

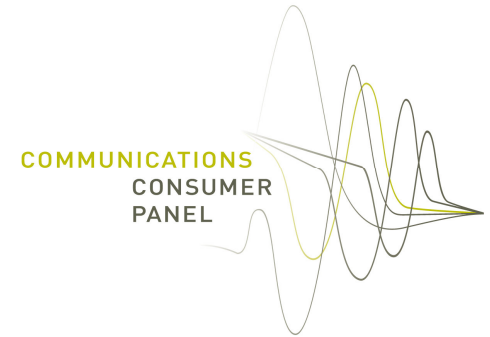
# Meeting the needs of consumers: the role of communications and the policy implications

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Panel**

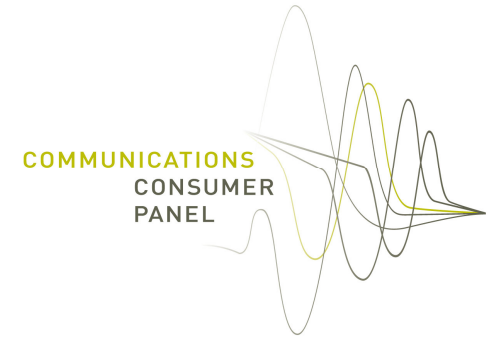
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# The Panel commissioned research on consumers' future needs



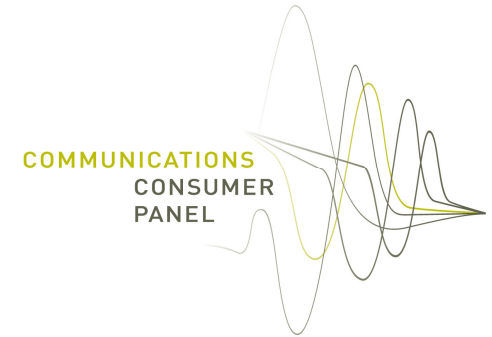
- The Communications Consumer Panel was established under the Communications Act 2003 as an independent advisory body, with the role of advising Ofcom and others on consumers' interests in telecommunications, spectrum and, with the exception of content issues, broadcasting.
- The Panel commissioned deliberative research to better understand the needs of consumers and what will be required to meet them in the future. It then considered the implications for policy and regulation in the communications sector.
- The value of a deliberative approach was that it encouraged participants to make collective decisions about future priorities and to recognise the trade-offs involved.

# Participants identified their life and consumer needs



- What will matter to people fundamentally is unlikely to change. 'Life needs' include personal fulfilment, social interaction, quality of life, and work satisfaction.
- How people judge whether their life needs are being met will change over time.
- People meet life needs in part by buying and using products and services. In doing so, they have certain 'consumer needs', which include quality, choice, ease of use, and access and affordability.
- Participants place a high value on communications services and devices. They help meet life needs by increasing access to information, providing new ways of keeping in touch, increasing convenience and flexibility, and providing new ways of being entertained.

# They then considered what will be required to meet their needs in the future



## Meeting consumer needs

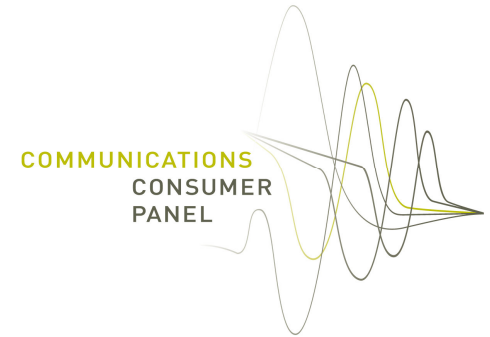
- **In response to time poverty** – processes need to be easy to use, efficient and reliable
- **In response to information overload** – information needs to be concise, up-to-date and relevant
- **In response to proliferation of choice** – need help to filter options and make right choices
- **In response to new possibilities** – increased expectations of customisation/personalisation
- **In response to more services moving online** – services need to be accessible, affordable and easy to use, and offline services need to be preserved for those who need them

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## Meeting life needs

- **In response to both offline and online developments** – need protection of personal data and education about risks
- **In response to health trends and lifestyle challenges** – need information and support to stay well and independent
- **In response to the effects of climate change** – need consumer devices to be energy efficient
- **In response to social/economic trends and Government policy** – need information and support to help themselves
- **In response to changing social and work patterns** – need the flexibility that communications services provide

# The Panel then considered the research implications



- The Panel explored the implications of the research with a range of stakeholders. There are four key messages:
  1. It is critical for all consumers and citizens that no one should miss out on the digital age – access to the internet has become an essential service.
  2. Security and privacy are vital to trust and confidence and therefore to the use of digital services and technologies.
  3. Consumers need help to manage increasing complexity and constant change/innovation.
  4. Consumers and citizens accept they have responsibilities in a digital environment, but they believe Government, regulators and service providers also have responsibilities that need to be met.

# The implications in more detail



## No one should miss out

- Access to a range of communications services is essential
- Broadband to access services seen as a right
- Broadband speed required will change over time
- Potential for deepening digital divide

## Everyone should meet their responsibilities

- Individuals, especially parents, will need to take responsibility, for harnessing communications services to meet their needs
- But they need help from Govt, regulators, service providers, equipment suppliers.
- Could clarify what all parties should expect from each other by defining communications rights and responsibilities.

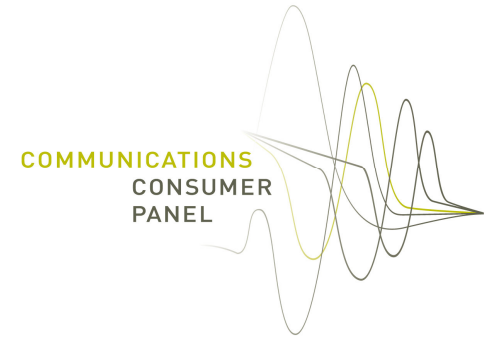
## Help in managing complexity and change

- Need help from industry and regulators to cope with 'more complex purchasing decisions'
- Consumers want straightforward routes to help and problem-solving
- Anxiety about perpetual change
- Would like life to be simpler

## Security and privacy are vital

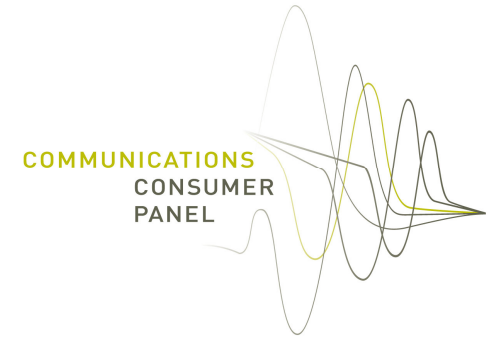
- Recognise the potential benefits of information sharing and want to do this, but will only embrace communications services fully if they trust companies, service providers and Government to treat their personal information with care
- Would like it to be easier to protect themselves

# Issues for Digital Britain to address



- Universal service at a level that provides access to digital services that are considered important by consumers and citizens.
- A joined-up information, advisory and problem solving capability to help in purchasing and trouble-shooting.
- A clear commitment and improved record on government and industry privacy and security issues.
- Simpler and more automatic privacy and security mechanisms that help consumers/citizens to take responsibility.

## Next steps for the Panel



- Finalise the research report and publish it in February.
- The Panel will reflect the research implications in its future work plan. For example, it is likely to be focusing on the issues of universal service, consumer information and usability of equipment and services.
- While some of the research findings sit very comfortably with previous research we and others have done, some are more surprising and might helpfully be tested out with a larger sample. In planning its future work the Panel will be considering whether, and if so how, to take this forward.
- The Panel will also need to decide whether to commission research to explore some of the findings further, e.g. on which communications services should be universally available and how they should be delivered.
- The Panel would be happy to discuss with Digital Britain common areas of interest so that its activities can contribute to the final Digital Britain report.