



COMMUNICATIONS
CONSUMER
PANEL

No one should miss out: consumers say what they want from the digital future

RESEARCH REPORT | FEBRUARY 2009



The Communications Consumer Panel was established under the Communications Act 2003 as an independent advisory body. Its role is to influence Ofcom, Government, the EU, and service and equipment providers so that the communications interests of consumers and citizens are protected and promoted.

The Consumer Panel is made up of part-time members with a balance of expertise in consumer issues in the communications sector. There are members representing the interests of consumers in Scotland, Wales, Northern Ireland and England.

Consumer Panel Members are appointed by Ofcom, subject to approval by the relevant Secretaries of State. They are appointed in accordance with Nolan principles and are eligible for re-appointment. The Consumer Panel is assisted by a small advisory team.

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Section 1

Foreword

Policy makers and regulators in the UK are currently debating the future of communications policy in the context of Digital Britain. This Government initiative is intended to ensure that as a society we are equipped to benefit fully from the digital services and content that now play such an important part in our lives. At every seminar and conference where the policy challenges are being debated, the Communications Consumer Panel hears participants say that the future shape of the communications sector will depend, in large part, on what consumers and citizens want. But no-one can agree on what that might be. So to move the debate forward and help us develop some evidence-based recommendations to Government, we commissioned this research.

We wanted to work with people to imagine what the future might hold for us all and to consider the role of digital communications. Asking people to imagine a potentially very different future is always difficult, but not impossible. To help us, we chose a deliberative research approach – inviting consumers and citizens to join us for a day at a time to debate with each other. Starting with their own lives, they thought through the place of communications and the hopes and fears they have for the way their lives will develop, and how communications services might contribute.

When the Communications Consumer Panel was established convergence of communications networks and services was foreseen but not yet happening. It is now occurring apace and is already bringing huge benefits to consumers and citizens. For example, today it is possible to use a mobile phone to access the internet and find a map to your destination, to watch TV programmes you have missed using i-player on a computer or a digital television box, to share photos and videos with friends and family across the globe in a moment, and to join in debates on topical issues in networking sites on the internet.

These benefits, and many more, were well recognised in the research, with the participants expecting even more in the future. But people have some clear requirements:

- They ask that future developments should be focused on their needs and wants, not the technological possibilities. Technology should be a means to an end.
- They ask companies to respect the pressure on their time and the complexity of the decisions that they have to make; they want services and equipment that are easy to use, efficient and reliable; and they want streamlined information that is concise, up-to-date and relevant.
- They also seek commitments from government and industry about privacy and security; they recognise the benefits that could come from data-sharing, but want to know that their personal information will be treated with care.
- In the final analysis, they believe that converged communications are now so central to our lives that no-one should miss out; they ask that the potential advantages should be available to all.

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The Communications Consumer Panel, like consumers and citizens, sees a great future for digital communications, but only if the interests of consumers and citizens are placed at the centre of the current debates. We will be using this research to influence the development of Government policy and following it up with further work to understand more about what leads consumers and citizens to think that communications services are now so essential.

A handwritten signature in black ink, appearing to read 'Anna Bradley'. The signature is fluid and cursive, with a long, sweeping underline that extends to the right.

Anna Bradley

Chair, Communications Consumer Panel

Section 2

Executive summary

2.1 Introduction

The Communications Consumer Panel was established under the Communications Act 2003 as an independent advisory body, with the role of advising Ofcom and others on consumers' interests in telecommunications, spectrum and, with the exception of content issues in broadcasting.

The Communications Consumer Panel commissioned Opinion Leader to conduct deliberative research to better understand the needs of consumers and what will be required to meet these in the future. The value of a deliberative approach was that it encouraged participants to make collective decisions about future priorities and to recognise the tradeoffs involved.

Four day-long 20-person deliberative workshops were conducted in October and November 2008 with participants in London, Caernarfon, York and Glasgow. This followed a 16-person pilot event in London. The composition of the workshops was broadly representative of the UK in terms of socio-demographics and technology usage and ownership.

2.2 Main findings

Participants began by identifying their life and consumer needs

What will matter to people fundamentally is unlikely to change. 'Life needs' include personal fulfilment, social interaction, quality of life, and work satisfaction. People meet life needs in part by buying and using products and services. In doing so, they have certain 'consumer needs', which include quality, choice, ease of use, access and affordability. Consumer needs can therefore be seen as enabling people to meet some of their life needs.

Participants place a high value on communications services and devices. These help meet people's needs by increasing access to information, providing new ways of keeping in touch, increasing convenience and flexibility, and providing new ways of being entertained. However, technology is a means to an end and participants said that should this hierarchy be reversed they would have a number of concerns.

They then considered what will be required to meet their needs in future

What is likely to be important to people in the future will be based on the constants discussed in the previous section. However, people's expectations and how they judge whether their needs are being met are likely to evolve over time, in response to new opportunities and challenges.

A number of critical issues are anticipated to have an increasing impact on how people's core needs and priorities will be met in the future. These issues include macro social and economic trends, and developments in the consumer and technological world, and they are summarised in Figure 1.

Figure 1: Factors expected to influence life and consumer needs in the future

<p>To meet consumer needs...</p> <ul style="list-style-type: none"> • In response to time poverty – processes need to be easy to use, efficient and reliable • In response to information overload – information needs to be concise, up-to-date and relevant • In response to proliferation of choice – need help to filter options and make right choices • In response to new possibilities – increased expectations of customisation/personalisation • In response to more services moving online – services need to be accessible, affordable and easy to use, and offline services need to be preserved for those who need them 	<p>To meet life needs ...</p> <ul style="list-style-type: none"> • In response to both offline and online safety/security issues – need protection of personal data and education about risks • In response to health trends and lifestyle challenges – need information and support to stay well and independent • In response to the effects of climate change – need consumer devices to be energy efficient • In response to social/economic trends and government policy – need information and support to help themselves • In response to changing social and work patterns – need the flexibility that communications services provide
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A central theme across all age groups was a desire to keep technology in its place and maintain a balance between technology and ‘real life’. In addition, some degree of personal interaction needs to be protected.

2.3 Implications for government, regulators and industry

Government, regulators, service providers and individuals were all seen as having a role to play in managing the effects of developments in communications technology.

In order to manage the impact of developments in communications, participants in the research identified four priorities. These were security and privacy, information and support, reliability and back-up, and equality of access.

In relation to equality of access, it was felt that technology could potentially help vulnerable and disadvantaged groups provided that they were able to access and make use of it. Participants felt that it was important that the digital divide does not increase. Some participants saw basic access to the internet as a ‘right’ in the same way as access to utilities is. While they expected those who could afford it to pay for internet provision, they wanted government to ensure that access is possible and affordable for all. There were specific suggestions to expand infrastructure and to provide free equipment or subsidies where required.

The findings of this research are being used to help determine what future policy and regulation will be required in the communications sector. The Consumer Panel’s current thinking about the implications of this research is summarised in the Foreword to this report.

Section 3

Background

3.1 Research objectives

As the pace of technological change in communications continues to increase, predicting the future effects on the general public, and what policies and regulation will be required, is becoming more challenging than ever before. In this context, the Communications Consumer Panel commissioned research to better understand the needs of consumers and what will be required to meet them in the future.

The overall aim of the research was to provide the basis for identifying policy and regulatory challenges in enabling consumers to receive the communications services that they will require over the next 5-10 years. It was seen as important for the research to be focused on participants' potential future needs and aspirations, and to move beyond their current experience of technology.

The specific research objectives were to:

- Explore participants' aspirations for their medium-term future lives (next 5-10 years);
- Understand participants' experiences of and attitudes to technology, and the role it currently plays in their lives; and
- Explore the opportunities that communications services and devices may provide for people, as both citizens and consumers, in the future.

3.2 Methodology and sample

Opinion Leader conducted deliberative research with the general public to explore these areas of interest. Participants were asked to envisage what the future would be like and what their needs and aspirations might be in this future. Given the complexity of the subject matter, a deliberative approach was chosen. This provides participants with more time to consider issues in detail and arrive at considered points of view. Typically, deliberative research also involves more participants than standard focus groups and this enables people to be brought together from a wider range of backgrounds (for example, younger and older) to share their experiences and take account of different points of view. Thus, the value of a deliberative approach for this project was that it encouraged participants to make collective decisions about future priorities and to recognise the trade-offs involved.

While there are numerous benefits of a deliberative approach, as detailed above, readers of this research report should also be aware that because the aim of many discussions was to produce a consensus view on an issue, there is less emphasis on individuals' personal points of views. In addition, the nature of deliberative research means that the findings of this report could not be replicated in a quantitative study as participants were taken through a journey and given information to equip them to engage with this topic in a meaningful way.

More specifically, the research comprised four day-long deliberative workshops that were conducted with the general public in October and November 2008, each comprising 20 participants. These were held in the following locations:

- London;

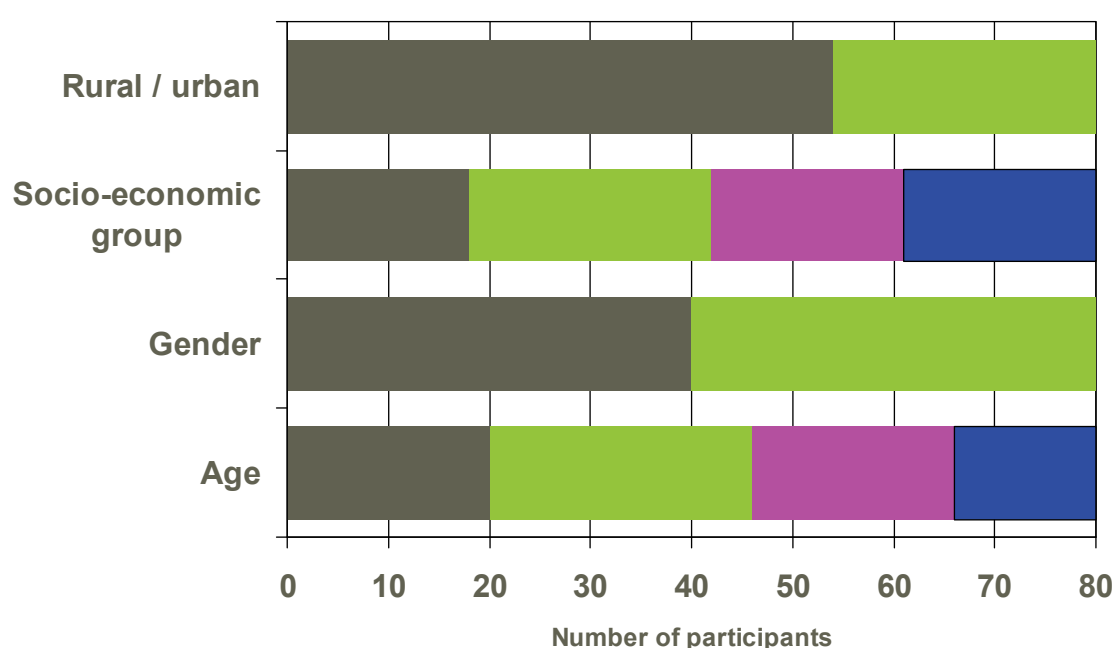
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- Caernarfon;
- York; and
- Glasgow.

In advance of these sessions, a pilot workshop with 16 participants was held in London in October 2008 to road test the agenda and materials.

The workshops included a cross-section of the UK population in terms of location and demographics. The sample break-down across the four groups is shown in Figure 2.

Figure 2: Breakdown of the groups that participated in the research



In addition, participants were recruited to be broadly representative of the general public in terms of their technology usage and ownership. The following factors were taken into consideration when designing the sample frame:

- Mobile phone ownership (none, 2G, 3G);
- Internet status (no internet, dial up, broadband); and
- TV platform (analogue only, Freeview only, cable/satellite).

There were also minimum quotas of the following new media usage to ensure representation of consumers accessing a range of new devices and services:

- Accesses Internet via mobile phone
- Uses BBC iPlayer / 4onDemand
- Uses personal video recorder (PVR)

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The workshops followed the following running order, with the discussion in each session building on the last:

1. Discussion of current needs and priorities
2. Discussion on what helps people meet their current needs/priorities
3. Group feedback on current needs/priorities and main developments that have helped
4. Quiz and presentation on societal/consumer/technological trends to help participants imagine what the future might be like
5. “Planet future” exercise to enable participants to anticipate their potential future needs/priorities
6. Group feedback on future needs/priorities
7. Discussion on implications of the future on specific groups in society
8. Consumers’ views about what future regulation will be required

All materials from the research, including sample specifications and screening questionnaires from the recruitment, pre-tasks, as well as the final agenda and materials from the workshops are contained in the Appendix to this report, which we have published on our website: <http://www.communicationsconsumerpanel.org.uk/smartweb/consumer-views-on-the-digital-future/consumer-views-on-the-digital-future>.

Section 4

Main findings

4.1 Core needs and what helps people meet them

- What will matter to people fundamentally is unlikely to change. 'Life needs' include personal fulfilment, social interaction, quality of life, and work satisfaction.
- People meet life needs in part by buying and using products and services. In doing so, they have certain 'consumer needs', which include quality, choice, ease of use, access and affordability.
- Participants place a high value on communications services and devices. These help meet life needs by increasing access to information, providing new ways of keeping in touch, increasing convenience and flexibility, and providing new ways of being entertained.
- However, technology is a means to an end and participants said that should this be reversed they would have a number of concerns.

In order to identify participants' current needs and priorities, a grounded approach was adopted, whereby participants were asked to complete a diary for a typical day as part of a pre-task exercise, and to identify what was important to them when going about their daily activities. In the workshops, participants worked in groups to identify what their priorities were in four realms of life: health and wellbeing; family and home; employment and workplace; and leisure and entertainment. These activities gave participants a framework in which they could think about needs and priorities in the context of their own lives.

Given the variety of people who attended the workshops, participants' needs and priorities naturally varied depending on their age, life stage and personal circumstances. For example, younger participants tended to be more concerned about leisure activities, parents were more likely to prioritise family time and working participants often focused on their commute. Nevertheless, a number of cross-cutting themes emerged that were relevant to all participants.

Overall, two types of common needs were identified in the research. The first we have called core 'life needs' and these are very much about personal fulfilment, social interaction and quality of life. Participants consistently identified as their main priorities in life: spending time with friends and family; learning or undergoing personal development; having relaxation or fun time; keeping fit and healthy; and deriving satisfaction from their work or vocation. Here is a selection of comments from the workshops:

"Having enough time to spend with friends and families [is important]."

Caernarfon

"I enjoy interacting with the family, especially the children."

Caernarfon

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"[I like] time to myself to relax but still keep busy and also to speak to and organise a night out so I can see all my friends."

York

"Being able to sit down and relax in front of the TV or Sky and just to chill out."

Glasgow

"Making sure that all aspects of my work are carried out thoroughly to ensure the safety of my staff and customers."

Caernarfon

"That I can complete and get paid for my work."

York

"For me, getting to the gym is a massively important part of my day."

Glasgow

"To enjoy the day but also be fully concentrated on school work."

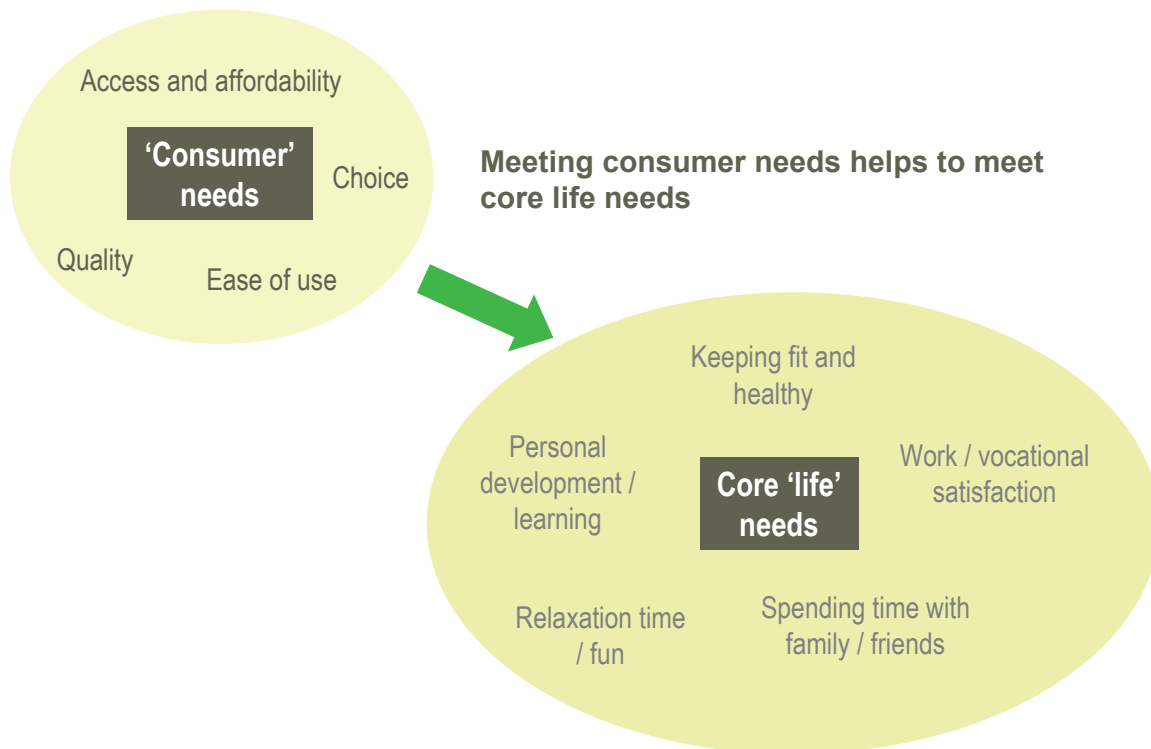
Caernarfon

"Catching up on what's going on around the world."

London

People fulfil their life needs in part by buying and using products and services. In doing so, they have certain 'consumer needs' which are also consistent and unlikely to change in the future. These include quality, choice, ease of use, access and affordability. Meeting these consumer needs will help to meet core life needs, as indicated in Figure 4.

Figure 4: Relationship between consumer needs and life needs



In a pre-task, participants were asked to identify advances or developments in the past 10 years or so that have benefited them. The word 'technology' was deliberately omitted so as not to lead participants.

The results of this exercise and related discussions demonstrate a widespread acceptance that communications-related advances have changed and improved people's lives. Participants nominated a range of modern communications services and devices that have helped them by:

- Increasing their access to information (e.g. 24 hour news channels, online news, satellite navigation);
- Providing new ways of keeping in touch (e.g. mobile, blackberry, social networking) and being entertained (e.g. iPod, gaming, Youtube);
- Increasing convenience and flexibility of daily transactions (e.g. oyster, internet banking, ebay, electronic scanning, devices that enable them to work from home/on the move); and
- Saving time (e.g. labour-saving devices).

It is the contribution of these developments to achieving people's life and consumer needs that was most valued by participants, as the following comments from the workshops show:

"The internet gives you access to things that you weren't able to readily get information on previously."

York

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"I'm able to access information that may be obscure or difficult otherwise to obtain."

Caernarfon

"When you've got a mobile you're never alone."

London

"Keeping in touch with colleagues, friends and family and old friends [has been made] more accessible."

York

"Entertainment has come on leaps and bounds through all sorts of televisions, gaming systems, mobile phones; basically everything has expanded through entertainment."

Glasgow

"Sky Plus lets you watch your favourite programmes anytime of day...Facebook and mobiles help with staying in touch with your friends."

Glasgow

"Saving time, with online banking you don't have to go to the bank."

London

"With the advance of home shopping it gives you more time to do things that need doing such as family, house, work etc. Everything can now be delivered to your door at the same price, most times cheaper than going shop to shop looking for the best deal."

Glasgow

A central theme across all age groups was the desire to keep technology in its place. Participants saw technology as a means to an end and wanted it to be the 'servant' and not the 'master'. They could immediately identify a number of potential downsides should this be reversed. These included the risk of:

- Less face-to-face and 'quality' communication, including in the home;
- Synthetic replacing real experiences;
- Loss of social and English language skills, and more sedentary lifestyles;
- Higher unemployment due to machines replacing people;
- Interruption of family time as a result of an 'always on' culture;
- Having insufficient back-up if things go wrong, particularly as offline alternatives are phased out;
- Greater social exclusion for those without access; and

- Increased problems with data security.

These concerns are highlighted by the following comments from the workshops:

“Technologies make us lazy by not actually getting out and doing things that we would have done years before....less and less we seem to be able to get that face-to-face and personal touch.”

York

“There’s going to be a lot less face-to-face interaction with people. I think people are going to be more isolated which can increase depression.”

London

“At the end of the day you go home and you sit in front of the TV and you watch it or you go on the computer – you spend no quality time with the family. It’s going to come to a stage where we’re all separated at the end of the day, everybody in a different room.”

Caernarfon

“We talked about technology replacing some basic skills and perhaps young people are not learning to write and spell as they used to because there are spell checks there and they lose the power of the written word.”

York

“There’s the thing about all government records being on the computer and every week there’s another story about them being lost.”

London

“If you can’t use a PC you won’t get a job.”

London

4.2 Emerging issues and their impact on whether needs will be met

- What is likely to be important to people in the future will be based on the constants discussed in the previous section.
- How people judge whether their needs are being met is likely to evolve over time, in response to new opportunities and challenges.
- Participants identified a number of emerging issues that they felt would impact on how their core needs and priorities are met in the future. These issues include macro social and economic trends, and developments in the consumer and technological world.

We asked participants in the research to consider:

- What factors will determine whether their life and consumer needs are met in the future; and
- What help they will require in order to meet those needs, including help to receive the benefits of communications technologies and to manage the risks.

A number of techniques were used to enable participants to identify how the future might impact on their needs and priorities. In order to identify existing unmet needs, participants conducted an individual 'wouldn't it be nice' exercise, looking at ways in which their current lives could be improved. A quiz and presentation were used to demonstrate current social and consumer trends (e.g. population changes, convergence, changes in viewing behaviour etc.) and help prompt participants to think about the future. Participants then imagined (both individually and in groups) what their needs and priorities would be if they were transported into 'Planet Future', ten years from now, considering everything discussed previously. To make the exercise more straightforward, participants were asked to imagine how their life at their current age would differ (rather than to imagine themselves ten years into the future and ten years older). These different exercises helped them consider how their expectations might change and what would be required to meet their needs in the future.

Several critical issues were identified as a result of these exercises and the ensuing discussions. Some of these related to what would be required to meet consumer needs in the future and others to what would be required to meet life needs.

a) Critical issues in meeting consumer needs in the future

This sub-section summarises those current and emerging issues which are expected to affect how consumer needs are met in the future.

i) Greater time poverty

Participants anticipated that the current issue of time poverty would increase in the future, as lives become more 'hectic' than ever before. As a consequence, participants expected that fulfilling daily tasks quickly and conveniently will become even more important. This will require processes to become ever more efficient, reliable and easy to use.

"In terms of needs and priorities, we think that everyone wants to be efficient, everybody wants everything faster."

London

ii) More information overload

Similarly, participants perceived there to be a plethora of information available already and they expected this trend to continue. This would mean more pressure to stay on top of information, which in turn requires information sources to be concise, up-to-date and relevant.

"[There is] so much information available now – where do you go? What do you believe?"

Glasgow

"There will be a lot more information from a wider range of sources but because there aren't any regulatory bodies for stuff on the Internet for example, the credibility of those sources is questionable. Reliability might be an issue."

London

iii) Greater proliferation of choice

As well as an increasing number of sources of information, participants also expected to be faced with more and more choice in products and services in the future. While this and other research has found that consumers welcome some degree of choice, they do not want to be overwhelmed with options. They would value help in filtering options and making the right choices.

"On the negative side, for some people it's complicated keeping up with the different technologies that are going on and there is also the fear of the unknown."

London

iv) New technological possibilities

Increased internet speed, and more on demand content and personalisation mean that consumers are already increasingly expecting to 'get what I want, when and how I want it'. Participants expect this trend to continue, resulting in even higher expectations that products and services will be available instantly and be more tailored to their individual needs.

"Tailor made, people will want things that are tailor made to their lifestyles."

London

"It will shift culture, it will shift values, because your expectations will be that everything can be instant and it should be instant."

London

v) More services moving online

Participants anticipated that technology, particularly the internet, would play an even bigger role in the future, both in delivery of commercial and public services. This development was welcomed to an extent because of the greater convenience it can provide. However, many indicated that they would like to see a role for face-to-face service delivery preserved. In addition, there was a widespread concern expressed that certain disadvantaged groups in society might be further disadvantaged because of their inability to utilise the online options. Particular reference was made to older people who do not know how to use the internet and

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to low income groups who may not be able to afford a computer and internet connection at home. Participants would like to see efforts taken to ensure no one misses out as a result of a more technological future. For example, participants suggested that communications services (particularly the internet) should be made more accessible, affordable and easy to use, and that offline alternatives should be preserved for those who need them.

“We think, hopefully, technology will be more accessible in the future, to everybody. Maybe there’ll be free internet access for everybody and most services that you need to use will be on an internet-type based system, where you can actually access it easily from wherever you are, twenty four hours a day.”

London

“More affordable mobile phones and internet so that everyone can have them.”

Glasgow

“Income came out first of all as being potentially something which could be divisive in terms of accessibility to technology, there seems to be a lag time between the availability of new technology and lower income groups [being able to access it], which creates problems potentially with the opportunities that people have.”

York

b) Critical issues in meeting life needs in the future

The research also uncovered a number of critical issues that will affect how life needs are met in the future. These were related to broader social and economic trends, and included:

i) Offline and online safety and security issues

Participants expressed fears and anxieties about both online and offline developments. There was a general sense that the world is becoming increasingly uncertain, especially in the light of current global political and economic instability, and there were also closer to home concerns such as a widely held perception that crime is increasing (despite the evidence to the contrary).

With respect to the technological world, there was considerable concern about data security, particularly in light of some recent high-profile stories of government departments losing data and of continuing reports of fraud and identity theft. Participants’ comments indicated that they are generally seeking more protection where possible, particularly with respect to the security of their data but also in relation to their privacy as users of online services. Parents were particularly worried about the risks to their children on the internet, which they felt they would not be well-equipped to monitor if they were not confident users themselves. They would welcome more education about the risks and how to respond to these.

“We thought about security, we talked about identity theft again, systems breaking down. We said that along with security, terrorism, that people will be hacking into government systems, to try and get information about what’s going on and because so much information will be stored on there, it will be valuable to a lot of different people.”

London

“People have so much information about you now, and you don’t know where it’s going to, and I think that’s really worrying [for the future], but I’m not sure how individuals can actually control it.”

London

ii) Health trends and lifestyle challenges

Participants saw a clear need for people to be more focused on their own wellbeing and longevity in the future. With trends such as an ageing population and new medical advances for those with long term conditions, it was seen as increasingly important for people to learn how to live independently and stay healthy for as long as possible. It was expected that pressure on the health services would result in less opportunity to see medical professionals face-to-face, and more onus on individuals to source information to help them understand and manage their own health. There was also seen to be a need to focus more on preventative healthcare in response to modern lifestyle challenges such as smoking, alcohol and obesity. To do this, participants identified a need for more information and support to be available to help them stay well and independent.

“People are getting older – there are going to be different medical requests from them.”

Glasgow

“We think there’d be more need for interaction on the internet, you know, doing some sort of self-diagnosis... Personal health information is going to become paramount.”

York

“[We will need] more technology that enables individuals to monitor their own health – and more importantly, wellbeing e.g. what vitamins they are lacking.”

Glasgow

iii) Effects of climate change

Participants felt that the effects of climate change, as well as higher energy prices, will mean that it will become imperative for individuals to live more sustainably. Their expectation was that government will help influence behavioural change through the use of incentives for good environmental behaviour as well as penalties for those who do not comply with the minimum requirements. Participants felt that individuals would also be motivated to change their behaviour to save costs, particularly with respect to energy consumption.

Participants envisaged a future where they would be travelling less and relying on technology more (e.g. home working, video-conferencing etc). They were surprised at how much energy consumer products use (a fact shared in the quiz exercise) and felt that some work was needed to make these products more energy efficient.

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“One thing that does concern me, and I think will be a big change in ten years, is going to be the restrictions on energy.”

Glasgow

“We would like to see more efficient and reliable public transport so it’s polluting less... We can also see more people working from home so that would also mean less congestion on the streets and less pollution.”

Glasgow

“Working from home – the ability to – will help to reduce our carbon footprint because while you’re working from home you’re using less emissions.”

York

“We need to make [technology] better, make it more environmentally friendly; we need to develop more solar energy things.”

Caernarfon

iv) Social/economic trends and government policy

There was also an expectation that people will need to take more personal responsibility in the future. They assumed that they will not be able to rely on the government to the same extent because of pressure on resources. Participants had already noticed this development in pension provision and healthcare, and expected a growing individual contribution to the environment as noted above. There was also a feeling that people will need to take responsibility to guard against some of the potentially negative effects of developments in technology. For example, participants felt that parents have primary responsibility for monitoring their children’s internet usage and protecting them from harm.

However, to enable people to self-help and be personally responsible, a need was identified for information and support to be available to build people’s capability in different areas of life and equip them to take on this role.

“In ten years time, I think people are going to be a lot more focused on their financial organisation.”

York

“There won’t be as many doctors or GPs around so they’re setting up the NHS 24 just now – that will come in for a lot more use.”

Glasgow

v) Changing social and work patterns

Changing work, family and social patterns were seen to require greater adaptability and flexibility in everyday life. Participants reported that they expect that changes in family responsibilities and employer expectations will require them to work more flexibly (e.g. flexi-hours or home-based working).

Linked to this, they anticipated that uncertainty in the job market, and the lack of guarantee of long-term employment, would necessitate that people continue developing their skills throughout their working lives to enable greater career flexibility. Some imagined that

unemployment may increase as technology and machines take over the role of humans. However, others saw opportunities for new types of jobs. Similarly, there were mixed views about whether we will be working longer or fewer hours in future. Either way, participants saw it as critical moving forward to develop the necessary skills and adaptability to work in new and different ways.

Geographical dispersion of families was also seen to require people to be more mobile and for better transport links to be available. Participants noted how communications technology and services have already made marked differences to the way they interact with friends and family (e.g. communicating with people abroad via Skype when a few years ago they would have relied on letters). Therefore participants' high expectations about how communications technologies and services could assist people in being more mobile, flexible and adaptable in future.

"Things like lots of reduced office space, people more hot desking and working from home, so people need to be more flexible."

York

"There will be more virtual interaction with video conferencing, so less need to be in an office physically."

London

c) A key cross-cutting theme

Looking to the future, there was a strong expectation that technology would continue improving:

- In how it works (even faster, more accessible, more affordable, easier to use, more reliable and energy efficient); and
- In what it does (providing new and better solutions to people's needs).

However, a central theme across all age groups was the desire to keep technology in its place. For example, participants were very clear that they wanted to maintain a balance between technology and 'real life'. To achieve this, participants felt it was important to stay active and maintain some degree of personal interaction.

"In terms of needs and priorities, we think that everyone will want to be more efficient; for everything to be faster and more accessible as well."

London

"We will still need basic human interaction because that is part of being human isn't it and without that what have you got?"

Caernarfon

4.3 Implications for Government, regulators and service providers

- Government, regulators and service providers were each seen as having a role to play in relation to developments in the communications sector. Individuals were also seen to have responsibilities.
- Participants identified four priorities to be addressed in order to manage the impact on the public of developments in communications. These were security and privacy, equality of access, information and support, and reliability and back-up.
- It was felt that technology could potentially help vulnerable and disadvantaged groups provided that they were able to access and make use of it. Participants felt that it was important that the digital divide does not increase.

Participants briefly considered the implications for government, regulators and service providers, drawing on their previous discussions. Specifically, they explored:

- The impact of 'Planet Future' on specific groups in society;
- What would be required to maximise the opportunities and minimise the risks identified, for both specific groups and society as a whole; and
- Who should be responsible for meeting consumers' requirements.

Participants saw both central and local government as having a role to play with respect to managing communication and technological advances – central government in terms of setting policy and rules, and local government in terms of delivering services and education. In addition, industry was perceived to have a role to play in making technology affordable and user friendly, and also in warning people of the potential risks involved.

However, participants also expected individuals to assume a degree of responsibility themselves. This was particularly the case for parents who participants felt should protect their children against risks associated with technology. As discussed above, participants felt that individuals should be given the information and tools to enable them to fulfil their responsibilities.

Participants raised four overall themes that they felt would be particularly important when considering how to manage the impact of developments in the communications sector on consumers and citizens. These were:

- Security and privacy;
- Equality of access;
- Information and support; and
- Reliability and back-up.

a) Security and privacy

As previously discussed, ensuring the data security and privacy of consumers was identified as a key priority. Participants recognised the potential benefits of information-sharing but indicated that they would embrace communications services fully only if they trusted companies, service providers and government to treat their personal information with care. Some called for sufficient policing and penalties to be instituted for those committing cyber crimes. There was also a suggestion that technological developments which would increase safety should be sponsored by government or industry. Educating people about the risks so that they can take responsibility in this area was also seen as critical, particularly with respect to parents protecting their children.

“Do we need to have a body of people to control the information superhighway? We’ve got the UN now haven’t we, to sort out our wars and things like that; will we need something like that in the future?”

Caernarfon

“Better policing, monitoring, so for example ... to make sure your children are always safe online and make sure everything online is safe for them to view and finances so you can actually check, do your internet banking without worrying who’s seeing this, who’s doing this?”

York

b) Equality of access

Developments in digital communications were seen as potentially bringing particular benefits to vulnerable groups in society (e.g. older people, those living in rural areas, Black and Minority Ethnic groups and people with a disability) by reducing social isolation, increasing access to services and providing greater opportunities to lead independent lives. However, these groups were seen as not currently best placed to take advantage of these benefits. Participants felt that a number of barriers needed to be addressed to prevent vulnerable groups from being further disadvantaged if more service delivery moves online.

An important finding was that some participants saw basic access to the internet as a ‘right’ in the same way as access to utilities is. While they expected those who could afford it to pay for internet provision, they wanted government to ensure that access is possible and affordable for all. There were specific suggestions to expand infrastructure and to provide free equipment or subsidies where required.

They also saw the need for public services to continue to be offered offline as well to ensure that consumers who cannot or do not wish to use digital communications are still able to access them.

“We talked a bit about our concerns about there being a greater divide between younger people and older people, a greater divide between people with high incomes and low incomes and a greater divide between people from rural areas and from urban areas, so some of the ideas that people came up with to try and counteract this were things like offering technology classes to older people, giving free laptops for the over 65’s, actually just giving everybody free internet access so that everybody is able to benefit from the internet.”

Caernarfon

“If you have this digital divide... then the people who have [access to communications technology and services] are going to have access to the jobs, to health, to everything.”

London

c) Information and support

Increasing complexity was one of the key expectations for the future, both as a result of ever increasing information sources and a further proliferation of choice. In response to this, participants indicated that they could benefit from more help from industry and regulators to cope with more complex decisions. They also indicated a need for more help to ‘help themselves’ in terms of meeting their own responsibilities with respect to digital communications. For example, people who lack capability and confidence with technology would require training or coaching to ensure that they can harness communications services to meet their needs. Another example is that parents would require clearer information on the risks to children from the internet, and what to do about this, to enable them to better protect them.

“Training and awareness for the elderly to support them on this technology and then just making it simple so that it’s not confusing. It’s easy if there’s more awareness of where to go to fix things, so a help desk [would be useful].”

York

“[We need a] Citizens’ Advice Bureau for technology.”

York

d) Reliability and back-up

Given the likelihood that people will be increasingly reliant on technology for their daily needs, participants saw it as important that technology does not fail them. It was therefore a key priority that services and devices are reliable and that there is technical back-up if things go wrong especially given that, with increasing convergence, there is less understanding or awareness of how and where to access recourse in such situations. It becomes a particular worry when, with a move to providing services online, there are no alternatives available when things go wrong. Participants noted instances where this has already happened, for example with the Oyster card, and expect to see more of these occurrences in the future. They want to be able to rely on government and private organisations to make provisions to prevent such instances.

“If we’re all more dependent on technology then the need for back-up plans when the technology fails is actually going to be something that we need to have.”

London

The above points emerged as the issues of most concern to participants. Participants were also concerned about ensuring the credibility of information and enabling consumers to get redress if they have a complaint. But, these were not such strong themes as those outlined above.

As mentioned in the Executive Summary, the findings of this research are being used to help determine what future policy and regulation will be required in the communications sector. To this end, the implications were considered at a workshop held on 1st December, 2008. This involved some members of the Communications Consumer Panel, and representatives of the Department for Culture, Media and Sport, the Digital Britain Project Team, Ofcom, Opinion Leader, Which? and the Consumer Forum on Communications. It was also attended by two participants in the research. The Communications Consumer Panel also spent some time deliberating over the research and interpreting the findings. Its thinking about the implications of the research is summarised in the Foreword to this report.

