

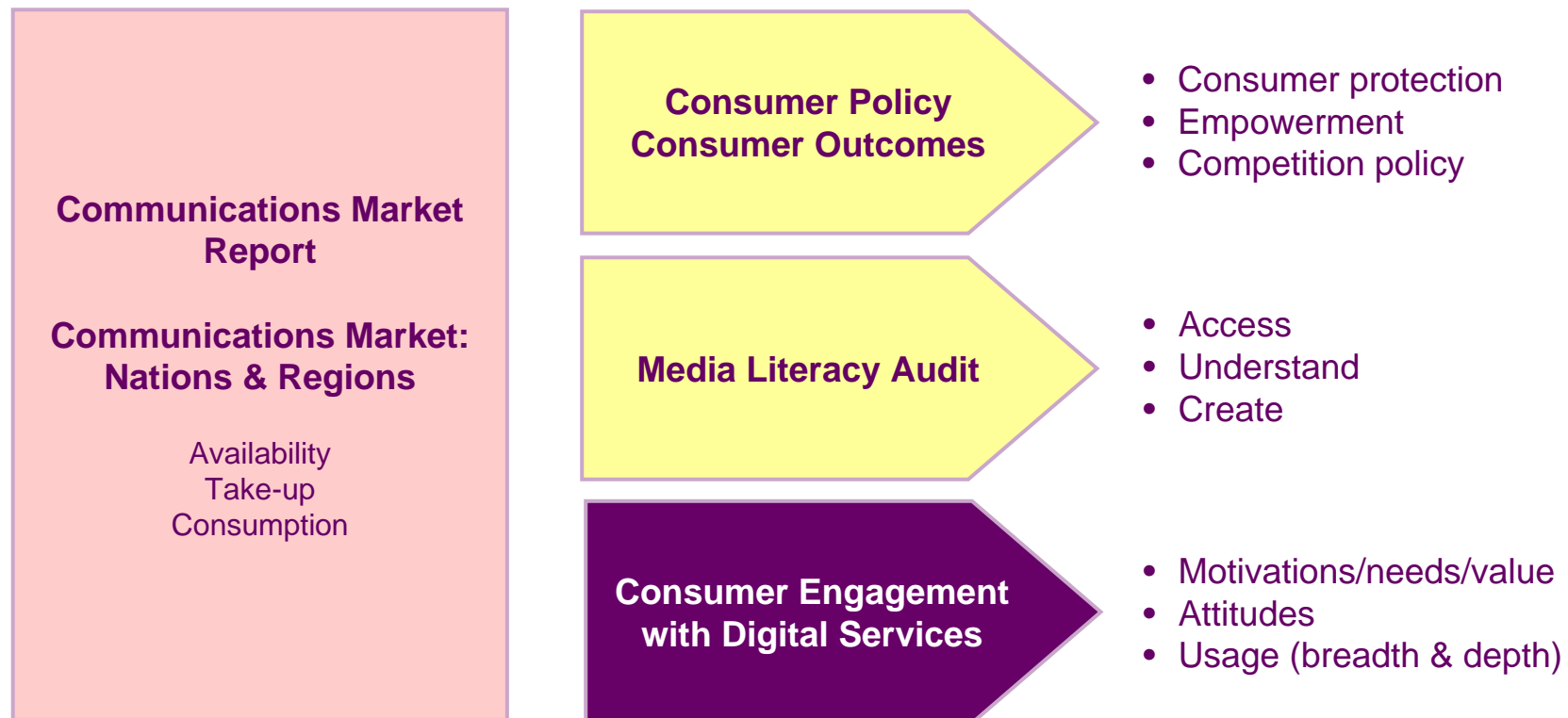
Connecting Older People: Consumer Engagement with Digital Services

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Consumer engagement with Digital Services: Objectives of the Research

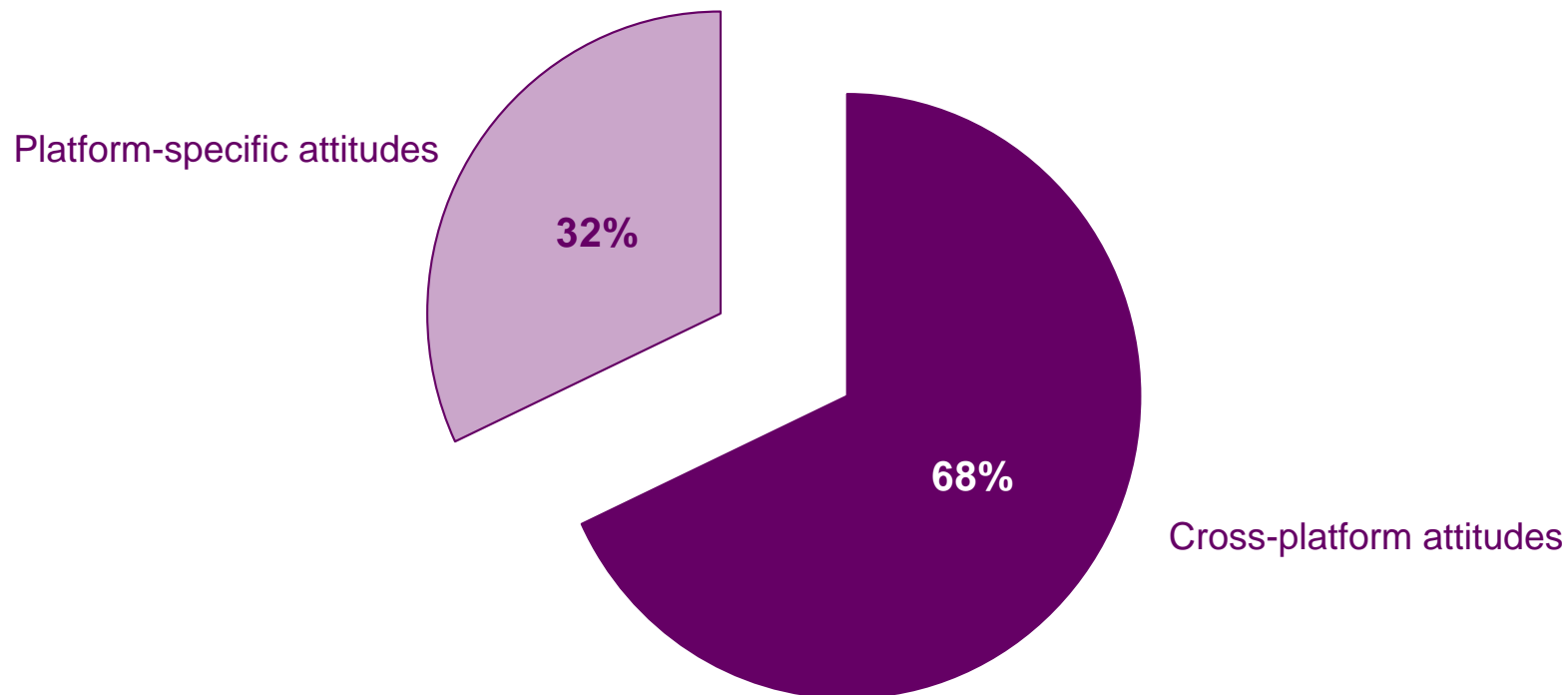
- To build an over-arching picture of consumers' attitudes towards digital communications services
- Across TV, radio, the internet and mobile/portable devices
- Specifically focusing on the way they value communications services

How does it fit with recent & upcoming projects?



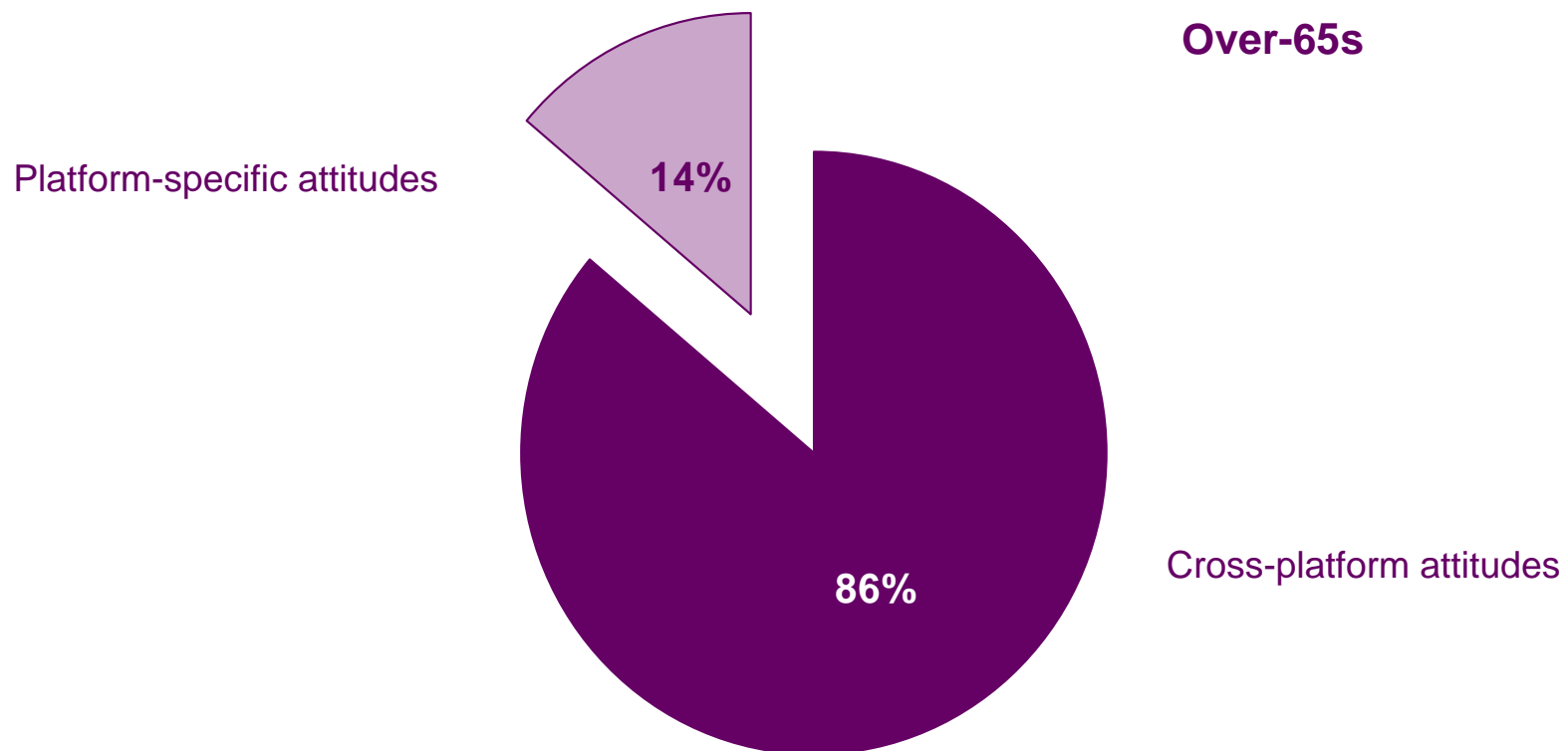
Individuals typically have the same broad attitude towards each of the four main digital communications platforms

- Over two thirds of consumers think about digital communications services in terms of cross platform attitudes

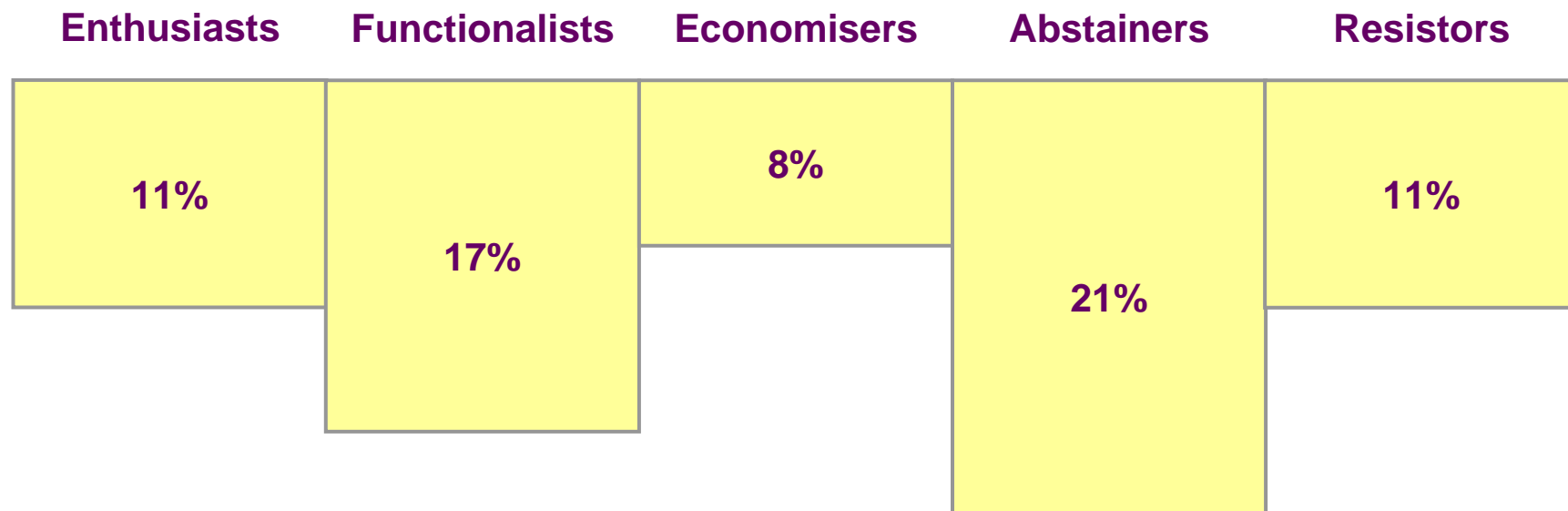


Individuals typically have the same broad attitude towards each of the four main digital communications platforms

- Amongst over 65s, this figure rises to 86%



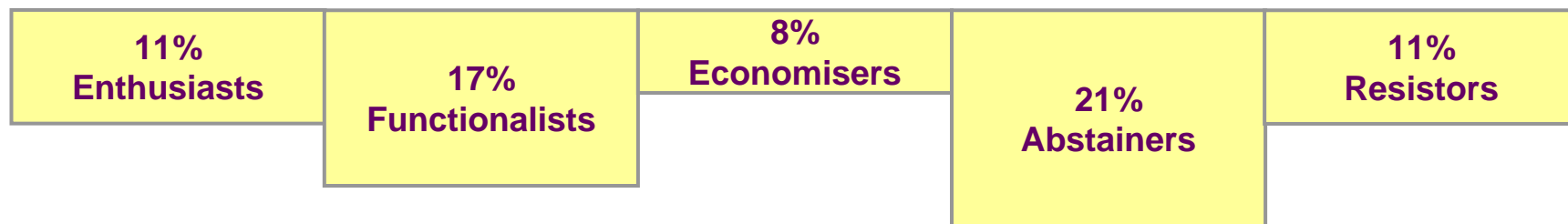
The research identified 5 cross-platform segments



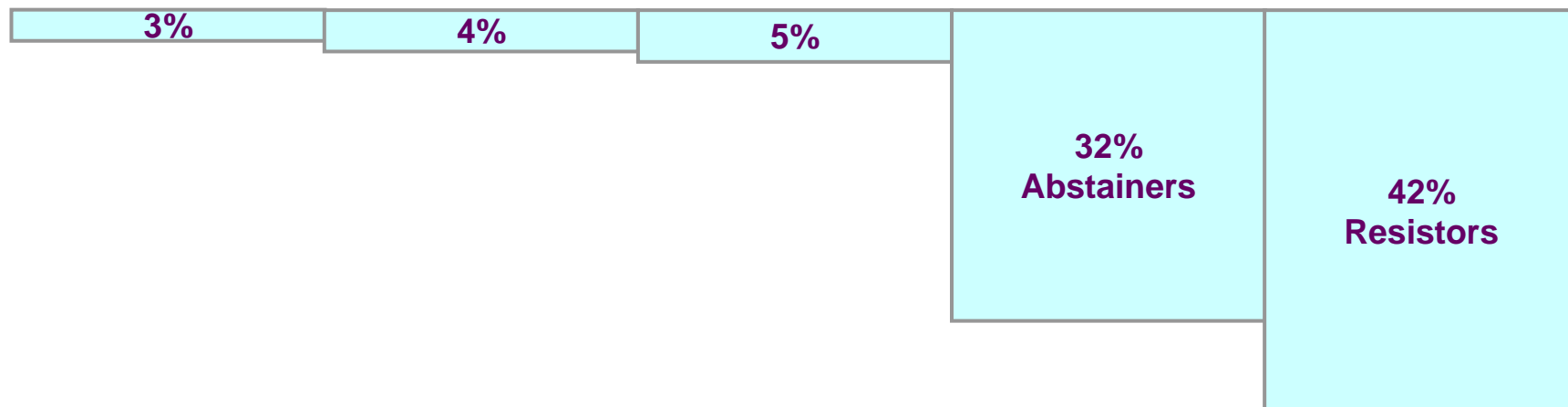
The cross-platform segments

- The majority of those 65 or over (73%) were classified as **Resistors** or **Abstainers**

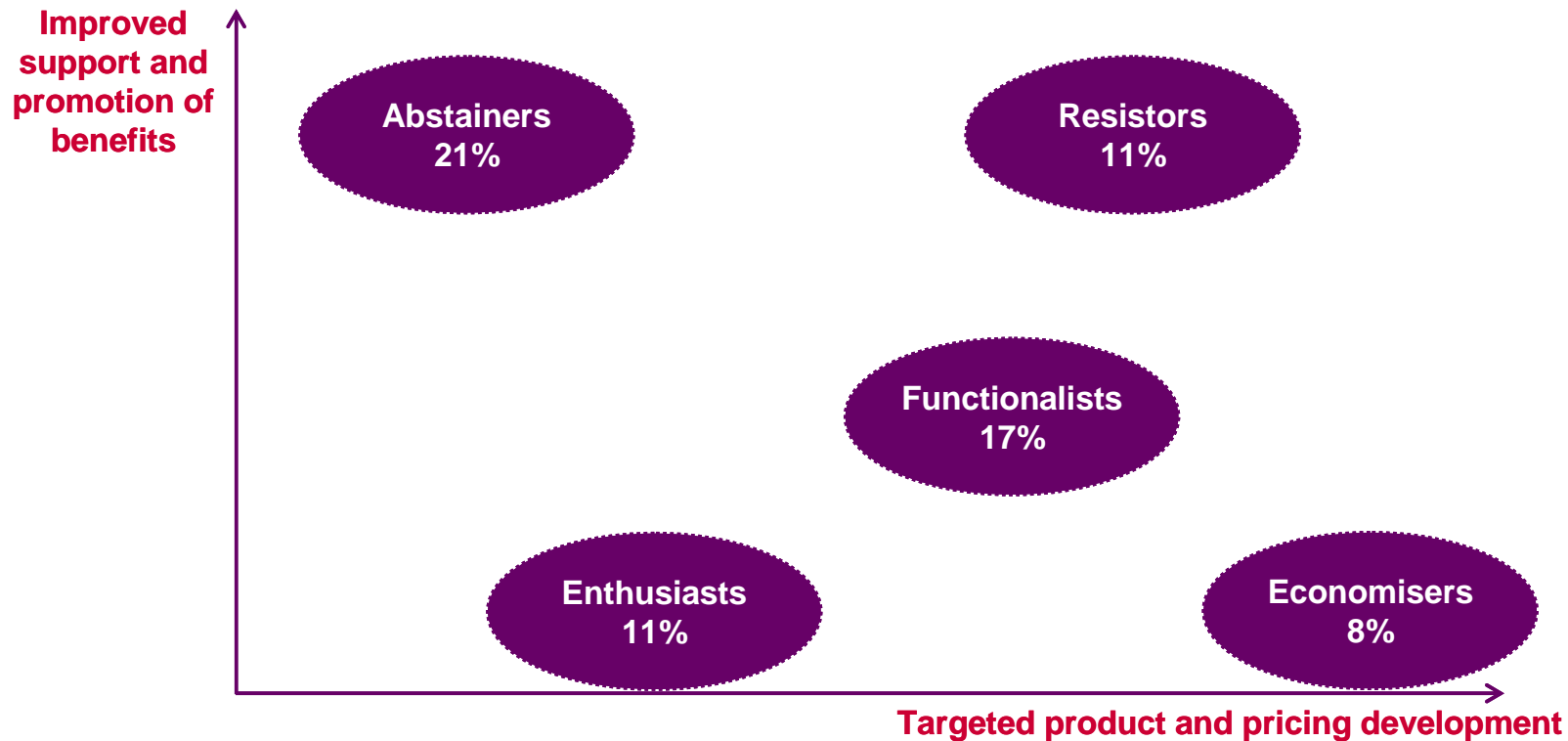
UK adults



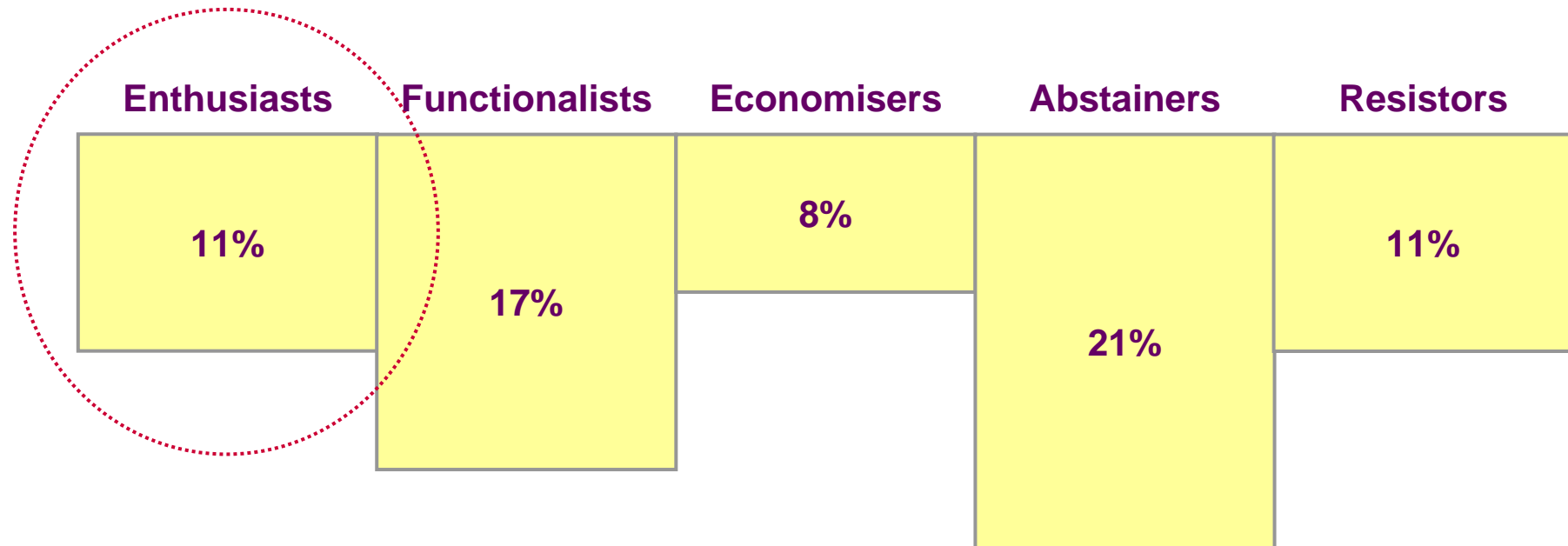
Those 65 or over



Meeting the needs of the 5 cross-platform segments

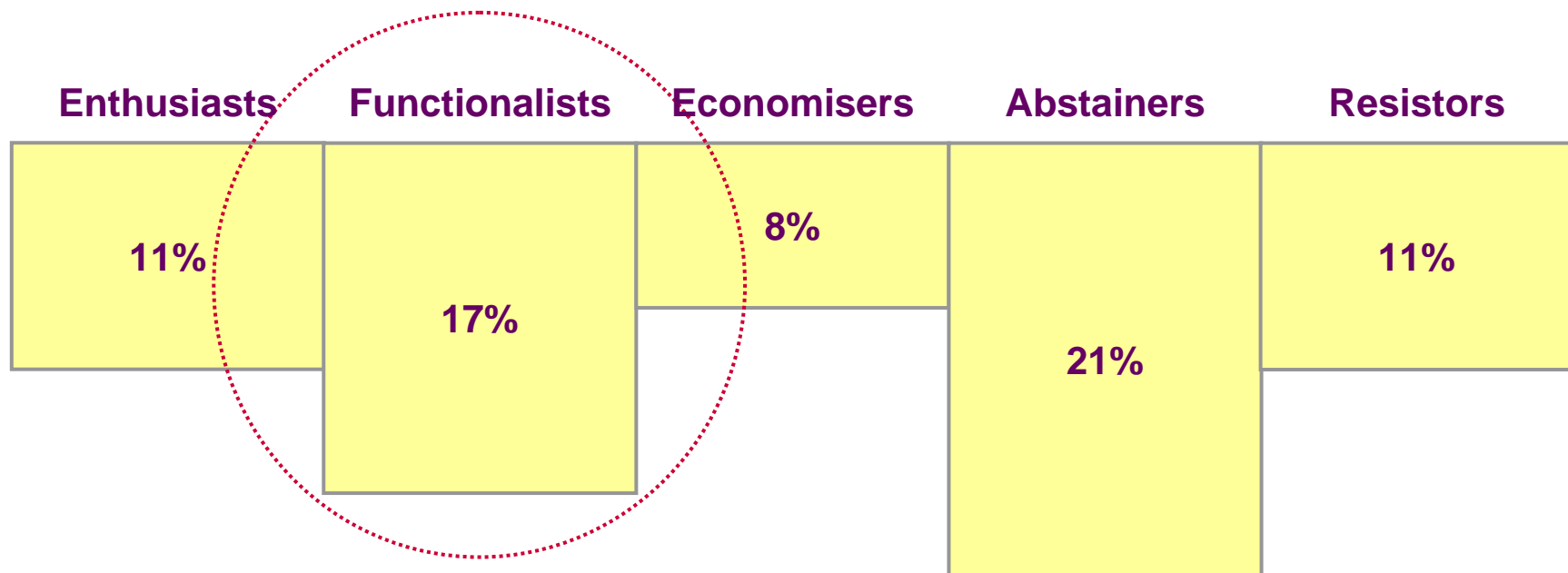


Focus on the Enthusiasts



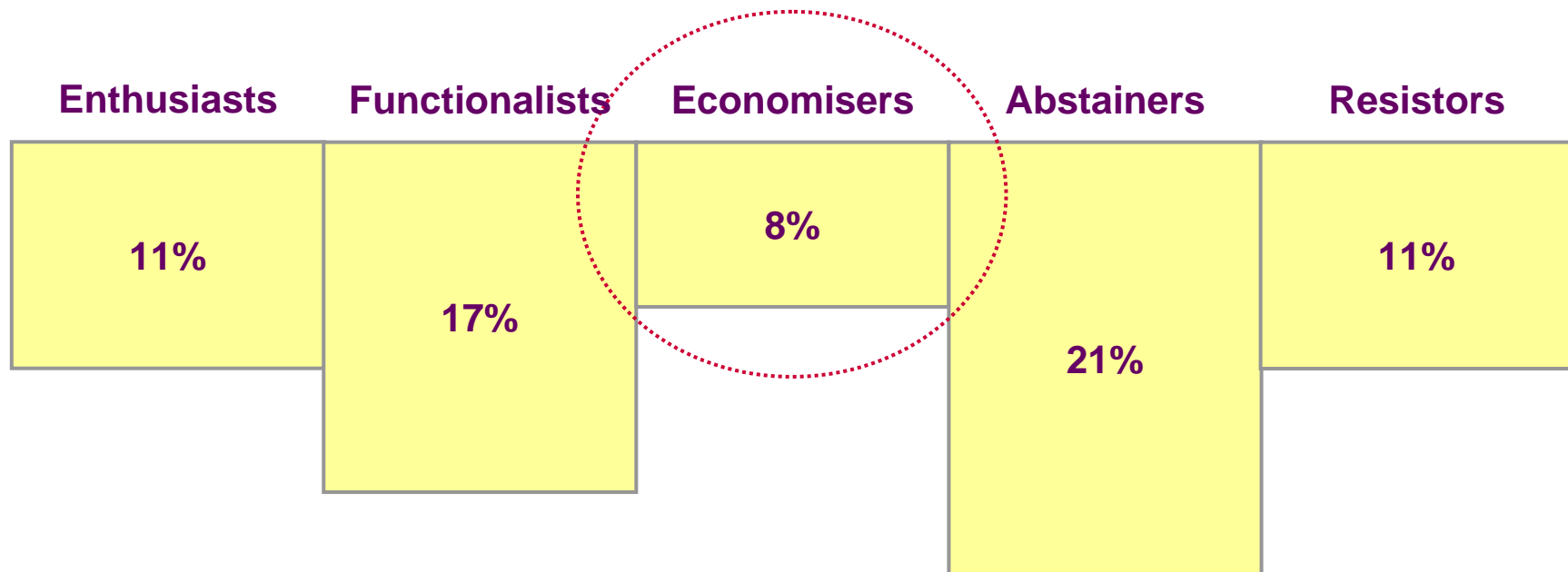
- **Their engagement:** Keen and adventurous digital users for whom technology plays a broad and important role in delivering practical benefits and social or leisure opportunities
- **Their challenge:** A hectic work and personal life often takes priority over further digital exploration. Therefore, these individuals are not always taking advantage of some of the functionality they might value
- **Their need:** A fast-track through to new benefits/features (via convergent devices?)

Focus on the Functionalists



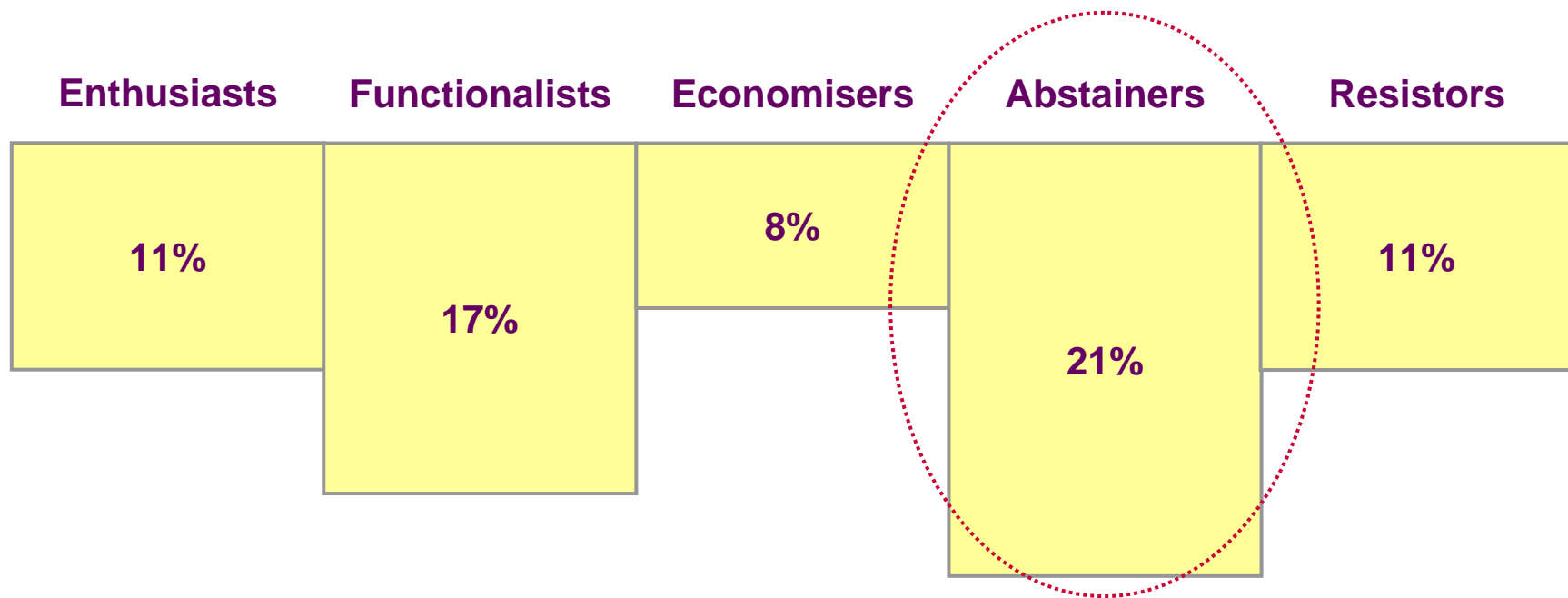
- **Their engagement:** Very confident with and feel knowledgeable about technology, but engage with digital services in a cautious and considered manner
- **Their challenge:** Whilst open to new developments, they are only prepared to broaden their horizons if there is a very clear benefit to them
- **Their need:** “Fit for purpose” products and services without bolt-on bells and whistles

Focus on the Economisers



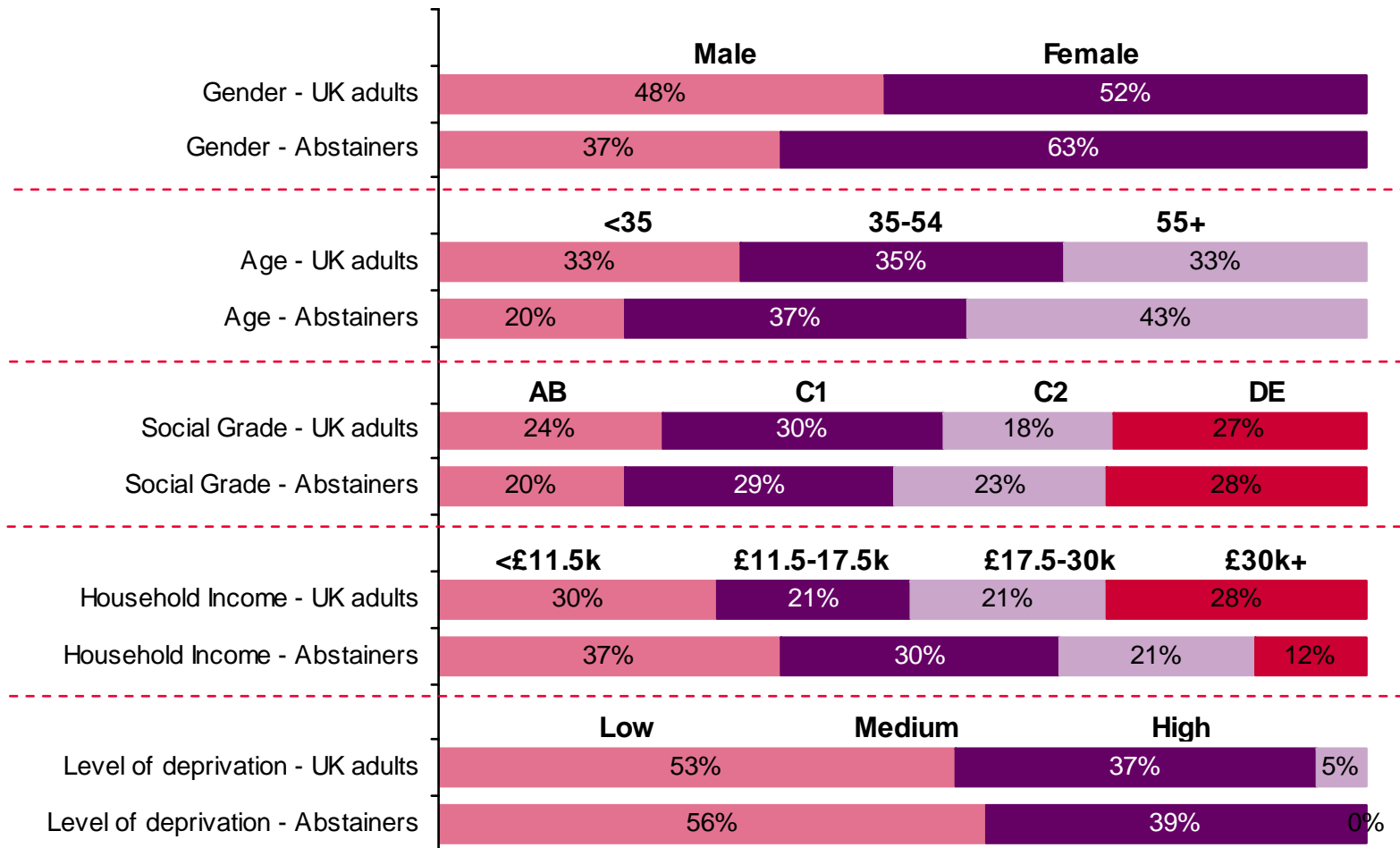
- **Their engagement:** See clear value in the full range of benefits that digital services can offer and take advantage of the platforms at their disposal
- **Their challenge:** Costs may be limiting further uptake and usage, particularly of the Internet
- **Their need:** An affordable entry point and products/services with reasonable ongoing costs

Focus on the Abstainers

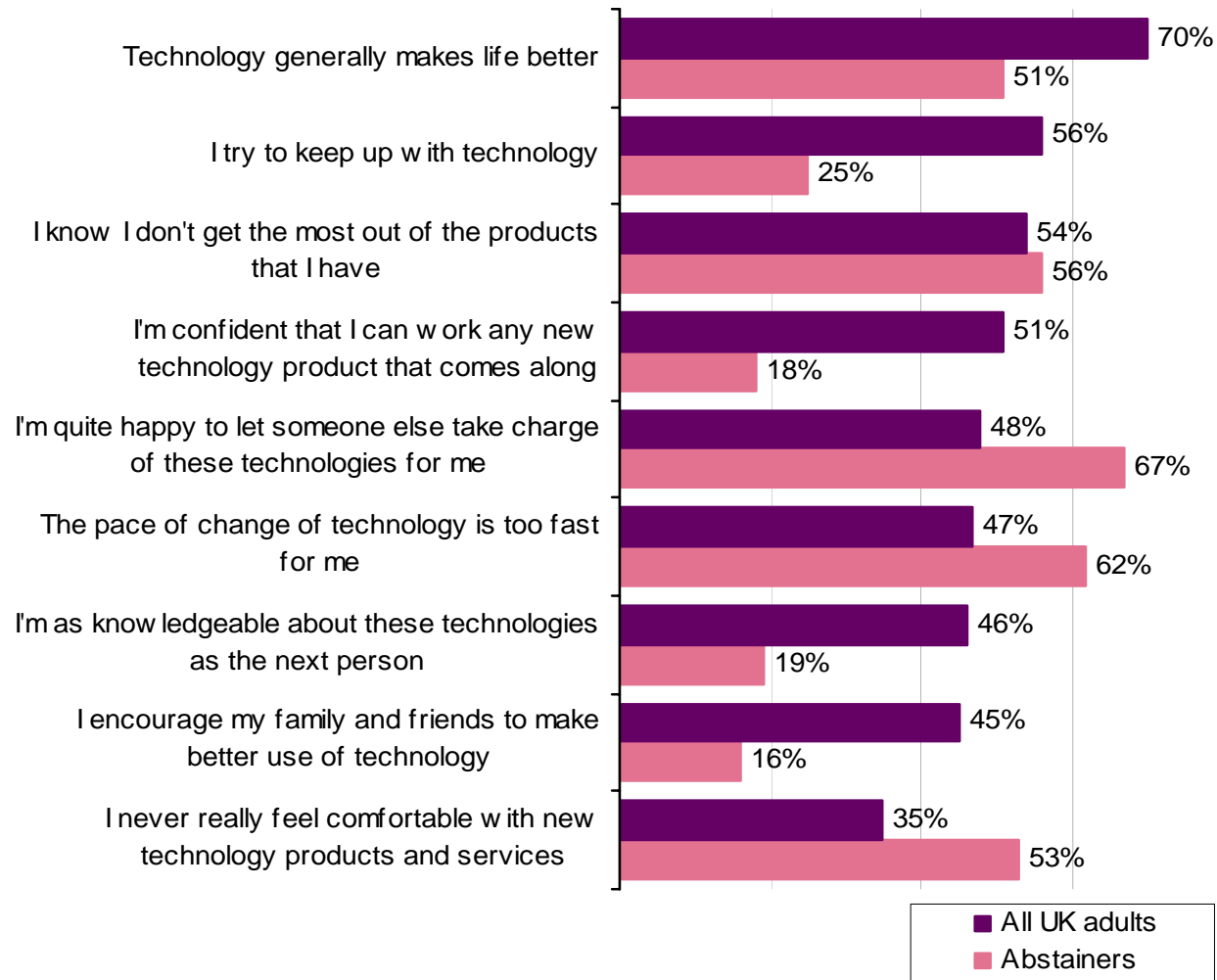


- **Their engagement:** Often have access to digital services at home but usage is very light
- **Their challenge:** Due to lack of confidence and knowledge, many have taken the easier option of turning their back on digital services
- **Their need:** Considerable back-up to get them started and to help them gain confidence and experience in the use of digital communications services

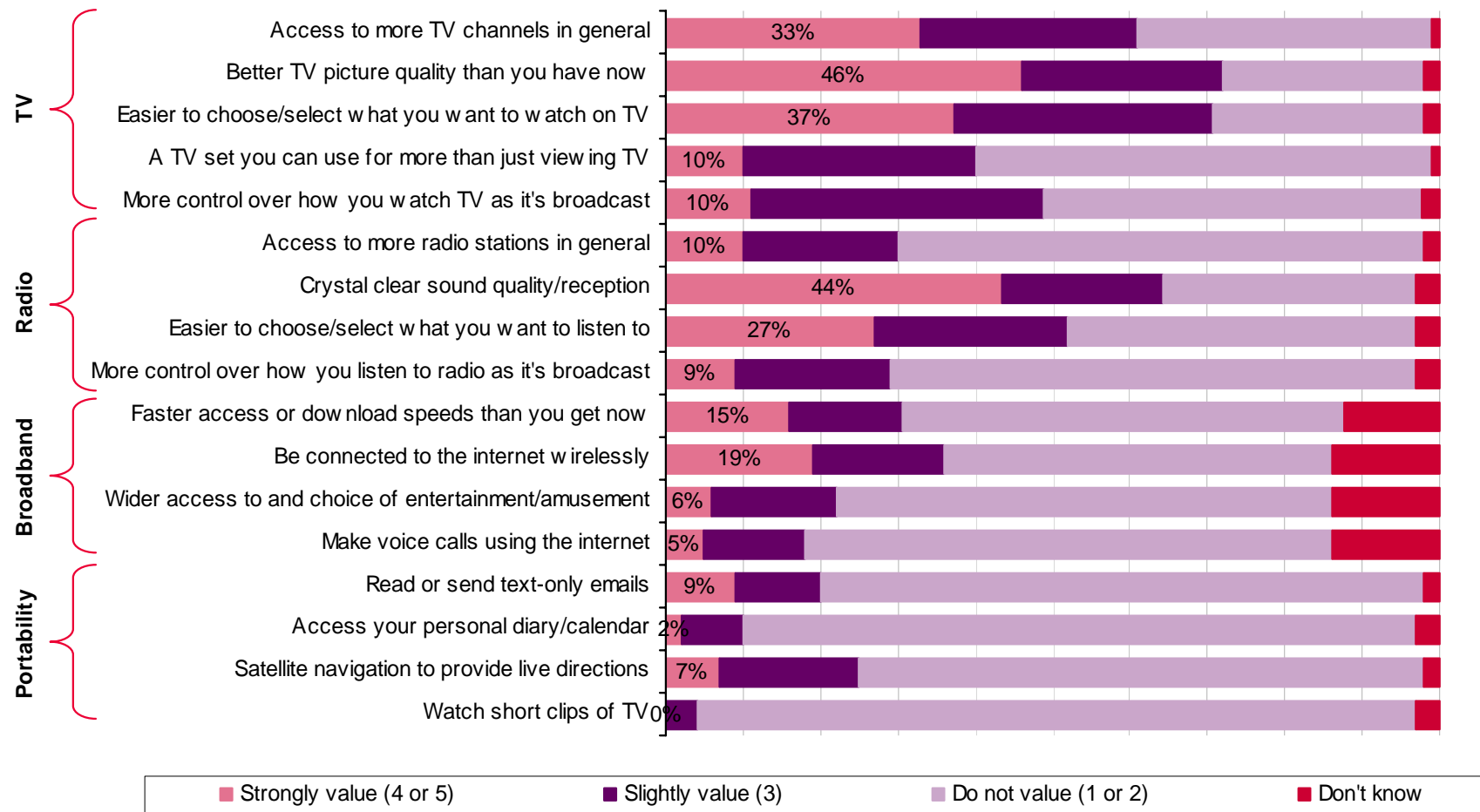
Focus on the Abstainers – who they are



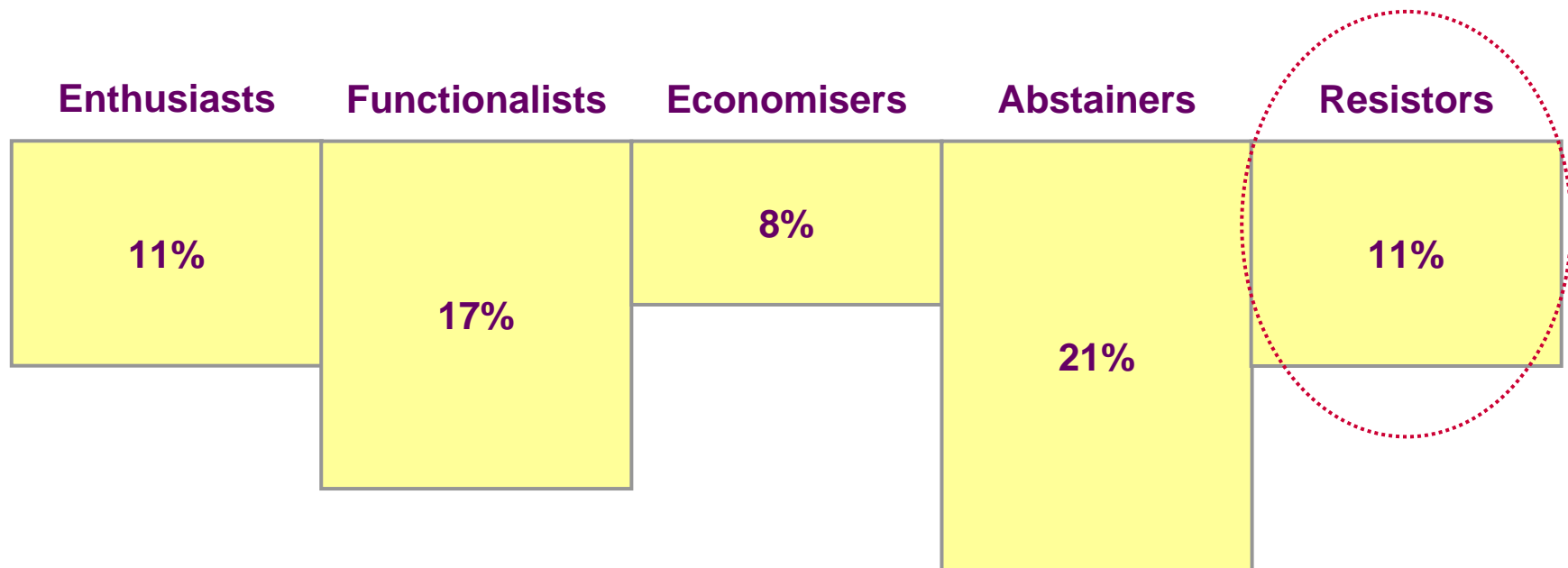
Focus on the Abstainers – attitudes to technology



Focus on the Abstainers – the things they value

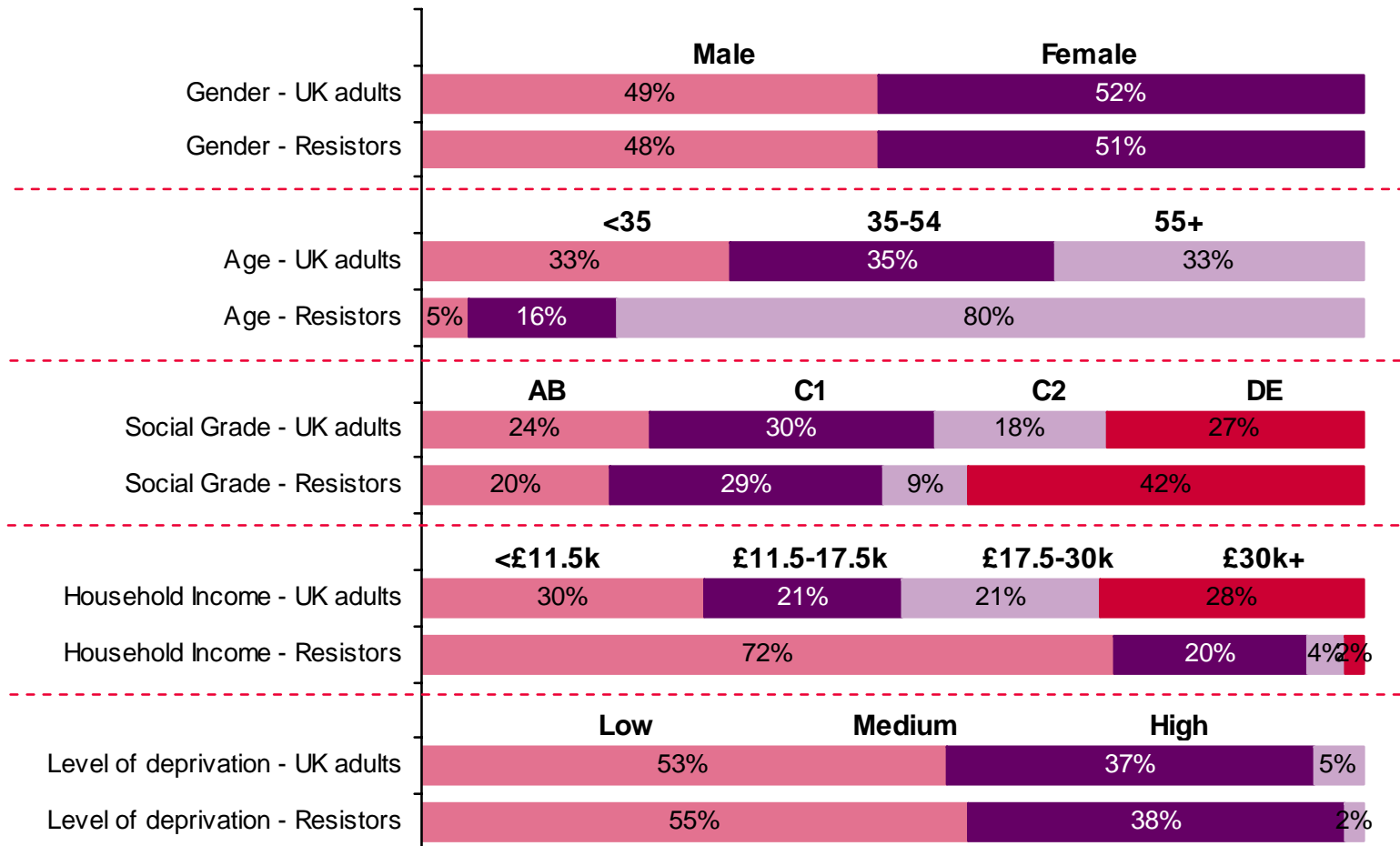


Focus on the Resistors

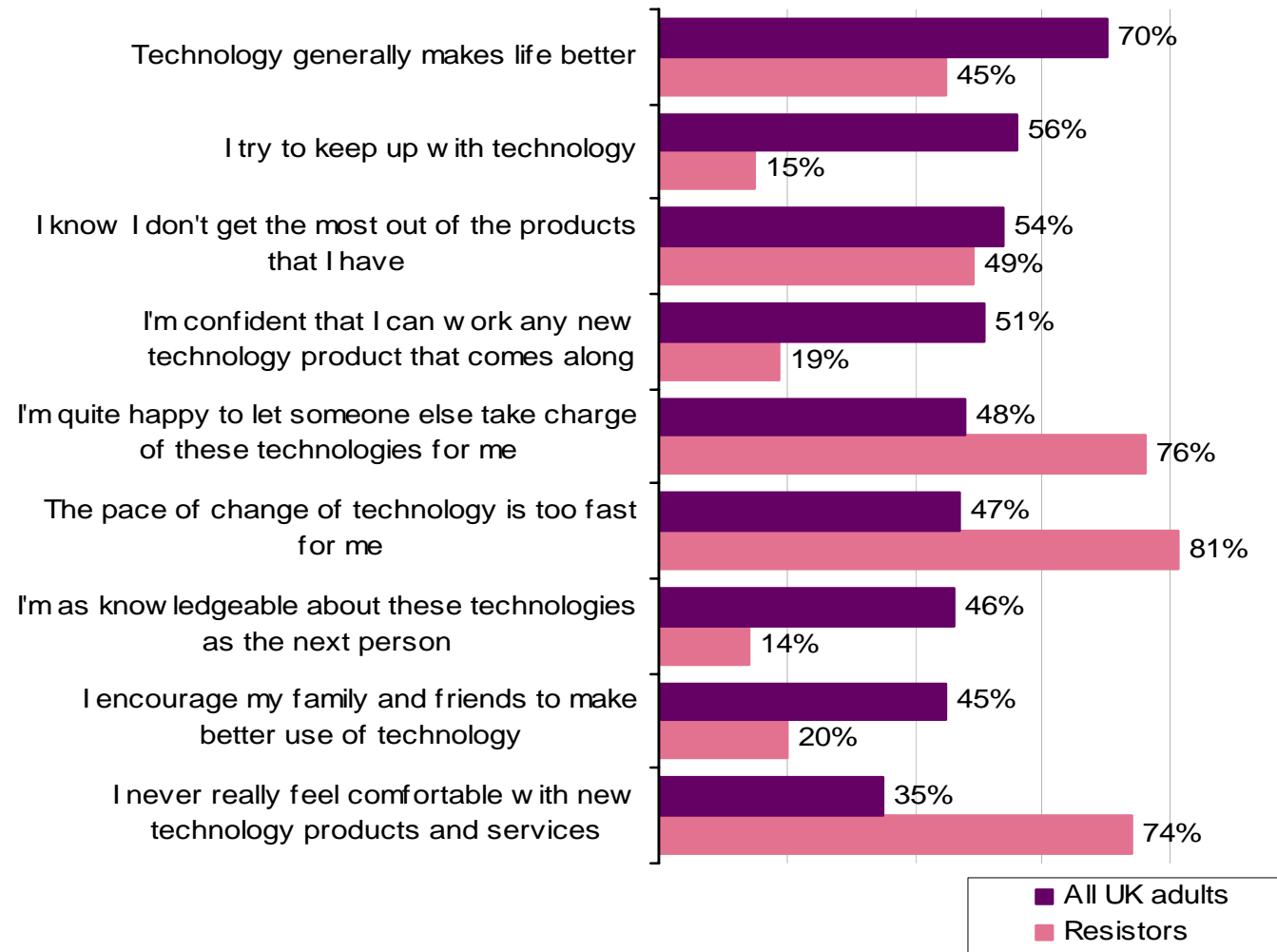


- **Their engagement:** Detached from digital services, believing them to be of little relevance to their lives - and actively resisting technology adoption
- **Their challenge:** This initial rejection frequently masks a sense of being daunted by technology and a desire for (coupled with a lack of awareness of) digital products and services that primarily make things easier and simpler, rather than more complicated
- **Their need:** Better articulation and manifestation of how digital services could really be of benefit to them

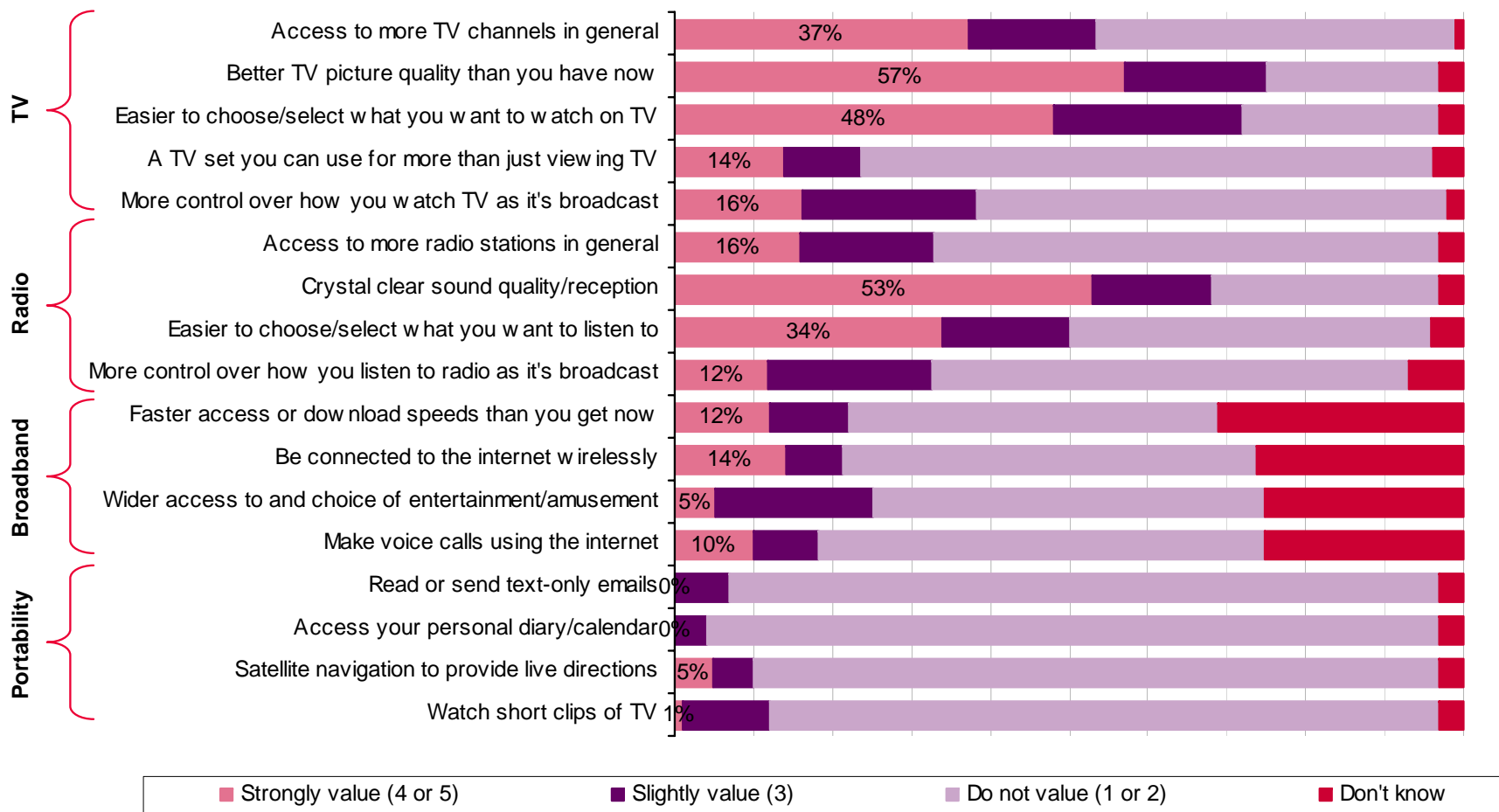
Focus on the Resistors –who they are



Focus on the Resistors – attitudes to technology



Focus on the Resistors – the things they value



Segment summary

	Enthusiasts	Functionalists	Economisers	Abstainers	Resistors
More likely to be...	Minority ethnic groups From metropolitan areas	More affluent Male	Younger Lower income From metropolitan areas	Older female Less affluent	Older
Most likely to own and use...	Everything	Everything within reason	Everything except the internet – but with one eye on the cost	A mobile phone (but live in a household with other devices they don't use)	Nothing
Most likely to say...	I couldn't do without it	Would I really use that?	I'd really like to be able to do that	My partner/children use all that	It's just not for me
Most likely to be put off by because...	I've too many other things to do	I don't have a use for all this	I can't afford it	I don't know where to start	I'd get no value or benefit from this
Most likely to need or want...	A fast-track (Convergent devices)	Straightforward – no bells and whistles	Lower cost entry point Lower ongoing costs	Ongoing support and guidance	A reason to believe - awareness of the benefits for them

Policy implications

- The Consumer Engagement with Digital Communications Services research will inform existing policy workstreams including:
 - Digital TV switchover
 - Digital radio switchover
 - Media literacy
 - USO
 - Other Consumer Policy/OCP initiatives

Next Steps

- Publish standalone research report (13 July 2006)
- Monitor shifts in the incidence of attitudinal segments over time
- Deep dive to explore incidence of key segments within:
 - UK Nations
 - English regions
 - Minority ethnic groups
 - People with disabilities