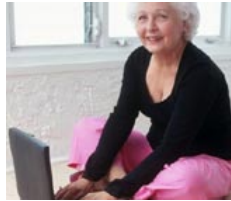




Web 2011



Scenarios for Older Adults Online

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October 2005

Why 2011? It's the year that the first of 77 million Baby Boomers turn 65. And it's also five years away. What might the Internet be like then?

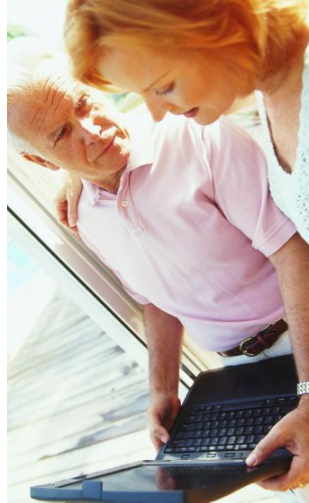
More importantly, what do these two converging trends suggest for our futures? This presentation will share a little about what AARP is doing to explore this topic.



No longer just for nerds...

“The Web has become the ‘**new normal**’ in the American way of life; those who don’t go online constitute an ever-shrinking minority.”

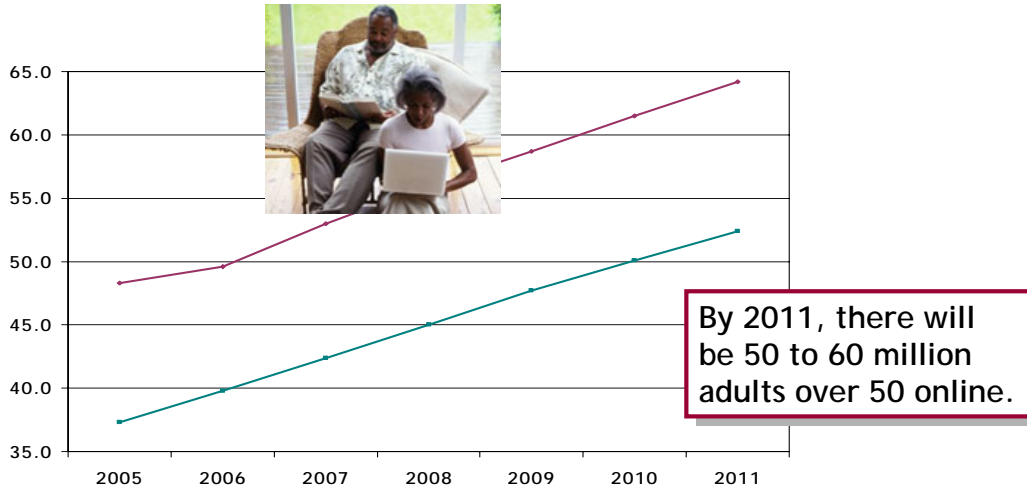
— *Pew Internet & American Life*



Over the years, there’s a belief that older adults don’t go online or prefer print. This may have been true, but it’s rapidly changing, and as the Boomers grow into the AARP demographic, the Internet and Web won’t be an option, it will be the first choice.



Older, wiser, and wired!



Here are two possible forecasts for the market of 50+ adults online. The optimistic forecast uses current data from the USC Annenberg Center for the Digital Future; the less optimistic forecast uses current data from Pew Internet.

Which ever stat you choose, the implication is clear: this is an important market, and reaching them online will be essential.



Web 2011

- ❖ The Internet plays an increasingly important role in people's lives, yet there are a number of uncertainties for the future:
 - Future developments in internet technology, accessibility, and usability;
 - Implications of mobility and convergence;
 - Changes in consumer lifestyles, values and activities.
- ❖ **Web 2011** is meant to explore these issues.

Why did AARP take on the Web 2011 project?

Because we know that it is not sufficient to just respond to changes with the Internet; at some point, we'll need to be prepared to proactively prepare for major increases in number of customers as well as their increased expectations.

We chose **scenario planning**, since it allows us to consider several possible futures that might result from uncertainties in the environment.



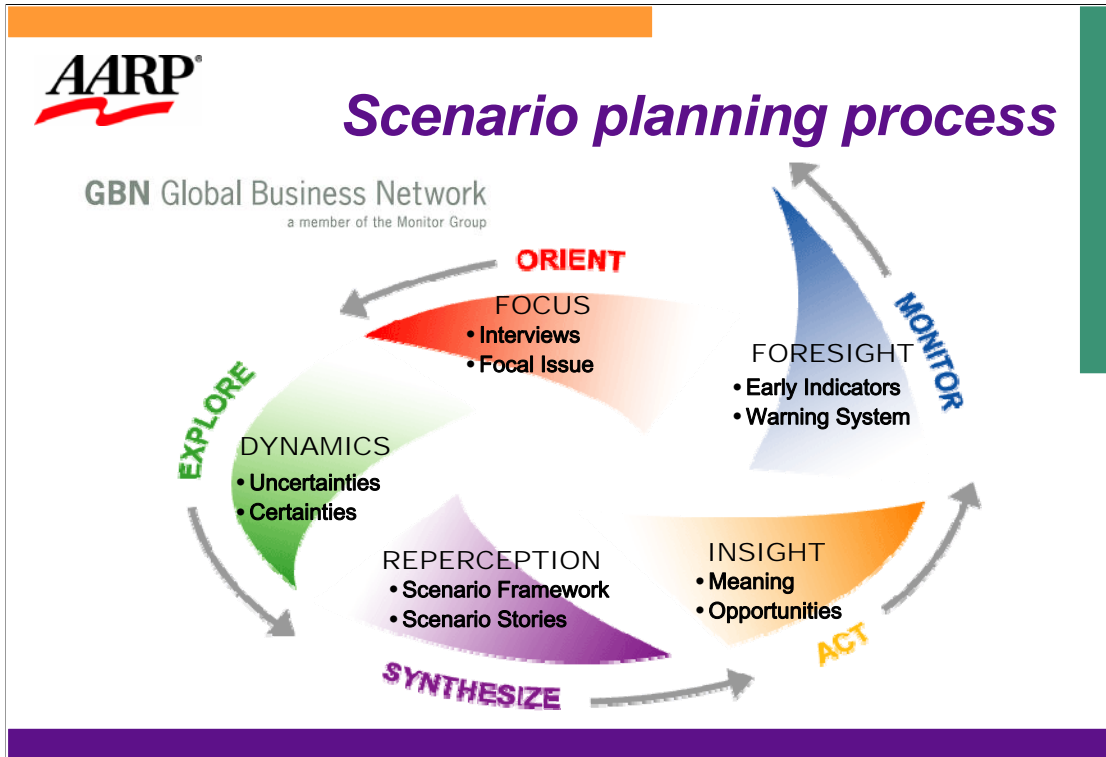
Scenarios: stories, not predictions

“ Scenarios are stories. They are works of art, rather than scientific analyses. [Their reliability] is less important than the types of conversations and decisions they spark.”

—Arie de Geus, The Living Company

One important point: our scenarios aren't predictions. These are the stories that a group of 30 people came up with after sitting in a hotel room for two days. A different group of people would likely have come up with very different scenarios.

The value here is in being able to have compelling discussions about the future rather than the normal day-to-day details of business.



Here's the process we followed. Earlier this year, Global Business Network*, our facilitator, began the process with interviews and discussions with AARP about how to frame the discussion.

In workshop one (in June), AARP staff and a number of thought leaders got together to explore the relevant uncertainties and create a scenario framework. In a later meeting in July, AARP staff worked with GBN to flesh out scenario implications.

From there, the plan is to explore the implications of the scenarios and begin to consider their use in our own strategic planning.

*For more on GBN, see <http://www.gbn.com>



We had a stellar participant list. Approximately 15 staff from AARP and AARP Services, as did thought leaders from organizations like the above.



The question

- What's life like in 2011?
- What's the internet like in 2011?

❖ **What will the role of the internet be in people's lives in 2011?**

- What's life like for people 50+ in 2011?
- What's life like on the internet for people 50+ in 2011?

- How will people 50+ use the internet in 2011?
- What would the internet look like in 2011 with strong 50+ influence?

The first trick: focusing the group on the relevant questions. Given its focus on adults 50+, we naturally are concerned about the implications for older adults. But first, we really do need to look at other questions, such as what's the internet like in 2011?



Initial thoughts

• I'd be surprised, in 2011, if the Internet were

- STILL TIED TO DESKS
- JUST A COMMUNICATION TOOL
- DIFFICULT WITH POWER TO INTERFERE
- RESTRICTED
- USED UNIVERSALLY
- FIXED / STATIONARY
- 10% DIALUP
- AS WE THINK IT WILL BE
- STATIC
- STILL ABOUT PAGES
- A PAY-FOR-CONTENT MODEL
- VISIBLE
- TRENDY

• ABLE TO TRANSFORM US A BIT

- STILL DEPENDENT ON SPINUS / PROVIDERS
- STILL OPEN
- TRULY UNIVERSAL
- IN 100% OF HOMES
- LESS PERSONALLY-DRIVEN
- SIMPLE
- PREDOMINANTLY IN ENGLISH
- VIEWED AS A SERIES OF PAGES
- MORE VISIBLY SECURE
- UNIVERSALLY AVAILABLE
- STILL OPEN (REGULATION -)
- STILL ONE THING
- THE SAME
- ONLY ACCESS THROUGH SCREEN
- STILL IT FUSES

• I'd be surprised, in 2011, if the Internet were not

- more gray
- in 90% of members' homes
- still "The Internet"
- like the electrical grid - a utility
- subversive
- secure but not necessarily trustable
- still "digital divide land"
- more about services, rather than info
- a universal platform
- more secure
- simpler
- consolidated ... moving towards standardization
- not more interactive
- easy to search
- this [?] areas (figured out the last night)
- illegal is
- still increased geometrically
- access that public providers
- dominated by Asian users
- safe or secure
- under much more surveillance by govt.
- hooked up to TV set screens
- more legislation (spam)
- relatively free
- more fixed
- much more important for business marketing
- with me of all times
- still frustrating to navigate
- much more mandated
- PERSASIVE

Participants were asked to fill in the blanks for two questions: I'd be surprised, in 2011, if the Internet were (blank) as well as were not (blank).

Sample answers: I'd be surprised, in 2011, if the Internet were:

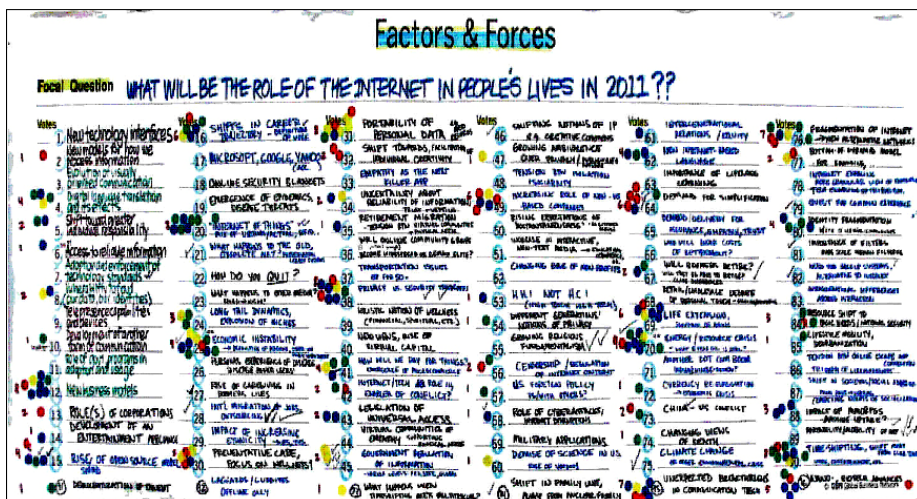
- still tied to desks
- still about pages
- trendy
- still open
- predominantly in English

Sample answers: I'd be surprised, in 2011, if the Internet were **not**:

- like the electrical grid – a utility
- simpler
- safe or secure
- dominated by Asian users



Factors and forces

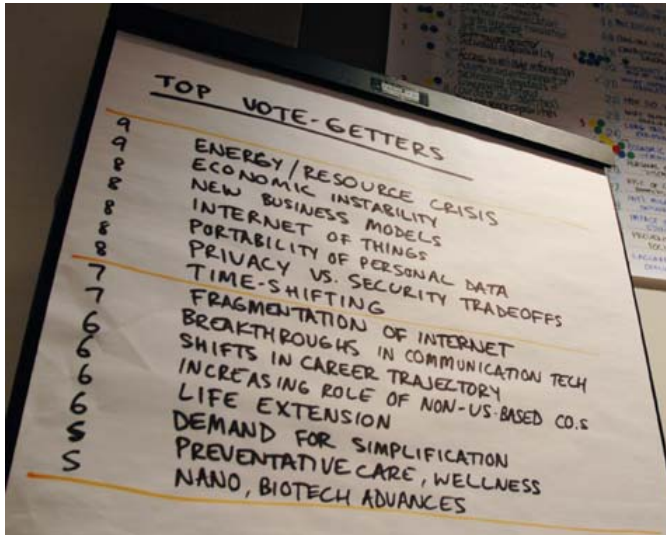


Our group identified a wide range of uncertainties that could have a strong impact on the internet over the next six years. The next slides show how we came up with the major factors and forces.



Science fiction writer Bruce Sterling and AARP staff vote for their critical uncertainties.

If you wondered about the dots on the previous slide, they represented votes. Each of our 30 workshop participant chose 7 uncertainties that they thought were most important. Checks were meant for items that were important, but viewed as relatively certain (for example, security and privacy issues).



Our list of
uncertainties
by votes

Here are the top vote-getters from the list. As you can see, many are pretty solid:

- energy/resource crisis
- economic instability
- new business models
- portability of personal data (health especially)
- privacy vs security



Our draft scenarios

Four teams select two pairs of uncertainties, then the entire group finds the common themes.

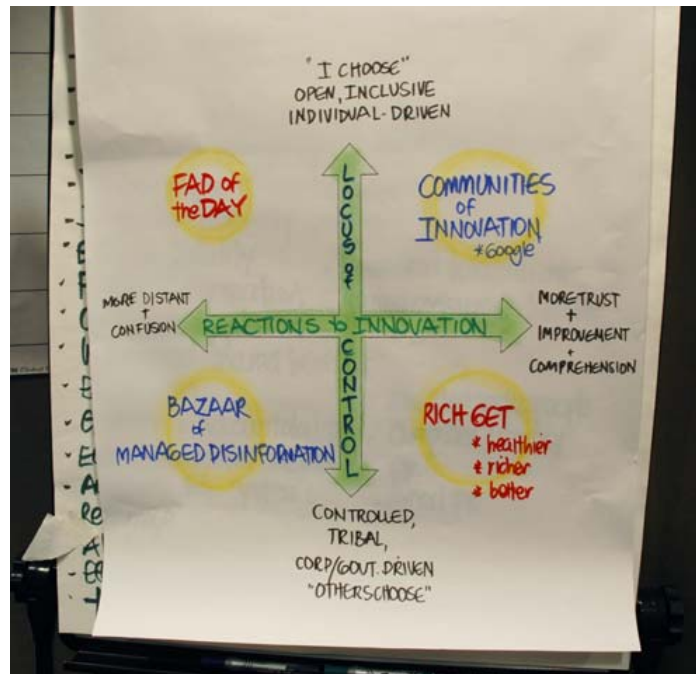


From this list, we came up with clusters of uncertainties that could be expressed as a continuum. Four teams picked two of these continuums and drafted a scenario framework.

Erik Smith, of GBN, then facilitated a discussion to consolidate these into one single framework.



First pass of our scenarios



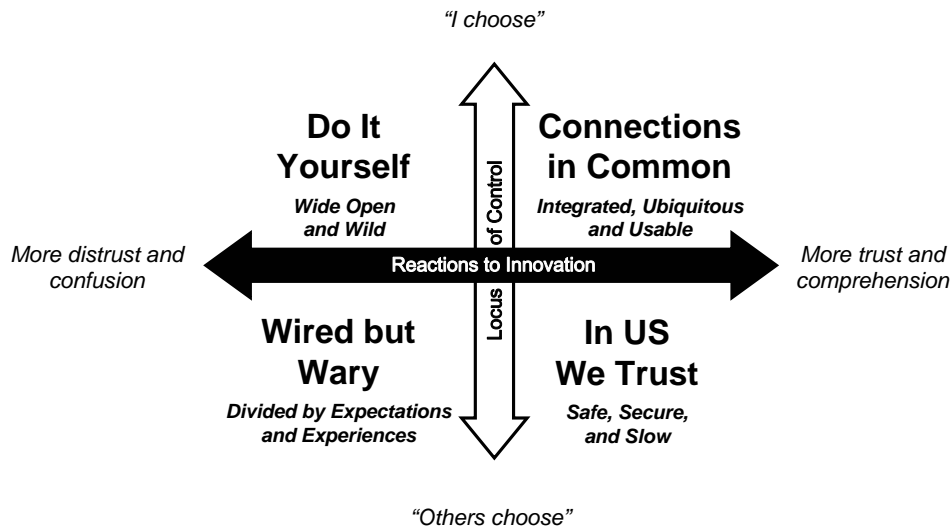
Here's the first pass the group came up with. The two uncertainties they chose were the locus of control (is there individual choice or is choice controlled by some other group whether government or corporate).

The other axis was called reaction to innovation, but it might as easily been labeled reaction to change. On one side there is more trust (which leads to more use) and on the other, there's distrust and confusion.

In the first pass, you can see how the teams had viewed each quadrant.



Our revised scenarios



However, in pass two, the framework was revised.

As we look at each of the scenarios, keep in mind that more than one quadrant may apply, especially when you consider different sectors (e.g., health versus entertainment).



Scenario enhancements



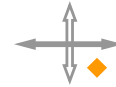
Ben Shneiderman (University of Maryland) and *Joystick Nation* author JC Herz work with AARP Oregon State Director Jerry Cohen on a scenario.

The next step involved dividing the group into four, so that each team could develop an enhanced scenario for each quadrant and then present it to the group.

The scenarios follow.

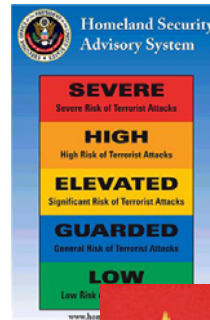


In US We Trust



Seen as:

- Security concerns and fear of terrorism, especially online
- Love/hate relationship with/to future economic powers like India and China
- Government-driven economic and cultural consolidation



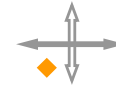
Lack of choice, but high trust

In this world, the internet is likely dominated by a few large organizations who control both customer access and innovation. The online world will be safe and secure, yet also rather “slow.”

This is a world that AARP’s traditional members are, as a group, more naturally comfortable. Not perhaps as true for the Boomers. But older adults appreciate the stability.

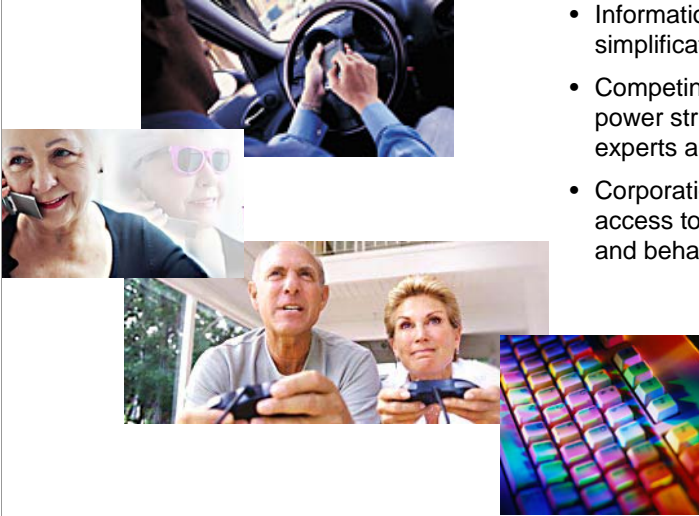


Wired but Wary



Seen as:

- Information overload: thirst for filtering, simplification, guidance
- Competing alliances of monopoly-like power structures, each with their own experts and suggestions
- Corporations support members to gain access to their personal preferences and behavior data



Lack of choice, lack of trust

In this environment, the Internet fragments into a series of very different online environments that vary in their expectations and experiences.

This may increase the need for trusted agents to help the individual. Older adults are more likely to stick with what they know rather than experiment.



Seen as:

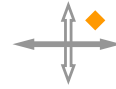
- People on their own
- Proliferation of cyber-crime
- Gurus gain influence as leaders
- Churn in technology, fast turn-over of gadgets, many knock-offs, etc.

Individual choice, but lack of trust

Not a great place for the average older adult: it's like the Wild, Wild, West. The early adopters are happy here, but many older adults will find it too risky. Thus they are more likely to avoid the Internet except for known items of high value (like email).



Connections in Common



Seen as:

- Open Source moves beyond software
- Simpler, smarter and more intuitive interface and access
- Generally escalating prosperity
- Greater emphasis on education, particularly lifelong learning



Individual choice, high trust

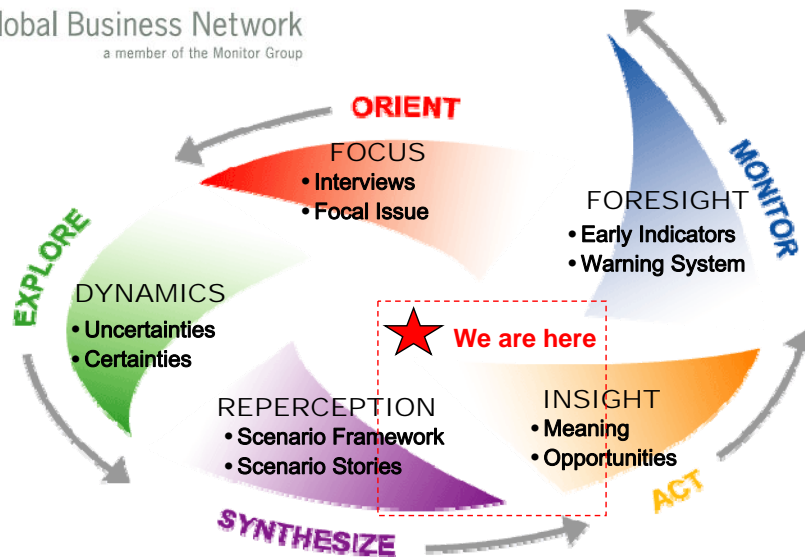
In this environment, the internet provides information, support and entertainment that is innovative, safe, secure and – above all, manageable.

In particular, we see this as a world that really supports intergenerational communication between older adults and their families.



GBN Global Business Network
a member of the Monitor Group

A work in progress



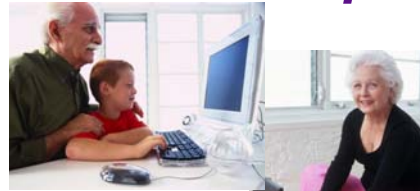
A quick reminder. **These scenarios are stories, not predictions.**

At this point, AARP is still working on these scenarios and their implications. But we're happy to be back at the second Aging by Design, and wanted to share what we have so far.



Next steps

- ❖ Flesh out the scenarios, add stories to make them more real.
- ❖ Bring others together in 2006 for a Web 2011 conference.
- ❖ We'll be sharing more on our Older Wiser Wired site at aarp.org/olderwiserwired



We still have work to do to refine the scenarios. This is just a sneak peak. Ultimately, AARP will want to explore the implications for its own strategic planning purposes.

But we're also eager for other organizations to consider the implications of Web 2011 for their own businesses. So we're planning a larger conference on the subject in late 2006 (more later).

And we'll continue to add to the subject on our site.