



2019 TECH AND THE 50+ SURVEY

January 2019

AARP[®]
Real Possibilities

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EXECUTIVE SUMMARY

Executive summary

The 50+ represent a strong and growing base for technology products.

- 115M strong and growing at the fastest rate, the 50+ will swell in ranks to 132M by 2030 and are projected to spend \$84B annually at current spending levels on tech products for themselves. While women spend more on tech overall than men (\$737 vs. \$529), men are more likely than women to make high-ticket tech purchases (spent \$500+ on tech: men: 28%, women:22%).

Mainstream technology remains strong and large.

- Computer penetration is nearly universal (91%) for the 50+.
- Smartphone penetration among the 50-64yr olds stands at 83%, at parity with the overall adoption rates.
- 94% use technology to stay connected to friends and loved ones. Women (96%) are more likely to say they use tech to stay connected than men (92%).

Source: Spring 2018 Global Attitudes Survey, Pew Research; Census Bureau.

Executive summary (cont.)

There are emerging lanes of opportunity for tech products that make their lives easier or more enriched.

- Over 58M 50+ are interested in such technologies.
- Advanced driver assistance technologies are viewed as important (73%). Currently, 24% own a vehicle with some or all of the advanced features such as automatic parking, emergency braking, lane change detection, and collision avoidance with future purchase interest strong at 46%.
- Smart TVs have a current penetration of 49% with another 9M+ planning to purchase one in the next year.
- Home assistants (i.e., Amazon Alexa or Google Home) have grown significantly in adoption rates since 2017, with nearly one-in-seven owning a device.
- Albeit small, virtual reality technology is increasing in use (13%, +4 pct points vs. year-ago).
- In addition, tech is a means to pursue lifelong learning, with nearly one-fourth (23%) currently taking online classes for certificates or degrees and how-to-tutorials.

Educating this audience on security and privacy protocols and practices is important for future adoption and expanded use of today's technology.

- The 50+ do not place much trust in institutions to keep their personal data secure, with fewer than a quarter trusting online retailers, the federal government, and telecom service providers, to name a few.
- Confidence in their online safety is low (19%), however, not all are following basic safe tech protocols.

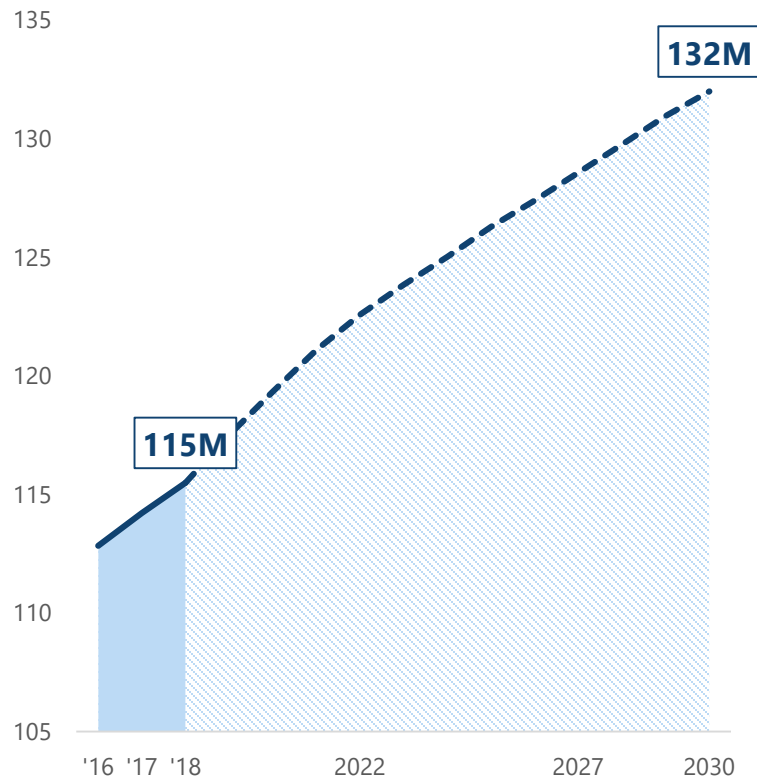
Source: Spring 2018 Global Attitudes Survey, Pew Research; Census Bureau.



TECH OWNERSHIP

Adults 50+ represent a strong and growing base for technology products with the power to spend

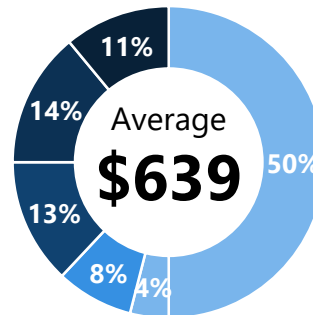
Population of Adults 50+ In millions (projected)



Source: US Census and AARP. Population estimates calculated by AARP.

Tech Spend in 2018

■ Under \$50
 ■ \$51-\$100
 ■ \$101-\$250
■ \$251-\$500
 ■ \$501-\$1000
 ■ Over \$1000



* represents a statistically significant difference between segments at the 95% confidence level.

Base: Total Answering (n=1,475).

Q.NewTech18. Thinking about all of the different tech items you currently own and use, approximately how much did you spend purchasing such items in the past 12 months (November 2017-October 2018)?

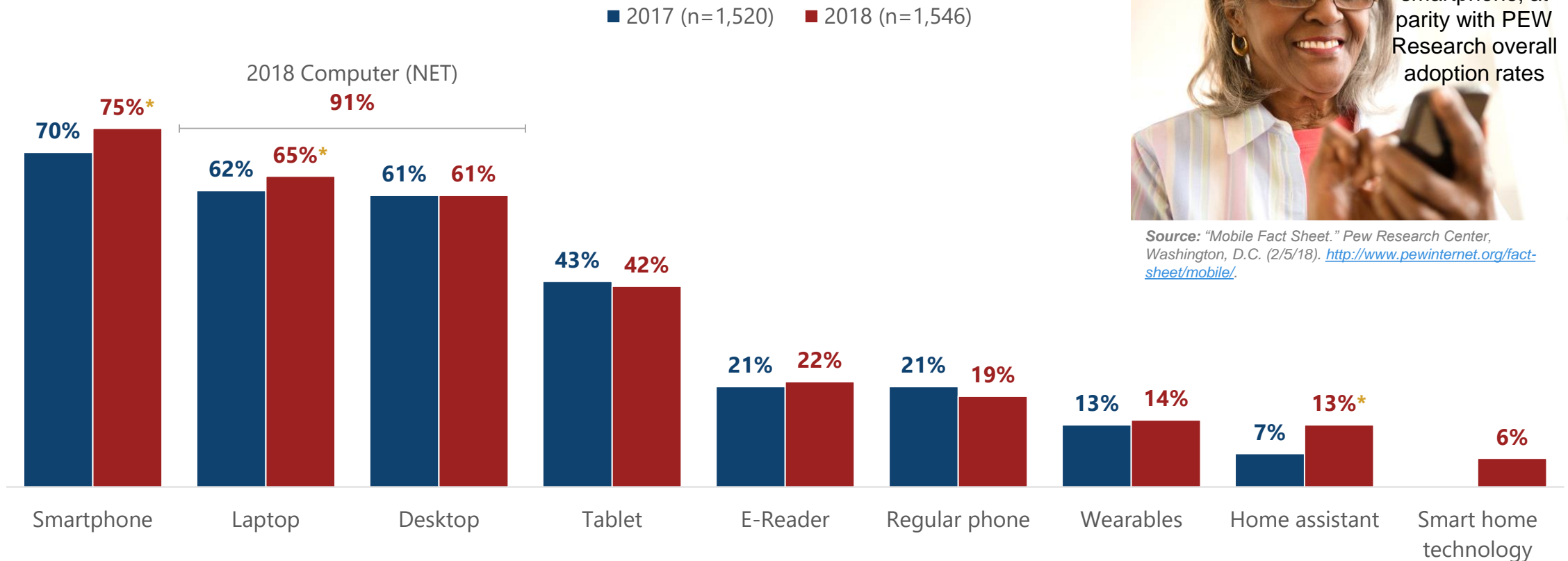
50+ Tech Spend in 2030 Projected based on 2018 average spend



Projected spend calculation: 132M X \$639 yearly spend.

Mainstream technology usage remains strong and large with smartphone adoption in the lead

Device Adoption Among Adults 50+



* represents a statistically significant difference between years at the 95% confidence level.

Base: Total Respondents. Q.Tech1 Which of the following items do you have?



HOW TECH ENRICHES LIVES

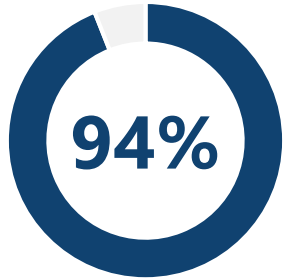
Adults 50+ have embraced technology to make life easier

Top Tech Activities Regardless of Device



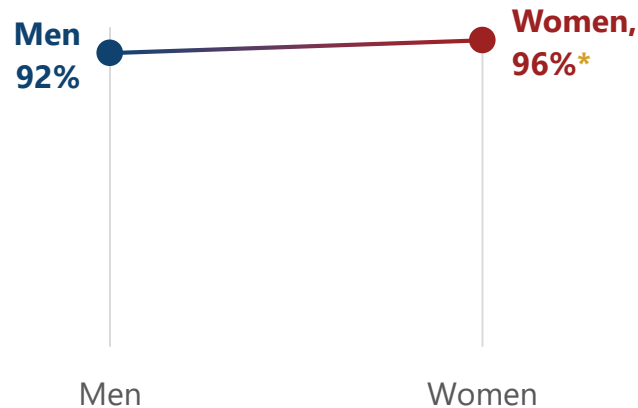
*Base: Those who own a desktop or laptop, tablet, or smartphone (NET)
Q.NEWTech2 Have you used your device to do any of the following activities?*

Technology is used daily to stay connected to friends and loved ones



say they use technology to stay connected to friends and loved ones, up from 91% in 2017

Use of Technology to Stay Connected
Comparison Between Men and Women

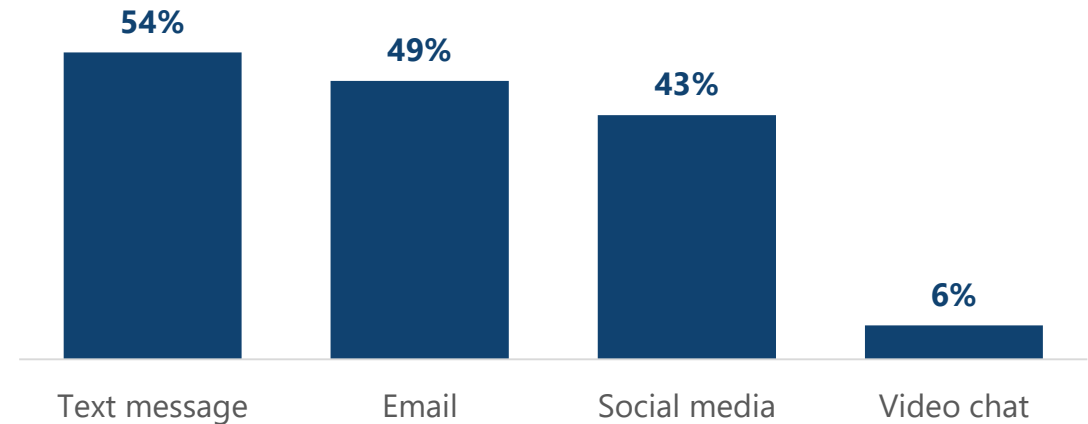


* represents a statistically significant difference between segments at the 95% confidence level.

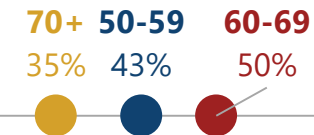
Base: Those who own a desktop, laptop, tablet or smartphone (n=1,542)

Q. NEWQ1 Do you use technology like cell phones, computers, and the Internet to stay connected and in touch with family and friends?

Technology Used Daily to Connect
Among those using technology to stay connected



Daily Social Media Use

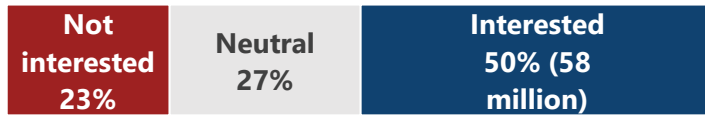


Base: Those who use technology to stay connected (n=1,444)

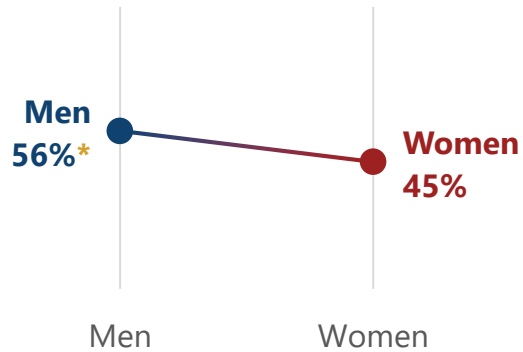
Q. NEWQ2 How often do you use each of the following to communicate with and stay connected to friends and family?

The 50+ have a strong and growing interest in new technology and use technology to learn and grow

Interest in New Technology



Interest in New Technology Comparison Between Men and Women



* represents a statistically significant difference between segments at the 95% confidence level.

Base: Total Answering (n=1,536)

Q. NEWTech13. There are several different types of technology designed to make your life easier or more enriched. To what degree are you interested in learning about today's new technology?

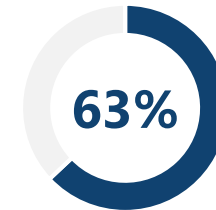
Tech of Growing Interest

Driver assistance vehicle technology	73%	Agree advancements are important
	24%	Have in current vehicle
	46%	Intend to get with next purchase
Smart TVs	49%	Currently own
	8%	Intend to buy next year
	=	9+ million new purchasers
Home assistants	7%	Ownership in 2017
	13%	Ownership in 2018
	=	6 percentage point increase
Virtual reality	9%	Usage in 2017
	13%	Usage in 2018
	=	4 percentage point increase

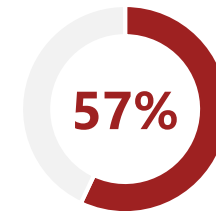
Base: Total Respondents (n=1,546)

References Survey Questions: Tech8, 11, 12, 15, 16, 17

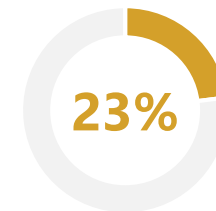
Entertain and Educate



Play games



Watch videos or shows



Take online courses for certificates or degrees and how-to videos

Base: Those who own a desktop or laptop, tablet, or smartphone (NET)

Q. NEWTech2. Have you used your device to do any of the following activities?

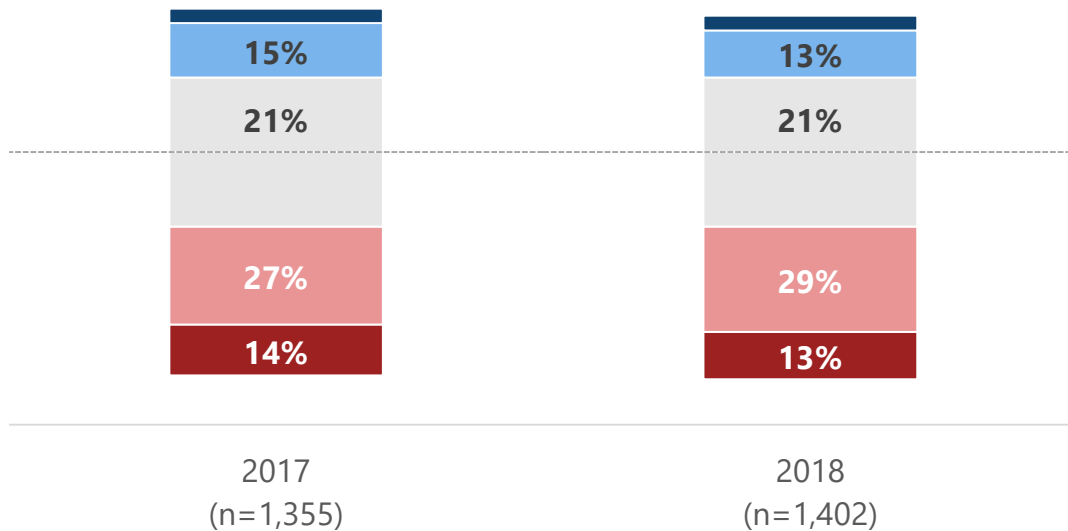


ONLINE SECURITY

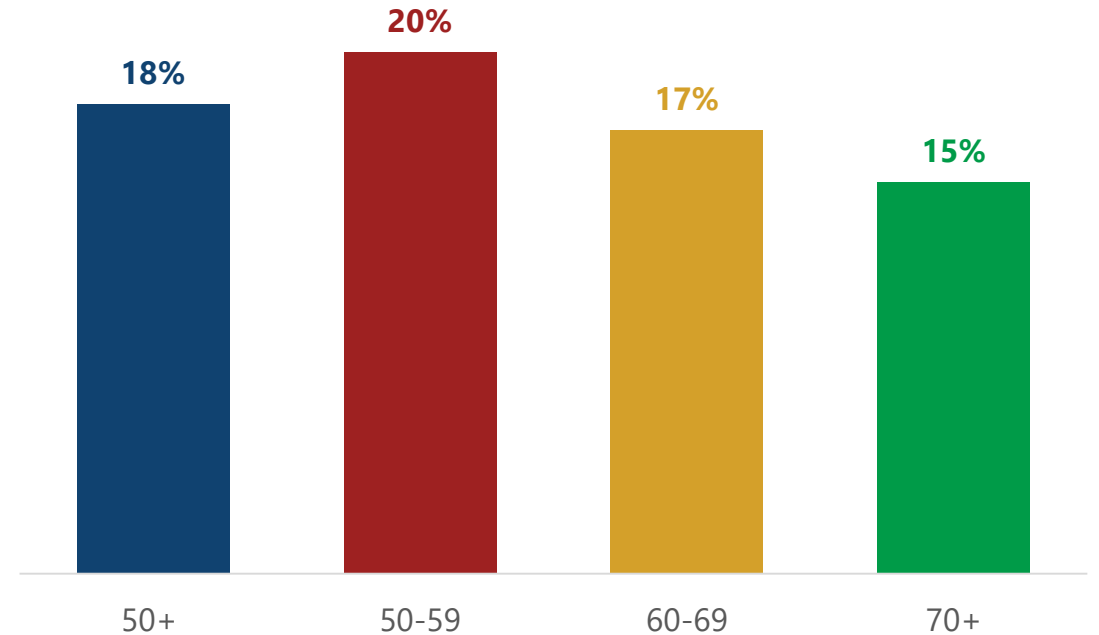
Confidence in their online safety remains low

Confidence in Online Privacy
Adults 50+

■ Not at all confident
 ■ Not very confident
 ■ Somewhat confident
■ Very confident
 ■ Extremely confident



Confidence in Online Privacy by Age
Percent very or extremely confident



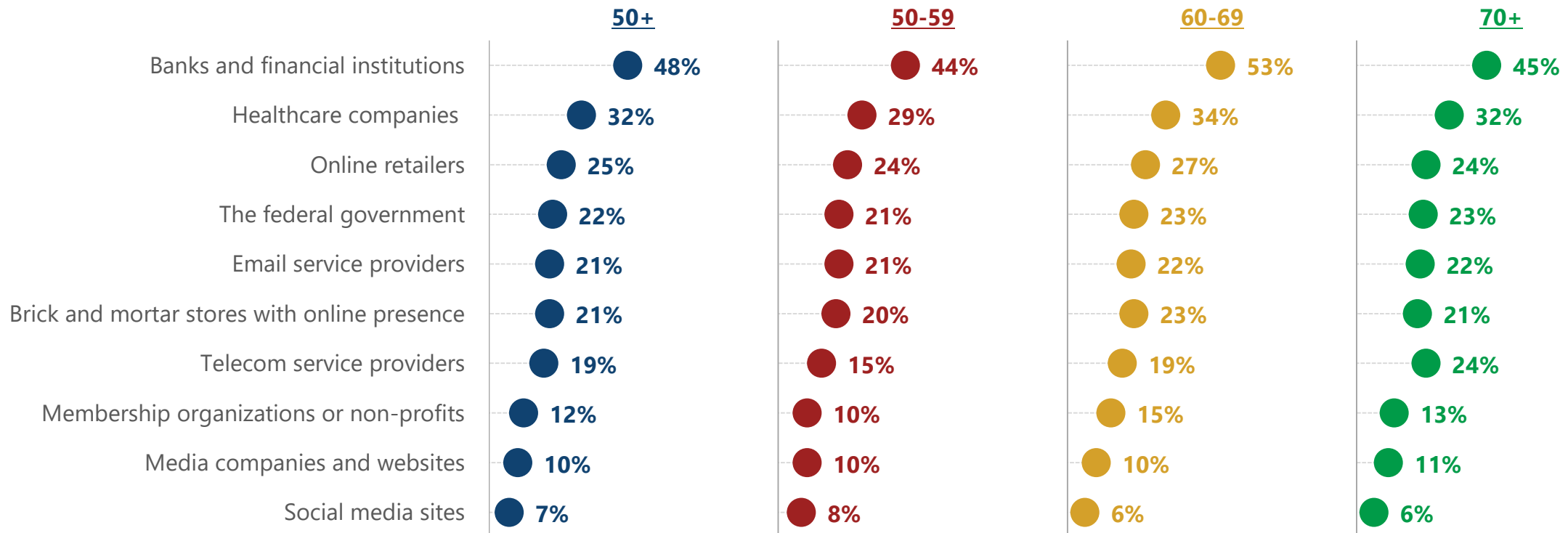
Base: Those who own at least one device.

Q.TECH4. How confident are you that the things you do online when you are using a wireless device such as a laptop, Smartphone, or iPad, are private and will not be used or seen by others without your permission?

Adults 50+ do not trust institutions to keep their personal data safe and secure

Trust in Businesses to Keep Personal Data Secure Online

Percent indicating 4 or 5 on a 5 point scale (higher indicates more trust)



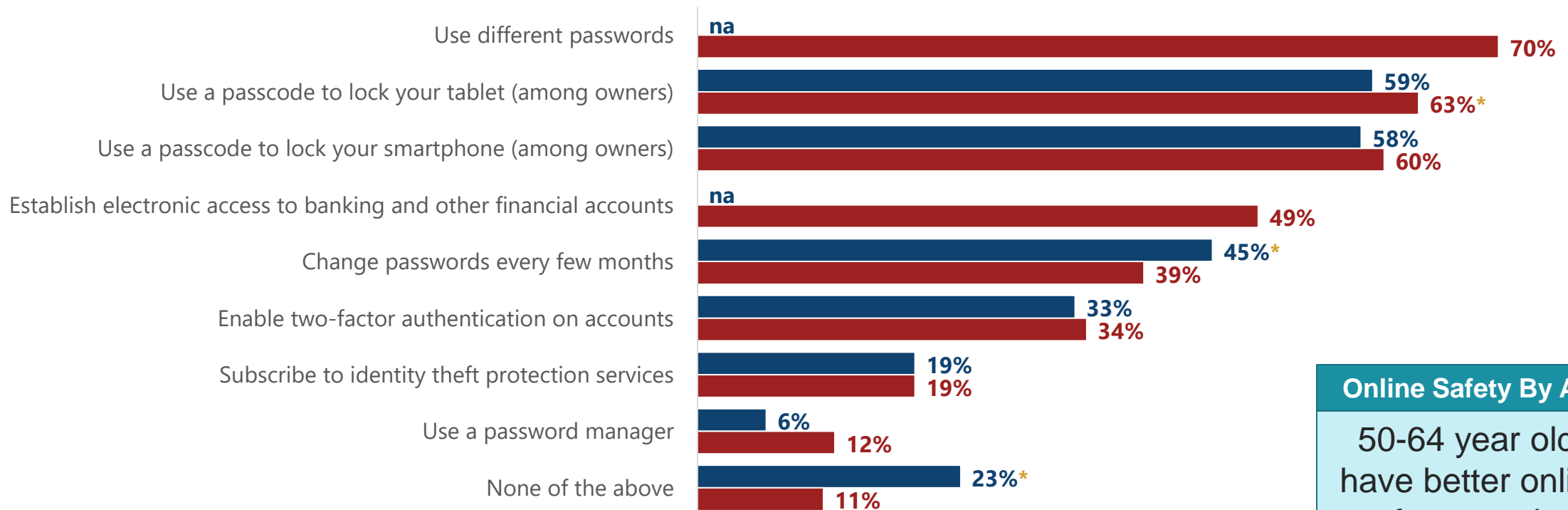
Base: Total Respondents (n=1,546)

Q.TECH6. How much do you trust the following businesses and institutions to keep your personal data secure online?

There are opportunities to educate adults 50+ on online safety best practices

Steps Taken for Online Safety

■ 2017 (n=1,520) ■ 2018 (n=1,544)



Online Safety By Age
50-64 year olds have better online safety practices than those 65+

* represents a statistically significant difference between years at the 95% confidence level. na sequences added in 2018
Base: Total Answering (n=1,544). Q.TECH5. Which of the following security measures have you taken to protect yourself online?



METHODOLOGY

Methodology

Objective: Repeat survey exploring technology use and attitudes among the 50+ around device ownership, common activities performed online, social networking, mobile usage, privacy and trust, and connecting with friends and family.

New in 2018: Interest and barriers to learning technology, fraud prevention, online dating, driver technology, and virtual reality.

- **Methodology:** Online quantitative survey using Ipsos Knowledge Panel
- **Qualifications:** Age 50 or older
- **Sample:** n=1,546 US Pop, 50+
- **Interviewing Dates:** November 19 - 30 2018
- **Language of Interview:** English and Spanish
- **Weighting:** The data will be weighted according to demographics for US adults age 50+
- **Questionnaire length:** The survey was approximately 15 minutes in length online



Note: Because the program allowed for no response, Total Answering is reported vs. Total Respondents on many of the questions.

About AARP

AARP is the nation's largest nonprofit, nonpartisan organization dedicated to empowering Americans 50 and older to choose how they live as they age. With nearly 38 million members and offices in every state, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands, AARP works to strengthen communities and advocate for what matters most to families with a focus on health security, financial stability and personal fulfillment. AARP also works for individuals in the marketplace by sparking new solutions and allowing carefully chosen, high-quality products and services to carry the AARP name. As a trusted source for news and information, AARP produces the nation's largest circulation publications, AARP The Magazine and AARP Bulletin. To learn more, visit www.aarp.org or follow @AARP and @AARPadvocates on social media.

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