Mobile phones on the Underground

09088

March 2010

Research conducted by Synovate

Contents

Research overview

Context

- In common with the general population, most LU users own and/or use a mobile phone or mobile device.

- However, it is not currently possible to use mobile phones on a significant proportion of the Underground system.

- Research in 2007 showed that more people supported than opposed the potential ability to use mobiles across the system. However, only just over half (54%) supported its introduction, and response was somewhat polarised.

- Opinion may have now shifted further towards mobile phone use:
  - increase in the ownership and use of smartphones;
  - increase in use of mobile data and internet services;
  - increasing prevalence and 'normalisation' of mobile phone use in public and on other transport modes;
  - reduction in salience of perceived security risks (terrorism).

Approach

- Combined qualitative and quantitative approach.

- Six focus group discussions with regular LU users who own/use a mobile phone and don't reject the idea of being able to use mobile communications on the Underground.

- Telephone interviews among a representative sample of 1,000 London residents aged 16+, including 725 LU users who own/use a mobile phone or other device.

- Face to face interviews among a representative sample of 819 LU users who own and/or use a mobile phone or other mobile device.

- Fieldwork in February / March 2010.

Headlines

- People are generally accepting of the current situation of not being able to use their mobile.

- Use of mobiles on LU is more supported than opposed. Support among London residents has increased since 2007. However, it is not a strong requirement.

- If mobiles are able to be used on LU, most feel having reception would quickly become accepted and normalised.

- If mobiles are able to be used on LU, the service should be as normal to use as possible, and not costly to LU.

Key findings:

People are generally accepting of the current situation of not being able to use their mobile.

The general 'default' is that the tube is 'mobile free'. People can be quite protective of the current situation.

- Time on the Tube is 'me' time.
    - Reading, music, thinking, sleeping or even just staring at the floor
    - A place to switch off from the outside world.

- People go into their shell, retreat inward.
    - Lack of personal space: a noisy, crowded environment
    - 'Trapped' in an enclosed space with people they don't know.

- People are used to not having mobile reception when travelling on LU.
    - It's a part of life
    - Some people enjoy being forced to 'switch off' and unable to be contacted / make contact: protective of their 'me' time.
    - Some people with smartphones draft emails while on the train, which sit in their outbox until they do receive a signal.
    - People may head back outside if absolutely need to make a call.

Despite perceptions and reservations, many have used - or at least wanted to use - their mobile while on LU.

London residents

- ■ Used or wanted to use
- ■ Never used or wanted to
- ■ No opportunity to use

Don't use LU or don't have a mobile

25%

13%

62%
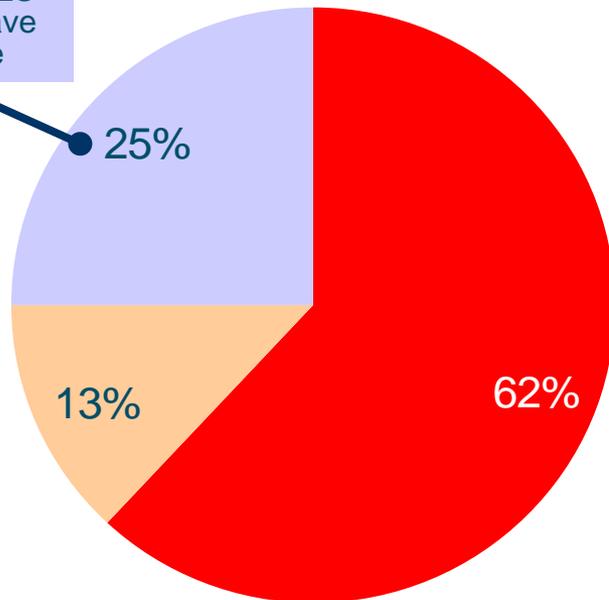
LU users

- ■ Used or wanted to use
- ■ Never used or wanted to
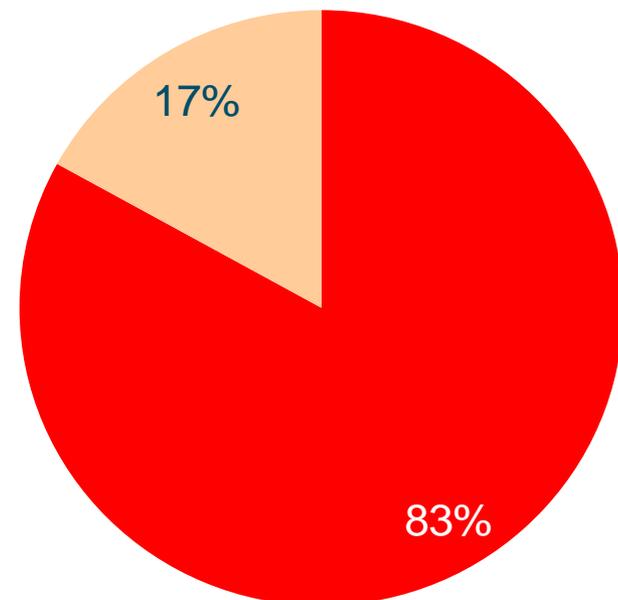
17%

83%

Many people already use mobiles in LU stations and on LU trains.

London residents **LU users**

Used mobile on LU
- 55%
- 77%

Used mobile in LU stations
- 45%
- 68%

Used mobile on LU trains
- 47%
- 67%

The majority of those who currently use mobiles on LU do so at least once a week.

■ Every day   ■ More than once a week   ■ Once a week   ■ Once a month   ■ Less often   ■ Don't know

Used mobile in LU stations

37% ↑ | 29% | 16% | 8% | 8%

Users tend to be more frequent LU users, and more frequent and 'sophisticated' mobile phone / device users.

Used mobile on LU trains

29% | 32% | 17% | 12% | 9%

↑ = significantly higher at 95% confidence level
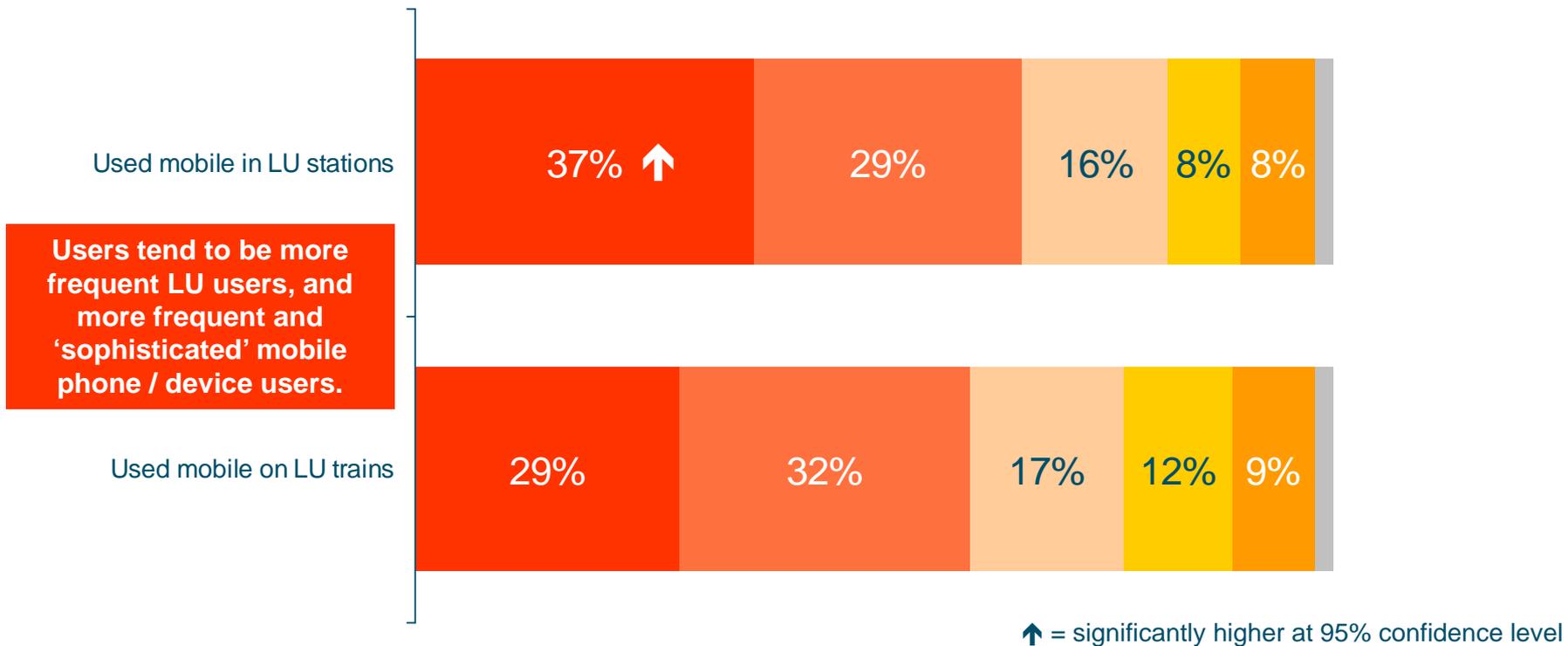
Source: LU users Q13b; Q15b / Base: LU users who have used a mobile on LU stations (n=531); LU users who have used a mobile on LU trains (n=531)

Many people have been in situations where they have wanted to use mobiles on LU, but they could not.

■ London residents **■ LU users**

Wanted to use mobile on LU	53% / 73%
Wanted to use mobile in LU stations	50% / 66%
Wanted to use mobile on LU trains	49% / 66%

More than half of those who have wanted to use their mobile on LU have wanted to do so within the last week.

Legend: ■ Yesterday   ■ In the last week   ■ In the last month   ■ In the last year   ■ Don't know

Wanted to use mobile in LU station: 37% ↑ | 32% | 23% | 7%

Those who have wanted to use mobiles tend to also be those who have used mobiles on LU (92% have also used).

Wanted to use mobile on LU train: 33% | 29% | 26% | 9%

↑ = significantly higher at 95% confidence level

Key findings:

Use of mobiles on LU is more supported than opposed, but is not a strong requirement.

Introducing a mobile signal means 'everyday life' would stretch down into the world of LU. This carries positives and negatives.

Positives

- You can do more.
    - More options for 'me' time: internet, texts, emails, …voice calls?
    - More productive use of 'me' time e.g. clearing their inbox.
    - Connected with the outside world: in touch; social life; security.
    - Notify people if something unexpected happens, e.g. delays.
- You can carry on 'as normal': a logical extension of the modern world (or at least, the modern world asserting itself)

VS.

Negatives

- Inconsiderate phone users a major annoyance.
    - Not necessarily inevitable.
    - Most prepared to tolerate (c.f. people having a loud conversation?).
- No longer out of reach / uncontactable.
- Security concerns, e.g. reluctant to use device for fear of theft.

Overall, more people support the ability to use mobiles on LU than oppose it.
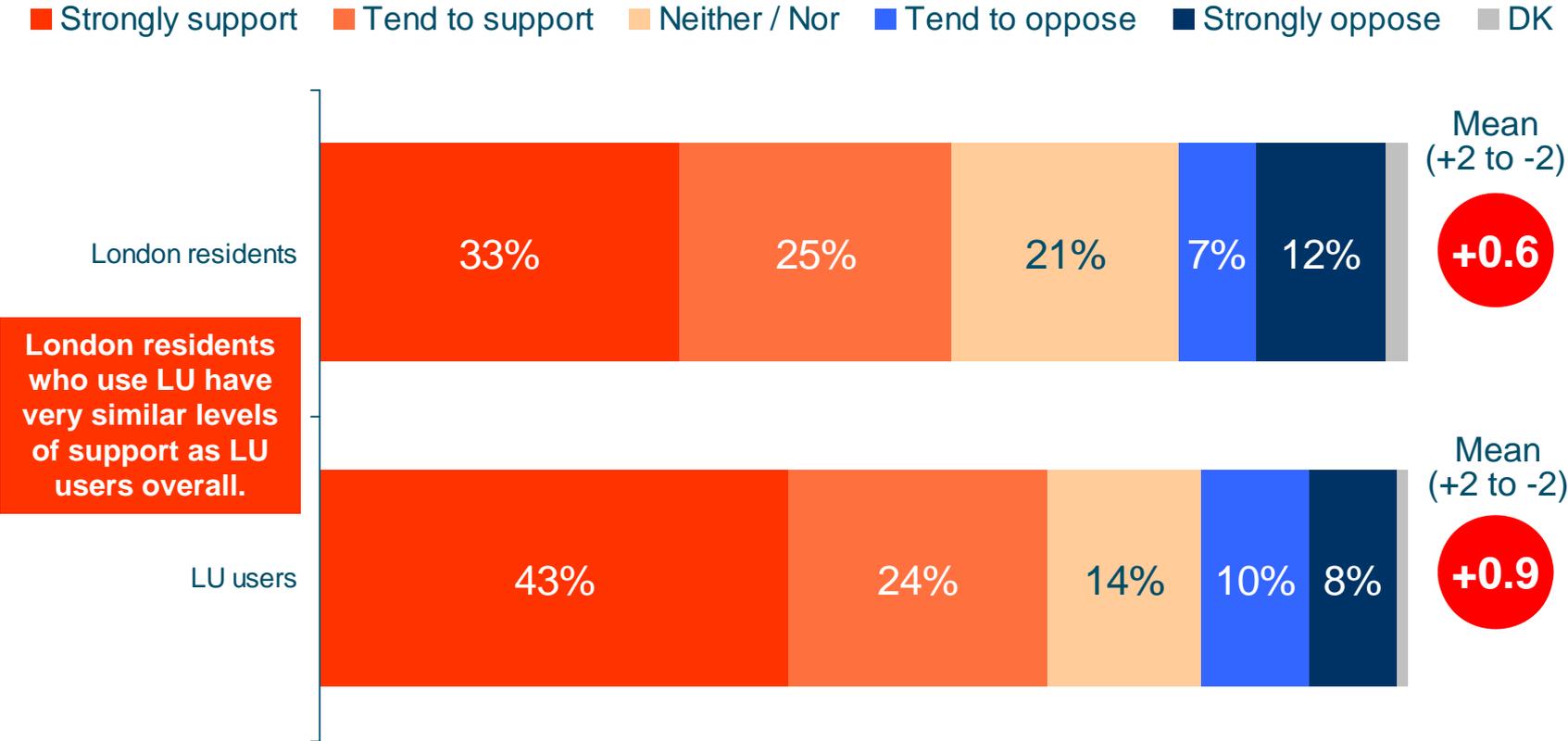
■ Strongly support   ■ Tend to support   ■ Neither / Nor   ■ Tend to oppose   ■ Strongly oppose   ■ DK

London residents

| 33% | 25% | 21% | 7% | 12% |

Mean (+2 to -2)

+0.6

London residents who use LU have very similar levels of support as LU users overall.

LU users

| 43% | 24% | 14% | 10% | 8% |

Mean (+2 to -2)

+0.9

Among London residents, support has increased significantly and opposition decreased significantly since 2007.

Legend: ■ Strongly support ■ Tend to support ■ Neither / Nor ■ Tend to oppose ■ Strongly oppose ■ DK

London residents (Mar 2010): 33% ↑ 25% 21% 7% 12%

London residents (Feb 2007): 32% 22% 12% 11% ↑ 19%
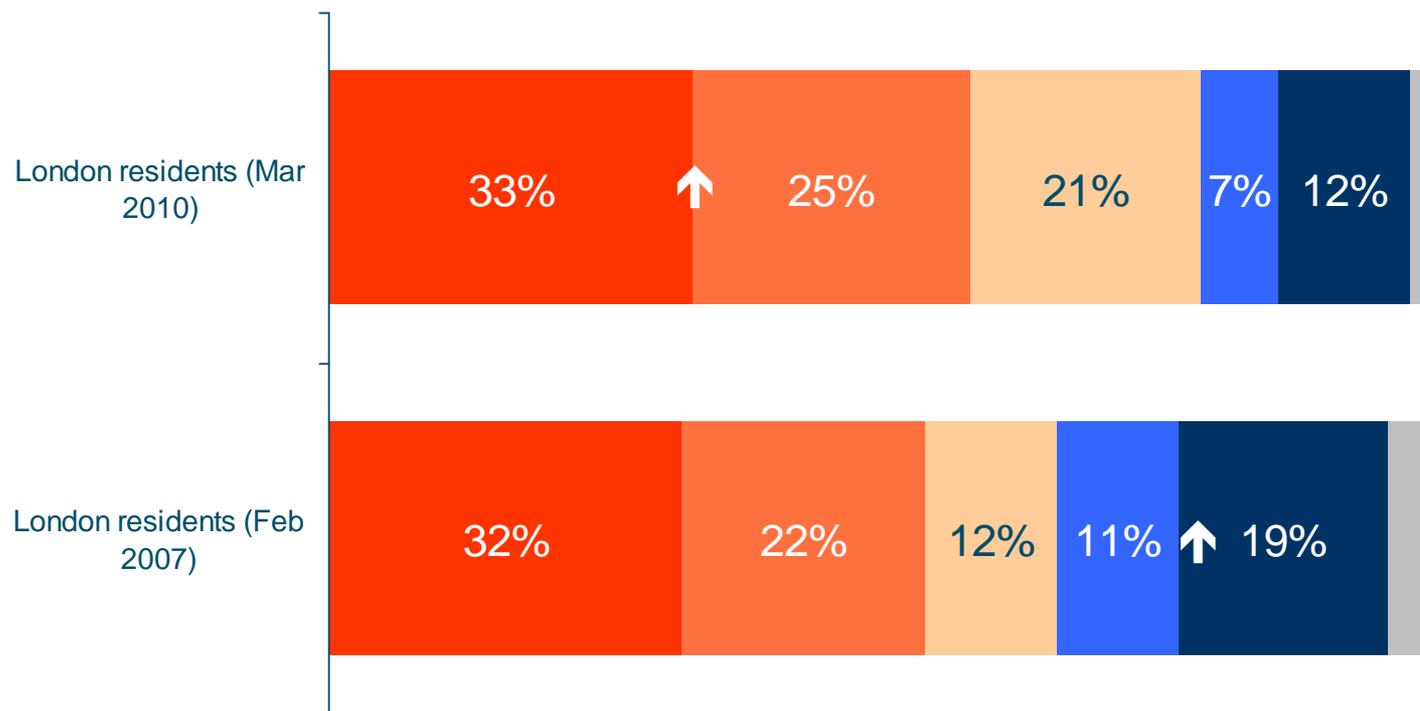
↑ = significantly higher at 95% confidence level

LU users who support mobiles on LU tend to be younger, and more heavy / 'sophisticated' users of their mobiles.

LU users who support the use of mobiles on LU (68%)

More likely to be younger (ages 16-34) (70%)
Less likely to be white ethnicity (66%).

More likely to own more than one mobile device, and more likely to own a 'smartphone' (50%).
More frequent users of mobiles for voice calls (8.8/day) and SMS (10.3/day).
More likely to use their mobile for mobile internet (44%) and emails (41%).

More likely to use their mobile only for personal use (72%), and less likely to use for personal and business uses (26%).

LU users who oppose the use of mobiles on LU (18%)

Less likely to be younger (ages 16-34) (45%), and more likely to be older (ages 55+) (18%).
More likely to be white ethnicity (81%).

More likely to only own a 'standard' mobile phone, and less likely to own a 'smartphone' (36%).
Less frequent users of mobiles for voice calls (7.6/day) and SMS (7.4/day).
Less likely to use their mobile for mobile internet (27%) and emails (29%).

Less likely to use their mobile only for personal use (62%), and more likely to use for personal and business uses (35%).

No significant differences by:
gender; working status; where live; frequency of LU use.

Support is principally for reasons of convenience. Opposition is for reasons of noise and disturbance.

Reasons for support (68%)

In case of accident / emergency / for safety	26%
To say if stuck / late / delayed	14%
Would be good to be able to use phone	11%
Want to use phone anywhere / everywhere	11%
Useful	9%
Convenient / handy	9%
Able to use SMS / email / internet	6%
In case of important / urgent calls	6%
To keep in contact	6%
To make calls to friends / family	6%
Easier to contact people when travelling	5%
To use when necessary / when need to	4%
Faster to communicate / more efficient	4%
Makes life easier	4%

Reasons for opposition (18%)

Don't want to hear other people on phone	35%
Prefer peace & quiet / quiet journey	24%
Will make travelling noisier / too noisy	22%
Irritating / annoying / disturbing / distracting	21%
Security reasons / threat of attack on LU	9%
Too crowded	8%
Tube only place can get away from mobiles	6%
Hate it / a nightmare / unbearable	5%
Invasion of privacy / intrusive	5%
Cost / waste of money / better spent elsewhere	4%
Negative impacts on other passengers	4%
Fine as it is	3%

Reasons for neither support nor opposition (21%)

Any positive comment	35%	Any negative comment	35%
In case of accident / emergency / for safety	13%	Don't want to hear other people on phone	14%
To say if stuck / late / delayed	7%	Irritating / annoying / disturbing / distracting	12%
No strong feelings either way	28%	Nothing	11%

Not having reception is accepted as part of everyday life. Most don't have a strong desire for - or against - mobiles on LU.
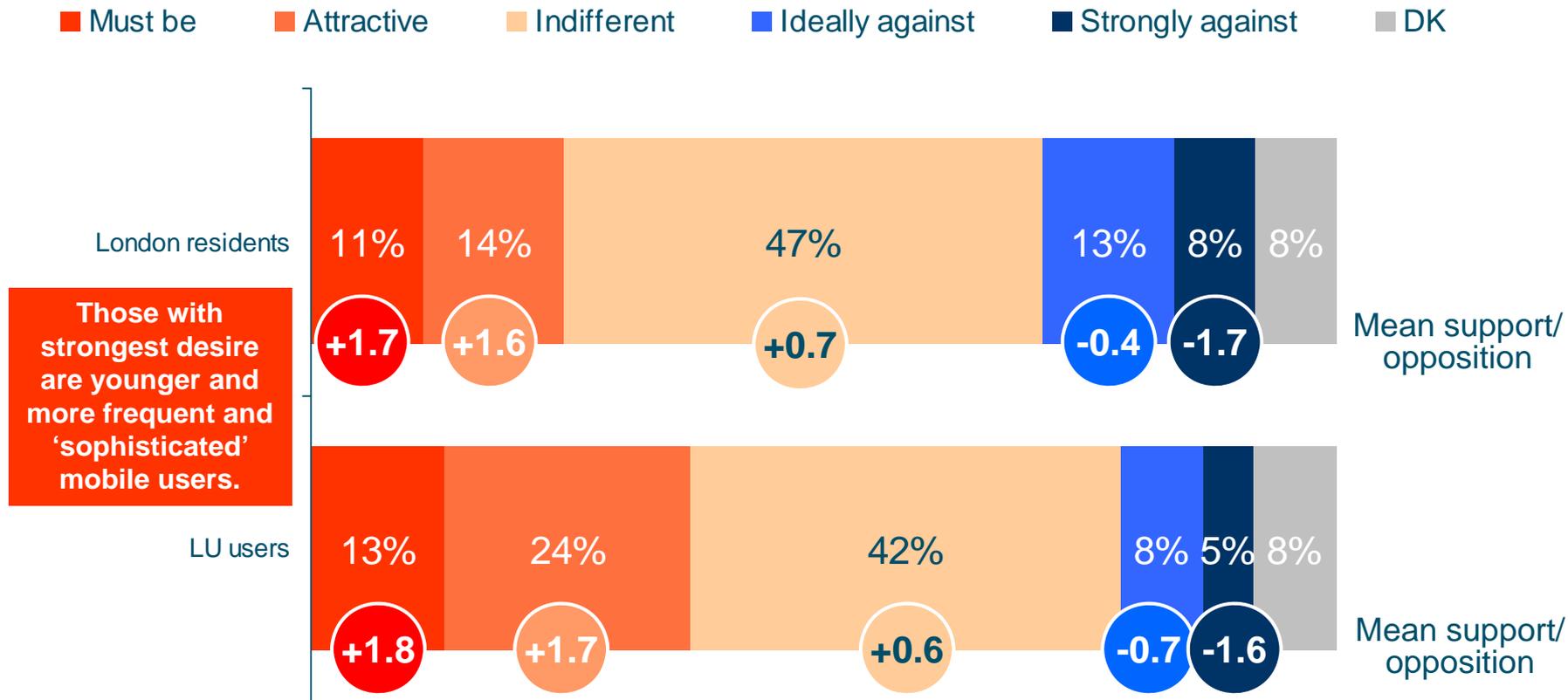
Legend: ■ Must be ■ Attractive ■ Indifferent ■ Ideally against ■ Strongly against ■ DK

London residents
- 11% (+1.7)
- 14% (+1.6)
- 47% (+0.7)
- 13% (-0.4)
- 8% (-1.7)
- 8%

Mean support/opposition

Those with strongest desire are younger and more frequent and 'sophisticated' mobile users.

LU users
- 13% (+1.8)
- 24% (+1.7)
- 42% (+0.6)
- 8% (-0.7)
- 5% (-1.6)
- 8%

Mean support/opposition

Key findings:

If mobiles are able to be used on LU, most feel having reception would quickly become accepted and normalised.

Likely use of mobiles on LU is greater than support: there is recognition among customers that 'if they can, they will'.
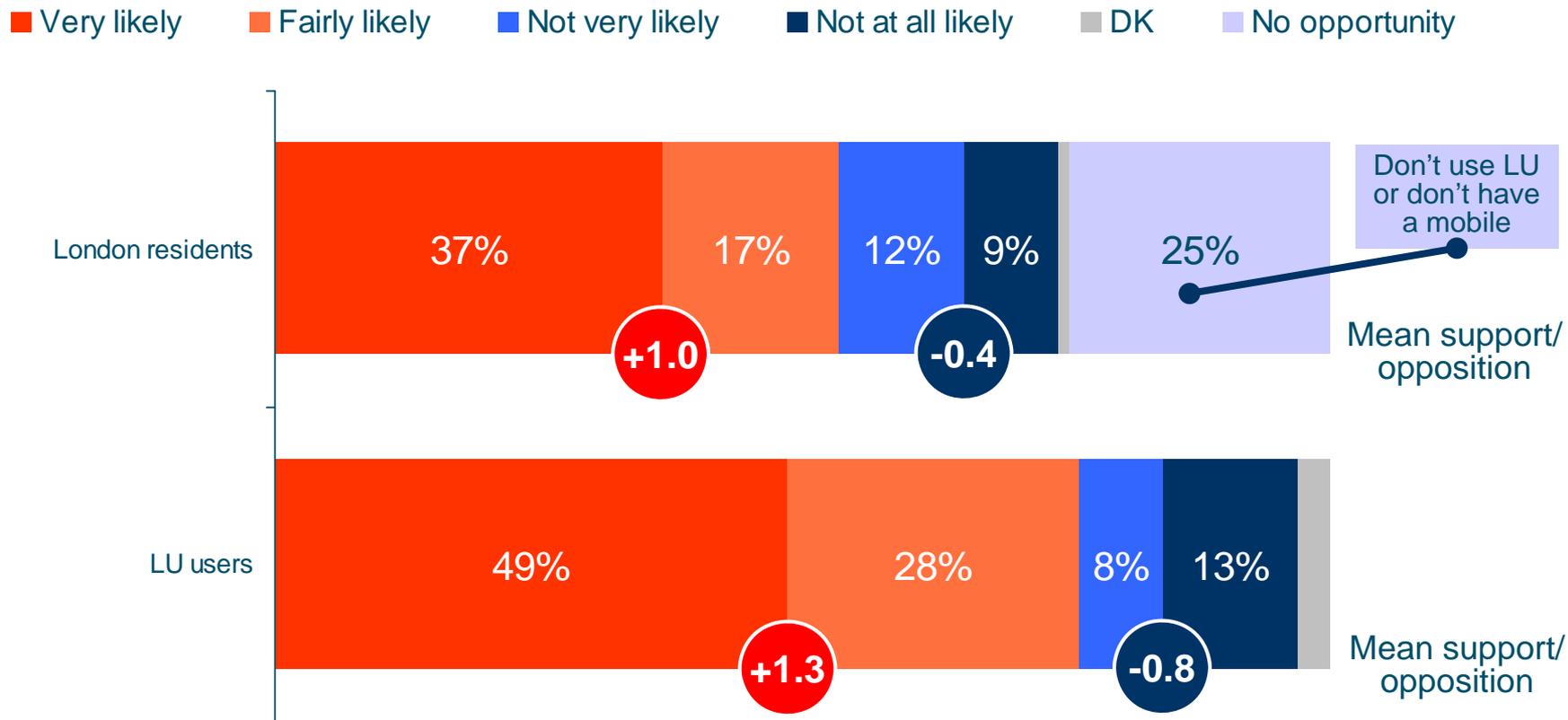
Legend: ■ Very likely ■ Fairly likely ■ Not very likely ■ Not at all likely ■ DK ■ No opportunity

London residents: 37% | 17% | 12% | 9% | 25%
- +1.0
- -0.4
- Don't use LU or don't have a mobile
- Mean support/ opposition

LU users: 49% | 28% | 8% | 13%
- +1.3
- -0.8
- Mean support/ opposition

A notable minority of those who oppose mobiles on LU say they are likely to use mobiles on LU if they could.

Legend: ■ Very likely ■ Fairly likely ■ Not very likely ■ Not at all likely ■ DK ■ No opportunity

	Very likely	Fairly likely	Not very likely	Not at all likely	DK	No opportunity
London residents: support	52%	17% ↑	6%	3		21%
London residents: oppose	17%	13%	17% ↑	23%		27%
LU users: support	68%	28% ↑	2	1		
LU users: oppose	5%	21%	19% ↑	53%		
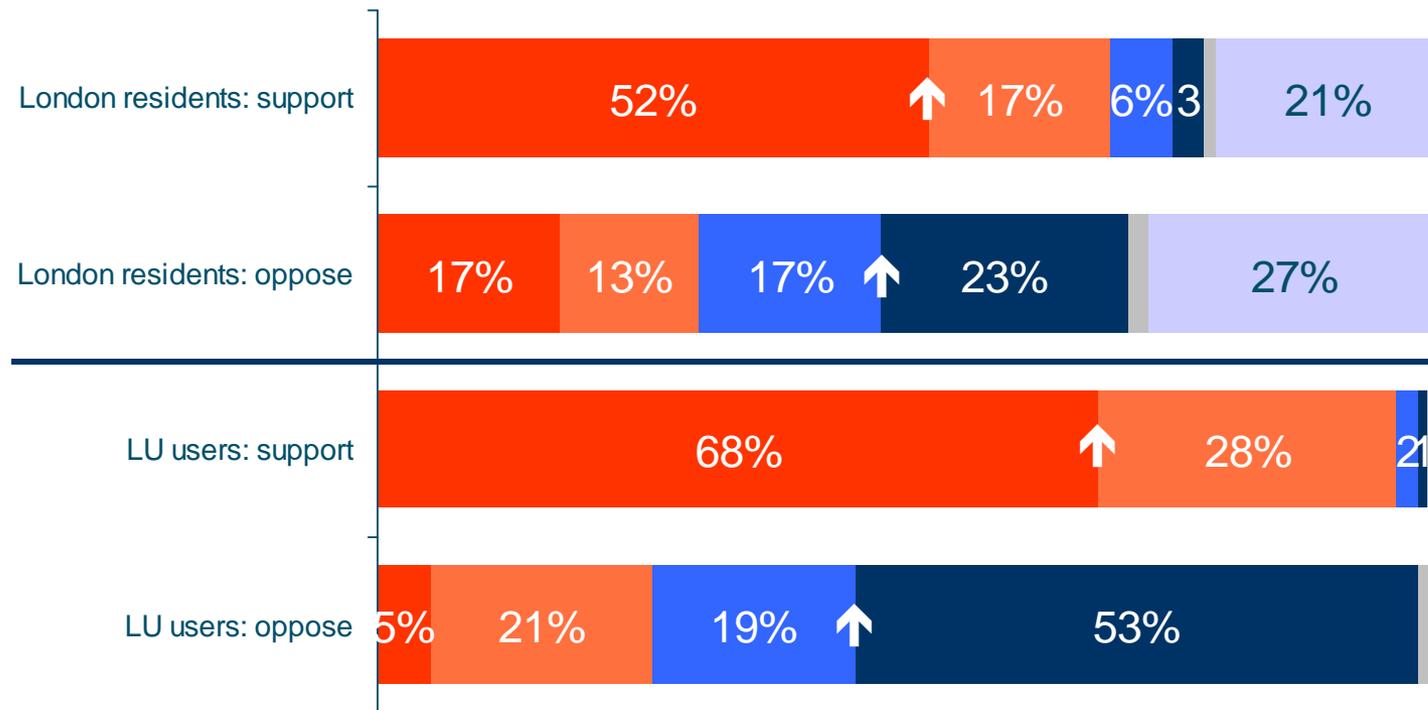
↑ = significantly higher at 95% confidence level

Those who say they are unlikely to use mobiles on LU are much less likely to be users of mobile internet / email services.

■ LU users likely to use mobiles on LU   ■ LU users not likely to use mobiles on LU

Voice calls
- 98%
- 99%

Text messaging / SMS
- 96%
- 93%

Mobile internet
- 43% ⬆
- 22%

Email
- 41% ⬆
- 24%

Other uses
- 41% ⬆
- 28%

⬆ = significantly higher at 95% confidence level
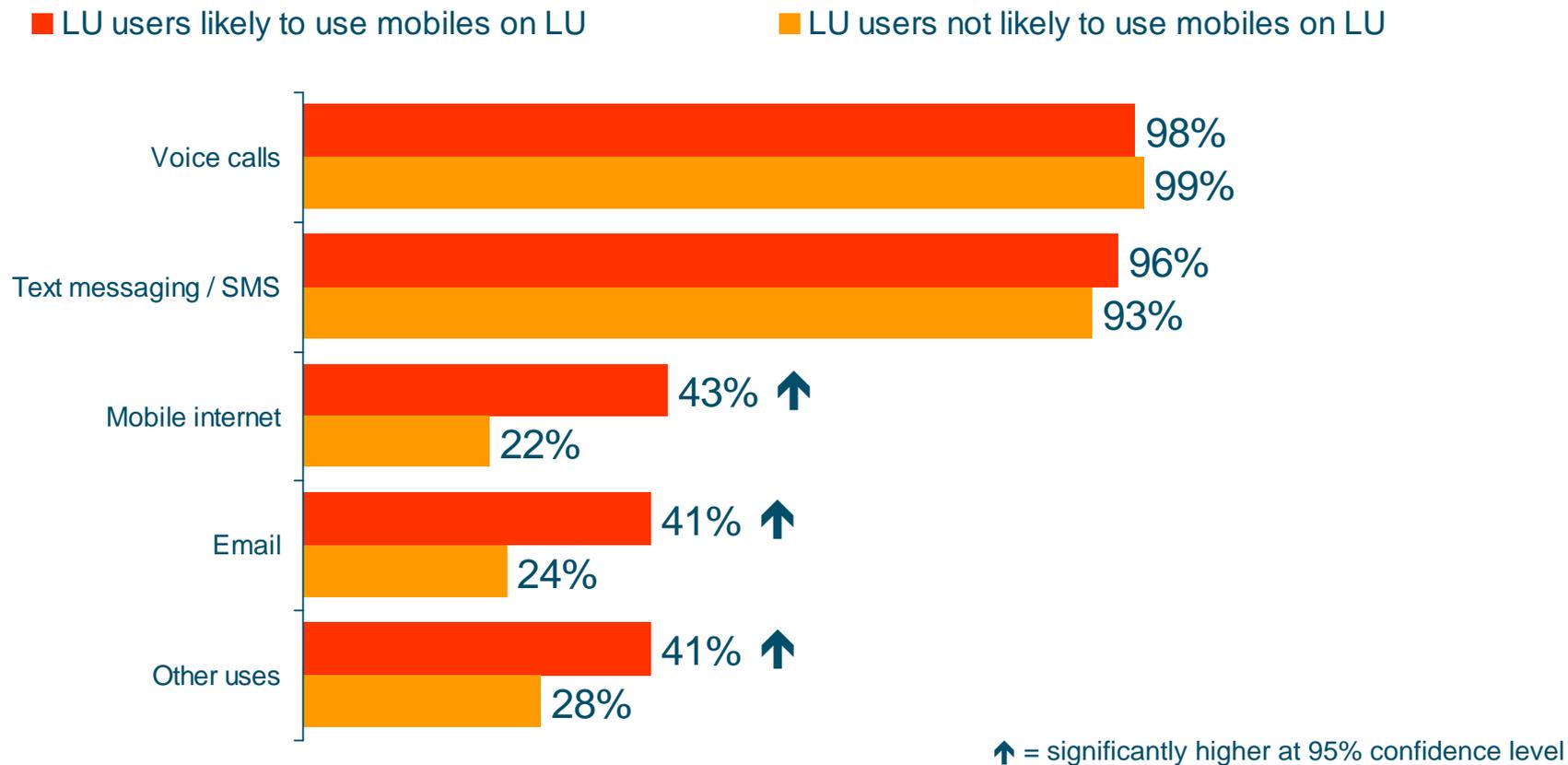
Source: LU users Q7 / Base: LU users who would be likely to use their mobile on LU if they could (n=605); LU users who would be unlikely to use their mobile on LU if they could (n=193)

Qualitatively, most feel that they are likely to make more use of 'data' services on LU, rather than voice services.

- For the majority, data appeals most.
- But then it would seem weird to not also have voice services.
- People using LU for work purposes tend to prefer text or email:
  - most convenient way to get in touch with colleagues;
  - No need (or desire) for prolonged conversations.

- Where travelling for leisure, data provides a wider range of entertainment / distraction options

- Most popular services:
  - internet;
  - text;
  - music;
  - email;
  - voice.

Slightly counter to qualitative learnings, most claim they would make calls and use SMS, and be less likely to use 'mobile internet'.

■ How would use mobiles on LU   ■ How use mobiles generally

Voice calls
- 93%
- 98%

Text messaging / SMS
- 92%
- 96%

Mobile internet
- 33%
- 43% ⬆

Email
- 32%
- 41% ⬆

Other uses
- 21%
- 41% ⬆

⬆ = significantly higher at 95% confidence level
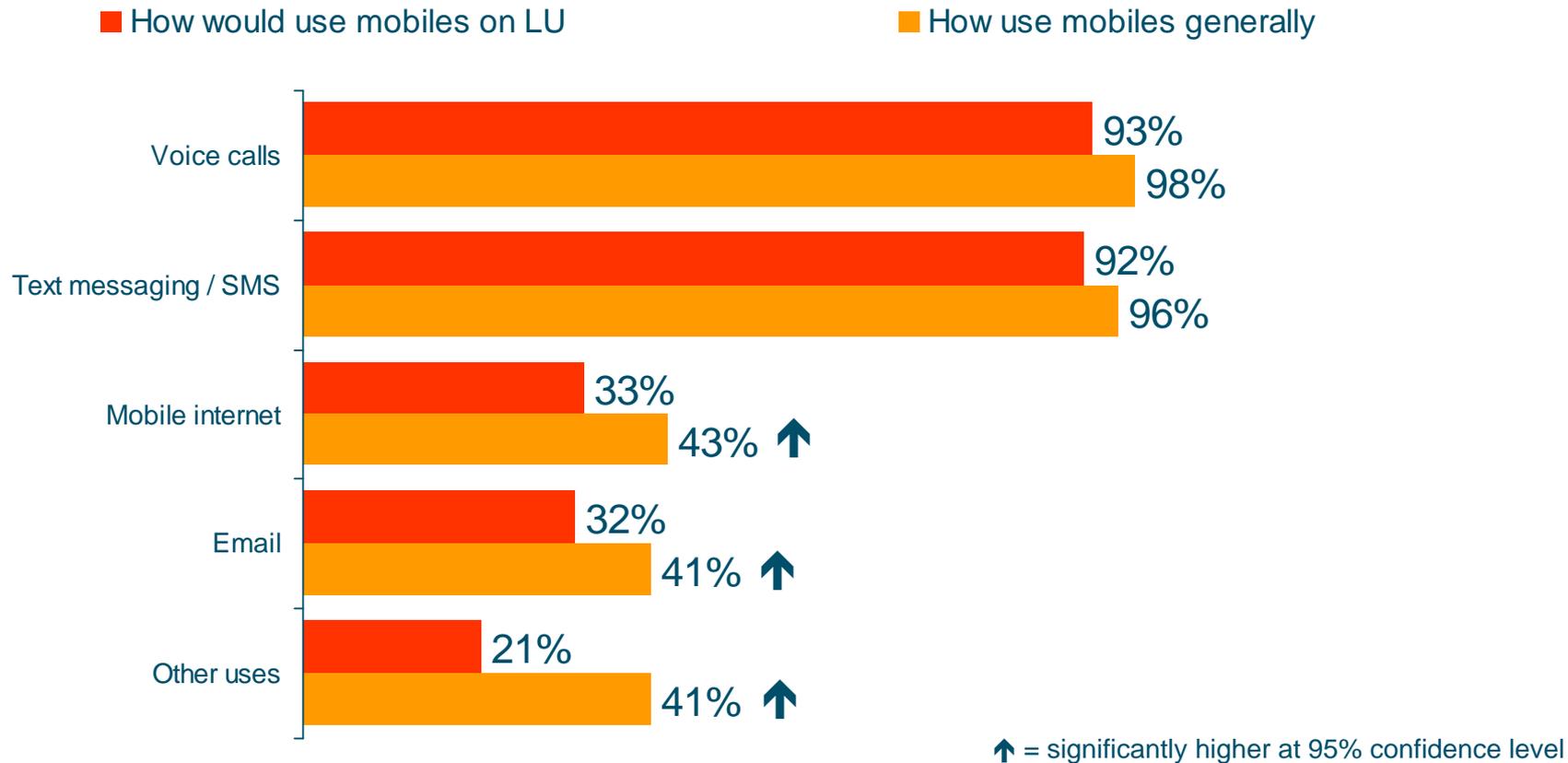
Source: LU users Q22; Q7 / Base: LU users who would be likely to use their mobile on LU if they could (n=605)

When different potential situations for mobile use are suggested, (even) more LU users say they might use their mobiles on LU.

■ LU users

Any potential use	94%
If delays, calling to say you might be late	87%
If delays, texting to say you might be late	89%
Receiving SMS from TfL with real time delays information	57%
If delays, accessing TfL website to re-plan your journey	42%
Accessing TfL website for real time information on services	39%
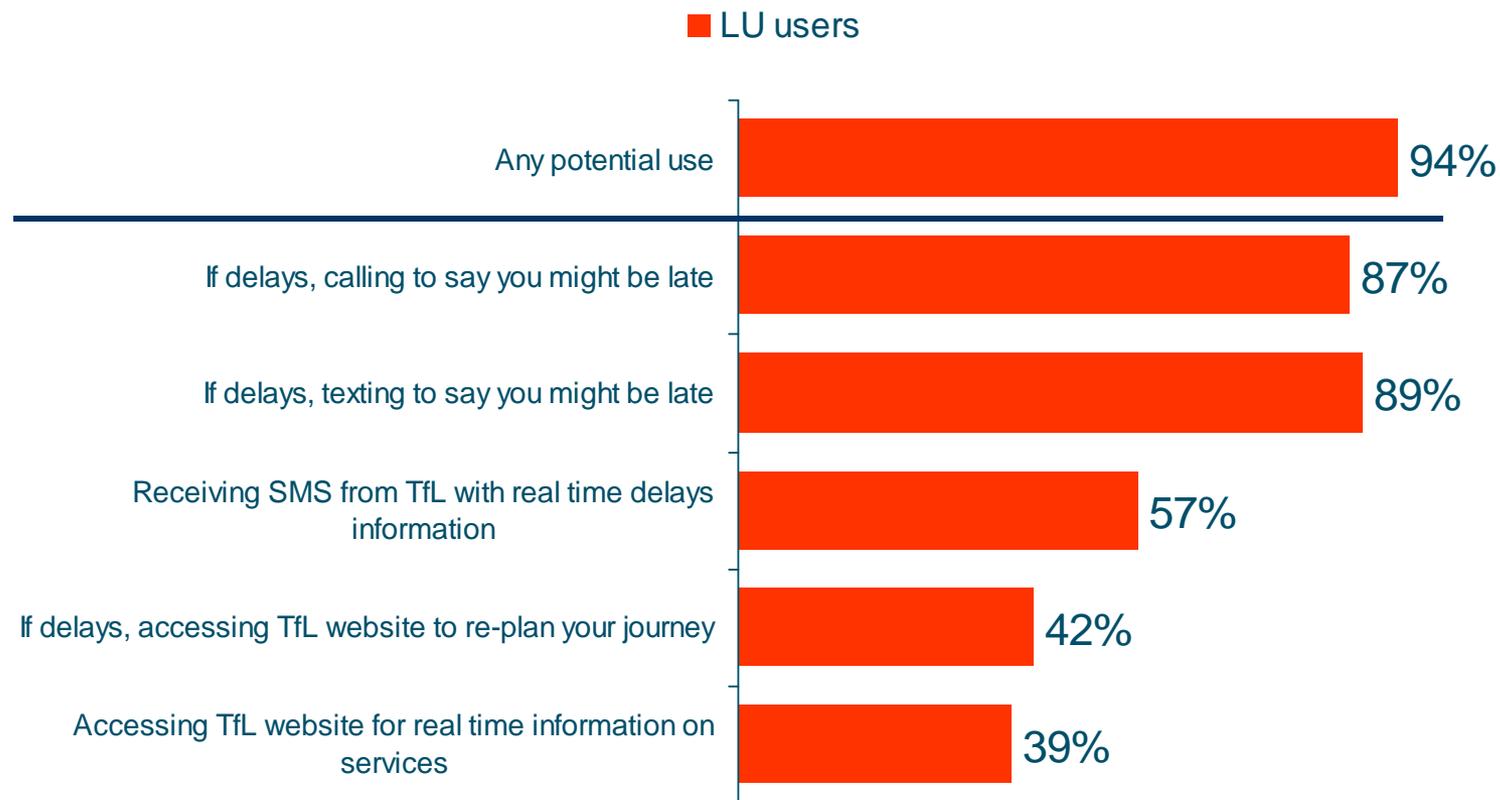
Source: LU users Q24a-g / Base: LU users who own/use a mobile (n=819)

Even most of those who say they are not likely to use mobiles on LU say they might use them in certain (prompted) situations.

■ LU users likely to use mobiles on LU   ■ LU users not likely to use mobiles on LU

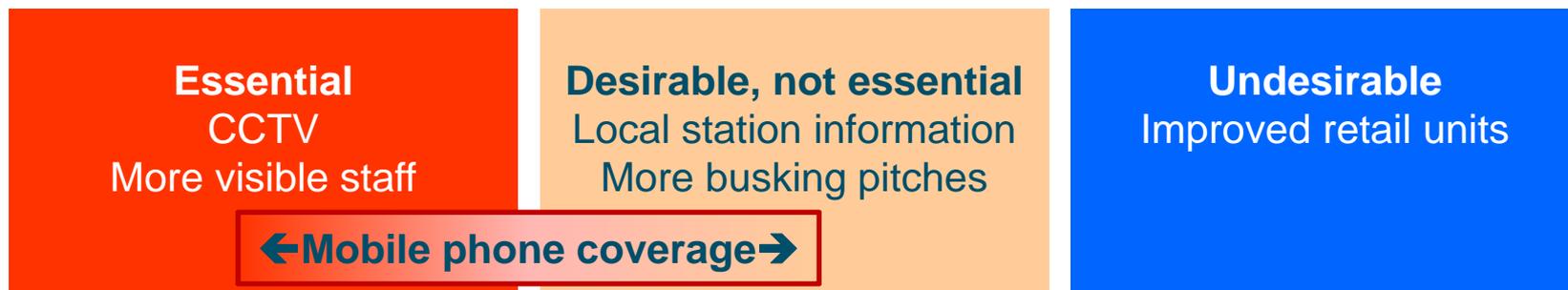|		
Any potential use	99% ↑	80%
If delays, calling to say you might be late	95% ↑	62%
If delays, texting to say you might be late	94% ↑	73%
Receiving SMS from TfL with real time delays information	65% ↑	33%
If delays, accessing TfL website to re-plan your journey	52% ↑	10%
Accessing TfL website for real time information on services	48% ↑	9%

↑ = significantly higher at 95% confidence level

Source: LU users Q24a-g / Base: LU users who would be likely to use their mobile on LU if they could (n=605); LU users who would be unlikely to use their mobile on LU if they could (n=193)

Key findings:

If mobiles are able to be used on LU, the service should be as normal to use as possible, and not costly to LU.

Introducing a mobile signal is not seen as something directly to do with LU.

- **Significant investment by LU would be questioned.**
  - People associate providing mobile reception with the mobile phone companies: it is in their interest, they ultimately benefit.
  - Alternatively, many think it might be financed through private organisations (e.g. big businesses would benefit from employees being able to keep in touch / increased productivity).

- **Mobile signal is desirable, not essential.**
  - Most would rather continue to live without it, than pay extra for it.
  - Appealing, but not as appealing as investment in core services.
  - Less important that tangible impacts on safety & security.

Essential CCTV More visible staff	**Desirable, not essential** Local station information More busking pitches	**Undesirable** Improved retail units
←**Mobile phone coverage**→		

Customers struggle to see what LU could / might do with the introduction of the new technology

- **Real time information**
  - Most people expect LU to take advantage of the mobile network but are unsure exactly how.

  - Do not see how 'pushed out' information could work in practice:
    - LU can't know which train you are on?
    - Everyone in a carriage getting a text from LU at the same time?

  - Don't anticipate that RTI would diminish the need for current information sources, particularly announcements.

- However, 55% of LU users with a smartphone* say they would be more likely to access the TfL website using their device, if they could use their mobile on LU.

Source: London residents MOLU9 / Base: London residents who are LU users and own a 'smartphone' (n=249)

Customers accept installation may need to be in stages. Full system access for mobiles is most desirable.

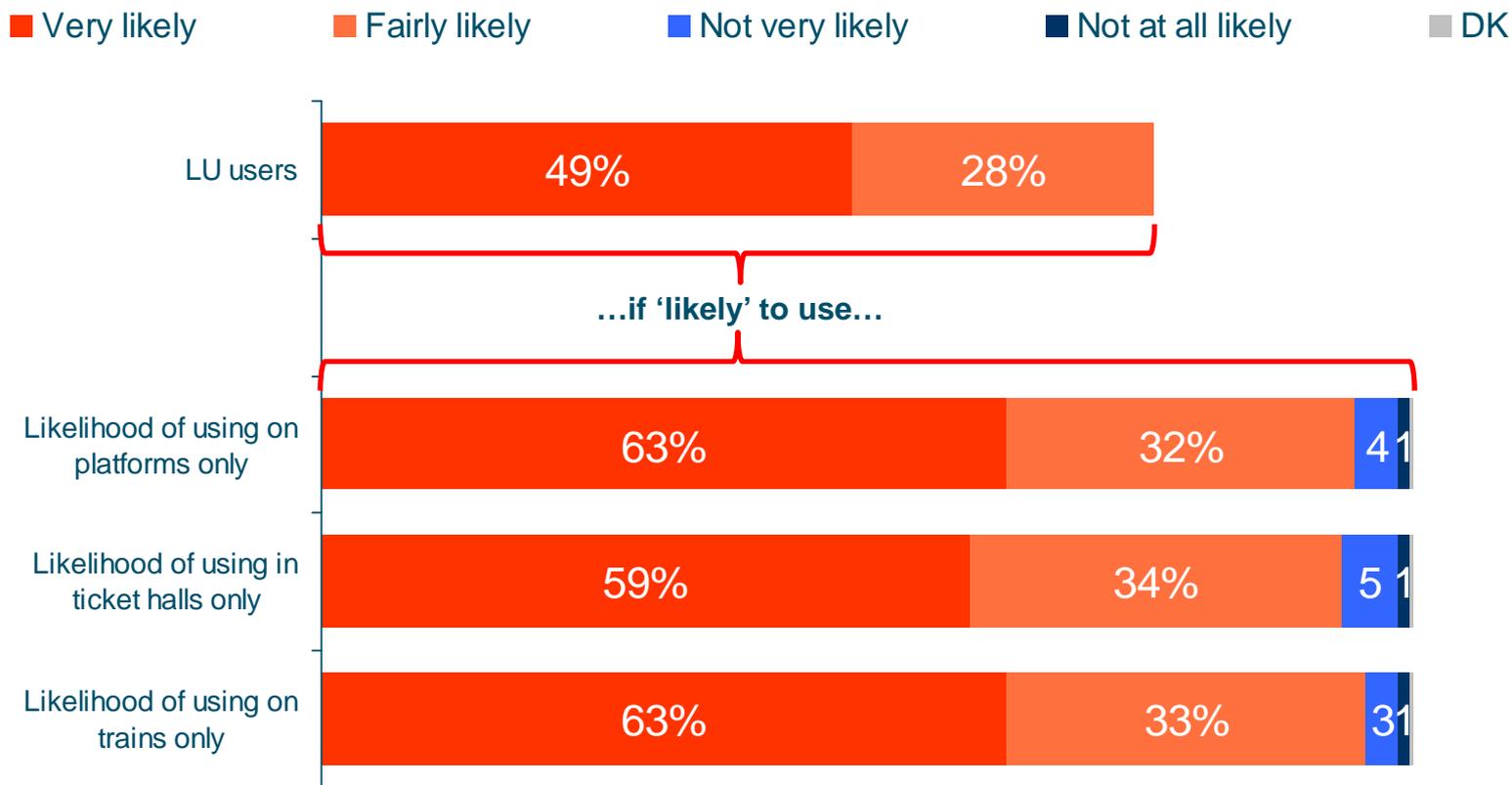| **Platforms**	• Difficulties: just on platforms would cause congestion and make it more difficult when boarding / leaving the carriage.

Ticket halls and walkways	• Most people under the impression they could already get a signal in a ticket hall if they wanted to make a call.
	 • Walkways cause difficulties:
	    • people not concentrating on where they are going;
	    • navigating through a busy system is already difficult.

All system, including trains	• Makes sense to have it everywhere: if it's possible to do it. then LU should go all the way. • People most likely to want to use their phones when the unexpected happens, e.g. when they're stuck in a tunnel and they want to let someone know they've been delayed.

Claimed likelihood of using mobiles on LU would be relatively unaffected by limiting the signal to certain parts of the system.

■ Very likely　　■ Fairly likely　　■ Not very likely　　■ Not at all likely　　■ DK

LU users	49%	28%

…if 'likely' to use…

Likelihood of using on platforms only	63%	32%	4 1
Likelihood of using in ticket halls only	59%	34%	5 1
Likelihood of using on trains only	63%	33%	3 1

Customers generally expect to be able to use their mobile 'as normal' on LU.

- **Of course, everyone would prefer not to pay!**
  - So used to having mobile reception everywhere.
  - Mobile usage seen as a right rather than a privilege.
  - People feel they already pay enough for tube travel.
- **Roaming charges**
  - Tend to dislike: associations with 'rip-off' international call charges.
  - However, it could help to police usage, i.e. limit to essential use.
  - Might feel tempted to use the service, at least in some situations.
- **Having to sign up to a specific provider**
  - Doesn't feel realistic: mobile providers couldn't afford to not have a signal if other operators are doing it.
  - It might tip the balance on choice of operator if undecided.
- **People <u>might</u> pay for:**
  - an LU 'bolt on', e.g. a small extra charge, pay as you go.
  - sign up as per WiFi – included as an add-on in ticket?

Conclusions & recommendations

Headlines

- People are generally accepting of the current situation of not being able to use their mobile.

- Use of mobiles on LU is more supported than opposed.
  Support among London residents has increased since 2007.
  However, it is not a strong requirement.

- If mobiles are able to be used on LU, most feel having reception would quickly become accepted and normalised.

- If mobiles are able to be used on LU, the service should be as normal to use as possible, and not costly to LU.

Conclusions and recommendations

- Introduction of mobile phones to LU should not be considered if it requires considerable extra investment from LU.
  - Not sufficiently important for customers to want to pay extra for it.
  - Not sufficiently important for LU to prioritise investment in this over other service improvements / developments.

- Introduction of mobile phones on LU may generate some initial negativity, but this is likely to pass relatively quickly.
  - The weight of opinion is support rather than opposition.
  - Most of those who oppose can envisage use in some situations.
  - This brings LU into line with almost all other places in London: people expect to 'normalise' quickly.
  - Most envisage that phone (voice call) use will be 'self-policing'.

Conclusions and recommendations

- At launch, communication should focus on…
    - the weight of opinion and levels of current use of mobiles on system;
    - the possibilities for access with the least impact on other passengers (e.g. SMS, email, mobile internet),
    (and acknowledgement that voice calls may not be so easy in many situations, to reassure that use may be minimal);
    - encouraging considerate use, especially for voice calls.

- A phased introduction is accepted, but raises expectations of a full (i.e. whole system) service over time.
    - Full station access to full train access is a logical development.
    - Access on trains is potentially most desirable / useful (at the point of delays, when least able to communicate with others quickly).

Thank you
Any questions?