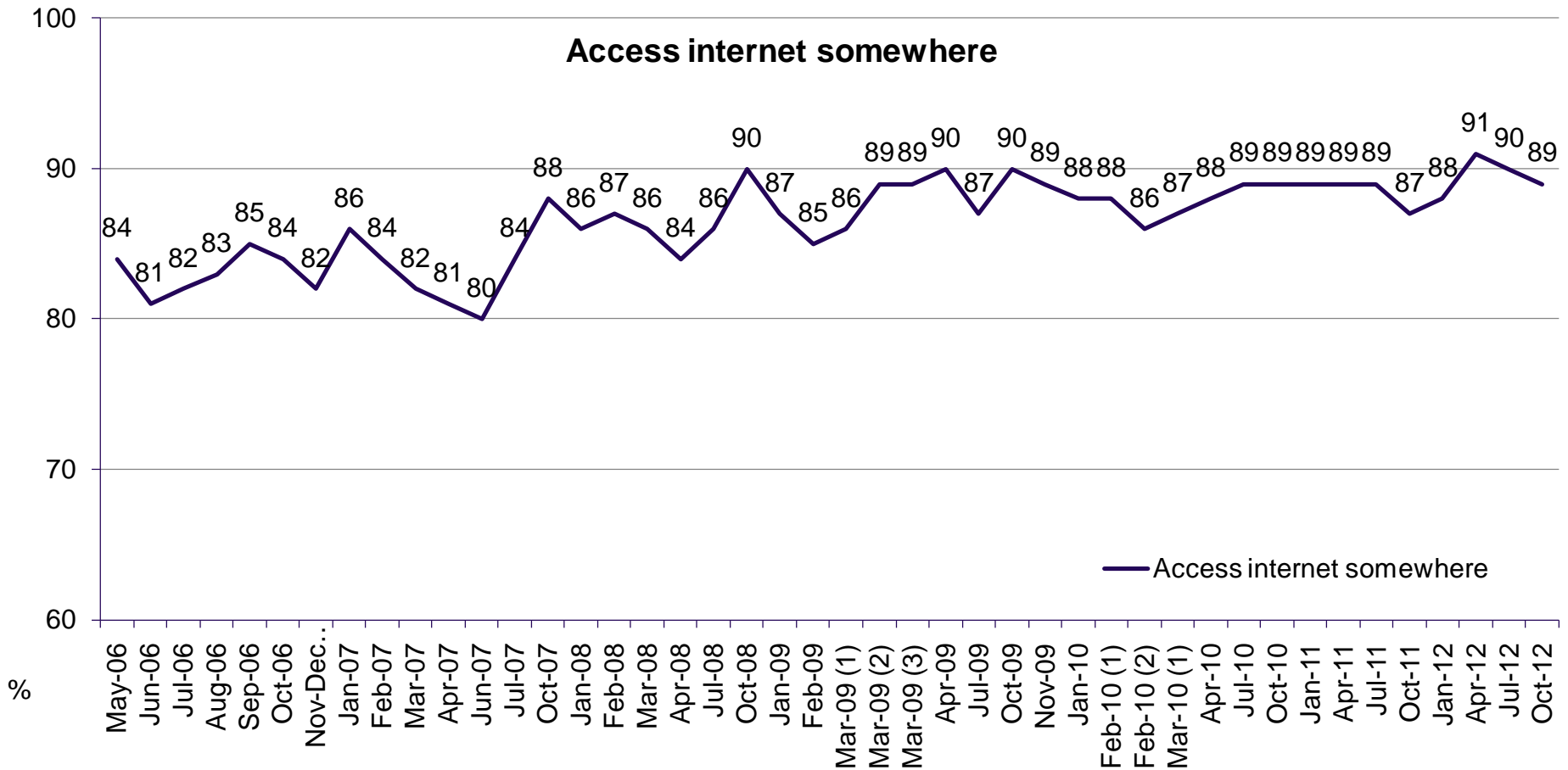
○ Significantly higher than October 2012  
 □ Significantly lower than October 2012

QINTER1 Do you access the internet...?

Base: All (October 2012 1,027; July 2012 1,021; April 2012 1,006; January 2012 1,000; 2011 1,002; 2010 1,000; 2009 1,005)

# ➔ Trend in internet access

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



QINTER1 Do you access the internet...?

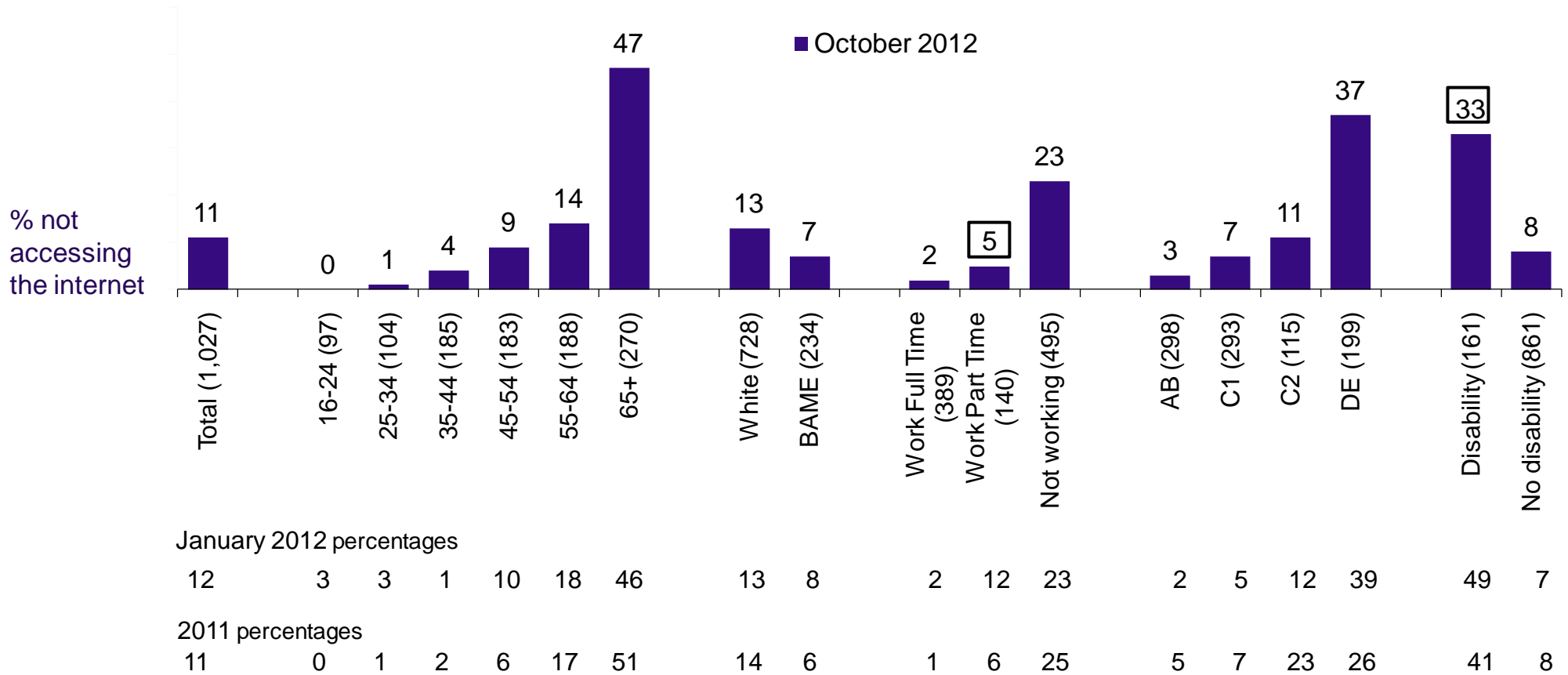
Base: All respondents (at least 1,000 per wave) – all surveys containing QINTER1



# Profile of non-users of the internet

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

The proportion (of non-users of the internet) is still much higher among disabled people than among non-disabled people



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

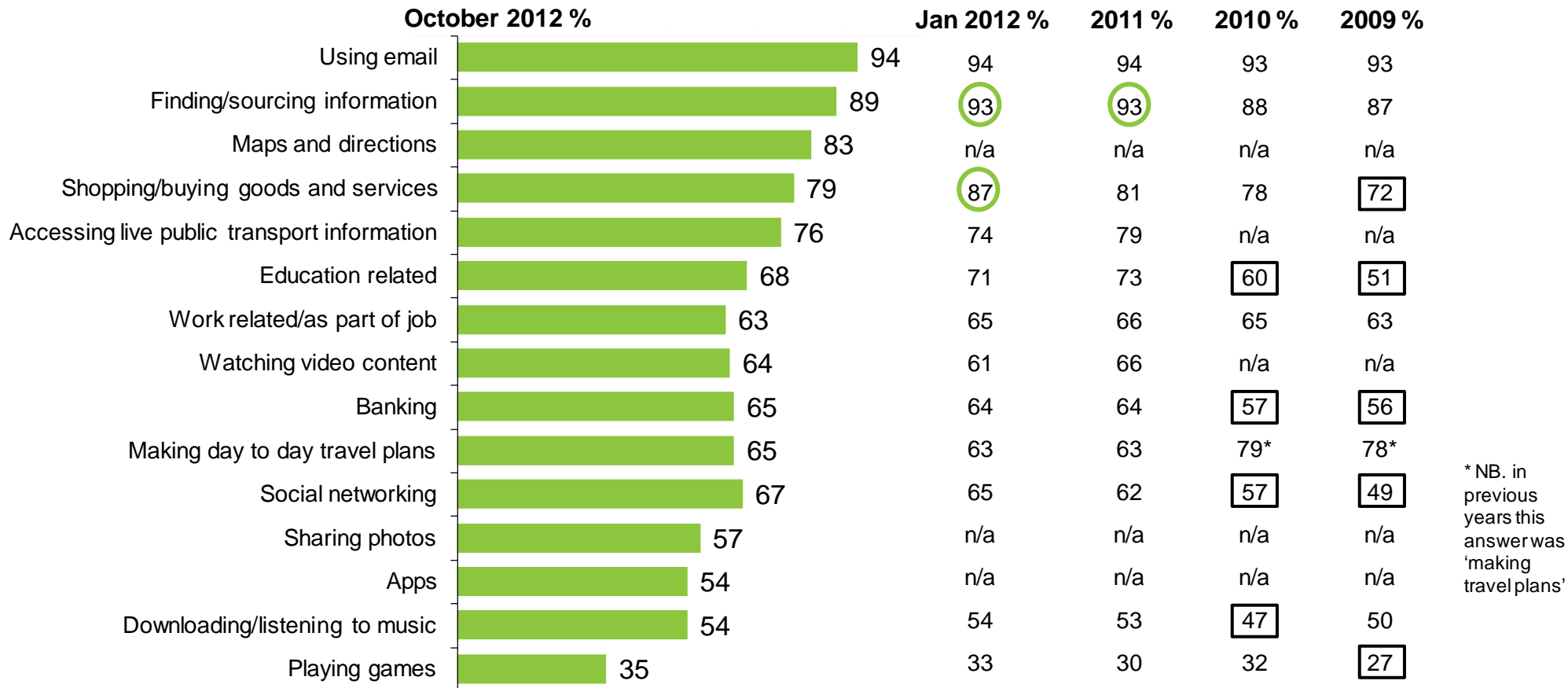
○ Significantly higher in October 2012 than in January 2012  
□ Significantly lower in October 2012 than in January 2012



# Internet activities

The proportion buying goods and services online has dropped since January 2012, but this may be a seasonal effect

Three quarters (76%) of internet users check live public transport information (relatively stable compared to 74% in January 2012 and 79% in January 2011)



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

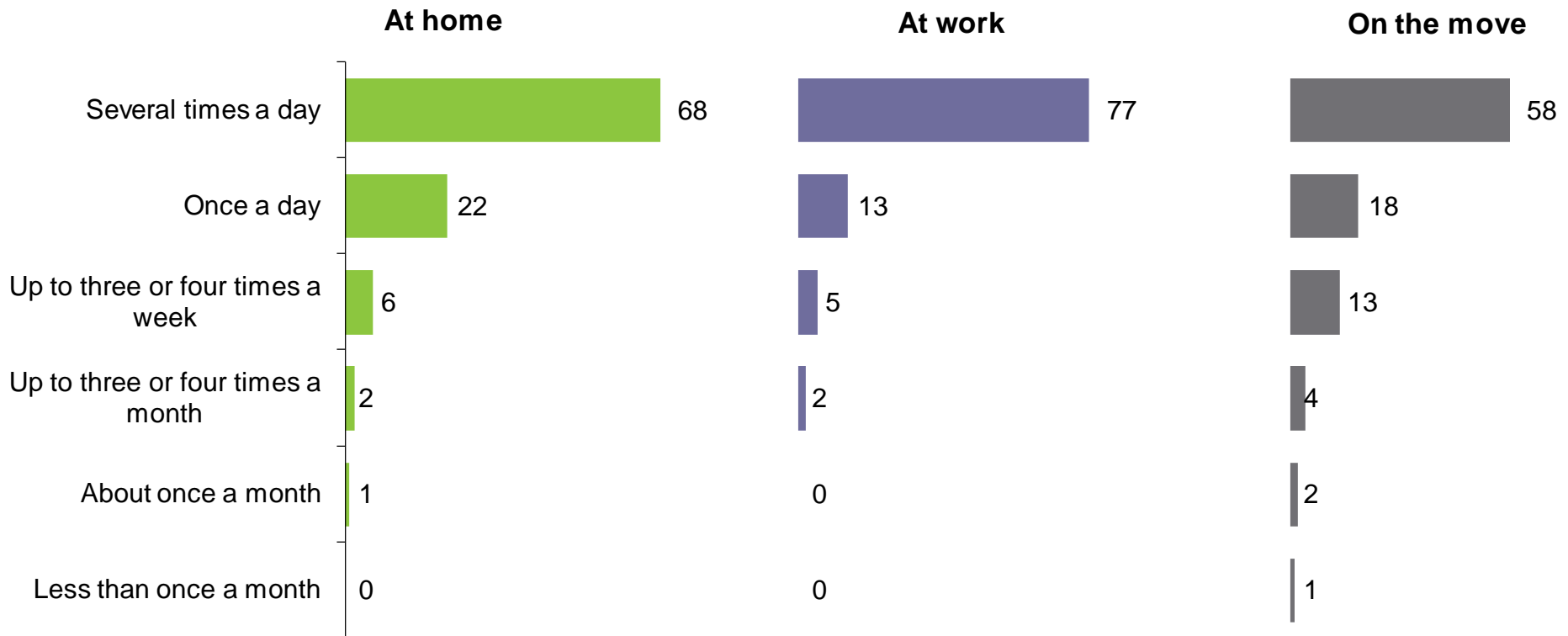
EMU3: You mentioned that you access the internet. Which of the following do you use the internet for?  
 Base: All with internet access (October 2012 846; January 2012 883; 2011 841; 2010 803; 2009 847)

○ Significantly higher than October 2012  
 □ Significantly lower than October 2012



# Frequency of Internet access by location

90% of Londoners that access the internet at work or at home do so daily, with 76% of those who access the internet on the move doing so on a daily basis



EMU1a/b/c: How often do you access the internet at home / at work / on the move?

Base: All respondents who access the internet at home (833), at work (417), on the move (452)



# Internet access via mobile device

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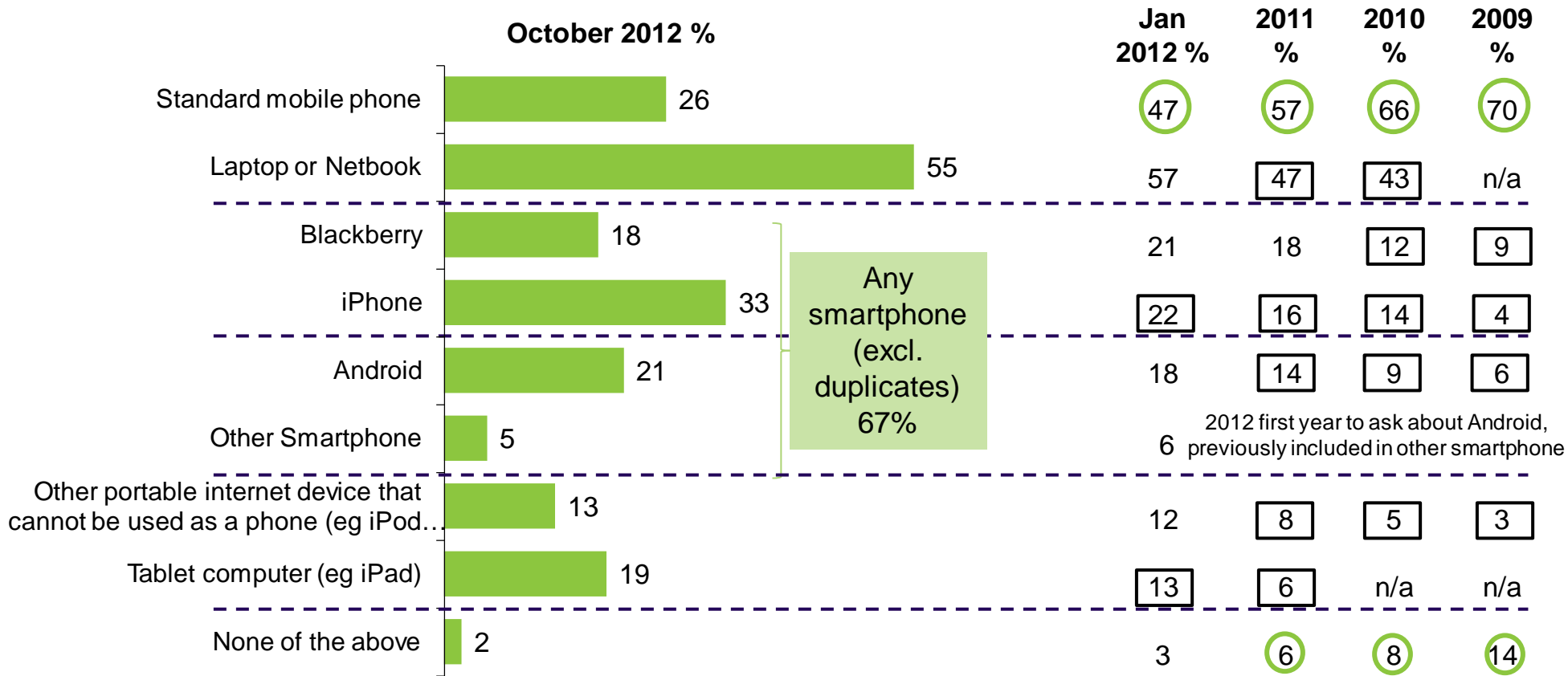




# Use of mobile devices

## Two thirds of Londoners (67%) use a smartphone

Although tablet users are still in the minority, there are three times as many than in January 2011



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

Base: All respondents (October 2012 1,027; January 2012 1,000; 2011 1,002; 2010 1,000; 2009 1,005)

○ Significantly higher than October 2012

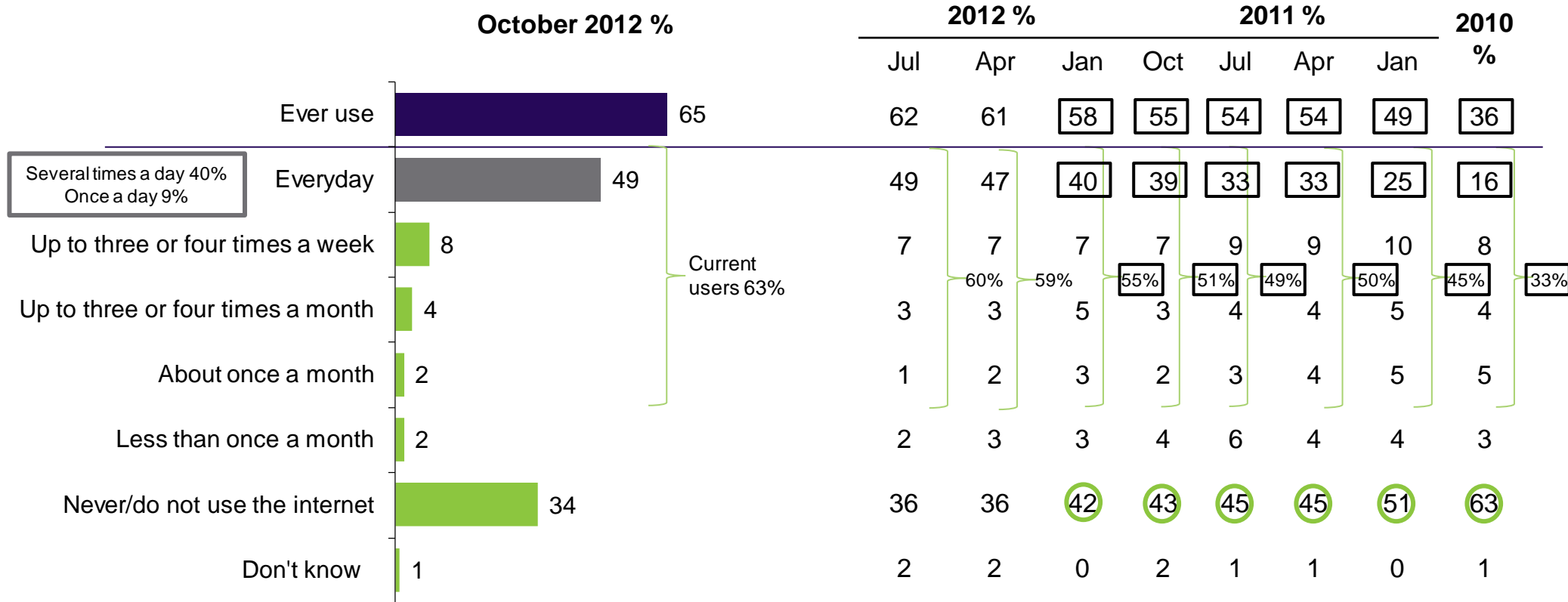
□ Significantly lower than October 2012



# Internet access via a mobile device

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

49% 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)

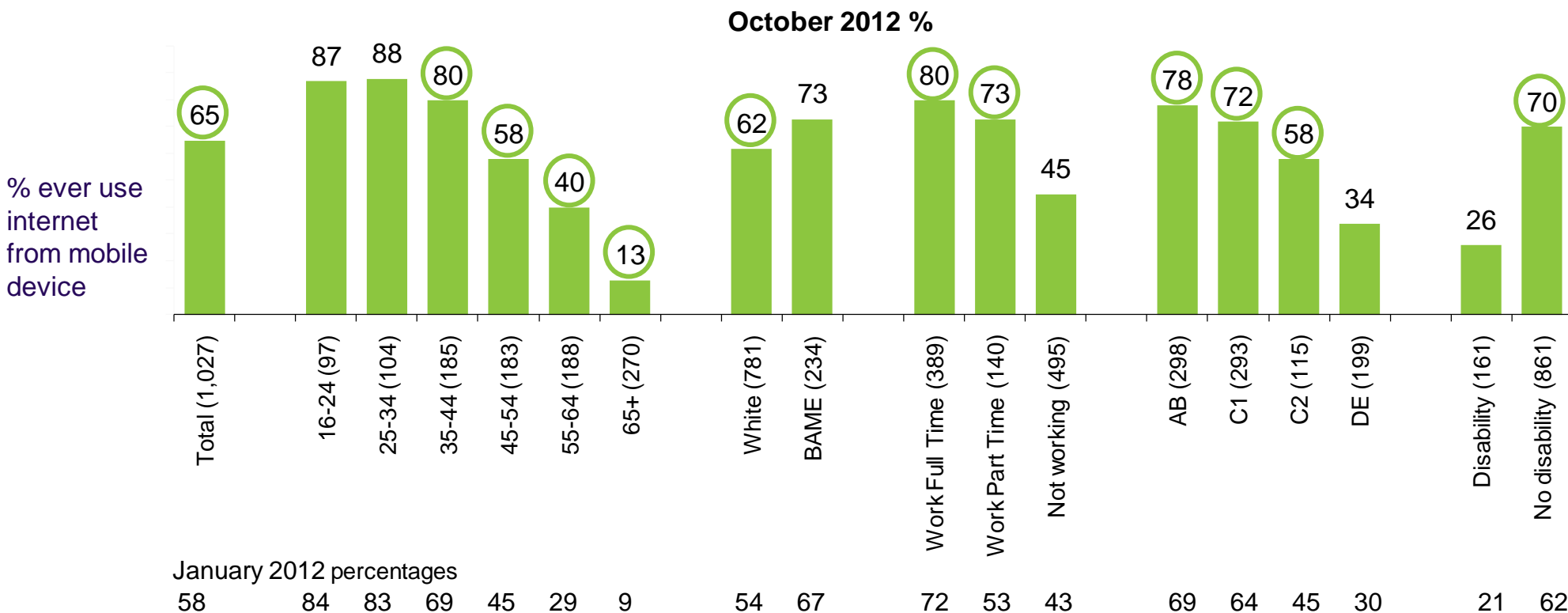
○ Significantly higher than October 2012  
 □ Significantly lower than October 2012



# 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 DE 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

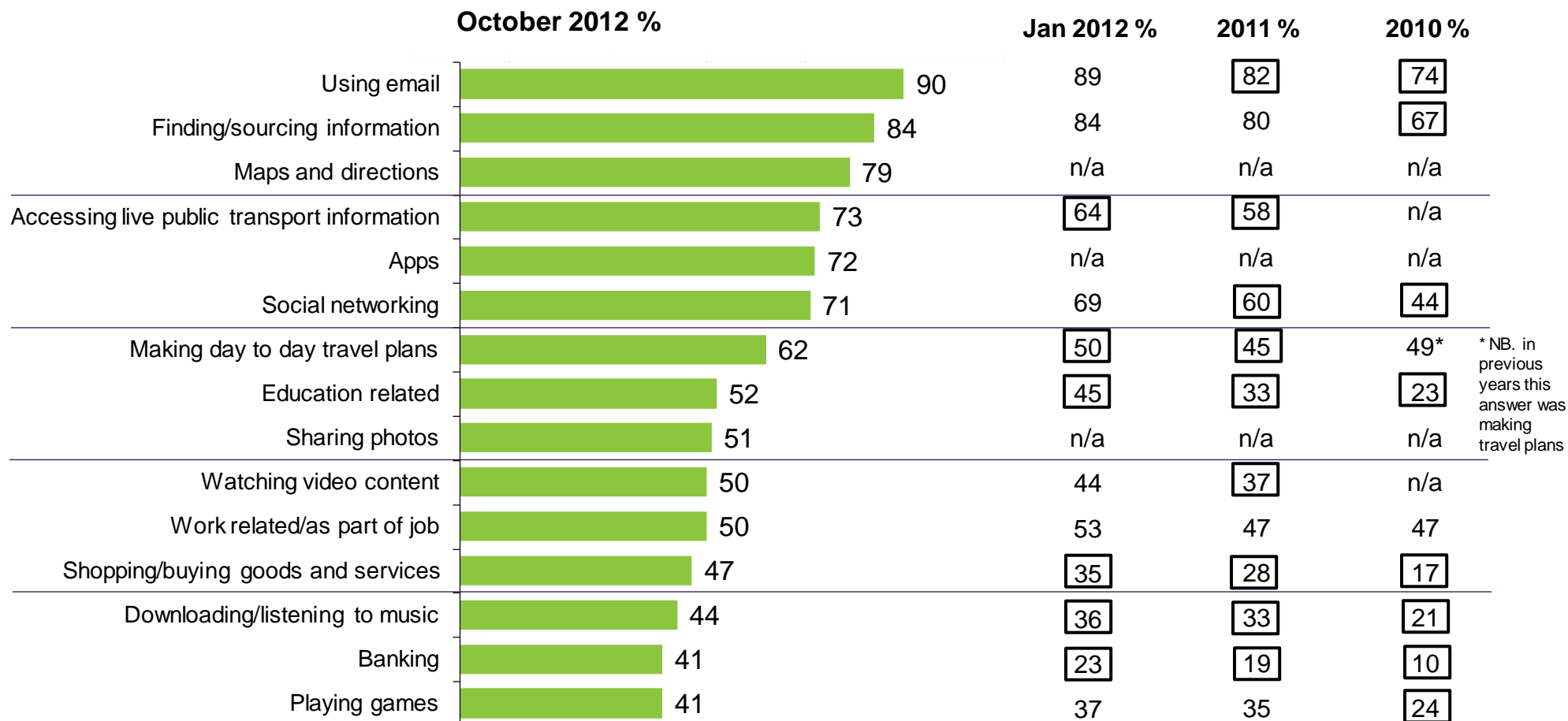
Significantly higher in October 2012 than in January 2012



# Activities accessed on mobile devices

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

Accessing live public transport information and making day to day travel plans have significantly increased since January 2012. Nearly three quarters access apps on their mobile device



\* 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 (Oct2012 513, Jan 2012 460; 2011 400; 2010 279)

Significantly lower than October 2012



# Where use mobile devices to access internet

iPhones are used in more places than other mobile devices to access the internet, followed by Android phones

As expected mobile devices are used primarily on the move, with limited use at work

% location ever used mobile device to access internet

	iPhone	Blackberry	Android	Other Smartphone*	Other Mobile Phone*	Laptop/Netbook	Tablet
On the move	91%	74%	88%	83%	53%	95%	90%
At home	73%	63%	65%	55%	50%	25%	28%
At work	53%	40%	43%	30%	13%	12%	18%



% location used most often to access internet from mobile device

	iPhone	Blackberry	Android	Other Smartphone*	Other Mobile Phone*	Laptop/Netbook	Tablet
On the move	65%	58%	59%	68%	51%	85%	84%
At home	25%	29%	30%	26%	44%	14%	11%
At work	10%	13%	10%	6%	5%	1%	5%

\* caution - small base size

EMU7c/d: Do you use your mobile device to access the internet on the move / at home / at work / Where do you access the internet most often on your mobile device?

Base All respondents who use each mobile device: iPhone (242), Blackberry (133), Android (158), Other Smartphone (41\*), Other Mobile Phone (78), Laptop/Netbook (358), Tablet (149)



# Frequency of using mobile devices to access internet

iPhone users are more likely to access the internet more frequently than other mobile device users

Those who have “other mobile phones” are significantly less likely to use their device to access the internet



	iPhone	Blackberry	Android	Other Smartphone*	Other Mobile Phone*	Laptop/Netbook	Tablet
Ever use	98%	87%	98%	88%	45%	99%	98%
Several times a day	71%	48%	67%	44%	7%	61%	53%
Once a day	15%	11%	11%	17%	5%	22%	19%
Up to 3 or 4 times a week	7%	14%	10%	13%	9%	10%	17%
Less often	5%	14%	11%	14%	24%	6%	9%
Never use	2%	13%	2%	12%	55%	1%	2%

% frequency of mobile device usage to access the internet

\* caution - small base size

EMU7b/c: How often do you use your mobile device to access the internet / Do you use your mobile device to access the internet on the move / at home / at work ?

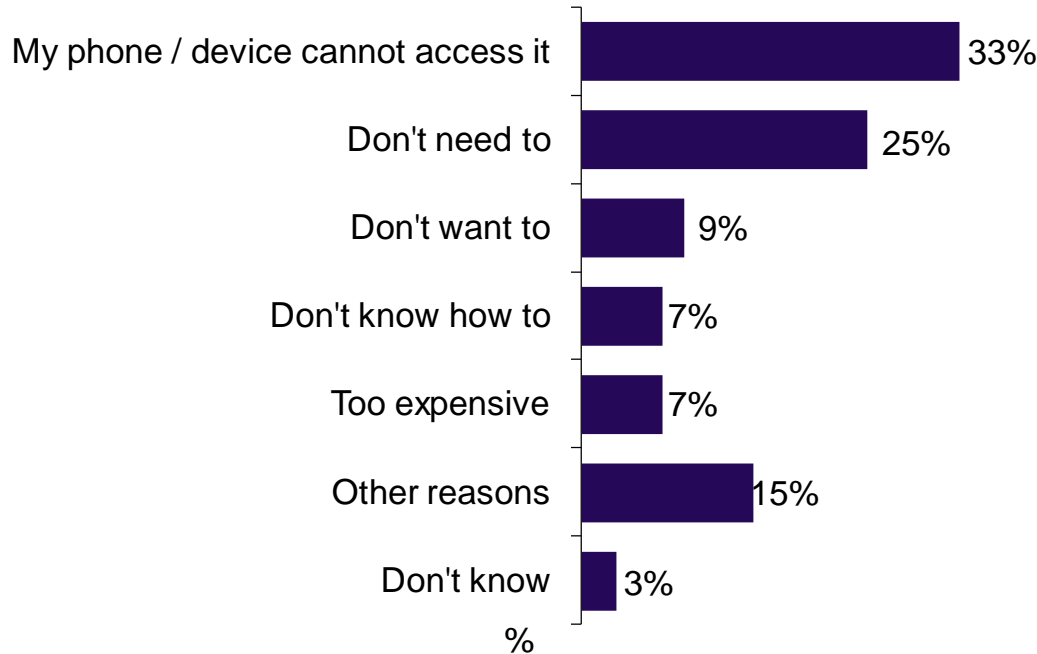
Base All respondents who use each mobile device: iPhone (242), Blackberry (133), Android (158), Other Smartphone (41\*), Other Mobile Phone (78), Laptop/Netbook (358), Tablet (149)



# Reasons for non-use

A third of those who don't use their mobile device to access the internet say it is because their mobile device cannot access the internet and another third say they “don't need to /don't want to”

**Reasons for not using mobile device to connect to the internet**



26% of Londoners surveyed claimed that they had a standard mobile phone

EMU7a: Why don't you use your mobile device to access the internet?

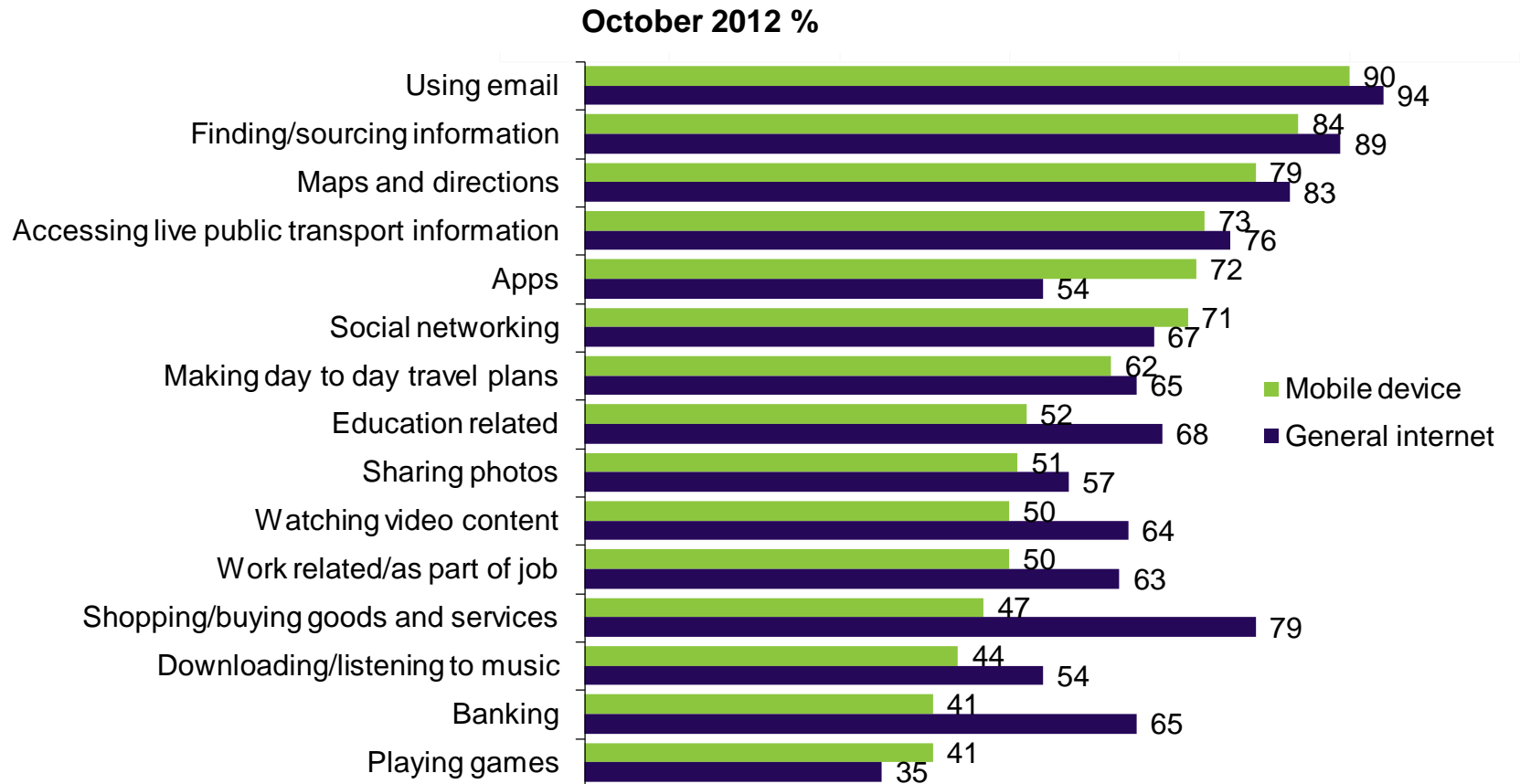
Base All respondents who have a portable device but don't use it to connect to the internet (302)



# 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 education related 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 (Oct2012 513)

EMU3: You mentioned that you access the internet. Which of the following do you use the internet for?

Base: All with internet access (Oct2012 846)





# TfL website use

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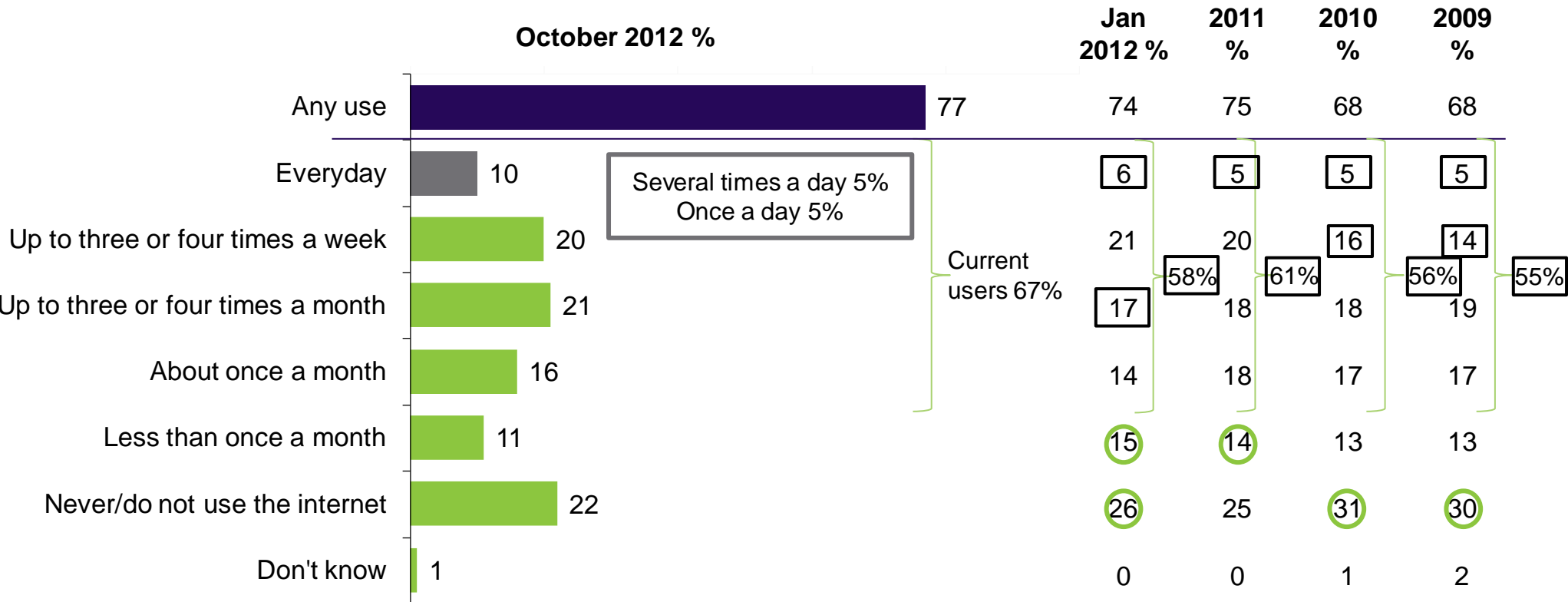




# Use of TfL's website

## Over three quarters of Londoners use TfL's website

The proportion of current users (at least once a month) has significantly increased, as has those claiming to use TfL's website everyday



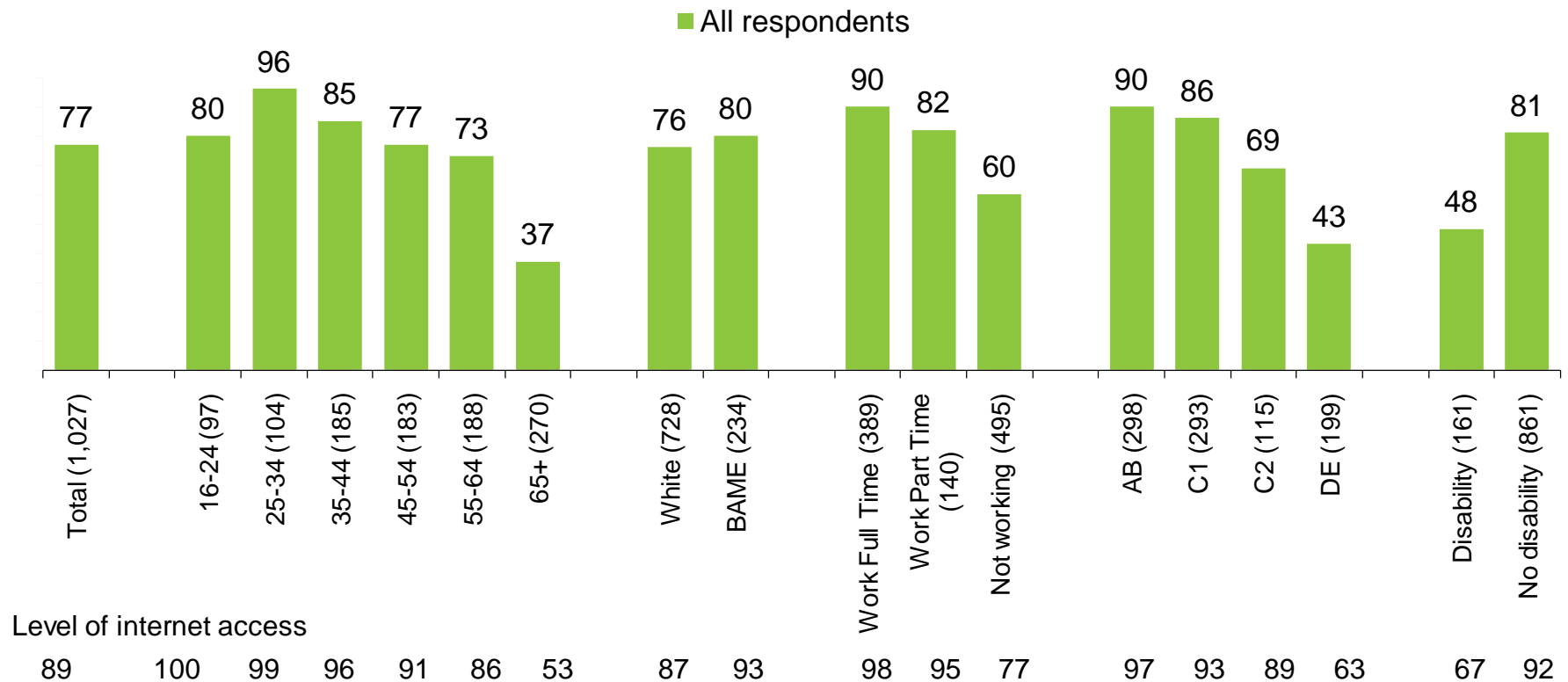
EMU5: How often do you use the TfL website, this includes the Journey Planner, Oyster and Congestion Charging websites and through any device (a computer/mobile phone) etc?  
Base: All respondents (Oct 2012 1,027; Jan 2012 1,000; 2011 1,002; 2010 1,000; 2009 1,005)



# Profile of TfL website users

TfL's website is 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, older, DE's and non-working 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?

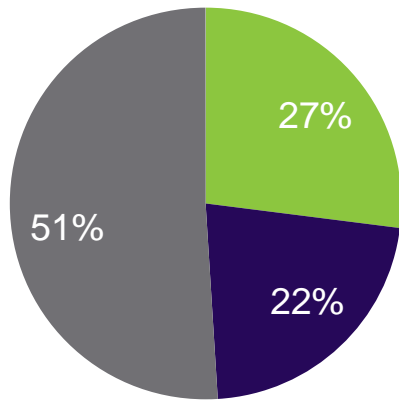
Base: All respondents – base sizes are shown on the chart



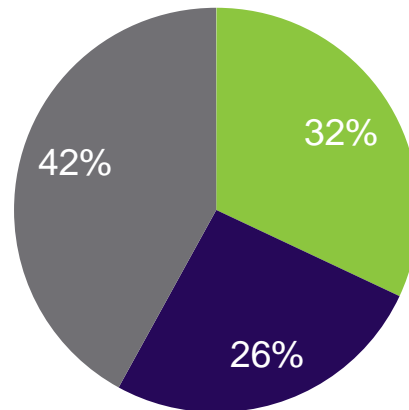
# Usage of TfL's website via mobile device

The proportion of Londoners using TfL's website on a mobile device continues to increase over time and is now nearly half of all Londoners (46%)

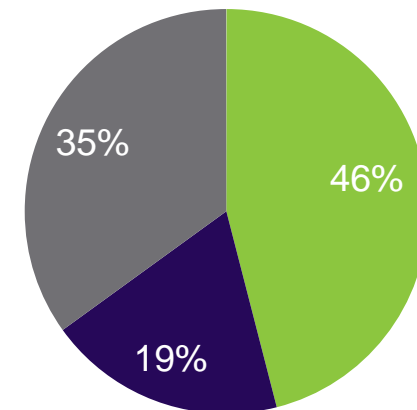
January 2011



January 2012



October 2012



- Ever use TfL on mobile internet
- Ever use mobile internet but not TfL
- Do not use mobile internet

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

Base: All Londoners (c.1,000)

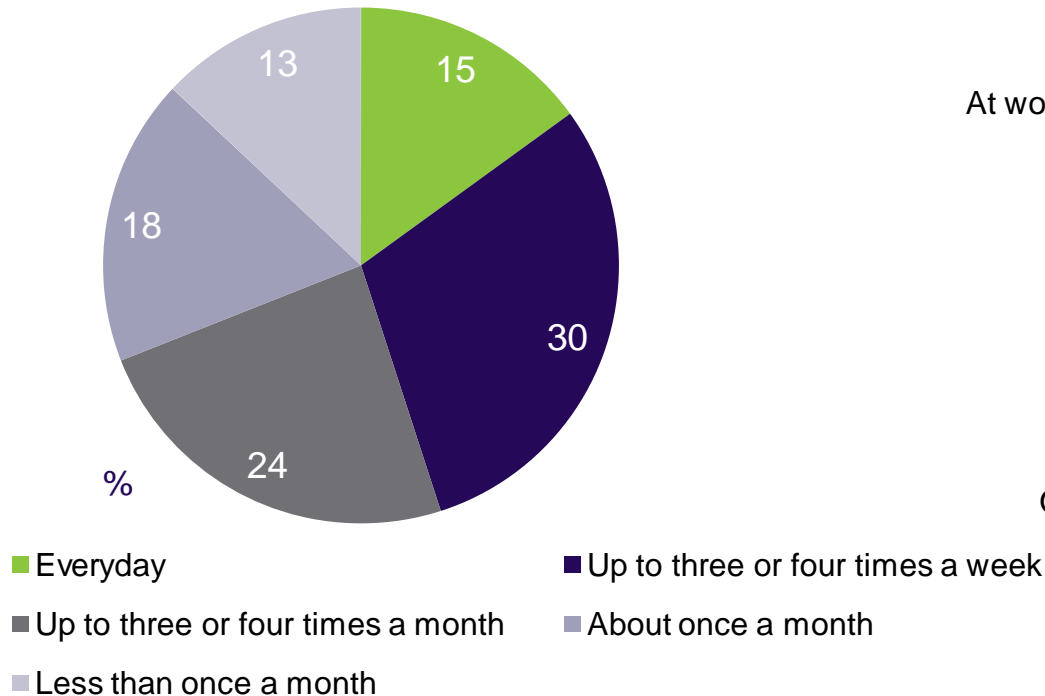


# Accessing TfL's website from a mobile device

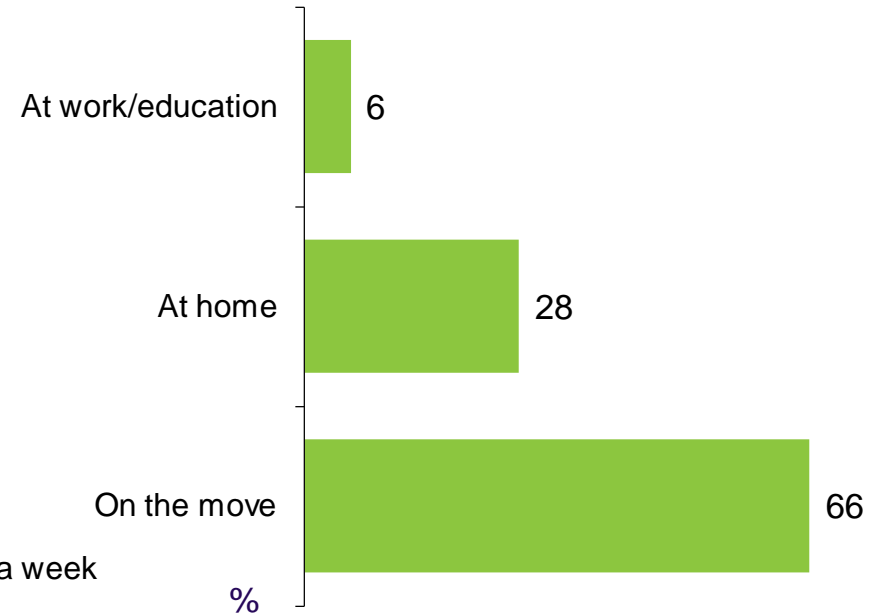
45% of those accessing TfL's website from a mobile device do so at least three or four times a week

Most users access TfL's website from a mobile device when they are on the move, with significantly lower proportions accessing the website 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 that access TfL's website on mobile device (350)

EMU9c: Do you access TfL's website on your mobile device when you are... Base: All that access TfL's website on mobile device (350)



# Journey information services

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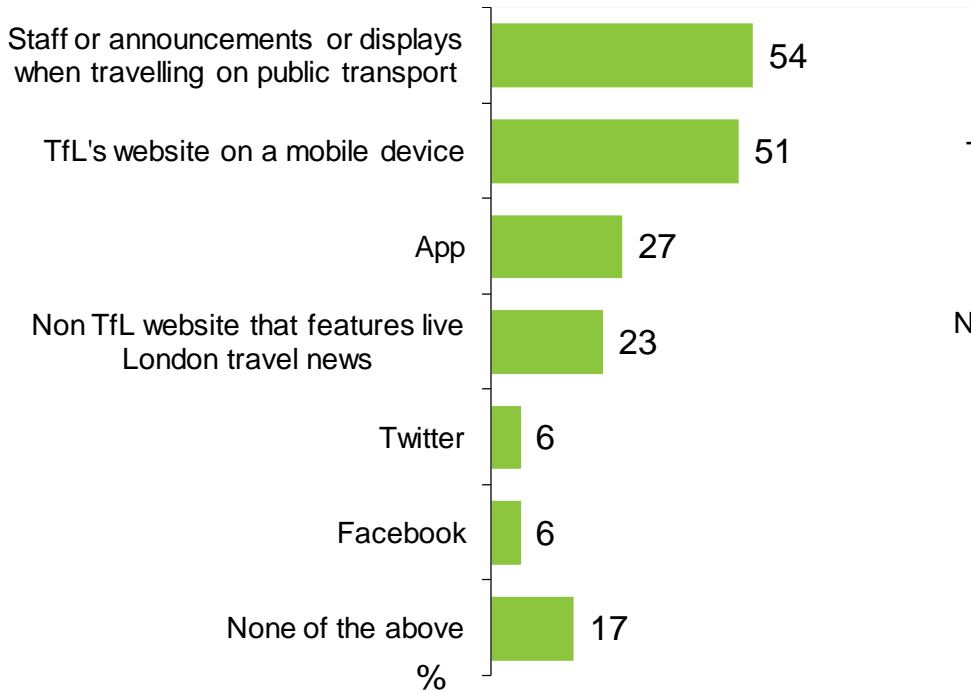


# Sources of London travel information for online Londoners

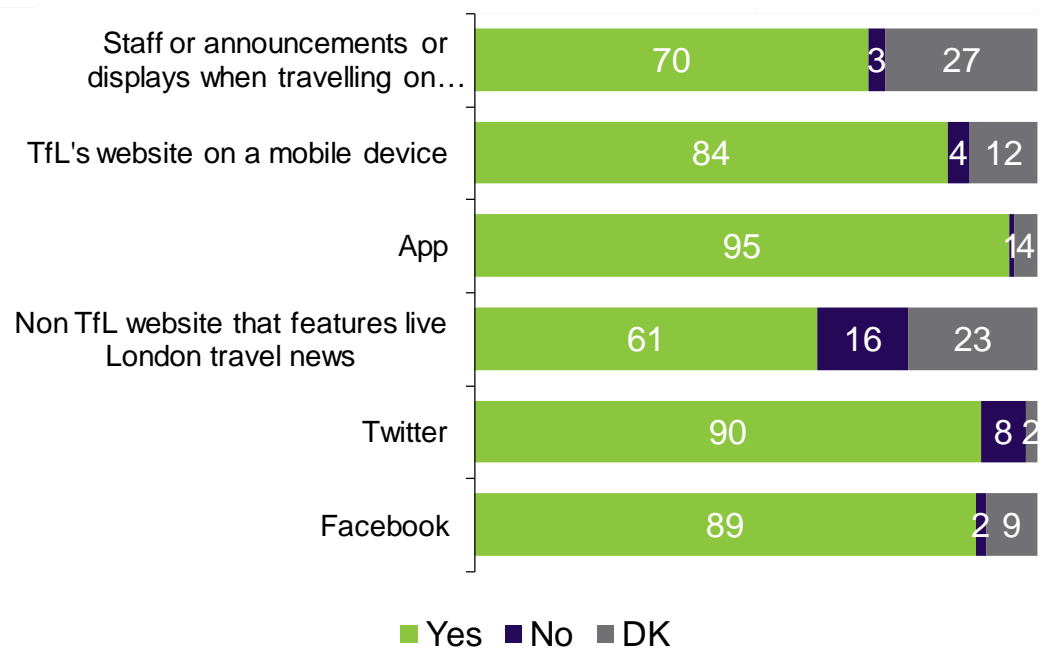
Among online Londoners, staff/announcements/displays lead the way in terms of providing London travel info, closely followed by TfL's website on a mobile device

However 84% of online Londoners say that they are likely to use TfL's website on a mobile device in the future. Around 90% say they are likely to use Twitter and Facebook, and 95% say they are likely to use apps in the future

### Source of London travel information



### Likelihood to use in the future



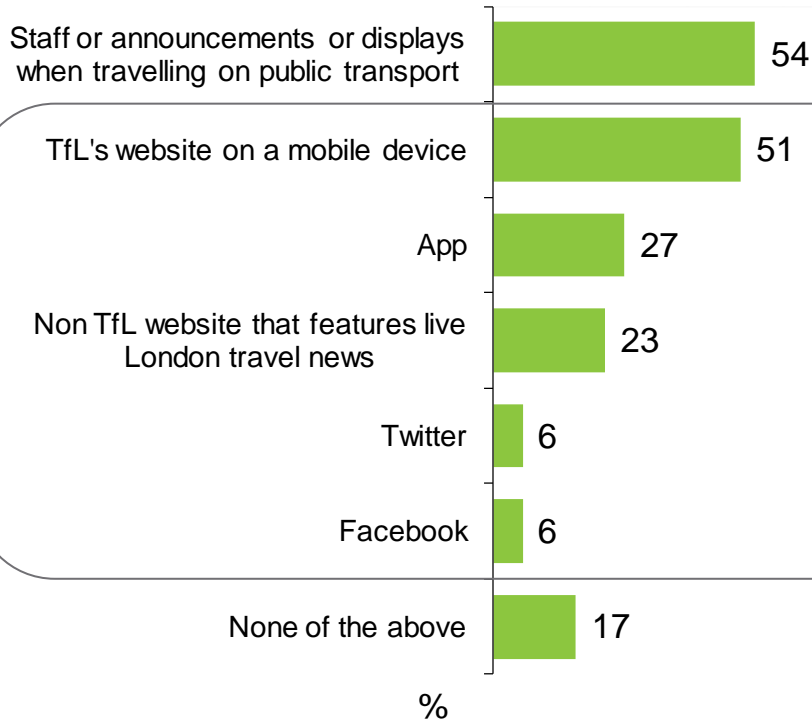
EMUNEW1/1b Which sources of information do you use to access London transport information? / Are you likely to use this in the future?  
Base: All who have access/use the internet or who use mobile phone/other portable internet device (846)



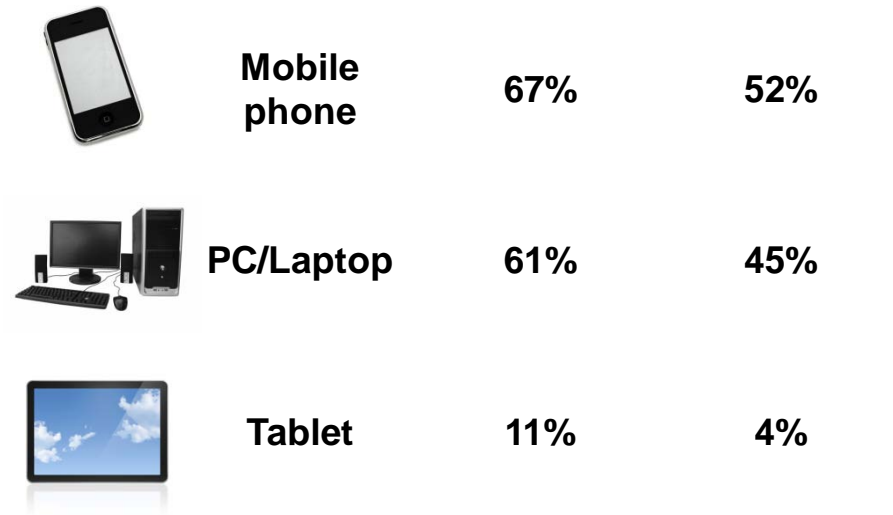
# Device used to access London travel information amongst online Londoners

Mobile phones are the most commonly used devices to source this type of information closely followed by PC's/Laptops

## Source of London travel information



## Device used to access London travel information



EMUNEW1/1c/1d: Which sources of information do you use to access London transport information? / Which type of device do you use to access London travel information/which type of device do you use most often to access London travel information?

Base: All who have access/use the internet or who use mobile phone/other portable internet device (846) / all who access London travel information online (503)

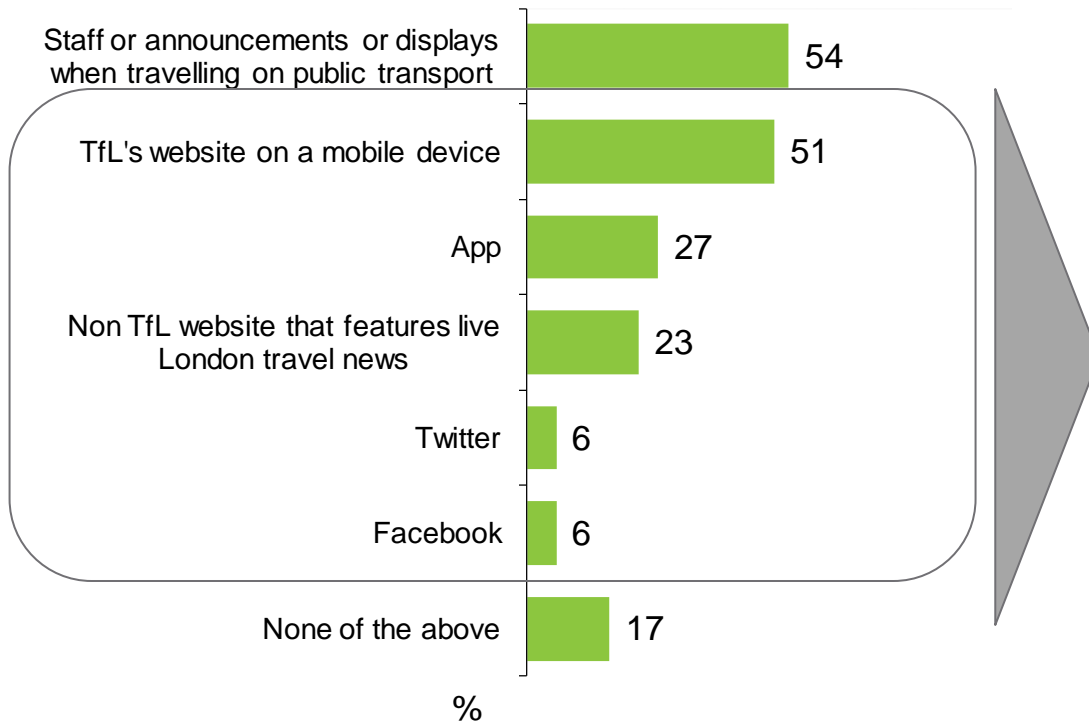




# Location where accessed London travel information amongst online Londoners

Online London travel information is mainly accessed at home

## Source of London travel information



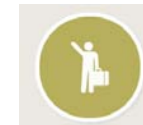
## Where accessed London travel information online



At home 65%



On the move 25%



At work 24%

EMUNEW1/1e: Which sources of information do you use to access London transport information? / Do you access online London travel information at home, at work or on the move?

Base: All who have access/use the internet or who use mobile phone/other portable internet device (846) / All who access London travel information online (363). Please note that the base size on this chart is based on re-contact interviews and therefore does not match the base on slide 32 – see methodology in appendix for further details

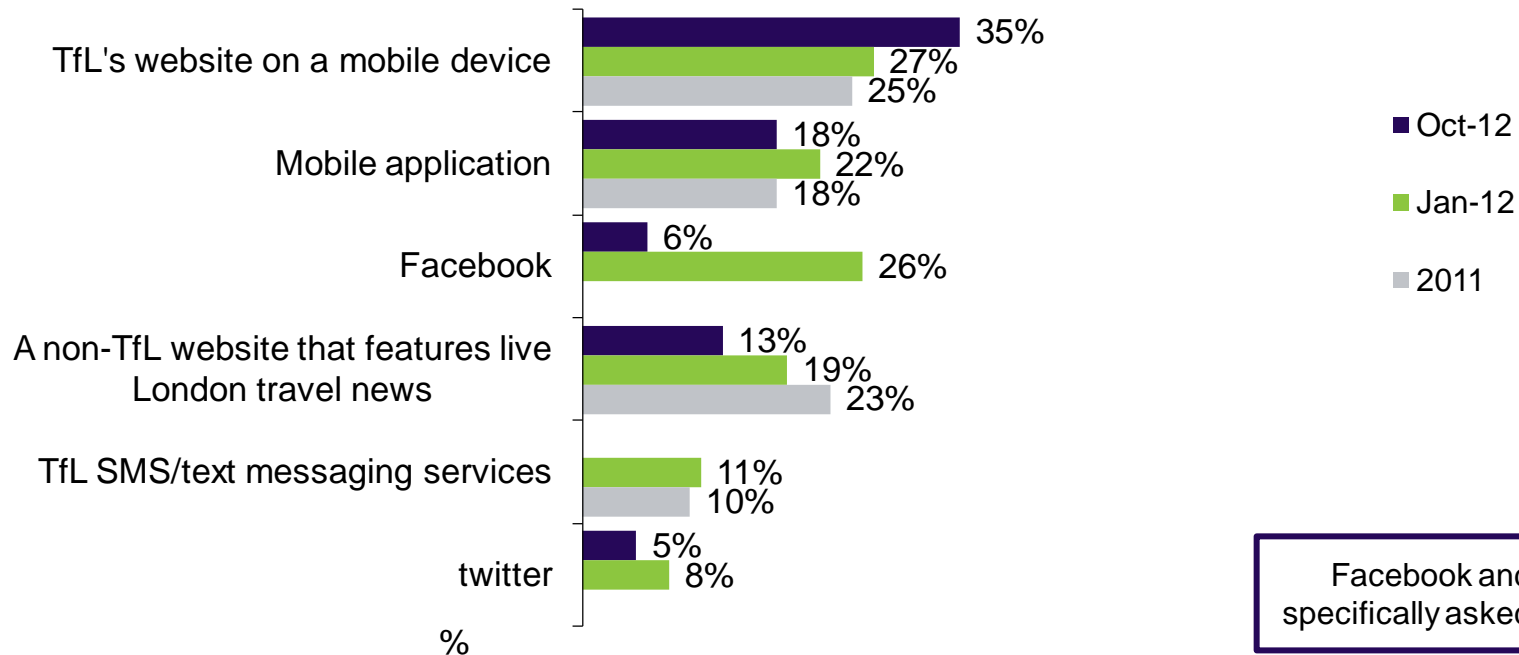


# Use of online sources to find out about problems and delays during journeys

There has been growth in Londoners using TfL's website on a mobile and it is the most commonly mentioned source for such information

The percentage of people claiming to use Facebook as a source of information about problems or delays during journeys has dropped back to a similar level to twitter (6% and 5% respectively)

## 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 (c. 1,000)



# Apps usage

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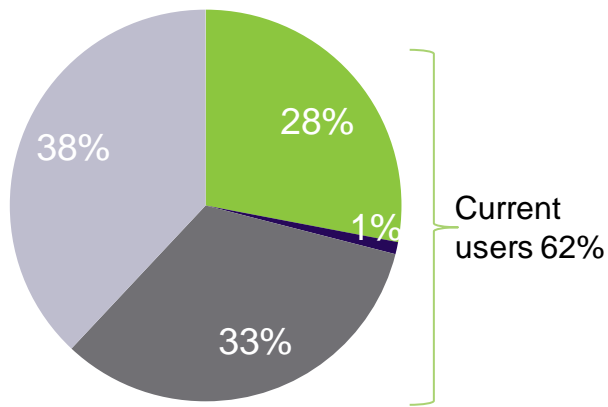


# Apps usage and preference vs websites

Over 6 out of 10 Londoners who have a mobile phone use apps

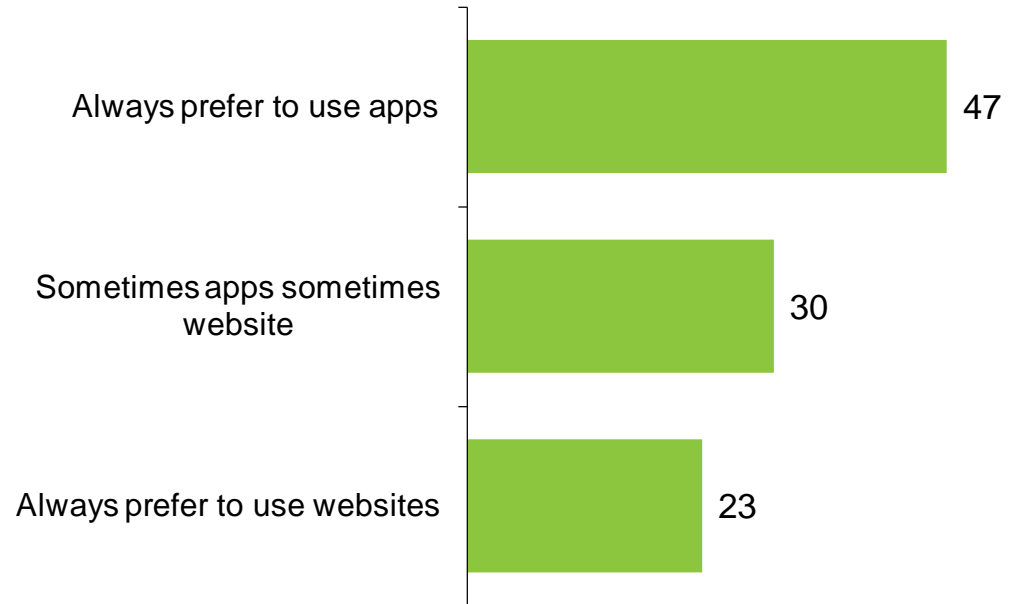
Amongst those that use apps nearly half claim that they always prefer to use apps over websites

Whether used apps



- Yes - free ones
- Yes - paid ones
- Yes - both paid and free
- No

Preference of using website vs apps



APP1/2: Do you use any apps on your mobile device, either free or paid apps? / When you are using your mobile device, do you generally prefer to use apps or go to a website?

Base: All respondents who have a mobile device (838), All who use apps (431)



# Reasons for choosing apps vs websites

Ease and speed of use main reasons of choice of using apps or websites

## Why prefer to always use apps

Easy to use / user friendly	47%
Apps are quicker	33%
Apps are convenient	15%
Designed to work on phones whilst on the move	10%
Apps go straight to information that I want	9%
Looks clearer on my phone screen than websites	7%
Already have app	5%
Other mentions below 4%	21%

## Why prefer to use mixture of apps & websites

Depends on information needed	20%
Depends if I have the app or not	13%
Some services are better on website / better on app	11%
More information on website	9%
Already have app	6%
Apps are quicker	5%
Depends on type /content	4%
I don't have a preference	4%
I like to use both	4%
Looks clearer on my phone screen than websites	4%
Poor functionality of apps	4%
Easy to use / user friendly	4%
Other mentions below 4%	38%

## Why prefer to always use websites

Websites easier to use	19%
Websites are quicker	18%
More / better / detailed information on website	16%
Don't know how to use apps / not familiar with them	13%
Poor functionality of apps	9%
Habit / its what I use the most	8%
Have to sign in / register with apps	7%
Apps take up too much memory on my phone	7%
Websites are more flexible	7%
Information clearer on web	6%
Apps are slow	4%
Only way I know how	4%
Other mentions below 4%	27%

APP3: Why did you say you preferred to always use apps / sometimes use apps, sometimes websites / always prefer to use websites?

Base: All who prefer to always use apps (189), all who prefer to sometimes use apps, sometimes use websites (142), all who always use websites (100)



# Social media usage

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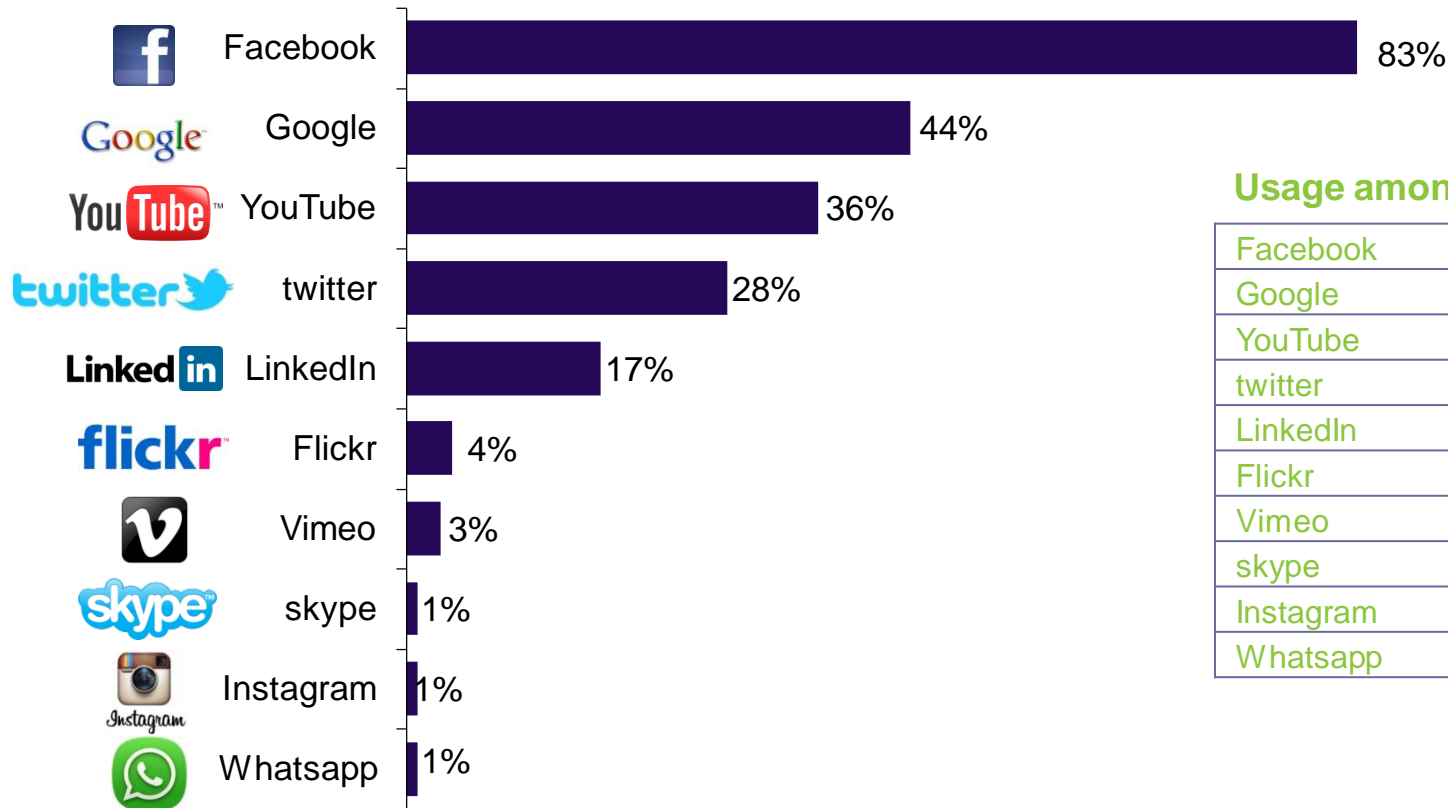
# Social media regularly used

61% of Londoners use social media sites

Amongst Londoners who use social media and networking sites, Facebook is the most popular followed by Google and YouTube

Around half of Londoners claim to use Facebook

## Usage of social media amongst those who use social media sites



## Usage amongst Londoners

Facebook	51%
Google	27%
YouTube	22%
twitter	17%
LinkedIn	10%
Flickr	3%
Vimeo	2%
skype	1%
Instagram	1%
Whatsapp	neg

SM1: Which social media do you regularly use?

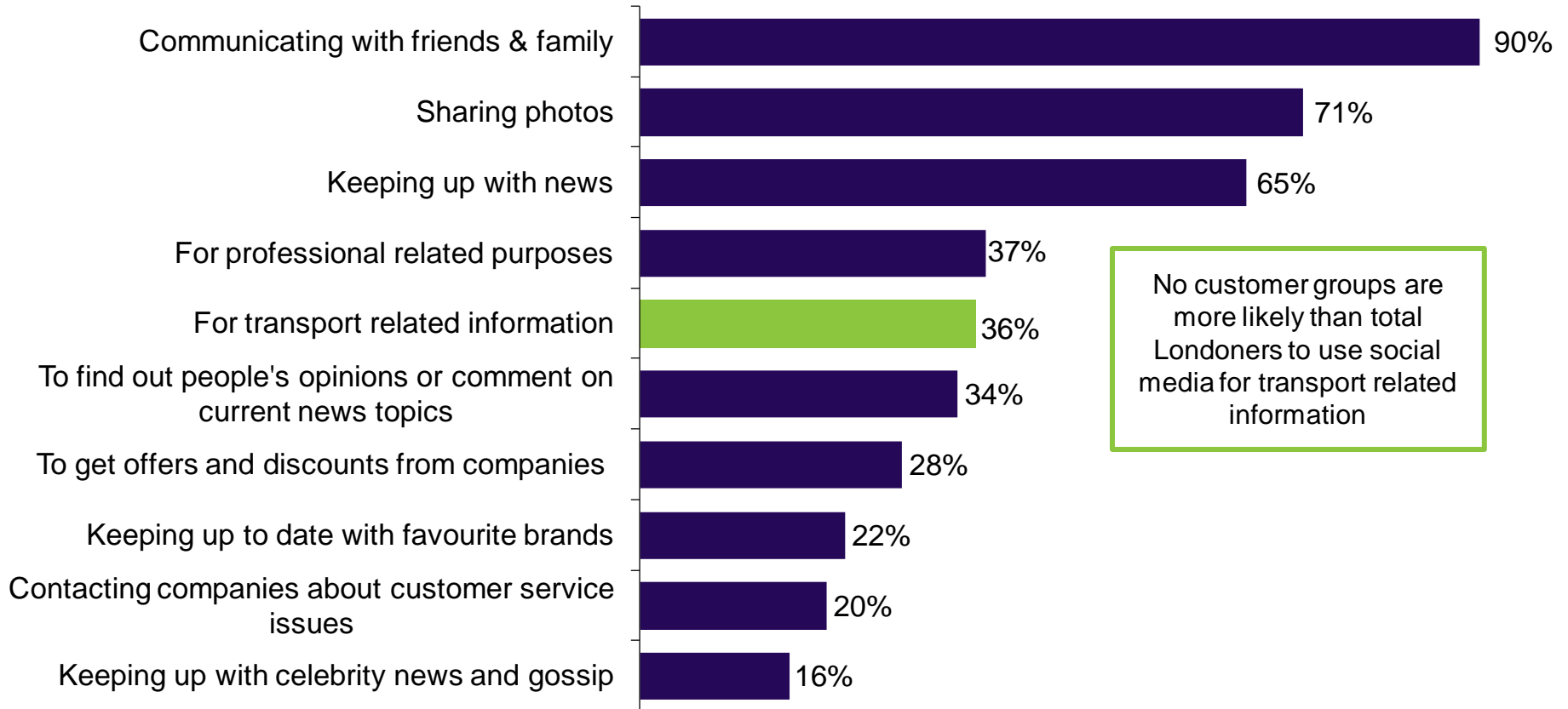
Base All respondents who use social media & networking sites (503)



# Social media activities

Communicating with friends & family is the most common social media activity amongst Londoners who use social media and networking sites

Over a third of Londoners who use social media, use it for transport related information



SM2: What activities do you use social media for?

Base: All respondents who use social media & networking sites (503)

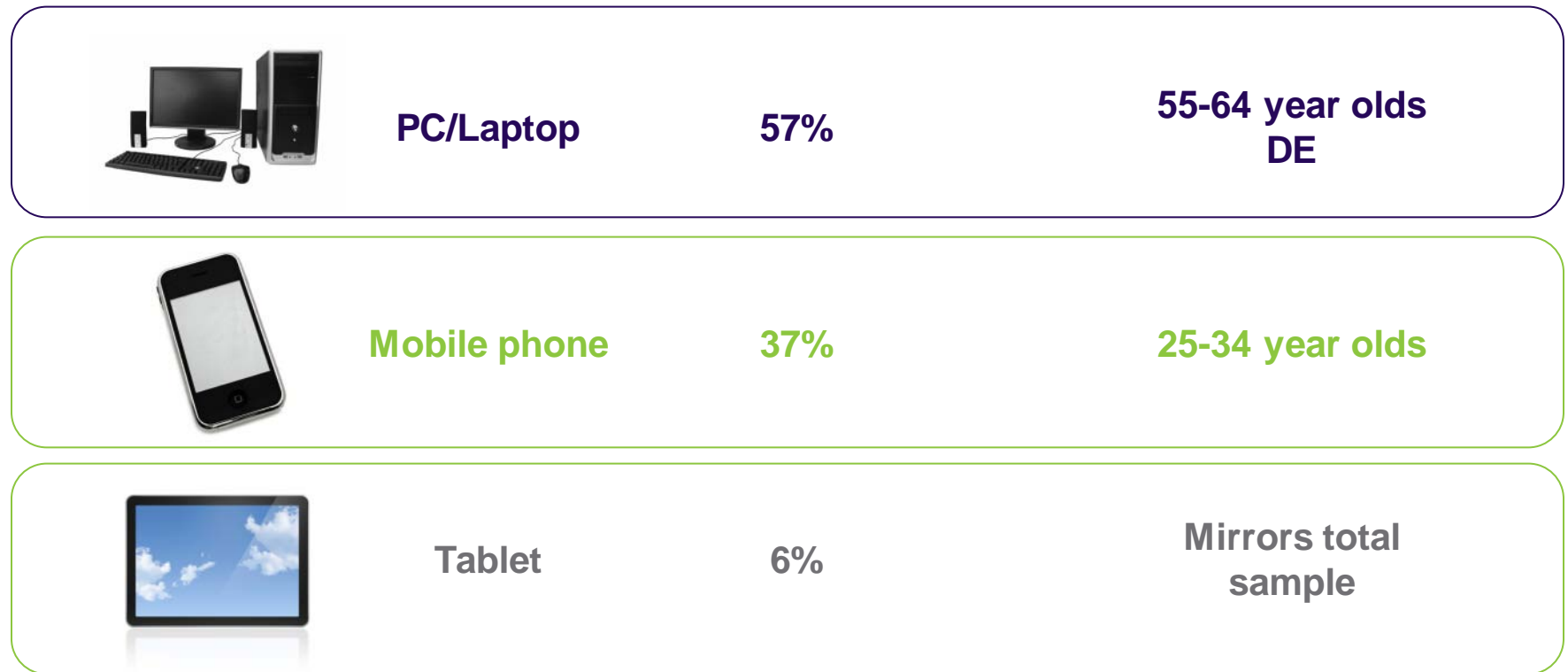


# → Social media device usage

Over half of Londoners who access social media do so using a laptop or PC, with just over a third using a mobile phone

## Device used to access social media

Customer groups that are more likely to use specific devices compared to total base



SM3: Which type of device do you use to access social media?  
Base: All respondents who use social media & networking sites  
excludes don't know (503)



# Appendix

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# Appendix

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## Methodology

- The research comprised 1,027 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 1st and 21st October 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
- A survey scripting error occurred which meant that respondents were not asked EMU1e: And do you access online London travel information at home, at work or on the move? Once this was identified, as many as possible of the respondents who should have been asked this question were re-contacted, and their answers were used in the analysis (on slide 33). Although the sample size was smaller than it would have been if the question was asked on the original survey (363 vs 503) the achieved sample matches the demographic profile of the intended sample, and thus we are confident that the data is reliable