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FAMILY COMMUNICATION

Behavioral differences between US
families with low and high service usage

An Ericsson Consumer Insight Summary Report
September 2016

CONTENTS

METHODOLOGY

Focus groups and at-home interviews

For the purpose of this report, Ericsson ConsumerLab conducted five focus groups with participants based in the US. Of these focus groups, 2 were carried out with parents, 2 with girls aged 14-15 and 1 with boys aged 14-15.

Additionally, 12 at-home interviews were conducted with families in the San Francisco area, which included both parents and at least 1 child in the 12-15 year old age range.

Online study

Further to this, Ericsson ConsumerLab carried out an online study with parents in 1,005 families, as well as 570 children aged 12-15. The results of this study represent middle class families in the US that have 2 working parents, with at least 1 working full time, and children aged 12-15.

US

THE VOICE OF THE CONSUMER

Ericsson ConsumerLab has more than 20 years' experience studying people's behaviors and values, including the way they act and think about ICT products and services. Ericsson ConsumerLab provides unique insights on market and consumer trends.

Ericsson ConsumerLab gains its knowledge through a global consumer research program based on interviews with 100,000 individuals each year, in more than 40 countries – statistically representing the views of 1.1 billion people.

Both quantitative and qualitative methods are used, and hundreds of hours are spent with consumers from different cultures. Ericsson ConsumerLab has representatives throughout Ericsson's global presence, developing an international understanding of the ICT market and business models.

All reports can be found at:
www.ericsson.com/consumerlab

FAMILIES ARE DIFFERENT

From the way they communicate and by which services, to how they create rules and spend time together, every family is different.

In this report, Ericsson ConsumerLab explores how families in the US behave when it comes to communication, rules and distractions, as well as the positive and negative effects of communication technology within the family unit.

In order to unveil key differences, we have compared the behavior of families with high usage of communication services (such as Instagram, Snapchat, WhatsApp and more), with that of families with low usage of services. The first group will be referred to as 'explorative families' (high usage) and the second as 'traditional families' (low usage).

KEY FINDINGS

> ### Different families – low and high service users

Across all families, there are two equally sized groups that demonstrate extreme behavior; 20 percent use mostly text and voice in their family communication, whilst 20 percent are very frequent users of most services.

20%
use traditional methods

20%
use most services

> ### Children and parents behave alike

If the parents are low users of services, their children seem to be the same. Children in traditional families have much lower usage than children in explorative families. Only 60 percent have tried Facebook and only 46 percent have continued to use it.

Only
46%
of children in traditional families use Facebook

> ### Higher knowledge of communication services among parents means greater control

As parents' level of knowledge communication services increases, rules, tracking and monitoring of children's technology usage also increases.
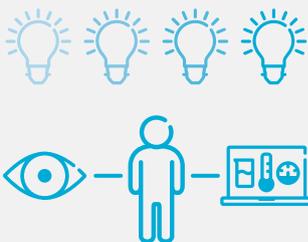
> ### Disruption of valuable family time

The more members of the family engage with devices during family time, the more disruptive both parents and children think it is. Within explorative families 31 percent of children say it is very disruptive.

> ### Explorative families see more benefits to technology, but also have more concerns

The more communication services that are used, the more positive effects are seen, with 40 percent of explorative families very positive. However, more concerns also appear.

40%
are very positive

FROM TRADITIONAL TO EXPLORATIVE

The 2015 Ericsson ConsumerLab report 'Bringing Families Closer' found that the majority of families mainly use text and voice services to communicate with each other. However, 20 percent of all families use many other services to communicate amongst themselves, such as WhatsApp, Snapchat, Instagram, Facebook and more.

There is a clear relationship between how frequently services are used and the number of services used; families with low usage (traditional) mainly use text and voice, whilst families with high usage (explorative) access a wider range of services. The age of the parents is also an important factor; the younger they are the more likely their family is to use more services. However, this is not the whole story, as will be seen in this report.

Traditional families – low usage

As might be expected, very few parents in traditional families have tried services beyond text and voice. If they have tried an additional service, it is usually one that is more established, such as Facebook or Skype. Interestingly however, few of those who do try these services continue to use them. Only 1 in 10 continues to use them within family communication, whilst 1 in 10 continues to use them, but only outside of the family.

In regards to awareness of services, one quarter of parents in traditional families have not heard of applications such as KIK, ooVoo and WhatsApp. They are, however, far more likely to be aware of new services that have most recently received high exposure, such as Snapchat and Vine.

Both the children and parents of traditional families appear to be slow adopters of new services. In comparison with explorative families, very few children of traditional families use services such as Instagram, Snapchat, KIK and WhatsApp, and only 46 percent are users of Facebook.

## Explorative families – high usage

When it comes to explorative families, it's a completely different story. Most parents in these families have tried all of the latest services and utilize them in family communication. Even if they haven't used them, they are aware of these new services and are eager to try them out. And if they try out a new service and continue to access it, they will also use it to communicate with family members.

The children of explorative families also try out new services to a higher degree than those in other families. Almost all have tried new communication services and continue to use them.

Families with low service usage mainly use text and voice, whilst families with high usage access most services.

Figure 1: Parents' usage ● Parents' usage – explorative families ● Parents' usage – traditional families
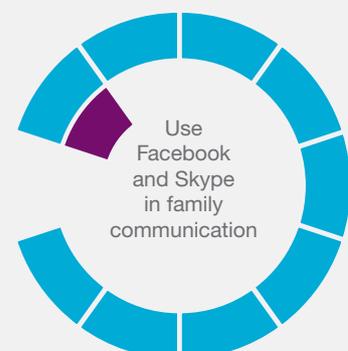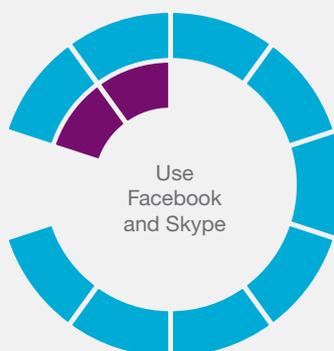
Have tried Facebook or Skype

Use Facebook and Skype

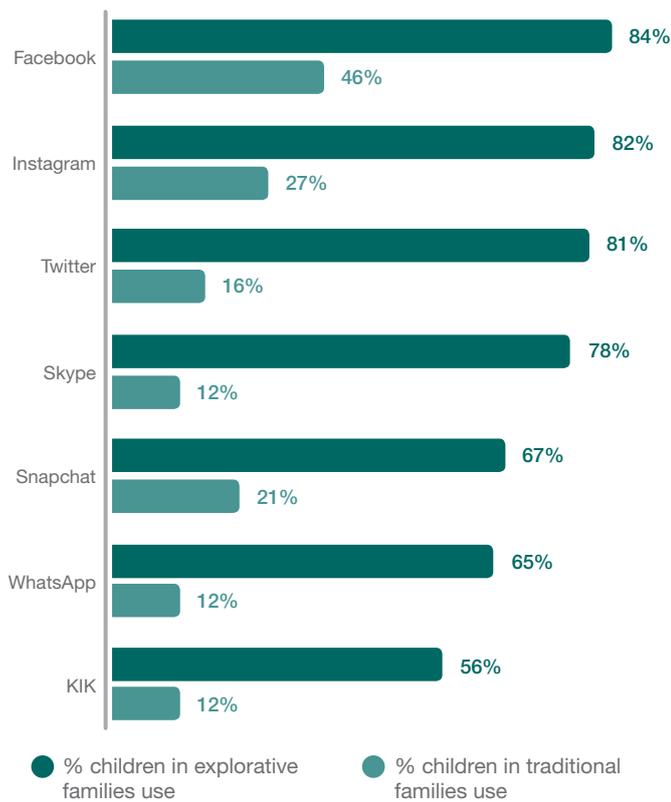Use Facebook and Skype in family communication

Source: Ericsson ConsumerLab, Bringing Families Closer, US, 2015

Base: US families with working parents and children aged 12-15

CHILDREN'S COMMUNICATION DIVIDE

We tend to believe that all children use the internet to the same degree, or at least are very keen users of most services. However, it was found that this is not the case, and usage can vary greatly.

Figure 2: Children's communication in general

Service	% explorative	% traditional
Facebook	84%	46%
Instagram	82%	27%
Twitter	81%	16%
Skype	78%	12%
Snapchat	67%	21%
WhatsApp	65%	12%
KIK	56%	12%

● % children in explorative families use
● % children in traditional families use

Source: Ericsson ConsumerLab, Bringing Families Closer, US, 2015
Base: US families with working parents and children aged 12-15

For example, in traditional families, 30 percent of children only use text and voice services, whilst all children in explorative families use text and voice, as well as at least 1 or 2 other services (these figures refer to communication in general, and not only within the family).

Thus, 70 percent of children from traditional families do use at least 1 service in addition to text and voice, with 46 percent also using this service within the family unit. This additional service has often been on the market for some time, such as Facebook, and is usually used to communicate with siblings, as their parents are mainly using text and voice. Few use Instagram and Snapchat, despite these services being highly prevalent amongst explorative children.

Evidently, there is a divide between these two groups when it comes to how many services they use and how frequently, with children in traditional families being more cautious when it comes to adopting new services.

This is clearly demonstrated by Figure 2, which shows that whilst almost half of children in traditional families use Facebook, it is still fewer than the number of children from explorative families using KIK – the least popular service amongst both groups.

Usage of communication services varies greatly between children from explorative families and children from traditional families.

Children are one step ahead of their parents

In explorative families, parents are eager to try out new services. However, if they're using the same services as their children, some children develop a privacy strategy to avoid parental intrusion, such as setting up several accounts. And, whilst 16 percent of children do not care if their parents are using the same services as themselves, most would like to develop a privacy strategy if they don't already have one in place.

Source: Ericsson ConsumerLab, Bringing Families Closer, US, 2015
Base: US families with working parents and children aged 12-15

Figure 3: Children's strategy to have several accounts

● Have a strategy — 25%
● Would really like a strategy — 20%
● Some interest in having a strategy — 39%
● Don't care — 16%
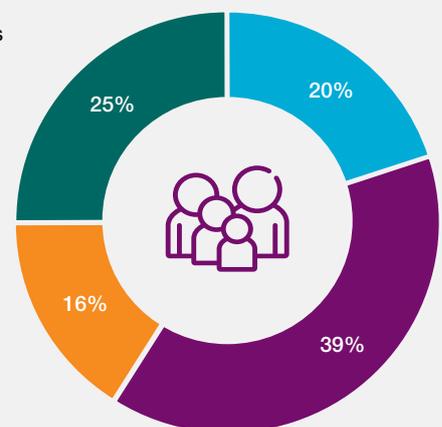
FAMILY TIME DISTRACTIONS

In today's connected society, the urge to regularly look at devices in order to check social media feeds, read the latest email or watch YouTube clips is recognized by many. And whilst this behavior is becoming common during family time, there are interesting differences between traditional and explorative families.

The majority of explorative families say that family members are often engaged with their devices during family time. On the other hand, the majority of traditional families say that this behavior rarely occurs, whilst one in five say it never happens

> **A clear majority of explorative parents use gatekeeping, tracking and monitoring of smartphone usage, whilst only a minority of traditional parents do so**

Further to this, in traditional families, 31 percent of children say they never or hardly ever use their devices during family time, as it is not allowed or is seen as inappropriate. However, only four percent of children in explorative families say the same.

The more family members engage with their devices during family time, the more disruptive the children think it is. Within explorative families, 31 percent of children say it is very disruptive, while in traditional families only 14 percent say the same. This is, of course, likely due to the fact that traditional families engage in their devices less frequently. Aside from device usage, there is also a notable split in the other family time activities the two groups partake in. In traditional families the main activities are conversations, movie nights or board games, whilst computer games are as common an activity in explorative families. This further highlights their differences.

Control of usage depends on parents' technology knowledge

Both explorative parents and traditional parents say that they have strict rules for their children on how to behave. However, with their higher knowledge of communication services, explorative parents are more aware of how to implement rules for accessing services and of how to monitor their children's usage.

A clear majority of explorative parents are executing gatekeeping, tracking and monitoring of smartphone usage, whilst only a minority of traditional parents are doing so. More explorative parents are also utilizing rules involving technology, such as using software to review their children's text, and having a written contract between parent and child about how to use mobile devices.

> **31 percent of traditional children say they never or hardly ever use their devices during family time**

DIFFERENT MINDSETS

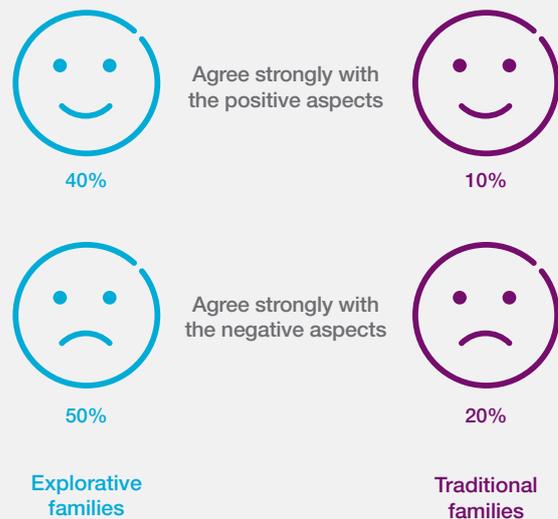### Positive and negative aspects of using communication services

Overall, the majority of families are optimistic about using communication services. All agree that having contact with each other throughout the day, as well as the possibility of easier logistics, has a very positive effect on the family unit.

Further to this, around 80 percent of explorative families believe they are a happier family, have more communication with each other and have a better knowledge of their partner or children as a result.

And 40 percent of explorative families are even very positive, whilst just 10 percent of traditional families feel the same, demonstrating their reluctance to utilize communication services.

However, as technology usage increases, so too do the negative manifestations associated with it. For example, half of explorative families agree that they feel more stressed, and have less face-to-face contact with their partner and/or children and increased family tension.

Figure 4: Positive/negative feelings regarding a range of aspects of communication services

Agree strongly with the positive aspects

40% 10%

Agree strongly with the negative aspects

50% 20%

Explorative families **Traditional families**

Source: Ericsson ConsumerLab, Bringing Families Closer, US, 2015
Base: US families with working parents and children aged 12-15

Understanding differences between the two groups

Even if all families have smartphones and tablets, there is a difference in usage. There are two factors that explain this difference better than others – the age of the parents (the younger they are the more likely they are to use technology) and their knowledge and interest in technology.

Clearly, a defining characteristic of explorative families is their knowledge and interest in communication services. All the explorative families say they are up-to-date with available communication services, with 63 percent saying they are totally up to date, compared to just 16 percent of traditional families.

Traditional and explorative families also seem to have a different mindset when it comes to communication services. For traditional families, text and voice services, and possibly Facebook, are sufficient. This is in stark contrast to explorative families, who are keen followers of new technologies and will try any new service.

63 percent of explorative families say they are totally up to date with available communication services

80 percent of explorative families believe they are happier as a result of communication services

THE FUTURE OUTLOOK

As we head into the future, with increased online behavior, it is likely that traditional families will become more frequent in their usage of services, as well as increasing the number of services they access, whilst explorative families will continue to be heavy users. The gap between the two types of families may remain, as there will always be different levels of technology knowledge between the two. What is clear, however, is that increased uptake of services will depend on their simplicity, if they are to appeal to both groups.

Leading transformation through mobility

We are a world leader in the rapidly changing environment of communications technology – providing equipment, software and services to enable transformation through mobility.

Some 40 percent of global mobile traffic runs through networks we have supplied. More than 1 billion subscribers around the world rely every day on networks that we manage. With more than 39,000 granted patents, we have one of the industry's strongest intellectual property rights portfolios.

Our leadership in technology and services has been a driving force behind the expansion and improvement of connectivity worldwide. We believe that through mobility, our society can be transformed for the better. New innovations and forms of expression are finding a greater audience, industries and hierarchies are being revolutionized, and we are seeing a fundamental change in the way we communicate, socialize and make decisions together.

These exciting changes represent the realization of our vision: a Networked Society, where every person and every industry is empowered to reach their full potential.