

These days they've all got iPhones haven't they..?

An insight into the use of digital technology by young social housing customers.

Introduction

In summer/autumn 2011 WM Housing Group and communications agency The Bridge Group conducted a study into the attitudes and usage by young people from economically excluded backgrounds into communications technology. The aim was to understand how housing associations should best communicate with housing association customers of the future.

Background

No-one can deny that the rise and rise of the world wide web and associated technology is one of, if not the biggest, change to social interaction and communication in the last decade.

It seems hard to imagine a society where this technology is not a vital daily aspect of life, both in a business and personal context. According to the Office of National Statistics (ONS), in 2011 19 million, or 77% of UK households, now have internet access, 93% of which is broadband of some form.

Unfortunately that still leaves 5.7 million households without a connection and approximately 9 million people who have never accessed the internet at all. Of this group, people within social housing represent one of the biggest segments. On average 70% of social housing customers were not 'online' at the end of 2010.

In October 2011 the main factors that foster this state of 'digital exclusion' remain the same as they have for a number of years. According to the ONS '*Internet Access - Household and Individual 2011*' report those that are digitally excluded state that a) 19% didn't feel they can afford the internet b) 21% didn't have the skills to use the internet, and c) more than 50% said they didn't feel that they needed the internet.

However, like most forms of technology, over time a number of factors have combined so that the use of the internet is beginning to gain slightly greater usage even in hard to reach demographic groups. The changes include (but are by no means limited to) such things as increased competition, cheaper mobile access, public Wi-Fi spots and free access at libraries, and notably the current governments policy of 'digital by default' with regard to the provision

of public services. This policy means that more and more public services will be accessible primarily through the internet with other channels being more difficult to access. The intention is to bring about a culture whereby those members of the public who *can* access the internet *will do so* in the first instance when using public services.

As to how people in social housing use these types of technology, the rate at which changes are occurring, combined with the general lack of research into the use of this technology within the social housing customer base, makes it difficult to assess.

The project

Through a Young People's Digital Awareness study, which took place this summer, WM Housing Group and communications agency The Bridge Group set out to investigate the *attitudes and behaviours* of young people from less advantaged backgrounds in relation to the following criteria:

- Use of and access to the internet
- Use of and access to mobile phones and mobile internet technology
- Use of and access to social media.

It was hoped that the work would provide an insight into the mindset of this rapidly changing demographic group and allow us to draw comparisons with national averages.

Overview of the group studied

- The study group consisted of 62 young people aged between 11 and 21.
- Of this group 52% were aged 11-16 and 48% aged 17-21.
- Taken from across the west midlands region, they were chosen because they were either living in social housing or came from estates with a high density of social housing properties, and as such represented a key demographic group.
- All participants undertook a written survey and 20 of them were selected to attend an in-depth study day, allowing researchers to dig deeper into how the attendees viewed and used these communication technologies.

Access to computers and the internet

The group studied indicated that their access to the internet was broadly in line with national averages - 86% having some form of computer in their household with roughly two-thirds being laptops.

76% had internet access in some form, which is broadly in line with the national average, of which only 2% still used a dial-up connection. A departure from the broader UK picture came,

however, when looking at how this group accessed their broadband connection. Although the group indicated that three-quarters of them had home broadband (as opposed to the national average of 93%), 13% relied on mobile broadband (i.e. a mobile dongle), as the sole source of internet connection, which is notably higher than the national average of 5%.

Other methods of access to the internet utilised by this group included digital TV (4%), games consoles (29%) and mobile phones (43%). In addition 20% indicated that they regularly used other locations, such as schools, libraries and friends' houses, to get online.

Although 92% said that they had an email address, only 52% indicated that they used it regularly through a computer and this dropped to 30% via a mobile phone. We will consider the differences between the use of the internet through a computer compared to a mobile phone later in this report.

When accessing the internet through a computer, the group indicated a wide variety of interests and usage. YouTube (81%), various social media (79%) and music (65%) were the most popular sites, followed by shopping (57%), games (53%) and homework-related sites (51%). Other uses included general information (41%) and news (21%).

Perhaps unexpectedly, despite being of a younger age group, 61% indicated that they either already used online services, e.g. to make payments, or for banking, or would seriously consider doing so in the future.

Access to mobile phones and the internet

According to the ONS the 16-24 year old age group has shown the greatest rate of increase in the access of the internet through mobile phones in the last 12 months. 71% (up from 44% in 2010) of people in this age group access the internet through their mobile phone.

The key factor behind Smartphone ownership has traditionally been cost. Within social housing this remains an issue and our customers on lower incomes will struggle to keep up with the bleeding edge technologies on the market. However the lowering of costs on both handsets and tariffs, combined with the current vogue of phone providers offering free or discounted internet access on certain contracts and regular pay-as-you-go 'top ups' has seen in excess of 30 million mobile phones sold last year in the UK.

It is reasonable to assume that some of these will be to social housing customers. Our research bears this out. 98% of the group had a mobile phone. 52% had a traditional handset and 46% said they had a Smartphone. However, as at least three-quarters of our respondents claimed to access social media through their mobiles, it is safe to assume that at least that many have handsets that, whilst not being recognised as a modern Smartphone, are internet enabled and are being used to access the web.

In conversations during the research day, almost all of those questioned expressed the belief that in the long-term Smartphones will be the only available option and that owning a mobile phone would involve owning a Smartphone by default.

Beyond using their phones to regularly make phone calls (95%) and sending text messages (85%), the survey group's use of mobiles to access the internet differs from the way they access the internet through a computer.

In common with computer usage, social networking proved to be the most common way of using mobile phones to access the internet, at 75%, with games being next most popular at 51%, superseding the music and shopping sites popular with computer users. Instant messaging, the sort that went on to gain notoriety as a claimed key organising factor in the riots that happened across England this summer, was reasonably popular at 41%. Given that this feature is often exclusive to a specific network or brand e.g. Blackberry, it is likely to be something that has high take-up but in isolated pockets of usage.

28% said that they download 'apps' onto their phone, which is in fact three-quarters of those owning a Smartphone. However only 28% of those surveyed said that they actually 'surfed the web' via their phones in the same manner that they accessed the internet through a PC. This was reflected in conversations during the research day, when a number of participants expressed the belief that the things they did via a mobile were not necessarily the same as those they would do through a computer. Reasons cited included speed of access, size of screen and security.

Social media

Of the various forms of social media, Facebook, with its interactive features and YouTube, with its ability to share personal video content, remain the firm favourites amongst this age group.

In the case of YouTube 81% indicated they visited the site and 56% indicated they used it in a social media context, i.e. they have or would consider uploading and sharing content.

Access to social media remains consistent via both computers and mobiles, at just over three-quarters of those surveyed accessing it through one or both. In addition to this roughly the same percentage indicated they accessed these sites at least two or three times a week, with 37% doing so daily.

Interestingly, during the sessions a significant number of them expressed a high degree of cynicism towards celebrities and businesses using Facebook to promote themselves. It appears that whilst the young people do not necessarily fail to engage with these organisations because of this, they are fully aware that it is done to promote a product or service and do not feel that it is a particularly personal interaction. They engage on the basis that it will provide them with something, such as information or special offers, or because it

is convenient for them to do so. They do not feel that they are 'special' for doing so and do not consider the relationship they have with those people or organisations to be the same as they have with their 'real' friends.

Social media therefore has the potential to reach younger people, but it is not something they are likely to engage with just because it is there. To engage this group there has to be something 'in it for them'.

Shared ideas

When it came to visioning for the future, naturally the 20 people who attended the digital day had many ideas on how they would like to see digital media progressing. A common theme included a mobile phone application which could record voices and turn them into written words, which could be used at school and college. An application which turned pictures into 3D images also proved to be popular.

The underlying message was that they only saw the use of mobile technology increasing and becoming more integrated into daily life.

Communicating with this age group

One issue that is often raised in housing offices is the belief that email addresses and mobile numbers are changed too often to make regular use of them as a contact. However the increased popularity of web-based emails, e.g. Yahoo, Hotmail, etc, combined with the need for a consistent email address to register on many websites, has led to a longer retention of email addresses nationally. 92% of our group indicated they currently had an email address.

Mobile phone numbers have traditionally been transient, especially for lower-income individuals, because of the ease and attractiveness of beginning new contracts or moving networks to get the best deals. However, once again a number of factors are combining to change this trend. The ease of moving a mobile number to a new network has increased greatly and the standard mobile contract is now two years long. This might go some way to explain the fact that 75% of our group indicated that they only changed their mobile phone every 18 months or less often. Therefore the use of both emails and mobiles numbers should be considered as valid communications channels.

Despite this, housing associations should not reduce their paper stocks just yet. Perhaps one of the most telling questions asked of the young people was if WM Housing Group wanted to share information with them, how would they like to receive it. Their favourite answer was, in fact, by letter (48%). The next two answers were by text message (43%) and by email (40%). Nonetheless, 32%, despite the earlier mentioned cynicism, were happy to receive information through a social networking site.

Of those who attended the digital communications session, 65% of the youngsters preferred to liaise with their friends face-to-face and 70% preferred to communicate with organisations either face-to-face or on the telephone. Combining these results with the above statistics on mobile phone usage suggests that housing associations should not solely hide behind more complex technology. They would also do very well by calling people directly, or, as a less labour-intensive method, by conducting mass text messaging mail-outs.

What was learnt from this exercise?

Key considerations for housing associations, or any organisations which interact with people from lower income brackets, that can be identified from this study are:

- Access to the internet is considered something that is part of life by most of this age group. For households with people in this age range access is roughly in line with the national average. However our research did not indicate whether or not other family members were using this access or if it remained the domain of the younger age group.
- Access to this technology is likely to continue to grow within this age group, even though this group will remain slightly behind the curve in terms of the latest technology. Access to the most up-to-date technology, for example the latest iPhone, may be limited to more affluent individuals, but the lowering costs and greater availability of cheaper alternatives is gradually penetrating this demographic group.
- The study group is used to the immediacy and convenience that technology provides, but they have not lost site of the benefits of human interaction and often prefer to communicate face-to-face.
- Digital technology presents a viable series of communications channels for housing providers to share information and interact with this age group. However it should not be assumed that where access to this technology exists, that interaction will necessarily follow. Young people need to see a convenience or benefit to any form of interaction and are unlikely to communicate with organisations, in any form, merely for the sake of doing so.
- Despite their young age a healthy level of cynicism was shown through the study group's conversations. This shows that people of this age are a generation that has grown up saturated in all forms of media. As a result it seems that they have a habit of looking beyond the surface to see what is behind any message conveyed and what they can ultimately benefit from it.

- This age group's use of communications technology is as varied as any other aspect of life. For example, just because someone has a TV it does not follow they will watch 'Coronation Street'. The same is true of computer and mobile technology. The chance of someone interacting in a specific way or accessing a specific website depends on personal taste. The best an organisation can do is select the most popular forms of social media, etc and engage as many customers as possible by making the information and engagement techniques interesting and the organisation as accessible as possible.

Limitations of the project

This research was a micro study of youngsters from just two broad areas within the west midlands. For in-depth studies into any particular customer group, organisations should conduct further research. However the results can be used to inform future communications decisions for organisations which work with a more economically deprived customer base.

Recommendations from this research include

- It is vital that relevant organisations include digital media within its communications toolset. Although they may not yet be the primary channels for this demographic they are certainly significant.
- For the immediate future, when working with this demographic group, digital communications methods should be used in tandem with more traditional communications tools.
- Quantity and multiple types of communications media are not a substitute for quality communications. Messages will not be well received simply because they are delivered through a 'modern' channel. No matter what communications method is selected, if it does not engage the recipient it has failed.
- Customers will not necessarily use their mobile phones to access services in the same manner as they would on a computer. Therefore if organisations wish to encourage customers to engage with them through their mobile phones, they should consider this when planning the provision of their digital services. Dedicated services such as Smartphone Apps, as well as simpler channels, such as text messages, should be considered.

- Organisations should recognise the fact that younger people see this technology, not as a novelty, but as a part of daily life. Equally they see it as a matter of convenience to use digital channels, and as such are not likely to engage with organisations in this manner if the process is too complicated or less convenient than traditional channels.
- Technology is constantly changing as are the attitudes towards it. Therefore organisations would benefit from regular studies into communications methods used by customers to ensure that appropriate channels are being utilised.

What activity has WM Housing undertaken to address to digital inclusion agenda?

WM Housing is undertaking an wide reaching and ongoing programme of activity around the around the Digital Inclusion agenda. Please visit our association Websites to see the latest news.

Whitefriarshousing.co.uk

Kemblehousing.co.uk

Nexushousing.co.uk

Hardenhousing.co.uk

For more information on this report or related matters contact the WM Housing Communications Team on 024 7676 7219 or email view@wmhousing.co.uk

