



Communication Choices

A segmentation report on communication methods
used by UK consumers

Research Document

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Section 1

Executive summary

1.1. Background to the research and segmentation

We commissioned research in February 2012 to understand the breadth of communication methods used by UK adults to interact with others. This included understanding their preference for particular forms of communication depending on the circumstance: with friends and family or with businesses.

A range of different ways of communicating were investigated, including meeting face to face, using voice calls on fixed landline or on mobile phones, text messaging, emailing, instant messaging, social networking and postal correspondence. A summary of the research was published as part of the *Communications Market Report 2012*¹ and showed that digital communications are now widely used alongside traditional methods. Overall, while consumers say they prefer to communicate face to face on a daily basis, texting is the communication they actually use most with friends and family.

This report aims to complement the high-level findings by outlining how the UK consumer population can be segmented into five distinct groups according to their attitudes to and usage of different digital and traditional communication methods, whether communicating with family, friends or businesses. By providing an insight into the communication preferences and tendencies of the population, the research offers an opportunity to dissect 'the consumer' into more specific groups of people who share similar attitudes and behaviours. Overall, the findings provide an attitudinal dimension to Ofcom's existing work in understanding consumer behaviour in relation to different communication methods.

The following section provides a snapshot of each of the five segments that have been identified.

1.2. Overview of the five segments

We identified five groups: 'always-on' communicators, 'enlightened' communicators, 'middle of the road' communicators, 'conventional' communicators and 'detached' communicators. These can broadly be defined by their frequency of communication and the extent to which they use new technologies to communicate (see Figure 1.1 below). Comparing each group with the overall population, we found distinct attitudes to, and patterns of use of, communication devices (see Figure 1.2 below).

'Always-on' communicators (22% of all adults)

As the name suggests, 'always-on' communicators are those who communicate a lot, especially with their friends and family, and use a wide range of new technological methods to communicate. These are the youngest group with the greatest proportion still in education and are more likely than the general population to own a mobile phone and have access to a computer. In particular, they are avid users of their mobile phone, using it primarily to send text messages but also to call their friends and family.

¹ Ofcom *Communications Market Report 2012*:
http://stakeholders.ofcom.org.uk/binaries/research/cmr/cmr12/UK_1.pdf

Those who use social media for keeping in touch are also more likely to be 'always on' communicators and are much more comfortable than the general population sharing information with a wide group of people over the internet.

People in this group are also more likely to use newer forms of communication such as Twitter or VoIP to keep in touch with their family and wider social circle, although these are still minority activities.

'Enlightened' communicators (19% of all adults)

Enlightened communicators are also a younger group who communicate a lot, though are more likely to be working and in higher social grades than the 'always-on' group. They like to keep up with technology and as a result are more likely than the general population to think of themselves as being knowledgeable about the internet, and are the most careful about sharing personal information online.

Technology plays a key role in the communication choices for this group. They are more likely than the general population to own a computer and a mobile phone and use these to keep in contact with friends and family, using texting or mobile calls (or emailing in particular). They say that their use of email to keep in touch with people has increased dramatically over the past couple of years and they expect to use it even more in the future. Social networking sites are also a key communication channel for this group, compared to the overall population.

'Middle-of-the-road' communicators (22% of all adults)

Middle-of-the-road communicators are more in line with the general population in terms of the frequency with which they communicate. They use a variety of traditional and newer ways of keeping in touch, with mobile calls, text messages and post the most used. They prefer traditional methods to automated services when contacting businesses..

They are most likely to be hesitant about sharing personal opinions over social media such as Twitter, and say that they often "let others try out new services first before giving them a go themselves".

'Conventional' communicators (21% of all adults)

Conventional communicators are the oldest group; they are more likely than the general population to be retired and live on their own.

This group communicates least frequently with others, is the least likely to have embraced new technology and the least likely of all the segments to have access to a computer, or to own a mobile phone. They tend to use the more traditional methods of communication such as landline calls and post, and are more likely than the overall population to own a fixed landline. On special occasions such as birthdays, conventional communicators are the most likely to send a card or present in the post.

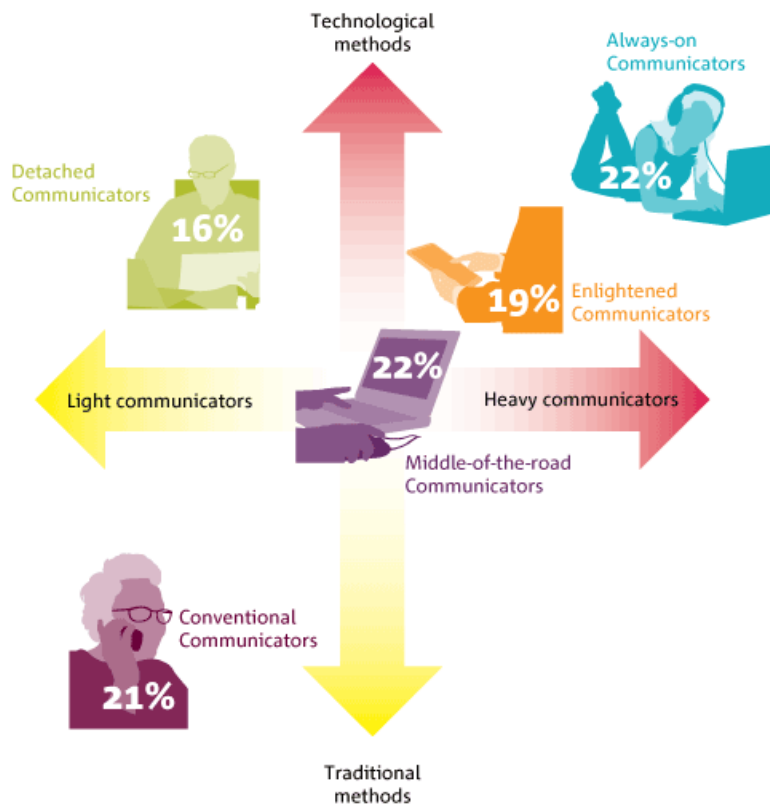
'Detached' communicators (16% of all adults)

Communicating with others is not a priority for this group: they communicate less frequently than the overall population and they don't have strong opinions on any of the attitudinal statements regarding ways of communicating. Their main method of keeping in touch with friends or family on a daily basis is using text messages, and given the choice, they are the least likely of all of the segments to choose to communicate face to face.

While this group may not have particular views on communication methods, their usage patterns suggest that they are more likely to use newer, quick-form text methods of

communication, such as Twitter or instant messaging, than the overall population, although these are still minority activities.

Figure 1.1: Illustration of segments, by communication method and propensity to communicate



Source: Ofcom research, fieldwork carried out by Kantar Media February/March 2012 (Base: All UK adults aged 16+ (n=2,012 aged 16+, 440 Always-on communicators, 373 Enlightened communicators, 450 Middle-of-the-road communicators, 320 Detached communicators, 429 Conventional communicators))

Figure 1.2 outlines distinct attitudes to, and use of, communication devices for each group when compared to the overall population. (The actual use of each method is shown in figure 2.3 and the level of agreement with each attitudinal statement in figure 5.1.)

Figure 1.2: Summary of attitudes towards, and use of, communication methods

Compared to the overall population	'Always on' communicators	'Enlightened' communicators	'Middle-of-the-road' communicators	'Conventional' communicators	Detached communicators
More likely to be...	Young and still in education	Young, male working and ABC1	Aged 35-54	Older, female, living on their own and retired	Male, C2DE
More likely to communicate by...	Micro-blogging (e.g. Twitter)	Social Networking	Emailing/ Texting	Landline calls	Micro-blogging (e.g. Twitter)
Less likely to communicate by...	Landline calls	Post	Micro-blogging (e.g. Twitter)	Micro-blogging (e.g. Twitter)	Text messaging
More likely to say...	I am happy to post messages online that a wide audience can see	I know more about the internet than most people I know	I think e-cards are impersonal	I find technology advances too quickly for me to keep up	Automated services have made communications with businesses easier
Less likely to say...	I think e-cards are impersonal	I find technology advances too quickly for me to keep up	I don't think about the cost when using communication methods, I just use the most convenient	I know more about the internet than most people I know	I communicate with my friends a lot

Source: Ofcom research, fieldwork carried out by Kantar Media February/March 2012

Figures for each segment within each category have been indexed against the figures for the overall population

Section 2

Communication choices segmentation

2.1. Introduction

With the developments in digital technology and growth in take-up of different devices, there are now many more ways in which people can choose to communicate with one another. For example, Ofcom's *Communications Market Report 2012*² highlighted the fact that smartphone ownership rose to 39% of UK adults in Q1 2012, up 12 percentage points on 2011. In the same period, 80% of UK households had home internet access.

This report provides an overview of the communication choices people make, depending on their attitudes to digital technology and the different circumstances in which they need to communicate.

2.2. Research methodology and analysis

We commissioned quantitative research in February 2012 to understand the communication choices people make on a daily and weekly basis. In total, 2,012 adults aged 16+ from across the UK were interviewed using a face-to-face omnibus with a nationally representative sample.

A summary of the findings of this research was published as part of the *Communications Market Report 2012*. This report provides additional analysis, focusing on five segments that have been identified, based on differences in attitudes and behaviours relating to communication preferences and technology take-up.

2.3. Segmentation overview

Segmentation involves the subdivision of a population into discrete groups sharing similar characteristics³. This particular segmentation used responses to questions about people's use of communication methods, and their attitudes towards technology in relation to communicating with friends and families, and with businesses. See Annex 1 for the technical specification.

3.3.1 Frequency of communication and methods used

Figure 2.1 illustrates the five segments that were identified in relation to their use of communication, and which can broadly be defined by their frequency of communication and the extent to which they use new technological methods to communicate.

'Always on' communicators and 'enlightened' communicators account for just over two-fifths of the population (41%). These groups communicate with others on a regular basis and tend to use technological devices, although they differ in terms of their demographic composition.

'Detached' communicators and 'middle-of-the-road' communicators account for just under 40% of the population. Although both groups use new technologies they tend to communicate less frequently than the 'always-on' and 'enlightened' communicators.

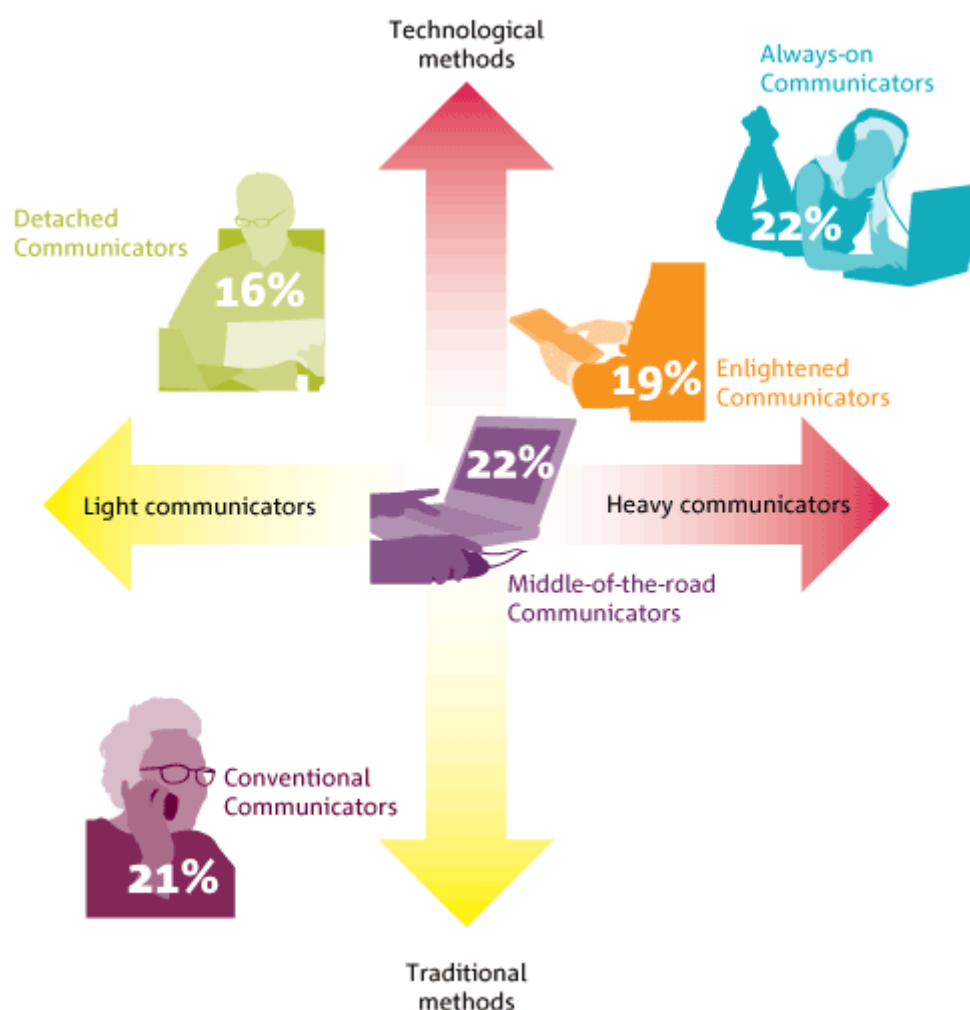
² *Communications Market Report 2012*:

http://stakeholders.ofcom.org.uk/binaries/research/cmr/cmr12/UK_1.pdf

³ Segmentation performed using k-means cluster analysis

The final group is the 'conventional' communicators (21%), who tend to communicate less frequently than the others and prefer to use more traditional methods.

Figure 2.1: Illustration of segments identified by communication method and propensity to communicate



Source: Ofcom research, fieldwork carried out by Kantar Media February/March 2012
 Base: All UK adults aged 16+ (n=2,012 aged 16+, 440 Always-on communicators, 373 Enlightened communicators, 450 Middle-of-the-road communicators, 320 Detached communicators, 429 Conventional communicators)

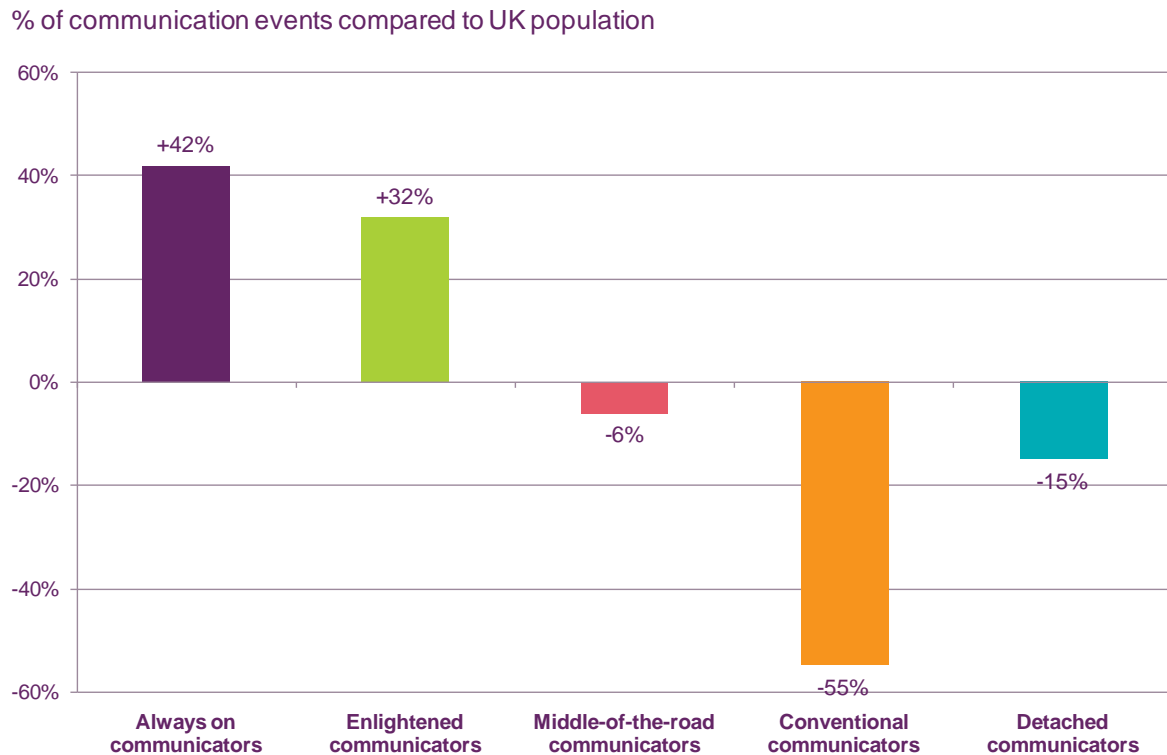
We have estimated the overall frequency of communication activity across all the devices used, and including communication with friends/family and businesses, in order to provide an overview of the regularity with which each segment communicates⁴.

Figure 2.2 shows in more detail the frequency of communication instances for each segment relative to the overall UK population. 'Always on' communicators and 'enlightened' communicators connect with others more often than the overall adult population, with 42% more events for 'always-on' and 32% for 'enlightened'.

'Conventional' communicators communicate the least frequently, with 55% fewer communication occasions compared to the overall population.

⁴ Frequencies calculated by applying an estimated yearly number to each frequency code

Figure 2.2: Frequency of communication occasions for each segment compared to UK population



Source: Ofcom research, 2012

Base: All UK adults (n=2,012 aged 16+, 440 Always-on communicators, 373 Enlightened communicators, 450 Middle-of-the-road communicators, 320 Detached communicators, 429 Conventional communicators)

3.3.2 Communication devices/services used

For all respondents, regardless of segment, face-to-face is the most used form of communication in terms of 'ever used'; whether to stay in touch with family and friends or communicate with businesses. Figure 2.3 shows the level of use of communication devices and services by each segment and how each compares to the overall population.

For 'always-on' communicators and 'enlightened' communicators, text messaging is the most-used method; 90% of each of these segments claim to have 'ever' used this way of communicating, despite being ranked third overall, at 76% of all adults.

Landline calls are used most by 'conventional' communicators: 73% compared to 68% of all adults. This group is the least likely to use any computer-based form of communication.

'Detached' communicators are less likely than the overall population to use mobile (75%) or landline voice calls (64%), but are more likely to use quick-form text-based methods such as micro-blogging (like Twitter) (19%) or instant messaging (47%).

'Middle-of-the-road' communicators are more likely than the overall population to use both traditional and relatively well-established technological methods of communication. For example, 85% use text and a similar proportion make mobile phone calls, while 73% email.

Figure 2.3: Communication devices/services ever used, by segment

		UK population	Always on communicators	Enlightened communicators	Middle-of-the-road communicators	Conventional communicators	Detached communicators
Post	% ever use	82	78	82	87	82	77
	Indexed against UK pop'n	100	95	100	106	100	94
Mobile - voice	% ever use	79	88	90	85	55	75
	Indexed against UK pop'n	100	111	114	108	70	95
Text messages	% ever use	76	90	90	85	42	70
	Indexed against UK pop'n	100	118	118	112	55	92
Landline - voice	% ever use	68	61	70	71	73	64
	Indexed against UK pop'n	100	90	103	104	107	94
Emails	% ever use	65	81	87	73	23	65
	Indexed against UK pop'n	100	125	134	112	35	100
Social networks	% ever use	45	66	62	45	8	43
	Indexed against UK pop'n	100	147	138	100	18	96
Instant messages	% ever use	43	65	58	41	8	47
	Indexed against UK pop'n	100	151	135	95	19	109
VoIP	% ever use	31	45	40	33	7	36
	Indexed against UK pop'n	100	145	129	106	23	116
Website comments	% ever use	30	44	39	29	6	30
	Indexed against UK pop'n	100	147	130	97	20	100
Micro-blogging	% ever use	16	28	21	11	1	19
	Indexed against UK pop'n	100	175	131	69	6	119

Source: Ofcom research, 2012

Q2A/2B: Ever use device/service to communicate with services/businesses or family and friends

Base: All UK adults (n=2,012 aged 16+, 440 Always-on communicators, 373 Enlightened communicators, 450 Middle-of-the-road communicators, 320 Detached communicators, 429 Conventional communicators)

Table ranked by UK population

The colour-coded indices highlight the variance in usage of each communication device relative to the UK population

3.3.3 Demographic differences

In addition to communication behaviours and attitudes, there are demographic differences between the groups. Figures 2.4 and 2.5 compare the five segments by age, gender, socio-economic group and working status.

‘Always-on’ communicators are the youngest segment; 24% are aged under 25, compared with 14% of all adults. Thirty-seven per cent of all 16-24 year olds are ‘always-on’ communicators, so this group has the highest proportion of those who are in education (14%).

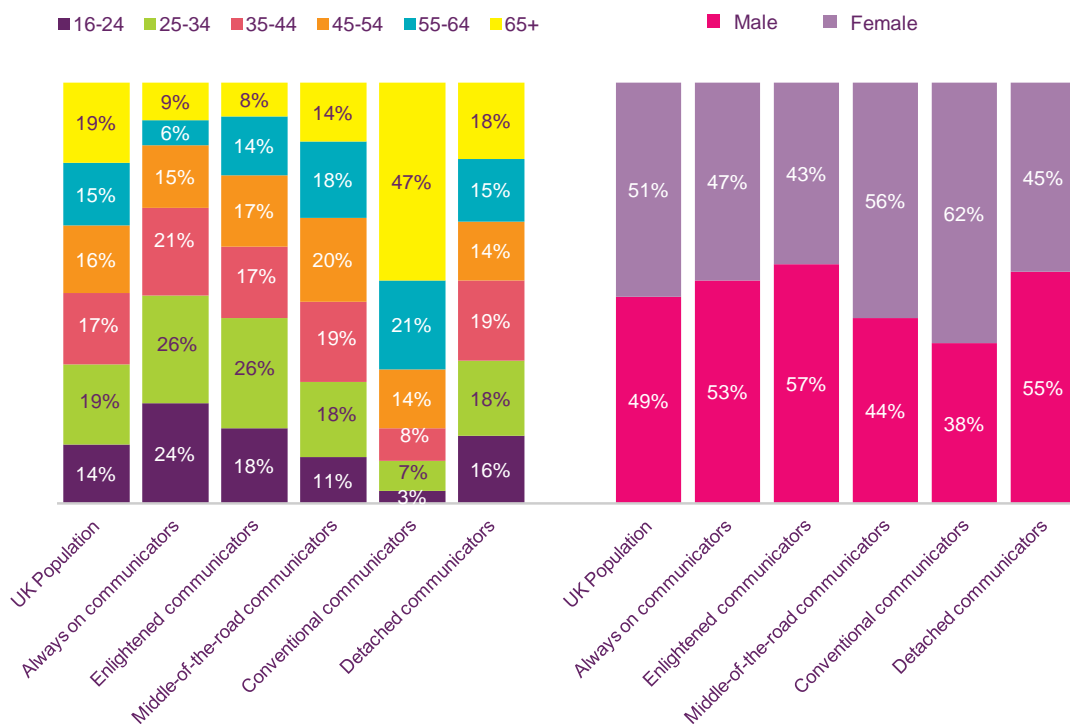
‘Enlightened’ communicators are also a younger group, with almost a fifth (18%) aged 16-24. This group shows a skew towards males (57% vs. 43% female) and almost two-thirds (65%) of the group work either full or part-time, compared to 52% of all adults. They are also more likely to be in ABC1 socio-economic groups (66% vs. 50% of all adults). Eighty-four per cent of this segment live in multi-person households, compared to 75% of the general population.

‘Middle-of-the-road’ communicators are more in line with the overall population, although they are slightly skewed toward female (56% vs. 51% of all adults) and contain a greater proportion of people aged 35-54 compared to the general population (46% vs. 33% of all adults).

‘Detached’ communicators are more likely to be male, compared to the overall population (55% vs. 49% of all adults) and more likely to be in C2DE socio-economic groups (57% vs. 50% of all adults).

‘Conventional’ communicators are the oldest segment, with 68% aged over 55, compared to 34% of all adults; 60% of all people in this age group are ‘conventional’ communicators. As a consequence, over half (53%) of this group are retired, compared to just under a quarter (23%) of all adults. This group is the most likely to be female, at 62% compared to 51% of all adults. They are also more likely to live alone (38% vs. 25% of all adults).

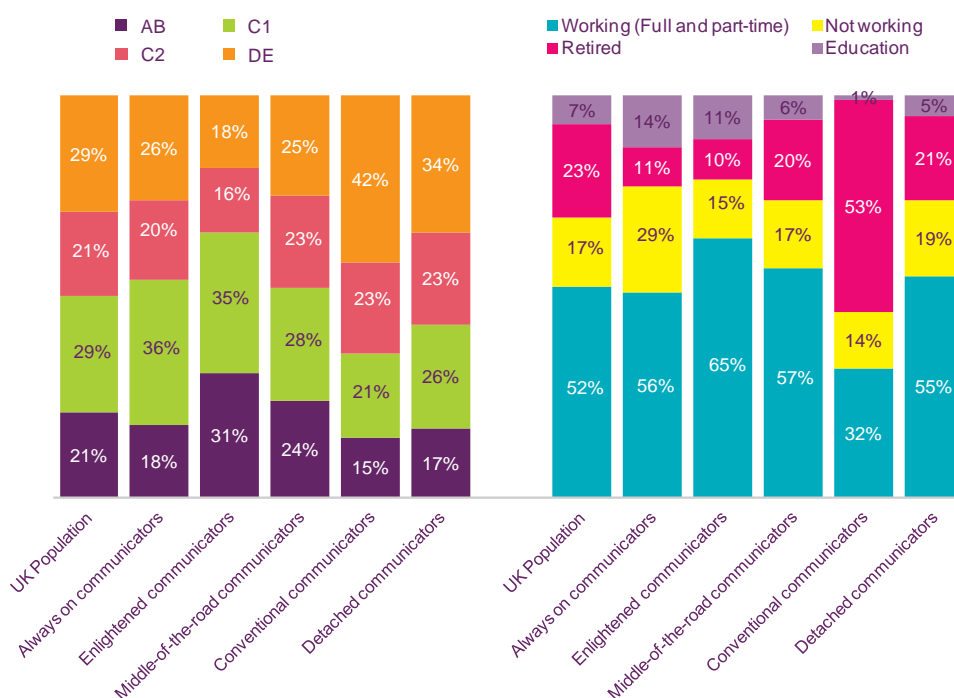
Figure 2.4: Demographic profile of each segment, by age and gender



Source: Ofcom research, 2012

Base: All UK adults (n=2,012 aged 16+, 440 Always-on communicators, 373 Enlightened communicators, 450 Middle-of-the-road communicators, 320 Detached communicators, 429 Conventional communicators)

Figure 2.5: Demographic profile of each segment, by socio-economic group and working status



Source: Ofcom research, 2012

Base: All UK adults (n=2,012 aged 16+, 440 Always-on communicators, 373 Enlightened communicators, 450 Middle-of-the-road communicators, 320 Detached communicators, 429 Conventional communicators)

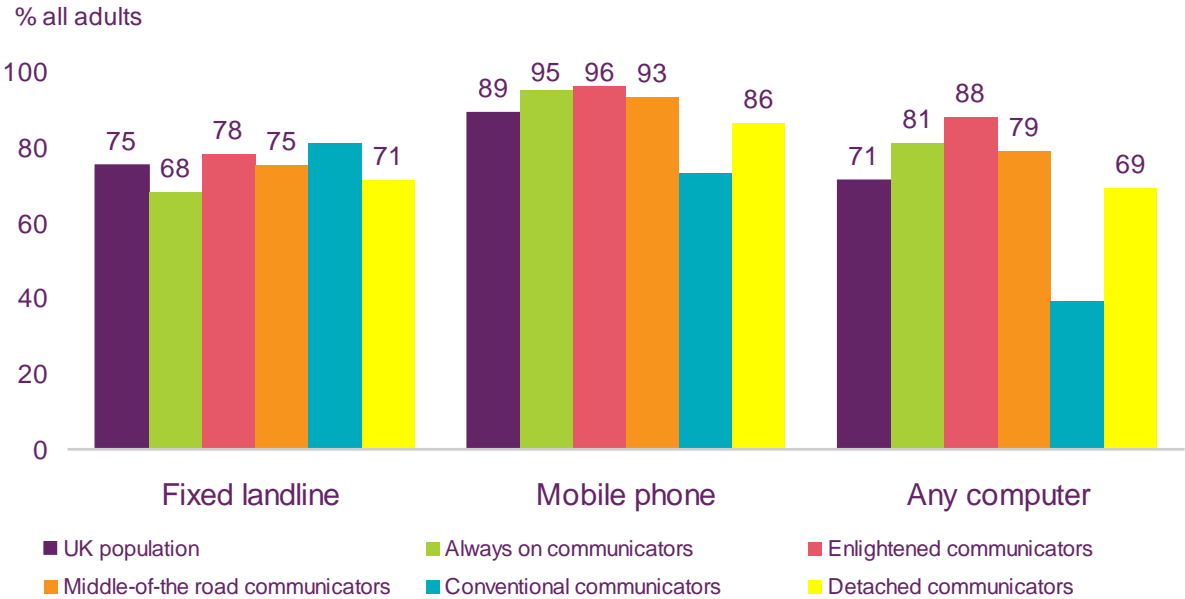
2.4. Communication technology ownership

In order to understand the communication choices people make, we asked about their ownership of key communication technology devices and services. Figure 2.6 shows that ‘conventional’ communicators are more likely than the other segments and than the population as a whole (81% vs. 75% of all adults) to have a fixed landline telephone, and ‘always on’ communicators are the least likely, with just 68% of this group claiming to have a fixed landline telephone.

‘Conventional’ communicators are also the least likely to own a mobile phone, at just 73% compared to 89% of all adults. ‘Enlightened’ communicators and ‘always-on’ communicators are the most likely to own a mobile phone, at 96% and 95% respectively.

‘Enlightened’ communicators are also the most likely to own a computer, at 88% compared to just under two-fifths (39%) of ‘conventional’ communicators and 71% of all adults.

Figure 2.6: Ownership of devices and services used for communication



Source: Ofcom research, 2012
 Q1: Which of these devices or services do you have?
 Base: All UK adult (n=2012 aged 16+, 440 Always-on communicators, 373 Enlightened communicators, 450 Middle-of-the-road communicators, 320 Detached communicators, 429 Conventional communicators)

Section 3

Communicating with friends and family

3.1. Introduction

There are a number of different ways in which people can choose to communicate with others, including meeting face-to-face, calling on the telephone (landline or mobile), sending a text message or an email, other internet means, and the postal service. In order to understand whether communication choices are influenced by circumstances, we asked people about their communication choices for friends and family as well as with businesses and services.

This section focuses on how the segments compare in their communication choices for friends and family, and Section 4 considers communication with businesses and services.

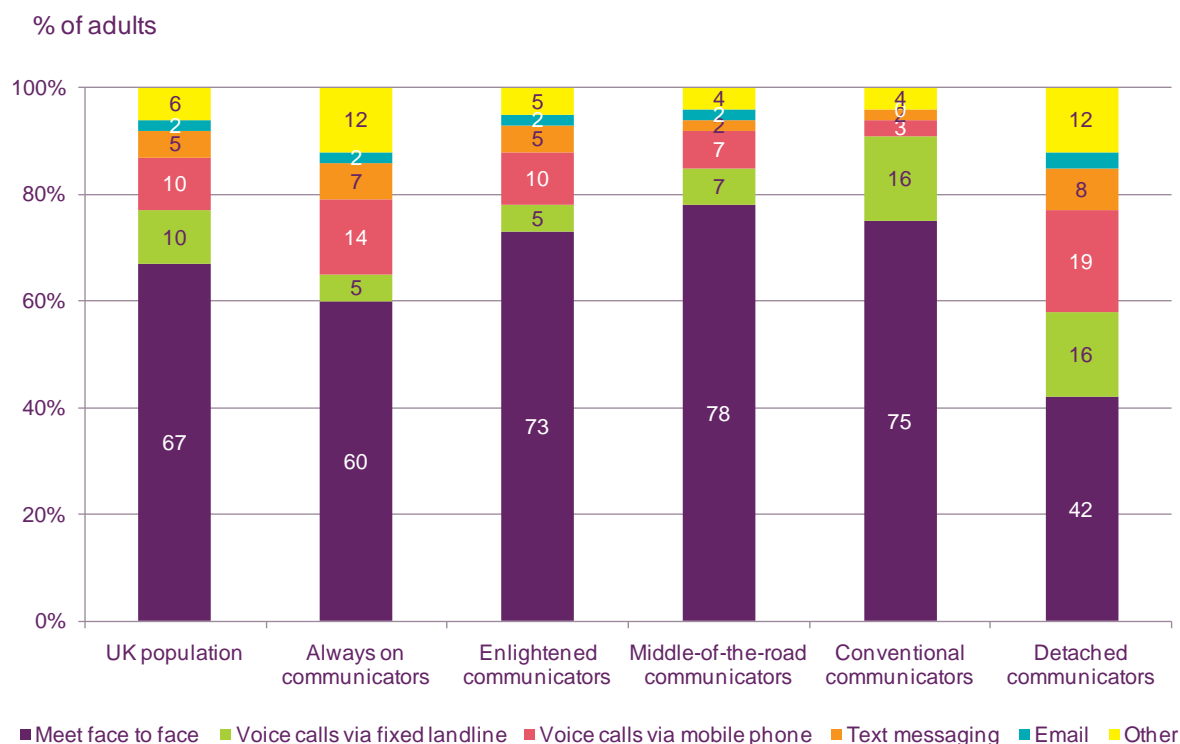
3.2. Preferred methods of communication with friends and family

When asked to pick just one way of communicating with friends and family, meeting face-to-face is by far the most preferred, with two-thirds (67%) of adults choosing this method., Detached communicators are the least likely to choose face-to-face meetings, at 42% compared to 78% of 'middle-of-the-road' communicators, who are the most likely to prefer this form of communication with friends and family.

'Detached' communicators are the most likely to choose voice calls on mobiles, with almost a fifth (19%) selecting this as their preferred method in this context, compared to 10% of all adults and just 3% of 'conventional' communicators.

'Detached' communicators and 'conventional' communicators are the segments most likely to choose to call friends and family via a fixed landline telephone, with 16% of each group choosing this option (if they could pick only one). This compares to one in ten (10%) of all adults and just 5% of 'enlightened' communicators and 'always-on' communicators.

Figure 3.1: Top preferred methods of communicating with friends and family, by segment



Source: Ofcom research, 2012

Q5a: If you had to pick one method of communicating with friends and family which one would it be?
 Base: All who ever use at least one form of communication: Friends and family, (n=2006 aged 16+, 440 Always-on communicators, 373 Enlightened communicators, 450 Middle-of-the-road communicators, 317 Detached communicators, 426 Conventional communicators)
 Only communication methods used by over 1% of the overall population are highlighted.

3.3. Frequency of using different methods with friends and family

In addition to their preferred method, respondents were asked which methods they *actually use at least once a day* to communicate with friends and family. Figure 3.2 shows that, overall, text messages are the most widely-used method in this context, with 58% of adults contacting friends and family this way. As the ones who tend to communicate the most, this is particularly driven by ‘always-on’ communicators and ‘enlightened’ communicators, with 77% and 72% respectively using text messaging on a daily basis to communicate with friends and family. In contrast, only 28% of ‘conventional’ communicators use text messaging each day to keep in touch with friends and family.

Face-to-face contact is the method used most regularly by ‘conventional’ communicators, with 45% communicating this way with friends and family each day, compared to 49% of all adults. The group least likely to meet face to face on a daily basis with friends and family is the ‘detached’ communicators, with 29%.

‘Conventional’ communicators are more likely than any of the other segments to use fixed landline voice calls on a daily basis with friends and family’ with 35% compared to 29% of all adults. Less than one in four (24%) ‘detached’ communicators use fixed landline calls to catch up with friends and family every day.

Figure 3.2: Methods used on a daily basis to communicate with friends and family

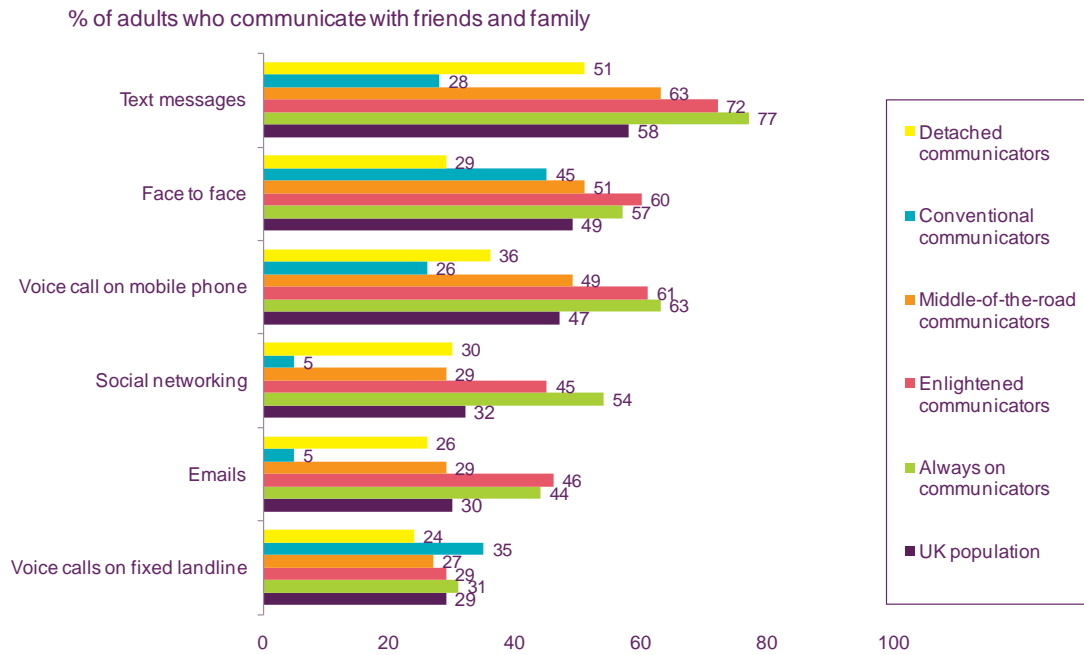
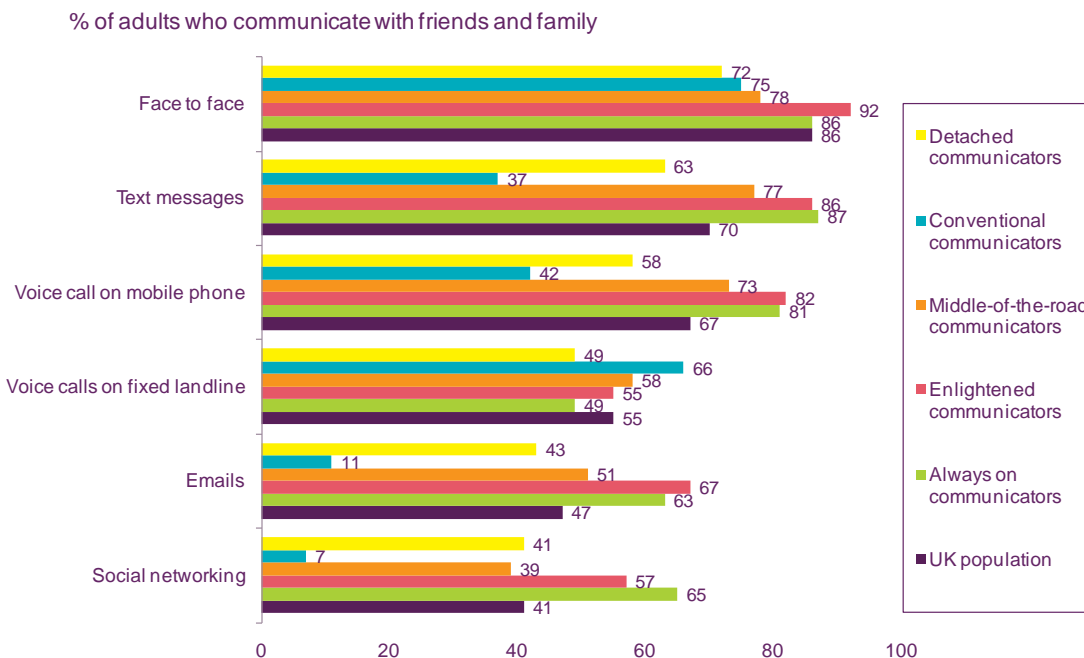


Figure 3.3 shows that when the timeframe is extended to ‘at least once a week’, face-to-face meetings (86%) emerge as the most common way of communicating with friends and family. At 92%, ‘enlightened’ communicators are the most likely to meet up each week with friends and family. Fixed landline voice calls are used the least by ‘always-on’ communicators and ‘detached’ communicators, with 49% of each group using this method each week.

Figure 3.3: Methods used on a weekly basis to communicate with friends and family



Source (Fig 3.2 and Fig 3.3): Ofcom research, 2012

Q2a: How often do you use x to communicate with friends and family?

Base: All who use any device (n=1980 aged 16+, 440 Always-on communicators, 373 Enlightened communicators, 443 Middle-of-the-road communicators, 312 Detached communicators, 416 Conventional communicators)

Looking now at the devices that people ever use to contact friends and family, figure 3.4 shows that mobile phones are by far the most popular means, primarily for calling (77%) but also for texting (75%).

‘Enlightened’ communicators, however, are the most likely of all the segments to use their mobile phone for calling friends and family (89%) and to use it for texting (89%). They are a third more likely than the overall population (81% vs. 61%) to use email to keep in touch with friends and family.

Mobile phones are also the key device for ‘always on’ communicators, although they tend to use them a little more for texting (90%) than for calling (87%). However, the traditional methods of calling from a landline or using the postal service are used more by ‘conventional’ communicators.

‘Detached’ communicators are more likely than the overall population to favour services that allow them to send brief forms of communication such as instant messaging or micro-blogging sites like Twitter.

Figure 3.4: Communication devices/services ever used for friends and family, by segment

		UK population	Always on communicators	Enlightened communicators	Middle-of-the-road communicators	Conventional communicators	Detached communicators
Mobile - voice	% ever use	77	87	89	84	53	72
	Indexed against UK pop'n	100	113	116	109	69	94
Text messages	% ever use	75	90	89	85	41	69
	Indexed against UK pop'n	100	120	119	113	55	92
Post	% ever use	72	65	65	74	69	69
	Indexed against UK pop'n	100	90	90	103	96	96
Landline - voice	% ever use	63	55	65	66	69	60
	Indexed against UK pop'n	100	87	103	105	110	95
Emails	% ever use	61	78	81	69	21	59
	Indexed against UK pop'n	100	128	133	113	34	97
Social networks	% ever use	49	72	66	50	10	48
	Indexed against UK pop'n	100	147	135	102	20	98
Instant messages	% ever use	42	64	57	40	8	45
	Indexed against UK pop'n	100	152	136	95	19	107
VoIP	% ever use	30	44	39	32	7	28
	Indexed against UK pop'n	100	147	130	107	23	93
Website comments	% ever use	25	39	30	23	5	30
	Indexed against UK pop'n	100	156	120	92	20	120
Micro-blogging	% ever use	15	26	21	10	1	16
	Indexed against UK pop'n	100	173	140	67	7	107

Source: Ofcom research, 2012

Q2A: Ever use device/service to communicate with family and friends

Base: All UK adults (n=2,012 aged 16+, 440 Always-on communicators, 373 Enlightened communicators, 450 Middle-of-the-road communicators, 320 Detached communicators, 429 Conventional communicators)

Table ranked by UK population

The colour-coded indices highlight the variance in usage of each communication device relative to the UK population

Looking at the ways in which people communicate with friends and family overall, figure 3.5 shows that 68% of all adults use *any* text-based methods and 63% use voice-based methods each day.

However, ‘always-on’ communicators and ‘enlightened’ communicators are heavy communicators, with 85% and 84% respectively using text-based methods and 75% and 72% using voice-based methods to communicate with friends and family each day.

‘Conventional’ communicators communicate the least of all the segments, but when they do they are more likely to choose voice-based than text-based methods (50% vs. 33%).

Figure 3.5: Text-based versus voice-based methods of communication with friends and family, by segment

	Daily		Weekly	
	Any text-based services	Any voice-based services	Any text-based services	Any voice-based services
UK adults	68%	63%	80%	88%
‘Always on’ communicators	85%	75%	94%	93%
‘Enlightened’ communicators	84%	72%	96%	92%
‘Middle-of-the-road’ communicators	73%	63%	87%	90%
‘Conventional’ communicators	33%	50%	47%	82%
‘Detached’ communicators	61%	51%	74%	80%

Source: Ofcom research, 2012

Q2a: How often do you use x to communicate with friends and family?

Base: All who use any device (n=1980 aged 16+, 440 Always-on communicators, 373 Enlightened communicators, 443 Middle-of-the-road communicators, 312 Detached communicators, 416 Conventional communicators)

Any text-based services: text messages, social networking, emails, instant messaging, comments on websites, micro blogging, post

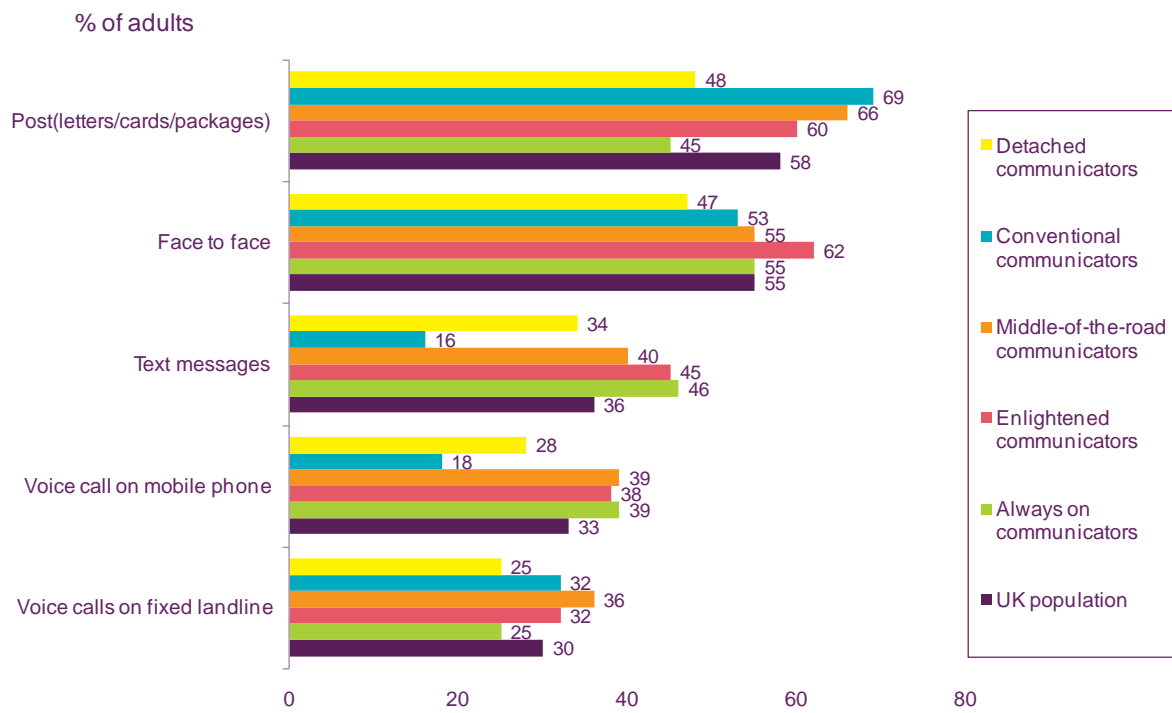
Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

3.4. Communicating in different circumstances

Figure 3.6 shows that, overall, respondents most frequently use the post (58%) and meeting in person (55%) on occasions such as birthdays. However, this varies according to segment, with ‘conventional’ communicators being much more likely to use post in these circumstances (69%).

Both ‘always-on’ communicators and ‘enlightened’ communicators are more likely to meet face to face than use post on occasions such as birthdays (55% of ‘always on’ communicators and 62% of ‘enlightened’ communicators meetg face to face compared to 45% and 60% who use post).

Figure 3.6: Communication methods ever used to send greetings (e.g. birthdays)



Source: Ofcom research, 2012

Q3a: ... which of these methods do you ever use to send greetings for occasions such as birthdays, get well, congratulations etc

Base: All who ever use at least one form of communication: Friends and family, (n=2006 aged 16+, 440 Always-on communicators, 373 Enlightened communicators, 450 Middle-of-the-road communicators, 317 Detached communicators, 426 Conventional communicators)

Chart ranked by UK population

Section 4

Communicating with businesses

4.1. Introduction

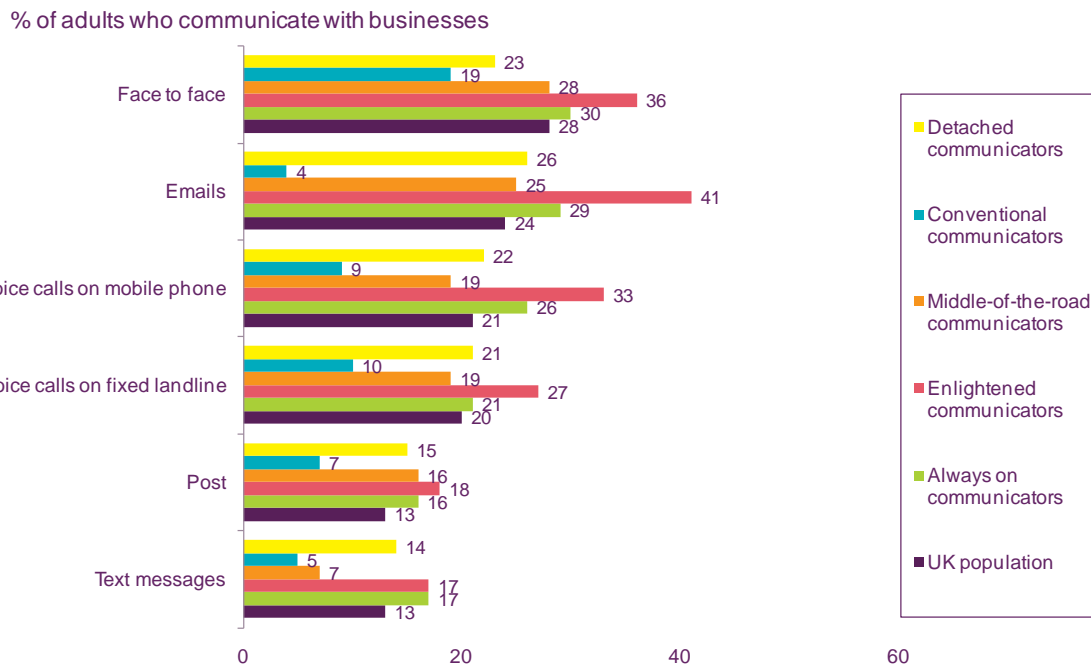
In addition to exploring the communication choices people make with friends and family, we considered how their choices differ when communicating with businesses and services. This includes occasions when people are looking to make a purchase, following up on something already purchased, contacting utilities companies, or contacting banks, or local authorities. This section will compare the segments' communication choices with these businesses and services.

4.2. Frequency of using different methods with businesses and services

Overall, on a weekly basis, face-to-face is the most widely used form of communication with any business or service, with 28% of all respondents stating they use this method for this purpose (figure 4.1). Over a third (36%) of 'enlightened' communicators say they meet face to face with businesses each week, as do just under a third (30%) of 'always-on' communicators.

'Detached' communicators are almost as likely to use face-to-face meetings (23%) as mobile phone calls (22%) or landline calls (21%) to contact businesses and services. When 'conventional' communicators need to contact businesses or services, face-to-face is their preferred method (19%) with landline calls the next most popular (10%).

Figure 4.1: Methods used each week to communicate with businesses and services



Source: Ofcom research, 2012

Q2b: How often do you use x to communicate with businesses and services?

Base: All who use any device (n=1980 aged 16+, 440 Always-on communicators, 373 Enlightened communicators, 443 Middle-of-the-road communicators, 312 Detached communicators, 416 Conventional communicators)

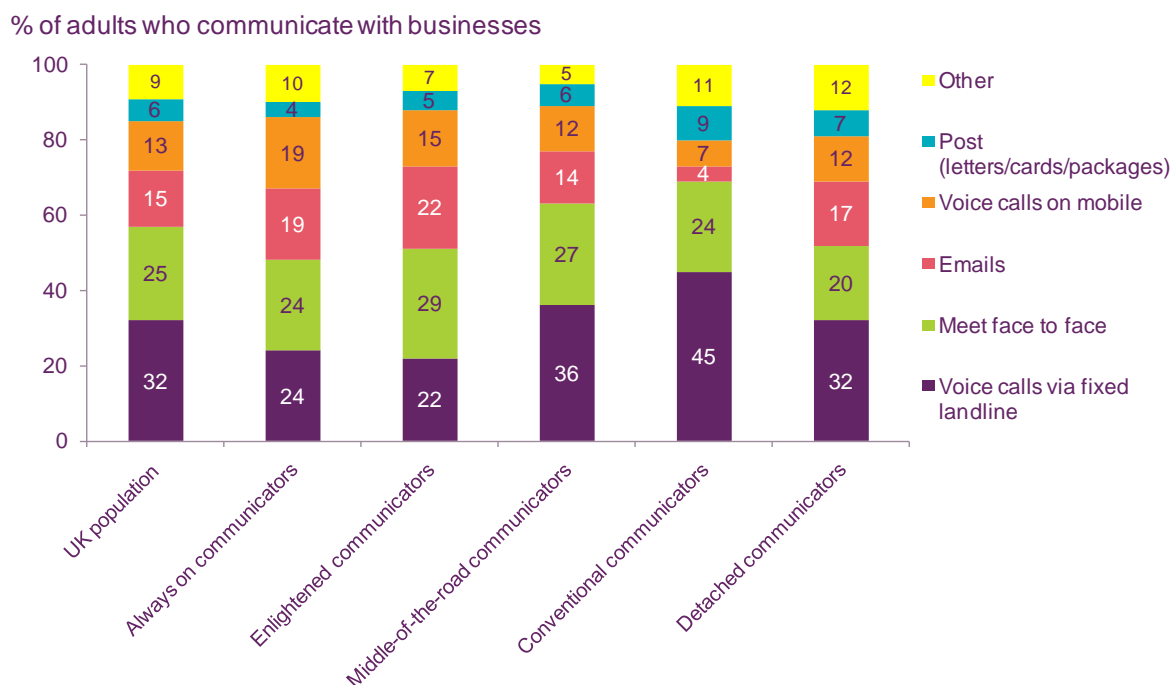
4.3. Preferred ways to communicate with businesses and services

When respondents are asked to choose their preferred method *if they can have only one way to communicate* with businesses and services, almost a third (32%) of adults choose voice calls via a fixed landline (figure 4.1). ‘Conventional’ communicators are the most likely to choose landline calls and ‘enlightened’ communicators are the least likely to opt for this method (45% vs. 22%).

‘Enlightened’ communicators are much more likely to choose to meet businesses and services face-to-face than using any other communication method (29%). They are also more likely than the general population to choose email over any other method (22% vs. 15%).

‘Always on’ communicators are nearly three times as likely as ‘conventional’ communicators to choose calling on a mobile (19% vs. 7%).

Figure 4.2: Preferred method to communicate with businesses and services



Source: Ofcom research, 2012

Q5b: If you had to pick one method of communicating with businesses and services which one would it be?

Base: All who ever use at least one form of communication with business/services, (n=1710 aged 16+, 372 Always-on communicators, 330 Enlightened communicators, 409 Middle-of-the-road communicators, 255 Detached communicators, 343 Conventional communicators)

4.4. Communicating with different types of business and service

We asked respondents to consider the different types of businesses and services they communicate with, to understand their communication choices according to the circumstances. We can compare differences between the segments by looking at the choices they make to communicate with banks and with utility services.

To illustrate these differences, Figure 4.3 shows how respondents prefer to contact their bank, compared to utility companies.

The main way for respondents to contact utility companies is via landline calls, with half (50%) of all adults stating they have used this method. However, this increases to 61% when we consider only the ‘conventional’ communicators. ‘Always on’ communicators are the least likely ever to have used landline calls for this purpose (41%).

Around a third of ‘always-on’ communicators and ‘enlightened’ communicators (33% and 32%) have ever used mobile phones to call utilities, compared to just one in ten ‘conventional’ communicators (12%) who are the least likely to have used this method.

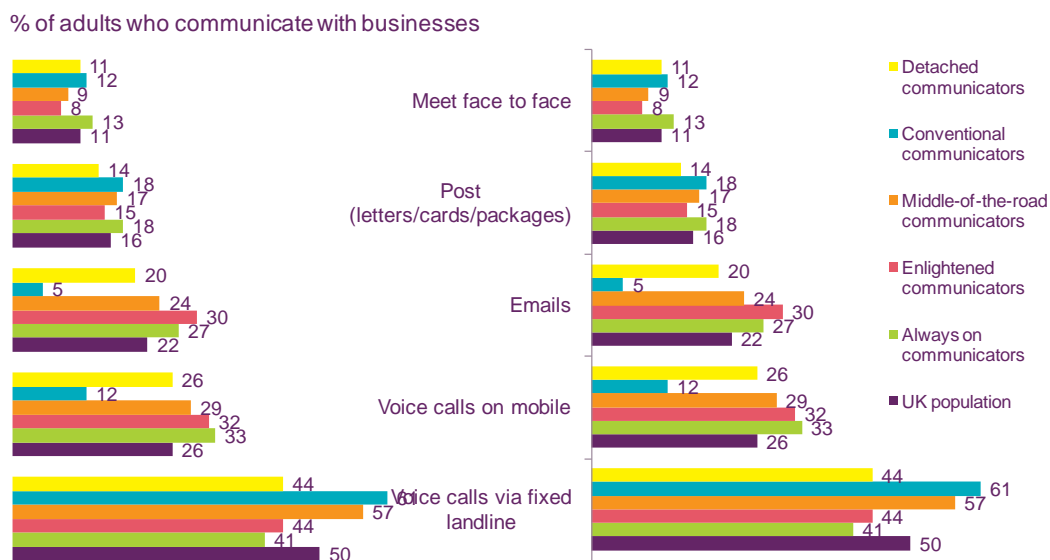
‘Conventional’ communicators are also the least likely ever to have used email to contact utilities, at just one in 20 (5%) compared to over a fifth (22%) of all adults and 30% of ‘enlightened’ communicators.

Of the five main communication methods, face-to-face meeting is the least likely to be used to communicate with utility companies, with just over one in ten adults (11%) indicating they have ever done this.

In contrast, face-to-face meetings are the most-used way for people to communicate with banks and financial institutions, with over half (51%) of all adults indicating they have done this. ‘Conventional’ communicators are the most likely to use face-to-face meetings to contact their bank (37% vs. 58% of all adults).

Just under a third (32%) of all adults have ever used a fixed landline to call banks; there is little difference between the segments. As seen with utility companies, mobile phone calls are more likely to be used by the younger groups: ‘enlightened’ communicators and ‘always on’ communicators, to contact banks; at 26% and 28%, respectively, compared to 20% of all adults and just 7% of ‘conventional’ communicators.

Figure 4.3: Methods ever used to communicate with different types of business



Source: Ofcom research, 2012

Q3b: Thinking about personal communication, which of these methods do you ever use to contact utilities companies for household or personal bills e.g. Gas, Electricity, TV, Phone/ your bank e.g. for statements or financial products?

Base: All who ever use at least one form of communication with business\services (n=1710 aged 16+, 372 Always-on communicators, 330 Enlightened communicators, 409 Middle-of-the-road communicators, 255 Detached communicators, 343 Conventional communicators)

Section 5

Attitudes to communication methods

5.1. Introduction

Interviewees were asked about their attitudes to various methods of communication. A series of statements were read out, and respondents were asked to indicate the extent to which the statement applied to them, using a 1 to 5 scale. The variation in response to these attitudinal statements enabled us to identify the five different segment types.

5.2. Attitudes to modern / digital communication methods

Considering first the responses from the whole sample, almost nine in ten (88%) respondents indicated that they preferred to speak to a real person rather than an automated service, and more than eight in ten (83%) said that they prefer to speak to family and friends face to face.

Around two-thirds (64%) stated that technology had changed the way they communicate, while almost six in ten (57%) claimed that new communication methods had made their lives easier. Over three-quarters of people (78%) agreed that they communicated with their family a lot, and slightly fewer (71%) agreed that they communicated with their friends a lot.

Therefore, the results show an overall preference for communicating face to face, although text-based communications are used more often on a daily basis.

Figure 5.1: Agreement with attitudes towards communication methods

	UK population	'Always on' communicator	'Enlightened' communicator	'Middle-of-the-road' communicator	'Conventional' communicator	'Detached' communicator
I prefer to communicate with a real person rather than an automated service	88	90	96	99	96	48
I prefer to speak in person to family and friends rather than other communication methods	83	84	88	94	93	45
I communicate with my family a lot	78	95	83	82	83	35
I think carefully about sharing my personal details online	73	82	89	93	46	54
I communicate with my friends a lot	71	91	83	76	67	27
Technology has changed the way I communicate	64	90	85	69	26	48
New communication methods have made my life easier	57	85	76	60	20	42
I can't understand sharing personal opinions with people I don't know e.g. Twitter	55	44	52	77	58	37
I often use the cheapest form of communication possible	54	82	18	80	37	44
I am happy to share information with a group of friends\ family at once	54	81	57	54	39	32
I don't send as many letters and cards by post as I used to because I prefer digital methods of communication	48	74	58	47	21	37
I tend to think about how long a response will take when I use a specific communication method	46	69	39	56	28	31
I don't think about the cost when using communication methods, I just use the most convenient	45	63	75	6	61	18
I find technology advances too quickly for me to keep up	45	53	10	44	75	34
I think e-cards are impersonal	40	32	59	60	29	24
I make an effort to use free services online	38	69	37	45	4	31
I like to keep up with technological trends	36	61	60	29	2	27
Automated services have made communication with businesses and services easier	29	60	29	17	12	28
I know more about the internet than most people I know	24	37	44	22	0	18
I actively subscribe to email news letters or product updates from companies I like	22	40	29	21	2	15
I am happy to post messages online that a wide audience can see	21	49	26	12	1	15
I am often the first to try new products and services	21	42	34	11	2	13

Source: Ofcom research, 2012

Q8: I am going to read out some statements and I would like you to tell me how much each one applies to you using a scale of 1-5, where 5 = totally applies. Table shows the proportion that indicated that the statement applies to them, by rating 4 or 5.

Base: UK adults aged 16+ (n=2,012 aged 16+, 440 Always-on communicators, 373 Enlightened communicators, 450 Middle-of-the-road communicators, 320 Detached communicators, 429 Conventional communicators)

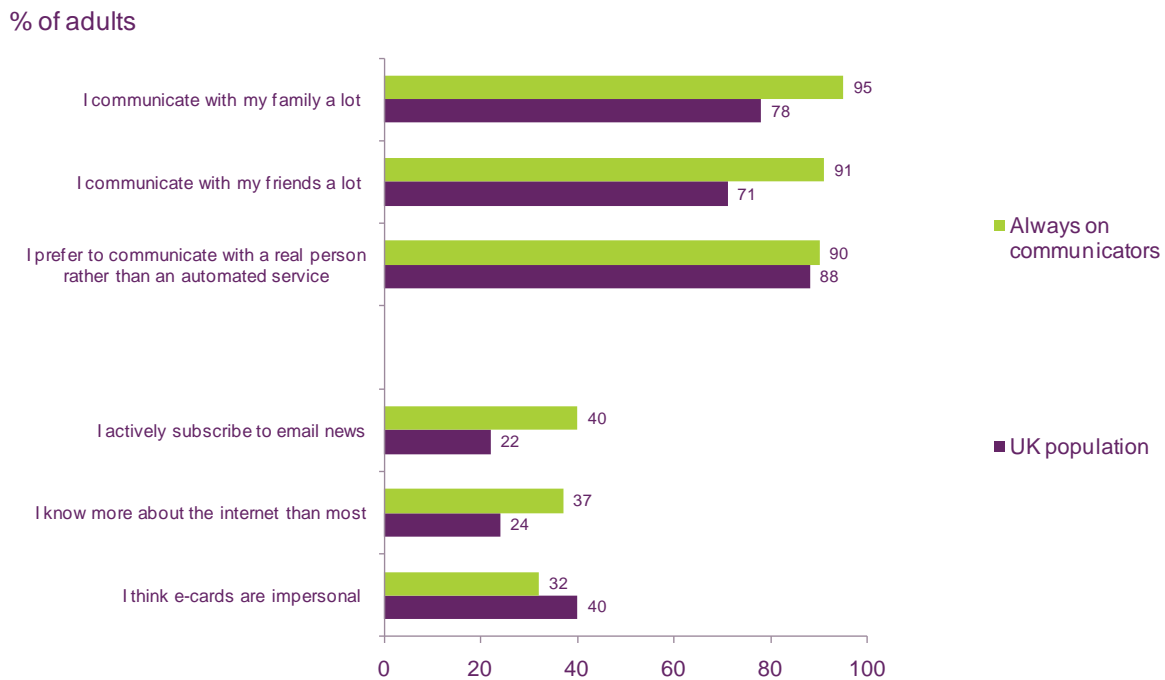
To explore the differences between the segments in more detail, we considered the top three and bottom three statements for each group.

As the group that communicates the most of all the segments, the top two statements for the 'always-on' communicators are, unsurprisingly, the two relating to communicating a lot with family (95%) and friends (91%) (figure 5.2). These are the highest figures for these statements of all the segments.

Four in ten (40%) 'always-on' communicators agree that they actively subscribe to email

news, the highest level of the segment types.

Figure 5.2: Top/bottom three attitudinal statements for ‘always-on’ communicators



Source: Ofcom research, 2012

Q8: I am going to read out some statements and I would like you to tell me how much each one applies to you using a scale of 1-5, where 5 = totally applies. Chart shows the proportion that indicated that the statement applies to them, by rating 4 or 5.

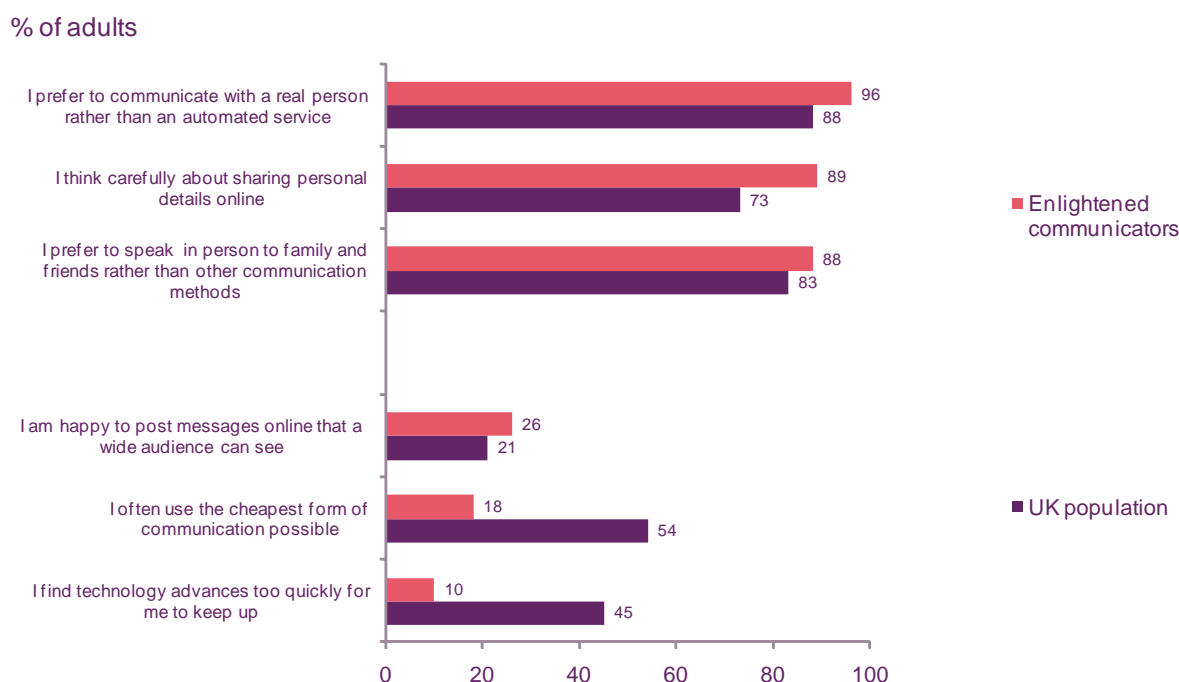
Base: UK adults aged 16+ n = 2012, Always-on communicators n= 440

‘Enlightened’ communicators are also heavy communicators, using a range of different methods (see figure 4.4), but figure 5.3 shows that they are keen to speak directly with people when they can, rather than using digital methods. Ninety-six per cent say they prefer to talk to a real person rather than an automated service and 88% prefer to speak in person with friends and family.

As the most likely to own a computer (see figure 2.4), ‘enlightened’ communicators are internet-savvy and 89% say they *‘think carefully about sharing personal details online’*. Similarly, although they are more likely than the general population to be *‘happy to post messages online that a wide audience can see’* (28% vs. 21% of all adults), they are more cautious than the ‘always on’ communicators, who are the most likely to agree with this statement (49%).

Predictably, only one in ten (10%) ‘enlightened’ communicators agree that *‘technology advances too quickly’* for them to keep up, compared to 45% of all adults and three-quarters (75%) of ‘conventional’ communicators.

Figure 5.3: Top/bottom three attitudinal statements for ‘enlightened’ communicators



Source: Ofcom research, 2012

Q8: I am going to read out some statements and I would like you to tell me how much each one applies to you using a scale of 1-5, where 5 = totally applies. Chart shows the proportion that indicated that the statement applies to them, by rating 4 or 5.

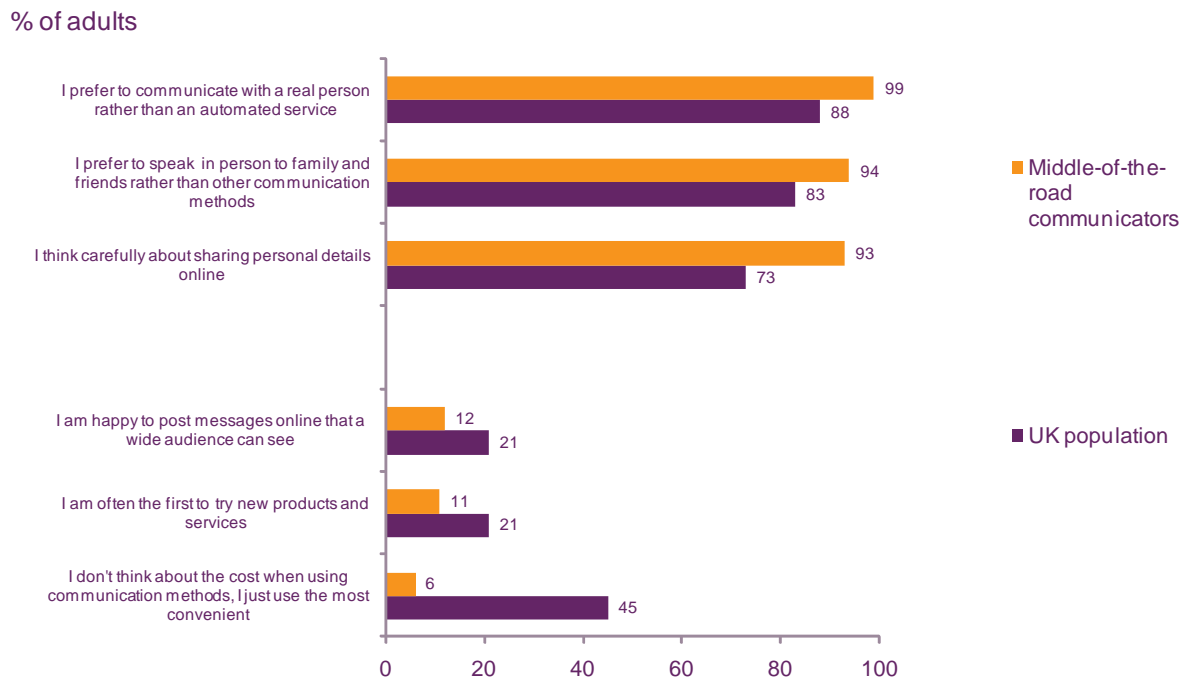
Base: UK adults aged 16+ n = 2012, Enlightened communicators n= 373

‘Middle-of-the-road’ communicators are the most likely to dislike communicating with automated services, with almost all (99%) agreeing that they ‘*prefer to communicate with a real person rather than an automated service*’ (figure 5.4). They are also the most likely to agree that they ‘*prefer to speak in person to family and friends*’ (94%) and, as with ‘enlightened’ communicators, the majority (94%) are careful about sharing any personal information online.

This group is the most likely to consider the cost of the communication method over the convenience; only 6% agree that they ‘*don’t think about the cost when using communication methods*’. ‘Enlightened’ communicators are the most likely to think about the most convenient option available, rather than cost, with three-quarters (75%) agreeing with this statement.

‘Middle-of-the-road’ communicators are less likely than the general population to ‘*be the first to try new products and services*’ (11% vs. 21% of all adults). ‘Always-on’ communicators are the most likely of all the segments to agree with this statement, at 42%.

Figure 5.4: Top/bottom three attitudinal statements for ‘middle-of-the-road’ communicators



Source: Ofcom research, 2012

Q8: I am going to read out some statements and I would like you to tell me how much each one applies to you using a scale of 1-5, where 5 = totally applies. Chart shows the proportion that indicated that the statement applies to them, by rating 4 or 5.

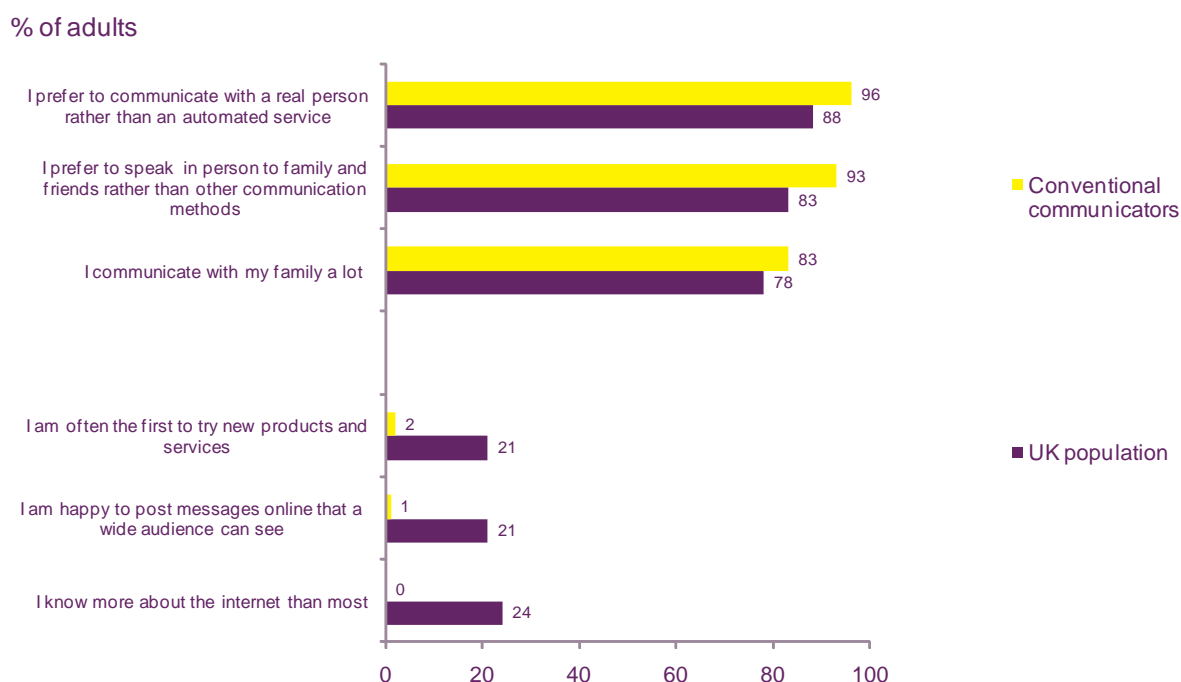
Base: UK adults aged 16+ n = 2012, Middle-of-the-road communicators n= 450

‘Conventional’ communicators share similar attributes to ‘enlightened’ communicators in their attitudes to communicating with family, in particular, with 93% agreeing that they ‘prefer to speak in person to family and friends rather than other communication methods’ (88% of ‘enlightened’ communicators). Eighty-three per cent of ‘conventional’ communicators say that they communicate with their families a lot, compared to 78% of all adults and just 35% of ‘detached’ communicators.

Figure 2.4 showed that ‘conventional’ communicators are the least likely to own a mobile phone (73% vs. 89% of all adults) or a computer (39% vs. 71% of all adults). Unsurprisingly figure 5.5 shows that none (0%) of this group agree that they ‘know more about the internet than most’ compared to around a quarter (24%) of all adults and 44% of ‘enlightened’ communicators.

In addition, only 1% of ‘conventional’ communicators say they are ‘happy to post messages online that others can see’ (compared to 21% of all adults), and only 2% agree that they are ‘often the first to try new products and services’.

Figure 5.5: Top/bottom three attitudinal statements for ‘conventional’ communicators



Source: Ofcom research, 2012

Q8: I am going to read out some statements and I would like you to tell me how much each one applies to you using a scale of 1-5, where 5 = totally applies. Chart shows the proportion that indicated that the statement applies to them, by rating 4 or 5.

Base: UK adults aged 16+ n = 2012, Conventional communicators n= 429

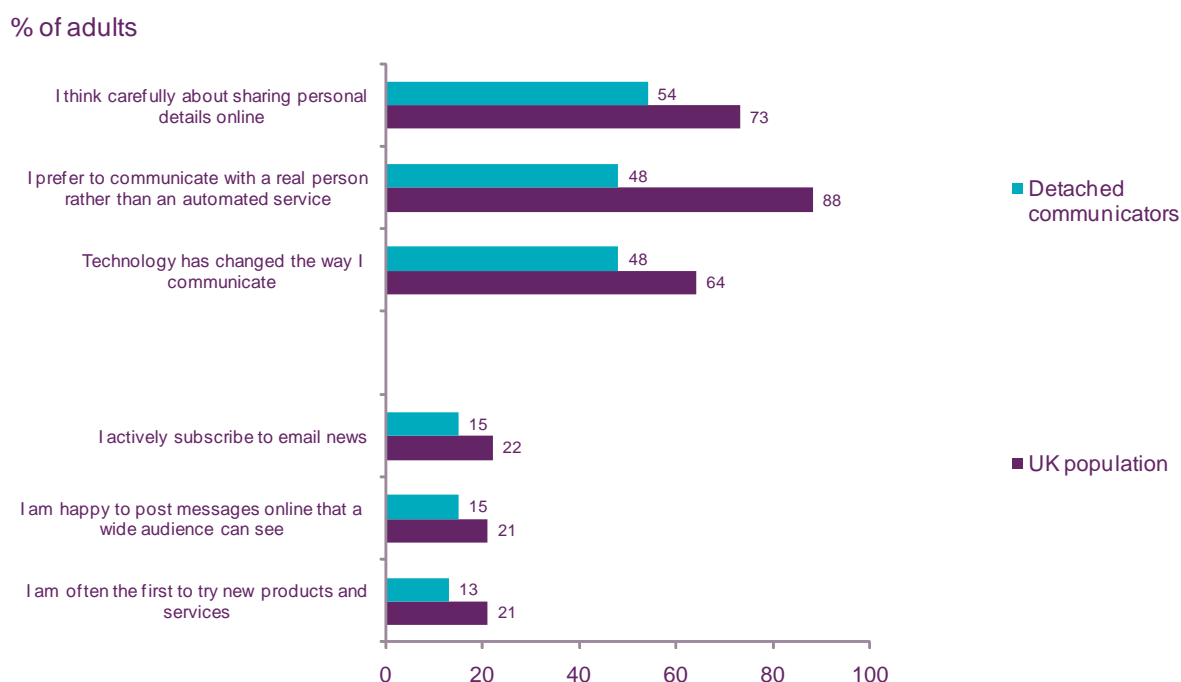
Communications and communication methods are not a priority for ‘detached’ communicators; the responses to all of these statements are below the average for the whole population (figure 5.6).

Although the statement which receives the highest level of response from ‘detached’ communicators is about being cautious about sharing personal information online, only 54% agree with this, compared to nearly three-quarters (73%) of all adults.

Similarly, less than half (48%) of this group agree that technology has changed the way that they communicate, compared to nine in ten (90%) ‘always-on’ communicators and 85% of ‘enlightened’ communicators. ‘Conventional’ communicators are the least likely to agree with this statement (26%).

The statements that receive the lowest levels of agreement from ‘detached’ communicators are about being proactive in sharing and receiving information, with only 15% agreeing that they ‘actively subscribe to email news’ and the same amount agreeing that they are ‘happy to post messages online that a wide audience can see’.

Figure 5.6: Top/bottom three attitudinal statements for ‘detached’ communicators



Source: Ofcom research, 2012

Q8: I am going to read out some statements and I would like you to tell me how much each one applies to you using a scale of 1-5, where 5 = totally applies. Chart shows the proportion that indicated that the statement applies to them, by rating 4 or 5.

Base: UK adults aged 16+ n = 2012, Detached communicators n = 320

3.3.2 Summary of communication choices

Figure 5.7 summarises the overall use of, and attitudes to, communication methods for each group when compared to the overall population.

Figure 5.7: Summary of use of, and attitudes towards, communication methods

		‘Always on’ communicators	‘Enlightened’ communicators	‘Middle-of-the-road’ communicators	‘Conventional’ communicators	‘Detached’ communicators
More likely to communicate by...		Micro-blogging (e.g. Twitter)	Social Networking	Emailing / Texting	Landline calls	Micro-blogging (e.g. Twitter)
% Ever use	Segment	28%	62%	73% / 85%	73%	19%
	All adults	16%	45%	65% / 76%	68%	16%
Less likely to communicate by...		Landline calls	Post	Micro-blogging (e.g. Twitter)	Micro-blogging (e.g. Twitter)	Text messaging
% Ever use	Segment	61%	82%	11%	1%	70%
	All adults	68%	82%	16%	16%	76%
More likely to say...		I am happy to post messages online that a wide audience can see	I know more about the internet than most people I know	I think e-cards are impersonal	I find technology advances too quickly for me to keep up	Automated services have made communications with businesses easier
% Agree	Segment	49%	44%	60%	75%	28%
	All adults	21%	24%	40%	45%	19%
Less likely to say...		I think e-cards are impersonal	I find technology advances too quickly for me to keep up	I don't think about cost when using communication methods, I just use the most convenient	I know more about the internet than most people I know	I communicate with my friends a lot
% Agree	Segment	32%	10%	6%	0%	27%
	All adults	40%	45%	45%	24%	41%

Source: Ofcom research, fieldwork carried out by Kantar Media February/March 2012

Figures for each segment within each category have been indexed against the figures for the overall population

Section 6

Changing patterns of communication

6.1. Changes to communication choices

We asked respondents whether they thought they used different communications services more or less than they did two years ago.

Figure 6.1 shows that, overall, respondents claimed to have increased their use of many communications services – largely those that rely on the internet or mobile telephony. The largest claimed increases in use were for email and texting, both with 17% of all adults claiming to use them more (net).

Considering the segments, the most dramatic increase is for email use among ‘enlightened’ communicators, with a claimed net increase of 33%. The use of social networks has also increased among this group and ‘always-on’ communicators in the past two years (both at +20%).

Claimed use of post has declined dramatically, by 30% (net) versus two years ago, with the greatest drop seen among ‘enlightened’ communicators (-38%).

The use of landline calls appears to have declined slightly overall (-4%), although this communication method has seen an increase among ‘conventional’ communicators (+9%).

Figure 6.1: Net claimed change in communications methods used in past two years

	UK population	'Always on' communicators	'Enlightened' communicators	'Middle-of-the-road' communicators	'Conventional' communicators	'Detached' communicators
Emails	17%	13%	33%	23%	6%	12%
Text messages	17%	18%	17%	21%	13%	13%
Social networks	14%	20%	20%	18%	1%	7%
Mobile - voice	11%	13%	12%	12%	10%	11%
VoIP	5%	7%	5%	10%	1%	5%
Instant messages	5%	11%	8%	4%	0%	3%
Face to face	1%	0%	-1%	-3%	9%	-2%
Website comments	1%	2%	3%	2%	-1%	0%
Micro-blogging	0%	2%	1%	0%	-1%	0%
Landline – voice	-4%	-6%	-11%	-11%	9%	0%
Post	-30%	-31%	-38%	-34%	-21%	-23%

Source: Ofcom research, 2012

Q6a/6b: Which, if any, of these methods do you use to communicate MORE/LESS than you did 2 years ago

Note chart shows net percentage (% who predict to use more - % who predict to use less)

Base: UK adults aged 16+, n = 2008

6.2. Communication choices in the future

We asked respondents which communication methods they expected to use more, and less, in the future. Figure 6.2 shows that adults expect to use more email (+17% net), VoIP (+11%), text messages (+7%), mobile calls (+7%), and social networking (+7%).

Many respondents also predict that they will continue to reduce their use of post for letters, card and parcels (-22% net).

Considering the segments, 'enlightened' communicators and 'detached' communicators expect their use of email to increase over the next two years (+24% and +23% respectively). 'Conventional' communicators are the least likely to think that they will email more (+9%) - they feel that they are more likely to increase their level of face-to-face communication (+10%) and also landline calls (+10%).

Overall, 'enlightened' communicators are the most likely to expect their use of postal communication methods to decrease over the next two years (-30%).

The data in Figure 6.2 should of course be treated with caution since they are based on respondents' predicted behaviour. It should also be noted that the survey took place shortly after an announcement that stamp prices were to increase, so respondents' stated future intentions about use of the postal service may have been influenced by this.

Figure 6.2: Net predicted changes in communications methods that will be used in the next two years

	UK population	'Always on' communicators	'Enlightened' communicators	'Middle-of-the road' communicators	'Conventional' communicator	'Detached' communicators
Emails	17%	14%	24%	13%	9%	23%
VoIP	11%	13%	12%	10%	3%	15%
Text messages	7%	6%	9%	6%	5%	8%
Mobile - voice	7%	6%	11%	7%	5%	8%
Social networks	7%	11%	11%	7%	1%	7%
Instant messages	5%	12%	7%	3%	0%	5%
Face to face	4%	3%	3%	3%	10%	5%
Website comments	1%	0%	2%	0%	0%	1%
Micro-blogging	1%	3%	1%	0%	-1%	2%
Landline - voice	-1%	-3%	-6%	1%	10%	-5%
Post	-22%	-22%	-30%	-19%	-12%	-25%

Source: Ofcom research, 2012

Q7a/7b: In the next two years which of them do you think you will use more/less than you do now?

Note chart shows net percentage (% who predict to use more - % who predict to use less)

Base: UK adults aged 16+, n = 2009

Annex 1

Technical specification

1.1. Introduction

Research was undertaken in March 2012 to understand the communication methods used by UK adults. The research covered methods used for communication with friends and family, and methods used to interact with businesses. A segmentation analysis was used to understand how individuals use different combinations of methods.

1.2. Data collection

Data were collected from a demographically nationally representative sample of the UK population aged 16+ using a face-to-face omnibus with fieldwork undertaken between the 16th and 20th March 2012.

The questionnaire covered the following areas:

- Devices used
- Frequency of using different communication method with friends and family and businesses
- Communication methods used for different groups
- Preferred method of communication for different groups
- Single preferred communication method
- Communications methods used more/less than two years ago
- Communication methods will use/less more in the future
- Battery of 22 attitudinal statements about communication methods

1.3. Segmentation

A segmentation was undertaken on the entire sample based on the frequency of using methods of communication with family and friends, or businesses, and people's attitudes to communication methods.

- **Data cleansing** – “Don't know” responses were imputed with the statement mean value by age group due to distinct patterns within the data.
- **Input variables** – The segmentation used both behavioural and attitudinal input variables. A factor analysis was run on the 22 attitude statements with the number of factors chosen by using the Kaiser Criterion. The five factors were:
 - **Technological/progressive**
 - I like to keep up with the latest technological trends
 - New communications methods have made my life easier
 - Technology has changed the way I communicate
 - I know more about the internet than most people I know
 - I make an effort to use free services online
 - I am often the first to try new products and services
 - I actively subscribe to email news letters or product updates from companies I like

- I am happy to post messages online that a wide audience can see
 - I don't send as many letters and cards by post as I used to, because I prefer to use digital methods of communication
 - Automated services have made communications with businesses and services easier
 - I tend to think about how long a response will take when I use a specific communication method
- **Enthusiastic communication**
 - I communicate with my family a lot
 - I communicate with my friends a lot
 - I am happy to share information with a group of friends\ family at once
- **Traditional**
 - I can't understand sharing personal opinions with people I don't know e.g. Twitter
 - I think e-cards are impersonal
 - I think carefully about sharing my personal details online
 - I prefer to communicate with a real person rather than an automated service
 - I prefer to speak in person to family and friends rather than via other communication methods
- **Convenience**
 - I don't think about the cost when using communication methods, I just use the most convenient
 - I often use the cheapest form of communication possible
- **Technology chasing**
 - I find technology advances too quickly for me to keep up

There were 13 behavioural variables made up of the number of times each communication method was used in a year:

- Emails
- Social networking sites
- Instant messaging
- Skype
- Comments on forums
- Voice calls
- Virtual assistance on websites
- E-cards
- Text messaging
- Picture messaging
- Post
- Face to face

Canonical correlations between the attitudinal factors and behavioural variables were computed to provide the input variables for the cluster analysis.

- **Cluster analysis** – a k-means cluster analysis using SPSS v17 was performed with initial seeds created by using a two-step cluster analysis. The optimal number of clusters was derived by comparing cluster homogeneity and heterogeneity. Homogeneity was computed as the average distance of a respondent from the cluster centre, and heterogeneity was computed as the average distance between clusters.