


GETTING ON

A Manifesto for Older People in a Networked Nation, from Race Online 2012



“I’m still with my son and two-year-old grandson, even though they’ve emigrated to Australia – I saw him open his Christmas presents, I was there in the house with them. He came and kissed the screen. It stops you feeling alone.”

Lucy Berry, 80, Age UK Joint Internet Champion of the Year 2010



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Foreword – Martha Lane Fox, UK Digital Champion

The first official visit I made in my role as Digital Champion was to a UK online centre under the A40 flyover in West London. The place was packed with older people avidly Skype-ing grandkids, booking holidays and watching old show-tunes on YouTube. 'You tell the Prime Minister,' one of them, giggling on a Nintendo, told me, 'if we weren't in here we'd be costing the state money.'

Today, we have nearly 10 million over-65s in the UK – and life expectancy continues to rise. This demographic reality means there is an overwhelming impetus for us to challenge incumbent ways of delivering care and services to older people in the UK. Technology will inevitably play a part in this.

Happily, as those older people bursting with life in that West London computer-training centre showed, technology has a vital role to play in empowering individuals to age successfully too. Last July, I published my Manifesto for a Networked Nation, which laid out a challenge for people and organisations in every sector and in every corner of the country to work together to inspire, encourage and support as many people as possible to get online by the end of the Olympic year.

One specific goal was that no one should retire without Internet skills. This demographic remains a key concern for us because we know that older people, of whom 5.7 million are currently offline, have as much if not more to gain from access to the Internet as the rest of society.

Introducing older people to the online world will enrich quality of life for millions across the UK and allow industry, charities and government to deal with our ageing demographic in a very much more enlightened and positive way.

Thanks to Age UK and Intel for their help with this report – which brings together customer insight with a framework for action that I look forward to building on with our Race Online 2012 partners.

Foreword – Tom Wright, Chief Executive, Age UK

Digital technology is of ever-increasing importance to older people and those who support them. At a time when there is increasing impetus on both public services and business to save costs by moving services online, it is crucial that the interests and needs of older people are not overlooked.

This is why we welcome the attention and focus of this Race Online 2012 report which highlights the concerns and opportunities for older people and how we can work together across government, industry and third sector to overcome them.

For older people, the benefits of increased contact with friends and family, increased independence, cost savings and access to goods and services are persuasive. Through Age UK's many years of working nationally and locally to engage older people with technology and to support them to use it, we have seen first hand the enjoyment it can bring.

However, there is real risk of the increasing exclusion of the 5.7 million older people who are offline unless the pace of change is managed correctly and widespread access to appropriate support is available to help them develop the necessary skills and confidence to make use of the Internet. The recommendation for BIS to promote the new business opportunities offered by the ageing society is particularly welcome.

There is great scope for innovative partnerships between business and the third sector to expand reach and encourage fit-for-purpose services. Inclusively-designed products and services are essential in persuading older people that transacting online can be more convenient than their current way of engaging, and can provide additional benefits.

Widespread access to appropriate training, to help older people get online, needs to be increased. Affordable on-going support will be essential to broaden the use older people make of online services and to refresh that knowledge in an area where there is a fast pace of technological change.

While marketing and campaigns can be effective at stimulating interest, the role of the trusted intermediary cannot be underestimated. Here established third sector organisations can play a crucial role in encouraging and supporting take-up. Age UK welcomes this report and the work of Race Online 2012 in working to understand and recognise the needs of older people in an increasingly online environment.



Executive Summary

Introduction

Despite older age being the best time of life to be using the Internet¹, more than 5.7 million UK over-65-year-olds have never been online. Internet access should play a key role in successful ageing and help build links across generations and geographies for the UK's older people, yet millions remain excluded from social, financial and developmental opportunities that the vast majority of the UK population now takes for granted.

This report builds on the recommendations in the Manifesto for a Networked Nation² with recommendations for partners in all sectors to ensure all older people can enjoy the benefits of new digital services that 30 million adults in the UK now use on a daily basis³.

A Vision for the UK

- **Nobody retires offline.** Growing old is seen as the best time to use the Internet, due to its disproportionate benefits to counter issues of mobility, health⁴ and loneliness⁵.
- **Services for older people are radically overhauled and improved.** Government (already becoming 'digital by default') and companies put older people's needs at the heart of accessible and usable design.
- **Sufficient investment** to encourage and support all older people to access higher quality digital services, with assisted access (the individual being helped to access services themselves) and intermediated access (the individual having services accessed on their behalf) to digital services available to those that need them.



The case for action

Internet use is becoming increasingly necessary for successful ageing and older people in the UK deserve top quality digital products and services that are usable and accessible. Creating them benefits all age groups, but nobody more so than older people themselves:

Benefits for older people:

- **Mobility barriers:** eased with online shopping, communication, travel-booking, banking and bill-payment.
- **Cost savings:** the average UK household saves £560 per year by shopping and paying bills online (it would cost £3 billion to achieve even half of this benefit with state pension rises).
- **Wellbeing:** closer and more regular contact with friends and family, decreased feelings of isolation and loneliness. Better able to keep up with hobbies, interests and local volunteering opportunities.
- **Independence:** lifelong learning opportunities. More choice and control of healthcare options and personal care budgets.

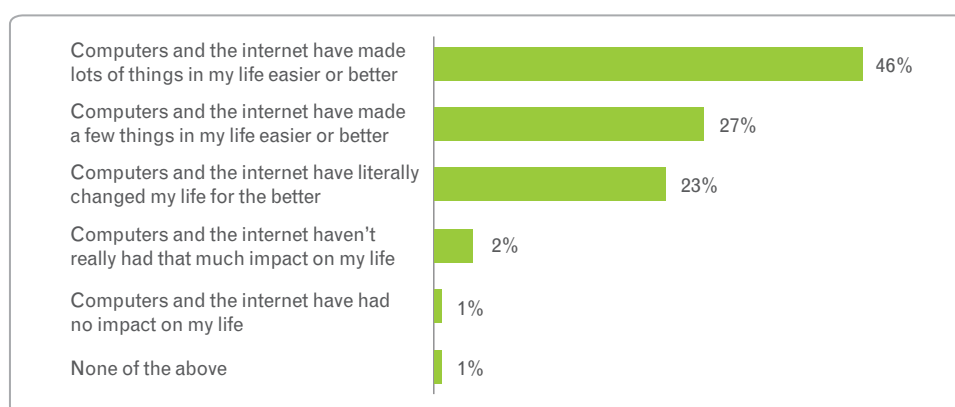


Figure 1: Which of these statements is most true for you? (Q3), Unweighted sample base = 281 (UK online centres panel, Quick poll, November 2010)

Benefits for others:

- **Government:** opportunity to radically overhaul health and social care services for all. If the 5.7 million offline older people move just two monthly contacts with government online it would save an estimated £1 billion per year⁷.
- **British business** can reap extra revenues from more online consumers – an estimated £610 million per year from broadband and £1.6 billion from hardware sales alone⁸.
- **High quality traditional local services** can be retained through new business models, with investment of digital delivery's revenues and savings. Post Offices, local authority one-stop-shops, libraries and UK online centres – all can give trusted local places for direct and assisted access (through a trusted intermediary if required).
- **Carers:** the 6.4 million people providing informal unpaid care (to people of all ages) will have better information and services available to them and more communication options with, where relevant, older relatives.

Strong Foundations

- 4 million of the UK's 40 million Internet users are over 65, busting the myth that you can be 'too old to use the Internet'.
- They spend longer online than any other age group – 42 hours on average per month.
- 1.3 million over 65 year olds have gone online for the first time since 2009.
- People over 65 are the fastest growing user group on Facebook, now with 678,500 users.

The Race Online 2012 campaign has more than 1150 partners, from all sectors, providing wide ranging support:

- **Digital Champions** – Martha Lane Fox recently announced the UK's largest ever cross sector volunteer force – 100,000 local Digital Champion volunteers to inspire and support family, friends and people in their communities to get online, recruited by Race Online 2012 partners including the Post Office, public libraries, Jobcentre Plus, National Institute of Adult Continuing Education, BT, John Lewis, TalkTalk, Comet, Mecca, O2, UK online centres and Age UK.
 - **Cost reduction** – Race Online 2012 has worked with Microsoft and Remploy to bring high quality recycled PCs to the market, costing less than £100 and including connectivity and support.
 - **Face to face support initiatives** – Age UK campaigns iTea & Biscuits and myfriends online week; UK online centres' 3800 venues helped 130,000 people over 65 online last year; Digital Unite's Silver Surfers campaign, in its 10th year, celebrating and encouraging older people's Internet use; Finerday's Adopt A Care Home project, partnering schools with care homes to help residents get online.
 - **Access** – through traditional routes such as libraries and UK online centres and also through Mecca Bingo, Jobcentre Plus and Wetherspoons pubs who are increasingly partnering with others to offer Internet access and/or training.
 - **Inspiration** – BBC's First Click campaign was seen by 30 million people last year, raising awareness of the benefits of being online; a series of powerful films from Macmillan Cancer Support showcase the incredible value of Internet access to many of the people they support.
- Many new devices and technologies are far more user friendly than traditional computers and are making 'being online' easier for older people:
- 20% of new Apple **iPad** owners are aged over 55⁹.
 - 60% of over 65s have a **mobile phone** (but only 5% use them to get online).
 - **Internet connected TV services** such as YouView (launching early 2012) will provide a familiar interface.



Characteristics of the 5.7 million offline older people

The over 65 year old bracket is highly diverse and, while attempts to create segmentation models are a vital part of solutions analysis, general stereotypes are best avoided. Two exacerbating barriers are, however, usually more relevant to older people, and make traction for standard initiatives more difficult to achieve:

- Unfamiliarity with technology – aggravating privacy and security concerns.
- Physical and cognitive impairments – further lowering poor confidence, exaggerating poor skills and requiring extra ongoing support.

Race Online 2012 commissioned Engine to segment the offline older population so commercial partners can better tailor their efforts. Using industry market research (including Experian data) they have defined **three main groups** of non-users among the over-65s (based on household income and attitudes to technology):

- 1) **Traditionalists** (43%) – typically with adequate to high incomes but a relatively negative view of technology and the Internet;
- 2) **Hesitators** (35%) – typically with adequate to moderate incomes and a relatively positive view of technology and the Internet;
- 3) **Highly Supported** (22%) – typically older than the other two groups, with lower incomes and more likely to live in cared-for residential settings.



Recommendations

Getting On is Race Online 2012's 'manifesto for older people in a networked nation'. Race Online 2012 is committing to challenging and working with partners in all sectors on the following recommendations:

1. Recognise and promote new business opportunities in an ageing society with a market of 5.7 million older people who are yet to go online.

More must be done to communicate the benefits for business in engaging with the significant wealth and spending power of many of the older generation. Business opportunities lie in the development and design of inclusive goods and services, and through better appreciation of how to provide good online experiences to older people or those with physical or cognitive impairments.

- i. The Department for Business, Innovation and Skills (BIS) should work with the CBI, Design Council and British Chamber of Commerce to help overcome stereotypes about older people and promote the business benefits of innovating for and serving Britain's ageing population.
- ii. BIS should encourage the British Retail Consortium to work with its members to develop an ageing society strategy to ensure that the needs of older people are met in-store and online.
- iii. Intellect and the British Retail Consortium should work with electronics retailers to improve the retail experience of older people buying computers, peripherals and other digital services, and BIS should ensure that this issue is addressed in the 'future of the high street' report being led by Mary Portas.
- iv. Industry and media partners should join Race Online 2012 and develop specific strategies to communicate the positive benefits of the Internet to 5.7 million potential new online consumers.

2. Radically improve the quality of services for older people and give them the same high quality digital options as all other age groups:

By developing innovative new interfaces and digital services for older people that, for example, exploit the best of new agile web-based technologies:

- i. The new prototype of a single domain for Government – alpha.gov.uk – should embed the needs of older users in the next (beta) stage of its development.
- ii. The new Government 'IT Skunkworks' team should bring older people and service providers together with developers to identify areas where development of innovative new digital services for older people would bring greatest benefit.
- iii. The Department of Work and Pensions (DWP) should commit to making retirement planning and State Pension applications digital by default.
- iv. The Departments of Health and Communities and Local Government (CLG) should launch a fundamental review of current health and social care services for older people to identify where new digital information and services could provide older people with a better quality and choice of those services over which they have more individual control.
- v. The eAccessibility Forum should continue to prioritise work with technology retailers, telecommunications companies and connected digital TV providers to promote the launch of new products and services for older people which are easy to understand, usable and accessible.

By designing digital products and services that are usable by, and accessible to, older people (and therefore easier to use and more accessible for everyone in the UK) with minimal training:

- vi. The eAccessibility Forum should work with Michael Wolff, the Government's Inclusive Design Champion, and other key partners, such as the Design Council and the CBI, to communicate the business case for inclusive design with British business and other service providers.
- vii. Greater prominence and wider support should be given to age-friendly product and service accreditation schemes, such as the 'Age OK' scheme run by Age UK.
- viii. The new Government Digital Service should:
 - a. follow good practice from the Digital TV switchover programme by setting up an expert advisory group on accessible design of digital by default services so that all new digital services are 'accessible by default'.
 - b. where relevant, ensure real user testing with older people before services are launched, and as part of ongoing service development.
 - c. work with the Efficiency and Reform Group procurement team to ensure that procurement procedures and policies for new digital services include standards of accessibility and usability.



3. Invest a proportion of increased revenue and/or efficiency savings from new digital services to inspire, encourage and support older people to benefit from high quality and convenient digital services.

- i. Race Online 2012 partners from all sectors should develop a package of rewards for going online and passing on Internet skills which are specifically targeted at older people.
- ii. IT companies and electronic retailers should continue to develop and introduce affordable 'first time online' packages, including options to optimise packages for older users.
- iii. Internet Service Providers (ISPs) should introduce lower cost 'first time online' connectivity solutions and follow Talk Talk's lead by introducing new offers that allow family members to buy broadband services for older relatives.
- iv. The Government Digital Service should work with key departments, such as DWP, BIS, the Department for Culture Media & Sport (DCMS) and local authorities to develop a national assisted digital strategy which maximises use of existing local community infrastructure – e.g. Post Offices, public libraries, UK online centres, local authority one stop shops, GP practices and Age UK centres – to provide assisted or intermediated access to digital services for those that need it.
- v. The Government Digital Service should ensure that all departments and agencies offering digital by default services have an adequately funded assisted digital strategy that, where relevant, takes account of the needs of older people.
- vi. To address the needs of the 700,000 older people who live in sheltered housing schemes and the further 600,000 older people who live in some form of residential care environment, registered social landlords and care home providers should be encouraged to develop strategies to support residents' use of the Internet.
 - a. DWP/CLG should develop a programme to share business value findings and implementation tool kits from the 'Get Digital' programme with all registered social landlords and care home providers.
 - b. DWP/CLG should continue work with Housing Federations, trade bodies (such as the English Community Care Association), industry partners and delivery agents (such as Digital Unite) to continue and expand the delivery of digital participation in sheltered housing, housing association properties and care homes.
 - c. The Care Quality Commission should include digital participation metrics in its evaluation criteria for supported housing and care home environments.
 - d. The Department of Education should encourage more schools to support Finerday's 'Adopt a Care Home' programme where schoolchildren provide ongoing support to older people in residential care homes.

Race Online 2012 will highlight progress on these recommendations as part of its monthly highlight reports at www.raceonline2012.org.

Introduction

This report asserts a key role for Internet use by older people as part of all strategies to support successful ageing and longer independent living in the UK. The report's purpose is to start a debate on how to support an increasingly ageing society in an increasingly networked nation with recommendations for partners in all sectors. In support of successful ageing and strong links between the generations and geographies in the UK, this report has a vision of a UK where nobody retires offline; where nobody is considered 'too old to use the Internet'; where appreciation of the Internet is not assumed to be beyond those in later life and where access to it is supplied as a standard utility to all, old or young.

The Internet has become vital for full involvement in modern life, and access to it increases happiness, self-confidence and quality of life.

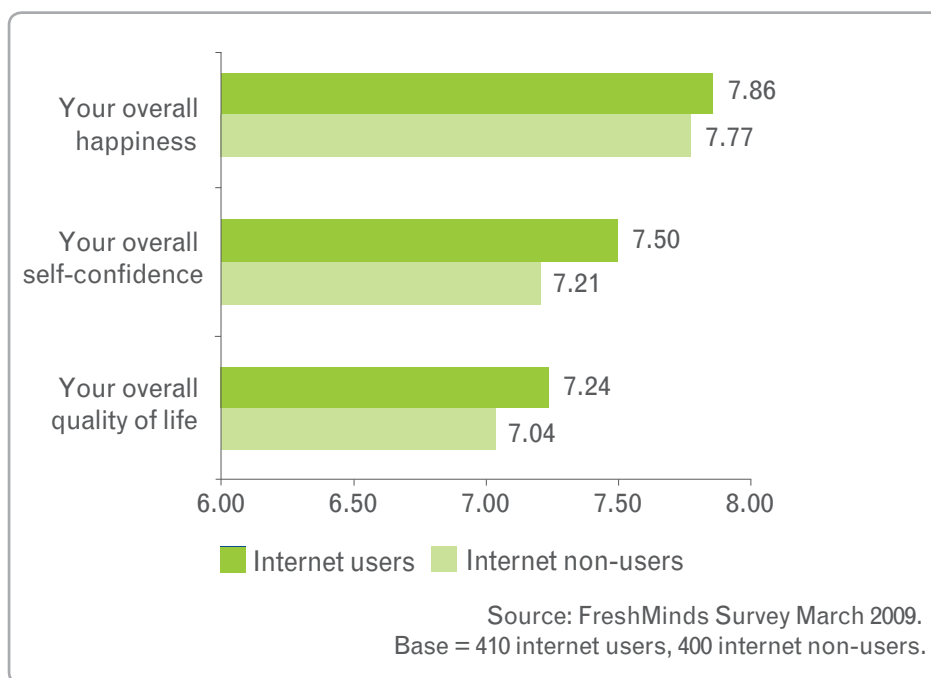


Figure 2: Respondents' perceptions of their happiness, self-confidence and quality of life (score out of 10)¹⁰ (Freshminds Research, UK online centres: Does the Internet improve lives? 2009)

The UK is a world leader in Internet use, with the largest e-commerce market per capita, 40 million adults online (30 million every single day) and 25 million on Facebook users¹¹. So why are 5.7 million older people being left behind while the rest of the UK flourishes online without them?

Over 65s are by far the largest group (65%) among the 8.7 million who remain offline in the UK. This is counter-intuitive – older people specifically have more to gain than anyone by being online. The interaction with friends, family and peer communities, building stronger social and support networks, is especially salient for those with reduced mobility, and whose friends and family have relocated out of easy reach. New digital health and care technologies can also offer a longer, healthier and more independent life.

5.7 million older people being offline is equally nonsensical for government – life expectancy continues to rise alongside pressure upon state services and resources. A digitally connected older population makes fundamentally improved new service provision feasible, with support delivered more directly, rapidly, intelligently, efficiently and cost-effectively.

Digital services offer a huge opportunity to rethink and redesign provision of these, and other services, for all – not just older people. Thinking both 'Internet first' and 'accessible by default', with proper user-testing with a full range of age groups, can create simpler and more efficient user interfaces and back-end functions.

The resultant new digital services can benefit all age groups but have the potential to really level the playing field for older people, enabling more achievable social justice goals and a more civil society.

UK business has striking opportunities to make more of this huge, often wealthy and increasingly consumerist (over the last two decades consumption by Europe's over-50 year olds has risen three times faster than the rest of the population¹²) yet relatively untapped market.

There is no good reason why all older people shouldn't have and enjoy Internet access. Many older people are already seizing the benefits of the Internet, and in increasing numbers. Those aged 65 and over who are online are spending more time there than any other age group.

Public spending cuts, recession, our ageing society and flexible new technology options all provide a strong impetus to fully include older people in a networked UK.

This report draws on insight from many programmes already working to help older people online, such as Age UK's 'iTea and Biscuits', Registered Social Landlords' 'Get Digital', Digital Unite's 'Silver Surfers Days', ACE IT's 'Moose in the Hoose' project and the 816 UK online centres (out of 3,800) that specifically work with older people. It urges future support initiatives to build on their many successes, be properly resourced and to reach out to people within their communities.



Race Online 2012 partners have recruited a network of more than 100,000 Digital Champions (the largest ever cross-sector volunteer force) who must be mobilised to support initiatives right along the process of helping older people online.

Taster sessions and classes help with initial engagement but that must be maintained with flexible and on-going support. Efforts to help older people use the Internet must also respect the value placed in traditional non-digital channels and existing trusted contact points in local communities.

'Over 65' is a very broad and far from homogenous group, and this report does not assume it to be vulnerable and disconnected. A 67 year old, still in work and comfortable with IT, has very different needs to a 92 year old who has never touched a computer. It is fair, however, to acknowledge that 'older age' usually involves major life events; new social roles and relationships; diverse household structures; more time to oneself; new interests and new learning; and physical and mental changes and challenges.



Vision

This report envisages a UK where no one is left behind in a fully networked nation:

- **No one retires offline** and where **growing old is perceived as one of the strongest reasons to get online** because of the disproportionate benefits it brings to individuals at a time when mobility, health¹³ and loneliness¹⁴ are more likely to affect quality of life.
- There is a **radical improvement in the quality of services for older people**, where businesses design fully usable and accessible digital products and services, and Government puts the needs of older people at the heart of the design of all relevant 'digital by default' public services.
- There is adequate **investment to encourage and support older people to access new higher quality digital services** – with provision of assisted or intermediated digital services where necessary – to avoid the creation of two-tier services where many older people only have access to less convenient and more expensive paper based services.



The Case for Action

The arguments for encouraging and supporting all older people to go online are powerful – everyone in the UK will benefit at a time when, for the first time in our history, there are more older people than young people¹⁵.

UK Government is already moving online, enacting a comprehensive 'digital by default' approach to its information and service delivery – Jobseeker's Allowance, student loan and business services are just the first wave of digital by default services and more will follow such as Universal Credit. It used to cost government more than £10 to process a driving license application or a self-assessment tax form. Online, the cost is less than £2¹⁶. A visit to the NHS Choices website costs just 46p, compared to £32 for a visit to a GP and £111 for a visit to A&E.

Local authorities should all have integrated digital service strategies that include commitments to 'digital by default' service delivery, support for community-based Internet access and training, and an approach to service design that puts disadvantaged groups and older people at the heart of the design process.

Local authorities should make best use of national campaigns and partnerships (such as Race Online 2012 and the BBC's First Click) to support local activities to help older people get online (e.g. Go ON Sheffield). Free 'Go ON' marketing materials are available from Race Online 2012 to support local campaigns and partnerships, and are being used by companies and organisations including Microsoft, Google, BBC and Age UK.

Technology has revolutionised the commercial and media sectors, with many products and services now offered 'online only'. Helping even more older people online benefits British business as the remaining offline customers become increasingly hard to reach and service. 5.7 million older people getting online would mean estimated revenues of £610 million per year from broadband sales alone, and a further £1.6 billion in hardware sales¹⁷.

They should not be dismissed as an economic hindrance but welcomed as a commercial boon, with untapped potential, as above. Recent research suggests that, contrary to popular stereotypes, older people are not a drain on the UK economy, but are net contributors to the value of £30 billion a year¹⁸.

With digital technology the 6.4 million people in the UK who provide informal unpaid care to people of all ages, including ageing or disabled relatives, can more easily stay connected and manage complex responsibilities, potentially more easily combining them with work and other commitments.



Government has the opportunity here to improve service personalisation, efficiency and choice at lower costs than with traditional channels, overhauling existing services with radical new models of health and social care for older people online, and moving, where appropriate, to digital services that are 'accessible by default'.

If the 5.7 million offline older people move just two monthly contacts with government online it would save an estimated £1 billion per year. This is especially important as the UK's ageing population continues to boom – in 2007, for the first time in the UK, there were more people over 65 years old than there were under 16 years¹⁹.

Most importantly, older people themselves have the most to gain, empowered and connected as consumers, grandparents, parents and citizens:

- shopping, booking travel, banking and paying bills online to make significant cost savings and overcome mobility problems. It would cost the Government £3 billion a year to increase the State Pension by £5 a week, half of the average household saving from shopping and paying bills online;
- closer and more regular contact with friends and family (particularly those living further afield), and keeping up with hobbies, interests and local volunteering opportunities or support. Ofcom's media literacy research reported that 49% of all Internet users say that being online has increased their contact with distant friends, and 47% with family. 24% say contact with friends who live nearby has also increased. (This at a time when two thirds of women over 75 live alone²⁰);
- a wider range of lifelong learning opportunities and more choice and control of their own health, particularly those with chronic conditions. 67% of NHS Choices users felt better able to manage their health as a result of the information provided; and
- increasing the length of time for independent living where isolation and mobility are significant factors. The Government pays £4.8 billion per year for residential care.



Digital delivery can help protect the real-world contact that is so precious to many older people. **A proportion of efficiency savings should be invested in ensuring that the UK retains and recycles the best of its local service infrastructure**, such as Post Offices, UK online centres, local authority one stop shops and libraries. In these trusted local places and with the support of local Digital Champion volunteers, older people should be able to:

- access new high quality digital services directly;
- be assisted to access digital services; or if needed
- access digital services through a trusted intermediary.

Older people represent the UK's only growing consumer market. For the first time, there are more UK people aged over 65 than under 16, and this is not just a UK phenomenon.

The European Union estimates that the over 65 year old market will grow by 42% from now until 2030 while the 15 to 64 year old market will shrink by 4%.

The picture is similar globally, the United Nations estimates that one third of those in developed regions and one fifth of those in less developed regions will be aged 60 and over by 2050.

This presents an enormous business opportunity for those companies willing to address the needs of older people. As Dick Stroud, MD of 20plus30, summarises:

"In the UK, some of those who are retired and who will retire in the next 5-10 years have a level of wealth and income that is unlikely to be repeated in future generations. They are property owners, have little debt and receive income from investments, pensions and inheritances.

"If you focus on the 15 to 34 market sector you will see virtually no increase in your market [from population growth]. If your customers are in the 50 to 69 category, you will increase your business by over 20 percent without having to increase your market share."



Successful Ageing

“The Internet allows me to manage my affairs in my own time and helps me keep in touch with friends and family, as well as keeping an eye on my local football team, the Seagulls! I am also the Bearer and Honorary Treasurer for the Royal British Legion Witterings & District Branch, and use the computer for that role too.”

Tony Murphy, 69, Age UK Internet Champion 2011 Finalist

Now central to how we think about longer lives, ‘successful ageing’ means much more than avoiding illness and retaining independence. A high quality older age means having a sense of purpose and full inclusion within the community. It means strong social contacts and networks, physical activity and mental stimulation.

The Internet is now key to such levels of successful societal engagement, so being offline puts older people (in particular) at a major disadvantage, not only socially but also in terms of health, as the risks from poor social integration are comparable to those of smoking, high blood pressure and obesity²¹.

Meanwhile younger people’s higher mobility and connectedness levels can leave older people who remain offline feeling isolated and alone. 51% of over 75 year olds live alone and just over 1 million (11%) aged 65 and over say they always or often feel lonely²². Research shows Internet access can counter this, increasing feelings of independence and reducing feelings of loneliness²³. 81% said computer literacy made them feel part of modern society²⁴.

David Cameron recently announced that the Office of National Statistics is to measure wellbeing among the UK’s residents. On the same day, 96% of respondents to a UK online survey said the Internet had improved their life²⁵.

“This is the world that we now live in and as an individual not able to understand or apply these terms I felt like a dinosaur. Before I learned to use a computer and the Internet in particular I relied on the telephone and letters to contact family and friends and purchased items direct from shops, with little comparison of prices, and I used a standard film camera.”

Frederick Briggs, 72, Age UK Joint Internet Champion of the Year 2010



There are some encouraging signs among services from the commercial and charity sectors, with increasing numbers of online services targeted at older people, such as the simplified mail, information and communications provider finerday.com, older social networking site sagazone.co.uk and Age UK's support services. Facebook's popularity among older people is also rising fast with 678,500 over 65 year olds now using the UK website.

In the UK labour market, 823,000 people (8%) are remaining in work beyond the previously defined retirement age of 65²⁶, contributing extensive skills and experience. The Internet is a vital facilitator, not only in finding opportunities, but in then securing them (basic IT skills are essential for 90% of all new jobs) and making them work through new working practices such as home-working.

Demographic ageing is challenging traditional norms of retirement, but the Internet can underpin active retirement with access to information, leisure opportunities, learning, skills and work.

Health & Wellbeing

Internet-based telecare and telehealth devices are gaining increasing prominence as part of the toolkit for managing chronic conditions such as diabetes or congestive heart failure. Digital services can allow people to self-manage and engage with their conditions, share vital signs with clinical staff and learn more about their condition – and most pilot studies are showing considerable cost savings and increased patient engagement.

By providing reassurance they also enable family members providing care and support to remain in paid work.

Navigating the health and social care system or understanding welfare and benefits entitlement can be difficult without the Internet. Those online have simpler access to local authority, department and NHS service information and advice, through their websites.

We are in an era of personalised access to services such as In Control's Shop4Support (www.in-control.org.uk – a social care services market place also providing free information and news about activities, events, and support groups within local areas which can aid independent living). The finerday.com portal is, for example, working with local councils and the Department Of Health to channel local Digital Champions support directly into care homes.

The NHS Choices website is already delivering clear benefits to its users and the taxpayer. A visit to NHS Choices costs just 46p, compared to £32 for a visit to a GP and £111 for a visit to A&E. Over 8 million people view the NHS Choices website each month, with 67% of users stating that they felt better able to manage their health as a result of the information provided.

With 65% of NHS spending going on people over 65, supporting older people to get online and manage their own healthcare would amount to significant savings. Such savings are especially pertinent at a time when, by the 2020s, the number of older people relying on community care services will rise by an estimated 40%²⁷.



"I am so glad that my granddaughter showed me the NHS Choices website. I have diabetes and before I really didn't know anything about it. I have learnt so much now from being able to look things up on the Internet."

Edna Graham, 64

Independence

Many older people are trapped within their homes by declining mobility, lack of transport options, carer duties and/or fear of going out. 3.1 million people in the UK over the age of 65 see a friend, neighbour or family member less than once a week and 1.8 million have that contact less than once a month.

The Internet can offer freedom from the potential loneliness of having to spend a long time indoors, giving access to easy and cheap media and communications, home-delivery retailers and transport information that can reduce the need for costly supported care environments.

The Government faces an annual bill of £4.8 billion for residential care, so the economic case for longer independent living, with its more cost-effective operation, is strong. Policy efforts to bring older people online are therefore increasingly urgent with Internet access now seen as a crucial building block to support that independent living, primarily through facilitation of more efficient telehealth and telecare technologies (for which people are required to be online).

There is also an opportunity for government to design new digital services from scratch based on what older people want and need rather than what is currently delivered. For example, Southwark Circle is providing new models of social contact for older people that supplement and, for some people, replace the need to attend expensive day care centres.

For areas such as adult social care (on which the state spent £9.1 billion in 2008-9²⁸) the Internet should be used and promoted as a highly efficient option for individual older people to make informed decisions about their personal budgets and self-directed care. There are also huge opportunities for care providers and local authorities to use digital technologies to dramatically simplify social care administration and improve standards of care for millions of older people.

Some social care providers have told us that they want to make more use of electronic administration but that resistance is high and paper-based timesheets and care records remain the norm. This is inefficient as savings from administration costs could be used to protect more essential front line care. The Care Quality Commission might play a greater leadership role in supporting local authorities and care providers to make greater use of digital technologies, to simplify administration and improve service quality.

"It's absolutely marvelous. It's given me a great deal of freedom and opened up a new world to me. Aside from online shopping, the Internet even enables me to see my son in Doha and my wee grandson growing up."

Ann Hughes, 66



Strong Foundations

To counter stereotypes and prejudices that assume modern digital technology to be somehow beyond the grasp of older people, it is important to recognise, remember and emphasise their capacity and willingness to learn²⁹:

- More than one million additional over 65 year olds regularly use the Internet in 2011, compared to 2009.
- 60% of over 65 year olds now use a mobile phone (up from 51% in 2007).
- The greatest increase in digital TV ownership between 2007 and 2009 was among over 65 year olds.
- Ofcom research suggests that older people are no more likely than other demographic groups to say that the Internet is difficult to use³⁰.

To some degree older people appear to be very pragmatic with their online activity, suggesting a willingness to have health information, and other similar resources, delivered online.

Alongside this practical approach, data suggest that older people are becoming highly active users of social networking websites. Ofcom data from 2011 Q1 shows an increase of more than 420,000 over 65 year olds using Internet access for social networking over just 12 months³¹, an average of more than 1000 new social networkers per day.

Figures from Facebook say that, as of July 2010, there were 678,500 over 65 year olds using the site in the UK, up from 407,500 in 2009 and just 83,000 in 2008. That's a total increase of 717% over this period.

Delegates at the Go On ND11 (the national digital conference) were introduced to 102 year old Rena Daniels, who recently started using Skype, motivated by seeing relatives use the Internet to keep in touch with each other. She now keeps up to date with her daughters in London and Ipswich, and other family members in Australia.

Despite stereotypes of excessive security concerns and misconceptions, research from Deutsche Bank concludes that older people who are online are just as likely to use Internet banking as other age groups, and that reluctance to engage with the Internet in the first place is their biggest obstacle to online banking adoption³².

In fact, in a number of ways older people's online activity is increasingly similar to that of other age groups. This table compares uses of the Internet for the entire UK Internet population with that of over 65 year old users.



Activity	65+	All UK
Sending and Receiving Email	79%	88%
General Surfing/Browsing the Internet	78%	87%
Purchasing Goods/services/tickets	58%	71%
Finding/Downloading information for personal reasons	51%	58%
Using social networking sites	21%	59%
Playing Games online/Interactively	15%	38%
To find information on health related issues e.g., NHS Direct	27%	36%
Using Local council/Government websites	31%	39%

Source: Ofcom Digital Participation Consortium Tech Tracker Q1 2011. Question: Which, if any, of these do you or members of your household use the Internet for whilst at home? Base: Those with access to the Internet at home.

Quicker, easier, cheaper and more personalised options have made the UK a nation of online shoppers, spending £4.4 billion in April 2010 alone. Personal Finance Research Centre analysis for the International Longevity Centre (ILC-UK) reveals that in 2004/05 around 820,000 UK consumers over 65 years of age made an Internet purchase, and that once older people go online they are as likely as any other group to realise the cost-saving benefits therein.

PricewaterhouseCoopers research for Race Online 2012 estimated that digitally excluded households could save between £270 and £560 a year, depending on their economic circumstances, by shopping and paying bills online³³. For the 5% of pensioner couples and 16% of single pensioners who have no source of income other than the state pension and benefits³⁴, or the 28% of pensioner couples who have less than £1,500 in savings, this saving represents an increase of income of about £10 per week. The UK government would need to spend £3 billion a year to increase the State Pension by even half this amount.



Case Study – Get Digital

About 700,000 (6%) UK older people live in sheltered housing – independent but likely to be from lower socio-economic groups than peers living in their own homes.

The Get Digital programme, delivered by NIACE and Digital Unite, targeted this identifiable population to get online. It was undertaken alongside landlords, housing associations and local community groups, and funded by Department of Work and Pensions and the Department of Communities and Local Government.

The programme provided grants, training and support for the set-up and support of communal IT facilities promoting, delivering and sustaining digital literacy skills for the residents of 195 sheltered housing schemes. Residents, staff and volunteers worked with other local organisations (particularly schools, UK online centres and other voluntary and community sector groups) to develop technology skills and access.

The programme found clear benefits when Internet access is provided in sheltered housing.

For residents:

- reduction in feelings of isolation from community, friends and family
- higher levels of independence and empowerment
- enabled provision of telecare and telehealth services.

For registered social landlords (RSLs):

- easier and cheaper communications to residents and staff
- enhanced marketability of their properties
- greater efficiency in care management.

The programme will share the business case with social landlords to encourage greater provision of Internet access in care homes and sheltered housing.



Inspiration, Encouragement and Support

"Some friends may be frightened or think it's not for them – but I love it. I tell them to have a go. There's so many places to have lessons and the teachers are brilliant. Have a play, you're not gonna break it. You can find out so much, from your aches and pains to writing."

Fay Wall, 84

There is no shortage of initiatives making strong moral and economic cases for extending internet access to all older people, from businesses, local authorities, community groups, charities and registered social landlords. They well understand the motivations and hesitations of older people, and run schemes including Get Connected, Get Digital, myfriends online week, Digital Unite, Silver Surfer's Day, iTea and Biscuits, Reach for IT, and the widespread services of UK online centres.

Such initiatives, however, are too often dislocated and must align, with the strong support of government, so that older people, wherever they are, can get the help, access and support they need, no matter who is providing it. Charities that work with older people should join Race Online 2012 and proactively promote the benefits of the internet, helping people overcome technology fears and overtly signposting them to local training and support.

There should be no 'wrong door' for any older person looking for support to take their first steps online.

Appropriate support is needed at every stage of older people's adoption of digital technology, from initial interest, through taster and training sessions, to ongoing support (as skills deepen) and, if relevant, equipment-purchasing advice.

The UK's largest ever cross sector volunteer force, an army of more than 100,000 local Digital Champions, recruited by Race Online 2012 partners, will play a core role. Peer support from those Champions is particularly important – Volunteering England say that older volunteers have much to offer with skills and life experience that "bring energy and vitality to organisations".³⁵



The pool of potential older volunteers is growing as the number of older people soars. The Government estimates that by 2021 the UK population over 60 will have risen by around 30% to more than 16 million³⁶.

Around one third of the volunteering workforce is over 65 and there's a huge opportunity to harness this group to support their offline peers as Digital Champions.

Funding bodies should recognise the value of technology to charities working with older people and seek to fund the full cost of ICT programmes to help those organisations deliver their services more effectively while helping older people to get online.

First Click, a campaign from the BBC, aimed at over 50s and with colossal reach and scope, is an ideal initiative. This report recommends that Race Online 2012 works closely with agencies (including local authorities, businesses and the BBC) and their activities to ensure joined up campaigning coordinated behind this national campaign, which has already reached out to more than 30 million people in the UK.

Concerns that digital channels will lead to a lack of meaningful interaction for older people must be addressed, and the social benefits of digital connectivity highlighted. Moreover a proportion of the revenues and savings from digitally delivered services should be invested to reinvent and retain the UK's best local service infrastructures, such as Post Offices, UK online centres, local authority one-stop shops and libraries. In these trusted places older people should be able to:

1. access new high quality digital services directly;
2. be assisted to access digital services in a trusted local place; or, if needed
3. access digital services through a trusted intermediary.

This essential evolution also provides an excellent opportunity to reassure away the often overplayed barriers of technology fear, especially with the expanding array of user-friendly interfaces and devices now available.



Case Study – myfriends online week

Age UK's annual 'myfriends online week' campaign helps older people to get hands-on experience of new online social technologies and develop the skills and confidence to use them to combat loneliness and isolation.

A poll by Age UK showed that 63% of older Internet users have more contact with friends and family since being online.

- More than 3500 older people were introduced to the social side of the Internet during 2011's myfriends online week.
- Hundreds of volunteers held nearly 400 training events, showcasing how to email, how to use websites such as Facebook, Twitter and Flickr, and how to use video conferencing tools such as Skype.
- More than 180 organisations took part, including libraries, adult education centres, UK online centres, Shelter Housing schemes, companies and training centres.

Barriers To Internet Use

Existing generic initiatives to inspire, encourage and support new Internet users can be effective for older people – contrary to stereotypes, barriers inhibiting their technology use are vastly similar to those of other age groups. Motivation, access and ability are all significant, as are low benefits awareness, negative perception of cost relative to those benefits, and poor confidence. Ironically, using the Internet is in itself a confidence boost:

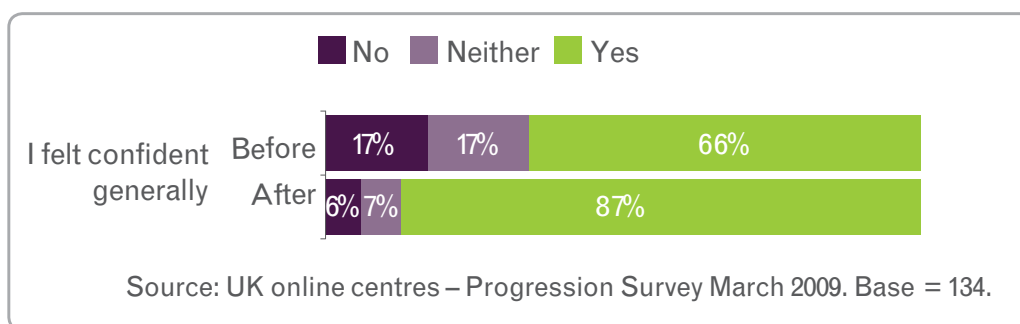


Figure 3: General confidence of UK online centre users before and after their experience at a centre³⁷ (Freshminds Research, UK online centres: Does the Internet improve lives? 2009)



Tackling the barriers of motivation and cost, Race Online 2012 partners have recently recruited 100,000 local digital champions to inspire and support older people to get online, while Microsoft and Remploy have brought high quality recycled PCs to the UK market for under £100 (including connectivity and 30 days telephone support to help get set up).

However, two specific factors that more commonly attend ageing mean initiatives for older people often need to be that bit more persistent, focused and refined to gain meaningful traction:

1. Likely lower familiarity with technology

Older people are less likely to have already used a computer in their professional or social lives, meaning inaccurate perceptions of complexity, risk and value (exaggerated by media coverage of 'identity theft' and 'cyber warfare') often remain unchallenged by first-hand experience.

Fear of technology and demotivation to engage with it are therefore likely to be far higher among older people. This is borne out by the fact that 40% of older people not yet online are actually proactively choosing to be so. 88% of that figure specifically cite 'lack of need' and 'disinterest' as their primary reason³⁸.

Ofcom research³⁹ shows Internet users to be much more likely than non-users to agree that the Internet both makes life easier (87% vs. 34%) and helps save time (85% vs. 37%), proving that inexperience is often loaded with negative misconceptions. If one imagines the reverse, with users reporting poorly on benefits and non-users over-perceiving them, then we would know online to be a place to avoid.

Challenging obstructive myths with the true value and benefits of being online is therefore crucial to boosting confidence so that older people get even as far as giving the Internet a try in the first place.

"I have acquired much more confidence and could not contemplate life without the magic box. I have spent much time trying to convince others of the expanding life it can produce and often share with those that are involved"

Eve Weston, 87, Age UK Internet Champion of the Year 2010 Finalist.

2. Physical and cognitive impairments

Despite living for longer and more healthily than ever before, the vast majority will still experience very normal issues as they age, in particular weakening sight and hearing, but also mobility, dexterity and cognition deterioration. ONS data shows that 48% (4.2 million) of adult non-users of the Internet in the UK are disabled.

The Internet should be the very best tool to address these issues, with its flexible display options, delivered shopping and discreet access from home at the user's own pace being just a few specific benefits.



But technologies not designed with impairments of sight, hearing, cognition and dexterity (likely to attend ageing) in mind, make access particularly difficult for older people. Fiddly buttons, illegible text, fast moving graphics and unintuitive processes, mean this opportunity is being missed.

As part of an overhaul of digital service provision for older people, Government must think not only 'digital by default', but also ensure that digital services are 'accessible by default'. The Government led eAccessibility Forum has a remit to promote this and its members will play an important role in ensuring that new digital public services are accessible to all.



The Right Support

Frequency of access to a computer or training, with ongoing support, are key factors in ensuring older people can overcome the barriers to Internet use.

Studies reveal mild or hardened resistance to the Internet and computers amongst some non-users, proclaiming disinterest which often belies reluctance to admit fear or ignorance. In a world where ownership and use of technology play a big role in how people are viewed, non-ownership and rejection can be a way for some to assert individuality.

The Consumer Participation Panel report, *The Journey to Digital Participation*, makes the important point that for some older people a 'fortress mentality exists'⁴⁰, and any attempts to help them online may entrench that position further.

"Anyone who says they cannot learn to use a computer because of age should not let that be a deterrent. If I can do it, anyone can."

Mary Elliot, 82

Yet accepting self-exclusion at face value risks leaving people isolated by poor information and the misconceptions and unnecessary reservations that it seeds.

Those attempting to support older people past such barriers must recognise these signs and provide a 'way out' where nobody need lose face. One effective method may involve describing the benefits for other people. For example, an older person may feel motivated by knowing that the lives of those caring for them could be easier if they were online.

Many studies illustrate that although technology may initially be viewed as impersonal, foreign and scary, it can soon become an integral part of life when interests and passions turn it into something of personal significance, meaning and value. This has proved true for the telephone (mobile and fixed line), television, radio and cars.

Motivational barriers are, however, difficult to address through communication alone. The evidence from initiatives such as 'Get Digital' is that exposure to computers and the Internet quickly allows people to correct misconceptions, overcome fears and embed their own relevance. Support for older people learning the Internet must be sustained and consistent.

Inadequate, sporadic exposure allows inaccurate perceptions to persist and reform, while extended use builds knowledge and a sense of genuine value – a virtuous circle that will give true longevity to interest and motivation.



Characteristics of offline older people

UK business must consign ageist generalisations about older people to history – opinions such as “they’re too poor”, “they can’t or don’t want to learn new things” and “they’re not going to be round for many more years anyway, so why bother!?”

Broadly segmenting the UK’s older population to strategise engagement is necessary but varies depending on the approach. Engine have analysed Experian’s Mosaic data, which expresses a commercial understanding of barriers and motivators to Internet use⁴¹, and identified 5 key reasons why businesses are foolish to ignore this 5.7 million-strong audience. Olive3, developed by Age Concern Research Services, is an example of alternative segmentation, taking a care-focused approach.

Engine analysis:

- i. 3 million are classified as ABC1s (higher income groups)
- ii. 5.3 million own their own homes outright
- iii. 3.4 million have three or more current or savings accounts which they could be managing online
- iv. 2.4 million take two or more holidays per year, which they could be booking online
- v. 5.7 million people represents a new market for broadband providers worth £610 million per year, and initial hardware to the value of at least £1.6 billion⁴².

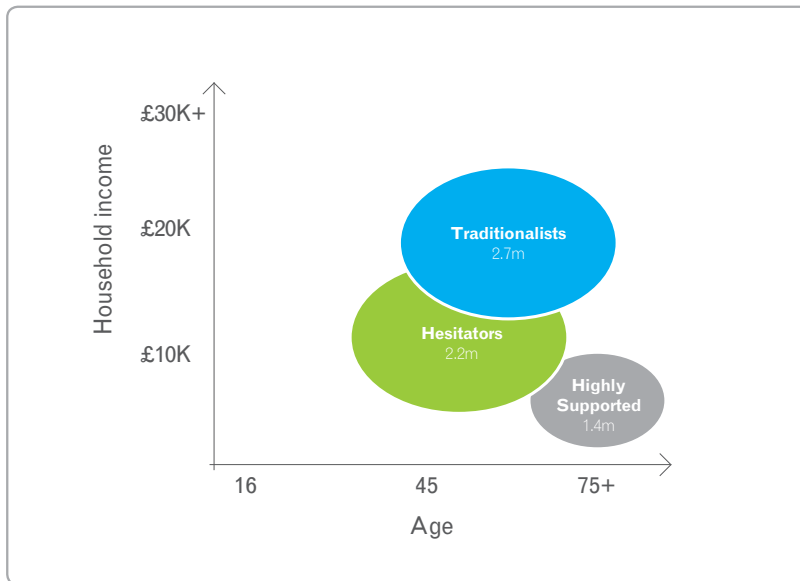
That products and services from all sectors are not designed with this group in mind makes no business sense. To help tailor commercial initiatives for older people, Engine have used industry market research to define three main groups of Internet non-users amongst the over 65s, based on household income and attitudes to technology:

Traditionalists (2.7 million) – typically with adequate to high incomes but a relatively negative view of technology and the Internet;

Hesitators (2.2 million) – typically with adequate to moderate incomes and a relatively positive view of technology and the Internet;

Highly Supported (1.4 million) – typically older than the other two groups, with lower incomes and more likely to live in cared-for residential settings.





Commercial propositions and government or charity initiatives can be specifically suited to these various segments of the over 65 year old population.

The 1.4 million strong **'Highly Supported'** group, for example, are over 75 and will more likely have declining physical and/or cognitive capabilities, requiring supported or intermediated access, at least at first. Just 23% of over 75 year olds are online, while 57% of 65 to 74 year olds are. They are most likely to be living in sheltered housing, so landlords should be centrally involved not only in the support of this group but the benefits of the efficiencies of digital channels. Also, with lower disposable incomes, the Highly Supported are likely to prefer supported or intermediated access, and likely to value those face-to-face options more than, for example, Hesitators.

'Hesitators' are not anti-technology, just reluctant to change. But once they understand the benefits they are quick to adopt. Commercial and not-for-profit support initiatives must focus these people on the benefits that the Internet will bring to them personally, and offer training alongside low-cost and straightforward hardware and connectivity.

The 2.7 million **'Traditionalists'** form the largest segment of over 65 year olds not using the Internet. With higher levels of disposable income and high likelihood that they own their homes outright, they are an appealing audience for many e-commerce brands. They are open to getting online if they thought they needed to, but are currently skeptical as to the benefits. They are also more concerned about security than other groups. Again, focusing on specific and personal benefits, as well as providing purchase, set-up and trouble-shooting support, will encourage this large and valuable group to get online.

"I'd be at a bit of a loss without it. I used to think it was a gimmick, but it isn't. There's lots of benefits I didn't realise were there. It's beautiful."

John Storey, 70



Despite the barriers there are many powerful indications that overcoming them is a highly achievable goal. As well as the detail within the 'Strong Foundations' section, older non-users also display distinct curiosity with computers and the Internet:

- nearly 1 in 6 state interest in sending digital photos by email
- 16% are interested in shopping and finding out about local services, online
- 4 out of 10 older non-users agree that the Internet would make their lives easier or save time⁴³
- 20% of non-users get others to perform tasks for them online⁴⁴

The challenge is to address the barriers while nurturing interest, as detailed above, to foster useful and long-lasting engagement. With strong access (direct or proxy) and sympathetic support, the potential demand becomes clear.

Central conclusions on the needs of strategies supporting older people beyond their demotivation and fear can be drawn:

- Many barriers are motivational; lack of interest, poor perception of need, fear of technology or looking ignorant, and a sense of being too old
- Actual and perceived upfront costs of technology purchase is key
- Introductory initiatives must be backed up by longer term access (e.g. ownership or devices in the home)
- Good access includes using the right device and not being unduly concerned with notions of 'computing', 'ICT skills' or 'technology'.



Design and Accessibility

Issues of access are more complex than simple exposure to or ownership of computers. Usability across the continuum of hardware, software and interfaces is essential to reduce fear factors hindering initial online engagement.

Unfortunately, mass market digital technologies are usually designed with younger audiences foremost in mind, “built by the young to be used by the young, [paying] scant attention to the needs of the older person”.⁴⁵

A Design Council study in 2005 found two thirds of FTSE 100 companies were unaware of the issues facing older users and potential customers, their products and services not adhering to usability and accessibility guidelines⁴⁶, making them frustrating or impossible to use. Indeed nearly 4 in 10 non-users of the Internet agree with the statement that the Internet as a whole is difficult to use⁴⁷.

A significant commercial opportunity is being missed as the net incomes of pensioner households rose by 25% between 1998/9 and 2007/8 (compared to real earnings growth of 11%)⁴⁸.

Government has set up the eAccessibility Forum to work with Industry and the third sector, with an action plan, launched last year, to look at opportunities and issues around accessibility for older and disabled people.

New Opportunities

The paradigm of traditional home computing (mouse + keyboard + desktop machine) is giving way to far more user friendly devices. Voice-controlled computing, for example, is taking hold, with 25% of all searches on Android phones now made by voice.

The recent advent of touch-screen devices, smartphones and tablet computers (such as Apple's iPad), alongside single function application (or 'apps'), is redefining 'connectivity' and 'being online'.

Online experiences are becoming simpler, dramatically improving usability and increasing adoption. Smartphones and tablet devices are selling strongly in the over 50s segment, with one report estimating that 18% of iPhones are purchased by over 55 year olds⁴⁹. YouGov figures also show a strong older market for Apple's iPad, with 20% of new owners aged over 55⁵⁰.

Mobile phone usage is now widespread among older people, although accessing the Internet with those phones remains rare – just 5% of over 65 year olds do so, compared to 42% for 25 to 34 year olds.



New computer games platforms and the television (an almost universally owned and nearly 100% digital) offer alternative means of helping older people to be online. Organisations like Looking Local (local government on Internet connected TV services and mobile phones) have responded to this and are delivering their front line public services online via TV and mobile phones.

Another Looking Local project, T-Seniority, achieved positive results delivering an array of services within care homes through the Nintendo Wii games platform: 73% said the service made their life easier and more autonomous; 75% became more confident with new technologies.

The evidence is very much that framing online participation alongside traditional computing is the wrong approach. We must ensure that we work with older people 'where they are' and within the full range of ways to access the Internet, talking less of 'computing' and technology, and more of benefits, society and inclusion.

The Recommendations from this report are listed in full from page 7.



Acknowledgments

In compiling this report we have drawn on data from a range of government funded bodies including Ofcom (Media Literacy and Digital Participation Metrics), Consumer Participation Panel, ONS, and other publicly available research. We have also drawn on insight derived from market research conducted by Race Online 2012 partners – particular thanks to Engine for their work on the segmentation model, and TalkTalk for their willingness to share research materials. Older people's organisations have also provided key inputs, notably Age UK, Carers UK, ILC-UK, Anchor Housing and Digital Unite.

Finally, our thanks to Intel for seconding Simon Roberts to Race Online 2012 so that he could produce the first drafts of this report.



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