## Contents

- Summary 5
- Internet access 9
- Internet access via mobile device 15
- TfL website use 22
- Journey information services 28
- Taxis/PHVs 33
- Next bus arrival service 36
- QR codes 38
- Appendix on methodology 40

### Reporting note

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

Throughout this report, data from January 2012 are compared with previous waves of research. Statistically significant differences with previous waves are shown as follows:

- [ ] Significantly higher than January 2011
- [ ] Significantly lower than January 2011
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Research conducted by SPA Future Thinking
Objectives and methodology

Monitoring the trend 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
- Own mobile phones and other devices
- Use mobile devices to access information online
- Access online services generally
- Use the TfL website

Methodology

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

Internet access

- Almost nine in ten Londoners have access to the internet at some place (88%). This level of internet access has remained fairly steady since the beginning of 2008
  - Most have access at home (86%), half at work (55%) and now half of Londoners have access ‘on the move’ (49%)
- Disabled Londoners, over 55 year olds and those in socio-economic groups DE continue to be more likely than others not to have internet access
- Almost all of those with access to the internet use it at least once a day (88%)

Activities undertaken online

- Sending and receiving emails and finding/sourcing information continue to be undertaken by almost all those with internet access (94% and 93% respectively)
- The proportion of internet users who buy goods and services online has increased again this year, rising to 87% (from 81%)
  - The top reasons why a minority of Londoners do not shop online are worries around security and a preference to visit shops

Internet access via a mobile device

- There has been strong growth in mobile internet in 2011, including increases in the proportion of Londoners accessing the internet via mobile devices, the frequency of use and in the range of activities carried out via mobile internet
- Over half of Londoners (58%) now own a smartphone of some type (up from 43% in 2010)
  - The proportion using each of the main smartphone brands is evenly split – 22% iPhones, 21% Blackberry and 18% Android
- Ownership of tablet computers has also grown significantly since last year – now 13% own tablets compared to 6% in 2011
- Over half of Londoners (55%) access the internet via a mobile device at least once a month, with 40% doing so everyday
- Internet activities undertaken on mobile devices have a similar pattern to general internet activities except for those relating to purchases/finance or which require large data downloads – where use is generally lower on mobile devices
  - Accessing live public transport information via mobile has risen to 64% of mobile internet users, from 58% (although this is not statistically significant)
  - Social networking and playing games are relatively higher on mobile devices than general internet use
Use of TfL’s website (all elements including Journey Planner, Congestion Charge, iBus, Oyster services)

- Three quarters of Londoners use TfL’s website, with over half of Londoners using it at least once a month.
- As with general internet access, older Londoners, those with a disability and those from socio-economic groups DE are less likely to use TfL’s website – this pattern (which was also seen in the 2011 wave of the research) is still present even after adjusting for internet access.
  - 86% of Londoners in full time work use the TfL website, compared with 77% of those working part time and just 58% 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, those not in work, and disabled Londoners)
- A third of Londoners access TfL’s website via a mobile device and 40% 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 (89%) – also over half access services from work/education (57%), and just under half from home (45%).
  - Just under three quarters (72%) of those accessing TfL’s website on mobile devices find it useful to be able to use this channel - and 40% score it 5 out of 5 on usefulness.

Journey information services

- TfL.gov.uk is the most commonly accessed source of online London travel information.
  - Eight out of ten Londoners that access the internet look at TfL.gov.uk for this information.
- TfL still leads the way for obtaining information about problems or delays encountered during journeys in London. Over a quarter of Londoners look to the TfL website for this information – though a similar proportion say they use Facebook for this.
- When asked what sources they are likely to use (about problems or delays encountered during journeys) in the future, 50% of Londoners say they would use TfL’s website on a mobile device. The attraction of ‘apps’ is evident, as nearly as many said they would use a mobile application (49%) while use of Twitter is not yet as strongly developed, as it was mentioned by 20% of Londoners.
- Only a small proportion (8%) of Londoners use social media to discuss day to day London travel or transport related issues – amongst those that do, Facebook is the most common platform used.
Taxi & private hire, next bus and QR codes

Taxi and private hire apps
- More than half of Londoners (55%) are aware of apps to book taxis or private hire vehicles
  - However, use is much lower – just 12% of those who are aware of these apps have downloaded one
- Of those who have not booked a taxi or minicab via an app, the main reason is a reported lack of need (by 45%). 24% prefer to book in a different way, 15% don’t have a mobile phone that could download apps, and 5% don’t know how to use Apps
  - This indicates barriers to using apps for booking taxis or minicabs are not strong

Next bus arrival service
- More than a third of Londoners (38%) are aware of the next bus arrival services (33% are aware of the website service, 32% the text/sms service)
  - 40% of those aware of the website service have used it, compared with 16% of those aware of the text service
  - The main reason for non-use is perceived lack of need

QR codes
- 18% of Londoners know what a QR code is
  - There are wide demographic variations with awareness highest amongst men, 25-44 year olds, white Londoners, AB Londoners and non-disabled Londoners
  - Of those who know what a QR code is, 36% have successfully scanned one, while 4% have tried unsuccessfully
Internet access
Internet access

Overall internet access seems to have reached a plateau

Now almost half of Londoners access the internet on the move

<table>
<thead>
<tr>
<th></th>
<th>2012 %</th>
<th>2011 %</th>
<th>2010 %</th>
<th>2009 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access anywhere</td>
<td>88</td>
<td>89</td>
<td>86</td>
<td>85</td>
</tr>
<tr>
<td>At home</td>
<td>86</td>
<td>85</td>
<td>82</td>
<td>79</td>
</tr>
<tr>
<td>At work</td>
<td>55</td>
<td>51</td>
<td>49</td>
<td>51</td>
</tr>
<tr>
<td>On the move</td>
<td>49</td>
<td>39</td>
<td>not asked</td>
<td></td>
</tr>
<tr>
<td>Do not have access</td>
<td>12</td>
<td>11</td>
<td>14</td>
<td>15</td>
</tr>
</tbody>
</table>

QINTER1 Do you access the internet...?
Base: All (2012 1,000; 2011 1,002; 2010 1,000; 2009 1,005)
EMU1a How often do you use the internet?
Base: All with internet access (2012, 835; 2011 847)

88% of Londoners that access the internet do so daily, up slightly from 85% on 2011
None say that they access the internet less than monthly

For comparison: ONS data shows London internet access for Q4 2011 was 87%
Over the past four years, internet access has remained stable with around 90% of Londoners accessing the internet.
Profile of non-users of the internet

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

That said, older Londoners are slightly more likely to use the internet than they were last year.

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

2011 percentages
11 0 1 2 6 17 51 14 6 1 6 25 5 7 23 26 41 8

2010 percentages
14 3 2 4 12 22 56 18 6 4 7 29 3 9 12 35 43 11
# Internet activities

There is continuing growth in buying goods and services online – to almost 9 in 10 internet users.

Three quarters (74%) of internet users check live public transport information (slightly down on 79% in 2011) and half (49%) buy train tickets online.

<table>
<thead>
<tr>
<th>Activity</th>
<th>2012 %</th>
<th>2011 %</th>
<th>2010 %</th>
<th>2009 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using email</td>
<td>94</td>
<td>94</td>
<td>93</td>
<td>93</td>
</tr>
<tr>
<td>Finding/sourcing information</td>
<td>93</td>
<td>93</td>
<td>88</td>
<td>87</td>
</tr>
<tr>
<td>Shopping/buying goods and services</td>
<td>87</td>
<td>81</td>
<td>78</td>
<td>72</td>
</tr>
<tr>
<td>Browsing for fun/general leisure</td>
<td>80</td>
<td>79</td>
<td>79</td>
<td>74</td>
</tr>
<tr>
<td>Accessing live public transport information</td>
<td>74</td>
<td>79</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Education related</td>
<td>71</td>
<td>73</td>
<td>60</td>
<td>51</td>
</tr>
<tr>
<td>Work related/as part of job</td>
<td>65</td>
<td>66</td>
<td>65</td>
<td>63</td>
</tr>
<tr>
<td>Watching video content</td>
<td>61</td>
<td>66</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Banking</td>
<td>64</td>
<td>64</td>
<td>57</td>
<td>56</td>
</tr>
<tr>
<td>Making day to day travel plans</td>
<td>63</td>
<td>63</td>
<td>79*</td>
<td>78*</td>
</tr>
<tr>
<td>Social networking</td>
<td>65</td>
<td>62</td>
<td>57</td>
<td>49</td>
</tr>
<tr>
<td>Downloading/listening to music</td>
<td>54</td>
<td>53</td>
<td>47</td>
<td>50</td>
</tr>
<tr>
<td>Purchasing train tickets</td>
<td>49</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Playing games</td>
<td>33</td>
<td>30</td>
<td>32</td>
<td>27</td>
</tr>
</tbody>
</table>

*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 (2012 883; 2011 841; 2010 803; 2009 847)**
Buying goods online

Shopping online continues to increase in popularity amongst internet users

Amongst internet users who do not shop online, significantly fewer say their reason for not doing so is because of being worried about identity theft (compared to 2011)

**Reasons for not shopping online**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Worried about security</td>
<td>35</td>
<td>35</td>
<td>46</td>
<td>45</td>
</tr>
<tr>
<td>Prefer visiting shops</td>
<td>27</td>
<td>27</td>
<td>25</td>
<td>17</td>
</tr>
<tr>
<td>Prefer to see what I’m buying</td>
<td>12</td>
<td>18</td>
<td>19</td>
<td>16</td>
</tr>
<tr>
<td>Worried about identity theft</td>
<td>6</td>
<td>15</td>
<td>15</td>
<td>10</td>
</tr>
<tr>
<td>Don’t have credit card</td>
<td>6</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Others less than 5% each

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

EMU4: You mentioned that you do not buy goods/services online. Why is that? Base: All who have internet access but have not bought anything online (2012 122; 2011 185; 2010 163; 2009 187)
Internet access via mobile device
Mobile device ownership

Over half of Londoners (58%) now have a smartphone

Although owners of tablets are still in the minority, there are twice as many than a year ago

<table>
<thead>
<tr>
<th>Device Type</th>
<th>2012 %</th>
<th>2011 %</th>
<th>2010 %</th>
<th>2009 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard mobile phone</td>
<td>47</td>
<td>57</td>
<td>66</td>
<td>70</td>
</tr>
<tr>
<td>Laptop or Netbook</td>
<td>57</td>
<td>47</td>
<td>43</td>
<td>n/a</td>
</tr>
<tr>
<td>Blackberry</td>
<td>21</td>
<td>18</td>
<td>12</td>
<td>9</td>
</tr>
<tr>
<td>iPhone</td>
<td>22</td>
<td>16</td>
<td>14</td>
<td>4</td>
</tr>
<tr>
<td>Android</td>
<td>18</td>
<td>14</td>
<td>9</td>
<td>6</td>
</tr>
<tr>
<td>Other Smartphone</td>
<td>6</td>
<td>14</td>
<td>9</td>
<td>6</td>
</tr>
<tr>
<td>Other portable internet device that cannot</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>be used as a phone (eg iPod Touch)</td>
<td>12</td>
<td>8</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Tablet computer (eg iPad)</td>
<td>13</td>
<td>6</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>None of the above</td>
<td>3</td>
<td>6</td>
<td>8</td>
<td>14</td>
</tr>
</tbody>
</table>

**Note:**
- 2012 first year to ask about Android, previously included in other smartphone
- 2011 includes Android

EMU6: Which, if any, of the following types of mobile phone or other mobile device do you use?
Base: All respondents (2012 1,000; 2011 1,002; 2010 1,000; 2009 1,005)
Internet access via a mobile device

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

40% of Londoners access mobile internet every day

<table>
<thead>
<tr>
<th>2012 %</th>
<th>2011 %</th>
<th>2010 %</th>
<th>2009 %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Oct</td>
<td>Jul</td>
<td>Apr</td>
</tr>
<tr>
<td>Ever use</td>
<td>58</td>
<td>55</td>
<td>54</td>
</tr>
<tr>
<td>Everyday</td>
<td>40</td>
<td>39</td>
<td>33</td>
</tr>
<tr>
<td>Up to three or four times a week</td>
<td>7</td>
<td>7 (51%)</td>
<td>9 (49%)</td>
</tr>
<tr>
<td>Up to three or four times a month</td>
<td>5</td>
<td>3 (49%)</td>
<td>4 (49%)</td>
</tr>
<tr>
<td>About once a month</td>
<td>3</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Less than once a month</td>
<td>3</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Never/do not use the internet</td>
<td>42</td>
<td>43</td>
<td>45</td>
</tr>
<tr>
<td>Don’t know</td>
<td>0</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

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)
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 C2DE 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
Activities accessed on mobile devices

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

There has been a rise in accessing live public transport information via mobile devices, from 58% to 64% of mobile internet users; 11% purchase train tickets via mobile internet.

<table>
<thead>
<tr>
<th>Activity</th>
<th>2012 %</th>
<th>2011 %</th>
<th>2010 %</th>
<th>2009 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using email</td>
<td>89</td>
<td>82</td>
<td>74</td>
<td>61</td>
</tr>
<tr>
<td>Finding/sourcing information</td>
<td>67</td>
<td>60</td>
<td>67</td>
<td>52</td>
</tr>
<tr>
<td>Browsing for fun/general leisure</td>
<td>69</td>
<td>58</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Social networking</td>
<td>53</td>
<td>47</td>
<td>47</td>
<td>39</td>
</tr>
<tr>
<td>Accessing live public transport information</td>
<td>64</td>
<td>60</td>
<td>44</td>
<td>34</td>
</tr>
<tr>
<td>Work related/as part of job</td>
<td>50</td>
<td>45</td>
<td>45</td>
<td>49*</td>
</tr>
<tr>
<td>Making day to day travel plans</td>
<td>44</td>
<td>37</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Watching video content</td>
<td>37</td>
<td>35</td>
<td>24</td>
<td>12</td>
</tr>
<tr>
<td>Playing games</td>
<td>45</td>
<td>33</td>
<td>33</td>
<td>23</td>
</tr>
<tr>
<td>Education related</td>
<td>36</td>
<td>33</td>
<td>21</td>
<td>14</td>
</tr>
<tr>
<td>Downloading/listening to music</td>
<td>28</td>
<td>28</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Shopping/buying goods and services</td>
<td>19</td>
<td>19</td>
<td>10</td>
<td>13</td>
</tr>
<tr>
<td>Banking</td>
<td>11</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

*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 (2012 460; 2011 400; 2010 279; 2009 159)
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 purchasing train tickets (in particular) 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 (2012 580; 2011 400; 2010 279; 2009 159)

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

Most Londoners who use mobile devices for banking check their balance, while fewer make funds transfers or pay bills on their mobile device. In contrast, amongst those using general internet channels for banking, most complete a range of activities online.

% of Londoners that bank online…

<table>
<thead>
<tr>
<th>Activity</th>
<th>General Internet</th>
<th>Mobile Devices</th>
</tr>
</thead>
<tbody>
<tr>
<td>check balances</td>
<td>96%</td>
<td>92%</td>
</tr>
<tr>
<td>make funds transfers</td>
<td>86%</td>
<td>58%</td>
</tr>
<tr>
<td>pay bills</td>
<td>79%</td>
<td>42%</td>
</tr>
</tbody>
</table>

EMU3b: You mentioned that you bank online, do you do any of the following online?  
Base all banking online (503)

EMU8i: You mentioned that you bank using your mobile device, do you do any of the following using your mobile device?  
Base: All respondents who use a mobile device for internet banking (97)
TfL website use
# Use of TfL’s website

Three quarters of Londoners use TfL’s website

Frequency of use mirrors that observed in previous years

<table>
<thead>
<tr>
<th>Frequency of Use</th>
<th>2012 %</th>
<th>2011 %</th>
<th>2010 %</th>
<th>2009 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any use</td>
<td>74</td>
<td>75</td>
<td>68</td>
<td>68</td>
</tr>
<tr>
<td>Everyday</td>
<td>6</td>
<td>5</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Up to three or four times a week</td>
<td>21</td>
<td>20</td>
<td>16</td>
<td>14</td>
</tr>
<tr>
<td>Up to three or four times a month</td>
<td>17</td>
<td>18</td>
<td>18</td>
<td>19</td>
</tr>
<tr>
<td>About once a month</td>
<td>14</td>
<td>18</td>
<td>17</td>
<td>17</td>
</tr>
<tr>
<td>Less than once a month</td>
<td>15</td>
<td>14</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Never/do not use the internet</td>
<td>26</td>
<td>25</td>
<td>31</td>
<td>30</td>
</tr>
<tr>
<td>Don’t know</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

*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 (2012 1,000; 2011 1,002; 2010 1,000; 2009 1,005)*
Profile of TfL website users

TfL’s website is very commonly 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, DEs, non-working and disabled 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: Londoners
The proportion of Londoners using TfL’s website via mobile has increased to 32% in 2012.

**EMU9a: How often, if at all, do you use TfL’s website on your mobile device?**
*Base: All (1,000)*
Accessing TfL’s website from a mobile device

40% of those accessing TfL’s website from a mobile device do so at least three or four times a week.

Location of access is quite diverse: although most users access TfL’s website from a mobile device when on the move, substantial proportions also do so at home and from work/education.

**Frequency of access amongst users**

- Everyday: 26%
- Up to three or four times a month: 20%
- Up to three or four times a week: 12%
- About once a month: 15%
- Less than once a month: 28%

**Where access TfL from on mobile device**

- At home: 45%
- At work/education: 57%
- On the move: 89%

EMU9a: How often, if at all, do you use TfL’s website on your mobile device? Base: All who use mobile phone or other portable internet device
EMU9c: Do you access TfL’s website on your mobile device when you are... Base: All that access TfL’s website on mobile device (240)
Usefulness of accessing TfL’s website via mobile

Almost three quarters of Londoners that access TfL on a mobile device find it useful, (40% say it is ‘very useful’)

There has also been a slight increase in usefulness observed by Londoners since last year

72% find it useful to access TfL via a mobile device

EMU9b: And how useful do you find it to access TfL’s website on your mobile device?
BASE: All that access TfL on mobile device (excluding don’t knows) (2012 240; 2011 215)
Journey information services
Comparative position of tfl.gov.uk

TfL’s website continues to lead the way in terms of providing London travel information

PCs and laptops remain are by far the most commonly used devices for this type of information

**Device used to access London travel information**

<table>
<thead>
<tr>
<th></th>
<th>Ever</th>
<th>Most often</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC/Laptop</td>
<td>91%</td>
<td>53%</td>
</tr>
<tr>
<td>Mobile phone</td>
<td>44%</td>
<td>43%</td>
</tr>
<tr>
<td>Tablet</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>Do not access</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>London public</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>transport info</td>
<td></td>
<td></td>
</tr>
<tr>
<td>online</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Venue listings</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Other London</td>
<td>39%</td>
<td></td>
</tr>
<tr>
<td>news based sites</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(e.g. Metro)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facebook</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Transport and</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>travel websites</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(e.g. National</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rail)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Google</td>
<td>59%</td>
<td></td>
</tr>
<tr>
<td>tfl.gov.uk</td>
<td>79%</td>
<td></td>
</tr>
</tbody>
</table>

This year, options were read to respondents meaning that results are not comparable with previous waves

EMU12: Which online sources of information do you use to access London travel information?
Base: All who have access/use the internet or who use mobile phone/other portable internet device (837)
Use of online sources to find out about problems and delays during journeys

There has been growth in Londoners using mobile apps to check on problems and delays during journeys, and a fall in users of non-TfL websites.

TfL’s website and Facebook are the most commonly mentioned online sources for Londoners for finding out about problems and delays during journeys.

Use of digital media for checking London travel information during journeys

- TfL’s website on a mobile device: 27% (2012), 25% (2011)
- Mobile application: 22% (2012), 16% (2011)
- Facebook: 26% (2012), 18% (2011)
- A non-TfL website that features live London travel news: 19% (2012), 23% (2011)
- TfL SMS/text messaging services: 11% (2012), 10% (2011)
- Twitter: 8% (2012)

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 (1,000)
Half of Londoners say they would use TfL’s website on a mobile device to find out about problems and delays during journeys. Nearly as many said they would use a mobile application (49%) while use of Twitter is not yet as strongly developed, mentioned by 20% of Londoners.

**Likely use of online information sources relating to problems and delays**

- TfL’s website on a mobile device: 50%
- Mobile application: 49%
- Facebook: 39%
- A non-TfL website that features live London travel news: 35%
- TfL SMS/text messaging services: 28%
- Twitter: 20%

“Likely to use” was only asked of non-users in 2011 and therefore comparison with 2012 is not possible.

*EMU11b: Are you likely to use... In the future? Base All respondents (1,000)*
Social media

Using social media to discuss London travel is still a minority activity

Facebook is the most commonly mentioned medium for those that do

Only 8% use social media to discuss day to day London travel or transport related issues?

- Facebook: 5%
- Twitter: 2%
- YouTube: 1%

Note: TfL’s regular social media monitoring highlights a large number of content generated on Twitter relating to TfL – however it is not possible to monitor Facebook users without prior permission from each user.

EMU14: Do you use social media to discuss day to day London travel or transport related issues? BASE: All (1,000)
Taxi and private hire Apps
Awareness of TPH apps and proportion of Londoners to have downloaded one

More than half of Londoners are aware of TPH apps

However, the proportion of Londoners downloading these apps is relatively low

**TPH1**: Are you aware that there are mobile Apps which allow you to book taxis or minicabs in London? (base 1,000)

**TPH2**: Have you ever downloaded an App which would allow you to book taxis or minicabs? (base 507)
Use and non-use of TPH apps

Of those who have downloaded an app, Addison Lee is the most common; fewer than half of those with an app have used it to make a booking. However, there are few identified obstacles to use – many Londoners just haven’t needed to – and those who have used the services have generally found it easy and been satisfied.

Most popular apps (% of those downloading any app)

<table>
<thead>
<tr>
<th>App</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addison Lee</td>
<td>37%</td>
</tr>
<tr>
<td>Cabbie</td>
<td>27%</td>
</tr>
<tr>
<td>Cab:app</td>
<td>6%</td>
</tr>
<tr>
<td>HailO</td>
<td>5%</td>
</tr>
</tbody>
</table>

40% of those with app downloaded have made a booking (3% of all Londoners)

- 12% a taxi app
- 33% a minicab app

- Of these (15 people), 12 gave a satisfaction rating of 8-10 out of 10, 1 between 5-7, and 2 between 0-4
- 14 out of 15 found it ‘quite easy’ or ‘very easy’ to use

Reasons for not using App to book taxi or minicab

- Haven't needed to: 45
- Prefer another method: 24
- My mobile can't download apps: 15
- Don't know how to use apps: 5

TPH2a: Which Apps have you downloaded? (base 40)
TPH3: Have you actually booked a taxi or minicab through an App? (base 40)
TPH4a/c: how satisfied are you with booking taxis or minicabs via a mobile App? / how easy is it to use a mobile App to book taxis or minicabs? (base 15)

TPH4: Why haven’t you booked a taxi or minicab through an App? (base 492)
Next bus arrival service
Next bus arrival service

Around a third of Londoners are aware of the next bus arrival service

Use of the website and SMS messaging to gain real-time travel information for buses is still low compared to use of TfL’s website overall; the main reason for lack of use is ‘no need’

### Awareness of next bus arrival service

<table>
<thead>
<tr>
<th>Yes aware of either website of SMS</th>
<th>Website</th>
<th>SMS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>38%</td>
<td>33%</td>
</tr>
</tbody>
</table>

#### Website

- **40% of those aware have used** (13% of Londoners)

  - Top reasons among those that don’t use:
    - Not had need to use (32% of those aware but not used)
    - Buses run regularly anyway (9%)
    - Don’t have access to the internet (8%)
    - Don’t use buses (7%)
    - Bus stops already have countdown (7%)

#### SMS

- **16% of those aware have used** (5% of Londoners)

  - Top reasons among those that don’t use:
    - Not had need to use (33% of those aware but not used)
    - Prefer to use the website (9%)
    - Cost issues (9%)
    - Not interested (7%)

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*iBUS1: Transport for London offers up-to-the-minute bus information where you can find out the times of the next buses at specific bus stops by looking at the TfL website, or by texting the number of the bus stop to TfL. Were you aware of those two services? (base 1,000)*

*iBUS2: Have you ever used this service? (base 319)*

*iBUS3: Why have you not used the service? (base 209)*
QR codes
Understanding of QR codes

18% of Londoners as a whole know what QR codes are; however there are large variations according to demographics.

36% of those aware of QR codes have scanned one successfully (and 4% have tried but couldn’t do it).

EMU8a: Do you know what a QR code is? Base: all (1,000)
EMU8b: Have you ever scanned a QR code on your mobile phone? Base: who know what QR codes are (150)
Appendix
The research comprised 1,000 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 12th and 31st January 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.