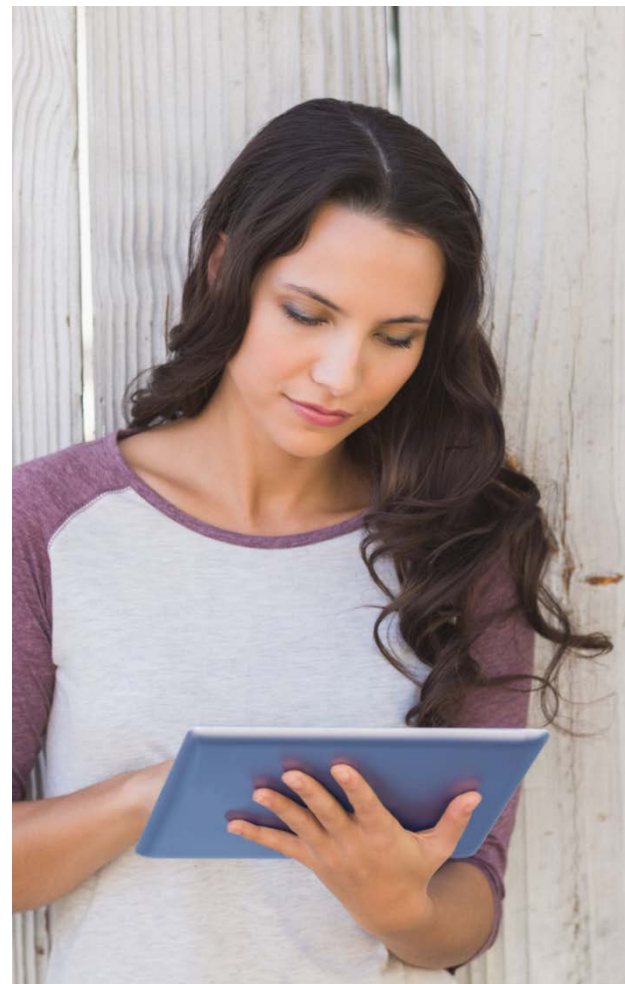


Digital and Social Media
Monitor – Autumn 2015
TfL number: 11726
FT number: J1836

Agenda

- Objectives and methodology
- Key headlines
- General internet usage
- Internet in relation to travel
- Apps and social media
- TfL website
- Other TfL digital sources used
- Discussion





Objectives

Understand digital media use by 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

- 1,017 online interviews with Londoners (representative of adults aged 16+)
- Fieldwork completed November 2015
- Data are 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, this wave the questionnaire has been revised so the majority of data is not comparable with previous data – time series data will start to build over future waves.
- Please note, 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 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



Key Headlines

Key Headlines

Awareness/ usage of digital travel information remains lower among older groups – announcements/ displays and staff are particularly important to older travellers as is consistency across sources

Half of online Londoners use apps to access London transport information (rising to 64% among under 35's)

Social media is used by 1 in 4 online Londoners for travel information, particularly Facebook and Twitter

The majority of online Londoners use the TfL website, with a quarter using it daily and the experience is rated well

A number of activities are carried out more on the TfL website (vs. the internet in general), however map use is considerably lower

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

Internet access and device usage

Almost all internet users access on a daily basis

99%



At home

100% (97% daily)



On the Move

78% (50% daily)



At work

65% (57% daily)

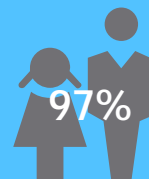
Data in this report is captured via an online survey and hence all participants have online access. Recent data collected by TfL (March 2015) showed 91% of Londoners had internet access

87% access through a mobile device (75% daily)

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

Main devices used:
• 78% use a smartphone
• 61% use a tablet

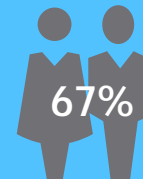
Older Londoners are least likely to use mobile devices to access the internet



16-34



35-54



55+

Other than app use, all other internet activities are carried out less on a mobile device, though looking up maps/ directions is the 2nd biggest activity on a mobile device

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

Internet in relation to travel

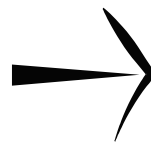
94% use the internet for travel purposes

- Maps & directions (91%)
- Live public transport information (79%)
- Making day to day travel plans (70%)

..and **83%** access the internet for travel purposes through a mobile device



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



57%



16-34



30%

35-54



8%

55+

Weekly business travellers = 70% 



Weekly commuters = 50%

Weekly personal business travellers = 45%

Weekly leisure travellers = 42%



Other groups also using the internet more for travel purposes (note that these are also impacted by age and journey purpose):

- Those in work
- ABC1s
- Inner Londoners
- Men
- Non-disabled Londoners

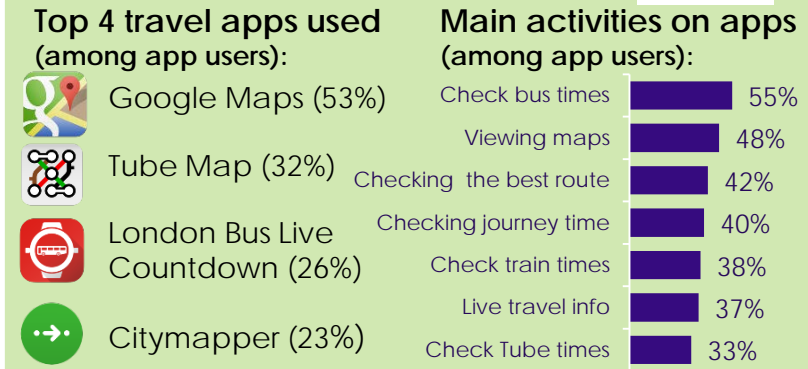
Half of online Londoners use journey planning apps and one in four use social media for travel purposes in London

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 **64%** among 16-34s



Checking bus times (+7%) is the main travel activity which is carried out more on an app vs. the internet in general

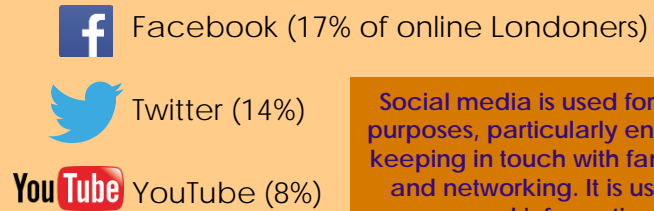
Social media

Over 4 in 5 (82%) online Londoners regularly use Social Media **95%** among 16-34s



1 in 4 (24%) use social media in relation to travel in London

Most used in relation to travel:

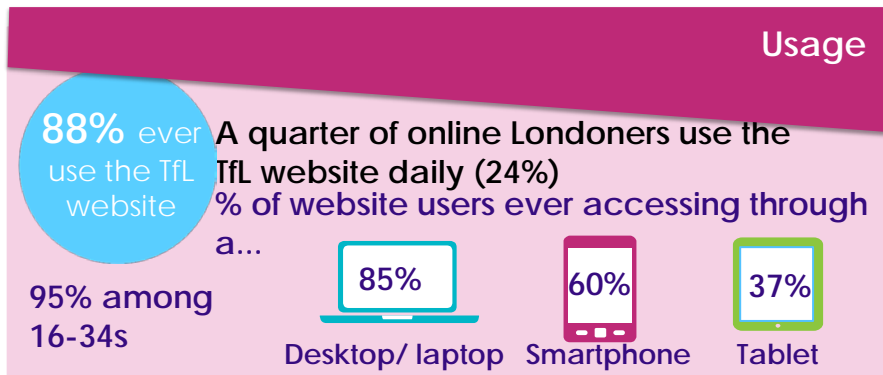


Social media is used for a range of purposes, particularly entertainment, keeping in touch with family/ friends and networking. It is used less for news and information than the internet in general



The majority of online Londoners use the TfL website for travel related information in London and the experience is rated well

TfL website



A number of activities are carried out more frequently on the TfL website vs. general internet use in relation to travel:



Though map usage is lower on the TfL website vs. the internet in general:

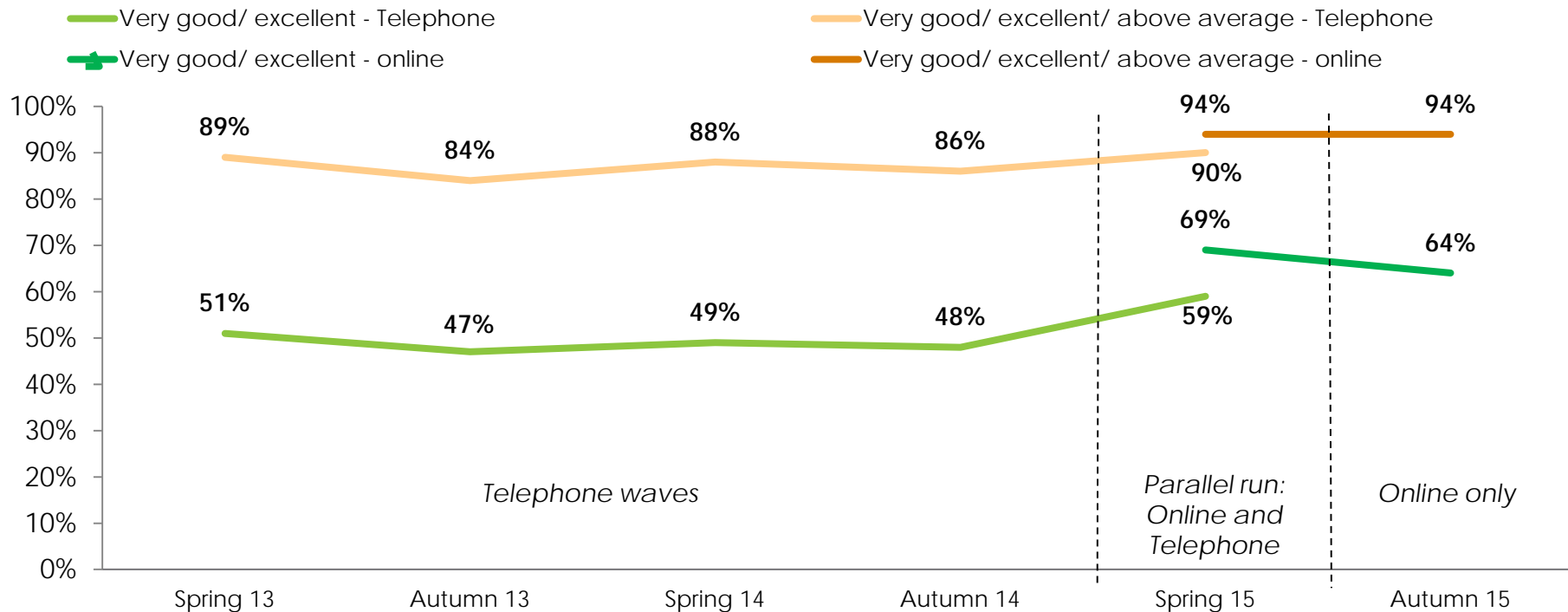
- Checking Tube times (+9%)
- Information about planned works/ closures (+8%)
- Check Oyster balance (+6%)
- Looking up live travel information (+5%)
- Checking bus times (+4%)



- Viewing maps (-22%)

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

Experience of the TfL website (TfL website users)

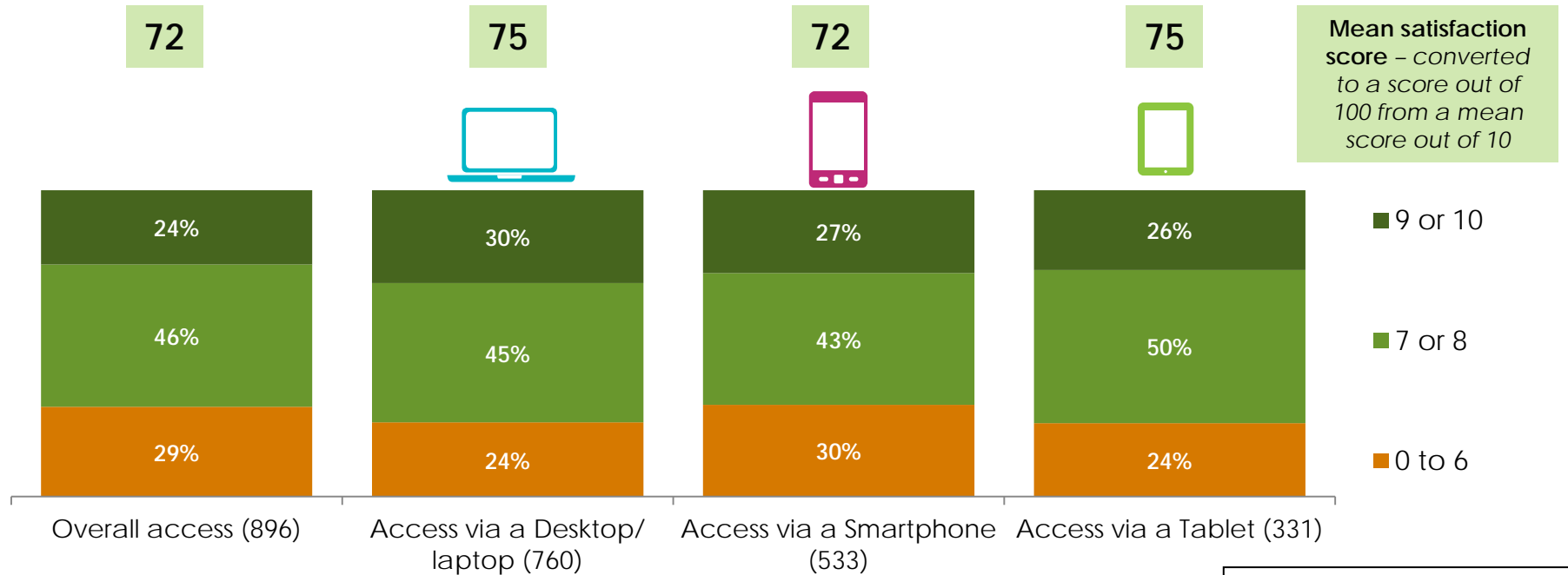


I10a: Please rate your experience of the TfL website overall...

Base: All respondents who have used the TfL website (Oct 2015 896; Apr 2015 684; Oct 2014 721; Apr 2014 691; Oct 2013 684; Apr 2013 707)

1 in 4 are 'very satisfied' with the TfL website – top level satisfaction is slightly higher when accessing on a desktop/ laptop than a mobile device

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



Over 55's are most likely to be highly satisfied (9-10/10) on a **desktop/ laptop** but **16-34's** are most likely through a **smartphone** or **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 (n=896);

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

Sources used for real-time travel information

Live digital displays

Tube Countdown display (61% regularly use)



Bus Countdown display (65% regularly use)



Next stop display (45% regularly use)



Electronic displays in Tube stations (31% regularly use)



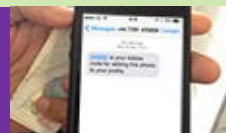
Staff when travelling (54% ever use)



TfL Twitter feed (21% ever use)



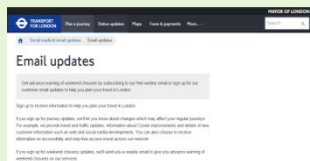
Bus times text service (39% ever use)



Email

Over half of online Londoners(55%) have received a TfL email with travel related information

Majority (91%) find these emails useful



Older people are more reliant on announcements/ displays and staff while travelling:

Announcements/ displays:

- 16-34 (47%)
- 35-54 (59%)
- 55+ (70%)

Staff:

- 16-34 (41%)
- 35-54 (42%)
- 55+ (51%)



Discussion



Thank you