



# Crossed Wires

How five tribes are  
changing the way  
Britain communicates



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A large, out-of-focus crowd of people at a festival or concert. In the foreground, a hand is raised, pointing upwards, wearing a colorful wristband. The scene is bathed in warm, golden light, suggesting a sunset or sunrise. The background is filled with the heads and shoulders of many people, creating a sense of a large gathering.

The insight revealed in this report is crucial for anyone who:

- Needs to communicate as part of their role, whether in marketing, advertising, HR, branding, PR, communications, policy, or government
- Recognises that a one-size-fits-all communications solution just doesn't work anymore, if it ever did
- Wants to gain a deeper understanding of the public and the changing way they use and consume communication

## PREFACE

**This report is the start of an evolving communications journey for Opinium and our clients.**

We all absorb information at different rates and prefer to be communicated with, by brands and organisations, in different ways. Some of us know that a compelling story or picture is more likely to sway our decisions, especially when viewed on social media. Yet others are more sceptical about the online communication revolution. We are nostalgic for days gone by and would rather listen to someone we know telling us something.

In a rapidly evolving world, behaviours, preferences and attitudes are changing faster than ever and these differences have never been more stark or more important. To convince people to buy products and services, to support charitable causes, or to vote for movements and political parties, we need to ensure that we maintain a deep understanding of how best to communicate. This means tailoring our messages to the right groups of people, delivering through the right mediums, and of course doing it at the right time.

Our research has uncovered five communication tribes, each with very distinctive communication preferences. Using an attitudinal segmentation approach we have narrowed down the population into these smaller segments. This report provides clear actionable insights, that we believe will enable clients to navigate the complex web of communication preferences and ultimately maximise the success of their marketing and communication activities.

As always, if you'd like a member of our team to explain how you can use this groundbreaking research to better communicate with your stakeholders, then please get in touch.



**James Endersby**  
// Managing Director  
[jamesendersby@opinium.co.uk](mailto:jamesendersby@opinium.co.uk)

A handwritten signature in dark ink, appearing to be 'James Endersby', written in a cursive style.

# INTRODUCING THE TRIBES



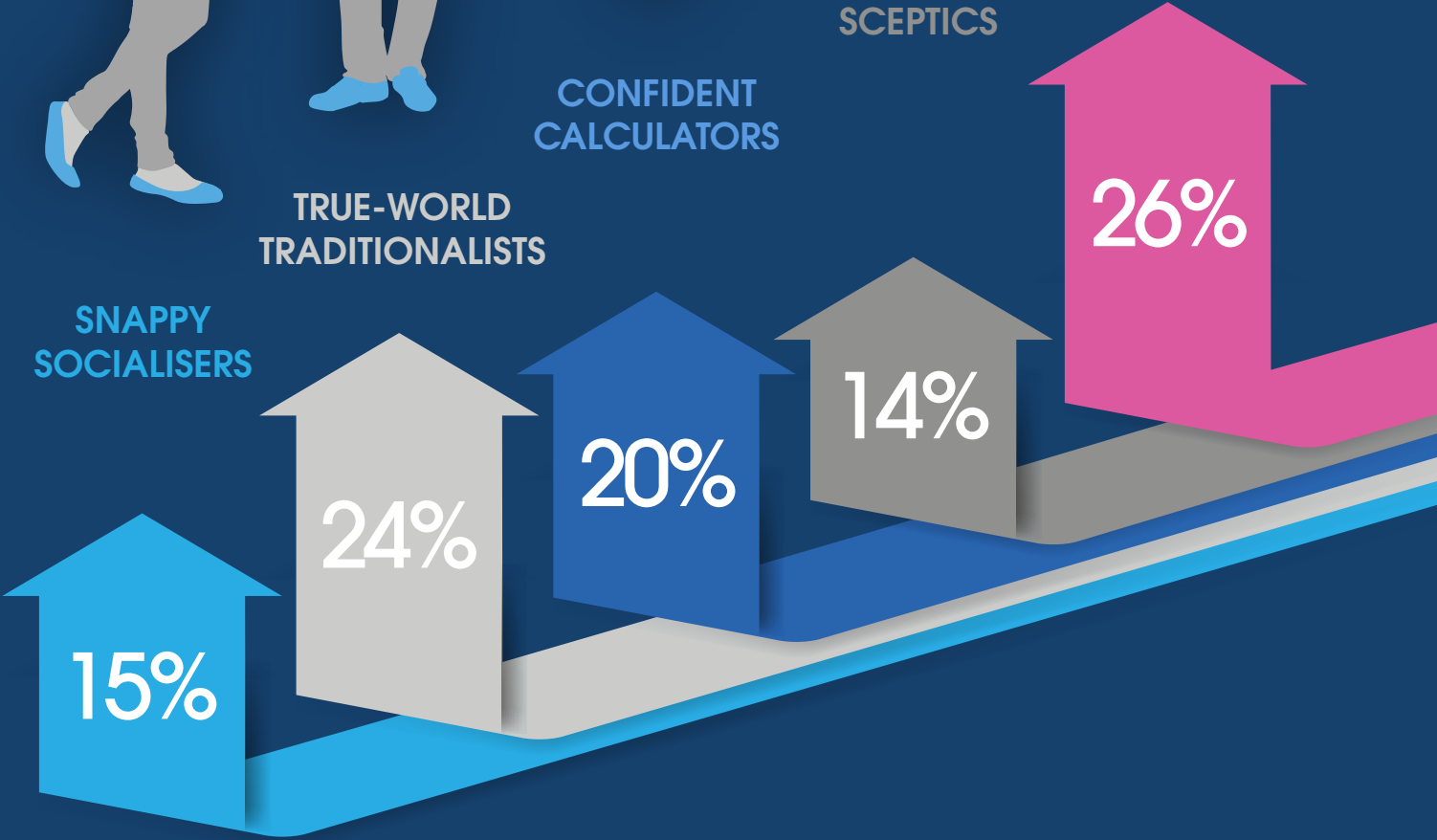
**BREEZY BELIEVERS**

**SELF-RELIANT SCEPTICS**

**CONFIDENT CALCULATORS**

**TRUE-WORLD TRADITIONALISTS**

**SNAPPY SOCIALISERS**





**SNAPPY  
SOCIALISERS**



**TRUE-WORLD  
TRADITIONALISTS**



**CONFIDENT  
CALCULATORS**



**SELF-RELIANT  
SCEPTICS**



**BREEZY  
BELIEVERS**

"I always come back from holiday with lots of photos"

80%

11%

49%

62%

59%

"Statistics are really important for understanding the world accurately"

46%

27%

77%

17%

44%

"Among my friends and family, I'm often the one taking photographs"

51%

3%

28%

39%

49%

"Numbers and charts don't reflect the way I see the world"

38%

64%

21%

69%

58%

"I tend to switch off when I hear numbers on the news"

13%

36%

1%

33%

48%

"Messages to my friends and family often contain plenty of pictures or emojis"

54%

9%

18%

22%

56%

"I tend to trust official sources of information and statistics"

52%

35%

58%

13%

51%

"I'm always in touch with my friends and family, no matter where I am"

85%

44%

49%

64%

62%

"Something isn't real unless I can point to a personal example"

17%

29%

5%

21%

46%

"I prefer to watch soaps and dramas, rather than news or documentaries"

38%

21%

6%

8%

46%

"I tend to form opinions quickly based on headlines I read online"

24%

15%

9%

8%

47%

# INTRODUCTION

It is almost a cliché to say that the way we communicate is changing at an unprecedented rate. New technologies and trends have combined to form a heady cyclone: the death of old methods, the proliferation of channels, the explosions of social media, the ever-shortening shelf life of popular culture.

But look past the BIG NUMBERS, and the true consequences of this shift in communication are trickier to understand. We can sometimes glimpse them in a certain trend, from restaurants popping up around the world on the popularity of an Instagram genre, to phrases that go from niche slang to international buzzwords in a matter of weeks.

Society is changing and being changed, but what does that mean in practice?

The past couple of years have demonstrated that, far from bringing us together, increased means of communication could be having the opposite effect.

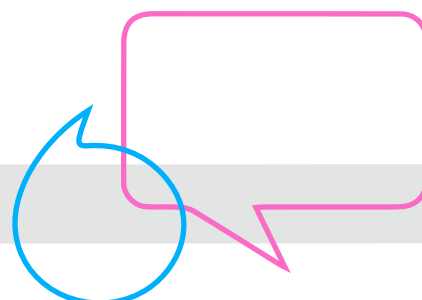
Things that many consider to be authoritative, attention-grabbing or engaging are seen by others to be untrustworthy, bland or uninspiring. Public views on the reliability of statistics range from near-evangelical faith to an all-encompassing cynicism, with important consequences for political and social debates.

**While numbers hold no influence for many, the story and shocking images of a single child can sway some of the most hardened attitudes.**

Are those whose mistrust in experts excited a storm during the EU referendum part of a small vocal minority, or is it the experts themselves who are embattled by increasingly sceptical public opinion?

Millions are now thinking about how they present themselves and their lives in images and videos using platforms like YouTube, Instagram and Snapchat. Meanwhile, millions more couldn't think of anything worse.

For some, social media has enhanced the importance of friends and family in providing news, information and advice, while for others it has liberated them from the narrow range of opinions they encounter in real life.





The fact that we can now choose more different ways to talk to one another is highlighting that many of us are opting for ways that mean we won't have to.

Of course, these differences may always have existed in societies and popular culture. But the fact that these choices are increasingly measurable makes these differences all the more stark.

The internet has meant we are no longer simply passive consumers of these forms of communication, but active participants in them. Access to cameras, publishing tools, social media, the internet, and smartphones, is showing just how different people are when it comes to communication.

**Put simply, we are increasingly defined not just by what we say but by how we say it.**

For anyone trying to communicate with the public – from marketing and PR agencies to brands to major corporates – this presents a clear problem.

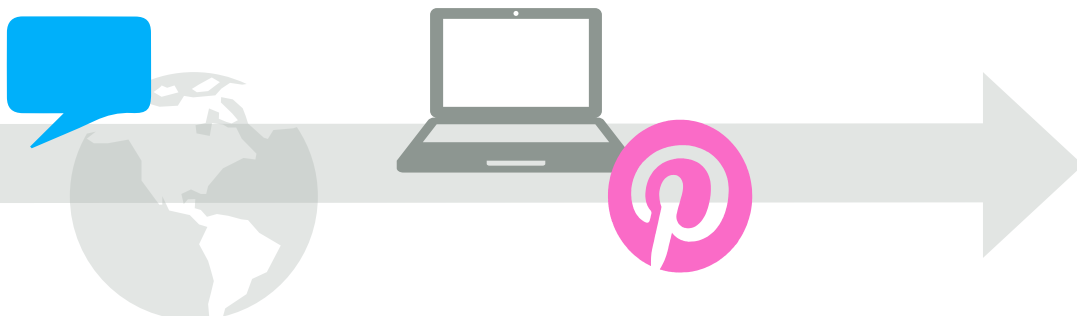
Firstly, it forces us to question longstanding assumptions about the way we view the world. Views we may have thought to be commonplace are perhaps not as widely held as we might have thought. Techniques that may have been considered universally effectively will have to be revised.

Secondly, it compels anyone trying to communicate with the public to move away from a one-size-fits-all solution. The benefits of tailoring information to one group could be utterly cancelled out if the same approach is applied to a different population.

Naturally, we couldn't hope to truly cover such a broad topic in its entirety. But we have designed a study that captures some of these key differences, delving in to the key factors that differentiate how different groups receive information and communicate.

We hope this will be interesting in its own right, but also provide genuine practical insights in developing new strategies that take account of the changing environment.

The fact that we can now choose more different ways to talk to one another is highlighting that many of us are opting for ways that mean we won't have to.



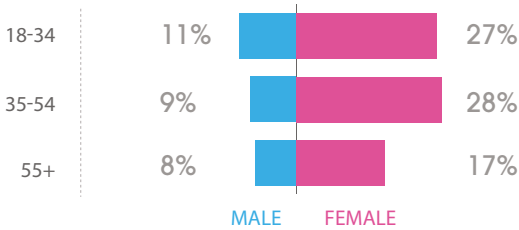
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# SNAPPY SOCIALISERS

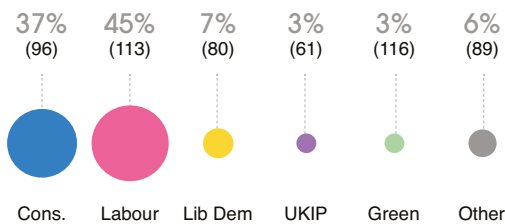


## WHO ARE THEY?

### AGE AND GENDER



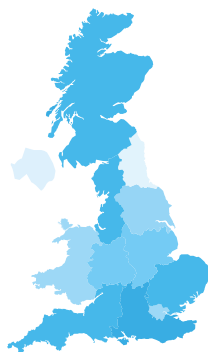
### VOTING INTENT



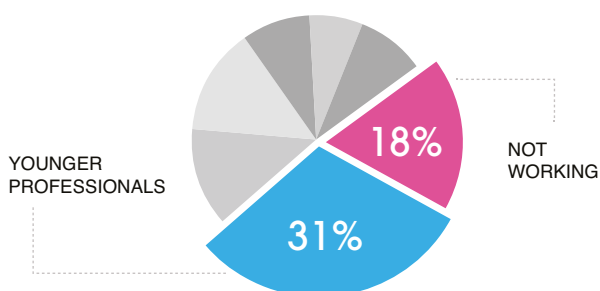
### CONSUMER BEHAVIOR



### REGIONS



### SOCIO-ECONOMIC



## HOW THEY COMMUNICATE

### LEVEL OF TRUST



Snappy Socialisers rely on the personal recommendation, being more likely to try products or services if they have been recommended by someone they know, and trusting their friends and family above all others.

### NUMBERS VS PICTURES

They prefer a picture to highlight an idea and find these easier to understand than large bulks of text. However they prefer the personal twist they can provide constantly taking pictures to provide memories and turning to stats when in need of validation.



### FAMILY AND RELATIONSHIPS



Snappy Socialisers put a lot of trust in those close to them, trusting these above all others and in constant communication, despite their busy on the go lifestyle.

### TECHNOLOGY AND MEDIA

Heavy internet users especially on smartphones

Heavy social media users across all platforms, especially Instagram and Snapchat



# 1. SNAPPY SOCIALISERS

Marketers have known for years the importance of word-of-mouth in influencing our attitudes and behaviours. It's also been clear that some people find this kind of communication more influential than others. However, the ever-increasing opportunities afforded by technology to interact with peers has made our personal connections all the more important.

Of course, face-to-face has always been the main way in which most people communicate. Telephones have been around for a century but it is easy to forget how limited this technology was for much of its existence.

The explosion of social media and messaging services means that we're more connected than ever before, whenever and wherever. Whether it's FaceTiming family on the other side of the world or chatting in sprawling WhatsApp groups that enable people to keep in touch with friends across the country, never before have we had quite so much contact with friends and family.

These services have not only changed how much we communicate, but how we communicate. Until just a decade ago, the closest most people came to expressing themselves visually on a day-to-day basis was through physical photo prints in photo albums. Now message threads are filled with a kaleidoscopic mix of emojis, videos, links and photos.

Our first segment – Snappy Socialisers – have embraced the opportunities afforded by new technology enthusiastically. For this female-dominated group, personal relationships are key, managing to always find time for their loved ones despite a busy lifestyle. Though they understand stats, a compelling story and personal touch are more likely to sway their decisions.

Snappy Socialisers live their life on-the-go, and moving around means the smartphone is king, or perhaps queen. They are among the heaviest users of smartphones and tablets, spending an average of over 2½ hours on their device on an average weekday, with 21% admitting to spend six or more hours.

This is borne out by one of their most distinctive statements: "I'm always in touch with my friends and family, no matter where I am" (85% compared to 59% on average). Smartphones keep them in constant contact when on the move, but it is also their means of snapping pictures or uploading the perfect social media post.

Messages are peppered with images and emojis. More than half (51%) say they're always taking pictures (compared to 32% of the general population), and 80% say they always come back from holiday with lots of photographs (49% generally).

**In terms of social media, Snappy Socialisers are active across a number of platforms, most likely those with a visual bent. Facebook, Instagram, Snapchat and Pinterest are all popular, and those with an account check their profiles several times a day, particularly on mobile.**

There are many similarities between Snappy Socialisers and Breezy Believers, but the key difference is the importance of the personal relationships in communication. Like Breezy Believers, they find pictures easier to understand than text (42% vs 32% generally), but instead of focussing purely on imagery when being sold a product or idea, they will turn to those close to them for advice and reviews. They are much more likely to try a product or service after it has been personally recommended to them, and they trust those they speak to on a regular basis, most notably friends and family above all others.

Their preference for the personal resonates in the industries in which they tend to be employed, working much more heavily in public-facing service industries such as retail and healthcare. This keeps them in touch with others and building new relationships along the way.

“

I use Facebook most of all, and I use to keep in contact with family and friends and also my hobbies...I've got several pages of art because I like drawing and crafty stuff...Pinterest I use all the time and I love it.

SNAPPY SOCIALISER FEMALE, 51, EAST OF ENGLAND



”





It has long been accepted within market research and academic research that women tend to prefer a more relationship-based communication style, talking through decisions and sharing experiences to come to a consensus decision. It is therefore perhaps unsurprising that 72% of Snappy Socialisers group are women. Nonetheless, there is still a significant minority of men.

**While they feel they have a good grasp of stats and are happy to be proved wrong with facts and figures, they view personal stories to be a just as important source of information as hard evidence.**

A compelling story is key to capturing the mind of this group. They prefer dramas and soap operas to news and non-fiction, and prize a good plot above all else. When stories are powerful enough, they can also have the effect of changing the minds of Snappy Socialisers, far more effectively than a strongly-evidenced factual argument. Sixty-three per cent say that it is just as important for a story to be engaging as it is for it to be true to the facts, compared to 54% nationally.

Given their title, it goes without saying that personal relationships are key for this group. Family and friends will always be the first point of call in need of advice or information. This is reflected when making large purchases, choosing to discuss with family and friends first before moving ahead with a big financial decision.

Recommendations are also key in consumer behaviour. Eighty-five per cent of Snappy Socialisers agree they “would be much more likely to try a product or service after it has been recommended by someone I know”.

We all know the importance of connections in maintaining wellbeing and that may be borne out by Snappy Socialisers. Two thirds (66%) say they are very satisfied with their life – the highest of any of the segments. In their financial status too, Snappy Socialisers generally feel comfortable with their lot, even if they are not among the highest earning segments in the study.



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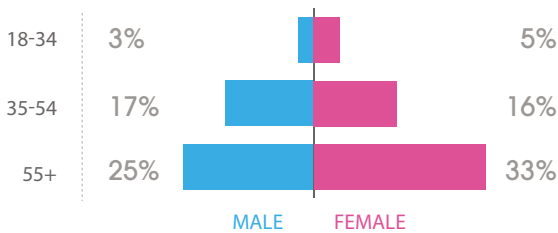
## TRUE-WORLD TRADITIONALISTS



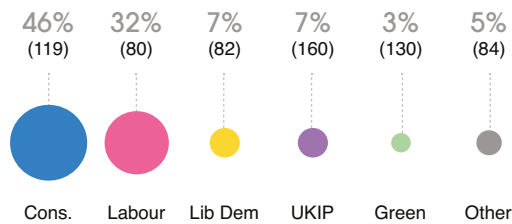


## WHO ARE THEY?

### AGE AND GENDER

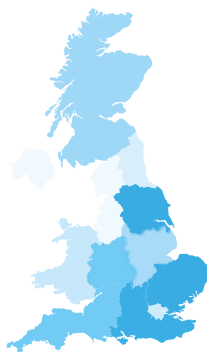


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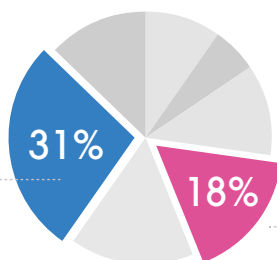
### CONSUMER BEHAVIOR

Average disposable income  
Shops at **£91.28**



### SOCIO-ECONOMIC

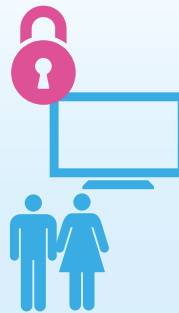
OLDER BLUE  
COLLAR  
WORKERS



RETIRED  
C2DES

## HOW THEY COMMUNICATE

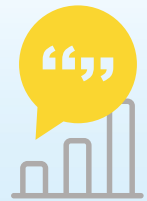
### LEVEL OF TRUST



True-World Traditionalists are most likely to trust what they hear from others, especially friends and family, with a lot of them choosing to watch the news on TV rather than digest it through magazines and newspapers. There is also a slight inclination for them to trust information more if they are receiving it face to face rather than by other means.

### NUMBERS VS PICTURES

Although they are not particularly visual people, the True-World Traditionalists favours pictures over numbers, often distrusting businesses that use too many statistics. They often feel like they don't have a good grasp on statistics and tend to switch off when they hear numbers on the news. Really, storytelling is where their interest is piqued.



### FAMILY AND RELATIONSHIPS



Family is important to them, often keeping in contact with and trusting them more than others, this runs with the theme of face to face contact, which runs throughout this group. The majority of their contact with their friends and family is on the phone or face to face, rather than over social media.

### TECHNOLOGY AND MEDIA

Don't use social networks Heavy television viewing



## 2. TRUE-WORLD TRADITIONALISTS

New technology may have changed the way many of us communicate but it is important to remember that there are many for whom this impact has been minimal and still more who feel suspicious or hostile.

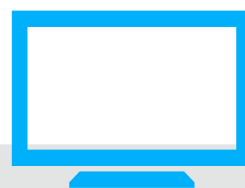
It is perhaps one of the difficulties posed by an increasing speed and variety of communication that there is an increasing gulf between the haves and the have nots. Those who embrace these technologies have the ability to communicate and consume media like never before.

However, on the other end of the spectrum, those left behind may find it increasingly difficult as fewer people want to engage on the terms they recognise and prefer.

There are numerous factors impacting this trend – education and age especially so. Yet, as Ofcom's UK Media Landscape has shown for the past two years running, the fastest growing group of internet users are over 65s who are logging on for the first time in incredible numbers. Whether this is a genuine embrace of new communications methods remains to be seen.

**Our second group, the True-World Traditionalists, could easily be seen as the left-behinds in the evolving communications landscape. They are generally older, with a heavy skew towards the 55+ age group. They are more likely to be of a lower social grade (61%) (either blue collar workers or retired), and have fewer formal qualifications.**

They are not particularly likely to use mobile or internet devices, specifically smartphones/tablets (42%/46%), laptops/netbooks or games consoles (90%). They are also not particularly prone to reading magazines or newspapers, preferring to digest information and news through TV. When it comes to social networks, they are the least likely to use them, although Facebook is the most popular amongst those who do.





This nostalgia for the past and uncertainty of how technology is changing how we communicate is the main thing that defines this group. When asked how strongly they agree or disagree with the statement “I feel nostalgic for the way things used to be”, they were the highest agreeing by far.

This group like human interaction, whether this is someone’s voice, face-to-face interaction or just seeing human faces on TV. Preferring to watch rather than read where possible, they also feel like technology will never replace the experience of speaking to actual people. Their love of human interaction has a key link to trust, and they are the most likely to trust the people they talk to on a regular basis.

This group are most likely to prefer to speak to an actual person when dealing with brands or companies (79%) and see or experience a product before actually buying it.

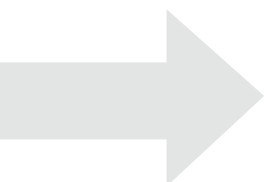
This love of human interaction translates into their love of a good story, often stating that they would rather read a story that has a good plotline rather than one that is necessarily 100% truthful. More than three-quarters (77%) agreeing that in film/TV and books, a good plot is more important than anything else.

Numbers in general are something that True-World Traditionalists shy away from. They are one of the tribes least likely to trust official sources of information or statistics (35%) and one of the most likely to switch off when they hear numbers on the news (36%).



I only use one social media account and that’s Facebook. Probably a bit far behind the times now but I don’t see the point. Instagram, Snapchat, LinkedIn...not my bag entirely.

TRUE-WORLD TRADITIONALIST  
MALE, 32, SOUTH WEST



They feel sceptical towards numbers, with a quarter (27%) agreeing that you can make statistics say anything you want. For this group, feelings and stories are more important than facts and figures, with half (53%) agreeing that it is more important to understand what someone feels rather than what they think.

Although this group might not be particularly technology literate, a large proportion like to keep in contact with friends and family, with 44% saying that they are always in touch with them no matter where they are. They often also turn to friends and family as the first port of call for information or advice.

Unsurprisingly, a lot of their contact is via phone call or text message rather than visuals.

For True World Traditionalists, communication is about seeing, hearing, and feeling. Technology may offer new ways to keep in touch and they are not averse to using it in moderate amounts when it suits them. But it can never replace the tried and tested forms of communication that have served them well.

“

The only one I actually use is Facebook...I'm particular about who I'm friends with. I guess I'm slightly worried about being hacked...I don't know what some of the apps are, maybe because I'm older. It's just social media isn't as important to me as it is to younger people.

TRUE-WORLD TRADITIONALIST  
FEMALE, 53, EAST MIDLANDS

”





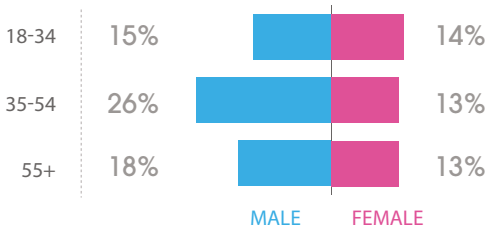
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# CONFIDENT CALCULATORS

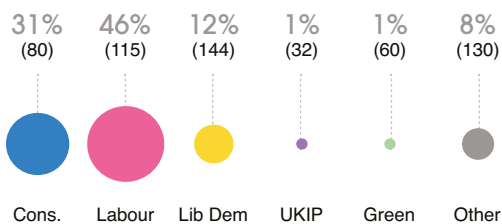


## WHO ARE THEY?

### AGE AND GENDER

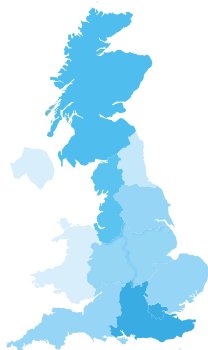


### VOTING INTENT



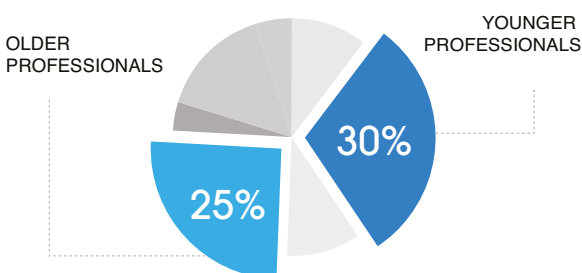
### CONSUMER BEHAVIOR

Average disposable income  
Shops at **£135.14**



### REGIONS

### SOCIO-ECONOMIC



## HOW THEY COMMUNICATE

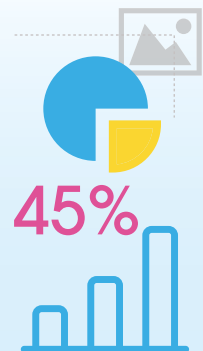
### LEVEL OF TRUST



Confident Calculators have a high degree of social trust, but most especially in experts and numbers. In a complex and changing world, they feel that those who have put in the time and training to understand issues are the ones who should be respected. Nonetheless, they also think the average person on the street can be trusted not to lie.

### NUMBERS VS PICTURES

Figures are where the Confident Calculators truly stand out. Numbers mean accuracy and statistics mean an accurate way of understanding the world – just 1% say they switch off when they hear numbers on the news. They tend not to be swayed by pictures. Instead, concepts and ideas are the things that truly stick with them.



### FAMILY AND RELATIONSHIPS

Friends and family clearly have an important influence on Confident Calculators, but not nearly as much as other groups. They sit squarely in the middle, taking the advice of loved ones when they need it, but refusing to rely on any single source of information or be overly swayed on the basis of personal relationships.

### TECHNOLOGY AND MEDIA

Use Twitter and LinkedIn



High consumers of online news – BBC News, HuffPo, Guardian



Tend to prefer to read rather than watch news





### 3. CONFIDENT CALCULATORS

The proliferation of data in the past decade has thrown public attitudes to numbers into sharp relief. Behaviour, attitudes, and beliefs are more trackable, measurable and quantifiable than ever before. Yet, there appears to be a sharp disjuncture between those who place their faith in numbers to tell them the way the world truly is, and those who feel that statistics are at best misleading and at worst chronically biased.

As William Davies wrote in The Guardian earlier this year, ‘in theory statistics should help settle arguments...[but] rather than diffusing controversy and polarisation, it seems as if statistics are actually stoking them.’ It is a moot point whether this is in spite of increasing amounts of data in the world or because of it.

Certainly, explaining arguments, ideas, and experiences in numerical terms can be seen as a choice of communication. Moreover, the framing of these terms can also have a significant impact – is it more effective to say £65.5m across the country, or £1 for every man, woman, and child?

Our segmentation found one group who are highly receptive to the use of numbers and statistics in communication – the Confident Calculators. This group feel that statistics are the most important, if not the only, way to accurately understand the world – more than three-quarters (77%) agree with this statement compared to 43% across the rest of the population.

One of the key factors in determining receptiveness to numbers is levels of confidence. Negative experiences with maths at school can deter people from engaging with numbers for life.

**By contrast, four in five (82%) Confident Calculators think they have a good understanding of statistics, compared to 58% on average.**

This is perhaps unsurprising given the group generally have higher levels of education – they are 50% more likely to have an undergraduate degree (34%) and nearly three times as likely to have a postgraduate qualification.

As would be expected, this also correlates into higher socio-economic status, with 77% of Confident Calculators living in ABC1 households, and more than a quarter (27%) having a household income of above £50,000 a year.

Education appears to be a far more important factor than age among Confident Calculators. Unlike other segments, they are spread fairly evenly across generations, with 29% aged 18-34, 39% aged 35-54, and 32% aged over 55.

Receptiveness to data and numbers extends across different media and personal communication channels. Confident Calculators are also two-thirds (-67%) less likely to believe businesses use too many numbers when communicating with them.

Just 1% say they tend to switch off when they hear numbers on the news and this is reflected in their choice of media. They are significantly more likely to consume written media, and especially quality publications, both in print and online.

**While the proportion who tend to use numbers to support their arguments is lower (44%), it is still nearly twice as high as the rest of the population.**

This group are as receptive to numerical communication as they are unmoved by more qualitative forms of communication. Just 6% prefer soaps and dramas to news and documentaries, while a similarly small proportion (5%) say that something isn't real unless they can point to a personal example.

Images are equally unpersuasive for Confident Calculators. They are less than half as likely as the rest of the population to say they find images easier to understand than text (-56%) or to prefer TV news to written news (-51%). This is also reflected in their choice of media. They generally watch less TV than the rest of the population and social media usage is also skewed towards less image-heavy platforms, such as Twitter and LinkedIn.



I'm a facts and figures person rather than a touchy-feely one - I strongly prefer a logical argument to an emotional one.. I'd therefore use as much actual data and calculations (with references to where it came from) as possible.

CONFIDENT CALCULATOR MALE, 41,  
YORKSHIRE AND HUMBERSIDE





The vast majority (92%) of the group often find themselves interested in the source of information they've heard or read, and the same proportion are confident they would know where to go to find out more about a news story. Ninety-four per cent say the internet has allowed them to quickly and easily check information, and they are among the heaviest online browsers, especially on laptop and desktop computers.

**Given the focus on various official and unofficial statistics during the EU Referendum, it is perhaps unsurprising that Confident Calculators voted heavily in favour of remain (69% to 31%). They tend to lean to the centre-left and liberal wing of politics, with 46% voting Labour in the 2017 general election, and 12% voting Liberal Democrat (44% higher than the national average).**

However, their confidence also translates into a relatively high degree of social trust, both towards institutions and other members of the public. They are 37% less likely than the general population to believe people can't be trusted to tell the truth, and 36% more likely to say that experienced researchers can be trusted to tell the truth. Ultimately, they express a desire to be even-handed and open-minded with evidence, regardless of whether it comes from friends and family or a stranger.

Perhaps the key to understanding Confident Calculators is their high propensity to agree with the statement 'things are often more complicated than they seem at first glance'. Eighty-nine per cent agree with this sentiment, compared to a national average of 75%.

Confident Calculators believe that numbers are the best way to organise and understand a complicated modern world. Their high level of education means they don't feel intimidated by numbers, whether they are produced or disseminated by governments, brands, or other people. Instead, statistics show an objective reality that allow everyone a common reference point in communication.





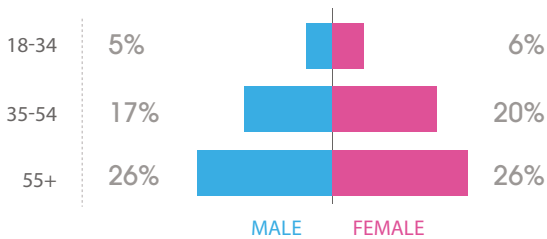
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## SELF-RELIANT SCEPTICS

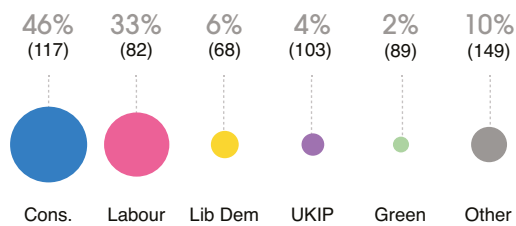


## WHO ARE THEY?

### AGE AND GENDER

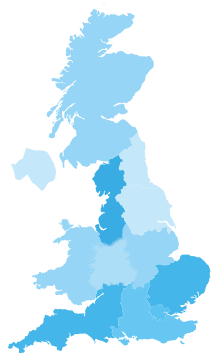


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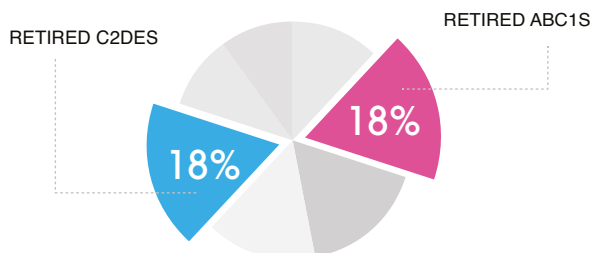


### CONSUMER BEHAVIOR

Average disposable income  
Shops at **£114.86**



### SOCIO-ECONOMIC



## HOW THEY COMMUNICATE

### LEVEL OF TRUST

Self-Reliant Sceptics tend not to trust headlines and news at face value. Instead of being in a rush to come to conclusions from the endless 24-hour news cycle, they usually take their time to go and find out information for themselves. Being in control of the process enables them to evaluate evidence, rather than rely on particular people or sources to simply update them.



### NUMBERS VS PICTURES

Numbers are a big turn off for Self-Reliant Sceptics: a simple figure does little to convince them of an argument's validity, mainly because you can make statistics say anything you want. Although photos aren't off-putting for sceptics in the same way, they are still not convincing – sceptics prefer to be the ones taking the photos rather than the ones looking at them.

### FAMILY AND RELATIONSHIPS

Nothing is ever accepted at face value or second hand. This partially why face-to-face conversations and proper verbal communication can never be replaced by technology.

Although what friends and family say might not be taken as gospel, having the chance to find out information in person and decide for themselves if it is to be trusted or not is important to this group.



### TECHNOLOGY AND MEDIA

Lower internet and social media use

Likely to read the Express or Mail



## 4. SELF-RELIANT SCEPTICS

New ways of communicating and discovering information can certainly be exciting for some. But with so much information swirling around, it is unsurprising to discover that this can also breed or strengthen scepticism.

Social attitude surveys have long found a significant proportion of people to be untrusting of strangers, institutions and others. However, it seems logical that exposure to a plethora of new sources of information of dubious quality might heighten this scepticism. Certainly, the rise of ‘fake news’ should make us all at least somewhat wary of taking anything and everything we read online at face value.

However, the internet is also a powerful tool to at least take a more proactive approach. If relying on number one is the most sure-fire way to a sound decision, online communication allows individuals to research for themselves and make up their own minds.

The Self-Reliant Sceptics are the fourth segment we discovered. Unlike some of our more technologically-engaged segments they are far less trusting of the outside world and most communication channels, but it’s important not to write them off as disenchanting or disengaged.

It is certainly correct that they are less engaged with newer forms of media. They are slightly less likely to use social media than the population as a whole, with 26% saying that they do not use social media (vs. 19% generally). Additionally, their use of connected devices is below average, but they are by no means cut-off.



I use Facebook now and again, mainly to like companies. I don't really use any other social media otherwise unless I'm looking for some information I don't connect with people.

SELF-RELIANT SCEPTIC FEMALE,  
49, EAST OF ENGLAND



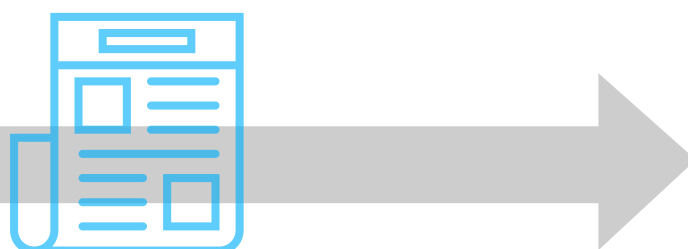
The key demographic factor that characterises the Self-Reliant Sceptics is that they are not digital natives, with the vast majority older than their later 30s. For them, technology has its place, rather than being a ubiquitous natural presence.

Setting them apart, however, is what media they consume and how they respond to it. They are less likely to be over hungry consumers of digital news and information, but this is because they are more selective with the channels that they tune into. If they access news online, they access only one or two sites rather than four or five, and if they are on social media, they will tend to only use one platform. In short, they may occasionally post photos on Facebook, but they won't do so on Twitter and Instagram as well.

**This measured way of consuming content is quite often due to their attitude to the outside world. For Self-Reliant Sceptics, things are often much more complicated than they seem at first glance (82% agree), and expecting them to make their mind up quickly just by glancing at a headline is not going to work.**

This group have a far greater sense of their own abilities to understand the news and find out for themselves, but the crucial element is that they need to be in control of the process. Rather than be led by a headline, they like to find things out for themselves, explore the sources behind the headlines (76%), and delve into a story at their own pace. They might not be doing a literary review every time they pick up a newspaper, but they are thinking for themselves and are very discerning about what they will and will not believe.

Their scepticism can come across as obstructive in some cases. A general lack of trust in others to provide them with fair and accurate information (53% vs. 39% generally), combined with a focus on their own ability to read between the lines, means this is a group hostile to numbers.





Generally speaking, numbers don't reflect how Self-Reliant Sceptics views the world (69%). They prefer to explore and discover rather simply find a one-stop answer to all their queries. More pointedly, they think statistics can be easily manipulated and misrepresented, with 90% thinking that you can make statistics say whatever you want (vs. 69% generally) and they're determined not to be wrong-footed by this. Finally, they think numbers and statistics are no replacement for good judgement and common sense.

**While some other tribes respect authoritative research reports and official sources of information, this group does not. The suspicion that they are being strong-armed into an opinion or position is enough for them to actively distrust the motives of experts.**

The difficulty with communicating with this tribe is that it is far easier to find the ways they don't like to communicate than the ways that they do. The clearest strand throughout their answers is that they need the personal touch. And this doesn't mean Google algorithm or keeping personal information on file to wheel out at a later date. What this tribe wants is personal contact – to be communicated with frankly and in person, with 80% preferring to speak to an actual person when dealing with brands or companies (vs. 68% generally).

Unfortunately for businesses, the only way to stand a good shot of reaching this group is to put resources into this personal touch. As a client, they want a meeting rather than an email – preferably on their own turf. As a customer, they want their bank to have a branch, they want staff easily available in their supermarkets, and the last thing they want to do is use automated machines in store to make an order.

The preference for being in control means that it's hard to find an easy way to market to Self-Reliant Sceptics. They are less likely than the average person to be led by personal recommendation (61% vs. 70% of the total population), but this should not be discounted when thinking of ways to reach these Self-Reliant Sceptics. The fact that they trust their friends and family as much as anyone else suggests that they are prepared to cut a bit of slack for the people they come into contact on a regular basis.

For Self-Reliant Sceptics, communication and understanding needs to be done on their own terms. They've seen enough of the world to understand that evaluating any new information requires pragmatic caution, regardless of the source.



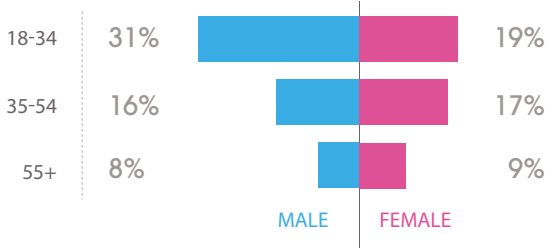
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## BREEZY BELIEVERS

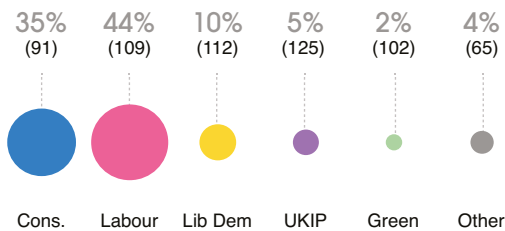


## WHO ARE THEY?

### AGE AND GENDER



### VOTING INTENT

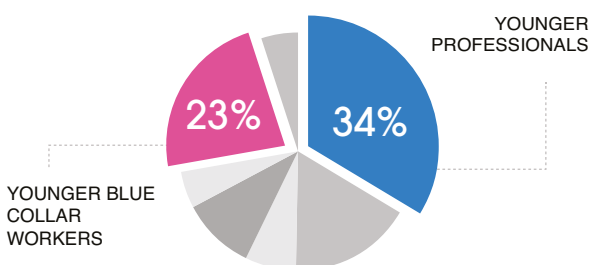


### CONSUMER BEHAVIOR



### REGIONS

### SOCIO-ECONOMIC



## HOW THEY COMMUNICATE

### LEVEL OF TRUST

These individuals will commonly believe what they read, often quickly forming opinions based on headlines they come across and only turning to one or two sources to gather their information about the news.

However, despite this, Breezy Believers will often look to personal examples to solidify what they read, suggesting they may not always take information at such face value.



### NUMBERS VS PICTURES

With a greater understanding of pictures compared to text, they are more likely to be emotionally affected by a picture than a story, often remembering them better than concepts or ideas. Their form of communication often takes a creative route, commonly using lots of pictures and emojis when messaging family and friends.

### FAMILY AND RELATIONSHIPS

Their strong connection with family and friends often leads them to believe what they've heard from them rather than from elsewhere, perhaps dismissing the quickly formed opinions of headlines they've read online. They are also more interested and pay more attention to news if it's been shared by their friends and family on social media.

### TECHNOLOGY AND MEDIA

Heavy smartphone users

Likely to read tabloids – Mail Online, Mirror, Sun, Star

Heavy TV watchers

Heavy users of most social networks, especially Instagram and YouTube



## 5. BREEZY BELIEVERS

Marketing has always played on emotions in various ways and to different degrees, but the rise of ‘clickbait’ – content designed to drive traffic and engagement – has created a tendency towards an online environment dominated by the salacious and the emotive.

Many of the stories, videos, and images we see online are perfectly crafted to elicit strong feelings, imploring us to make a quick judgement about who or what is right or wrong. Our friends and family amplify these feelings, asking us to share content, donate money and sign petitions.

Social media has also heightened the ability of images to influence our opinions. The image of Alan Kurdi, the Syrian toddler found dead on a Turkish beach, was beamed around the world in a matter of hours, generating an outpouring of pity and bewilderment.

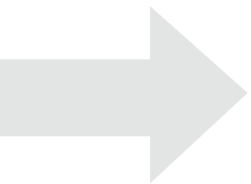
Yet, this pace of distribution also creates the potential for images to be doctored or taken out of context, thereby misdirecting our emotions. As Jonathan Swift wrote, ‘falsehood flies, and the truth comes limping after.’

**Members of our final segment are quick to make up their minds when they are presented with affecting images or stories. Breezy Believers tend to rapidly form opinions based on what they read online (47% compared to 23% nationally).**

For this group, a first glance is often enough to fully understand a situation. Perhaps as a result, they are also the least likely group to say they like to hear a range of opinions before making up their minds. They tend not to be interested in the source of information they’ve heard or read and wouldn’t feel especially confident in knowing where to go if they did want to find out more. This is also shown as they are the least likely segment to delve deeper and find out information for themselves rather than simply taking someone’s word for it (67% vs 80% nationally) and often won’t turn to the internet to easily check information they have been given.

Most commonly from the London region (24%), Breezy Believers tend to be young professionals (34%) or blue collar workers (23%) aged between 18 and 34. Notably, they are much more ethnically diverse than the other groups we found, with nearly a quarter (23%) coming from a non-white British background, compared to 13% across the rest of the population.





They tend to prefer news stories that have plenty of pictures (51% compared to 30%), and more than half (52%) say they find pictures easier to understand than text. This is reflected in their choice of news websites – Mail Online, Mirror, and BuzzFeed all rank highly – and newspapers – Daily Mirror, The Sun and the Daily Star.

They are heavy internet users, especially on mobile devices, with more than half (53%) saying they spend 2 or more hours browsing on a smartphone or tablet on an average weekday. And they are on social media a lot, being active users of Instagram, Snapchat, and especially, YouTube. It is no surprise, therefore, that they are the most likely segment to turn to blogs or reviews on social media for financial information.

**Technology seems to play an important role in their life and will continue to take increasing role in the future for this segment.**

They are the least likely to prefer speaking to a real person when dealing with brands and companies (58% vs 68% nationally) and also the least likely to believe that new technology can never replace meeting someone in person.

However, despite this tendency towards the impersonal, they are also the segment that most agrees that it's important to understand what someone feels more than what someone thinks, suggesting they do like to get below the surface, perhaps when it comes to people they care about. They also enjoy telling stories and anecdotes to entertain their family and friends.

For Breezy Believers, a personal example is what really brings something to life (48% agree, compared to 25% on average). It is no surprise that they prefer non-fiction over fiction and often choose to watch soaps or dramas, rather than the news or documentaries. Yet like many of their generation they are increasingly turning away from live television in favour of streaming services.

“

The social media sites I use are Facebook, Instagram, Twitter, Snapchat and Pinterest...I follow celebrities, brands. I post photos and videos on twitter and Instagram, sometimes on Facebook.

”

BREEZY BELIEVER MALE, 31,  
EAST OF ENGLAND



Breezy Believers share a number of characteristics with Snappy Socialisers, although they place much less importance on maintaining connections with friends and family at all times. A significantly lower proportion would immediately turn to friends and family for information or advice – 55% compared to 73% among Snappy Socialisers.

**Statistics don't appeal, with nearly half (48%) saying they tend to switch off when they hear numbers on the news, and 58% saying numbers and charts don't reflect the way they see the world.**

Perhaps as a result, they are less politically engaged than other groups, with higher proportions admitting that they did not vote in the EU Referendum (17%, vs 10% among all groups) and the 2017 general election (20%, vs 12%).

Despite these views, they aren't necessarily distrustful of official sources of information and statistics, but these need to be presented in the right way in order to grab their attention.

Thinking of themselves as visual people, they tend to remember images better than concepts or ideas which is also reflected in their methods of communication, preferring to use messages to friends and family that contain plenty of pictures or emojis.

Their easy-going nature translates into a sunny disposition. They are nearly twice as likely as the general population to say the current financial state of their household is very comfortable and 34% think this will get a little or a lot better in the next twelve months, compared to 23% overall.

Their personal views can easily be changed, depending on how and when they receive 'trusted' information from different sources. Whether it is from experienced researchers or headlines they've read online, this segment seems to change their opinion depending on the most recent information that is presented to them. However, their family and friends will usually take priority.



# METHODOLOGY

We started this research with the aim of determining how the UK and NI population communicate with others, whether media, civil institutions, or friends and family.

Our ultimate goal was to produce research that not only provided an accurate picture of the way we communicate, but also generate new insights that could inform the work and strategies of our clients.

Taking input from communication professionals and our own previous research, we developed five broad themes, each relating to different aspects of communication, which were then used to structure the substantive elements of the research:

- **VISUAL COMMUNICATION** – the use and perception of images and imagery in communication, both in terms of personal communication to others, and reception of images from popular media
- **SCEPTICISM** – the extent of trust in various sources of communication and information, from experts to other members of the public
- **PERSONAL CONNECTIONS** – the importance attached to communication with personal connections, such as friends and family
- **STORYTELLING** – the use and perception of narratives in communication, especially the importance placed upon narrative above other aspects, such as factual accuracy
- **NUMBERS AND STATISTICS** – the understanding and reception of statistics, especially when used in the media and public discourse

For such a complex topic, this is of course not an exhaustive list, but it does cover many of the most important aspects of how people communicate, while also capturing some of the most salient aspects of how communication is changing.

Ten to twelve attitudinal statements were developed under each of these headings. In particular, many of the statements focused on the extent to which media and technology impact the nature of communication, and vice versa.

These attitudinal statements were then scripted alongside a significant number of demographic and profiling questions, from political affiliation to media consumption to employment status.

The survey was completed by 2,017 UK adults from Opinium's panel. To ensure the generalisability of the conclusions, the sample was weighted to nationally representative criteria – age and gender (interlocking), region, and socio-economic grouping (SEG).





We chose to use the segmentation approach with the aim to discover the communication patterns within the population. Cluster analysis was applied to the data to group together respondents with similar communication styles and accentuate the differences between these groups. We continued to iterate the analysis until we were confident that the cluster solutions was stable from the statistical perspective.

As an iterative and semi-guided method, segmentation entails some human input. Specifically, we wanted to ensure that the number of segments was not so small as to be devoid of insight, and not so large as to be unwieldy. Our assessment of the validity of the solutions was also informed by a ‘smell-test’: whether members of a tribe seemed truly alike based on our professional experience as researchers.

**The analysis eventually resulted in 5 distinct tribes. The answers of respondents within these segments to the demographic and profiling questions were then used to build up a more complete understanding of the individuals within them.**

We have subsequently applied the segmentation to over 5,500 members of our panel, allowing us to return to members of these groups for further analysis.

As our research shows, communicating effectively is crucial, and audience segmentations are no different! We were therefore keen to bring these tribes to life using, putting real faces onto the people behind the numbers.

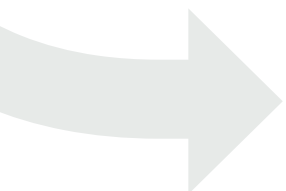
We invited 18 respondents from each of the groups – around 4 for each tribe – to join us for the Pop-Up Community. Pop-Up Communities enable us to bring together members of an audience or population for a short period of time using a dynamic online platform.

While we have endeavoured to give a fair representation of each of the tribes in this report, it is important to bear in mind that there are no hard and fast rules. Tribes are defined by tendencies and trends relative to the rest of the population and there will always be exceptions, some of which may be significant.

We intend to carry the research forward in a number of ways. Firstly, we plan to study each of the groups in more depth, with the aim of gaining a better understanding of their communication patterns and styles.

Secondly, we know that analysis based on attitudinal statements can only go so far in helping us understand a subject as complex as communication. We therefore aim to use behavioural split-testing approaches to assess the extent to which self-reported attitudes and behaviours translate into real-world attitudes and behaviours.

Finally, we see the insights generated by the research as fundamentally actionable. Regardless of sector or service, we aim to help clients use these insights to produce communication that truly resonates with their audiences.









## About Opinium

OPINIUM is an award winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on pulse of what people think, feel and do. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

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What people  
think, feel and do.