Online Personal Communication Services

- Conducted by YouGov on behalf of Ofcom

- Fieldwork Dates: 27th March 2023 – 28th March 2023

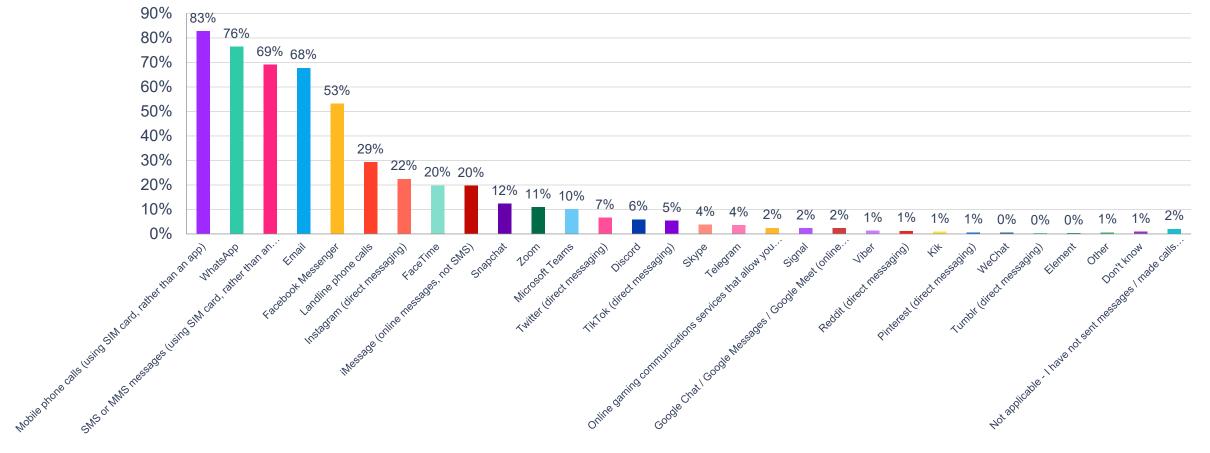**YouGov**®

Methodology

➢ Fieldwork dates: 27th to 28th March 2023

➢ Sample: 2128 UK adults

➢ The survey was carried out online using YouGov's online panel

➢ The figures have been weighted and are representative of all UK adults (aged 16+)

➢ Bases referred to are unweighted

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Mobile phone calls were the most widely used personal communication method in the last 3 months

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- A vast majority of people have communicated using their mobile phone in the last three months, either via a call (83%) or SMS messages (69%)
- WhatsApp is the most popular online personal communication service, and has been used by over three quarters of UK adults (76%)
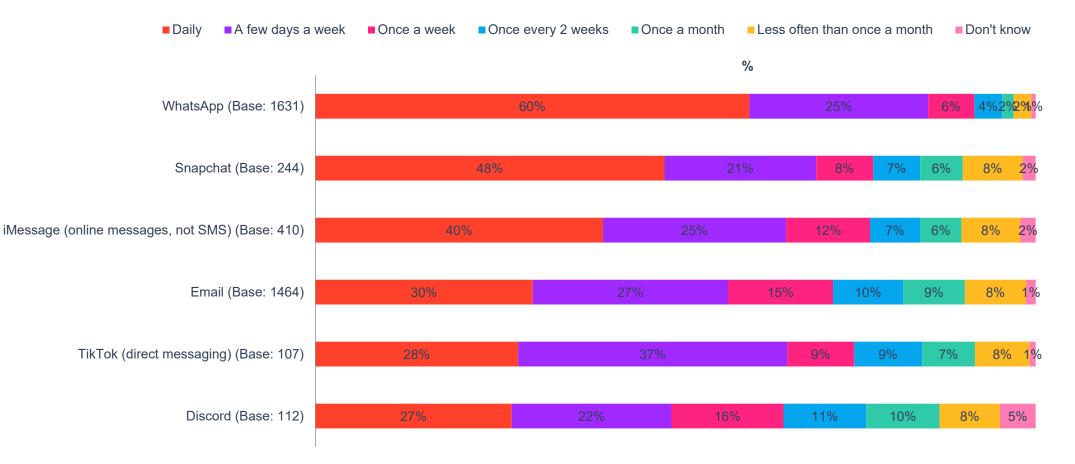- Less than a third (29%) have made landline phone calls in this time period

Base: All UK Adults 16+ (2128)

ROC_Q1. For the following question, please only select the services that you have used to communicate directly with people that you know outside of work (i.e. friends and family)...Which, if any, of the following communications services have you used to send messages/ make calls on in the past three months (i.e. since December 2022) for personal purposes (i.e. not work related)? (This can include voice, video and text messaging) Please select all that apply. If you have not communicated directly with anyone outside of work in the past 3 months please select the "Not applicable" option.

6 in 10 WhatsApp users use the app for personal communication everyday

- Amongst users, WhatsApp has the highest proportion that make use of it daily (60%)
- Direct messaging on TikTok has the biggest proportion of users who utilise it a few days a week (37%)

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■ Daily ■ A few days a week ■ Once a week ■ Once every 2 weeks ■ Once a month ■ Less often than once a month ■ Don't know

%

	Daily	A few days a week	Once a week	Once every 2 weeks	Once a month	Less often than once a month	Don't know
WhatsApp (Base: 1631)	60%	25%	6%	4%	2%	2%	%
Snapchat (Base: 244)	48%	21%	8%	7%	6%	8%	2%
iMessage (online messages, not SMS) (Base: 410)	40%	25%	12%	7%	6%	8%	2%
Email (Base: 1464)	30%	27%	15%	10%	9%	8%	1%
TikTok (direct messaging) (Base: 107)	28%	37%	9%	9%	7%	8%	1%
Discord (Base: 112)	27%	22%	16%	11%	10%	8%	5%

6 in 10 WhatsApp users use the app for personal communication everyday (continued)

- Amongst users, WhatsApp has the highest proportion that make use of it daily (60%)
- Direct messaging on TikTok has the biggest proportion of users who utilise it a few days a week (37%)
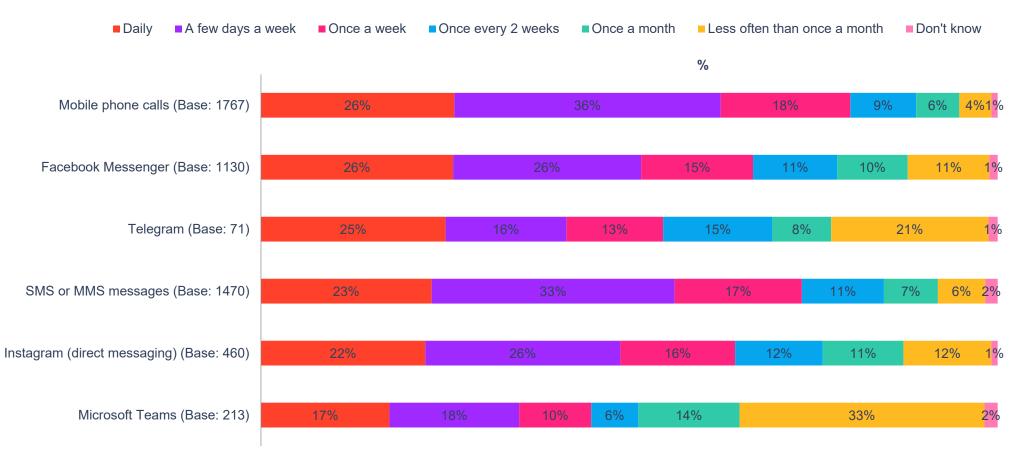

■ Daily ■ A few days a week ■ Once a week ■ Once every 2 weeks ■ Once a month ■ Less often than once a month ■ Don't know

%

	Daily	A few days a week	Once a week	Once every 2 weeks	Once a month	Less often than once a month	Don't know
Mobile phone calls (Base: 1767)	26%	36%	18%	9%	6%	4%	1%
Facebook Messenger (Base: 1130)	26%	26%	15%	11%	10%	11%	1%
Telegram (Base: 71)	25%	16%	13%	15%	8%	21%	1%
SMS or MMS messages (Base: 1470)	23%	33%	17%	11%	7%	6%	2%
Instagram (direct messaging) (Base: 460)	22%	26%	16%	12%	11%	12%	1%
Microsoft Teams (Base: 213)	17%	18%	10%	6%	14%	33%	2%

6 in 10 WhatsApp users use the app for personal communication everyday (continued)

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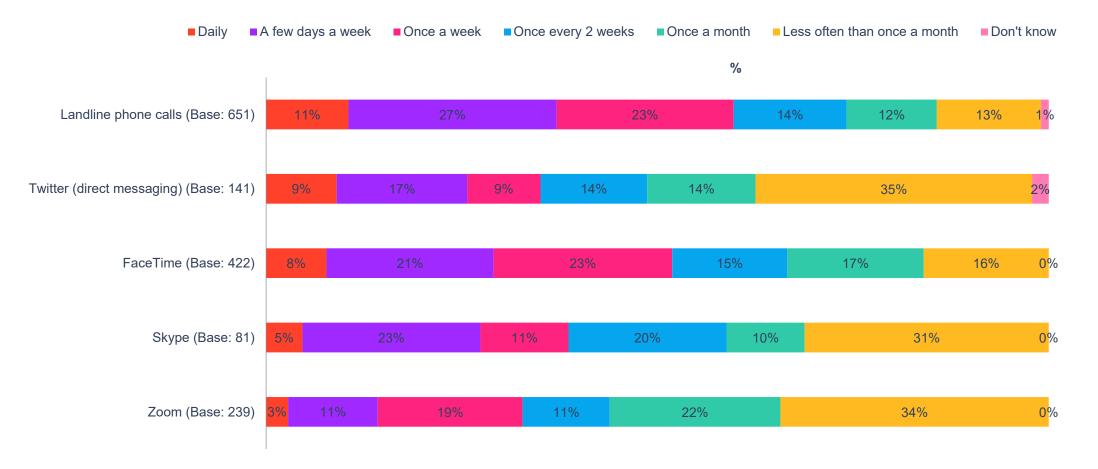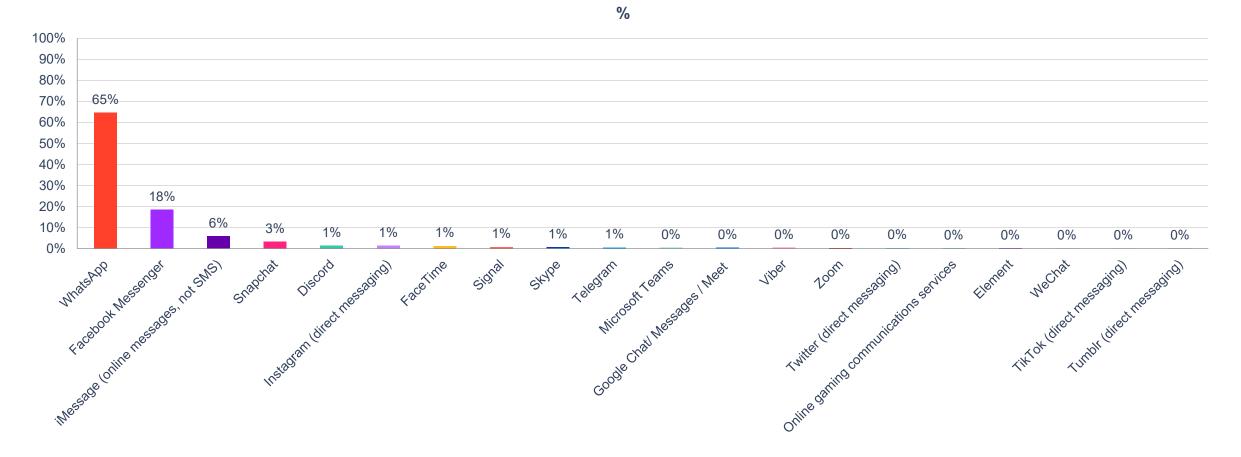
■ Daily ■ A few days a week ■ Once a week ■ Once every 2 weeks ■ Once a month ■ Less often than once a month ■ Don't know

%

	Daily	A few days a week	Once a week	Once every 2 weeks	Once a month	Less often than once a month	Don't know
Landline phone calls (Base: 651)	11%	27%	23%	14%	12%	13%	1%
Twitter (direct messaging) (Base: 141)	9%	17%	9%	14%	14%	35%	2%
FaceTime (Base: 422)	8%	21%	23%	15%	17%	16%	0%
Skype (Base: 81)	5%	23%	11%	20%	10%	31%	0%
Zoom (Base: 239)	3%	11%	19%	11%	22%	34%	0%

Base: All UK Adults 16+ who have used a communication service in past 3 months for personal use (71 – 1631)

ROC_Q2. Still thinking about the past three months (i.e. since December 2022)...How frequently have you used each of the following communication services to send messages / make calls for personal purposes (i.e. not work related)? (Please select the option that best applies in each row)

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The top three online communication services most likely to be selected for main personal usage are WhatsApp (65%), Facebook messenger (18%) and iMessage (6%)
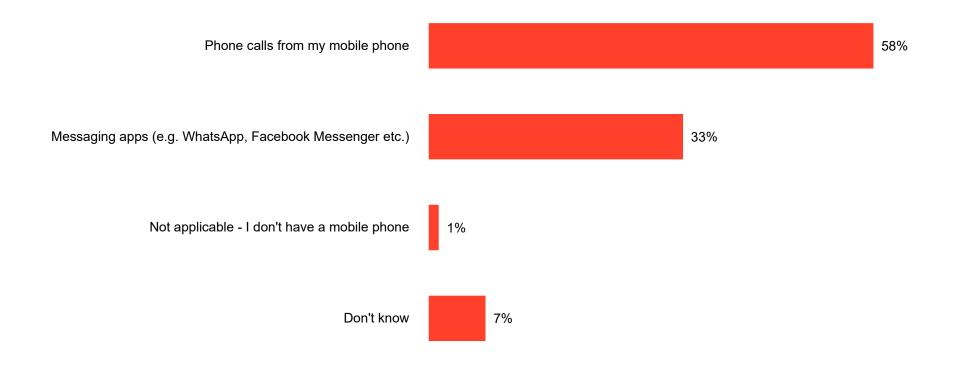
%

Base: All UK Adults 16+ who have used an ONLINE communication service in past 3 months for personal use (1883)

ROC_Q3. Which **ONE** of the following would you describe as your **MAIN** online communication service for personal use? (Please select your answer using the dropdown box provided)

The majority of adults would forgo mobile phone calls over messaging apps for 24 hours, if forced to

- Almost 6 in 10 adults (58%) would prefer to go without phone calls for a day
- Only one third would rather be without their messaging apps
- 7% are unsure as to which form of communication they would rather go without

Phone calls from my mobile phone — 58%

Messaging apps (e.g. WhatsApp, Facebook Messenger etc.) — 33%

Not applicable - I don't have a mobile phone — 1%

Don't know — 7%
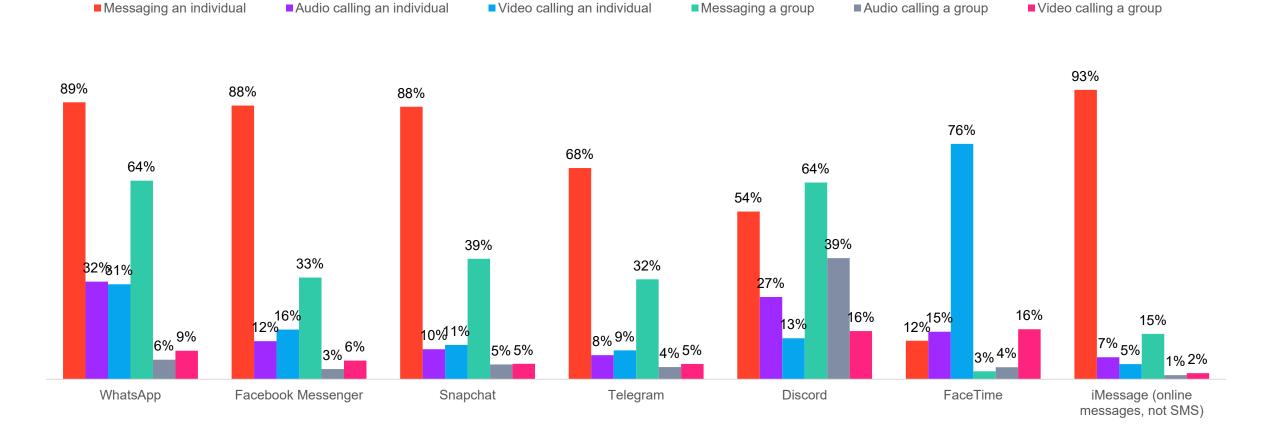
ROC_Q4. For the following question, please imagine you had to go without one of the following services on your mobile phone for 24 hours. Please do not take into account the need to call the emergency services. Which of the following would you choose to go without? (Please select the option that best applies. If you do not have a mobile phone please select the "Not applicable" option)

Instagram (direct messaging) is mostly used for messaging individuals, whereas WhatsApp and Discord are used more for messaging groups

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- Amongst users, Instagram (direct messaging) has the highest proportion of those who use it for messaging individuals
- Discord and WhatsApp are more prevalent when it comes to messaging a group (64%)
- Zoom's primary purpose is group video calling (75%), and FaceTime is for one-on-one video calls

■ Messaging an individual ■ Audio calling an individual ■ Video calling an individual ■ Messaging a group ■ Audio calling a group ■ Video calling a group

	WhatsApp	Facebook Messenger	Snapchat	Telegram	Discord	FaceTime	iMessage (online messages, not SMS)
Messaging an individual	89%	88%	88%	68%	54%	12%	93%
Audio calling an individual	32%	12%	10%	8%	27%	15%	7%
Video calling an individual	31%	16%	11%	9%	13%	76%	5%
Messaging a group	64%	33%	39%	32%	64%	3%	15%
Audio calling a group	6%	3%	5%	4%	39%	4%	1%
Video calling a group	9%	6%	5%	5%	16%	16%	2%

Instagram (direct messaging) is mostly used for messaging individuals, whereas WhatsApp and Discord are used more for messaging groups (continued)

YouGov

- Amongst users, Instagram (direct messaging) has the highest proportion of those who use it for messaging individuals
- Discord and WhatsApp are more prevalent when it comes to messaging a group (64%)
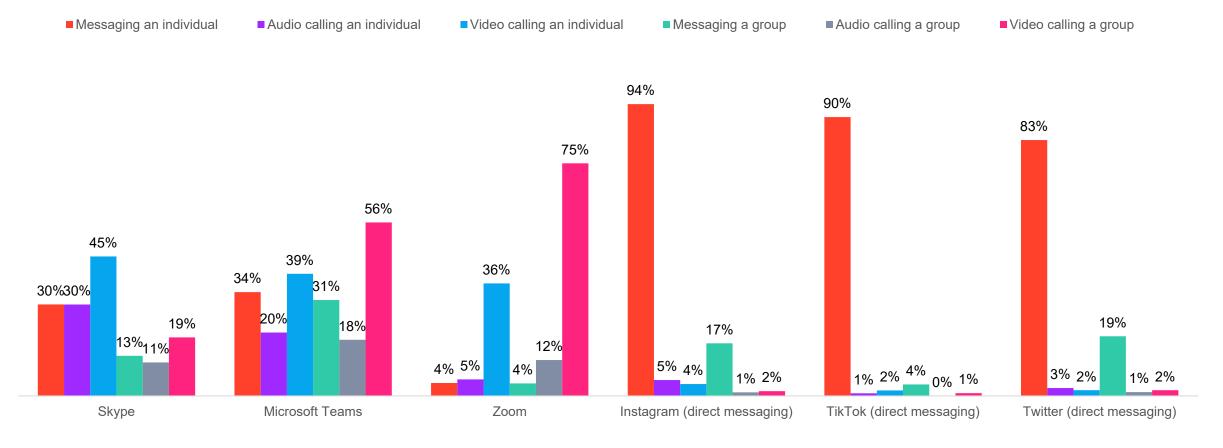- Zoom's primary purpose is group video calling (75%), and FaceTime is for one-on-one video calls

Legend:
- ■ Messaging an individual
- ■ Audio calling an individual
- ■ Video calling an individual
- ■ Messaging a group
- ■ Audio calling a group
- ■ Video calling a group

Skype: 30%, 30%, 45%, 13%, 11%, 19%
Microsoft Teams: 34%, 20%, 39%, 31%, 18%, 56%
Zoom: 4%, 5%, 36%, 4%, 12%, 75%
Instagram (direct messaging): 94%, 5%, 4%, 17%, 1%, 2%
TikTok (direct messaging): 90%, 1%, 2%, 4%, 0%, 1%
Twitter (direct messaging): 83%, 3%, 2%, 19%, 1%, 2%

'It's free' is the most important factor when considering which online communication service usage to use

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- When asked to select their top three most important factors for personal online communications, over half (53%) selected 'It's free to use'
- This is followed by 'It's used by my friends' (37%) and 'It's used by my family'
- The factor least likely to be chosen was 'It has an attractive design'

%

Factor	%
It's free to use	53%
It's used by my friends	37%
It's used by my family	33%
It's easy to use	32%
It's convenient to use	25%
It has good security and encryption	20%
It has useful functionalities	12%
I trust the service and it has a good…	12%
It has a strong data policy and privacy…	11%
The app works on all of my devices	10%
Used by wider social personal contacts	9%
It's easy to install / set up an account	7%
It's a popular service	6%
I already use other services from the…	2%
It provides entertainment value	1%
It has an attractive design	1%
Other	1%
Don't know	4%

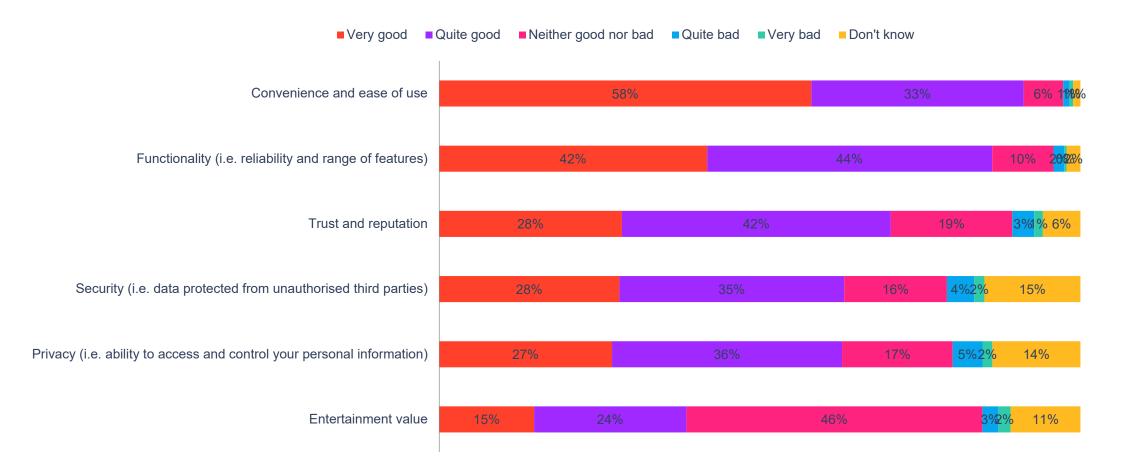*Base: All UK Adults 16+ who have used an ONLINE communication service in past 3 months for personal use (1883*

ROC_Q6. Which THREE, if any, of the following factors are MOST important to you when considering which online communication service to use for personal use? (Please select up to three options. If you don't use any online communications service please select "Not applicable"

When adults were asked about their main online communications service, 'Convenience and ease of use' and 'Functionality' were most likely to be rated "Very good" (58% and 42%), whereas 'Entertainment value' had the lowest score for this (15%).

Legend: ■ Very good ■ Quite good ■ Neither good nor bad ■ Quite bad ■ Very bad ■ Don't know

Aspect	Very good	Quite good	Neither good nor bad	Quite bad	Very bad	Don't know
Convenience and ease of use	58%	33%	6%	1%	1%	1%
Functionality (i.e. reliability and range of features)	42%	44%	10%	2%	2%	2%
Trust and reputation	28%	42%	19%	3%	1%	6%
Security (i.e. data protected from unauthorised third parties)	28%	35%	16%	4%	2%	15%
Privacy (i.e. ability to access and control your personal information)	27%	36%	17%	5%	2%	14%
Entertainment value	15%	24%	46%	3%	2%	11%

Base: All UK Adults 16+ who have used an ONLINE communication service in past 3 months for personal use (1883)

ROC_Q7. How good or bad do you think **[Main OCS]** is on the following aspects?

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Users with bad experiences were most likely to reduce their usage of the service when it comes to issues regarding 'Trust and reputation' (29%), whereas almost three-quarters did nothing (73%) when they experienced issues with 'Entertainment value'

Legend:
- I reduced my usage of this service
- I raised a complaint
- I did something else
- I did nothing
- Don't know/ can't recall

Trust and reputation
- 29%
- 9%
- 7%
- 54%
- 8%

Security (i.e. data protected from unauthorised third parties)
- 26%
- 5%
- 10%
- 53%
- 7%

Privacy (i.e. ability to access and control your personal information)
- 24%
- 4%
- 13%
- 50%
- 9%

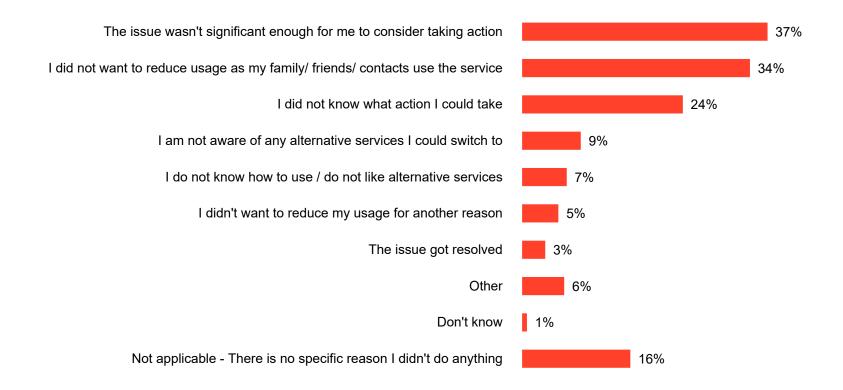**Entertainment value**
- 6%
- 7%
- 7%
- 73%
- 7%

Base: All UK Adults 16+ Who Have Had a Bad Experience on Their Main Online Communication Service (67 - 98)

ROC_Q8a. You rated the following aspects of **[Main OCS]** as either "quite bad" or "very bad". Which, if any, of the following actions have you made as a results of a bad experience with the following aspect(s)? (Please select all that apply)

Insignificance or dependency discourage taking action when issues occur with main online communication services

- Among the respondents who did nothing regarding the issues with their main online communication service, over a third did so due to lack of significance (37%) and a similar proportion cited dependency due to family and friends' usage (34%)
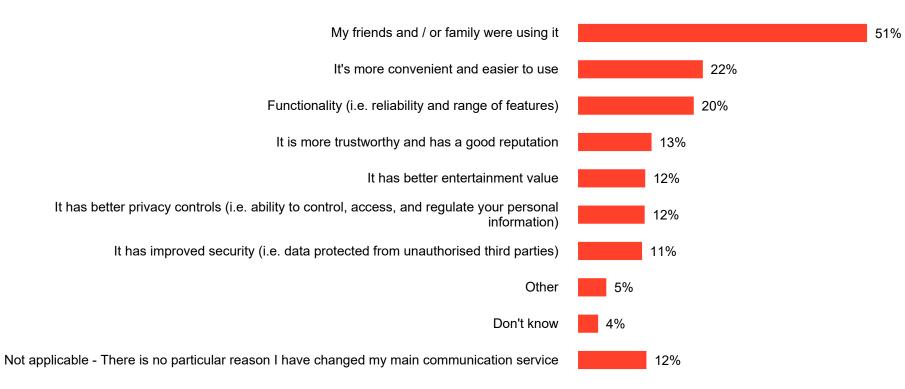- The least popular reason for inaction was the issue being resolved (3%)

The issue wasn't significant enough for me to consider taking action	37%
I did not want to reduce usage as my family/ friends/ contacts use the service	34%
I did not know what action I could take	24%
I am not aware of any alternative services I could switch to	9%
I do not know how to use / do not like alternative services	7%
I didn't want to reduce my usage for another reason	5%
The issue got resolved	3%
Other	6%
Don't know	1%
Not applicable - There is no specific reason I didn't do anything	16%

Base: All UK Adults 16+ Who Didn't Do Anything About Their Bad Experience on Their Main Online Communication Service (138)

ROC_Q9. You said you didn't do anything when you had a bad experience with one or more aspects of **[Main OCS]** . Which, if any, of the following are reasons why you didn't do anything? (Please select all that apply. If there is no specific reason, please select the "Not applicable" option)

Users were most likely to switch their main online communication service because their friends or family were using the service switched to
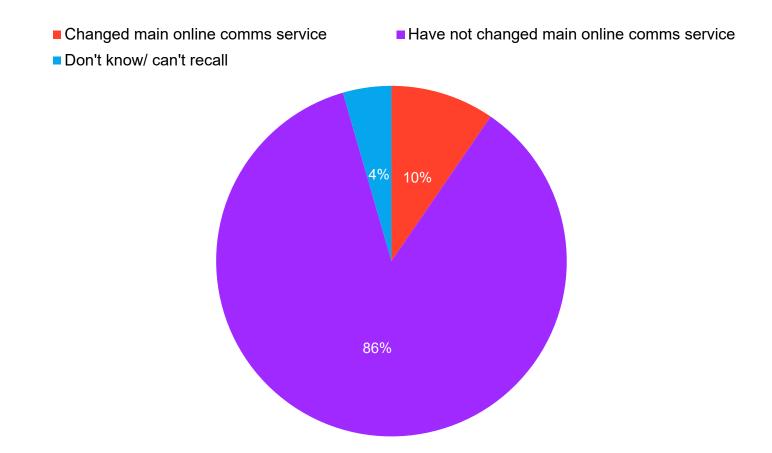
- The most significant factor in driving users to switch to a new service is its popularity amongst friends and family, accounting for over half (51%) of those who've changed main online communications service in the past 12 months
- Convenience / ease and functionality are each selected as the main reasons for switching amongst one in five (22% and 20%)
- Improved security was the least popular main reason at 11%

My friends and / or family were using it	51%
It's more convenient and easier to use	22%
Functionality (i.e. reliability and range of features)	20%
It is more trustworthy and has a good reputation	13%
It has better entertainment value	12%
It has better privacy controls (i.e. ability to control, access, and regulate your personal information)	12%
It has improved security (i.e. data protected from unauthorised third parties)	11%
Other	5%
Don't know	4%
Not applicable - There is no particular reason I have changed my main communication service	12%

Base: All UK Adults 16+ which have changed their main communication service in the past 12 months (178)

ROC_Q11. Which, if any, of the following is the **MAIN** reason you have changed your main online communication service to in the past 12 months? (Please select all that apply. If there is no particular reason you have changed your main online communication service please select the "Not applicable" option)

One in ten have changed their main online communication service in the past year, whereas 86% have remained loyal.

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- Changed main online comms service
- Have not changed main online comms service
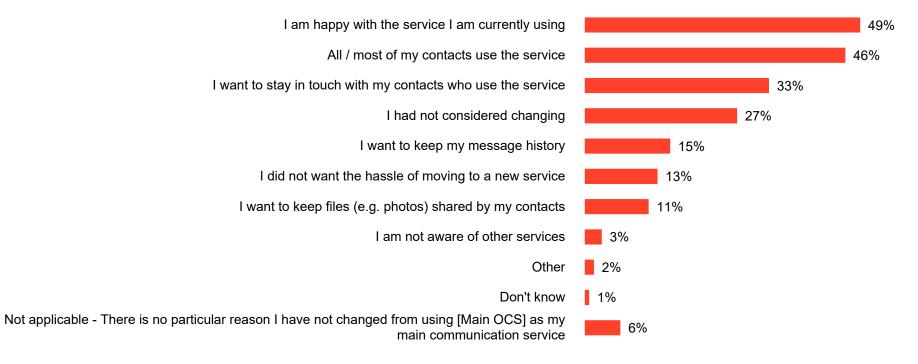- Don't know/ can't recall

Base: All UK Adults 16+ who have used a communication service in past 3 months for personal use (1883)

ROC_Q10. You said that the main online communications service you use is [**Main OCS**]. Thinking back to 12 months ago (i.e. March 2022)....Were you using a different main online communication service then, compared to what you are using now?

Happiness with the service is the most common reason for staying with the same main online communication service

- Almost half (49%) of those who've not changed main online communication service in the past 12 months have remained loyal due to being happy with the service
- A similarly high proportion say they haven't changed because the service is used by their contacts (46%)
- The lowest scoring reason was lack of awareness of other services (3%)

Reason	%
I am happy with the service I am currently using	49%
All / most of my contacts use the service	46%
I want to stay in touch with my contacts who use the service	33%
I had not considered changing	27%
I want to keep my message history	15%
I did not want the hassle of moving to a new service	13%
I want to keep files (e.g. photos) shared by my contacts	11%
I am not aware of other services	3%
Other	2%
Don't know	1%
Not applicable - There is no particular reason I have not changed from using [Main OCS] as my main communication service	6%

Base: All UK Adults 16+ whose main communication service was the same 12 months ago (1620)

ROC_Q12. You said you have been using [**Main OCS**] as your main online communication service for the past 12 months. Which, if any, of the following is the **MAIN** reason you have continued using as your main online communication service? (Please select all that apply. If there is no particular reason you have used not changed from using as your main online communication service, please select the "Not applicable" option)

Users are unlikely to change their main online communication service in the near future
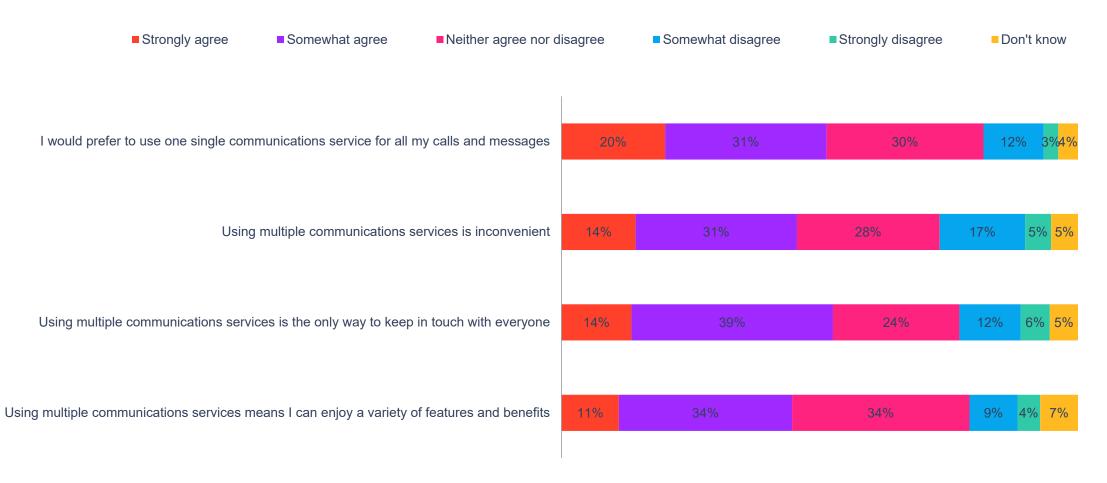
- For those who've used an online communication service in the past 12 months, there is a strong sense of loyalty, with 47% strongly agreeing that they are unlikely to stop using their main service
- Regarding privacy, only one in ten strongly agree that anyone should be contactable via their main service whether they are a user or not

Legend:
- ■ Strongly agree
- ■ Somewhat agree
- ■ Neither agree nor disagree
- ■ Somewhat disagree
- ■ Strongly disagree
- ■ Don't know

Statement	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
I am very unlikely to stop using [Main OCS] in the near future as it is an important way for me to keep in touch with friends and family	47%	37%	10%	3%	2%	1%
[Main OCS] provides a safe environment in which to keep in touch with my friends and family	27%	46%	18%	3%	1%	5%
I trust [Main OCS] to keep my data and messages secure	22%	41%	20%	7%	3%	7%
It should be possible for anyone to contact me on [Main OCS] , even from other communications service that I do not use	11%	25%	26%	16%	12%	10%
I would use a different communications service as my main service if I could still use it to communicate with users of [Main OCS]	10%	24%	35%	14%	5%	13%
It should be possible for me to contact anyone using [Main OCS] , even if they don't use it	9%	23%	28%	21%	11%	9%

Base: All UK Adults 16+ with a main online communication service (1883)

ROC_Q14. To what extent, do you agree or disagree with the following statement?

One in five respondents strongly agree that they would prefer to use one communication service (20%), whilst one in ten think variety is a strength to using multiple services (11%)

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

I would prefer to use one single communications service for all my calls and messages: 20% | 31% | 30% | 12% | 3% | 4%

Using multiple communications services is inconvenient: 14% | 31% | 28% | 17% | 5% | 5%

Using multiple communications services is the only way to keep in touch with everyone: 14% | 39% | 24% | 12% | 6% | 5%

Using multiple communications services means I can enjoy a variety of features and benefits: 11% | 34% | 34% | 9% | 4% | 7%
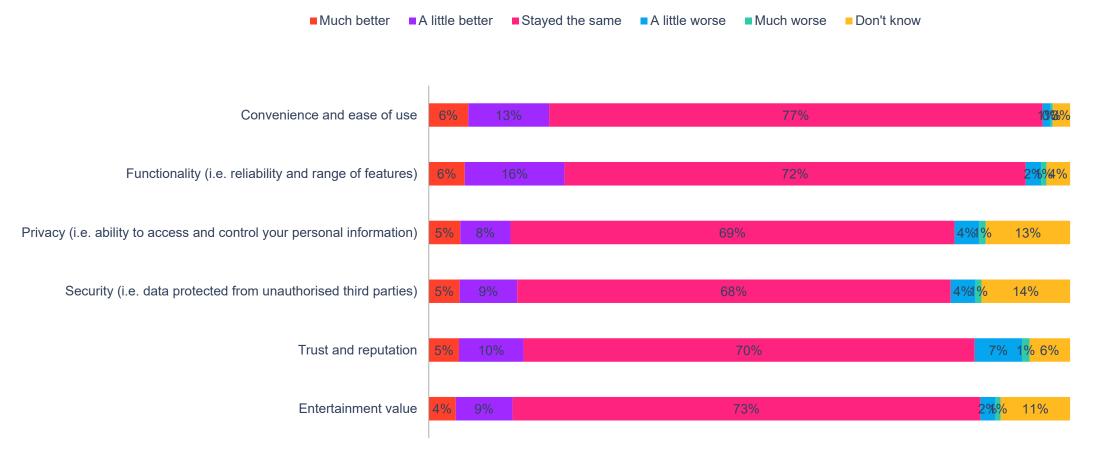
Base: All UK Adults 16+ (2128)

ROC_Q14. To what extent, do you agree or disagree with the following statement?

Perceptions of main online communications services have changed very little over the past 12 months

YouGov

- For the majority, their experience with the various services provided by their main online communications service has stayed the same over the past 12 months
- 6% said that 'Functionality' is much better, and this is the same for 'Convenience and ease of use'
- The service element most likely to have worsened is 'Trust and reputation' at 7% (a little worse).

Legend: ■ Much better ■ A little better ■ Stayed the same ■ A little worse ■ Much worse ■ Don't know

Service	Much better	A little better	Stayed the same	A little worse	Much worse	Don't know
Convenience and ease of use	6%	13%	77%	1%	0%	3%
Functionality (i.e. reliability and range of features)	6%	16%	72%	2%	1%	4%
Privacy (i.e. ability to access and control your personal information)	5%	8%	69%	4%	1%	13%
Security (i.e. data protected from unauthorised third parties)	5%	9%	68%	4%	1%	14%
Trust and reputation	5%	10%	70%	7%	1%	6%
Entertainment value	4%	9%	73%	2%	1%	11%

Base: All UK Adults 16+ with a main online communication service (1883)

ROC_Q15. Still thinking about the past 12 months (i.e. since March 2022)...To what extent, has your opinion on the following services provided by **[Main OCS]** become better, or worse, or has it stayed the same? (Please select one option on each row)