RESEARCH SUMMARY

Title   Apps powered by TfL

Objective   To understand the transport apps market and whether customers have any unmet needs. To identify any gaps/opportunites for TfL that could help inform the development of TfL's apps strategy

Date   20/08/2015   **Agency**   2CV

Methodology   2 stage methodology: Stage 1 Market analysis including social media tracking & audit of existing TfL data
Stage 2: 4 x 1.5hr focus groups & pre-tasks with TfL: customers; mix of: modes; life-stage; Transport app usage (heavy, medium)

Abstract

Transport apps improve customer journeys and meet core travel needs (especially Journey planning and Service status) to a high standard. Account management (eg Oyster balance checking, top-up; refunds) is a key need that is not currently being met and awareness of solutions are low. There is a clear opportunity for TfL to play a bigger role in the account management app space. Security and trust are essential for account management apps and customers feel TfL is the only organisation that is trustworthy and credible enough to offer this. A 'best in class' app provided by TfL could support core reputational pillars (care for customers, value for money and progress). To minimise potential risk to reputation TfL should be cautious of competing with apps that are already meeting customers' needs to a very high standard and third party endorsement that could lead to perceptions of unjustified favouritism.

Key findings

Transport apps meet customer touchpoint needs and support an empowered journey experience, with customers using apps whenever they need travel information. Transport apps often replace and/or support other information sources including websites and in-station information (such as ESUBs, staff) and fill existing information gaps. Third party transport apps are providing this empowered experience and this is having an indirect positive impact on TfL's reputation.

Customers have three significant transport app needs: Journey planning; Service status; Account Management (Oyster Card management). Although Journey planning and Service status needs are already well served by apps, account management is much more limited. Customers have low awareness of apps that deliver an account management solution, but they are highly desirable. There is an opportunity for TfL in this space, as customers believe that TfL are best placed to access and manage their account (and financial)

information. As third party apps are already successfully delivering against customers' Journey planning and Service status needs, TfL would have to deliver to equally good standards to maintain credibility and reputation. Not delivering to this standard would have a negative impact on reputation.

Customers expect service oriented organisations to support their websites with an app and have high expectations for TfL to provide best in class apps. They are surprised to learn that TfL do not make the apps they are using. While there is some initial interest in TfL endorsing third party apps, there is some concern about how TfL would choose the specific apps they endorse, leaving the organisation open to accusations of favouritism. Customers value the idea of a TfL 'stamp of approval' – where transport apps meet specific TfL success criteria.

Job number:15023