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Prepared by: Future Thinking
Objectives

Understand digital media use of 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

• 1,192 online interviews with Londoners (representative of adults aged 16+)
• Fieldwork completed March 2016
• Data 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:
  – In Autumn 2015 the questionnaire was revised so the majority of data is not comparable prior to that – time series data will continue to build over future waves
  – 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 was captured via an online survey and hence all participants have online access. Data collected by TfL in March 2015 showed 91 per cent of Londoners had internet access – data on slide eight has been rebased on all Londoners, all other slides are based on online Londoners.
Key Headlines
Key Headlines

The internet continues to be used for London travel information by almost all online Londoners, with the majority also accessing through mobile devices.

Travel apps were used by just under half of online Londoners for London travel information and to a lesser extent social media was used too (used by one in five).

TfL website use was slightly higher than in Autumn 15 and the experience continued to be rated well (in line with Autumn 15).

The information, the tools provided and ease of use were key triggers for high satisfaction with the TfL website.

A mix of information sources are still required; almost one in ten Londoners do not use the internet and older online Londoners use of digital media continues to be lower.
Summary
Most Londoners use the internet on a daily basis. The majority use the internet for travel purposes and a high level access the TfL website.

Key figures rebased on all Londoners

91% of Londoners have internet access (According to data collected by TfL, in March 2015)

<table>
<thead>
<tr>
<th>Ever access the internet</th>
<th>81% access through a mobile device (70% daily)</th>
</tr>
</thead>
<tbody>
<tr>
<td>At home</td>
<td>Mobile device users defined as smartphone, tablet, standard mobile or wearable device users</td>
</tr>
<tr>
<td>91% (88% daily)</td>
<td>Main devices used:</td>
</tr>
<tr>
<td>On the Move</td>
<td>• 73% use a smartphone</td>
</tr>
<tr>
<td>72% (46% daily)</td>
<td>• 58% use a tablet</td>
</tr>
<tr>
<td>At work</td>
<td>22% use the TfL website daily</td>
</tr>
<tr>
<td>59% (50% daily)</td>
<td>Other online TfL sources used</td>
</tr>
<tr>
<td></td>
<td>• TfL email (48% have received)</td>
</tr>
<tr>
<td></td>
<td>• TfL’s Twitter feed (18% ever use)</td>
</tr>
</tbody>
</table>

86% ever use the internet for travel purposes
- Maps & directions (82%)
- Live public transport information (73%)
- Making day to day travel plans (66%)

..and 67% ever access the internet for travel purposes through a mobile device

“Data rebased on all Londoners, assuming a 91% level of internet penetration (Source: DMM March 2015)”
Internet usage is an integral part of daily life, including access through mobile devices. However, over 55s were again 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**: 79% (51% daily)
- **At work**: 65% (55% daily)

Internet access and device usage

89% access through a mobile device (77% 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.**

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

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

- **16-34**: 97%
- **35-54**: 94%
- **55+**: 68%

Email, finding information, buying goods and services and looking at maps and directions continued to be the main activities carried out on the internet by online Londoners.
Almost all online Londoners use the internet for travel purposes, again higher among younger Londoners and regular business travellers.

Internet in relation to travel

95% use the internet for travel purposes

• Maps & directions (90%)
• Live public transport information (80%)
• Making day to day travel plans (72%)

..and 74% of online Londoners 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
34% 35-54
12% 55+

Weekly business travellers = 67%
Weekly commuters = 53%
Weekly personal business travellers = 45%
Weekly leisure travellers = 45%

Data based on online Londoners
Just under half of online Londoners use journey planning apps and one in five use social media for travel purposes in London.

**Apps**

Three quarters (77%) of online Londoners use apps.

Just under half (46%) use apps for travel in London.

Top 4 travel apps used (among app users):

- Google Maps (53%)
- Tube Map (31%)
- Citymapper (23%)
- London Bus Live Countdown (22%)

Main activities on apps (among app users):

- Check bus times: 52%
- Checking the best route: 43%
- Viewing maps: 42%
- Checking journey time: 40%
- Live travel information: 38%
- Check tube times: 33%

**Social media**

Nearly 9 in 10 (89%) ever use any social media.

Use:

- Facebook: 80%
- Twitter: 47%

1 in 5 (20%) use social media in relation to travel in London.

Most used in relation to travel:

- Facebook: (14% of online Londoners)
- Twitter: (13%)
- Google+: (8%)

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.

Data based on online Londoners.
Over 9 in 10 online Londoners use the TfL website, a significant increase since autumn 15 - the experience continues to be rated well.

**Main activities carried out on the TfL website:**

- Checking best route (53%)
- Live travel information (51%)
- Checking bus times (49%)
- Checking journey times (43%)
- Checking Tube times (41%)
- Information about planned works/closures (40%)

**Customer experience of the TfL website continues to be very positive**

- 94% rate ‘above average’ or higher

**Usage**

- 91% ever use the TfL website
- 95% among 16-34s
- 81% Desktop/laptop
- 58% Smartphone
- 34% Tablet

**Experience of TfL website**

- Mean satisfaction score = 72%

**Main reasons for being satisfied with the TfL website (rated 7-10 out of 10)**

- **Information** 27%
- **Tools** 17%
- **Usability** 17%

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Data based on online Londoners

Estimated KPI is ~90% from telephone research (see slide 39 for more details).
Use of the TfL website among online Londoners significantly increased from Autumn 15

Frequency of usage of the TfL website (online Londoners)

- **Ever use - Telephone**: 68%, 75%, 74%, 77%, 77%, 76%, 76%, 81%, 76%.
- **Use Daily - Telephone**: 5%, 5%, 6%, 10%, 10%, 10%, 11%, 9%, 12%.
- **Ever use - Online**: 88%, 88%, 91%.
- **Use Daily - Online**: 22%, 24%, 24%.

Parallel run: Online and Telephone
- **Online only**: 91%.
- **Telephone only**: 100%.

Legend:
- = Significant increase vs. Autumn 15 at a 95% confidence level
- = Significant decrease vs. Autumn 15 at a 95% confidence level

19. How often do you use the TfL website?
Base: Spring 2016, all respondents (n=1192); All other waves (circa, n=1000+)
Experience of the TfL website remains positive, with 19 out of every 20 website users rating it above average or higher

The KPI score from online data remained in line with the previous wave, therefore we have extrapolated the result of the telephone score from the previous telephone wave (Spring 15)

10a: Please rate your experience of the TfL website overall…
Base: All respondents who have used the TfL website (Spring 2016 n=1080; Autumn 2015 n= 896; Spring 2015 n=684; Autumn 2014 n=721; Spring 2014 n=691; Autumn 2013 n=684; Spring 2013 n=707)
Mean satisfaction remained in line with Autumn 15, with a mean percentage of 72 per cent.

Mean satisfaction with the TfL website (TfL website users) – new scale

Mean satisfaction score – converted to a score out of 100 from a mean score out of 10.

I10b. Thinking of the TfL website overall, how satisfied are you with?
Base: TfL website users (Spring 2016 n=1080; Autumn 2015 n=896)
In addition to the website again a range of other TfL information sources were 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**

<table>
<thead>
<tr>
<th>Source</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bus Countdown display</strong></td>
<td>66% regularly use</td>
</tr>
<tr>
<td><strong>Tube Countdown display</strong></td>
<td>59% regularly use</td>
</tr>
<tr>
<td><strong>Next stop display</strong></td>
<td>47% regularly use</td>
</tr>
<tr>
<td><strong>Electronic displays in Tube stations</strong></td>
<td>30% regularly use</td>
</tr>
</tbody>
</table>

---

**Email**

- Over half of online Londoners (53%) have received a TfL email with travel related information.
- Majority (93%) find these emails useful.

---

**Staff when travelling**

- **49%** ever use
- **20%** ever use

---

**TfL Twitter feed**

- **20%** ever use

---

**Bus times text service**

- **39%** ever use

---

**Live digital displays**

- **Next stop display**
  - 16-34 (42%)
  - 35-54 (57%)
  - 55+ (74%)

---

**Electronic displays in Tube stations**

- **30%** regularly use

---

**Next stop display**

- **47%** regularly use

---

**Data based on online Londoners**

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**Older people are more reliant on announcements/displays and staff while travelling (use real-time travel information):**

- **Announcements/displays:**
  - 16-34 **(42%)**
  - 35-54 **(57%)**
  - 55+ **(74%)**

- **Staff:**
  - 16-34 **(27%)**
  - 35-54 **(42%)**
  - 55+ **(49%)**
Internet access and device usage
All access the internet at home, four in five access the internet on the move and nearly two thirds access at work

Frequency of internet usage (online Londoners)

<table>
<thead>
<tr>
<th></th>
<th>Autumn 15</th>
<th></th>
<th>Autumn 15</th>
<th></th>
<th>Autumn 15</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>At Home</td>
<td>On the Move</td>
<td>At Work</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(100% access here)</td>
<td>(79% access here)</td>
<td>(65% access here)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Several times a day</td>
<td>86%</td>
<td>38%</td>
<td>44%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Once a day</td>
<td>10%</td>
<td>13%</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Up to three or four</td>
<td>2%</td>
<td>12%</td>
<td>5%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>times a week</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Up to three or four</td>
<td>0%</td>
<td>7%</td>
<td>3%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>times a month</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>About once a month</td>
<td>0%</td>
<td>4%</td>
<td>1%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than once a</td>
<td>1%</td>
<td>5%</td>
<td>1%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>month</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

11: How often do you access the internet in each of these places? Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017)
Though PCs/laptops are the most used devices, nearly nine in ten access the internet on a mobile device (notably through a smartphone/tablet).

Devices used to access the internet (online Londoners)

89% accessed the internet on any mobile device vs. 87% in Autumn 2015 (Net: Smartphone, tablet, standard mobile or wearable device)

On average 3.2 devices were used
- Used one device only (12%)
- Two devices (22%)
- Three devices (31%)
- Four devices (19%)
- Five or more (16%)

I3. Which of the following devices do you use to access the internet?
Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017)
Smartphone and tablet usage remains higher among under 55s, ABC1s, those in work and inner Londoners

Use of tablets and smartphone devices demographic breakdown (online Londoners)

<table>
<thead>
<tr>
<th>% use a tablet</th>
<th>Male</th>
<th>Female</th>
<th>16-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>64%</td>
<td>63%</td>
<td>68%</td>
<td>69%</td>
<td>49%</td>
</tr>
<tr>
<td>% use a smartphone</td>
<td>Male</td>
<td>Female</td>
<td>16-34</td>
<td>35-54</td>
<td>55+</td>
</tr>
<tr>
<td></td>
<td>80%</td>
<td>81%</td>
<td>92%</td>
<td>88%</td>
<td>49%</td>
</tr>
</tbody>
</table>

I3. Which of the following devices do you use to access the internet?

Base: Male (538); Female (654); 16-34 (385); 35-54 (476); 55+ (331); ABC1 (858); C2DE (334); Work (783); Not working (409); Inner (428); Outer (764)

= Significant increase vs. Autumn 15 at a 95% confidence level
= Significant decrease vs. Autumn 15 at a 95% confidence level
As seen in Autumn 15, Androids were the most used smartphones, followed by Apple phones.

Type of smartphone used (smartphone users)

<table>
<thead>
<tr>
<th>Type of Smartphone</th>
<th>Autumn 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Android</td>
<td>59%</td>
</tr>
<tr>
<td>Apple</td>
<td>47%</td>
</tr>
<tr>
<td>Windows</td>
<td>16%</td>
</tr>
<tr>
<td>Blackberry</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
</tr>
</tbody>
</table>

Among smartphone users, over 55s were less likely to own an Apple Phone (29% vs. 47% total).

I3b. Which of these devices do you use to access the internet?

Base: Smartphone users (Spring 16 = 937; Autumn 15 n=784)

= Significant increase vs. Autumn 15 at a 95% confidence level
= Significant decrease vs. Autumn 15 at a 95% confidence level
Wearable device usage was in line with Autumn 15 with no observed increase following Christmas

Type of wearable device used (online Londoners)

Wearables used (Spring 2016)

- Apple smartwatch = 7% (66% of wearable users)
- Health or activity monitor device = 6% (62% of wearable users)
- Virtual reality devices = 4% (40% of wearable device users)
- Other smartwatch (not Apple) = 4% (37% of wearable users)

Spring 2016
10% used at least one wearable device

Autumn 2015
11% used at least one wearable device

Please note, this was a new question in Spring 2016

I3bii. And which of the following types of wearable devices do you use?
Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017); Wearable device users (Spring 16=105)
Almost all online Londoners access the internet for travel related information

Reasons for using the internet (online Londoners/ mobile device users)

**95% use the internet for travel purposes**
(looking up maps and directions, accessing live public transport information or making day to day travel plans)

Main activities carried out online:
- Email (97%)
- Finding/ sourcing information (92%)
- Buying goods/ services (90%)
- Looking up maps and directions (90%)

**Was 94% in Autumn 15**

**84% of those accessing the internet through a mobile device use a mobile device for travel purposes**

Main activities carried out online in Autumn 15:
- Email (98%)
- Finding/ sourcing information (93%)
- Buying goods/ services (91%)
- Looking up maps and directions (91%)

**Was 83% in Autumn 15**

As seen in Autumn 15, less activities on average were carried out on a mobile device compared with the internet in general (9 vs. 11.4) – looking up maps and directions remained the second highest internet activity on a mobile device.

---

I2. Which of the following do you use the internet for? Is. And which of the following do you use the internet for on a mobile device?
Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017); Access the internet through a mobile device (Spring 16 n=1044; Autumn 15 n=888)
Accessing digital travel and journey planning information
Over one third use the internet for travel purposes in London at least once a day

Frequency of internet usage (online Londoners)

<table>
<thead>
<tr>
<th>Frequency of Use</th>
<th>Autumn 15</th>
<th>Autumn 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Several times a day</td>
<td>91%</td>
<td>92%</td>
</tr>
<tr>
<td>Once a day</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Up to three or four times a week</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Up to three or four times a month</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>About once a month</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Less than once a month</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Any use of the internet (99% use daily)

Use for travel purposes in London (38% use daily)

= Significant increase vs. Autumn 15 at a 95% confidence level
= Significant decrease vs. Autumn 15 at a 95% confidence level

I1: How often do you access the internet in each of these places? I6. How often do you access the internet in relation to travel in London?
Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017)
The 16-34s, men, ABC1s, inner Londoners, workers and those travelling for business, continue to access London travel information online more frequently.

Internet in relation to travel in London (% using at least once a day):

Demographic pattern

- Men 41%
- Women 35%
- 16-34 57%
- 35-54 34%
- 55+ 12%

- ABC1 41%
- C2DE 29%
- Inner London 46%
- Outer London = 32%
- Working 48%
- Not working 21%

Weekly:
- Business travellers = 67%
- Commuters = 53%
- Personal business = 45%
- Leisure = 45%

= Significant increase vs. Autumn 15 at a 95% confidence level

= Significant decrease vs. Autumn 15 at a 95% confidence level

Base: Men (538); Women (654); 16-34 (385); 35-54 (476); 55+ (331); ABC1 (858); C2DE (334); Working (783); Not working (409); Inner (428); Outer (764); Once a week: Commute (736); Business travellers (320); Personal business (722); Leisure (795); Disabled (243); Non-disabled (928)
A range of London travel activities were carried out online, including looking up routes, times and getting live travel information and service updates.

Activities in relation to travel on the internet (all using the internet for travel purposes)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Autumn 15</th>
<th>Spring 16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewing maps</td>
<td>55%</td>
<td>56%</td>
</tr>
<tr>
<td>Checking the best route</td>
<td>54%</td>
<td>56%</td>
</tr>
<tr>
<td>Checking journey time</td>
<td>50%</td>
<td>53%</td>
</tr>
<tr>
<td>Check bus times</td>
<td>48%</td>
<td>50%</td>
</tr>
<tr>
<td>Live travel information / service</td>
<td>55%</td>
<td>56%</td>
</tr>
<tr>
<td>updates</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Check train times (not Tube)</td>
<td>48%</td>
<td>50%</td>
</tr>
<tr>
<td>Information about fares and tickets</td>
<td>34%</td>
<td>32%</td>
</tr>
<tr>
<td>Information about roads or driving</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>Check your Oyster balance</td>
<td>23%</td>
<td>21%</td>
</tr>
<tr>
<td>Buying tickets</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>Topping up your Oyster card</td>
<td>23%</td>
<td>17%</td>
</tr>
<tr>
<td>Information about Oyster</td>
<td>23%</td>
<td>16%</td>
</tr>
<tr>
<td>Keep track of how much you’re spending on travel</td>
<td>23%</td>
<td>13%</td>
</tr>
<tr>
<td>Information about cycling</td>
<td>23%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Note ‘not Tube’ added in Spring 16

17. Still thinking specifically about travelling in London, which of the following do you use the internet for? Base: All that use the internet for travel in London (Spring 16 n=1098; Autumn 15 n=917)

↑ = Significant increase vs. Autumn 15 at a 95% confidence level
↓ = Significant decrease vs. Autumn 15 at a 95% confidence level
Use of journey planning apps and social media
Over three quarters of online Londoners use apps and just under half use them for travel in London – in line with Autumn 15

App usage (online Londoners)

<table>
<thead>
<tr>
<th></th>
<th>Spring 2016</th>
<th>Autumn 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>77% used any apps</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>60% of app users</strong> used London travel apps</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>46% used London travel apps</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

As in Autumn 15, app usage was significantly higher among 16-34s

A1. Do you use any apps, either free or paid for? A3. Do you use specific apps in relation to travel in London?
Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017)
A5. Which of the following London Travel apps do you use?
Base: Travel app users (n=530)

Google maps remained the most used travel app – Tube Map was used by nearly a third of travel app users

Top ten London travel apps used in Spring 2016 (travel app users)

- Google Maps: 53%
- Tube map-London Underground: 31%
- Citymapper: Bus, Tube, Rail: 23%
- London Bus Live Countdown: 22%
- London Oyster Balance: 15%
- London Bus Checker Free: Times: 15%
- London Live Bus Countdown: 12%
- Bus London Live Bus Time: 11%
- London Transport Planner: 11%
- London Travel: 10%
Google maps was the most used travel app – usage for the majority of apps remained in line with Autumn 15

All travel apps used (travel app users)

A5. Which of the following London Travel apps do you use?
Base: Travel app users (Spring 16 n=530; Autumn 15 n=463)

- Google Maps: 53% (Spring 16) vs. 53% (Autumn 15)
- Tube map- London Underground: 32% (Spring 16) vs. 31% (Autumn 15)
- Citymapper: Bus, Tube, Rail: 23% (Spring 16) vs. 23% (Autumn 15)
- London Bus Live Countdown: 26% (Spring 16) vs. 22% (Autumn 15)
- London Oyster Balance: 18% (Spring 16) vs. 15% (Autumn 15)
- London Bus Checker Free: Times: 16% (Spring 16) vs. 15% (Autumn 15)
- London Live Bus Countdown: 13% (Spring 16) vs. 12% (Autumn 15)
- Bus London Live Bus Time: 15% (Spring 16) vs. 11% (Autumn 15)
- London Transport Planner: 13% (Spring 16) vs. 11% (Autumn 15)
- London Travel: 12% (Spring 16) vs. 10% (Autumn 15)
- Live London Bus Tracker: 11% (Spring 16) vs. 12% (Autumn 15)
- UK Bus checker: 11% (Spring 16) vs. 7% (Autumn 15)
- Bus Countdown: 9% (Spring 16) vs. 7% (Autumn 15)
- Moovit: Bus, Rail & Tube Info: 9% (Spring 16) vs. 6% (Autumn 15)
- Pubtran London: 7% (Spring 16) vs. 6% (Autumn 15)
- TripGo, real trip planner: 7% (Spring 16) vs. 6% (Autumn 15)
- Bus Guru Live London Bus Times: 7% (Spring 16) vs. 5% (Autumn 15)
- UK Bus Time Live: Bus Scout: 6% (Spring 16) vs. 5% (Autumn 15)
- Transit App: 6% (Spring 16) vs. 3% (Autumn 15)
- Offi - Public Transport Buddy: 4% (Spring 16) vs. 3% (Autumn 15)
- National Rail: 1% (Spring 16) vs. 1% (Autumn 15)
- Trainline: 1% (Spring 16) vs. 0% (Autumn 15)
- Tube Exits: 0% (Spring 16) vs. 0% (Autumn 15)
- Other: 5% (Spring 16) vs. 2% (Autumn 15)

↑ = Significant increase vs. Autumn 15 at a 95% confidence level
↓ = Significant decrease vs. Autumn 15 at a 95% confidence level
Travel apps often fulfil a range of specific journey planning needs such as checking times, maps and routes.

Activities in relation to London travel (travel app users)

As in Autumn 15, almost all travel related activities were carried out less on apps than the internet in general.

A4. Which of the following do you use your London Travel Apps for?

Base: Travel app users (Spring 2016 n=530; Autumn 15 n=463)

- Check bus times: Autumn 15 55%, Spring 16 52%
- Checking the best route: Autumn 15 42%, Spring 16 43%
- Viewing maps: Autumn 15 48%, Spring 16 42%
- Checking journey time: Autumn 15 40%, Spring 16 40%
- Live travel information / service updates: Autumn 15 37%, Spring 16 38%
- Check tube times: Autumn 15 33%, Spring 16 33%
- Check train times (not Tube): Autumn 15 38%, Spring 16 33%
- Information about planned works or closures: Autumn 15 20%, Spring 16 19%
- Information about roads or driving: Autumn 15 16%, Spring 16 17%
- Check your Oyster balance: Autumn 15 16%, Spring 16 17%
- Information about fares and tickets: Autumn 15 19%, Spring 16 16%
- Buying tickets: Autumn 15 16%, Spring 16 14%
- Information about Oyster: Autumn 15 16%, Spring 16 12%
- Topping up your Oyster card: Autumn 15 12%, Spring 16 11%
- Keep track of how much you’re spending on travel: Autumn 15 11%, Spring 16 10%
- Information about cycling: Autumn 15 11%, Spring 16 8%

Note ‘not Tube’ added in Spring 16

As in Autumn 15, almost all travel related activities were carried out less on apps than the internet in general.

↑ = Significant increase vs. Autumn 15 at a 95% confidence level
↓ = Significant decrease vs. Autumn 15 at a 95% confidence level
The majority of online Londoners used at least one social media site/app – one in five used social media for London travel information

Social media usage (online Londoners)

Used any social media
89%

Used any social media regularly
87%

Used any social media for London travel information
20%

Figures include YouTube which TfL recognise is not strictly social media

SM1ai. How often do you use each of the following social media sites/apps? SM1. Which of these do you regularly use? SM2. Do you ever use social media for London travel information?
Base: All respondents (Spring 16 n=1192)
‘Regular’ social media usage increased in Spring 16, although use for travel information was lower

Social media usage (online Londoners)

Spring 2016

87% use any social media regularly

23% of social media users use it for London travel information

20% used social media for London travel information

Autumn 2015

82% used any social media regularly

29% of social media users use it for London travel information

24% used social media for London travel information

Please note, this question was asked to ‘all’ social media users instead of ‘regular’ social media users in Spring 2016

Figures include YouTube which TfL recognise is not strictly social media

SM1. Which of these do you regularly use? SM2. Do you ever use social media for London travel information?

Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017)
Use of Facebook and YouTube was highest – Twitter, Google+ and LinkedIn were used by over 40 per cent of online Londoners

Social media use - Spring 2016 (online Londoners)

<table>
<thead>
<tr>
<th>Social Media</th>
<th>Usage</th>
<th>Weekly Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>80%</td>
<td>73%</td>
</tr>
<tr>
<td>YouTube</td>
<td>80%</td>
<td>68%</td>
</tr>
<tr>
<td>Twitter</td>
<td>47%</td>
<td>37%</td>
</tr>
<tr>
<td>Google+</td>
<td>44%</td>
<td>31%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>43%</td>
<td>29%</td>
</tr>
<tr>
<td>Instagram</td>
<td>37%</td>
<td>31%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>31%</td>
<td>22%</td>
</tr>
<tr>
<td>Snapchat</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>Tumblr</td>
<td>23%</td>
<td>15%</td>
</tr>
</tbody>
</table>

* TfL recognise that You Tube is not strictly social media

*SMai. How often do you use each of the following social media sites/ apps? Base: All respondents (Spring 16 n=1192)
Social media was used for a range of purposes, particularly entertainment, keeping in touch with family/friends and networking.

**Purpose of social media usage (users of each social media)**

<table>
<thead>
<tr>
<th>Social Media</th>
<th>Purpose</th>
<th>Percentage</th>
<th>Base (Autumn 15)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Facebook</strong></td>
<td>Contacting family/friends</td>
<td>78%</td>
<td>80%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>53%</td>
<td>55%</td>
</tr>
<tr>
<td></td>
<td>News/information</td>
<td>30%</td>
<td>35%</td>
</tr>
<tr>
<td><strong>Twitter</strong></td>
<td>News/information</td>
<td>37%</td>
<td>47%</td>
</tr>
<tr>
<td></td>
<td>Entertainment</td>
<td>34%</td>
<td>42%</td>
</tr>
<tr>
<td></td>
<td>Contact family/friends</td>
<td>34%</td>
<td>35%</td>
</tr>
<tr>
<td><strong>YouTube</strong></td>
<td>Entertainment</td>
<td>78%</td>
<td>81%</td>
</tr>
<tr>
<td></td>
<td>News/information</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td>Customer service</td>
<td>12%</td>
<td>14%</td>
</tr>
</tbody>
</table>

*Please note, the base for this question changed to ‘all’ social media users from ‘regular’ social media users in Spring 2016.*

TfL recognise that YouTube is not strictly social media.
Facebook and Twitter were most used for travel in London – as seen in Autumn 15, a higher proportion of Twitter’s users used it for travel in London

Social media used for travel in London Spring 2016 (online Londoners)

<table>
<thead>
<tr>
<th>Platform</th>
<th>Percentage (of all users)</th>
<th>Percentage among specific users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>14% (18% of all users)</td>
<td></td>
</tr>
<tr>
<td>Twitter</td>
<td>13% (28% of all users)</td>
<td></td>
</tr>
<tr>
<td>Google+</td>
<td>8% (19% of all users)</td>
<td></td>
</tr>
<tr>
<td>YouTube</td>
<td>8% (10% of all users)</td>
<td></td>
</tr>
<tr>
<td>LinkedIn</td>
<td>6% (14% of all users)</td>
<td></td>
</tr>
<tr>
<td>Instagram</td>
<td>6% (16% of all users)</td>
<td></td>
</tr>
<tr>
<td>Snapchat</td>
<td>5% (16% of all users)</td>
<td></td>
</tr>
<tr>
<td>Pinterest</td>
<td>4% (13% of all users)</td>
<td></td>
</tr>
<tr>
<td>Tumblr</td>
<td>3% (15% of all users)</td>
<td></td>
</tr>
</tbody>
</table>

* TFL recognise that You Tube is not strictly social media

Data in brackets showing the percentage using each site/app for travel purposes among respective users of each site/app

SM2B Which of these do you use for London travel information?
Base: All respondents (Spring 16 n=1192)
As seen in Autumn 15, younger online Londoners used social media more often, including across the most used social media sites/ apps.

Social Media regularly used (online Londoners)

<table>
<thead>
<tr>
<th></th>
<th>Regularly use any social media</th>
<th>Facebook</th>
<th>YouTube*</th>
<th>Twitter</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Spring 16</td>
<td>Autumn 15</td>
<td>Spring 16</td>
<td>Autumn 15</td>
</tr>
<tr>
<td>16-34</td>
<td>98%↑</td>
<td>95%</td>
<td>80%↓</td>
<td>88%</td>
</tr>
<tr>
<td>35-54</td>
<td>88%↑</td>
<td>83%</td>
<td>72%</td>
<td>75%</td>
</tr>
<tr>
<td>55+</td>
<td>66%↑</td>
<td>58%</td>
<td>54%</td>
<td>55%</td>
</tr>
</tbody>
</table>

* TfL recognise that You Tube is not strictly social media

SMT: Which of these do you regularly use?
Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017)

↑ = Significant increase vs. Autumn 15 at a 95% confidence level
↓ = Significant decrease vs. Autumn 15 at a 95% confidence level
Half of Twitter users followed at least one TfL feed – the general TfL feed and Tube line feeds were most followed

Twitter feed usage (all Twitter users)

50% of London based Twitter users follow at least one TfL Twitter feed

Most used TfL feeds (all Twitter users)

- Transport for London @TfL = 27%
- Any Tube line feed = 24%
- TfL Bus Alerts @TfLBusAlerts = 16%
- TfL Travel Alerts @TfLTravelAlerts = 14%
- TfL Traffic News @TfLTrafficNews = 11%

Follow any TfL Twitter feed by age:
- 16-34 (56%)
- 35-54 (49%)
- 55+ (21%)

Please note, this was a new question in Spring 2016

RT3. You told us earlier that you use Twitter. Do you follow any of the below TfL Twitter feeds?
Base: All Twitter users (Spring 16 n=540)
TfL website
TfL’s website is a major source of London travel information, used by nine in ten online Londoners and almost all those that used the internet for travel in London.

Website usage (online Londoners)

96% of those that use the internet for travel in London, use the TfL website

95% (94% in Autumn 15) Used the internet in relation to travel

91% (88% in Autumn 15) Used the TfL website

61% (60% in Autumn 15) Access the TfL website through a mobile device

67% of TfL website users access through a mobile device

16. How often do you access the internet in relation to travel in London?; 19. How often do you use the TfL website?; 112b. How often do you access the TfL website on a mobile device?
Base: All respondents (Spring 16 n=1192; Autumn 15 n=1017)
Use of the TfL website among online Londoners significantly increased from Autumn 15

Frequency of usage of the TfL website (online Londoners)

- **Ever use - Telephone**
- **Use Daily - Telephone**
- **Ever use - Online**
- **Use Daily - Online**

**Parallel run:** Online and Telephone

**Online only**

- 2010: 5%
- 2011: 5%
- Jan-12: 6%
- Autumn 12: 10%
- Spring 13: 10%
- Autumn 13: 10%
- Spring 14: 11%
- Autumn 14: 9%
- Spring 15: 12%
- Autumn 15: 24%
- Spring 16: 24%

**Telephone only**

- 2010: 68%
- 2011: 75%
- Jan-12: 74%
- Autumn 12: 77%
- Spring 13: 77%
- Autumn 13: 76%
- Spring 14: 76%
- Autumn 14: 81%
- Spring 15: 76%
- Autumn 15: 88%
- Spring 16: 91%

= Significant increase vs. Autumn 15 at a 95% confidence level

= Significant decrease vs. Autumn 15 at a 95% confidence level

19. How often do you use the TfL website?
Base: Spring 2016; all respondents (n=1192); All other waves (circa, n=1000+)
As in Autumn 15, a range of groups were more likely to have used the TfL website, notably under 55s, although their use increased wave on wave.

Frequency of usage of the TfL website (online Londoners)

<table>
<thead>
<tr>
<th>Group</th>
<th>Percentage</th>
<th>Confidence Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>16 – 34 (n=385)</td>
<td>95%</td>
<td></td>
</tr>
<tr>
<td>ABC1 (n=858)</td>
<td>94%</td>
<td></td>
</tr>
<tr>
<td>Inner London (n=428)</td>
<td>94%</td>
<td></td>
</tr>
<tr>
<td>Working (n=783)</td>
<td>95%</td>
<td></td>
</tr>
<tr>
<td>35 – 54 (n=476)</td>
<td>92%</td>
<td></td>
</tr>
<tr>
<td>C2DE (n=334)</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Outer London (n=764)</td>
<td>89%</td>
<td></td>
</tr>
<tr>
<td>Not Working (n=409)</td>
<td>84%</td>
<td></td>
</tr>
<tr>
<td>55+ (n=331)</td>
<td>84%</td>
<td>Significant increase vs. Autumn 15 at a 95% confidence level</td>
</tr>
</tbody>
</table>

Please note, weekly Tram, DLR and Overground users in our sample were also more likely to be under 35.
TfL's website was used for a range of purposes, in particular checking routes, live travel information, times and information about planned works or closures.

Activities carried out on TfL’s website (TfL website users)

- Checking bus times
- Checking the best route
- Live travel information
- Checking train times (not Tube)
- Checking journey times
- Checking Tube times
- Information about planned works/closures
- Viewing maps
- Information about fares and tickets
- Information about roads or driving
- Topping up your Oyster card
- Keep track of spend on travel
- Buying tickets
- Information about Oyster
- Check your Oyster balance

Oyster and ticket related activity have significantly decreased since Autumn 15, possibly related to a rise in contactless usage?

(Note 'not Tube' added in Spring 16)

Base: TfL website users (Spring 2016 n=1080; Autumn 2015 n=896)

111. Which of the following do you use/have you used the TfL website for?

- Significant increase vs. Autumn 15 at a 95% confidence level
- Significant decrease vs. Autumn 15 at a 95% confidence level
 TfL's website was used more than other sites for checking tube times, information about planned closures and live travel information but used less for viewing maps in particular

Travel activities carried out on the internet (TfL website users and those using internet for travel)

11. Which of the following do you use/ have you used the TfL website for?
   Base: TfL website users (Spring 2016 n=1080); Those using the internet in relation to travel in London (n=1098)

   = Significant increase vs. internet in general at a 95% confidence level
   = Significant decrease vs. internet in general at a 95% confidence level

Note ‘not Tube’ added in Spring 16
Experience of the TfL website remains positive, with 19 out of every 20 website users rating it above average or higher.

Experience of the TfL website (TfL website users)

The KPI score from online data remained in line with the previous wave, therefore we have extrapolated the result of the telephone score from the previous telephone wave (Spring 15).

110a: Please rate your experience of the TfL website overall...
Base: All respondents who have used the TfL website (Spring 2016 n=1080; Autumn 2015 n= 896; Spring 2015 n=684; Autumn 2014 n=721; Spring 2014 n=691; Autumn 2013 n=684; Spring 2013 n=707)
Mean satisfaction remained in line with Autumn 2015, with a mean percentage of 72 per cent.

**Mean satisfaction with the TfL website (TfL website users) – new scale**

<table>
<thead>
<tr>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>72%</td>
</tr>
</tbody>
</table>

Mean satisfaction score – converted to a score out of 100 from a mean score out of 10.

**I10b. Thinking of the TfL website overall, how satisfied are you with?**
Base: TfL website users (Spring 2016 n=1080; Autumn 2015 n=896)
And mean satisfaction across different devices also remained in line with Autumn 15.

**Mean satisfaction with the TfL website (TfL website users) – new scale**

<table>
<thead>
<tr>
<th>Device</th>
<th>Autumn 15</th>
<th>Spring 16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laptop</td>
<td>75%</td>
<td>75%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>72%</td>
<td>75%</td>
</tr>
<tr>
<td>Tablet</td>
<td>73%</td>
<td>76%</td>
</tr>
</tbody>
</table>

110b. Thinking of the TfL website overall, how satisfied are you with?; 113. how satisfied are you with the TfL website through each of these devices?

Base: TfL website users (Spring 2016 n=1080; Autumn 2015 n=896)
One quarter were ‘very satisfied’ with the TfL website – high level satisfaction (9-10 out of 10) through a tablet significantly increased

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>9 or 10</td>
<td>24%</td>
<td>32%</td>
<td>27%</td>
<td>33%</td>
</tr>
<tr>
<td>7 or 8</td>
<td>48%</td>
<td>44%</td>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>0 to 6</td>
<td>28%</td>
<td>24%</td>
<td>29%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Mean satisfaction score – converted to a score out of 100 from a mean score out of 10

= Significant increase vs. Autumn 15 at a 95% confidence level

Over 55’s were most likely to be highly satisfied (9-10/10) on a desktop/laptop but 16-34’s were most likely through a tablet

Base: TfL website users (Spring 2016 n=1080);
Information provided, tools and ease of use were the key triggers for high or low satisfaction with the TfL website

Reason for TfL website satisfaction rating (TfL website users)

Satisfaction rating 7-10 (72%)

- **Information**
  - Detailed/ good/ up to date information: 27%
- **Tools**
  - Good website/ good tools: 17%
- **Usability**
  - Easy to use/ user friendly/ simple: 17%

Satisfaction rating 0-6 (28%)

- **Information**
  - Poor information/ inaccurate/ lacks detail/ not up to date: 12%
- **Usability**
  - Not easy to use/ too complicated / not user friendly: 11%
- **General**
  - Average/ could be better/ room for improvement: 10%

Please note, this was a new question in Spring 2016

110c. You rated your satisfaction with the TfL website as [...] out of 10. Please explain your reason for this rating, in as much detail possible.

Base: TfL website users (Spring 2016 n=1080; 7-10 n=780; 0-6 n=300)
In particular, the availability and accuracy of information and website navigation were key to website satisfaction,

Reason for TfL website satisfaction rating (TfL website users)

<table>
<thead>
<tr>
<th>Satisfaction rating 7-10 (72%)</th>
<th>Satisfaction rating 0-6 (28%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;It's very detailed, easy to use and clear but sometimes there are disruptions which are not reflected on the website.&quot; [Female, 16-24]</td>
<td>&quot;The journey planner misses too much out and won’t allow you to have two screens open. It’s a job trying to find oyster info. like fare details for &quot; [Male, 55-64]</td>
</tr>
<tr>
<td>&quot;I can always get the information I am looking for I do not know how we managed before&quot; [Female, 70-74]</td>
<td>&quot;Broken links, searches going nowhere, impossible to find the information you want &quot; [Male, 35-44]</td>
</tr>
<tr>
<td>&quot;Nice and easy to use with clear fonts&quot; [Male, 45-54]</td>
<td>&quot;The new journey planner is rubbish. the times displayed for Tube departures are often incorrect&quot; [Female, 25-34]</td>
</tr>
<tr>
<td>&quot;It is generally very good for planning journeys&quot; [Female, 35-44]</td>
<td>&quot;Bus times are unreliable&quot; [Male, 45-54]</td>
</tr>
</tbody>
</table>

Please note, this was a new question in Spring 2016

I10c. You rated your satisfaction with the TfL website as [...] out of 10. Please explain your reason for this rating, in as much detail possible.

Base: TfL website users (Spring 2016 n=1080; 7-10 n=780; 0-6 n=300)
The TfL website was mainly accessed through a PC/ laptop, however six out of ten TfL website users accessed the site via a smartphone.

As in Autumn 15, on average the TfL website is accessed on fewer devices (1.9 devices, compared to 3.2 for the internet in general).

<table>
<thead>
<tr>
<th>Devices used to access the TfL website (TfL website users)</th>
<th>Autumn 15</th>
<th>Spring 16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop PC or laptop</td>
<td>85%</td>
<td>81%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>60%</td>
<td>58%</td>
</tr>
<tr>
<td>Tablet</td>
<td>37%</td>
<td>34%</td>
</tr>
<tr>
<td>Smart TV</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Standard mobile phone</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Games console</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>A wearable device</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

112a. Which of the following devices do you use to access the TfL website?
Base: TfL website users (Spring 2016 n=1080; Autumn 2015 n=896)
Other TfL sources
The majority had seen the various digital displays when travelling, particularly Tube countdown display and bus countdown timers

### Live digital displays (online Londoners)

<table>
<thead>
<tr>
<th>Display Type</th>
<th>Ever seen</th>
<th>Regularly use</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bus Countdown display</strong></td>
<td>79%</td>
<td>66%</td>
</tr>
<tr>
<td><strong>Tube Countdown display</strong></td>
<td>81%</td>
<td>59%</td>
</tr>
<tr>
<td><strong>Next stop display</strong></td>
<td>70%</td>
<td>47%</td>
</tr>
<tr>
<td><strong>Electronic displays in Tube stations</strong></td>
<td>57%</td>
<td>30%</td>
</tr>
</tbody>
</table>

#### Use regularly by age

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Ever seen</th>
<th>Regularly use</th>
</tr>
</thead>
<tbody>
<tr>
<td>16 – 34</td>
<td>63%</td>
<td>68%</td>
</tr>
<tr>
<td>35 – 54</td>
<td>61%</td>
<td>46%</td>
</tr>
<tr>
<td>55+</td>
<td>59%</td>
<td>43%</td>
</tr>
</tbody>
</table>

Please note: Figures are based on all online Londoners and use of each mode of transport varies by age and so this should be considered when looking at this data.

F1. Which of the following have you ever seen when travelling in London?
F2. Which do you regularly use to help plan your journey when travelling in London?

Base: Total sample Spring 16 (n=1192)
Again a number of other TfL sources were used for obtaining travel information in London, in particular staff

Other TfL sources of information used (online Londoners)

Sources used for real-time travel information

49% ever use staff when travelling (54% in Autumn 15)

20% ever use TfL’s Twitter feed when travelling (21% in Autumn 15)

Email

Over half (53%) have received a TfL email with travel related information (55% in Autumn 15)

Majority (93%) find these emails useful (91% in Autumn 15)
Older Londoners were again using more traditional formats such as announcements, displays and staff more.

Other TfL sources of information used (online Londoners):

Older Londoners were reliant on announcements/ displays and staff while travelling (*Use real-time travel information*):

**Announcements/ displays:**
- 16-34 = 42% (47% in Autumn 15)
- 35-54 = 57% (59% in Autumn 15)
- 55+ = 74% (70% in Autumn 15)

**Staff:**
- 16-34 = 27% (41% in Autumn 15)
- 35-54 = 42% (42% in Autumn 15)
- 55+ = 49% (51% in Autumn 15)

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RT2. Thinking about the various means of obtaining information about problems or delays encountered during your journey in London, which of these do you use...?

Base: All accessing real-time travel information (16-34 n=352; 35-54 n=403; 55+ n=288)
Appendix
Satisfaction ratings compare well at the end of the scales, however reasonable overlap exists around the ‘average’

Each line represents the % giving each score on the satisfaction question based on their score from the experience question e.g. 69% of those rating ‘very poor’ rated ‘0’ at the satisfaction question.
Thank you