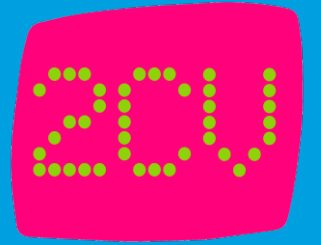


TfL powered apps - market review findings

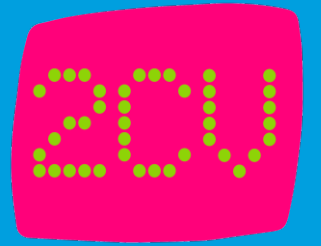
Stop & think session

17th June 2015

Contents

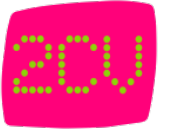


- 1 Background and objectives
- 2 Summary of travel tools research
- 3 What current TfL data tells us
- 4 Social media and discourse analysis
- 5 Summary

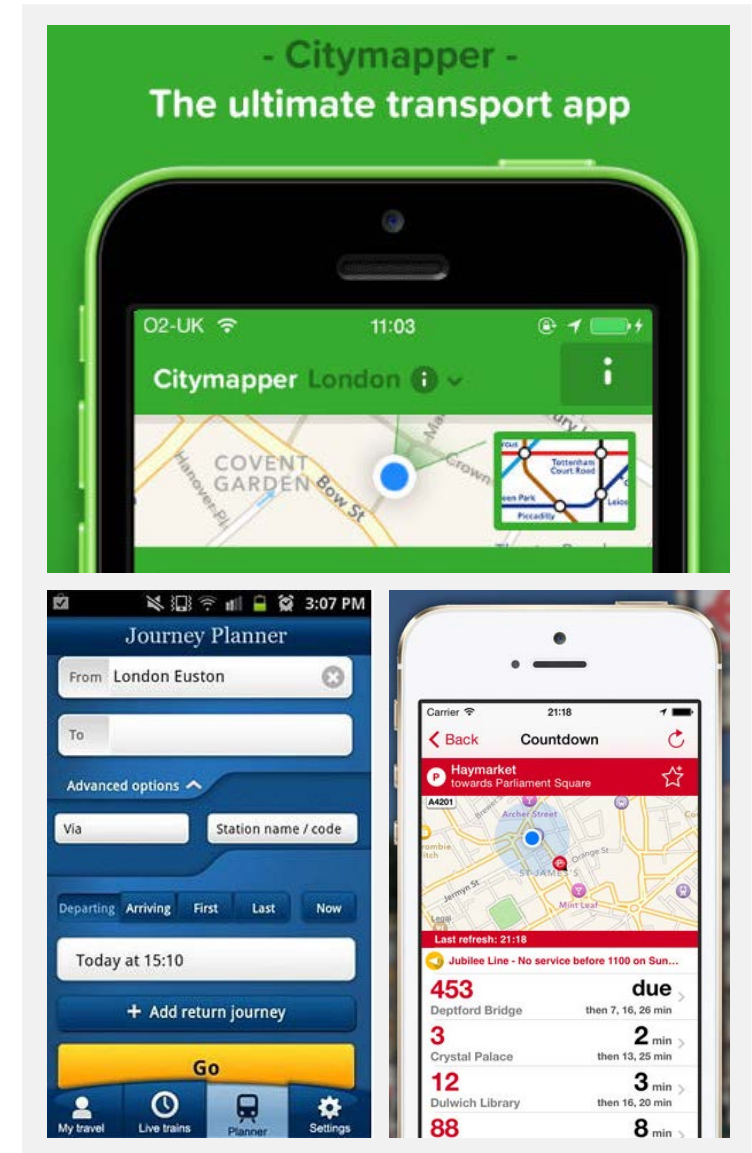


Background and objectives

Background



- As of January 2015, 7 million people across the UK access travel information through a mobile application. National Rail have the most used travel app in the country with over 1.3 Million people accessing it each month (Source: *ComScore January 2015*).
- TfL currently has a successful Open Data strategy that has led to the powering of over 360 travel apps in the UK market – all utilizing TfL’s data in a multitude of different ways.
- In past research for TfL conducted by 2CV, customer appetite for a TfL app has been clear (indeed many customers believe they are already using TfL apps!). However, TfL’s strategy stipulates that building an official app for customers is not necessary unless a clear gap in the market (not already filled by TfL data-powered apps) can be identified.
- Before any large scale strategic work is undertaken, TfL want to gain a better understanding of the travel app market – focussing on the 360+ apps they power - there is a need to understand which of these apps customers value and why.
- TfL has also commissioned a large scale project (TfL Touchpoints) to inform its customer information strategy. This piece of work will look at identifying current and future gaps / opportunities in customers’ needs and will aid understanding of the potential for a TfL app
- 2CV propose that a small scale piece of qualitative research with customers to understand any clear gaps / opportunities and inform the development of TfL’s future app strategy



This research seeks to answer three questions...

200

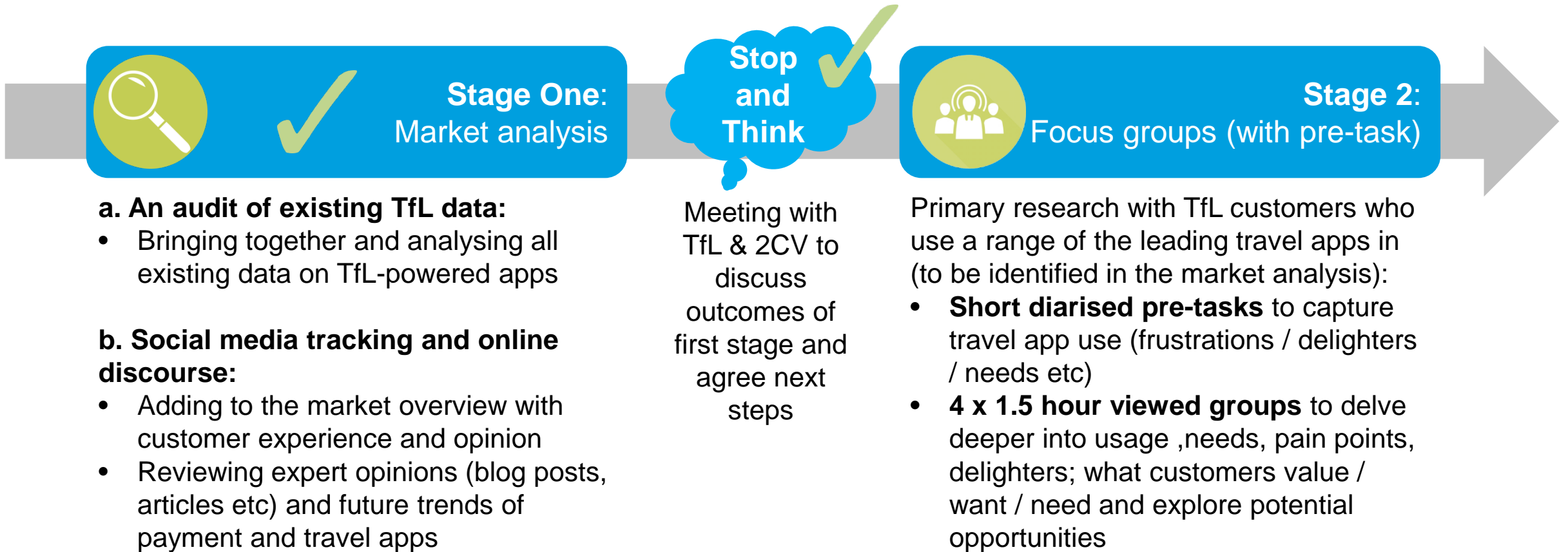
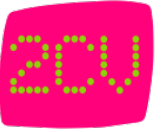
What apps are TfL powering and what needs are they fulfilling?

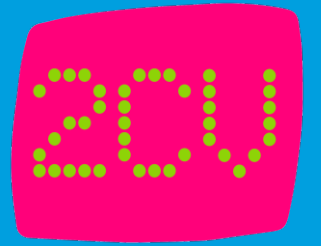
How do customers feel about these travel apps powered by TfL and what do they value most about them?

What are the gaps / opportunities for TfL in this already busy space and reputational impact of delivering against these?

... and inform TfL's future app strategy

Our approach

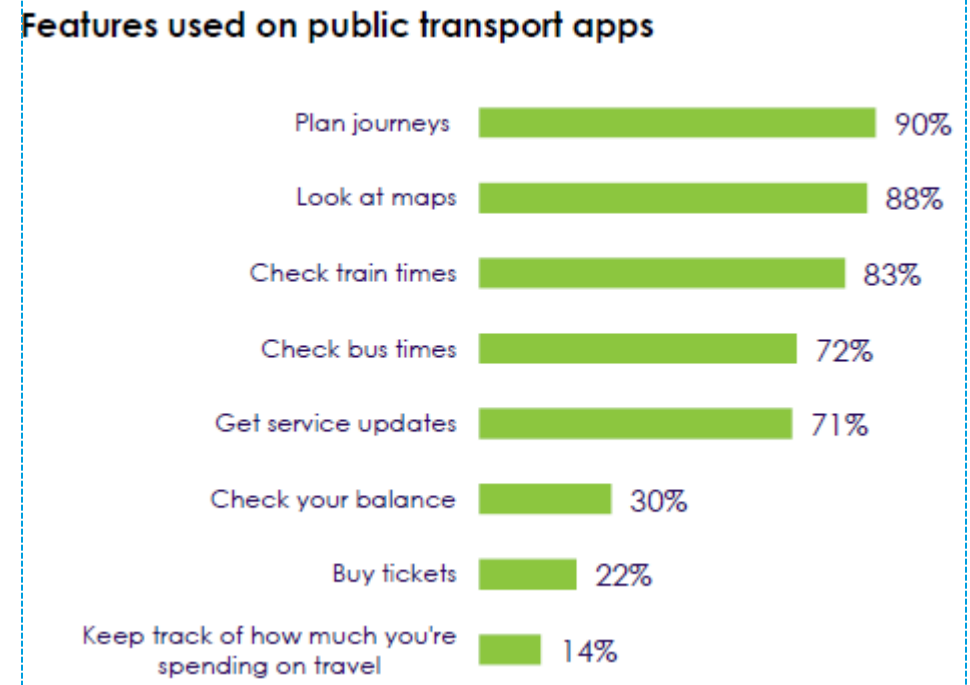
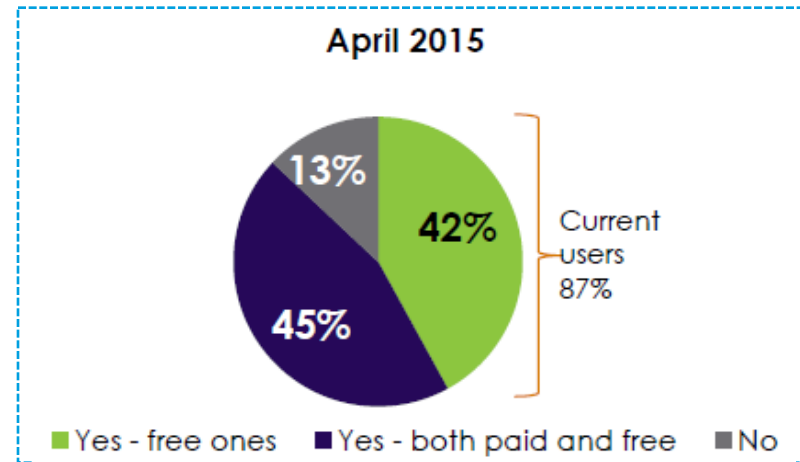




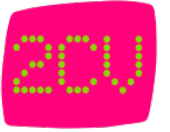
Summary of travel tools research

Most mobile internet users use apps (87%)

- 45% of mobile internet users are using **both paid and free apps**
- Amongst app users, around **three quarters prefer using apps** to websites at least some of the time; however a quarter always prefer to use websites
 - Apps** are viewed as **easier to use and find information**
 - Websites** are felt to offer more **detailed information**
- There has been strong growth in use of public transport apps in the past year (+17%); **planning journeys, looking at maps** and **checking transport times** are the most **common** uses
- When asked to consider a TfL app, customers place most importance on being able to **check transport times, plan journeys** and get **service updates** (as currently available on Citymapper, Moovit etc.)



What have we learned about customers needs from a TfL App?



- In August 2013, customers were becoming accustomed to more advanced digital technologies and expected TfL to keep up
 - At this point, customers were seeking an Oyster management tool that would provide live, synced data, alerts when credit was below a personalised set amount, easy to navigate visual design and ability to see tracked journeys
- While customers feel relatively well served by TfL and other travel information tools, they anticipate development in the world of digital travel solutions:

Integration of tools
and services into
one place

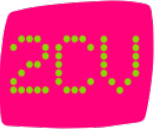
Personal control
and choice over the
information they
receive

A tool to overcome
existing pain points
(particularly in
relation to fares and
ticketing)

More proactive
'push' to meet and
anticipate individual
needs

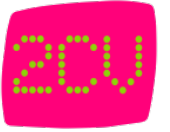
- Current Touchpoints research has found that broadly, the information provided by TfL is meeting their needs, but they still have expectations of future improvements in line with the following:
 - More proactive and personalised / localised information that is pushed to them
 - Consistency of information that tallies with the service (particularly when service has 'gone wrong')
 - Consistency of information and channels across network/modes
- Ultimately customers expect a personalisation solution delivered via an 'app' as this is how other companies meet this need
- The solution should ultimately combine travel planning and TfL account management in one tool – although customers are clear, they do not want this at the cost of user experience or privacy
- In addition, it is clear that a Fares and Money Management App could help customers manage their fares and ticketing more conveniently, as well as attract more customers to move online

Oyster online management tool: Key functions required



Following the 'simple and deep' principle – easy to navigate information,
with the ability to 'go deeper' as and when relevant

Since 2013, access to travel information has grown and customers feel well served for travel solutions



- Customers now use a range of different resources to plan and manage London travel. Usage largely falls into: Journey planning and problem resolution (with planning much more top of mind)

Active journey planning

- TfL site - *Journey Planner*, Online management of Oyster
- Dedicated travel apps – *City Mapper*, *Live Bus arrival*
- Other digital solutions – *Twitter*; *Google Maps*

Some of the apps available, like Citymapper have set the standard. Travel info, cost. It's all there

Resolving problems (typically about ticketing)

- TfL site
- TfL Staff
- TfL Call centre

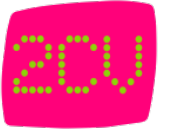
You only need to speak to staff when you need something sorting out. Something up with your Oyster

I've been really happy with how my call was handled. Really professional

The TfL site works well and you can see it's improved a great deal. It's more accurate than it used to be

Customers feel existing solutions meet their needs and few initial calls for new services are being made. But clearly an appetite to better integrate into one place

Customers are now looking for a more 'personalised' solution



1. Planning and scheduling their journeys – viewed as more essential and considered to have a more significant and positive impact on how they plan and use the network

These customer solutions are seen to be about **day to day travel needs** and associated to the existing TfL service

These are the ones I'd use most. The ones that could help with how I plan

This is what you'd use when you are using public transport. This is the stuff you'd need when you're out there

2. Managing their TfL account – viewed more as helpful tools to enable them manage their wider TfL experience

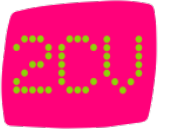
These customer solutions are viewed as new and could **help build and foster relationships** between customers and TfL, if they deliver in the way customers want them to

I see this as ways that allow me to manage My TfL.

I get to choose whether I want to hear from them or not.

There is an assumption that any personalised solution will be delivered via an app

More recently we explored a new Fares and Ticketing mobile app



TfL Mobile App functionality:

- Check account balance and journey history on the move
- Receive personalised push notifications from TfL relevant to your travel and account management
- Top up your Oyster card via the mobile app
- The next time you touch in on any Oyster card reader the credit has been automatically updated to your Oyster card
- In the event of service disruptions, apply for refunds
- Touch your Oyster card to your mobile phone after you have paid for a top up online and the credit is available immediately on your Oyster Card

What's working well

Offers flexibility: Topping up on the move, flexibility to go to any Oyster reader

Real time: Ability to use the next time you touch in meets customer need for speed and ease

Feels personalised and like TfL cares: Push notifications and easier way to get refunds

Innovative: Using mobile and Oyster together feels exciting and a new innovation

Potential to move more customers online: Many customers agreed this would make them buy more of their tickets online via the app

Watch outs

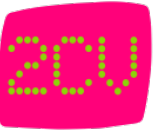
Security of personal/payment details is on customers' minds. Customers need reassurance of security – PayPal was regularly mentioned as a preferred secure payment mechanism

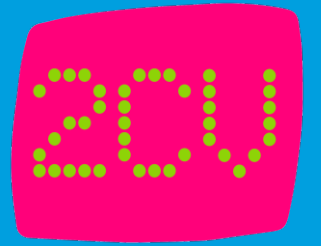
Needs to meet industry standard for payment tools. Poor user design will be off-putting Banking apps / Amazon seen as good benchmarks

Top Customer Requests:

- ✓ Secure
- ✓ User-friendly
- ✓ Personalised
- ✓ Real time

The app proposition met customers needs and showed potential to move more customers online





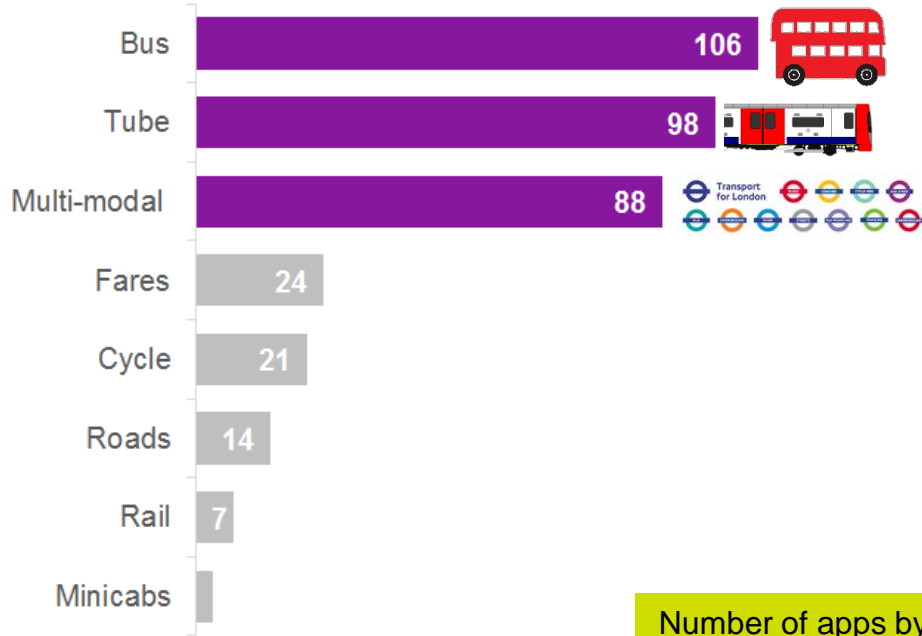
Analysis of 2014 TfL data

Key facts

N=361 Travel apps

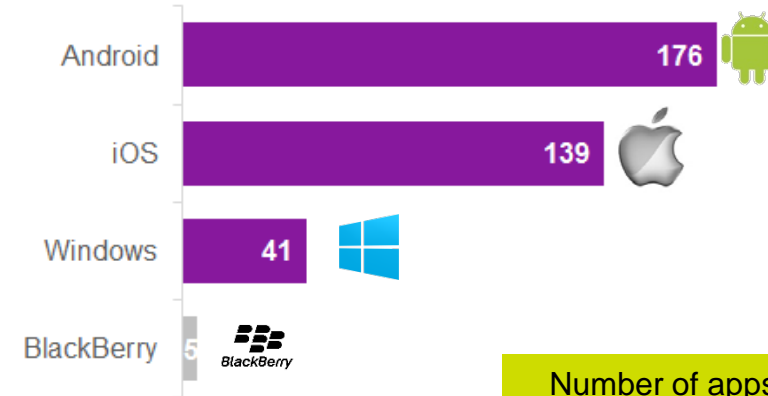


Buses, tubes and multi-modal are the most common types of apps



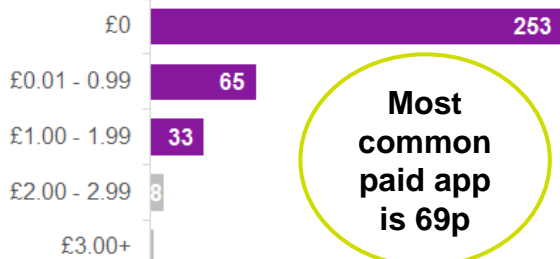
Number of apps by mode

Android is the most saturated platform, and then iOS



Number of apps by platform

The majority of apps are free



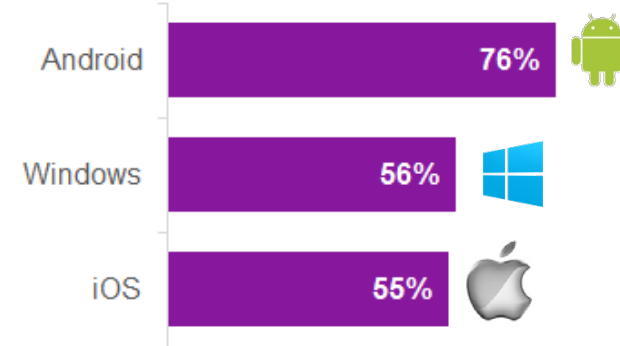
All apps – cost of apps

Apps are not necessarily rated better because they are free



Ratings of 4/5 on customer satisfaction

Apps available on Android are more successful in terms of customer satisfaction – room to improve offering on Windows and iOS



Ratings of 4/5 on customer satisfaction by Platform



Top 5 downloaded apps (500,000+ installs)*

1. Moovit: Bus Rail & Tube Info

Say goodbye to waiting for that bus, train or tube and say hello to Moovit, your free, local journey planner, featuring live arrival times, up-to-date timetables, local station maps, service alerts & changes that affect your trip -- all from the community of other riders nearby!



5,000,000 - 10,000,000 installs

2. Offi – Public Transport Buddy

All-in-one app for public transportation:

- Live departure times (including delays)
- Nearby stations (also on a map)
- Journey planner (door to door)
- Interactive network plans



5,000,000 - 10,000,000 installs

3. Tube map – London Underground

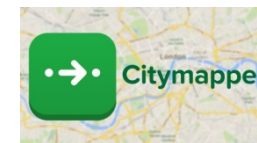
Feature rich with over 1.5 million active users it's not surprising Tube Map. From finding a station, planning a journey to line status and so much more. It all centres around the iconic TfL tube map, keeping it at the heart of the app.



5,000,000 - 10,000,000 installs

4. Citymapper

Citymapper is reinventing the everyday urban transport app and making the large complicated cities simple and usable. A to B journey planning, real-time info on all modes of transport where available (next departures and line status), book a taxi or a car through our integration with Uber and Hailo, weather, alerts, disruptions and everything you need and may not even realise that you need to manage your life in the city.



500,000 - 1,000,000 installs

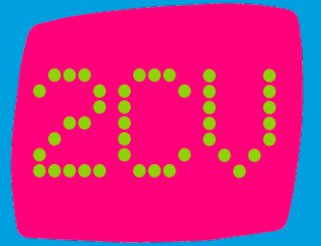
4. Transit app

Transit displays all nearby transport options and departure times instantly. Bus running late, again? Quickly plan a new route, request an Uber, or grab the closest bike share or car2go.



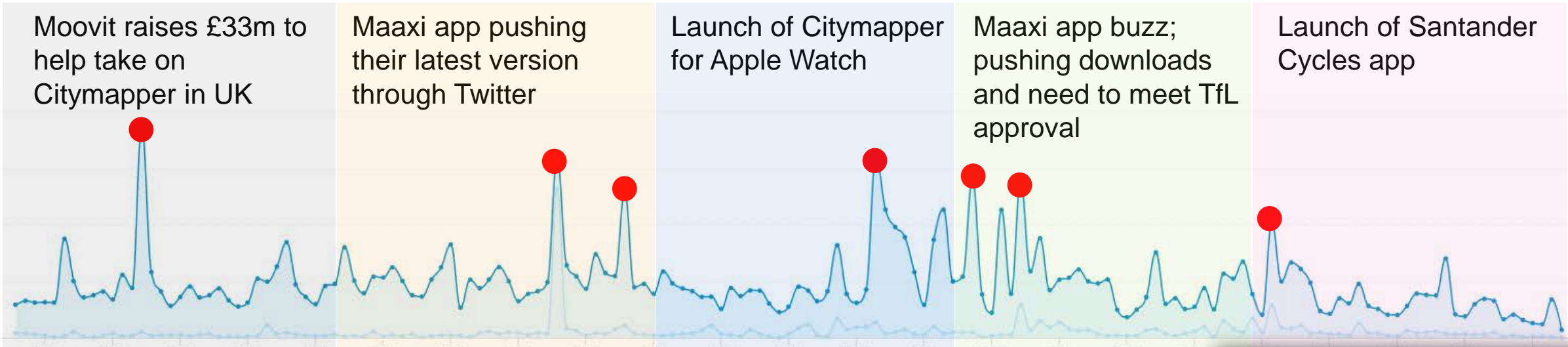
500,000 - 1,000,000 installs

*data is based on worldwide downloads – this has the biggest impact on Offi which is not well known as an app for transport in London



Social media and discourse analysis

There have been various 'events' throughout 2015 so far that have peaked discussion around transport apps on social media



Moovit raises £33m to help take on Citymapper in UK

Maaxi app pushing their latest version through Twitter

Launch of Citymapper for Apple Watch

Maaxi app buzz; pushing downloads and need to meet TfL approval

Launch of Santander Cycles app

moovit navigation app raises 33m to help it take on citymapper in uk #technology <http://t.co/5qo4JGBOdL>
Cyber Dystopia

Here's Citymapper for Apple Watch. medium.com/@Citymapper/ci...

London's cycle hire scheme finally gets an official iPhone app - 9 to 5 Mac (blog) bit.ly/1Ey8wXP

Maaxi Taxi @Maaxitaxi
Please download the newest Maaxi App and keep ON while we monitor driver hours/geo coverage. buff.ly/1FZ876B

So Maaxi app has had to meet TFL approval, changes made and finally their about to go live. Uber done nothing to their app for TFL. JOKE


Crazy stuff! Moovit Raises \$50M To Scale Its Public Trans App, Goes Up Against CityMapper flip.it/D5YnZ

Loop Design 31 March · 🌐
Citymapper app shows why Apple Watch will succeed. So much better than viewing on your phone. <https://t.co/mhEm6tDuBF>


Finextra news: Santander rolls out payments app for London bikes lnkd.in/eucHEi7

Launch of the apple watch sparked much discussion about compatible travel apps, particularly Citymapper and Moovit


March 27, 2015 43

 citymapper on apple watch <https://t.co/oAx1GWSHl8>
Citymapper 57


March 27, 2015 31

 citymapper on apple watch by @Citymapper <https://t.co/77e5SL7T4K>
Rob Winters 35


March 27, 2015 10

 citymapper is the best case I've seen yet for the apple watch <https://t.co/pgTa5bHxTZ>
Tommy Palmer 45

March 5, 2015 8

 smart public transit app moovit reveals apple watch and android wear apps <http://t.co/aw461Fm3KO>
#Wearables #IoT <http://t.co/hiVXPbv0WI>
Alexander Sommer 62

March 30, 2015 7

 citymapper just made me want an apple watch something apple hadn't managed yet <http://t.co/tAlQ5fH1XT>
Glyn Britton 50

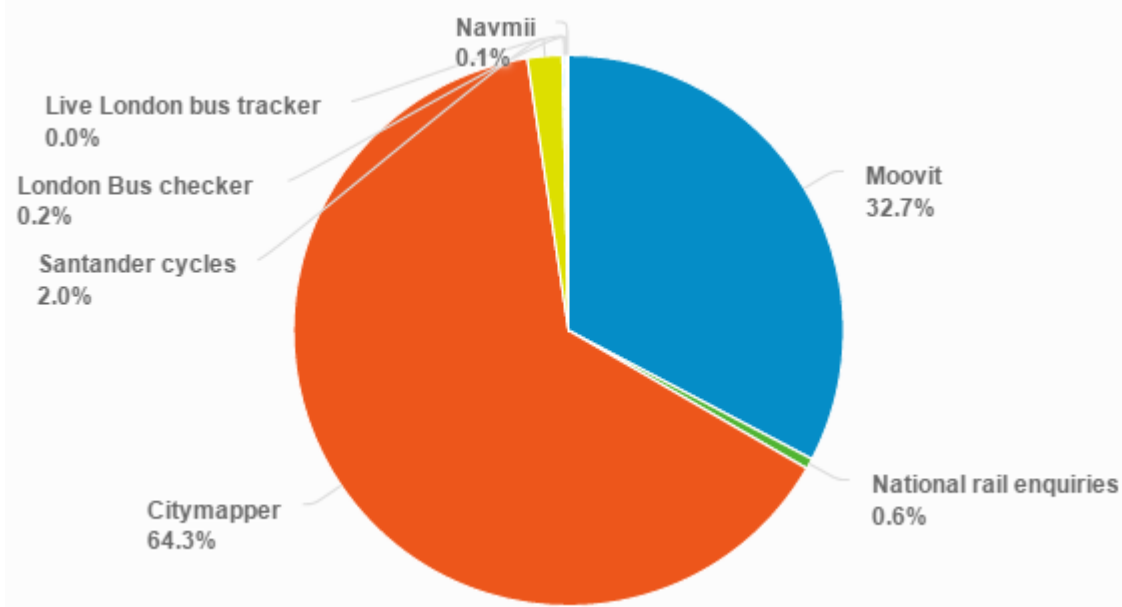


Developing an app that is compatible with wearable tech is future focussed and generates awareness / discussion among customers and experts

Citymapper has dominated the conversation

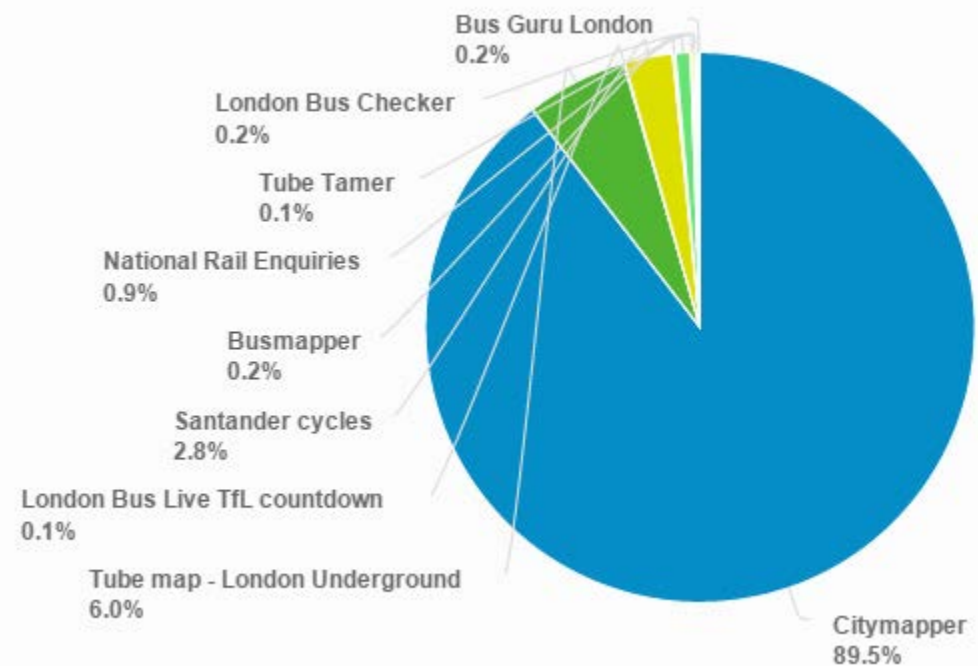
- There have been some key moments for Citymapper this year: launch of apple watch version, competition with Moovits £30m investment,
- Frequent mentions of praise for the app across all functionalities; journey planning, gamification (eg hoverboard), including Uber etc

Top Free Android Transport Apps - Mentions



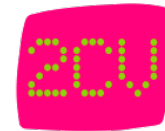
Reasonably sure that @citymapper has made a more meaningful impact on London commuters than @Hailo ever will.

Top Free IOS Transport Apps - Mentions



Of the tfl related apps around city mapper is in my opinion the most useful. It would help immensely however if it had an accessibility side to its awesome route planning. Giving step free routes.

There is a huge amount of positivity and gratitude for Citymapper



Reliable

Human TOV

Gamification

Trusted

Engaging

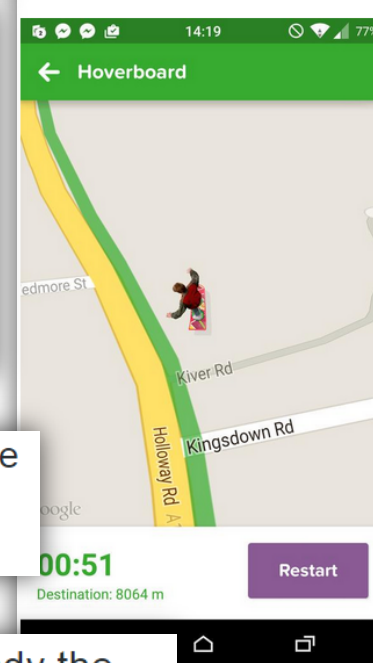
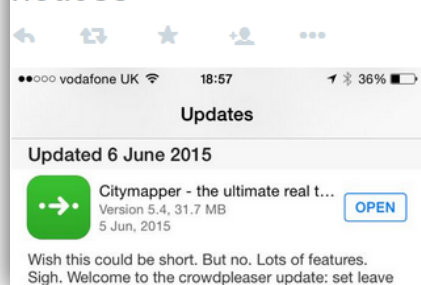
Two months in London and Citymapper continues to blow my mind.

reading the citymapper version update notes is one of my secret little pleasures in life

@HollieFerguson if you don't have the citymapper app get it. It's a lifesaver!

The CityMapper hover board game thing is a pretty sweet little app easter egg.

Citymapper really do have the best update notices



CityMapper has bants.



Citymapper is *dripping* with features these days. Rendered every other London travel app I'd installed redundant.

Oh Citymapper you're so funny.... Teleporter option...

Woo!! The CityMapper app is already the best out there, & they're adding Live Map of Buses just like featured on traintimes.org.uk/map/london-bus... site

Citymapper does what it does extremely well. If you're in London you'll never want to leave home without it.



Very positive sentiment average on social media

However the conversation is not always positive, with some users keen to air their frustrations online

- Even best in class apps like Citymapper have their pitfalls and users are talking about them:

CityMapper said it was a 30 minute walk but neglected to say it was uphill worst decision I've ever made

How can citymapper send me to a library that doesn't exist stupid app

Stupid citymapper told me to get off at Lancaster Gate, ran so fast in bloody heels, missed the... [instagram.com/p/zceV3jjqIK/](https://www.instagram.com/p/zceV3jjqIK/)

- 'Moaning' about apps and their features is a big part of the conversation online
- This is more detrimental to the apps that lack positive discussion to balance it out:



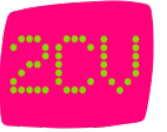
Very negative sentiment average on social media

[@Jam55king](#) [@mrgwa14](#) TFL had an app called Cabwise and it now doesn't work, wonder why?

[@MPSWestminster](#) [@MPSRTPC](#) [@TfL](#) pointed out 3 years ago, the CabWise app was flawed
Still hasn't been fixed
Why?

[@TootlestheTaxi](#) [@johnmason1970](#) [@UnitedCabbies](#) Cabwise is not a good app. We need posters and media presence.

Some customers think that TfL already have their own apps



- Users of these apps are attributing pain points directly to TfL

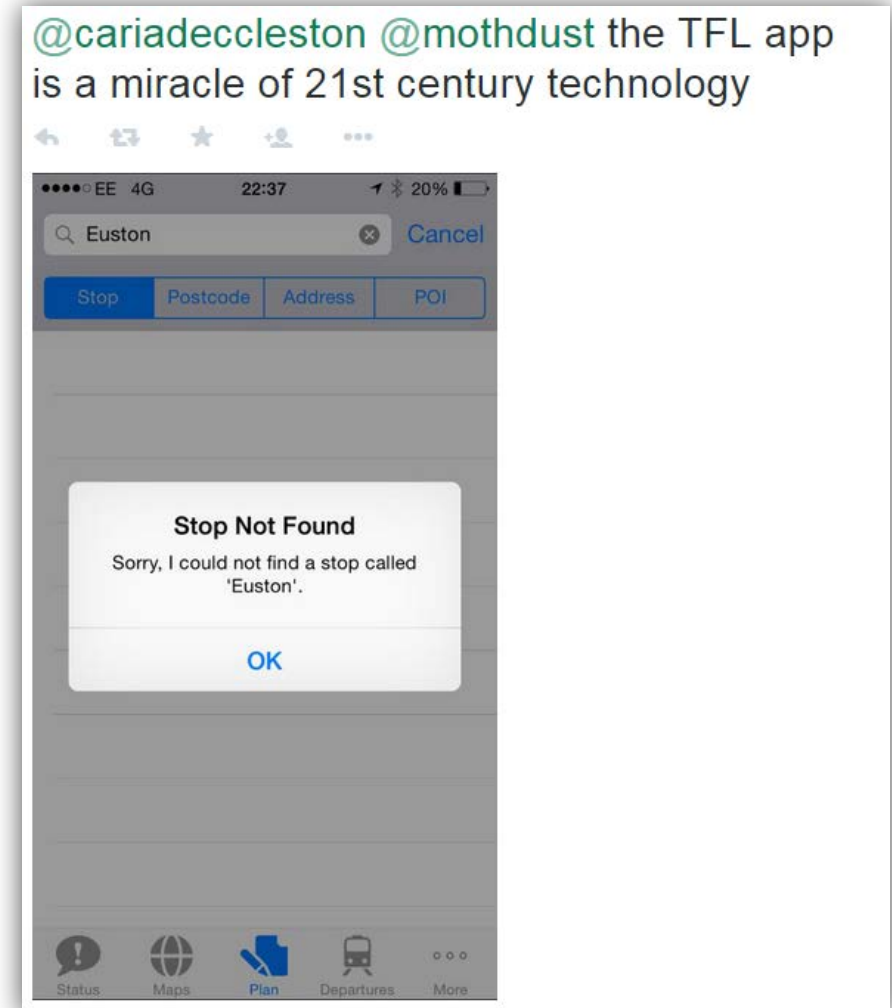
@texpatsabroad @paul_a_smith
@benhookway Yep. TFL app didn't inspire confidence of any sort in actual timings - just vague route. 1/2

📍 London, England

Wish the tfl app also told you who's on the bus so you'd know if you was gonna get screwed or not

The TFL App is about as intuitive as the controls of a hovercraft.

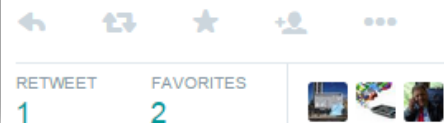
you know when u rush cos the tfl app says your bus is 2 mins away then u get there and youre still waiting for another 6 mins 😞





For those who are more familiar with ‘third party apps’, there is interest in TfL to creating their own

@TfL So since 'mobile' is so popular how about a proper TFL app for android and iOS? There are some great 3rd party ones already.



@Jam55king that's what we need TFL app that puts profit into subsidising taxi to keep it wheelchair accessible and then reduce fares

☹ CityMapper, aka ShittyMapper. Consistently bad. I'm going back to good old TFL. You need an app though!

@TfL makes sense, I already knew your travel data is used by the apps. Would be good to plug the oyster/accounts hole with an official app.

You know what would be live. A TFL app that shows which oncoming train has the most space in each carriage.

@GrumpyOtter @scottyfuller @SW7_Cab @peterjrose1 @AlexanderProud We have an economic imperative to demand a TfL app

It's foolish because you have millions of visitors in your website as because people doesn't have a choice of using app. They don't like to use the third party app because they prefer to have the information from the reliable source. Therefore I is essential for people to have a sophisticated app developed by tfl which make people's search easier.

Reply ↓

 Lorenzo on May 5, 2015 at 11:27 am said:

I fully agree with this guy!!!

Third party apps can take precedence over the TfL website

- Some customers are sharing their preference for other information sources besides TfL
- These users feel well served and no longer need to use the TfL website

😊 Moovit is such a good app for finding your way around on public transport I don't even bother with the TfL site anymore.

1d ago

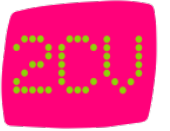
If I could only ever keep one **app** on my phone it would be [@Citymapper](#). It's amazing. (And frankly, the **TfL journey planner** is **rubbish**.)

[@Helzbels](#) [@Martin_Hoscik](#) go to citymapper first these days as they get the alert updates before the tfl website

If you live in London you should get the CityMapper **app**. Best journey planner I've used, no longer **need** the **TfL** site. bit.ly/NGrJSx

Dear **TfL**, I don't **want** to text a 12p/text no. to find out when my bus is. Please get your arse into the 21st Century and make a bleedin **app**!

Best in class travel apps – multi-modal



Expert review (simtravelexperts.com): *If you're going where Moovit exists, best download it before you go! You won't regret it. Public transportation can be tricky in a foreign place or new city. You could use trial and error for a few months until you become a savvy local, someone who knows the 450 line from Main Street is ALWAYS late... or you could download Moovit. Moovit is a public transportation app and it's darned, DARNED useful.*

I love the new @moovit app! So much easier

Winning features:

- **Omni Search:** See and compare the best route options, right now, to any address, Point Of Interest, line or station with ease
- **Near Me:** Explore your surroundings with our new Near Me features. Find the closest stations with active lines and even get alerts from the community about station conditions before you start your trip
- **Favourites:** Add your home, work and other favourite places for instant trip planning. See next arrival times for your favourite routes, and even check your trip history for easy repeat travels
- **En route:** Just a simple click will allow you control your journey, even if your plans or destination change. Just tap Start and you'll see your updated ETA and be notified as you go
- **Live reports:** Improve everyone's experience by reporting useful information about station crowdedness, cleanliness, live events, even incidents. Receive notifications from your local operator, when available. Planning your transport is easier when you know what to expect



Expert review (Laura Porter, London Travel Expert): *Citymapper is, quite simply, the best transport app available for London. There was a time when the TfL (Transport for London) Online Journey Planner was the best way to check a route across London's complex public transport network but Citymapper is so much better.*

Amazing @Citymapper now includes tube exits to reach destination quickest. A few more seconds shaved. I feel like an F1 driver round town.

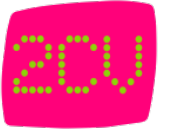
Winning features:

- **Comprehensive.** A to B journey planner including all transport modes (walk, tube, Overground, bus, cycle, taxi, rail, tram, DLR)
- **Real-time data.** Live info on all modes of transport where available
- **Full of features.** Disruptions/ status info, notifications, calories burned, tube map, saved routes, weather, Meet Me Somewhere.
- **Personalisation:** ability to tailor the app around your needs
- **Now supports Android Wear and Apple Watch,** alerting you about live tube disruptions on your Smartwatch.

Awards won:

- ★ Play Pick, Apps to Watch, Top Developer (Android, Play Store)
- ★ Best Overall Mobile App 2014 (Mobile World Congress/ GSMA)
- ★ Designs of the Year 2014 (London Design Museum)
- ★ Essential App of the Year (Stuff Magazine)

Best in class travel apps – single mode



Busmapper

Expert review (brokeinlondon.com): *If you are a regular user of London buses then you need to download the Busmapper app!*

@busmapper hey busmapper guys! we've put you in our latest blog about getting around london. Great app ;-) movb.us/JPceYJ

I LOVE @busmapper - BEST APP EVER

Winning features:

- **Live departures:** the app will list/map the closest bus stops to you and tell you when the next buses are due.
- **Route planning:** once you input your start and finish locations it will give you all the possible routes. Select the bus number(s) at the bottom of your screen to find out how long each option will take and where you will need to change buses.

High profile reviews:

- Apple's App of the Week, What's Hot, Staff Favourites.
- "Using Busmapper with live departure info is like having magical powers" - Sunday Times
- "Busmapper is a transport app that transport apps across the world should aspire to"- Frackulous



Tube Map
London
Underground

Expert review (imore.com): *This has been one of my own go-to apps for a long time now, partly because the developers have the exact same app available on the other mobile platforms, and partly because it has literally everything on hand to help you get around the Tube.*

The route planner in the Tube Map app is brilliant. My sporadic trips to London are now made much easier.

Winning features:

- Route anywhere in London. Places, postcodes, points of interest and tube stations.
- Walking Overlay - Station to station walking distance information overlaid onto the map.
- Tube Exits tells you which carriage to board so you're next to your platform or interchange exit point.
- The world's fastest route planner with line direction all shown on the map so you can track your journey.
- LIVE departure boards and station information.
- Notifications* can be activated to tell you when delays/closures occur on those lines important to you

High profile reviews / awards:

- Voted #26 in TechRadar.com's Top 80 best free iPhone apps 2013
- 2013 London Transport Awards Winner
- Apps Magazine says 'Tube Map gives you an advantage over the always-perilous London Underground for the grand price of nothing. A truly wonderful app' 5 Stars

There are range of apps that are successfully serving customers with accessibility challenges

- App developers place great importance on getting the stamp of approval from TfL, this is particularly true for accessibility
 - They value TfL and recognise that customers will gravitate towards this 'approval' from a trusted source
- In 2013, several apps won awards from TfL for accessibility - they still use this as a selling point today:



Description

** REALTIME BUS DEPARTURES ON YOUR PHONE! **
 ** Works in London (UK) and Auckland (NZ) **

** Winner of the Transport for London Accessible App competition! **

Best visually impaired app: London's Nearest Bus - This app allows the user to find the nearest buses and live departure times from their location. Users can also set individual bus alerts to trigger when a bus is due



AWARDS:

- TfL's Official "Best All Round App" for accessibility
- Featured by Apple multiple times
- 100s of 5-star reviews
- Most popular paid Tube App for iOS

Best all round app: Tube Tracker - A multi-modal app that finds the nearest station to the user with directions. Provides automatically updated live departure information, a journey planning function, first/last tubes and tube status alerts



"Tube nerds, prepare to swoon" - Time Out
 "Save time on the tube with the shortcuts app Station Master" - Evening Standard

Prize Winner of "Best App for Accessibility/Step Free Information" - TfL Accessible App Competition -
<https://www.tfl.gov.uk/info-for/media/press-releases/2013/december/tfl-announce-winners-of-accessible-app-competition>

Best app for accessibility/step free information: Station Master - This app offers detailed accessibility information for every London Underground, Overground and DLR station



Description

** Winner of TFL Accessible App Competition **
 ** Winner of 2014 Design 100 Award **

Judges' award: Colour Blind Tube Map - This app displays the London Underground map in various formats for easier viewing by people with all forms of colour blindness, and other vision impairments such as cataracts, loss of contrast sensitivity and hyperopia.

There is room for improvement for the more popular multi-modal apps like Citymapper

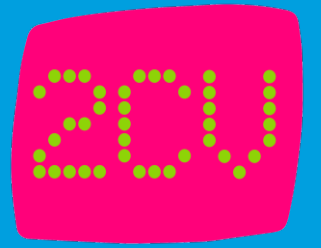
- Accessibility features seem to be more successful among apps that cater for one mode, particularly for the Tube
- There is a demand for the increasingly popular multi-modal apps like Citymapper and Moovit to incorporate more accessible routes / features – eg Step free access routes and better audio descriptions / labels

Of the tfl related apps around city mapper is in my opinion the most useful. It would help immensely however if it had an accessibility side to its awesome route planning. Giving step free routes.

Moovit accessibility expert review (applevis.com)

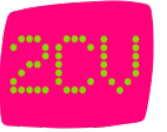


There are unlabeled buttons and settings parameters are not clearly announced by Voiceover.

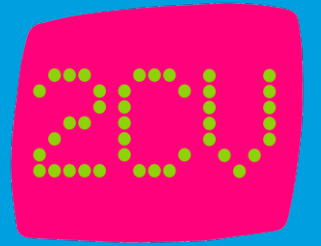


Summary

Key Findings



- There are **no obvious gaps** in the market as **customers feel well served** by a wide range of transport apps that deliver against their needs
- **Citymapper** is a **best in class** multi-modal app that has dominated discussions online in the travel app market
- There is some **misattribution of existing apps** (and their performance) **to TfL** which is having both a positive and negative impact on reputation
 - Problems with / **pain points & positives** from third party apps are attributed to TfL's
- There is **room for improvement** on current apps (including Citymapper) to **better meet the needs** of customers
- There is a **customer demand for more transport led apps**, but currently it is not entirely clear what these would look like
- **Some core features** for a 'model' travel app might include:
 - Multi-modal, 'near me' information, Real-time data, push notifications (particularly for delays/closures), live departures
 - Personalisation – ability to tailor the information eg set home / work / favourites
 - Flexibility - ability to plan ahead and en-route
 - Route options – needs based (eg accessibility), speed vs comfort vs weather proof vs no. of interchanges etc
 - Quality accessibility functions eg Voiceover

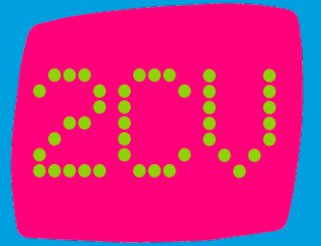


Thank you

Sammy.Warrens@2cv.com

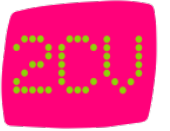
Africa.Munyama@2cv.xom

Please click on this link to access our
[Terms and Conditions](#)



Appendices

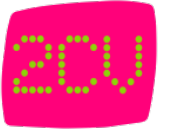
Top 20 apps – INSTALLS 100,000+



		Number installs		
		Modes	App name	# Installs
Ranking	1	Multi-modal	Moovit: Bus, Rail & Tube Info	5,000,000 - 10,000,000
	2	Multi-modal	Offi - Public Transport Buddy	1,000,000 - 5,000,000
	3	Tube	Tube map- London Underground	1,000,000 - 5,000,000
	4	Multi-modal	Citymapper: Bus, Tube, Rail	500,000 - 1,000,000
	5	Multi-modal	Transit App	500,000 - 1,000,000
	6	Bus	Bus Countdown	100,000 - 500,000
	7	Bus	Bus Guru Live London Bus Times	100,000 - 500,000
	8	Bus	Bus London Live Bus Time	100,000 - 500,000
	9	Bus	Live London Bus Tracker	100,000 - 500,000
	10	Bus	London Bus Checker Free: Times	100,000 - 500,000
	11	Bus	London Bus Live Countdown	100,000 - 500,000
	12	Bus	London Live Bus Countdown	100,000 - 500,000

		Number installs		
		Modes	App name	# Installs
Ranking	13	Bus	London Live Bus Countdown	100,000 - 500,000
	14	Bus	UK Bus Checker	100,000 - 500,000
	15	Bus	UK Bus Time Live: Bus Scout	100,000 - 500,000
	16	Fares	London Oyster Balance	100,000 - 500,000
	17	Multi-modal	London Transport Planner	100,000 - 500,000
	18	Multi-modal	London Travel	100,000 - 500,000
	19	Multi-modal	Pubtran London	100,000 - 500,000
	20	Multi-modal	TripGo, real time trip planner	100,000 - 500,000

Top performing apps – CUSTOMER SATISFACTION SCORE 5/5



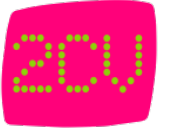
Features in top score AND installs

	Modes	App name	Rating
1	Bus	BusMate London- LIVE bus times and reminders	5
2	Bus	Bustle	5
3	Bus	Dubbledecker	5
4	Bus	London 2012 Travel Suite	5
5	Bus	London Live Bus Map	5
6	Bus	Next Bus Arrivals London	5
7	Cycle	London Bike Master	5
8	Cycle	World Bikes	5
9	Multi-modal	A+ London Trip Planner	5
10	Multi-modal	A-to-B Easy London Transport	5
11	Multi-modal	CityMapper - London Transport	5
12	Multi-modal	London Transport Planner Pro	5
13	Multi-modal	London Travel Live	5
14	Multi-modal	Transit London	5

	Modes	App name	Rating
15	Multi-modal	TubeBusBike	5
16	Roads	Traffic Eye	5
17	Tube	Commuter Pal	5
18	Tube	Lines- tube status	5
19	Tube	Live London Tube Tracker	5
20	Tube	London Underground - map and route planner by Zuti	5
21	Tube	London Underground Tube Status	5
22	Tube	Station Master • London Tube (Underground), Overground & Docklands Light Railway (DLR) Accessibility & Step-Free Information • Award-Winning Transport App	5
23	Tube	TFL Underground/ Tube Service	5
24	Tube	Tube alerts	5
25	Tube	Tube Appy Free	5
26	Tube	Tube mate	5
26	Tube	Tube mate free	5

Number of platforms

N=361 Travel apps



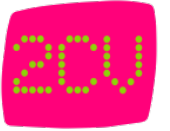
All apps – Number of platforms available per app

		Year	
		2013	2014
No. of platforms	1	144	252
	2	19	41
	3	4	5
	4	0	3

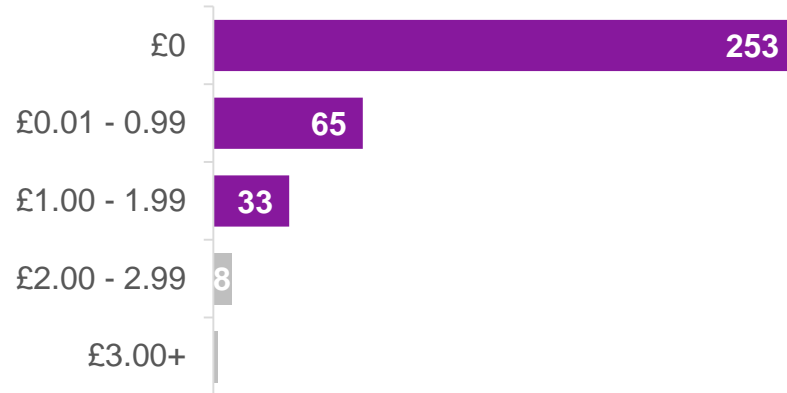
Still a **focus on developing single platform apps** – only a small minority are available on 2+

Number of apps by PRICE

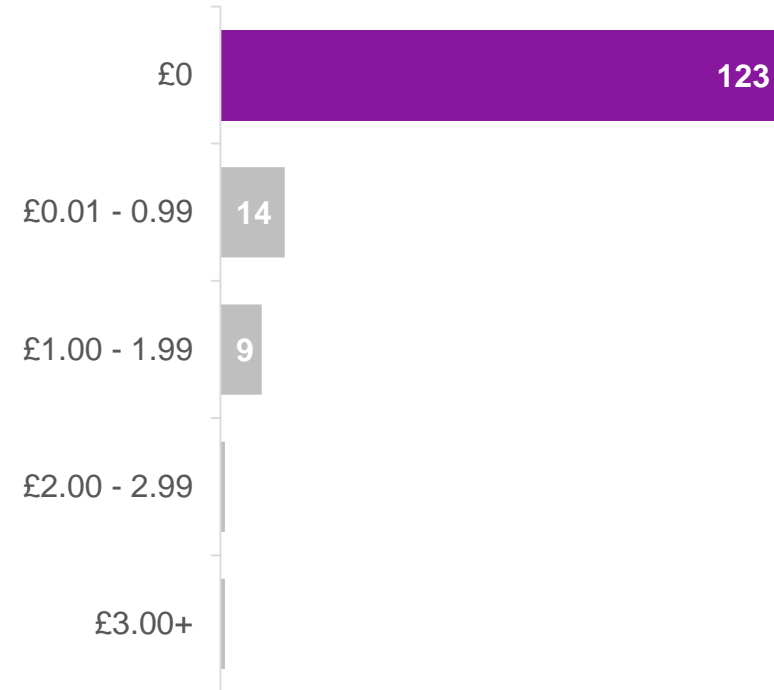
N=361 Travel apps
N= 148 50+ installs



All apps – cost of apps



Apps with 50+ downloads – cost of apps

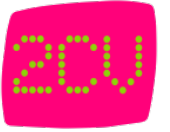


The majority of travel apps are **free of charge** – only very few are more than 99p

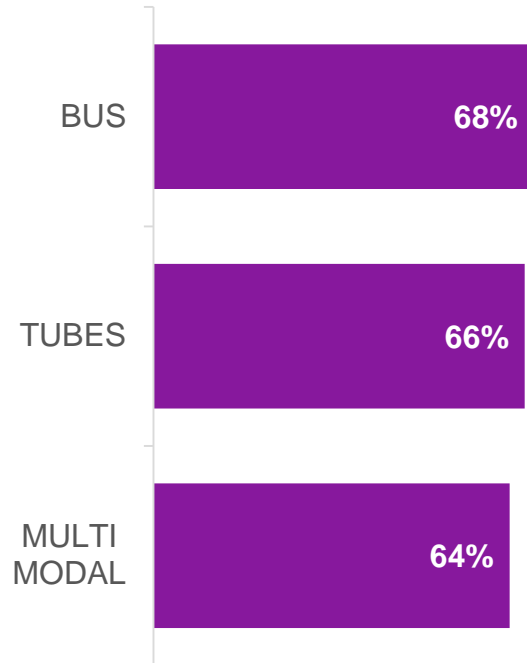
Consistent with the overall data, when filtering on apps with 50+ downloads we also see the majority are free apps

Satisfaction scores by MODE

N=361 Travel apps
N= 148 50+ installs

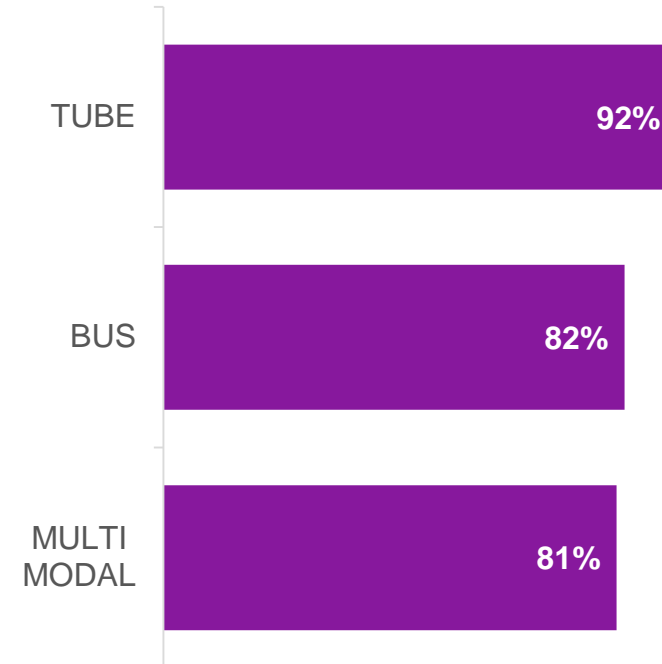


All apps – ratings of 4/5 on customer satisfaction



At a **total level**, there is **not much discrimination** between levels of customer satisfaction with the apps across modes

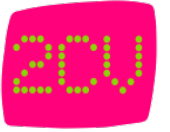
Apps with 50+ downloads – ratings of 4/5 on customer satisfaction



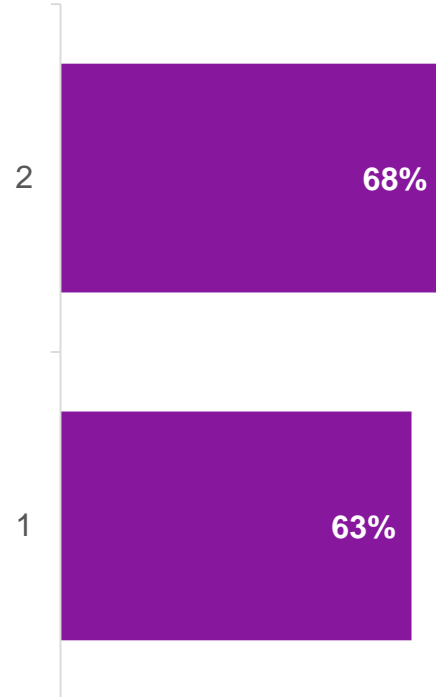
When we **filter on apps that have 50+ downloads** we see that customer satisfaction is **much higher across all modes**. We also see more discrimination - **tube apps most successful overall**

Satisfaction scores by NUMBER OF PLATFORMS

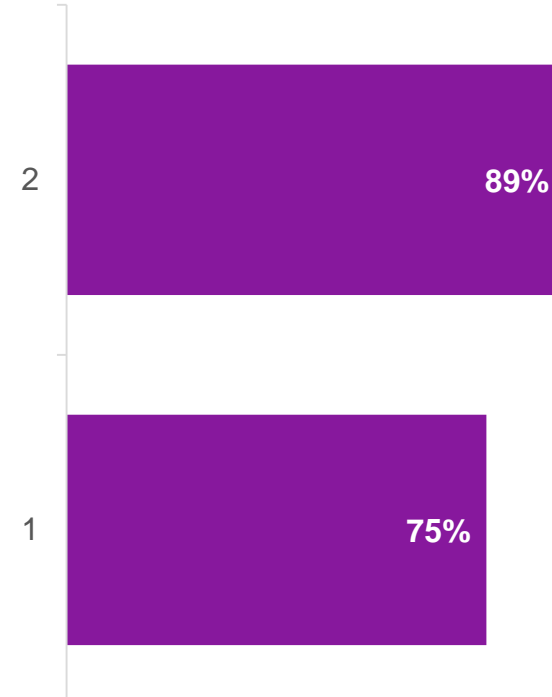
N=361 Travel apps
N= 148 50+ installs



All apps – ratings of 4/5 on customer satisfaction by number of platforms



Apps with 50+ downloads – ratings of 4/5 on customer satisfaction by number of platforms



At a total level **we do not see a difference between apps with multi-platform capabilities** and levels of customer satisfaction

When filtering on apps with 50+ downloads we see that **multi-platform apps have higher levels of satisfaction**