



Application to Person (A2P) Consumer Research

January 2025



Background and Objectives

Background

Application-to-person (A2P) messaging is an important form of communication for UK businesses, consumers and citizens, with examples including one-time passcodes for online banking, medical appointment reminders and parcel delivery notifications.

As the regulator of the communications sector in the UK, Ofcom monitors telecoms markets and considers the impacts of any material changes to these markets on businesses and consumers.

This quantitative research study has been used to inform our work in this area as we seek to understand the experiences of A2P message recipients and their use of messaging services (e.g. WhatsApp).

Objectives

Through this research, Ofcom wanted to better understand:

- Levels of awareness of A2P SMS and other A2P comms services among a representative sample of UK adults (aged 18+)
- Whether consumers had preferences for receiving different types of A2P messages from organisations via a range of communications services, and whether origination of A2P messages from public or private sector organisations impacted those preferences
- Why some consumers think it is not acceptable to receive different types of A2P message via some communications service, and whether origination of A2P messages from public or private sector organisations impacted acceptability
- How comfortable consumers are receiving certain types of A2P messages (e.g. one-time passcodes, GP hospital appointments, etc) via WhatsApp, SMS and/or in-app notifications

Methodology

Sample

- 2064 adults aged 18+ in the UK
- Quotas set on age, gender, ethnicity and region

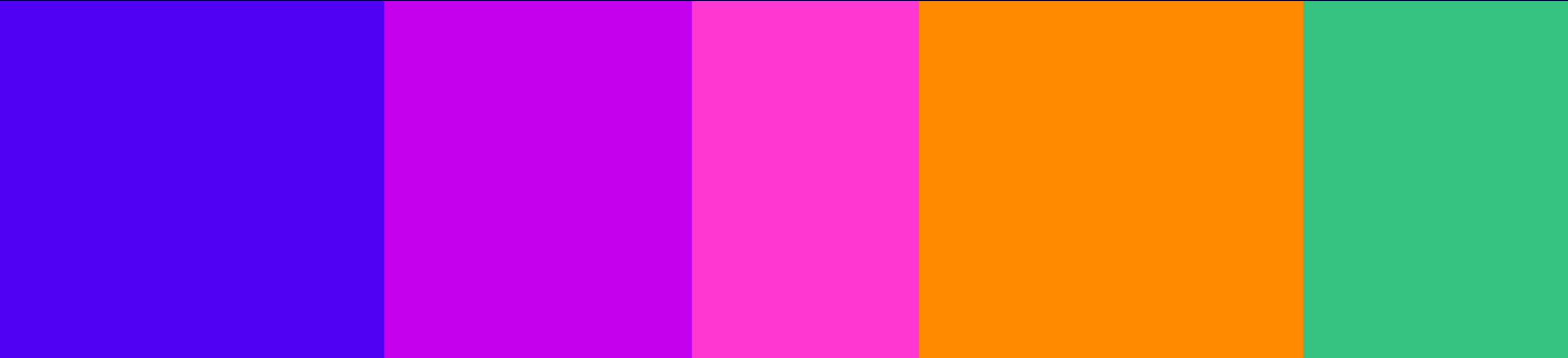
Data collection

- Online omnibus survey (conducted by Yonder Consulting)
- Fieldwork conducted between 11th – 13th October 2024

Data reporting

- Weighted to be nationally representative of the UK
- Significance testing within demographic groups applied at the 95% confidence level
- Significance testing against the total applied at the 99% confidence level

ACCESS, AWARENESS AND RECEIPT of Communications and A2P messaging services



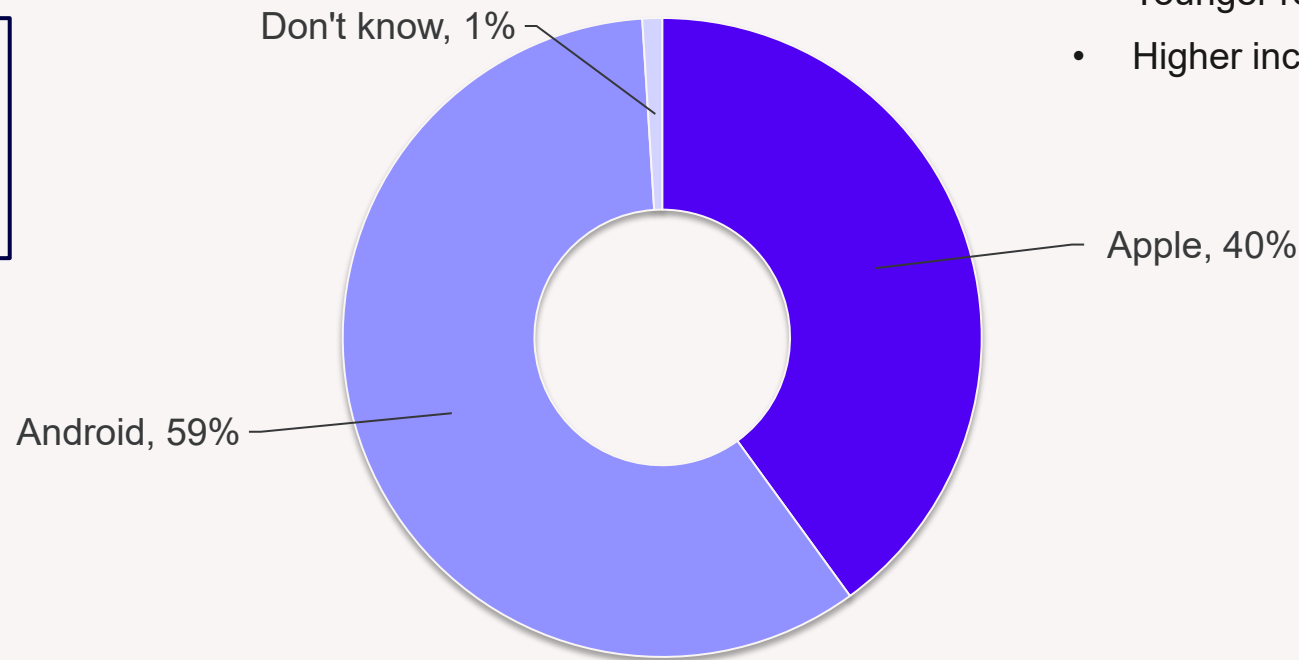
Almost three in five respondents owned a smartphone that functioned on an Android operating system

Smartphone operating system (OS): Apple v Android

Apple (iOS) more popular among:

- Younger respondents (18-34s)
- Higher income households (over £48,000)

94% of respondents said they personally used a smartphone



Android more popular among:

- Older respondents (aged 35+)
- Lower income households (up to £21,000)

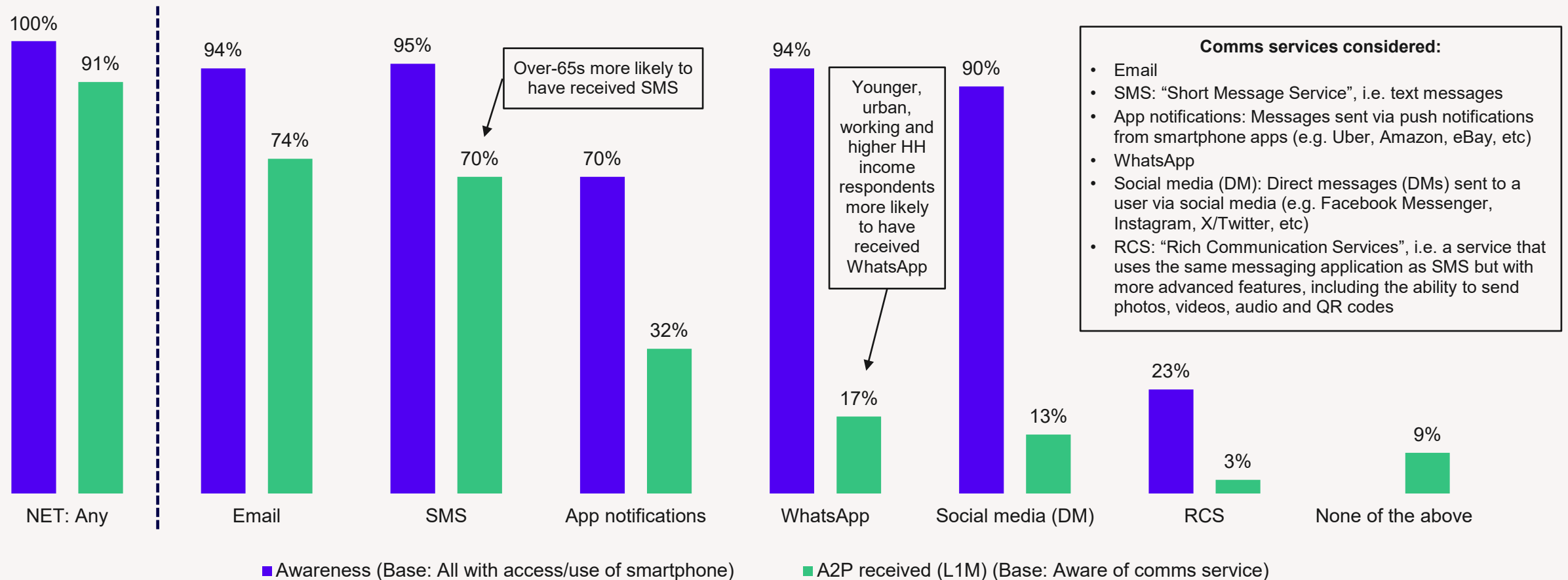
Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q2. Does your smartphone function on an Apple (also known as iOS) or an Android operating system?

Base: All with access to and usage of a smartphone (1946) – “Neither” responses not shown <1%.

7 in 10 of those aware of SMS received an A2P message via that service in the last month; for those aware of WhatsApp, this proportion was less than 2 in 10

Awareness of comms services and (if aware of service) receipt of A2P messages in the last month (L1M)



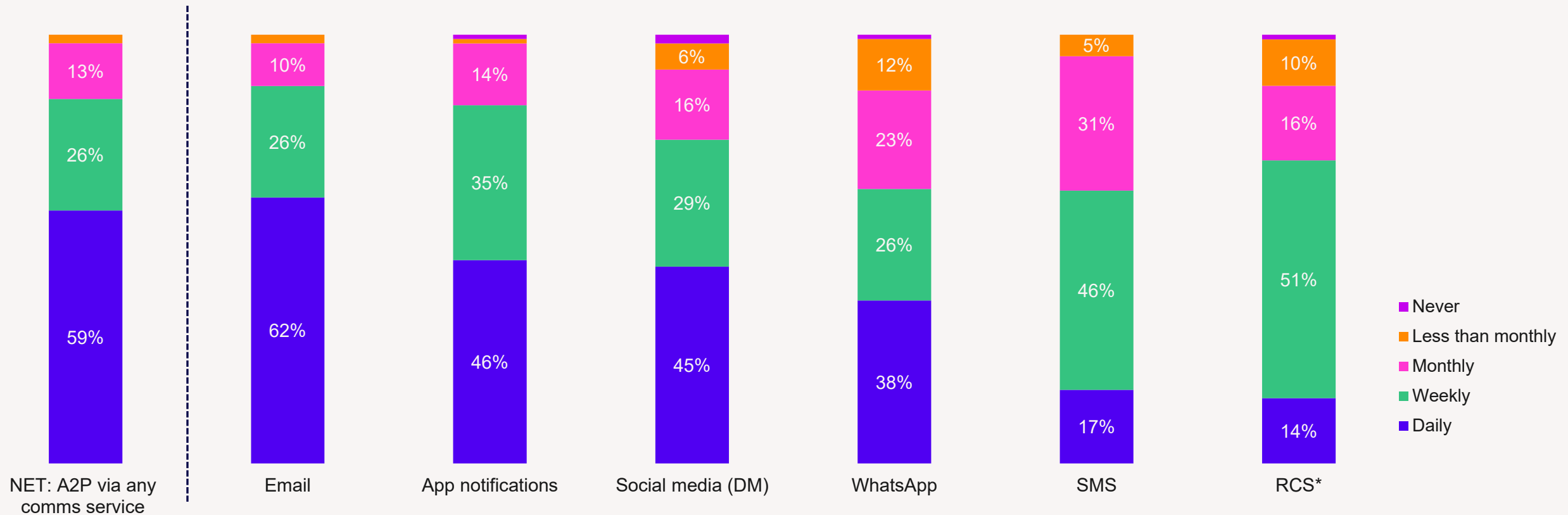
Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q3. Are you aware of any of the following communications services that can be used to send and/or receive messages? Q4. In the last month, have you been contacted by a business or other organisation through any of the following communications services?

Base: Q3. All with access to and usage of a smartphone (1946). Q4. Respondents were only asked about the communications services that they were aware of at Q3 (SMS: 1854; WhatsApp: 1837; Email: 1835; Social media (DM): 1759; App notifications: 1370; RCS: 439).

The average frequency of A2P message receipt was lower for SMS than other messaging services

Average frequency (by comms service) of A2P messages received



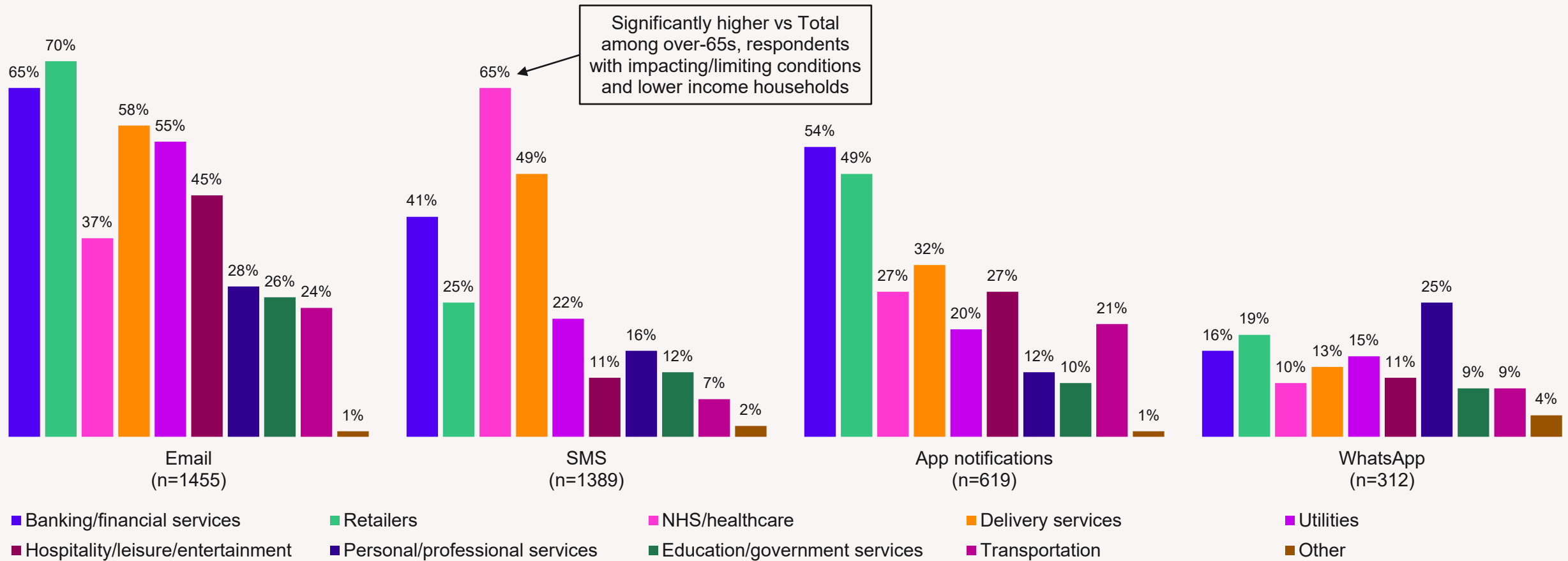
Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q5. How frequently on average would you say you are contacted by businesses / organisations over any of the following communications services?

Base: All who received A2P messages via communications services in the last month (1766): WhatsApp (312); SMS (1389); RCS (67*); Social media (direct messaging) (247); App notifications (619); Email (1455). "Don't know" responses not shown. (*RCS = low base size.)

SMS recipients most commonly received messages from NHS/healthcare providers, while email/app notification recipients were most commonly messaged by banks and/or retailers

Message receipt (by sector) among recipients of A2P email/SMS/App notification/WhatsApp in the last month



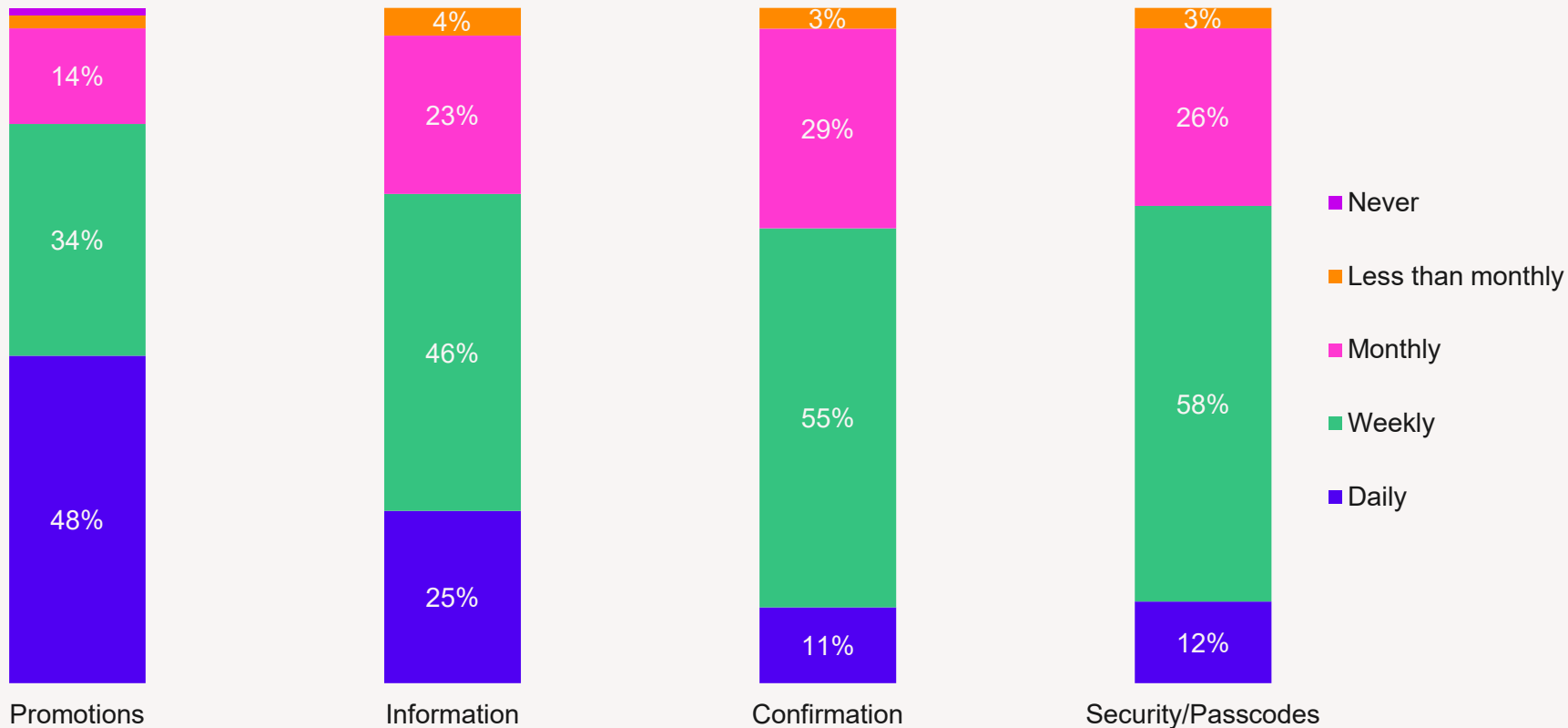
Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q6. In the last month, have any of the following types of businesses / organisations contacted you via the following ways?

Base: All who received A2P messages via communications services in the last month (1766): WhatsApp (312); SMS (1389); App notifications (619); Email (1455). “None of the above” and “Don’t know” responses not shown.

Around half of promotional messages were received daily by A2P recipients

Frequency of A2P messages received (by message category)



Message examples given to respondents:

Confirmation: New appointment confirmations (doctors/NHS, hair/beauty, etc), reservations (restaurants, theatres, cinemas, etc), payment receipts, etc.

Information: Reminders (appointments/reservations/etc), alerts (NHS, government, etc), updates, internal team/company communications, etc.

Promotions: Marketing, deals, offers, etc.

Security/Passcodes: One-time passwords for secure logins, mobile phone number verifications, etc.

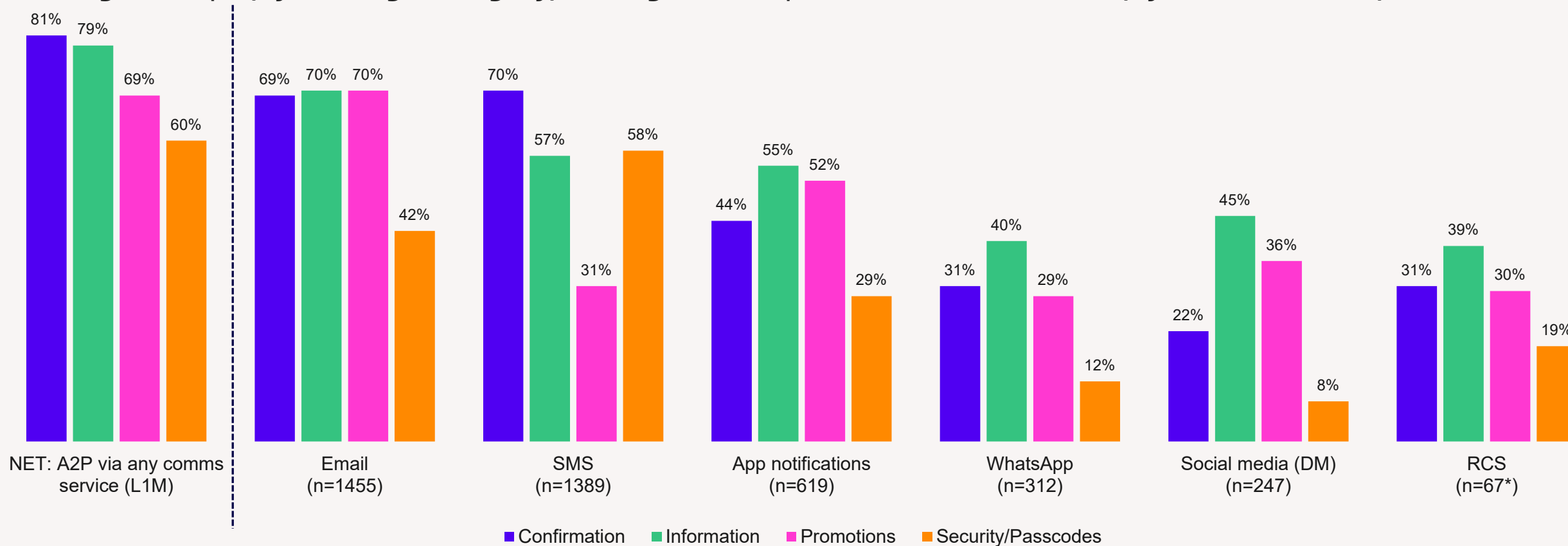
Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q8. How frequently would you say you have been contacted by businesses / organisations with the following messages?

Base: All who received Confirmation (1448), Information (1406), Promotion (1214) and Security/Passcode (1085) A2P messages via communications services in the last month – “Don’t know” responses not shown.

SMS recipients were around twice as likely to have received confirmation, information and/or security/passcode A2P messages than they were promotional messages

Message receipt (by message category) among A2P recipients in the last month (by comms service)



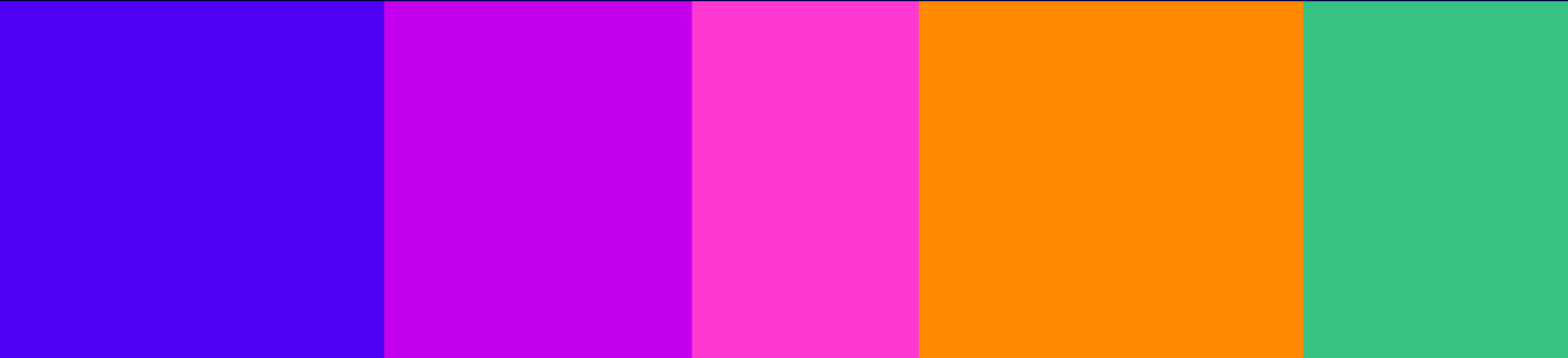
Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q7. In the last month, have you received any confirmation, information, promotions or security/passcode messages from businesses / organisations via the following ways?

Base: All who received A2P messages via communications services in the last month (1766): WhatsApp (312); SMS (1389); RCS (67*); Social media (direct messaging) (247); App notifications (619); Email (1455). (*RCS = low base size.)

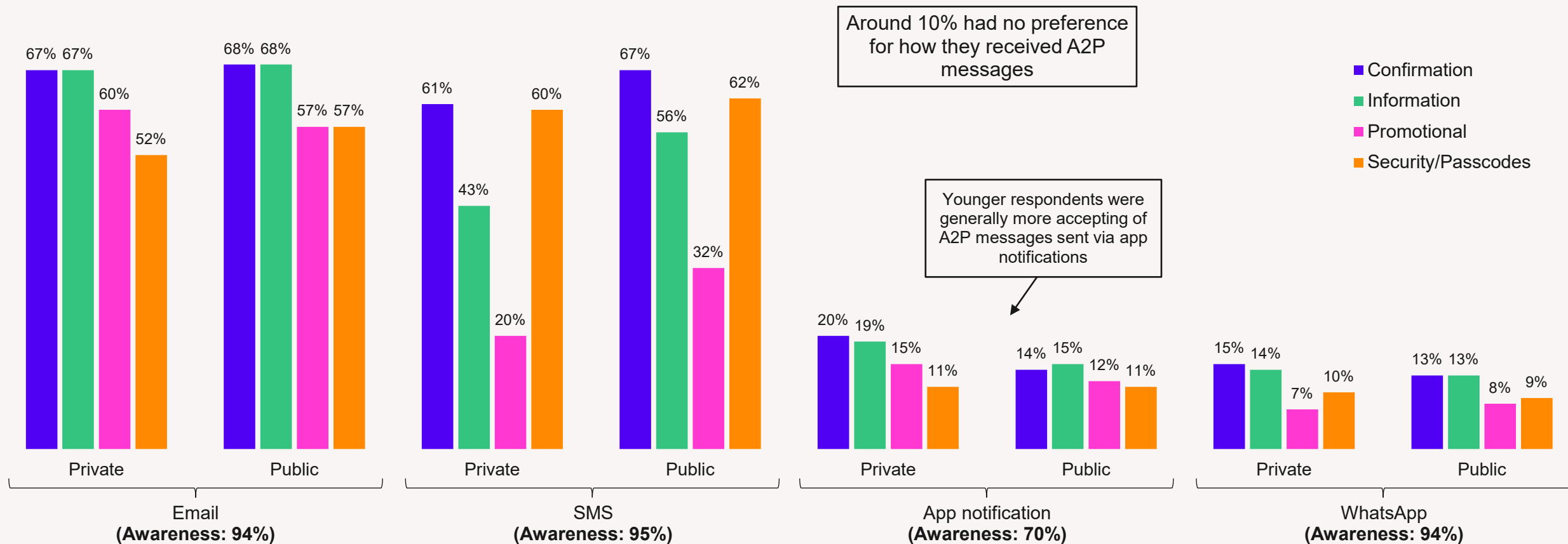
A2P ACCEPTABILITY

By A2P message category, sector and comms service



Despite similar awareness levels, respondents felt that it was more acceptable to receive A2P messages from private/public organisations via SMS/email than via WhatsApp

Acceptability of A2P messaging (by message category/comms service) – Private vs Public



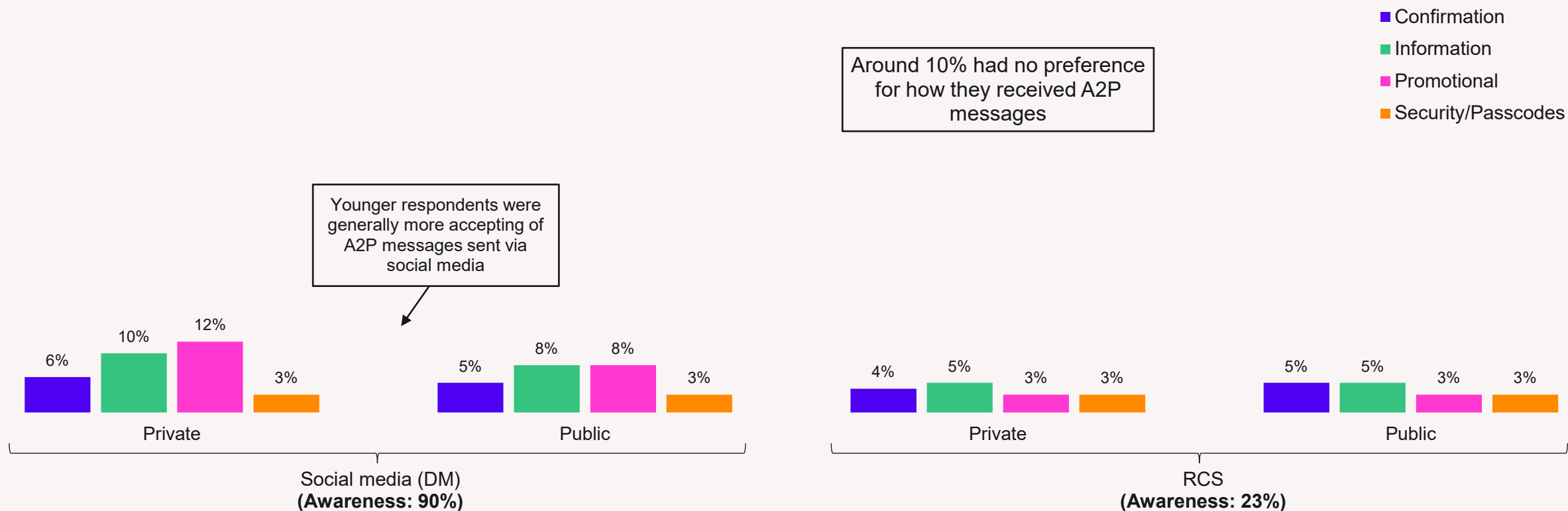
Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q9A-D. Which (if any) of the following communications services would you find it acceptable to receive the following messages over that were sent directly to you from a commercial organisation? Q10A-D. Which (if any) of the following communications services would you find it acceptable to receive the following messages over that were sent directly to you from a public sector organisation?

Base: All with access to and usage of a smartphone (1946) – Respondents were only asked about the communications services that they were aware of at Q3 (SMS: 1854; WhatsApp: 1837; Email: 1835; Social media (DM): 1759; App notifications: 1370; RCS: 439).

A minority of respondents who were aware of social media (direct messaging) or RCS said that it was acceptable for organisations to contact them via those channels

Acceptability of A2P messaging (by message category/comms service) – Private vs Public



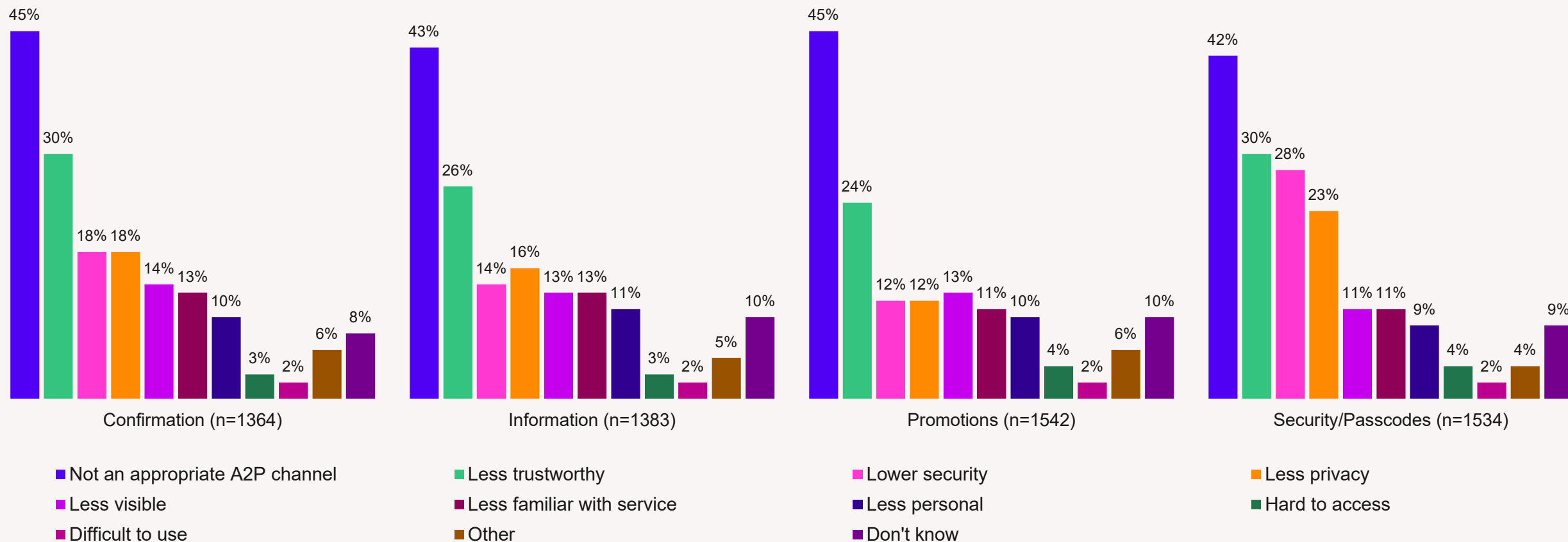
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Base: All with access to and usage of a smartphone (1946) – Respondents were only asked about the communications services that they were aware of at Q3 (SMS: 1854; WhatsApp: 1837; Email: 1835; Social media (DM): 1759; App notifications: 1370; RCS: 439).

Many respondents did not consider WhatsApp to be an appropriate or trustworthy method of receiving information from private sector organisations

Reasons why A2P WhatsApp messages were seen as unacceptable (by message category) – Private sector



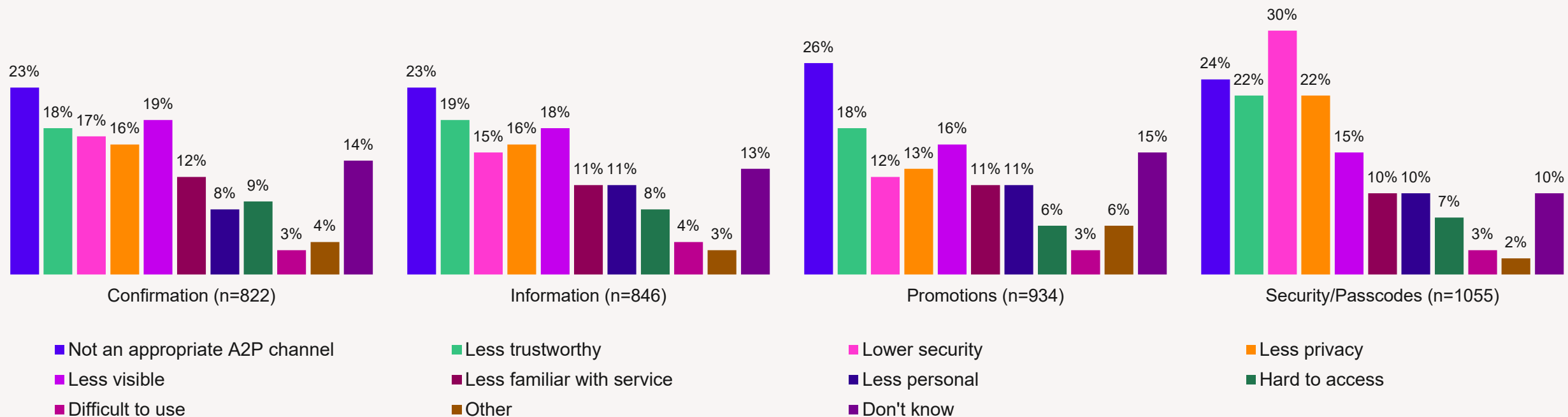
Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q9E-H. You have said that you wouldn't find it acceptable to receive the following messages from a commercial organisation via WhatsApp... Why wouldn't you find it acceptable to receive these messages?

Base: All who found it unacceptable to receive confirmation (1364), information (1383), promotion (1542) or security/passcode (1534) A2P messages from private sector organisations via WhatsApp.

For confirmation, information and promotion A2P messages from private sector organisations, app notifications were commonly believed to be an inappropriate channel, while having lower security was the most common issue for security/passcodes messages

Reasons why A2P app notification messages were seen as unacceptable (by message category) – Private sector



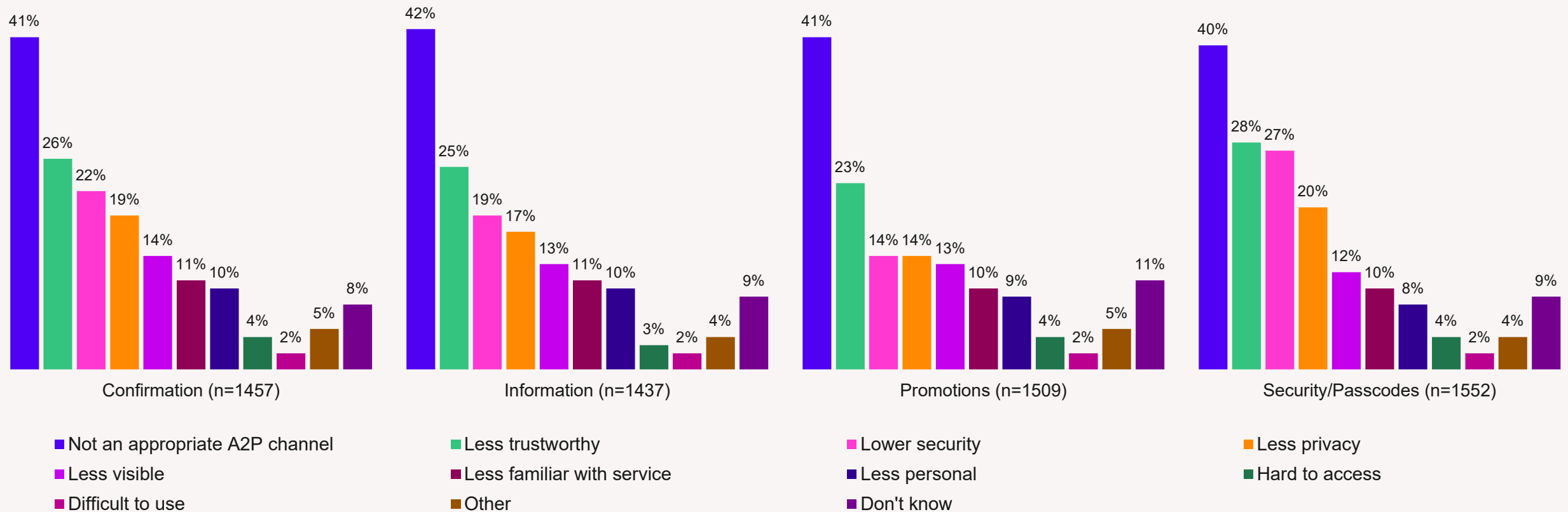
Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q9J-M. You have said that you wouldn't find it acceptable to receive the following messages from a commercial organisation via a smartphone app notification... Why wouldn't you find it acceptable to receive these messages?

Base: All who found it unacceptable to receive confirmation (822), information (846), promotion (934) or security/passcode (1055) A2P messages from private sector organisations via smartphone app notification.

Many respondents did not consider WhatsApp to be an appropriate method of communication from public sector organisations

Reasons why A2P WhatsApp messages were seen as unacceptable (by message category) – Public sector



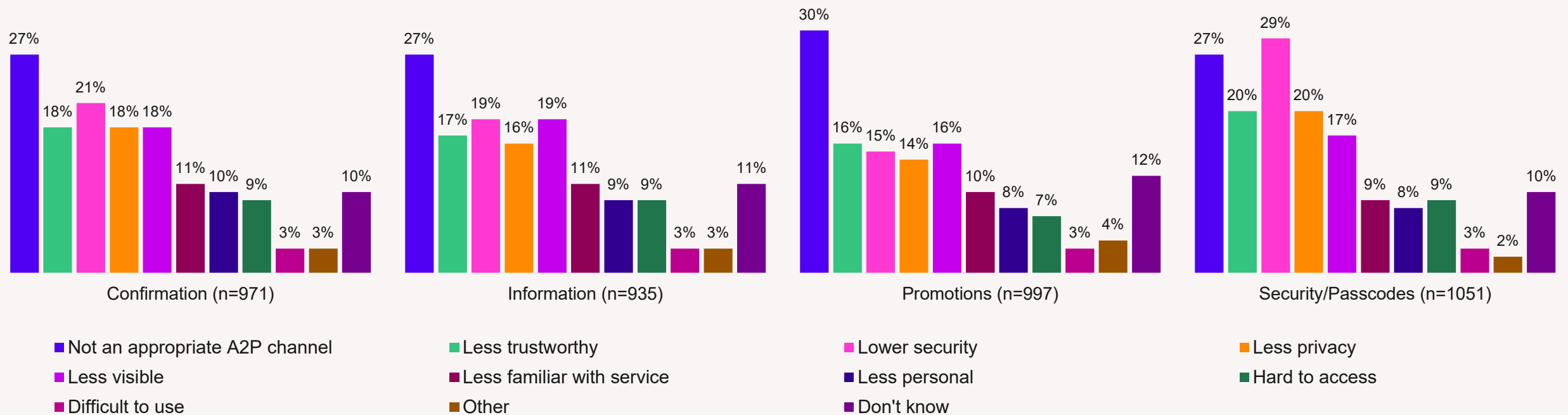
Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q10E-H. You have said that you wouldn't find it acceptable to receive the following messages from an organisation in the public sector via WhatsApp... Why wouldn't you find it acceptable to receive these messages?

Base: All who found it unacceptable to receive confirmation (1457), information (1437), promotion (1509) or security/passcode (1552) A2P messages from public sector organisations via WhatsApp.

For confirmation, information and promotion A2P messages from public sector organisations, app notifications were commonly believed to be an inappropriate channel, while having lower security was also a common issue for security/passcodes messages

Reasons why A2P app notification messages were seen as unacceptable (by message category) – Public sector



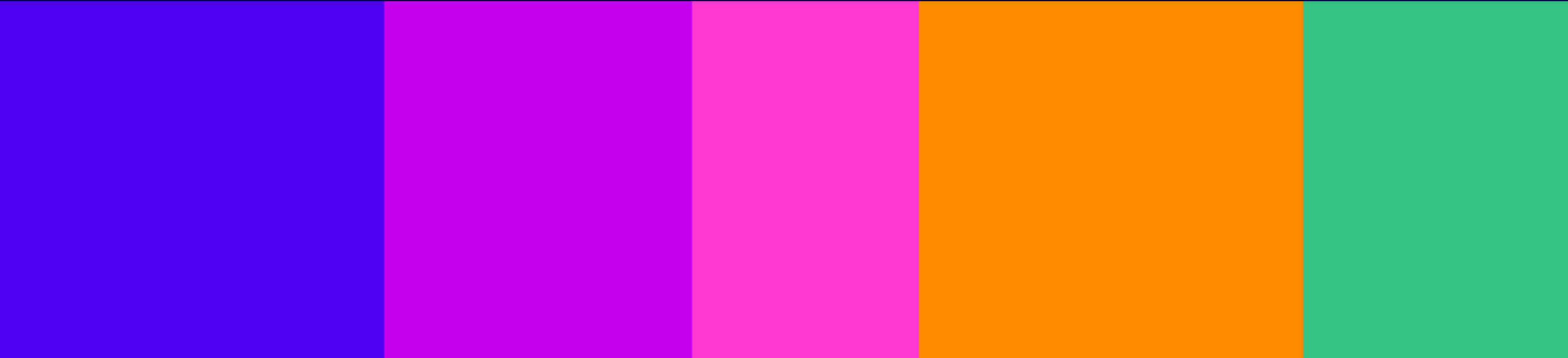
Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q10J-M. You have said that you wouldn't find it acceptable to receive the following messages from an organisation in the public sector via smartphone app notification... Why wouldn't you find it acceptable to receive these messages?

Base: All who found it unacceptable to receive confirmation (971), information (935), promotional (997) or security/passcode (1051) messages from a public organisations via app notification.

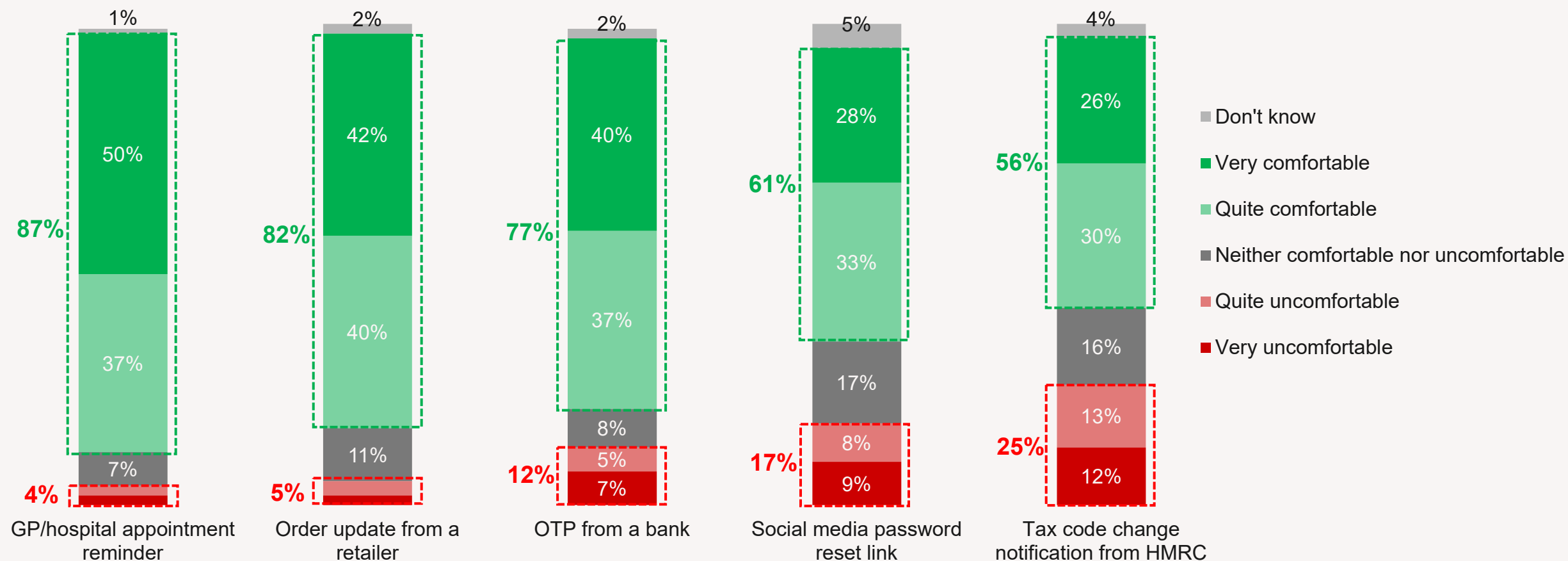
A2P MESSAGING SCENARIOS

Comfort levels (WhatsApp, SMS and app notifications)



The majority of those aware of SMS said they would be comfortable receiving A2P communications via that channel for a range of purposes

Levels of comfort/discomfort when receiving specific A2P messages via SMS



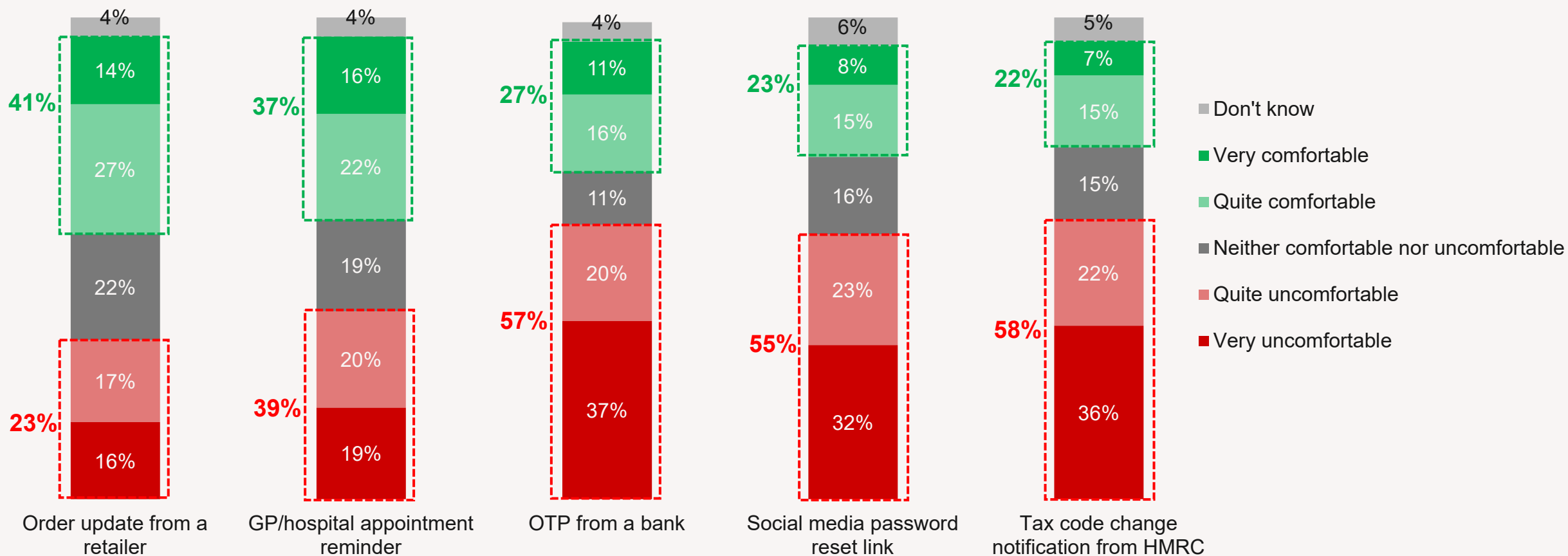
Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q12A-E. How comfortable or uncomfortable would you be if you received the following messages from a business/organisation via text message (SMS)?

Base: All who are aware of SMS (1864).

In message scenarios relating to personal finance or passwords, over half of those aware of WhatsApp were uncomfortable receiving A2P communications via that channel

Levels of comfort/discomfort when receiving specific A2P messages via WhatsApp



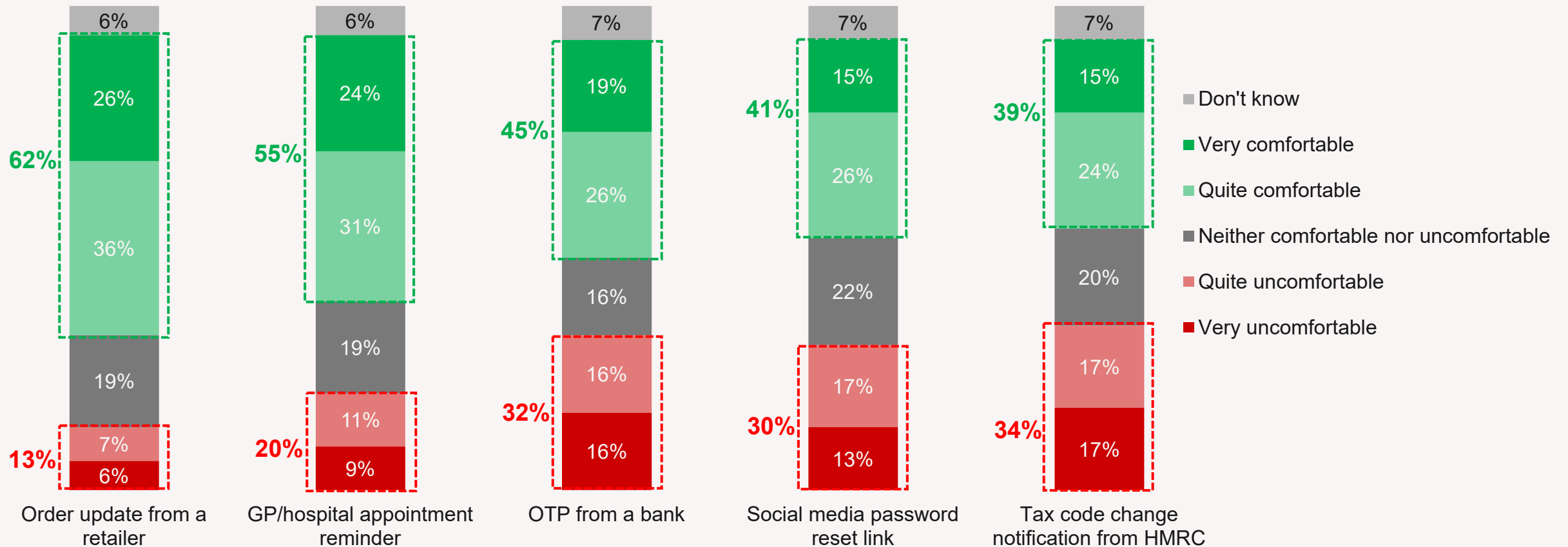
Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q11A-E. How comfortable or uncomfortable would you be if you received the following messages from a business/organisation via WhatsApp?

Base: All who are aware of WhatsApp (1842).

For those aware of app notifications, levels of comfort were more mixed when compared to both SMS and WhatsApp, although respondents were generally comfortable receiving these A2P messages

Levels of comfort/discomfort when receiving specific A2P messages via App notifications

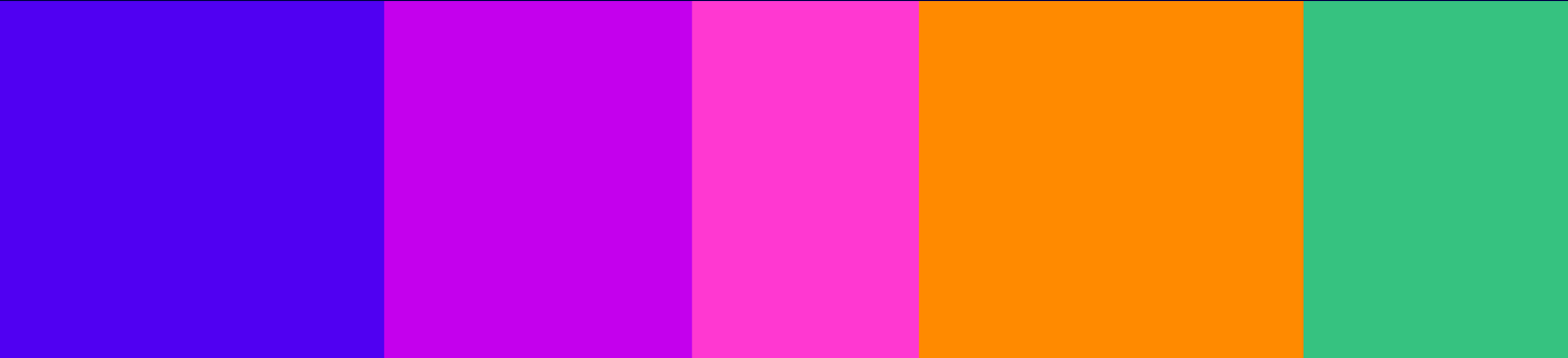


Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q13A-E. How comfortable or uncomfortable would you be if you received the following messages from a business/organisation via a smartphone app notification?

Base: All who are aware of app notifications (1370).

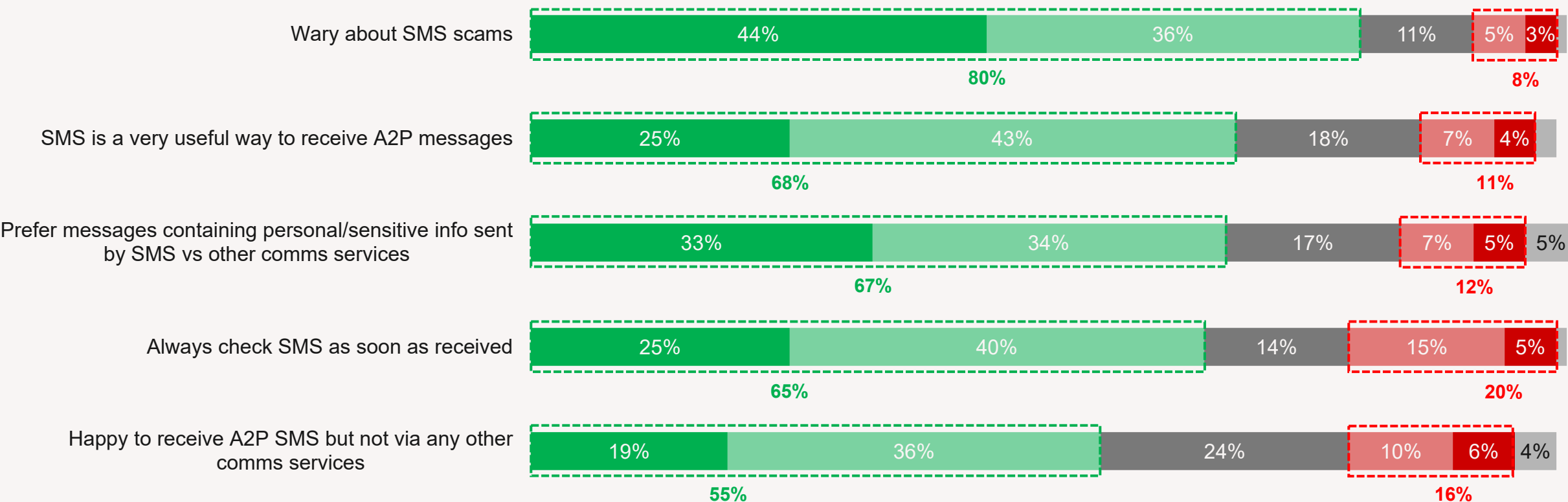
ATTITUDES TOWARDS A2P MESSAGES



Approximately two thirds agreed that SMS is a very useful way to receive A2P messages, while a similar proportion preferred to have messages with personal/sensitive info sent via SMS vs other messaging services

Levels of agreement/disagreement with statements

■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know



Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

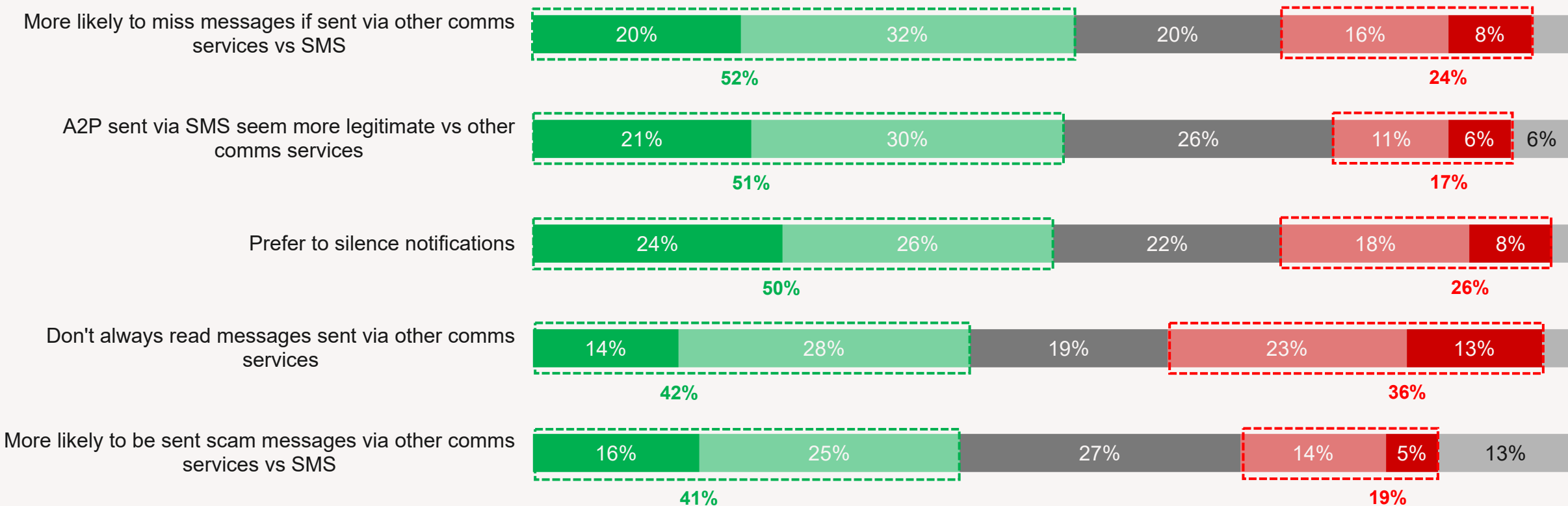
Question: Q14-23. To what extent do you agree or disagree with the following statements?

Base: All with access to and usage of a smartphone (1946).

Around half agreed that A2P SMS seemed more legitimate than A2P via other message services, while a similar proportion felt they were more likely to miss messages from other messaging services vs SMS

Levels of agreement/disagreement with statements

■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know



Source: 2024 Application-to-Person (A2P) Consumer Research Survey.

Question: Q14-23. To what extent do you agree or disagree with the following statements?

Base: All with access to and usage of a smartphone (1946).