

Digital Media Research

**April 2011
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Synopsis

Access to Digital technology:

- 90% owned a mobile, 89% a digital TV while 69% had Internet access.
- Mobile phone, digital TV and Internet ownership was at its highest amongst the under 44's and those from ABC1 backgrounds.
- Few elderly people had Internet access (27%, 65+).
- Rail users were more likely than bus and Metro users to have access to digital technology, particularly Internet access (75%).
- Non users of public transport had higher levels of access to digital technology than bus or Metro users.

Frequency of internet use:

- 54% used the internet at least daily, with an additional 12% using it weekly.
- Daily use was most common amongst the young (86%, 16-24) and ABC1 (71%) groups. Few over 65's (14%) and C2DE (39%) respondents accessed the Internet daily.
- Rail users (63%) and non public transport users (58%) were the most regular Internet users, followed by bus (52%) and Metro (47%) users.
- Regular Internet use was universally high amongst young bus (85%), rail (93%) and Metro (85%).

Location of internet access:

- 96% accessed the Internet at home, 29% at work and 14% at school/college/university. 6% accessed via wifi hotspots and 4% on the bus/train.
- Young (67%), ABC1 (64%), male (52%) respondents were most likely to access the internet in locations other than at home, with use of the internet at work and in wifi hotspots more common place amongst these groups.
- Rail users (60%) were more likely to access the Internet away from home than bus or metro users, particularly at work (34%) and while travelling (7%).

Devices used to access the internet:

- 95% accessed the Internet via a home PC/laptop. 38% used a works/school computer and 35% a mobile phone - 19% used a Smartphone and 16% an Internet enabled phone.
- Young (79%), male (69%) and ABC1 respondents (71%) were most likely to access the Internet using a range of devices. With work/school PC and Smartphone use being most common amongst these groups.
- Rail users (69%) were more likely than bus or Metro users to use a variety of devices to access the Internet, especially a works PC (47%) or a Smartphone (24%).

Internet connection and browser/search engine use:

- 98% used Broadband to access the Internet.
- Internet Explorer (40%) and Google Chrome (38%) were the most popular browsers.
- Google was the most commonly used search engine (93%).

Weekly use of online content:

- Weekly Internet use tended to be for general surfing (81%), emailing (70%) and social networking (60%).
- About half of weekly use was for finding information on products/services (54%) or information for work (52%).
- Weekly use was lower for Instant Messaging (37%) watching on line content, (28%), downloading (23%), banking (25%) and shopping (18%) - albeit 55% took part in this activity on a less than weekly basis.
- Making travel plans tended to be a 'less than weekly' activity (48%).
- Contributing online content was the least likely activity (77% never).
- 16-24 year olds were the most regular users of online content, the over 65's had the lowest usage levels. Men slightly outpaced women in all forms of use, while ABC1 use was more regular than C2DE.
- Rail users were the most regular users of all forms of online content.

Use of social networking sites:

- 41% used Facebook, 21% used YouTube and 6% Twitter.
- Younger respondents were the most regular users of social networking sites especially Facebook (83%, weekly).
- Few respondents over the age of 44 used social network sites, this was particularly the case for the over 65's (6%)
- Rail users were the biggest users of social networking sites, while use of Facebook was universally high amongst young public transport users (83%, bus; 87%, rail; 83% Metro).
- An additional 20% of 16-24 year old rail users used Twitter.

Mobile phone used:

- 51% of respondents had a standard mobile (text and calls only), 25% a Smartphone and 14% a mobile with internet access.
- Respondents under 44 (52%, 16-24; 34%, 25-44) and to a lesser extent from ABC1 groups (28%) were most likely to have a Smartphone. Few elderly respondents did so (1%).
- Rail users (31%) and non users of public transport (30%) were most likely to own a Smartphone.
- 94% used mobiles to make calls and 86% to text.

- 31% used mobiles to access Internet and 22% for mobile Apps.
- Mobile internet and mobile Apps use was most common amongst young, ABC1 respondents.
- Rail users were more likely to use a mobile to access the Internet (39%) and download Apps (29%) than bus or Metro users.
- The most commonly used Apps were related to communications/social networks (60%) and games (57%).

Printed V digital information:

- Overall 36% preferred printed information, 33% to talk to someone and 30% online.
- Younger respondents (51%) and those in ABC1 (39%) groups were most likely to prefer information online.
- Older respondents were most likely to want printed information (47%) or to talk to someone (50%).
- Overall the most common preference in bus, rail and Metro markets was for printed information, albeit amongst rail users this preference was at the same level as that for online information (38%, each).
- The youthful elements of the bus, rail and Metro markets all preferred information online, in contrast the over 44's preferred printed information or to talk to someone.

Key Findings – Bus User market

	Total	16-24	25-44	45-59	60-64	65+	Male	Female	ABC1	C2DE
Access to the following:										
Internet	67	93	80	69	48	25	67	67	81	55
Mobile phone	89	97	98	93	82	66	87	90	92	86
Digital TV	86	91	87	86	80	80	85	86	89	83
None of the above	3	1	1	2	3	10	4	2	1	4
Daily/weekly internet use:										
Daily+ internet use	52	85	65	43	32	14	55	49	68	40
Weekly internet	12	7	13	21	11	10	10	14	12	13
Mobile phone type:										
Standard mobile	52	31	49	63	72	62	49	54	47	56
Smartphone	22	50	26	13	3	1	24	21	31	15
Mobile phone with Internet access	15	17	23	17	7	3	15	15	15	15
Mobile Internet/App use:										
Mobile Internet access use	30	60	39	22	6	2	33	28	39	23
App use	21	46	28	8	2	1	24	18	27	16
Bluetooth use	32	52	45	27	7	3	33	31	35	30
Preference for information:										
Printed in leaflet/poster	37	21	37	43	43	47	35	39	36	38
Online	29	52	34	23	20	9	33	27	39	22
Talk to someone	35	24	28	38	40	51	32	37	32	37
Text alerts	12	23	14	9	5	1	11	12	10	13
Email	8	8	14	8	5	2	10	7	11	6
Media (TV/Papers etc)	4	1	4	3	5	8	4	4	4	4
Social network use (weekly):										
facebook	41	83	53	24	7	6	41	41	49	35
Twitter	6	13	7	2	1	0	6	5	8	4
You Tube	22	52	28	8	1	1	26	19	26	19
Base (Weighted)	1480	339	445	263	107	327	649	832	648	833

Key Findings – Rail User market

	Total	16-24	25-44	45-59	60-64	65+	Male	Female	ABC1	C2DE
Access to the following:										
Internet	75	97	87	80	61	40	75	76	86	60
Mobile phone	93	100	99	97	85	76	91	94	94	91
Digital TV	90	92	89	92	80	91	88	91	89	91
None of the above	1	0	1	0	2	2	1	1	1	1
Daily/weekly internet use:										
Daily + access	63	93	78	59	41	22	67	59	77	43
Weekly + access	11	2	8	22	17	16	8	15	9	14
Mobile phone type:										
Standard mobile (calls and texts only)	47	21	38	53	78	70	44	50	41	55
Smartphone	31	62	41	25	2	2	34	29	40	19
Mobile phone with Internet access	15	16	21	19	5	5	14	16	13	17
Mobile Internet/App use:										
Mobile Internet use	39	70	57	29	7	4	42	37	47	29
App use	29	57	40	15	5	2	34	24	36	20
Bluetooth use	33	48	47	36	12	6	38	29	37	28
Preference for information:										
Printed in leaflet/poster	38	26	27	49	54	49	37	38	33	44
Online	38	52	46	31	31	19	41	34	47	24
Talk to someone	33	21	28	34	34	49	28	38	27	41
Text alerts	9	18	12	6	0	1	11	7	10	8
Email	12	10	19	12	8	4	12	11	15	6
Media (TV/Papers etc)	5	5	3	5	9	5	5	4	4	5
Social network use (weekly):										
Facebook	46	87	57	31	10	14	47	44	51	39
Twitter	9	20	10	6	2	1	9	9	11	6
YouTube	25	57	31	12	2	3	31	17	28	20
Base (Weighted)	556	122	173	95	41	125	291	266	327	229

Key Findings – Metro User Market

	Total	16-24	25-44	45-59	60-64	65+	Male	Female	ABC1	C2DE
Access to the following:										
Internet	64	96	82	75	52	28	61	66	80	52
Mobile phone	86	98	97	94	79	66	84	87	92	81
Digital TV	89	94	93	85	76	87	89	89	90	88
None of the above	3	2	1	2	0	6	2	3	1	5
Daily/weekly internet use:										
Daily + Internet use	47	85	72	31	34	19	49	47	63	36
Weekly + Internet use	15	13	9	40	10	11	12	18	17	13
Mobile phone type:										
Standard mobile	50	17	42	63	69	59	48	51	46	53
Smartphone	24	67	34	17	0	2	21	26	31	18
Mobile phone with Internet access	13	15	20	13	7	6	15	11	14	11
Mobile Internet/App use:										
Mobile Internet use	30	75	46	23	7	4	29	31	42	21
Mobile App use	23	63	38	17	0	2	24	22	33	16
Bluetooth use	33	69	52	29	10	5	30	35	39	28
Preference for information:										
Printed in leaflet/poster	42	34	36	50	58	44	42	43	41	44
Online	28	49	38	17	16	18	30	27	38	21
Talk to someone in person/via telephone	31	16	23	39	26	43	26	35	26	35
Text alerts	9	22	19	2	3	0	9	10	11	8
Email	7	6	18	5	6	0	9	6	7	8
Media (TV/Papers etc)	2	0	2	0	0	5	2	2	1	3
Social network use (weekly):										
Facebook weekly	37	83	51	29	10	13	38	35	41	34
Twitter weekly	8	21	14	6	3	0	9	8	11	6
YouTube weekly	20	60	33	6	0	0	23	16	23	18
Base (Weighted)	314	48	90	52	29	95	156	158	138	176

Key Findings - Non User Market

	Total	16-24	25-44	45-59	60-64	65+	Male	Female	ABC1	C2DE
Access to the following:										
Internet	74	89	87	73	70	36	71	78	85	59
Mobile phone	94	95	99	95	100	80	93	96	96	92
Digital TV	93	98	94	91	92	89	92	93	93	92
None of the above	2	0	1	1	0	6	2	1	1	2
Daily/weekly internet use:										
Daily + Internet use	58	84	71	58	51	14	57	59	74	35
Weekly + Internet use	14	5	15	9	15	21	12	16	8	20
Mobile phone type:										
Standard mobile	51	19	39	62	68	72	47	58	45	59
Smartphone	30	59	43	20	28	2	34	24	41	15
Mobile phone with Internet access	13	16	17	13	5	6	13	13	10	18
Mobile Internet/App use:										
Mobile Internet use	29	70	45	14	12	0	31	28	36	20
Mobile App use	16	33	25	8	4	0	17	14	22	8
Bluetooth use	37	55	45	36	25	10	39	34	42	29
Preference for information:										
Printed in leaflet/poster	29	15	27	28	25	44	24	36	25	34
Online	27	40	38	21	35	3	27	27	34	18
Talk to someone in person	32	27	22	33	46	49	29	35	30	34
Text alerts	9	10	12	10	0	3	7	11	8	10
Email	12	15	18	10	4	4	13	11	16	7
Media (TV/Papers etc)	9	4	6	8	15	17	12	3	5	13
Social network use (weekly):										
Facebook weekly	37	76	55	22	12	7	31	47	41	32
Twitter weekly	6	6	11	1	0	1	7	3	8	2
YouTube weekly	16	50	21	7	17	1	18	16	20	11
Base (Weighted)	407	38	156	125	20	68	252	155	234	172

1.0 INTRODUCTION

1.1 BACKGROUND TO RESEARCH

1.1.1 Centro recognises the importance of the emergence of digital media and is seeking to ascertain its relevance to its various customer segments and how it can be most effectively utilised in the future. The Marketing Team are producing a digital media strategy to embrace digital information and social media. In addition Centro is committed to providing the best level of passenger information possible and is investing £1.5 million in the creation of an Integrated Transport Knowledge Base which will help to deliver more timely information to customers digitally.

1.1.2 Centro currently makes a number of assumptions based on demographics as to how its customers interact with digital media. To improve this understanding the Marketing Team commissioned research into how our existing and potential customers currently interact with different forms of digital media.

1.2 RESEARCH OBJECTIVES

The research aimed to examine:

- i) Respondent profile in terms of age, gender, SEG and car ownership.
- ii) Frequency of travel by bus, train, Metro, car, cycle and on foot.
- iii) Access to the Internet, mobile phone, digital TV.
- iv) Where and how the internet is accessed.
- v) Frequency of internet use and type(s) of site used.
- vi) Use of social networking websites.
- vii) Awareness and subscription to RSS feeds.
- viii) Type of mobile phone use.
- ix) Use of mobile phone for calls, texts and internet.
- x) Use of mobile Apps.
- xi) Use of Bluetooth.
- xii) Awareness and use of QR codes.
- xiii) Preference for different passenger information formats.

2.0 **THE SURVEY**

2.1 **METHODOLOGY**

2.1.1 Research was commissioned amongst customers/potential customers looking at how they interact with a wide variety of digital media. To ensure a representative sample of the West Midlands conurbation quotas were set on the basis of age, social group and gender. In addition the final data set was weighted on the basis of district. Interviews were conducted on street via interviewer led questionnaire. For a copy of the questionnaire see **Appendix 1**.

2.1.2 Interviews were conducted on weekdays between the hours of 0800-1200hh and between 1200-1800hh and on Saturdays between 1000-1600hh.

Table 1

TARGET SAMPLE SIZE BY DISTRICT AND FINAL WEIGHTED SAMPLE

District	Sample target	Weighted	WM conurbation %
Birmingham	500	762	37
Coventry	260	247	12
Dudley	260	247	12
Sandwell	260	228	11
Solihull	260	165	8
Walsall	260	207	10
Wolverhampton	260	207	10
Weighted	2060	2062	100
Unweighted		2061	

3.0 **RESULTS**

3.1 **SAMPLE SIZE**

3.1.1 2061 interviews were conducted over the survey period. A sample of this size has a margin of error of +/- 2.2% at a 95% confidence level. One can therefore be 95% confident that the true answer lies within 2.2% of the survey findings.

3.2. **RESPONDENT PROFILE**

3.2.1 The survey was conducted to quota on the basis of age, gender and SEG and weighted by district; it is therefore broadly representative of the West Midlands population, **See Table 2 and Appendices 2a and 2b.**

- Respondents were fairly evenly split between male (48%) and female (52%)
- They were also evenly split between ABC1 social groups (49%) and C2DE (51%).
- There was a slight bias towards younger respondents (20% 16-24) with fewer from the 25-59 age groups (54%). 27% were aged 60 and over.
- Due to quotas placed on public transport users, respondents were less likely to own a car than figures for the conurbation would suggest. 43% of the sample had no car, while 57% were car owners.

Table 2

RESPONDENT PROFILE BY DISTRICT

	Total %	B'ham %	Cov %	Dudley %	Sand %	Sol %	Walsall %	W'ton %	WM %
16-24	20	18	23	18	15	18	24	27	17
25-59	54	57	47	56	57	51	49	49	56
65+	27	26	29	26	27	31	27	25	27
Male	48	49	43	49	49	48	48	49	49
Female	52	51	57	51	51	52	52	51	51
ABC1	49	51	49	43	47	58	46	46	52
C2DE	51	49	51	57	53	42	54	54	48
Car owners	57	56	48	52	54	79	62	53	66
No cars	43	44	52	48	46	21	38	48	34
Weighted	2062	762	247	247	228	165	207	207	

3.2.2 **Table 2** examines respondent profile by district, the following is of note.

- Coventry (23%), Walsall, (24%) and Wolverhampton (27%) had the highest proportion of younger respondents.
- Solihull (31%) had the highest proportion of elderly respondents aged 60+.

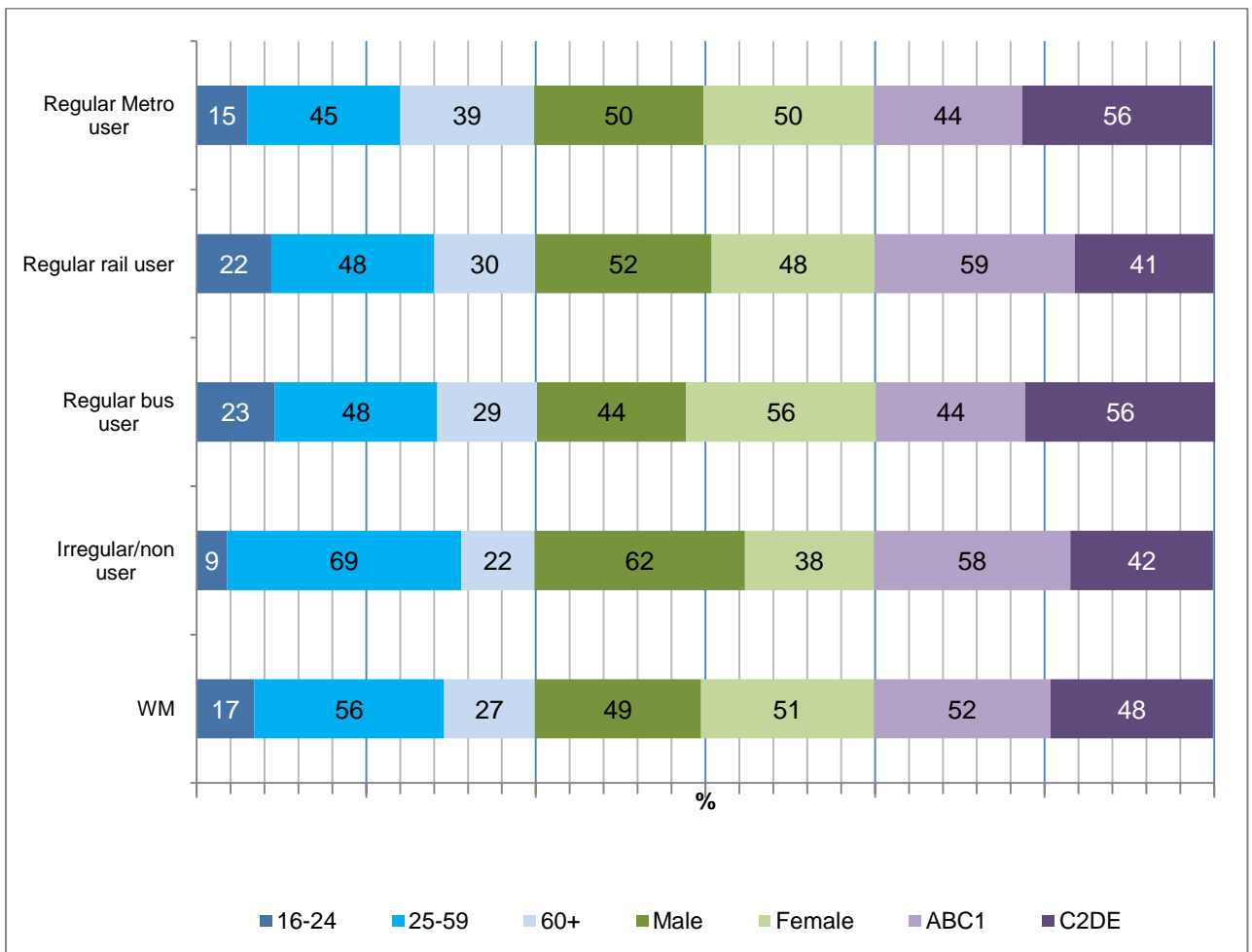
- With the exception of Coventry (57%, female) gender was fairly evenly split.
- The most affluent respondents were in Solihull (58%, ABC1) and Birmingham (51% ABC1), the least affluent in Dudley (43%).
- Car ownership was highest in Solihull (79%). It dipped to 52% in Dudley and 48% in Coventry.

3.3 MODES OF TRAVEL

3.3.1 **Public transport use:** 80% of the sample could be classified as public transport users, someone that travelled by bus, rail or Metro once a month or more. 20% were non users travelling by public transport less than monthly. Overall bus was the most widely used mode (72%) followed by train (27%) and Metro (15%). (The sampling frame was skewed towards Metro users in order to gain a statistically robust sample and is not representative of modal share for the West Midlands conurbation as a whole).

Figure 1

PROFILE OF PUBLIC TRANSPORT USERS



- 3.3.2 **Figure 1 and Appendices 3a to 3b** illustrates respondent profile by public transport use, the following is worth noting.
- Non public transport users were largely aged 25-59 (69%), male (62%) and from ABC1 backgrounds (58%), few younger respondents classified themselves as non users (9%, 16-24).
 - As is typical bus users tended to be female (56%), from C2DE groups (56%) and biased towards the young (23%) and elderly (29%).
 - Rail users tended to be male (52%) and from ABC1 (59%) backgrounds, use was also skewed towards younger (22%) and older groups (30%), albeit they were more likely than bus/Metro users to be aged 25-59.
 - Metro users were largely older (39%) and from C2DE back grounds (56%).

3.3.3 **Travel by other modes:**

- 60% were regular car users and 40% non users. Car use was highest amongst ABC1 respondents (71%) and lowest amongst the elderly (44%, 65+).
- 92% regularly made walking trips of over 5 minutes. Walking trips were by far the most common amongst the youngest group of respondents (63% daily).
- Just 9% travelled regularly by cycle. **See Appendices 3c to 3h.**

3.4 **ACCESS TO DIGITAL TECHNOLOGY**

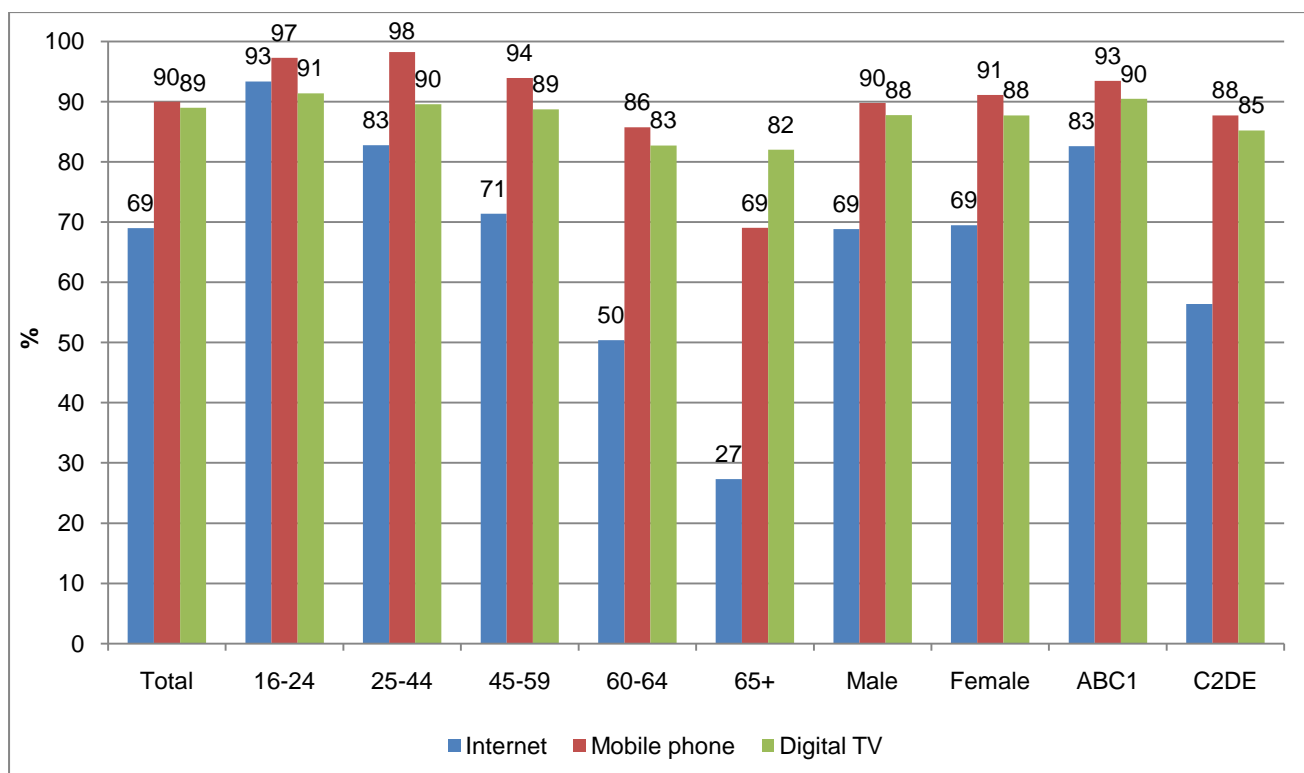
3.4.1 All respondents were asked if they had access to a mobile phone, the Internet or digital TV. **Figure 2** summarises this information while **Appendices 4a to 4b** provide further detail.

3.4.2 **Mobile Phone:**

- 90% owned a mobile phone, a figure on a par with data quoted in Ofcoms Annual Communications Market Report 2010 (89%).
- Mobile ownership was at its highest amongst younger respondents (97%, 16-24; 98% 25-44), and those from affluent ABC1 backgrounds (93%).
- Ownership only dipped below the 80% mark amongst the elderly (69%, 65+).
- There was no difference in mobile ownership on the basis of gender.
- Respondents in Solihull (96%), Birmingham and Coventry (92%) were most likely to have a mobile, those in Wolverhampton least likely (85%).

Figure 2

% ACCESS BY AGE, GENDER AND SEG



3.4.3

Digital TV

- 89% had digital TV a figure slightly below Ofcom national figures of 92% (albeit these figures are skewed upwards by including areas where respondents have no alternative to digital use).
- Digital TV ownership was highest amongst younger respondents (90% under 44) and those from ABC1 groups (90%).
- Those aged 65+ were least likely to have a digital TV, however at 82% this was the most widely owned form of digital technology amongst the elderly.
- There was no difference on the basis of gender (88%) equally.
- Respondents in Solihull (93%) and Birmingham (92%) were most likely to have a digital TV, ownership dipped to 81% in Wolverhampton.

3.4.4

Internet access:

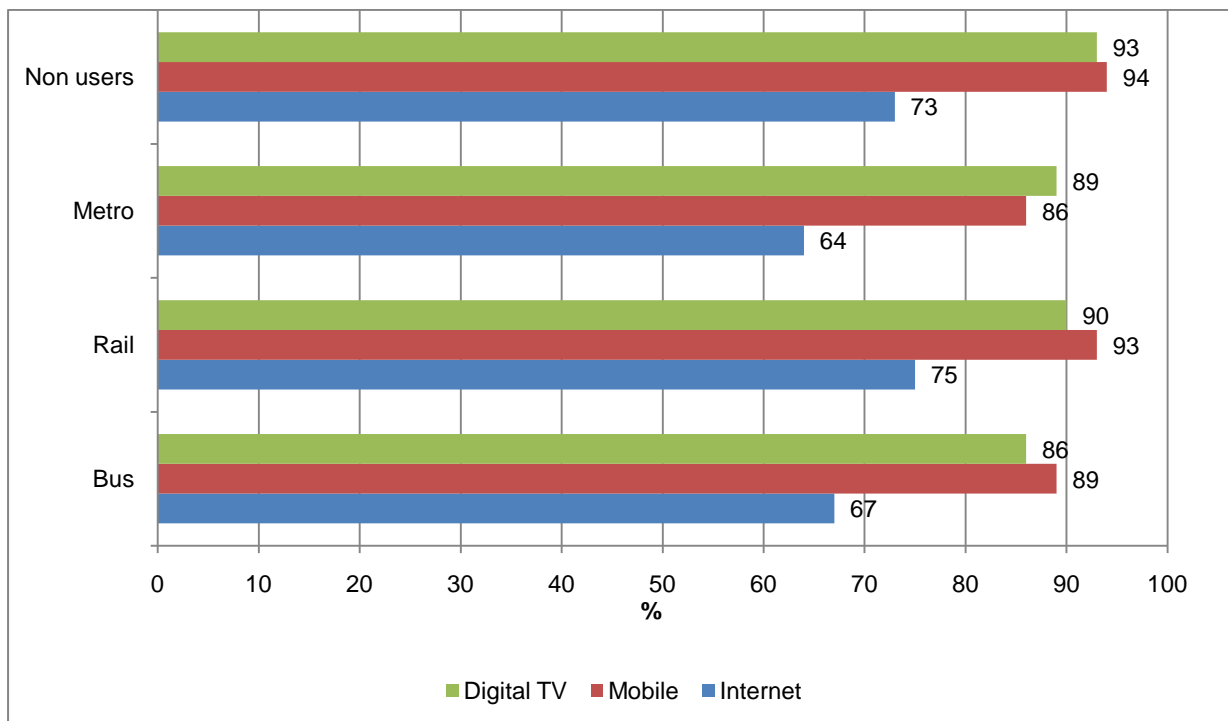
- 69% had Internet access, a figure slightly lower than that reported by Ofcom (73%).
- The under 44's were the most likely to have Internet access (with 93%, 16-24; 83%, 25-44; 71%, 45-59). Few elderly respondents had access (27%, 65+).

- ABC1 respondents (83%) were far more likely to have access than those in C2DE groups (56%).
- Access did not vary by gender (69%, each).
- Internet access was highest in Solihull (75%) and Birmingham (74%), lowest in Sandwell (62%).

3.4.5 **Ownership of digital technology by public transport use: Figure 3** and the key findings tables examine access to digital technology amongst users and non public transport users, **Appendix 4c** provide further detail.

Figure 3

DIGITAL OWNERSHIP BY PUBLIC TRANSPORT MARKET



- Non users had higher levels of access to Mobiles (94%) and digital TV (93%) and were more likely than bus and metro users to have Internet access (73%).
- Rail users were significantly more likely to have access to the Internet (75%) than bus (67%) and metro users (64%). They were also more likely to have a mobile (93%) and digital TV (90%).
- It is interesting to note that the youthful elements (16-24 year olds) of the bus, rail and Metro markets had high levels of ownership of all 3 forms of technology with ownership never dipping below 90%.

- Elderly bus users were least likely to have access to the internet (25%), mobiles (66%) or digital TV (80%). Albeit elderly rail users had higher levels of access (40% internet, 76% mobile; 91% digital TV).
- As one would expect ABC1 public transport users had higher levels of ownership than C2DE users, particularly in the Bus and Metro markets.

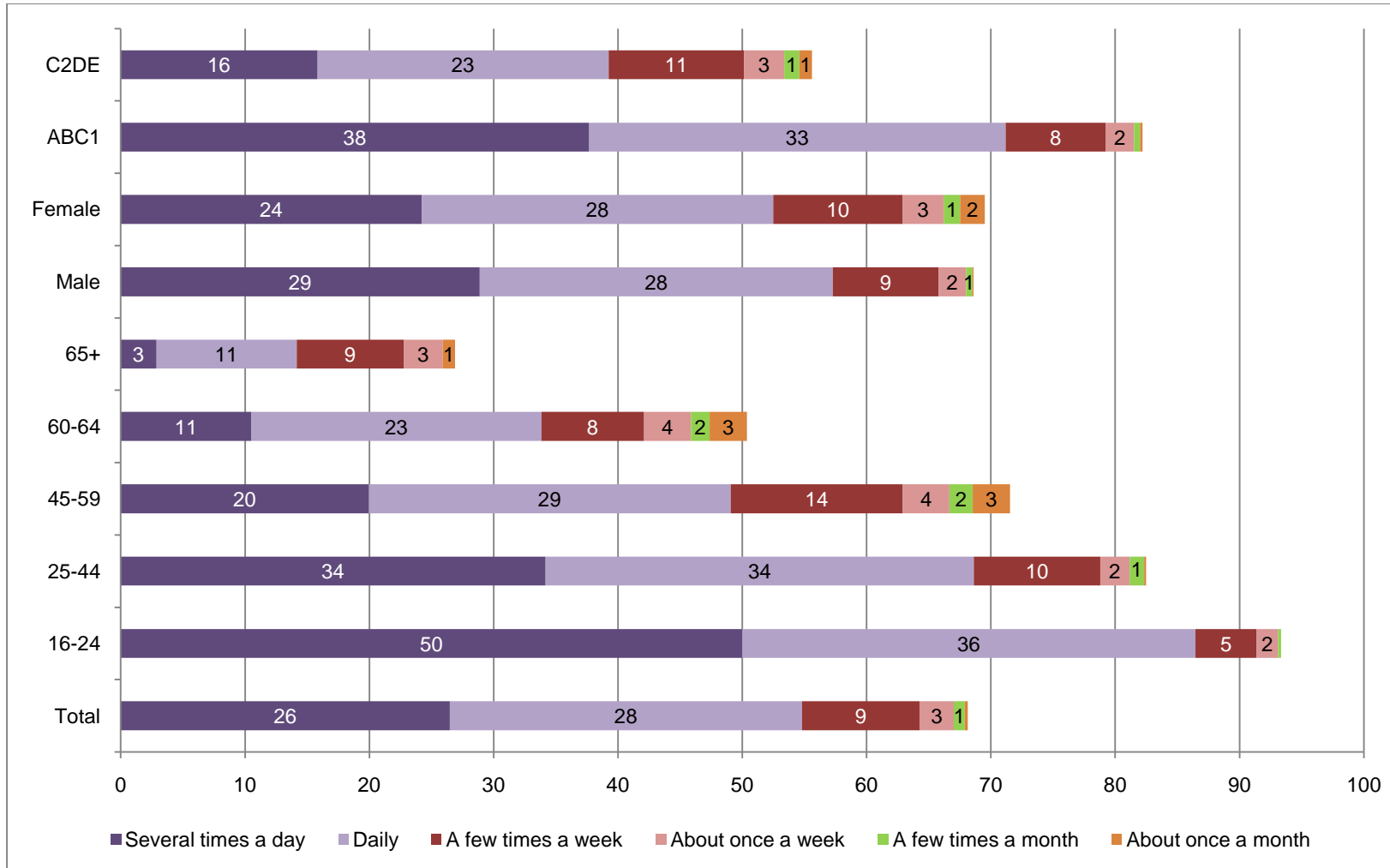
3.5 **FREQUENCY OF INTERNET USE**

3.5.1 **Figure 4** looks at frequency of internet use. In summary over half of the sample (54%) used the internet at least daily, with an additional 12% using it weekly. See **Appendices 5a and 5c**.

- Daily use was considerably more likely amongst the under 44's (86%, 16-24; 68%, 25-44), ABC1 respondents (71%) and to a lesser extent males (57%, male; 52% female).
- Indeed 50% of 16-24 year olds (50%) accessed the Internet several times a day.
- Daily Internet use stood at a lowly 14% amongst the over 65's and at 39% amongst those from C2DE backgrounds.

Figure 4

FREQUENCY OF INTERNET USE



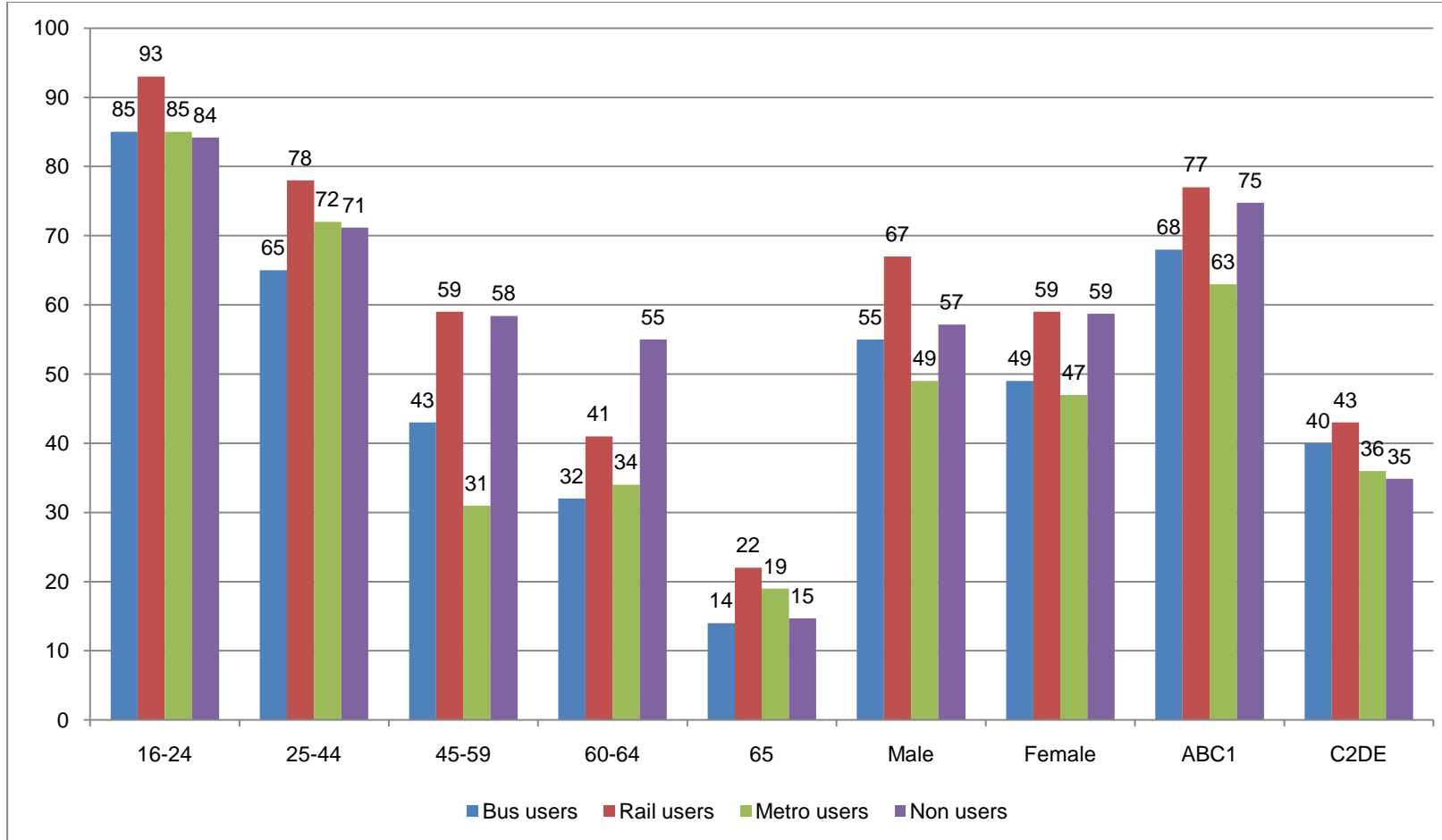
3.5.2

Internet use by public transport use:

- Rail users were the most regular Internet users (63%, daily) with use dipping amongst bus (52%) and Metro (47%) users.
- Non public transport users (58%) were more regular Internet users than Metro or bus users.
- As **Figure 5** illustrates the overwhelming majority of 16-24 year olds across all 3 public transport markets were using the Internet daily (93%, rail; 85% bus and Metro).
- Daily internet use declined significantly amongst users aged over 44 – especially in the bus and Metro markets. A lowly 14% of elderly bus users used the Internet daily, albeit this rose to 22% amongst elderly rail users.
- As one might expect ABC1 public transport users had higher usage levels than those in C2DE groups, especially in the rail market (77%).
- Male public transport users were more likely to use the Internet daily, especially in the rail market (67%) with use dipping to 55% in the bus market.

Figure 5

DAILY INTERNET USE BY PUBLIC TRANSPORT USAGE



3.6 LOCATION(S) OF INTERNET ACCESS

3.6.1 The subgroup of 1426 internet users were asked where they accessed it. **Figure 6** and **Appendices 6a to 6d** summarises this information.

- The overwhelming majority accessed the Internet at home (96%), this was the case amongst all groups of respondents.
- 29% accessed the internet at work and 14% at school/college/university. Just 6% stated use of wifi hotspots and 4% while travelling on bus/train.
- Those in younger age groups (67%), from ABC1 backgrounds (64%) and males (52%) were most likely to access the internet away from home. This was mainly due to them being more likely have internet access at work or at college.
- However young, male, ABC1's were also more likely to use wifi hotspots and access the internet when travelling on bus/train.
- Elderly internet users (10%) and those in C2DE groups (28%) were unlikely to access the internet anywhere other than at home.

3.6.2 **Locations of access by public transport use:**

- Rail (96%), bus (95%) and Metro (93%) users were all most likely to access the Internet at home.
- However rail users were the most likely to access the Internet away from home, mainly at work (34%) or school/college (19%), but also on the move in wifi hot spots (6%) or while using public transport (7%).

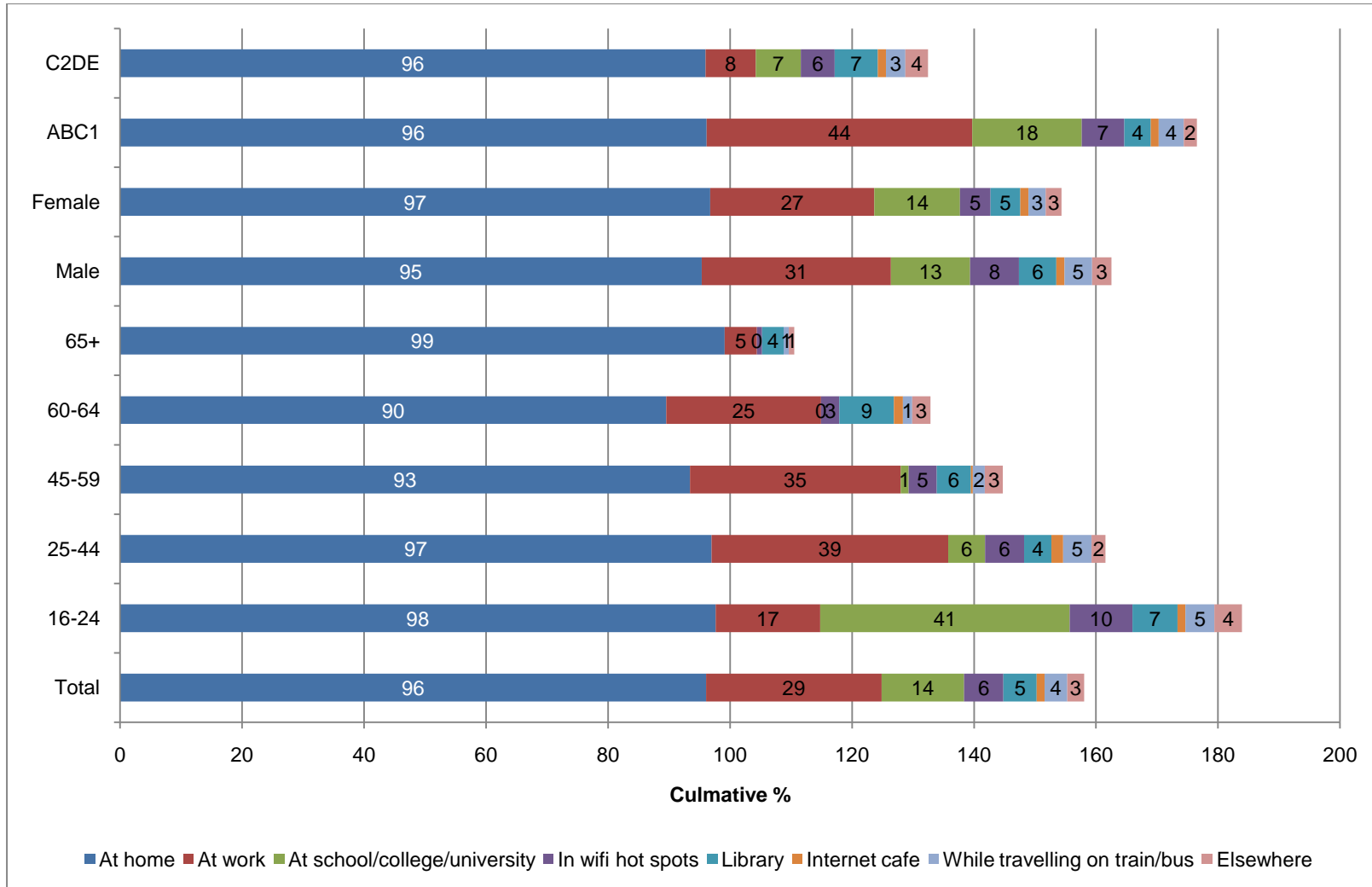
Table 3

INTERNET ACCESS BY MODE OF TRAVEL

	Total	Non user	Bus User	Rail User	Metro User
At home	96	98	95	96	93
At work	29	39	23	34	26
At school/college/university	14	3	17	19	14
In wifi hot spots	6	8	5	6	6
Library	5	2	7	9	7
Internet cafe	1	1	1	2	1
While travelling on train/bus	4	2	4	7	6
Elsewhere	3	2	3	5	4
Base (Weighted)	1425	299	985	418	200

Figure 6

LOCATION(S) OF INTERNET ACCESS %



3.7

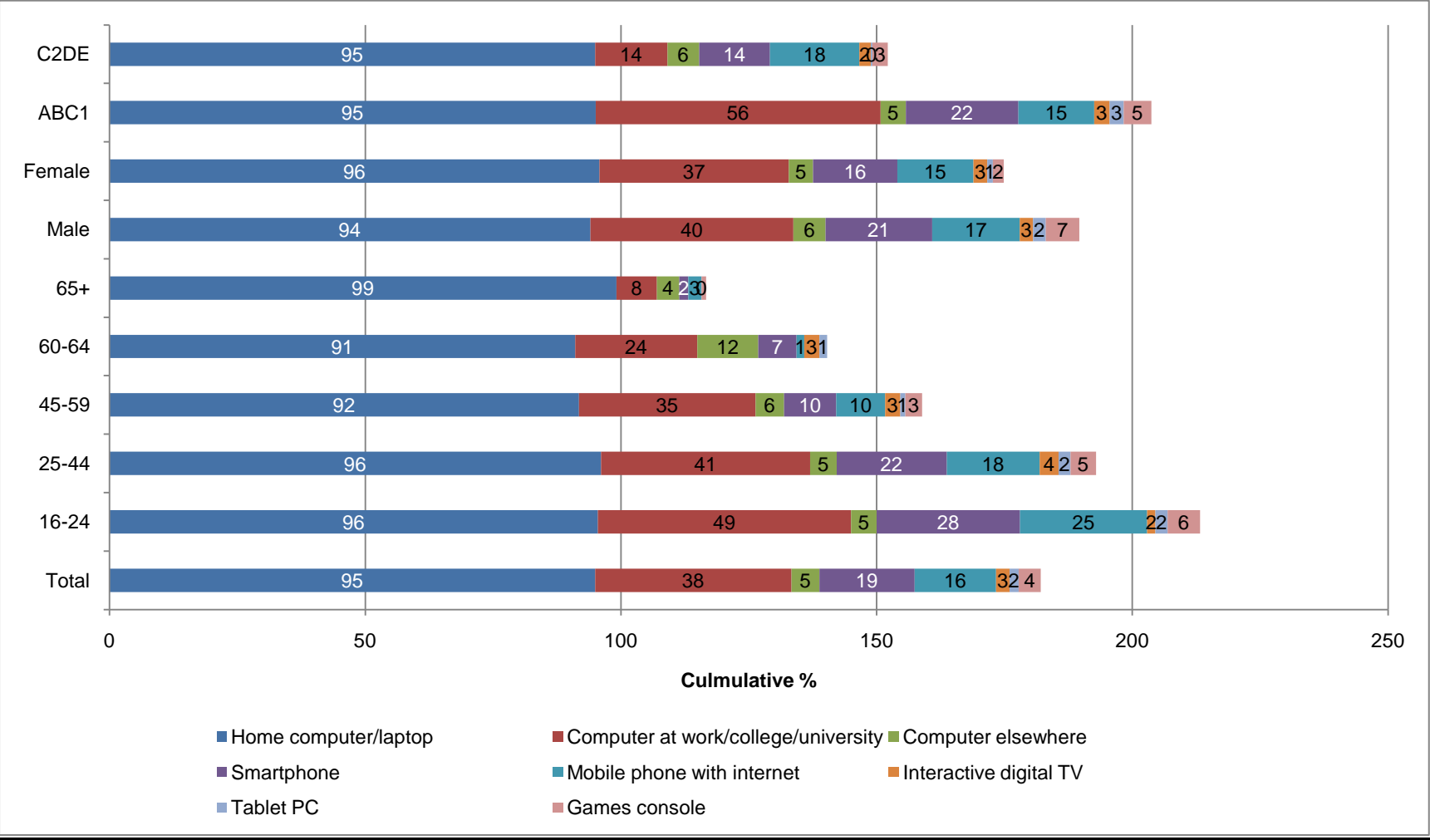
DEVICE(S) USED TO ACCESS THE INTERNET

3.7.1

Those with internet access were additionally asked what devices they used to access the internet. **See Figure 7 and Appendices 7a to 7d.**

- The home PC (95%) was most commonly used. Works/school computer was the next most common (38%).
- Collectively 35% accessed the Internet via a mobile phone, with 19% using the Smartphone and 16% mobile phone with Internet.
- Accessing the internet via digital TV (3%) or games console (4%) was very much a minority activity.
- Younger (79%), ABC1 (71%) and male respondents (63%) were most likely to use a variety of devices to access the internet (other than home PC) partly due to opportunities to access the internet at work/school but also via mobile phones (53%, 16-24; 38%, Male; 37% ABC1).
- Very few elderly internet users accessed the Internet by a device other than their home PC.
- Smartphone use was most prevalent amongst the under 44's (28%, 16-24; 22% 25-44), ABC1's (22%) and males (21%).
- The under 44's were also more likely to use a mobile phone with Internet (25%, 16-24; 18%, 25-44) but, perhaps due to the financial constraints of upgrading to Smartphones, this device was more commonly used amongst C2DE users (18%).

Figure 7
DEVICES USED TO ACCESS THE INTERNET %



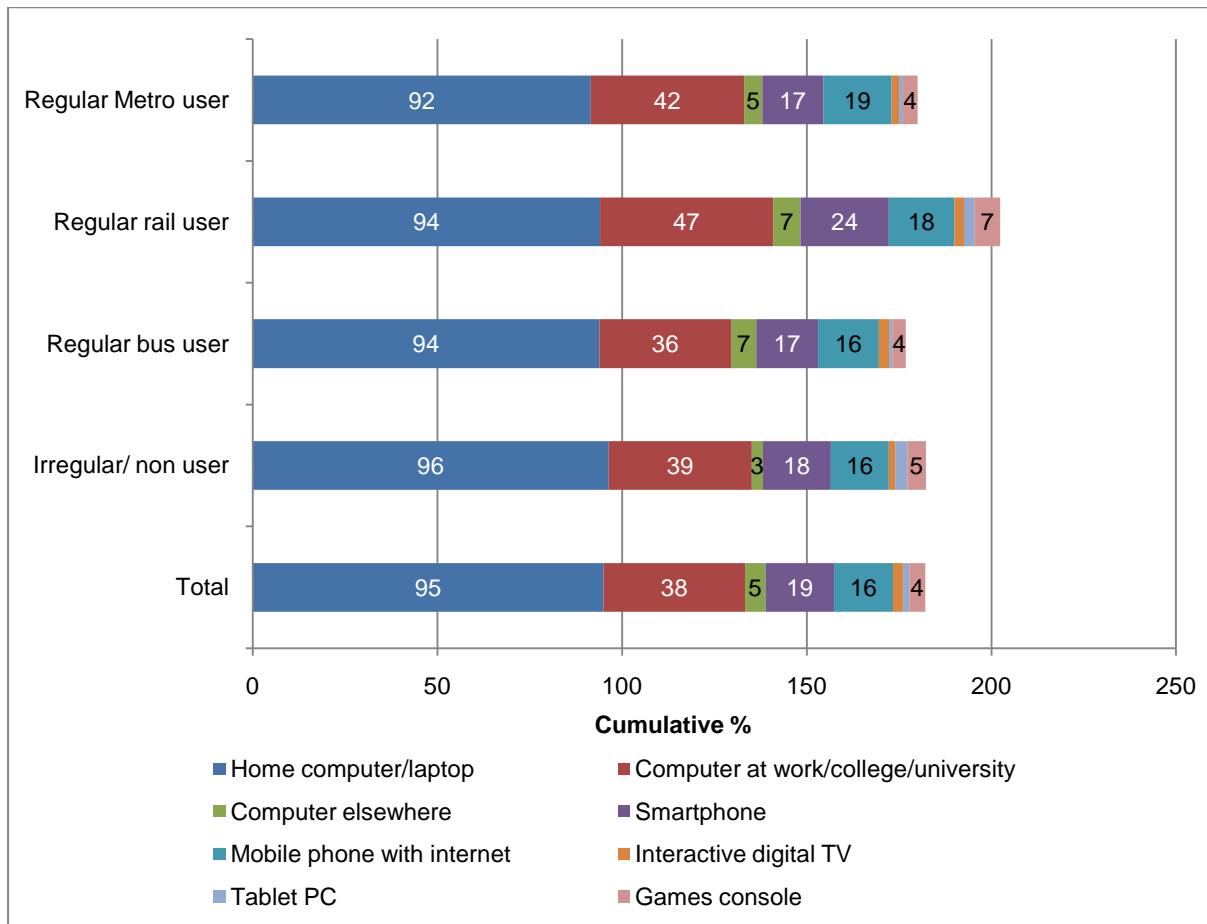
3.7.2

Devices used amongst public transport users:

- The home computer was the most popular device to access the Internet amongst bus (94%), rail (94%) and Metro users (92%).
- Rail users were most likely to access the Internet via a work/education computer (47%) or via a mobile phone (combined 42%) with 24% using a Smartphone and 18% a mobile with internet access.
- However 33% of bus users and 35% of Metro users also accessed the internet via a mobile, albeit access tended to be via a mobile with internet access (19%/16%) rather than a Smartphone. See **Figure 8**.

Figure 8

DEVICE(S) USED TO ACCESS THE INTERNET BY PUBLIC TRANSPORT USE



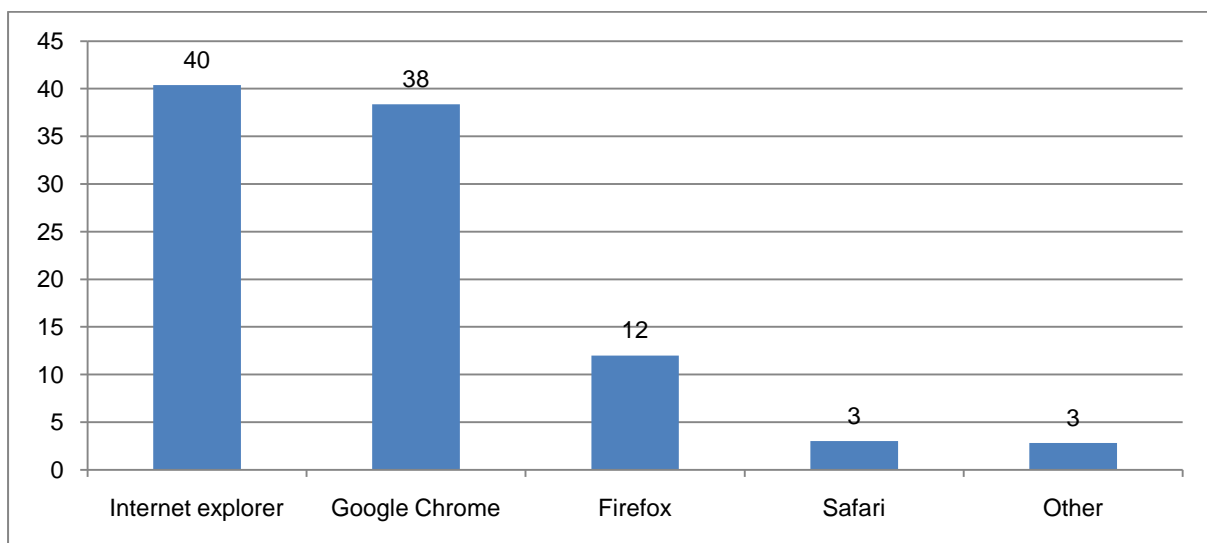
3.8 **INTERNET CONNECTION AND BROWSER/SEARCH ENGINE USE**

3.8.1 **Connection:** The overwhelming majority (98%) connected to the Internet via Broadband. Just 2% used a dial up connection. See **Appendices 8a and 8b.**

3.8.2 **Browser:** The two most popular browsers were Internet Explorer (40%) and Google Chrome (38%). 12% used Firefox. There was little variation in browser choice on the basis of respondent type. See **Figure 9 and Appendices 8c and 8d.**

Figure 9

BROWSER USE %

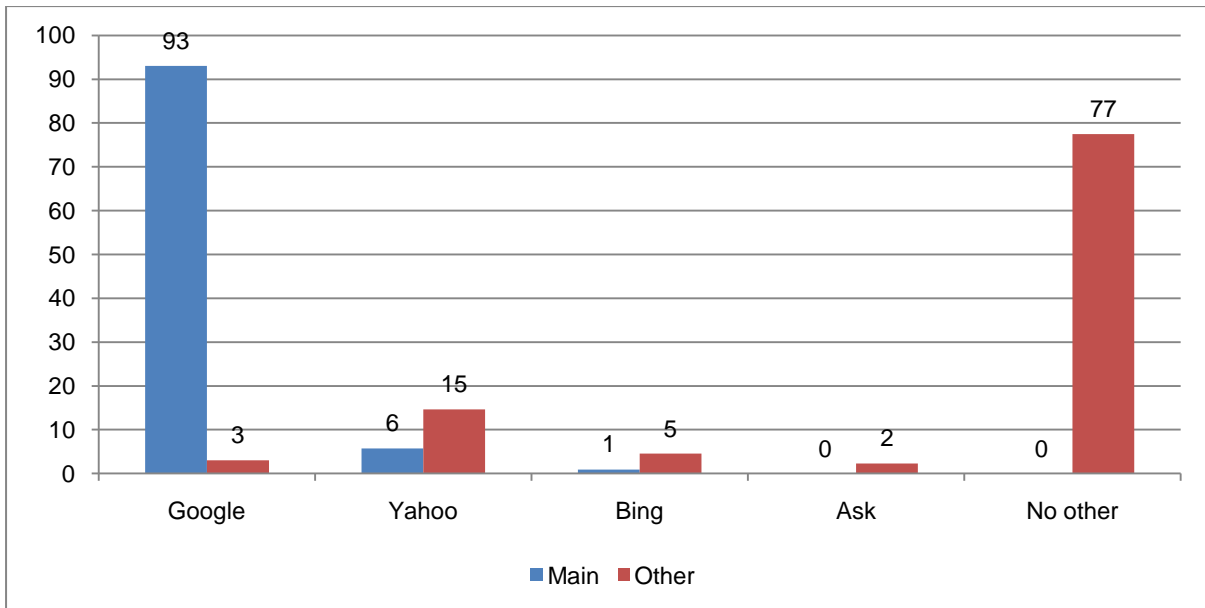


3.8.3 **Main search engine:** By far the most commonly used search engine was Google (93%), this proved to be the case amongst all respondents peaking at 97% amongst 16-24 year olds, dipping to 88% amongst 44-59 year olds. 6% used Yahoo, with this being more popular amongst 45-59 year old users (10%). See **Figure 10.**

3.8.4 **Other search engines used:** Three quarters of respondents (77%) used only their 'main' search engine and no other. This was particularly the case for older Internet users (88%, 65+). 15% named Yahoo as their 'other' search engine (15%). Just 5% said Bing and 2% Ask. A further 3% said Google. See **Appendices 8h to 8j.**

Figure 10

SEARCH ENGINE USED %



3.9 USE OF ONLINE CONTENT

3.9.1 **Table 4** summarises weekly use of different types of online content amongst Internet users, while **Appendices 9a to 9z** offer further detail.

Table 4

% USE OF ONLINE CONTENT

Internet users only

	% Weekly	% Less than weekly	% Never
General surfing/browsing internet	81	12	7
Sending/receiving emails	78	15	8
Accessing Social networking	60	5	35
Finding information work/college information	53	13	35
Finding information on products/services	53	36	11
Instant messaging	37	12	52
Watching/listening to TV/radio/videos	28	23	48
Banking/financial services	24	22	53
Downloading music/games/videos	24	27	49
Buying products or services	18	55	27
Contributing online content blogging/forums	11	13	77
Making travel plans e.g. train tickets etc	6	48	45
Booking holidays/flights	2	49	48

3.9.2 General surfing (81%) and emailing (78%) were the most regular types of online use across all groups of respondents; nearly two thirds (60%) used social networking sites. About half used the internet weekly to

find information on products/services and to find information for work/college (53%, each).

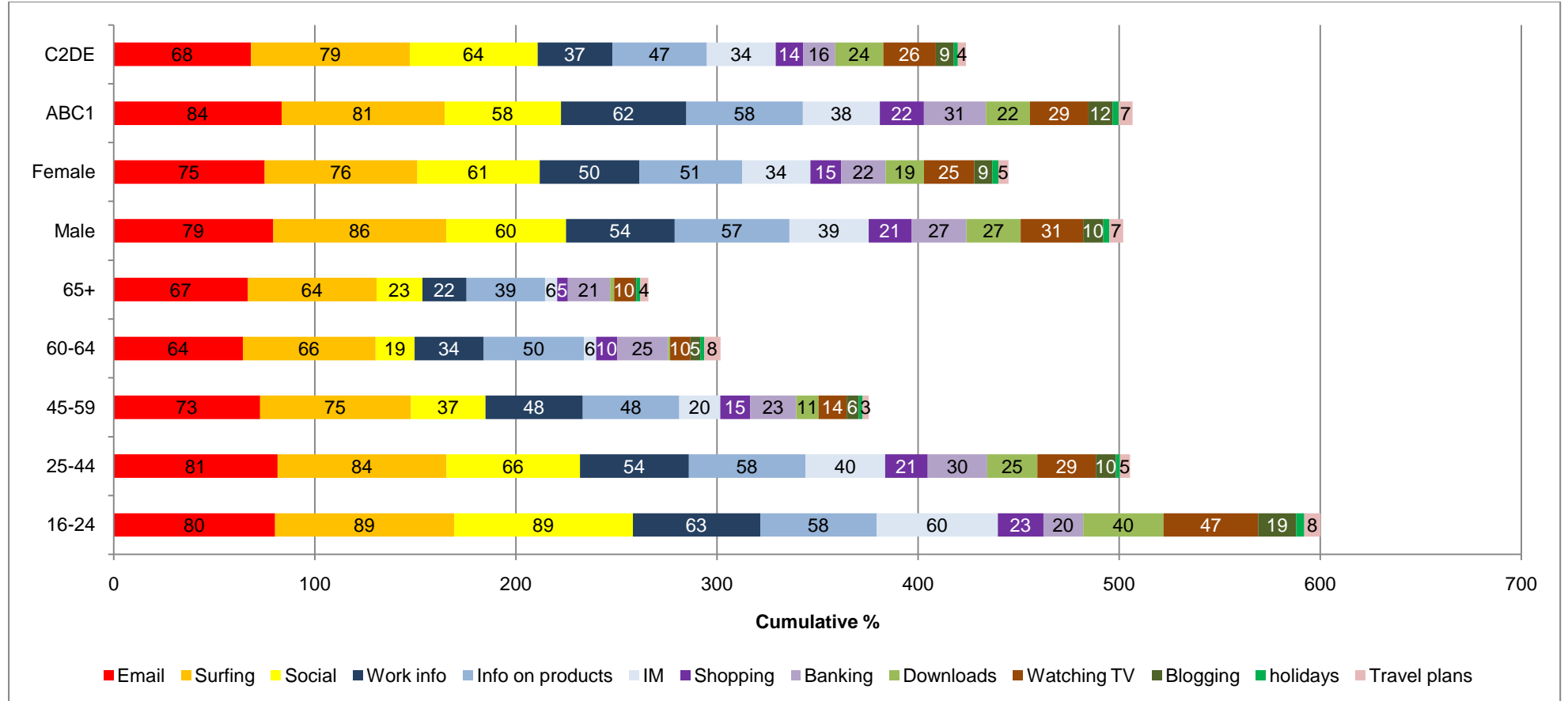
3.9.4 Weekly use was lowest for Instant Messaging (37%) watching on line content. (28%), downloading (23%), banking (25%) and shopped (18%), albeit 55% took part in this on a less than weekly basis. Making travel plans also tended to be a 'less than weekly' activity (48%) rather than weekly (6%). Contributing online content was the least likely activity with 77% never doing so and just 11% doing so weekly.

3.9.5 **Figure 11** looks at internet use by age, gender and SEG in summary the following is of note.

- Young respondents especially those in the 16-24 group were the most regular internet users. This was particularly the case for social networking and general surfing (89%, each).
- Indeed 16-24 year olds were the group most likely to use the internet to find information for work/college (63%), instant messaging (60%) watch TV/radio/videos (47%), downloading (40%) and blogging (19%).
- The over 65's tended to have the lowest levels of use, especially for social networking (23%), Instant Messaging (5%), downloading (2%), watching online content (10%) and blogging (1%).
- Men slightly outpaced women in all forms of internet use.
- With a couple of exceptions ABC1 internet users had higher usage levels than those C2DE groups, especially for emailing (84%), finding works information (62%), banking (31%) and finding information on products (58%).
- However it is interesting to note C2DE Internet users were more likely to use social networking sites (64%) weekly than ABC1 members (58%).
- Rail users were the most regular users of all forms of online content, particularly emailing and generally surfing (84%, weekly) and social networking (63%). They were also the group most likely to use the Internet weekly for travel planning (11%)

Figure 11

% SUMMARY OF WEEKLY INTERNET USE BY AGE, GENDER AND SEG

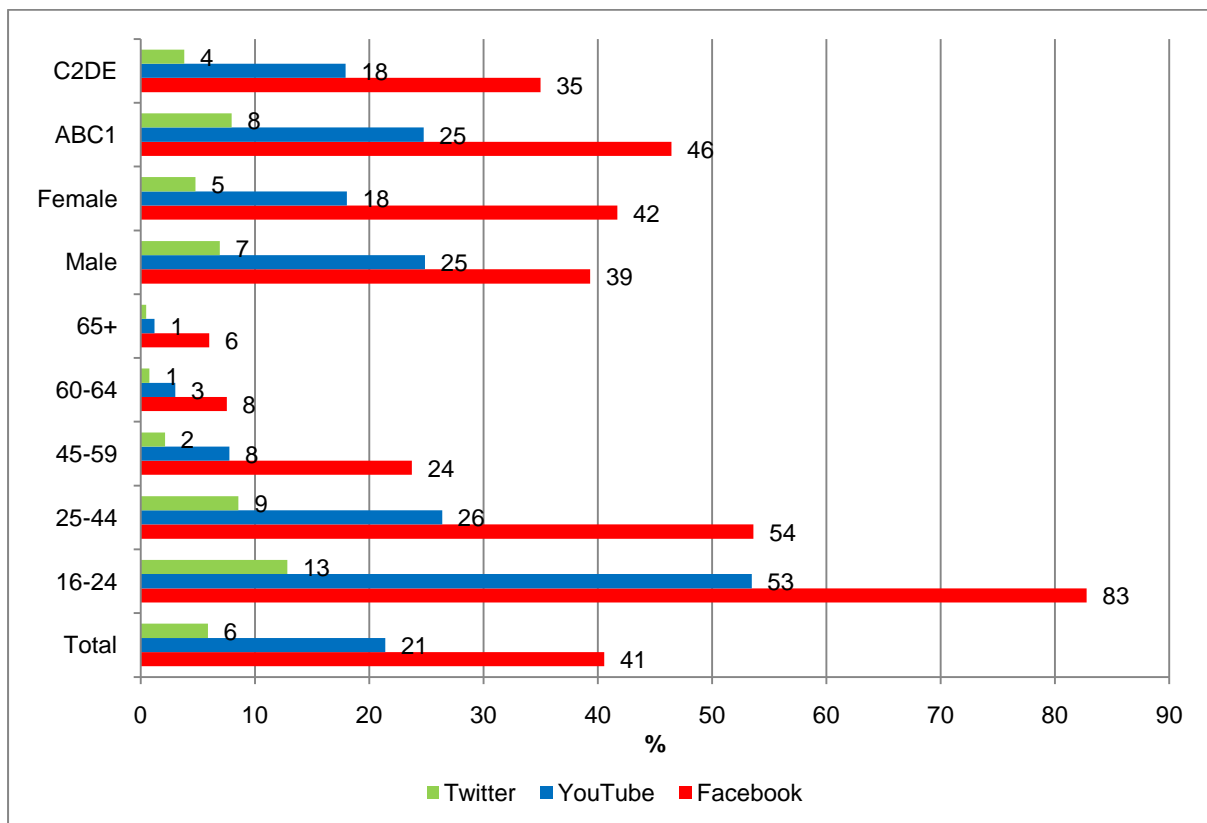


3.12 USE OF SOCIAL NETWORKING WEBSITES

3.12.1 The following section goes on to look in more detail about use of social networking websites. Facebook is by far the most commonly used social networking website (41%, weekly), followed by YouTube (21%) and Twitter (6%). Just 2% used My Space and 1% LinkedIn (1%) **See Appendices 10a to 10l.**

Figure 12

USE OF KEY SOCIAL NETWORKING WEBSITES BY AGE, GENDER AND SEG



- 3.12.2 **Figure 12** examines social network use by age, gender and social group the following is of note.
- Facebook was the most widely use social network website amongst all respondents, particularly amongst the young, peaking at 83% amongst 16-24, dipping to 6% amongst those age 65+.
 - Indeed younger respondents are the heaviest users of all social networking sites (13%, Twitter; 53% YouTube).
 - Few respondents over the age of 44 used social networking sites, with use of Facebook being most likely amongst 45-59 year olds (24%) dipping to 6% amongst those aged 65+.

- Females (42%, weekly) were slightly more regular Facebook users than males (39%, weekly) while male respondents were more likely than females to use Twitter (7%) and YouTube (25%).
- In terms of SEG, respondents from ABC1 social groups were again more regular users, especially of Facebook (46%, ABC1; 35% C2DE) and to a lesser extent YouTube (25%, ABC1; 18% C2DE) and Twitter (8%).

3.12.3

Use of social networking websites by public transport market:

- Rail users were the biggest users of social networking sites (46%, Facebook; 25% YouTube; 9% Twitter), however 41% of bus users and 37% of Metro users also used Facebook. See **Table 5**.
- As one would expect use of social media increased significantly amongst 16-24 year old public transport users with the majority using Facebook (83%, bus; 87%, rail; 83% Metro). An additional 20% of 16-24 year old rail users used Twitter.
- Few public transport users over the age of 60 used social media – albeit more elderly rail users did so than elderly users of bus or Metro.
- ABC1, male rail users were more likely to use social media than the equivalent in the bus or Metro users.

Table 5

USE OF SOCIAL NETWORKS BY PUBLIC TRANSPORT MARKET

	Irregular/ non user	Regular bus user	Regular rail user	Regular Metro user
Facebook	37	41	46	37
YouTube	16	22	25	20
Twitter	5	6	9	8
Myspace	0	1	2	2
LinkedIn	1	1	2	1

3.13

AWARENESS AND USE OF RSS FEEDS

3.13.1

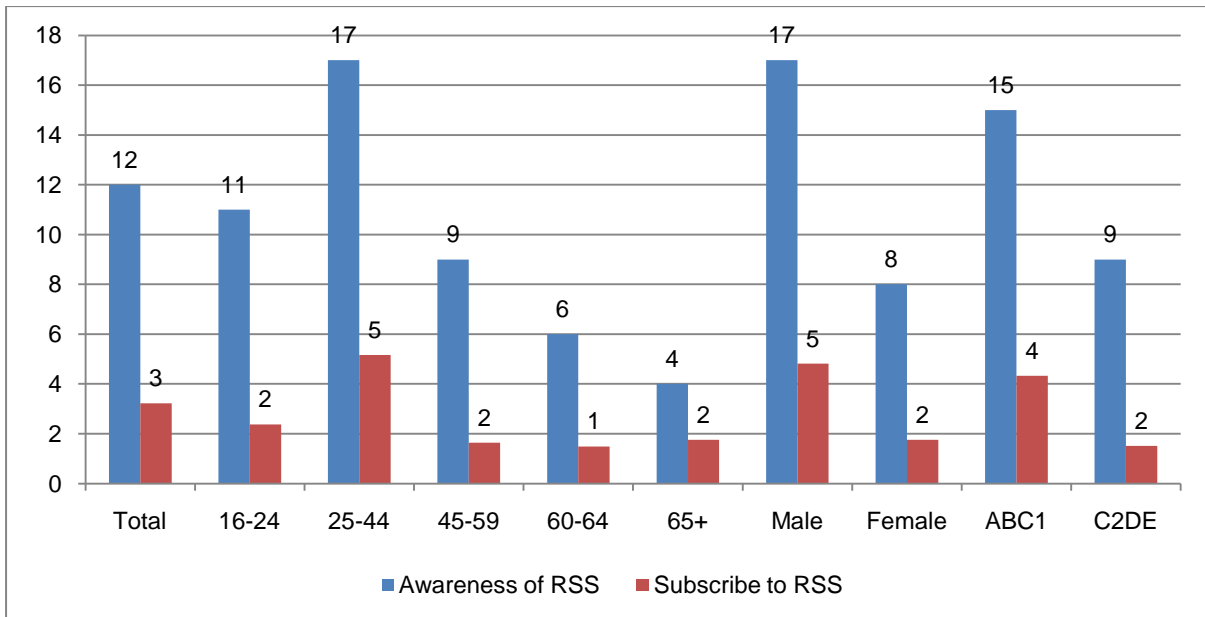
Awareness: Just 12% of internet users were aware of RSS feeds, with awareness levels being slightly higher amongst those aged 25-44 (17%), male (17%) and ABC1 (15%). See **Figure 13 and Appendices 11a to 11d**.

3.13.2

Use of RSS feed: Subscription to RSS feeds was low (3%), being fractionally higher among male, ABC1 (4% each) respondents in the 25-44 age groups (5%). Subscription also tended to be higher amongst rail users (5%).

Figure 13

USE AND AWARENESS OF RSS FEEDS

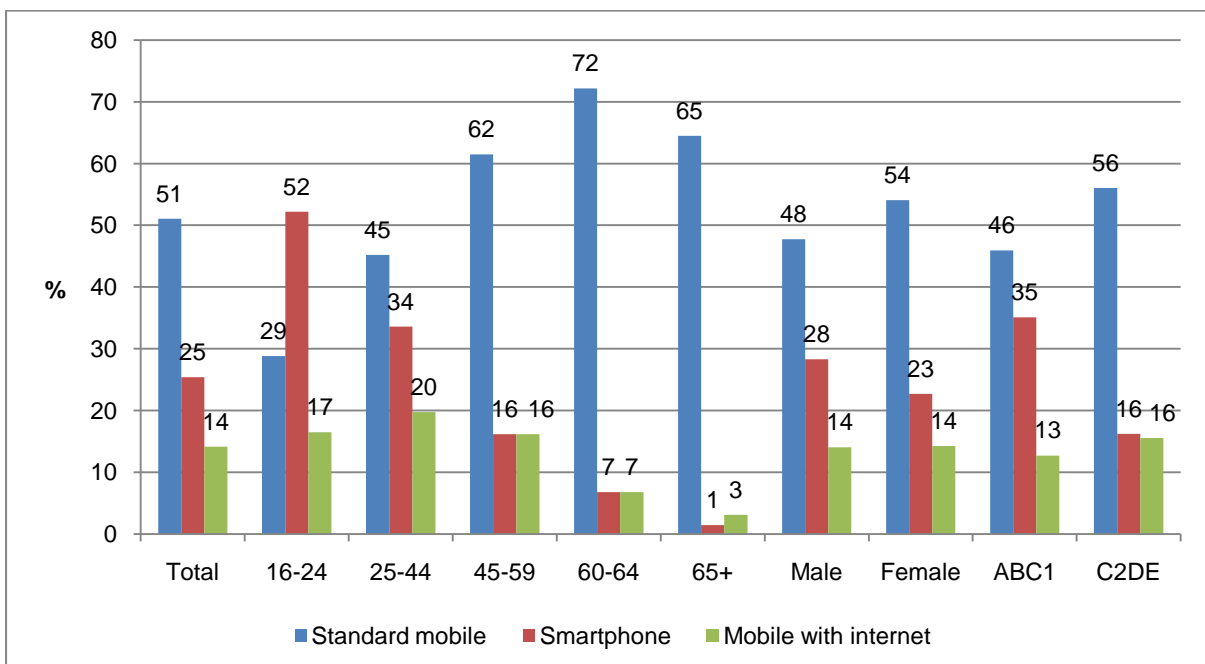


3.14 TYPE OF MOBILE PHONE USED

3.14.1 **Figure 14** examines type of mobile phone used. Just over half (51%) had a standard mobile (call and texts only). 25% had a Smartphone and 14% had mobile with Internet access. See **Appendices 12a and 12c**.

Figure 14

MOBILE PHONE TYPE BY AGE, GENDER AND SEG



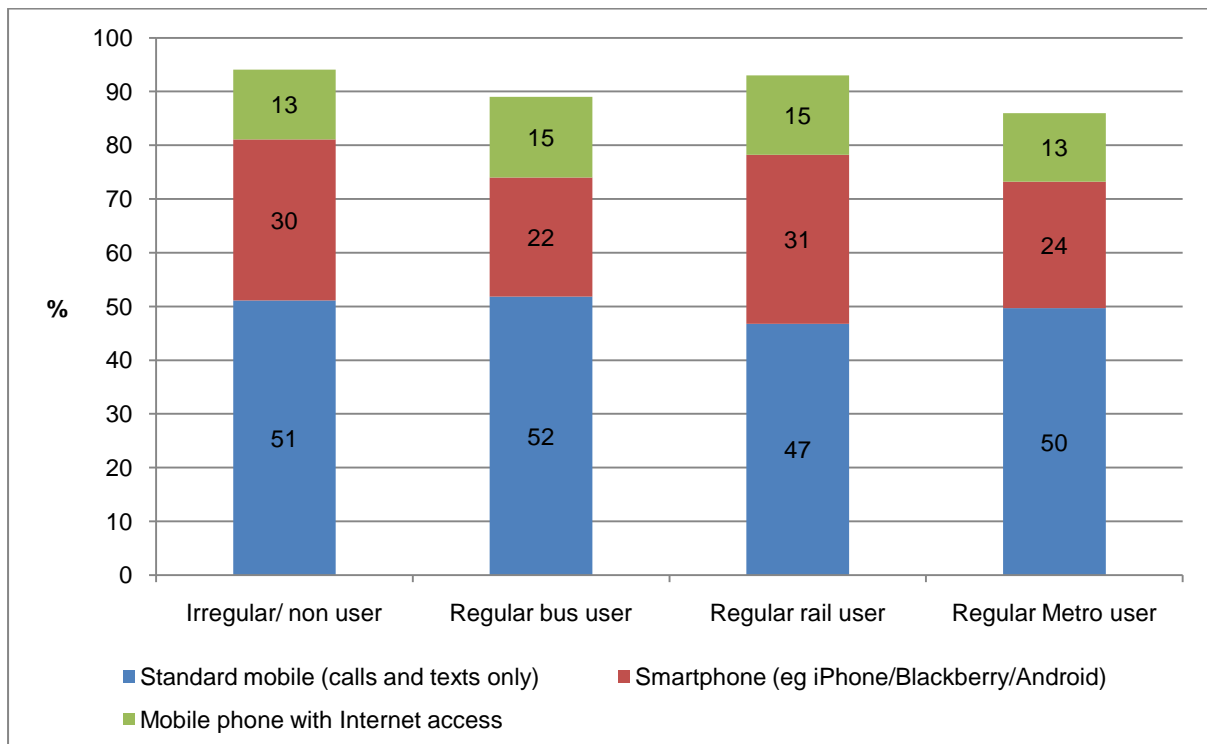
- Again it was the under 44's who were most likely to embrace mobiles with the technology to access the Internet either via a Smartphone (52%, 16-24; 34%, 25-44) or a mobile with internet (15%, 16-24; 20%, 25-44).
- The over 45's were most likely to have a standard mobile. Indeed just 6% of over 65's had a mobile which they could use to access the Internet.
- ABC1 members were more likely to own a Smartphone (35%) than C2DE respondents (16%).
- Conversely C2DE ownership of mobile with Internet (18%) was marginally higher, however the majority used a standard mobile (56%, compared to 46%, ABC1)
- Male respondents (28%) were slightly more likely to own a Smartphone than female (23%), with women more likely to have a standard mobile (54% v 48% male).

3.14.2

Type of mobile by public transport use: Figure 15 looks at mobile phone user by public transport market.

Figure 15

TYPE OF PHONE USE BY BUS, RAIL AND METRO MARKETS



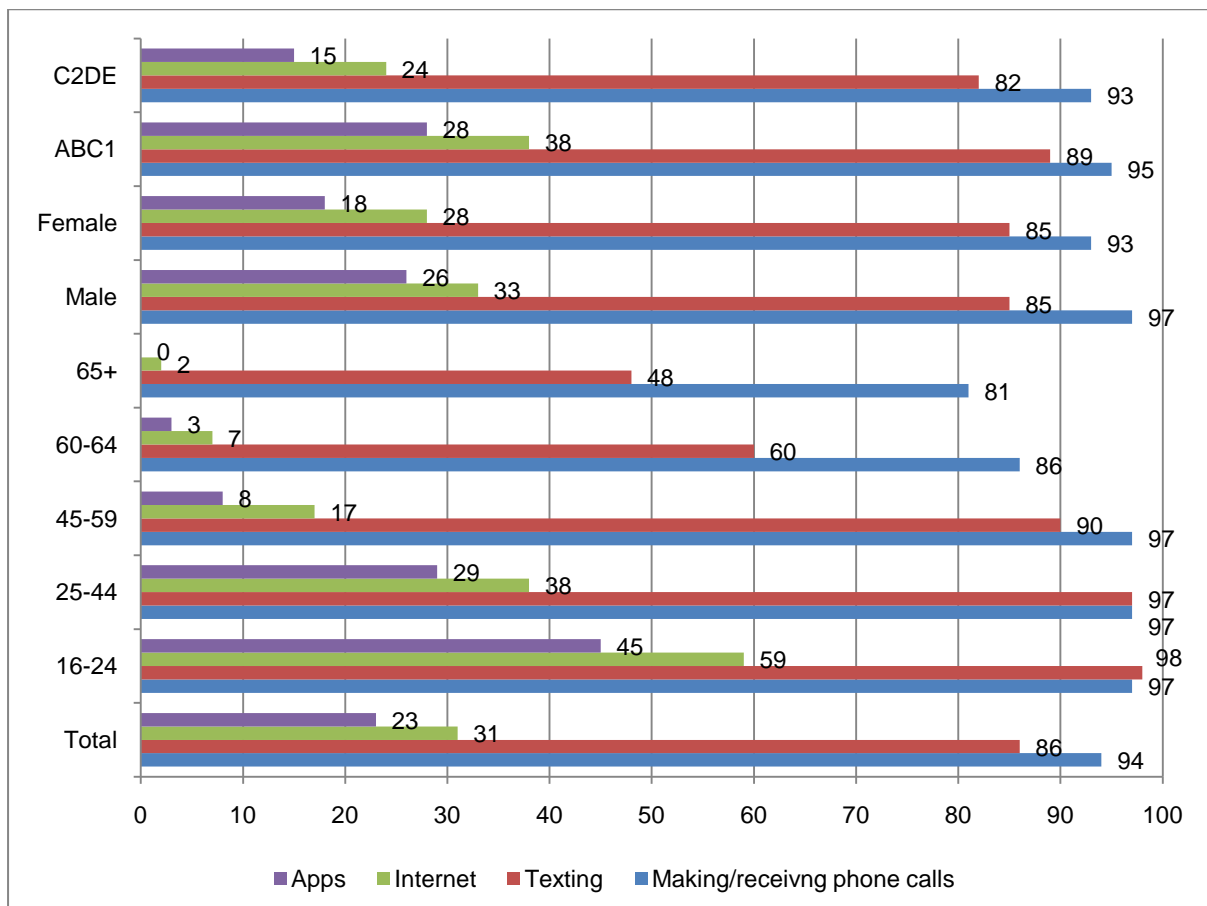
- As one would expect rail users were most likely to own mobiles which could be used to access the Internet with 31% owning a Smartphone and 15% an Internet enabled phone. Indeed Smartphone use in the rail market was fractionally higher than amongst non public transport users (30%).
- In comparison just 22% of bus users and 24% of Metro users owned a Smartphone with standard mobile being more common (52%, bus 50%, metro).
- Smartphone ownership in the 16-24 age group across all markets was high (62%, rail; 50%, bus; 67%, Metro).

3.15 USE OF MOBILE PHONE

3.15.1 Mobile phone users were asked for what reasons they used their mobile. Understandably mobiles were used most regularly for making and receiving phone calls (94%) and for sending and receiving text messages (86%). Nearly a third (31%) used their phone to access the Internet and 22% used mobile Apps. **Figure 16** summarises mobile phone usage by age, gender and SEG. See **Appendices 13a to 13j**

Figure 16

% WEEKLY USE OF MOBILE PHONE BY AGE GENDER AND SEG



- Calling and texting was the most common use of mobile phones across all groups of respondents, albeit it tended to be higher amongst younger, male, ABC1 respondents.
- Internet access via a mobile was considerably higher amongst those aged 16-24 (59%, weekly) and to a lesser extent male (33%) and ABC1 respondents (38%).
- Interestingly Internet access was significantly higher amongst Smartphone users (75%) than those with mobile phones with Internet access (55%), potentially due to these phones having a higher level of C2DE ownership who are less likely to access the Internet via a mobile.
- Use of mobile Apps was at its highest amongst the youngest respondents (45%, 16-24). It was also high amongst those aged 25-44 (29%), male (26%) and ABC1 (28%) respondents. Few respondents over the age of 60 (2%) used Apps.
- Use of Apps rose to 64% amongst those with a Smartphone.

3.15.2 **Use of mobile by bus, rail and Metro market:**

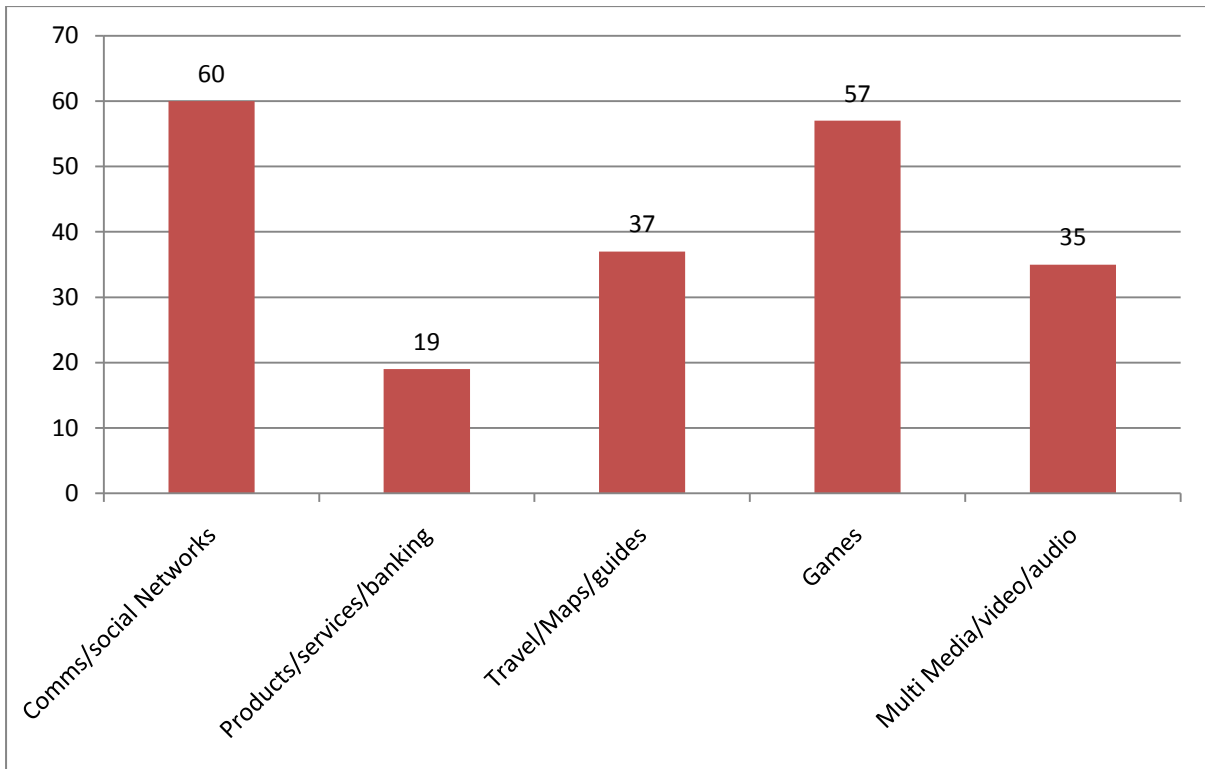
- Use of mobiles for calls and texting was most common across bus, rail and Metro users.
- Rail users were most likely to use their mobile to access the Internet (37%) and for apps (27%).
- Use of mobile Internet is significantly higher amongst 16-24 year olds across all markets (60%, bus; 70%, rail; 75%, metro)
- Use of mobile apps was also higher in this younger age group (46%, bus; 57% rail, 63%, Metro).

3.16 **TYPE OF MOBILE APP USED**

3.16.1 The 468 respondents who used Apps were further asked what type they used. The most commonly used Apps were for communications/social networks (60%) and games (57%). 37% used travel/maps/guide, 35% multimedia Apps and 19% Apps for products/services. **See Figure 18.**

Figure 18

USE OF MOBILE PHONE APPS



3.16.2 **Appendices 14a and 14b** looks at Internet use across the bus, rail and Metro market.

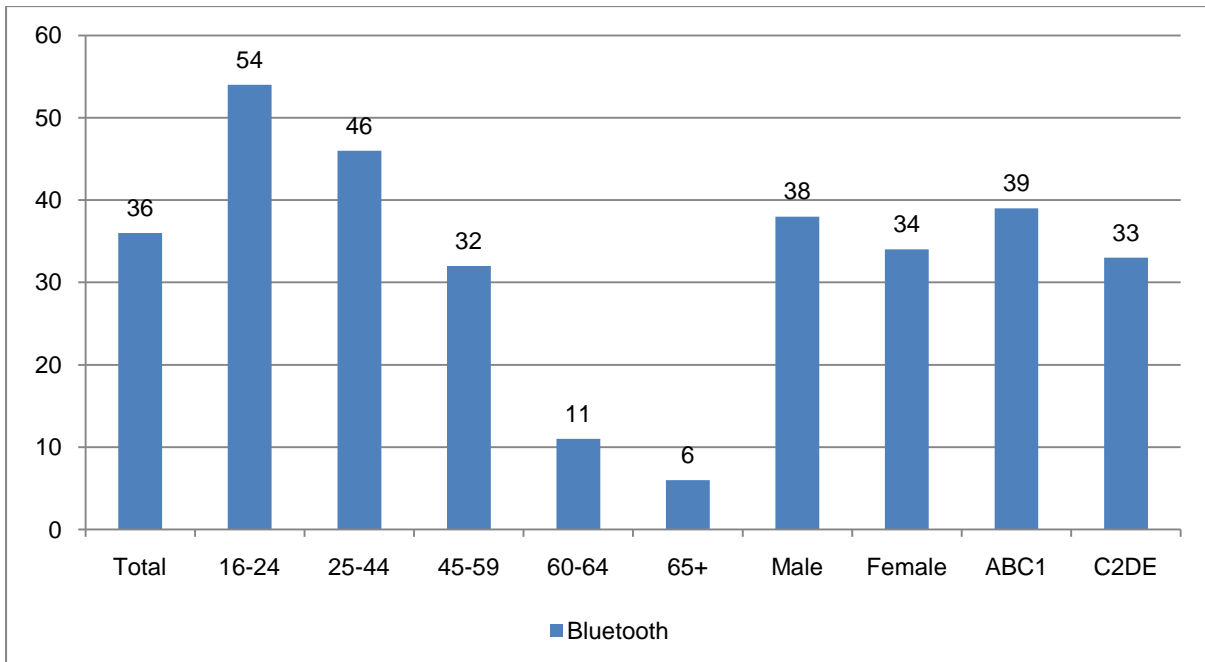
- Use of Comms/social Apps was at its highest amongst younger (66%, 16-24; 61% 25-44) and female respondents (63%) and those from ABC1 (63%).
- Gaming Apps were used principally by the youngest respondents (63%, 16-24) and those in C2DE groups (61%) as well as being slightly more popular amongst male respondents (58%).
- Use of Apps for multi media/video/audio was also highest amongst those aged 16-24 (38%) and in ABC1 groups (37%).
- Respondents aged 45-59 were most likely to use the more practical Apps such as travel/maps/guides (60%) and Apps for products/services/banking (29%).

3.17 **USE OF BLUETOOTH**

3.17.1 Mobile phone users were further asked if they used Bluetooth technology. Overall 36% stated they did. Again the youngest respondents were the heaviest users (54%), with there being a slight bias towards male users (38%) and ABC1 use (39%). **See Figure 19 and Appendices 15a to 15e.**

Figure 19

BLUETOOTH USE BY AGE, GENDER AND SEG



3.17.2 Bluetooth use was overwhelmingly via a mobile phone (98%) with just 15% stating a laptop. Only 26% of Bluetooth users kept it enabled at all times, this figure varied little on the basis of respondent type.

3.17.3 Just 14% of respondents were happy to receive unsolicited messages on their mobile phone. This figure did not vary on the basis of age amongst the 16-59 age groups, however the over 60's did not want to receive such messages at all. There were some signs that male respondents (16%) and those in C2DE social groups (19%) were more willing to receive such messages.

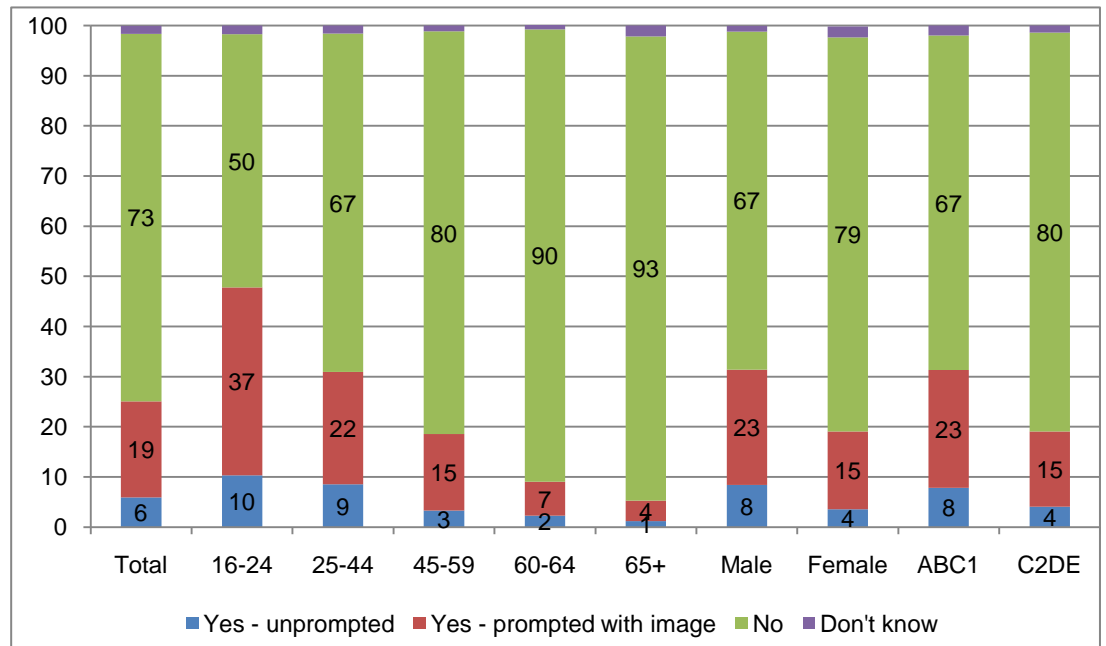
3.18 **AWARENESS OF QR CODES**

3.18.1 **Spontaneous awareness of QR codes:** Respondents were asked if they were aware of QR codes. Just 6% of respondents stated they were. Awareness rose slightly amongst younger respondents (10%, 16-24; 9%, 25-44). It was also marginally higher amongst male, ABC1 respondents (8% each). **See Figure 20 and Appendices 16a to 16d.**

3.18.2 **Prompted awareness of QR codes:** Respondents were shown an example of a QR code and further asked if they were aware of them. An additional 19% stated that they were. Again this was highest amongst younger (37%, 16-24; 22%, 25-44), male (23%) and ABC1(23%) respondents. Interestingly awareness was higher amongst rail users (24%) compared to bus (18%).

Figure 20

AWARENESS OF QR CODES



3.18.3 The 517 respondents who had seen QR codes were further asked where they had seen them. 26% said the *Internet*, 23% *magazines*, 19% *adverts* and 18% *newspapers*. A further 20% said they didn't know.

3.18.4 **How to use QR codes:** Less than half of those aware of QR codes knew how to use them (48%).

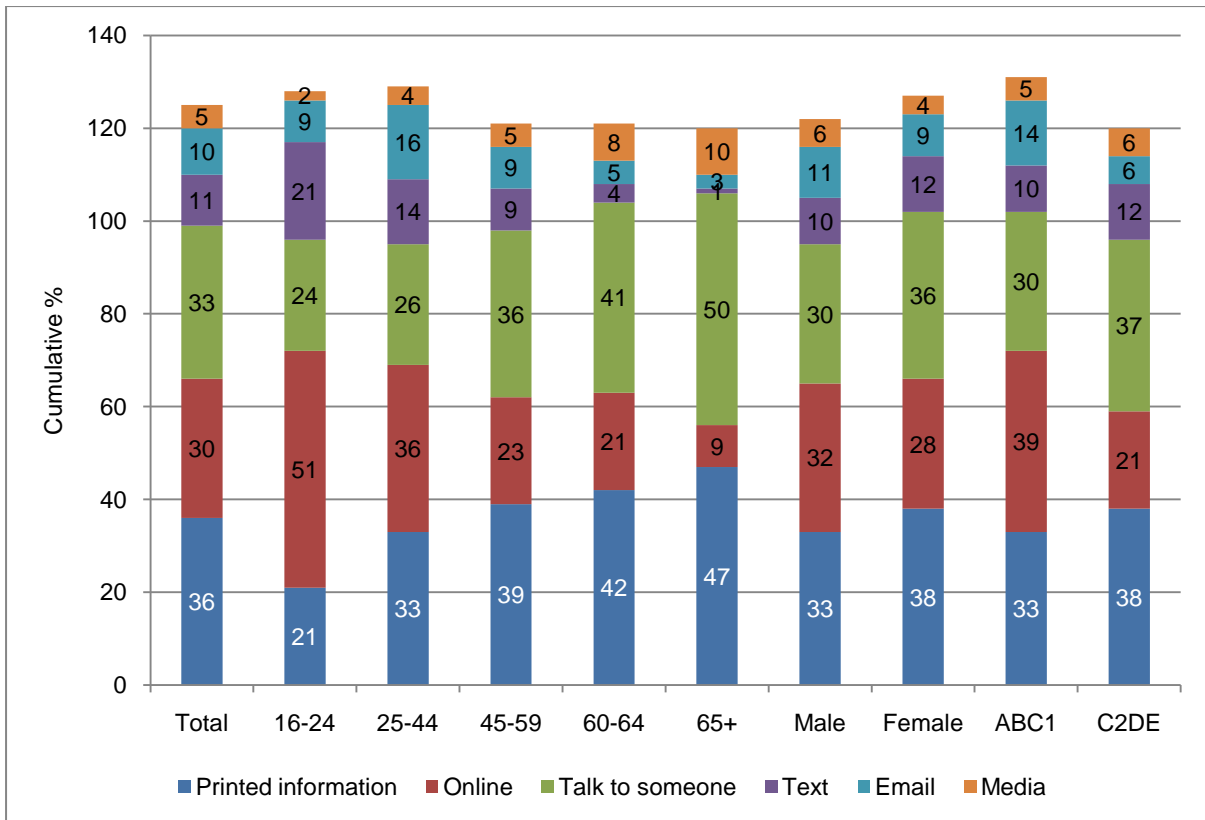
3.18.5 Younger (55%), male respondents (51%) and those from ABC1 groups (54%) were generally more likely to know how to use QR codes than females and those from C2DE groups.

3.19 PRINTED V DIGITAL INFORMATION

3.19.1 Respondents were asked how they would prefer to find out information. Responses were fairly evenly split between printed information (36%), talking to someone (33%) and online (30%). Just 11% said via text and 10% via email. As **Figure 21** illustrates preferences for different types of information very much depends on age, gender and SEG. See **Appendices 17a to 17b**.

Figure 21

INFORMATION PREFERENCE BY AGE, GENDER, SEG



- Younger respondents (51%, 16-24 and 36%, 25-44) and those in ABC1 households (39%) were most likely to want information online.
- Male respondents (32%) were slightly more likely than female (28%) to want information online, albeit the top response for both groups was for printed information (33%, male; 38%, female).
- The elderly were more likely to want information printed (47%) or to talk to someone (50%). Only 9% of those aged 65+ wanted information online.
- C2DE groups either wanted information printed (38%) or to talk to someone (37%). Just 21% wanted information online.
- Wanting information via text rose to 21% amongst those aged 16-24, while email information was more popular amongst those aged 25-44 (16%).

3.19.2

Information preference by public transport use:

- Overall the most common preference for information amongst public transport users was for printed information, albeit

amongst rail users this preference was at the same level as that for online information (38%, each). See **Table 6**.

Table 6

PREFERENCE FOR PRINTED INFORMATION BY PUBLIC TRANSPORT USE

	Irregular/ non user	Regular bus user	Regular rail user	Regular Metro user
Printed in leaflet/poster	29	37	38	42
Online	27	29	38	28
Talk to someone in person/via telephone	32	35	33	31
Text alerts	9	12	9	9
Email	12	8	12	7
Media (TV/Papers etc)	9	4	5	2
Depends on what it is/Not sure	1	1	1	1
Base (Weighted)	407	1479	556	314

- Youthful users of bus (52%), rail (52%) and Metro (47%) all preferred online information.
- In contrast groups aged over 44 preferred printed information or to talk to someone, this proved to be the case in the bus, rail and Metro markets.
- Text alerts were most popular amongst 16-24 year old bus (23%) and Metro users (22%).
- Emails were most popular amongst 25-44 year old rail users (19%).

4.0 **CONCLUSION**

- 4.1 The research has indicated that people in the West Midlands have a relatively high level of access to mobile phones, digital TV and to a lesser extent the internet. However this access is by no means universal. Although access to digital TV was high amongst all groups, access to the Internet and to mobile phones, particularly Smartphones, was very much determined by age, social group and to a lesser extent gender.
- 4.2 Use of digital media was predominantly the realm of the young who proved to be the group most likely to engage with all forms of technology particularly those aged 16-24 years and to a lesser extent those aged 25-44. Usage also tended to be higher amongst ABC1 household, while male use tended to slightly outpace female use.
- 4.3 Internet access tended to be at home via a home computer, however younger ABC1 respondents were more likely to access the Internet in a wider variety of locations such as work/education and on the move in wifi hotspots or on bus/rail. They also used a wider variety of devices to access the Internet such as a works/college computers or a mobile phone, especially a Smartphone. Few elderly or C2DE respondents engaged with the internet in a variety of ways.
- 4.4 Use of online content was commonly for general surfing, emailing and social networking, albeit half of regular internet use was for finding out about products and work/college information. Although overall use of the Internet was lower to watch TV/videos or for downloading or blogging – 16-24 year olds had significantly higher levels of usage in these areas. Indeed younger respondent's use of all forms of online content tended to be high this was especially for the use of social networking websites, in particular Facebook. Few respondents over the age of 44 engaged in social networking websites.
- 4.5 Mobile phone use was also determined by age, social group and gender. Phones with Internet access, especially Smartphones were most prevalent amongst the young and ABC1 groups. Standard mobiles with no Internet access were owned by the majority of over 44's and those in C2DE groups. It was therefore the younger and more affluent respondents who were most likely to use mobiles for the Internet or Apps - with social networking and gaming Apps being the most popular.
- 4.6 So what conclusions can be drawn from this picture of the West Midlands digital market for Centro and its provision of information. Public transport has a significant market of younger users, and in the

case of the rail market, ABC1 users, who have high levels of engagement with all forms of digital media and want, indeed expect, to access information online. Failure to provide accurate digital information to these groups of users who embrace technology so fully could lead to public transport being seen as old fashioned and less attractive in the long term. Centro needs to keep up with technology to fulfil the expectations of these younger users and help keep them in the public transport market. Indeed due to the ABC1, male profile of non user of public transport and their high levels of access to digital media, if this group is ever to be tempted into public transport use it may be that they too would expect accurate, on-line digital information.

4.7 However a considerable proportion of the public transport market is made up of elderly users in particular the bus and Metro markets. Few elderly respondents currently engage with the Internet and those that do, do so less readily than younger respondents. By and large older users prefer printed or in person information. Therefore to go completely digital in terms of information provision runs the risk of isolating this group of users. It should also be noted that the bus and Metro markets are made up of significant proportions of C2DE members, and respondents aged between 44 and 59 who although they are engaging with technology more regularly than the over 60's are either less confident or are less able financially able to engage as fully as their more youthful counterparts.

4.8 The digital market is rapidly changing and advancing, currently only the young and affluent seem to be embracing it fully, however as the latest Ofcom research indicates more elderly users are seeing the advantages of digital innovation and engaging with the Internet. On-going market research through Centro's tracking studies should monitor how Centro's various customers segments are engaging with different forms of technology, tracking on-going changes to help guide information strategy.