AARP

2022 TECH TRENDS AND THE 50-PLUS

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Executive summary

During COVID-19 older adults relied on technology to maintain some sense of normalcy and social connection. And while some aspects of day-to-day life have returned to normal (going to the grocery store, eating out, etc.), older adults' use of technology to help them stay connected with others remains a cornerstone in 2021.

- Three in four people 50-plus say they rely on technology to stay connected; 50s (76%), 60s (79%), and 70s (72%).
- Increases in most forms of communication is seen year over year: text, video chat, and social media.
- A desire to learn more about tech maintains steady as one in three (35%) say they would use technology more often if they knew how.

That said, some hurdles still exist for those 50-plus when it comes to access and use of technology.

- Two in five (42%) adults 50-plus do not feel technology is designed for all ages. The overarching complaint is that tech is not designed with older adults in mind due to design that is too complex, poor user experiences, and insufficient training materials.
- The cost of high-speed internet is seen as a problem for more than 50% of this population, regardless of their demographics.

Even so, adults 50-plus continue to expand their repertoire of tech devices owned, including home assistants.

- Year-over-year increases in ownership of the primary tech devices is seen again in 2021, although not to the extent of the rapid onset of growth in 2020 that was a result of the pandemic and significant social isolation.
- One-third (35%) of those 50-plus now own a home assistant, up from 17% just two years ago and nearly one-third (30%) own a wearable, up from 17% in 2019.

Executive summary

Some tech behaviors formed during the pandemic appear to be here to stay.

- Older adults continue to incorporate tech into their lives. The significant increases in the use of smartphones and tablets recorded in 2020 for such things as making online purchases, ordering groceries, banking, and engaging health services continued in 2021, as did the increased use of a multitude of apps.
- Video chat, which was relatively a new concept for many of older adults, has continued to grow in its use and interest.
- Engagement in the various social media apps diversified as those 50-plus continue to find new ways to connect with others, pursue personal passions, and be entertained.

Older adults have a variety of motivations for engaging with technology.

- Staying connected with others, being entertained, and managing day-to-day living are the top motivations among those 50-plus for engaging with technology.
- While the large shift in entertainment consumption from cable to streaming appears to have leveled off in 2021, the frequency of using streaming services continues to increase year over year. On average, older adults subscribe to three services, yet more than half (58%) feel they pay for too many platforms.
- While the top subscription platforms did not change (Netflix, Amazon, Hulu), HBOMax and Peacock showed strong growth among adults 50plus, with subscription rates similar to Disney+.

Almost one-third (30%) of adults 50-plus use technology to support or encourage a passion.

• Tech was used in a variety of ways this past year related to passions; e.g., watching videos, researching 'how-to' tutorials, buying supplies online, taking online classes, and joining social media groups to interact with those of similar interests.

Executive summary

The pandemic expanded interest and reliance on smart home technology.

- About one in three (29%) are motivated to use technology to maintain their personal independence.
- Learning how to use and manage smart home technology is a top interest of the 50-plus.
- Almost one-fourth (23%) now have smart home technology, up from 10% in 2019. Twenty-eight percent (28%) use their smartphone to manage smart home technology.
- Smart home cleaning devices were purchased at a similar rate across age groups. Home health and safety devices were also purchased at the same rate regardless of age.

A significant portion of adults 50-plus express interest in new technology.

- Most (64%) are interested in at least one type of up-coming technology advancement.
- Health-related innovations such as diagnostic toilets and daily objects that automatically track health measures are top interests.

Older adults are continuing to spend money on tech.

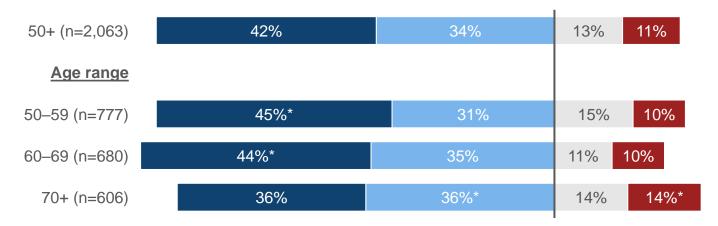
- Most (70%) made a tech purchase in the past year and while the year-over-year increase is not as significant as 2019 to 2020, it remains significantly higher than 2019 expenditures (\$821 vs. \$394) with tech spending projections expanding to \$108 Billion in 2030.
- Smartphones and related accessories, along with Bluetooth headsets and smart TVs continue to top the list of tech purchases made across all ages.

TECH TO CONNECT

The reliance on technology to stay connected and in touch with friends and family remains a cornerstone with 76% of those 50-plus saying they rely on it, including three in four adults in their 50's (76%), 60's (79%), and 70's (72%).

Agreement with "I rely on technology to stay connected and in touch with friends and family" *Among adults 50+ and by age range*

Strongly agree Somewhat agree Neutral Somewhat or strongly disagree

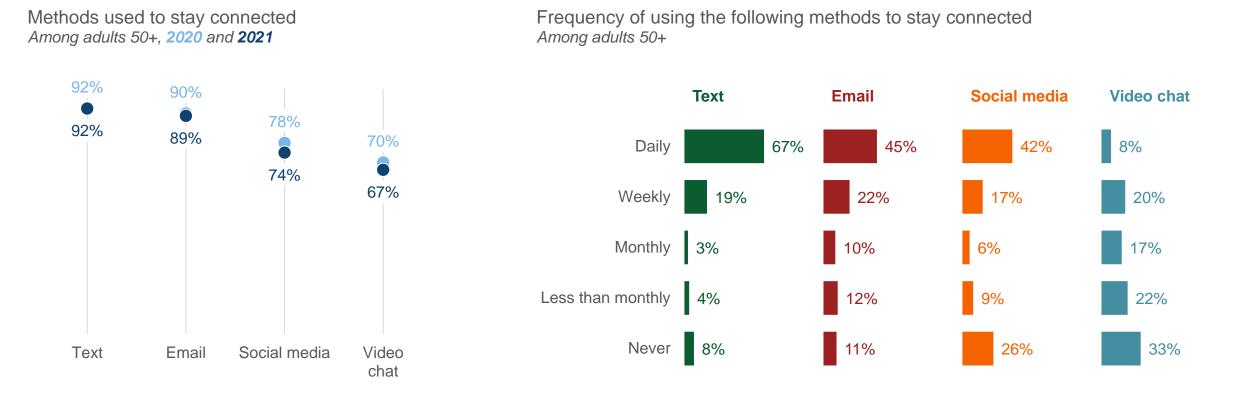


Base: Total 50+ Respondents (n=2,063)

Q11. Please rate how much you agree or disagree with the following statement.



Older adults engage with multiple types of online communication to stay connected with others and report a year-over-year increase in the use of video chat, texting, and social media.



Base: Total 50+ Respondents (n=2,063)

Q12. How often do you use each of the following to communicate with and stay connected to friends and family?

A desire to know how to use technology in a variety of ways maintains steady, from 39% to 35%. A growing comfort with technology among the 50-plus likely impacts perceptions of the need to get a better grasp on tech which has softened from 54% to 44%.

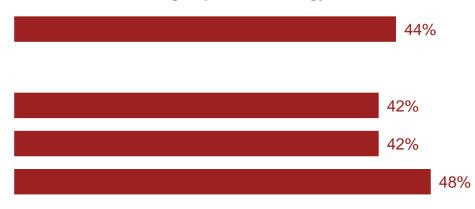
Percent who **would use tech more if they knew how** and who **would like a better grasp on technology** *Among adults 50+ and by age range*



Would use tech more if they knew how

Base: Total 50+ Respondents (n=2,063)

Q23a_2. Please rate how much you agree or disagree with the following:



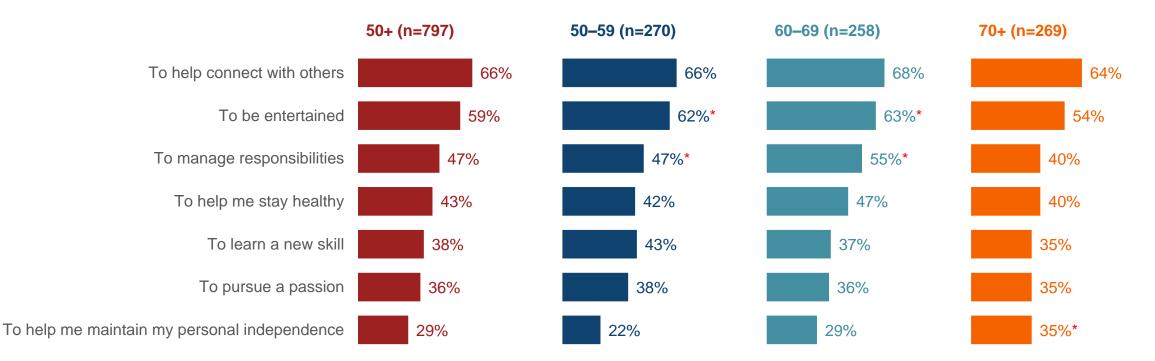
Would like a better grasp on technology

Base: Total 50+ Respondents

Q20. Do you wish you had a better grasp of technology in general to allow you to more frequently and easily connect with others?

Older adults' primary motivations to use tech more are to stay connected, be entertained, and manage day-to-day living.

Motivations for using technology more in daily life Among adults 50+ and by age range

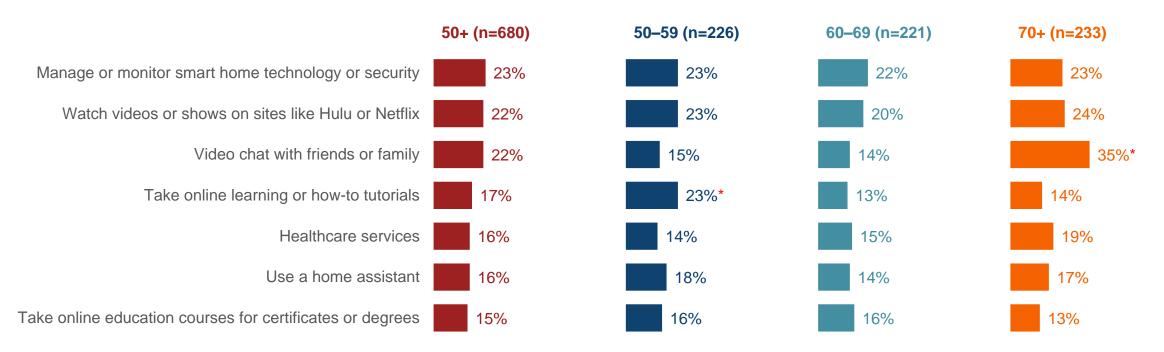


Base: 50+ Respondents Would Use Technology More in Daily Life if Knew How

Q23a_3. Which of the following best describes your motivation for wanting to use technology more in your daily life? [NEW QUESTION 2021]

Learning how to manage smart home tech, stream entertainment, and video chat interest the 50-plus the most.

Top technology activities of interest Among adults 50+ and by age range



Base: 50+ Respondents Would Use Technology More in Daily Life if Knew How, Uses (Device), Hasn't Performed Activities With Devices in Past Three Months

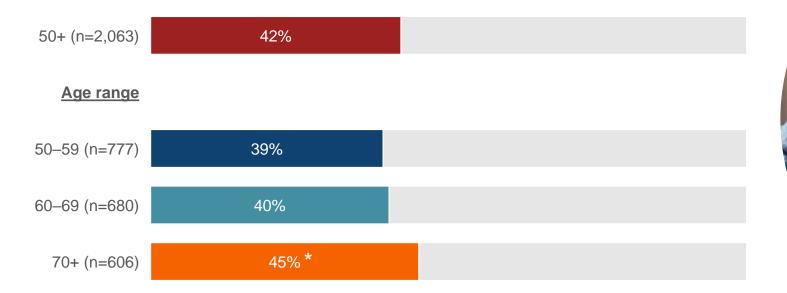
Q23b_2. Now, more specifically, thinking about the technology you currently own, which of the following activities would you like to use it for, if you had the knowledge and felt comfortable doing so? [NEW QUESTION 2021]

TECH HURDLES

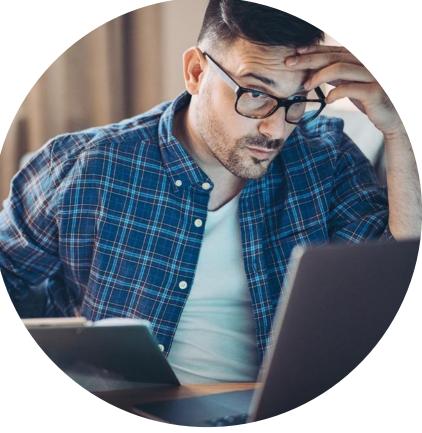
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Two in five adults 50-plus feel technology is not inclusive, nor designed for people of all ages. The older a person is, the more inclined they are to feel that technology is not designed with all people in mind.

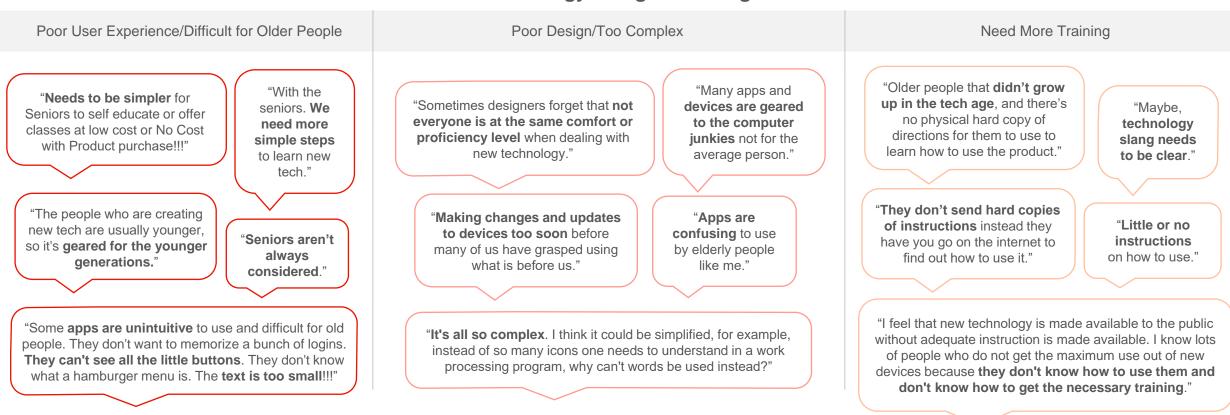
Percent who do not think technology is designed with people of all ages in mind Among adults 50+ and by age range



Base: Total Respondents (50+: n=2,063; 50-59: n=777; 60-69: n=680; 70+n=606) Q28b. Do you feel like technology today is being designed with people of all ages in mind? [NEW QUESTION 2021]



Across all ages, poor design and user experiences are central to the overarching complaints that technology is not designed with older adults in mind.

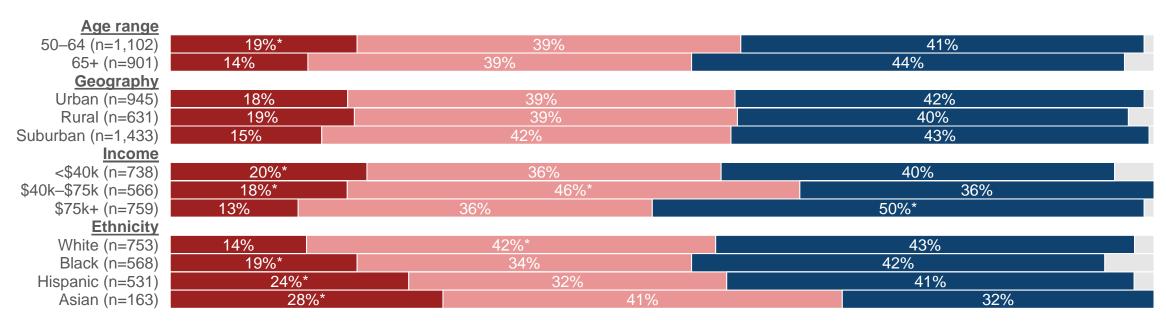


Where Technology Design is Falling Short

Base: Those who feel technology is not designed with all ages in mind (n=576) Coded Q28c. Where do you feel the design of technology today is falling short? [NEW QUESTION 2021]

Older adults and those living in rural areas have limited access to highspeed internet.¹ Even among adults with internet access, over half (56%) say cost is a problem.

How problematic cost of monthly high-speed internet is *Among adults 50+, by age range, geography, income, and ethnicity*



Major problem
Minor problem
Not a problem
Not applicable or don't know

Base: Total 50+ Respondents

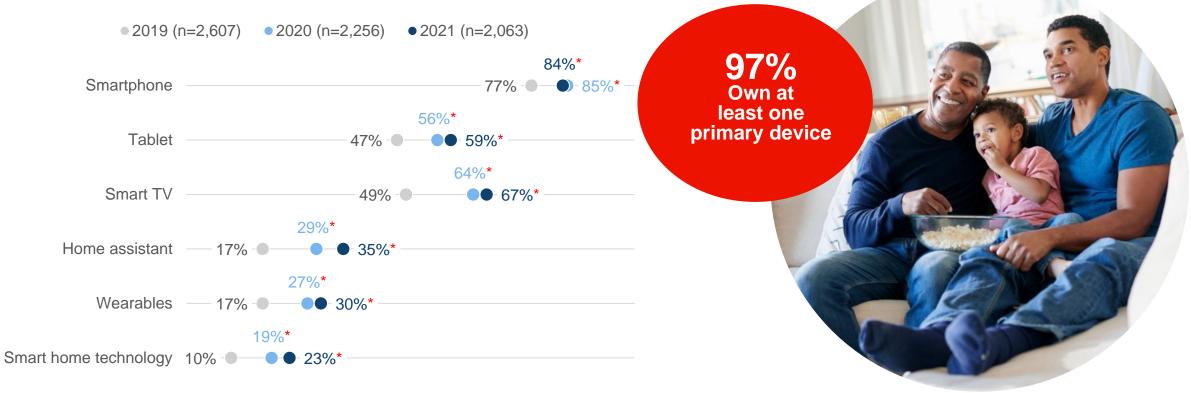
Q5b. How much, if at all, is the cost of monthly high-speed internet a problem for you?

¹"<u>Aging Connected: Exposing the Hidden Connectivity Crisis for</u> OlderAdults." Humana Foundation and OATS, May 2021.

TECH OWNERSHIP AND USE

The sharp growth in tech ownership seen in 2020, motivated mostly by the pandemic, begins to level off in 2021.

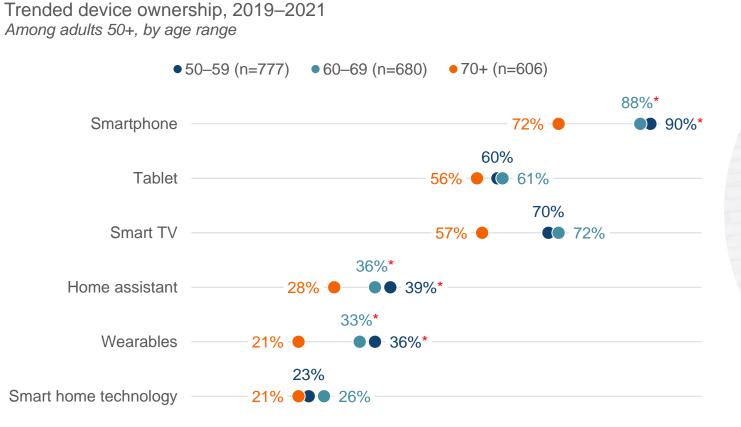
Trended device ownership, 2019–2021 Among adults 50+



Base: Age 50+ Respondents

QTech1/Q2. Which of the following items do you have/own? Q6. Do you currently own a smart TV?

The rates of ownership for most of the primary tech devices are very similar for those in their 50s and 60s. Those 70-plus are not too far behind.





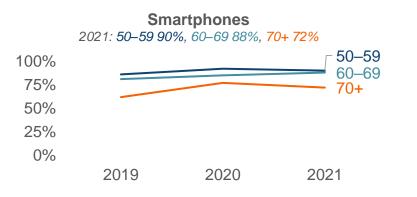
* Indicates a significant difference at a 95% confidence level

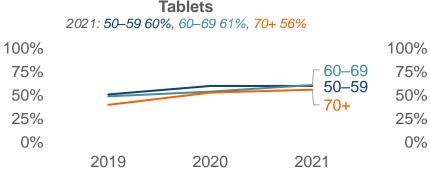
Base: Age 50+ Respondents

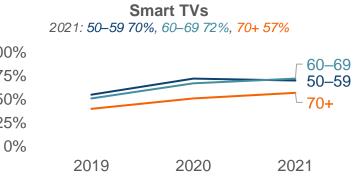
Q2. Which of the following items do you have/own?

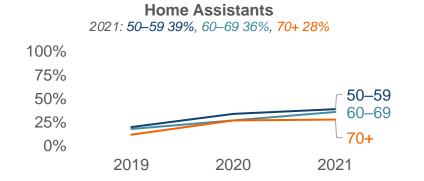
In evaluating year-over-year trends, ownership among those 50–59 are reaching a possible plateau, while those 60–69 have steady growth in all primary devices.

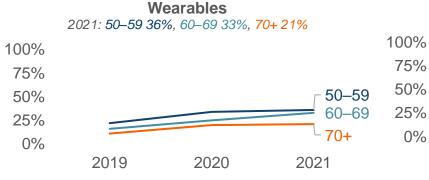




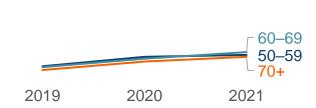










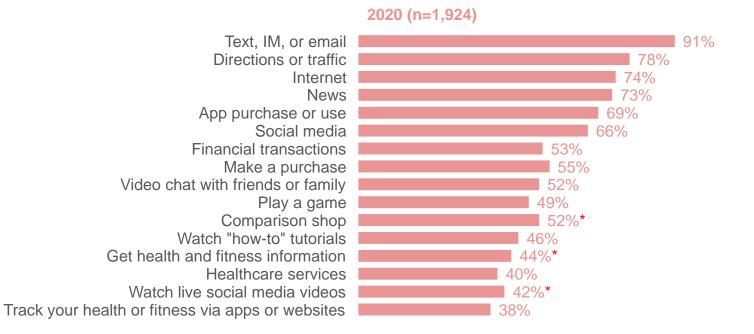


Base: Age 50+ Respondents

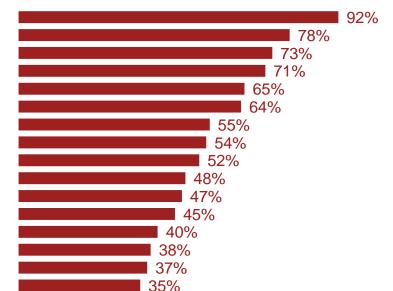
Q2. Which of the following items do you have/own?

Smartphone activities embraced during the pandemic such as making a purchase, banking, and telehealth services are more mainstream in 2021.

Most popular activities performed on a smartphone in the past three months, 2020 and 2021 *Among adults 50*+



2021 (n=1,743)



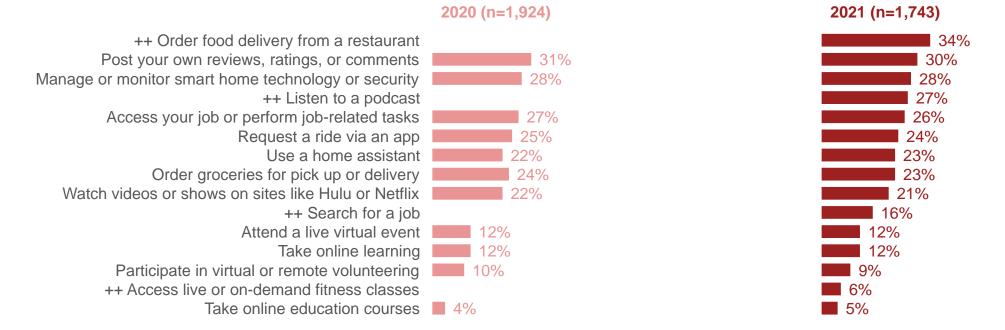
Base: Those who use a Smartphone

Q4. For each device listed below, please indicate the activities that you have used it for in the past 3 months?

*Indicates a significant difference at a 95% confidence level ++ indicates new item in 2021

Smartphones continue to be adopted in new ways to manage day to day living. One in three have ordered food delivery and one in four listen to podcasts on their smartphones.

Moderately popular activities performed on a smartphone in the past three months, 2020 and 2021 *Among adults 50*+



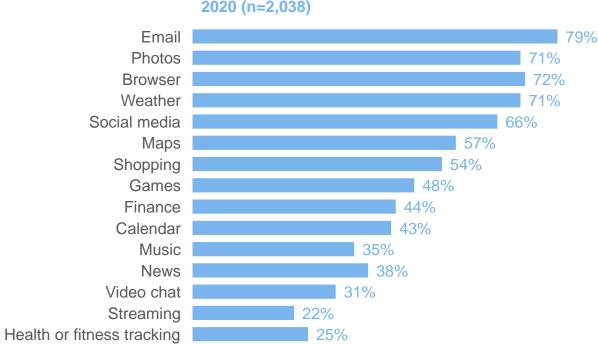
Base: Those who use a Smartphone

Q4. For each device listed below, please indicate the activities that you have used it for in the past 3 months?

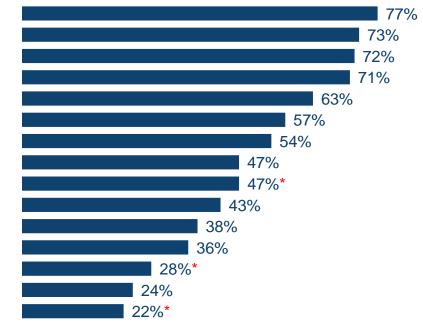
*Indicates a significant difference at a 95% confidence level ++ indicates new item in 2021

Weekly app usage seen in 2020 remains mostly consistent in 2021, as the 50-plus maintained new behaviors such as app based shopping, banking and entertainment.

Top applications used weekly, **2020** and **2021** *Among adults 50*+



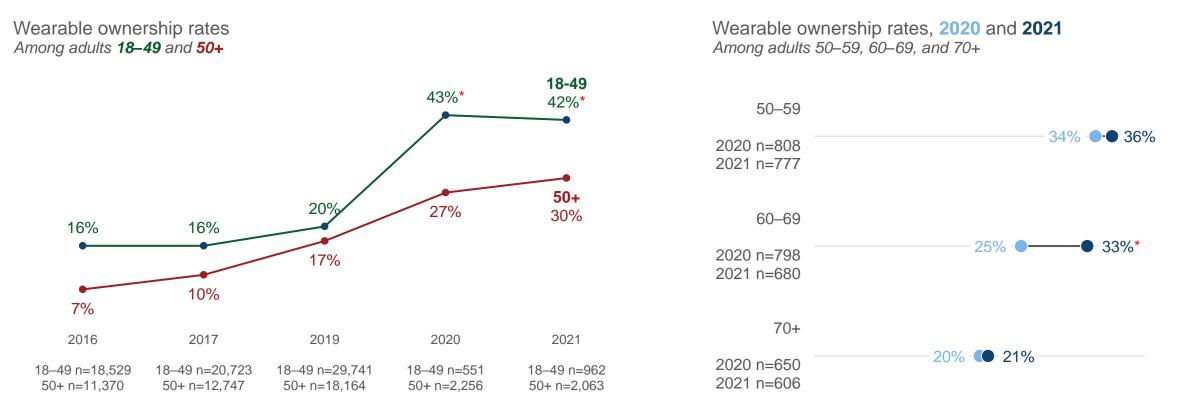




Base: Those who use smartphones or tablets

Q10. Which of the following apps do you use on your smartphone or tablet at least once a week?

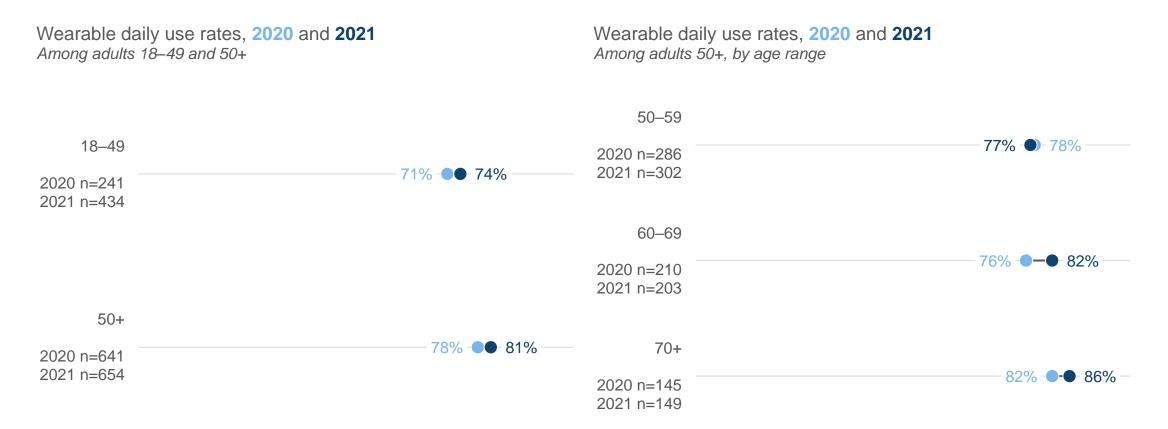
Ownership of wearables has increased among adults 50-plus as both those in their 60's and 70's report increases in ownership year over year.



* 2014-2019 Source: Forrester Analytics; Consumer Technographics Online Benchmark Survey (Part 2) 2020 Source: Q2. Which of the following items do have/own?

Base: Total 50+ Respondents *Indicates a significant difference at a 95% confidence level

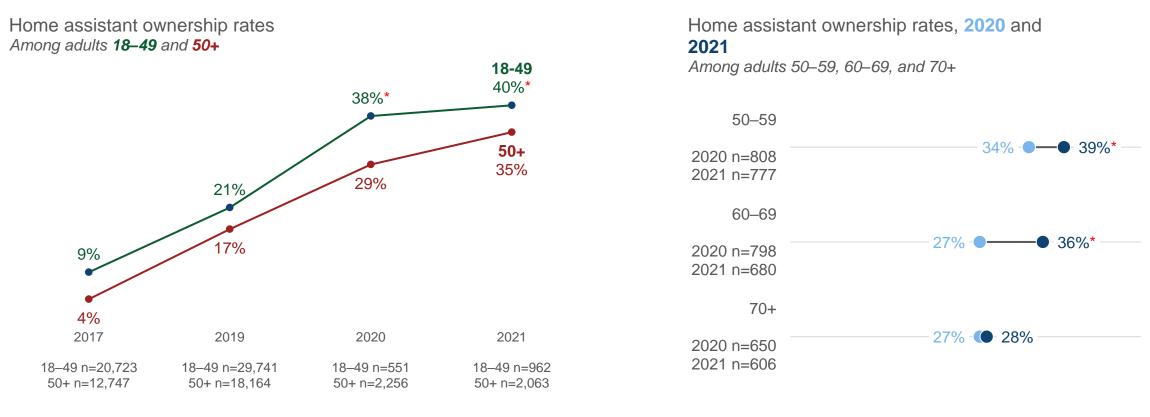
Among those who own a wearable, the majority use it on a daily basis, regardless of age.



Base: Those who own a wearable

Q3. How often do you currently use the following?

Ownership rates of home assistants continues to increase among adults 50-plus with significant year-over-year increases among those in their 50s and 60s. Growth among those 18–49 has slowed.

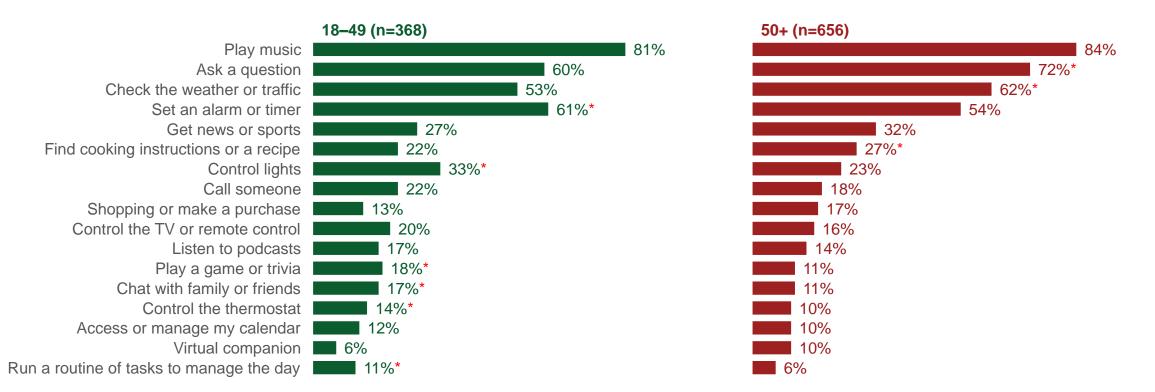


2014-2019 Source: Forrester Analytics; Consumer Technographics Online Benchmark Survey (Part 2) 2020 Source: Q2. Which of the following items do have/own?

Base: Total 50+ Respondents

Regardless of age, people use home assistants most commonly to play music, answer a question, set a timer, or check the weather or traffic.

Top uses of home assistants Among **adults 18–49** and **adults 50+**



Base: Those who use home assistants

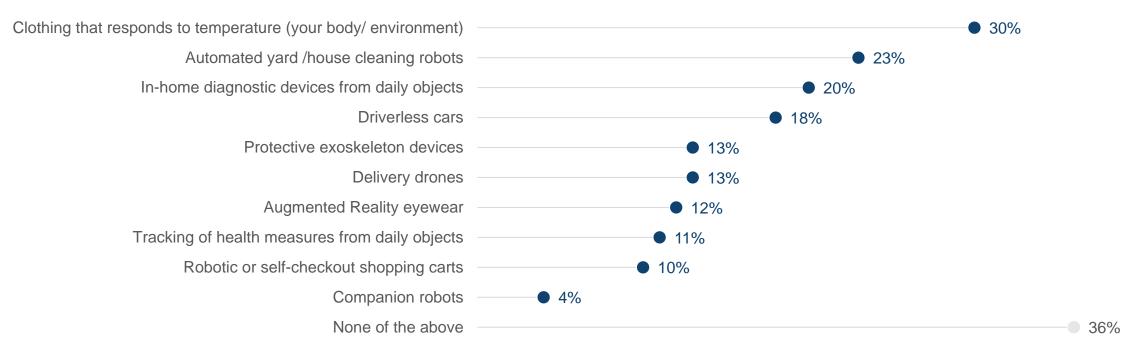
Q42a. Earlier you mentioned using a home assistant such as Amazon Echo/Alexa, or Google Home. What types of things

do you use your home assistant for? [NEW QUESTION 2021]

Historically, adoption of new technology rises as awareness and interest grow.

This is a promising trend when considering emerging technology, as most (64%) of those 50-plus are interested in at least one type of new technology. Many are interested in health-related innovations such as diagnostic toilets and daily objects that automatically track health measures.

Interest in the following new technologies *Among adults 50*+



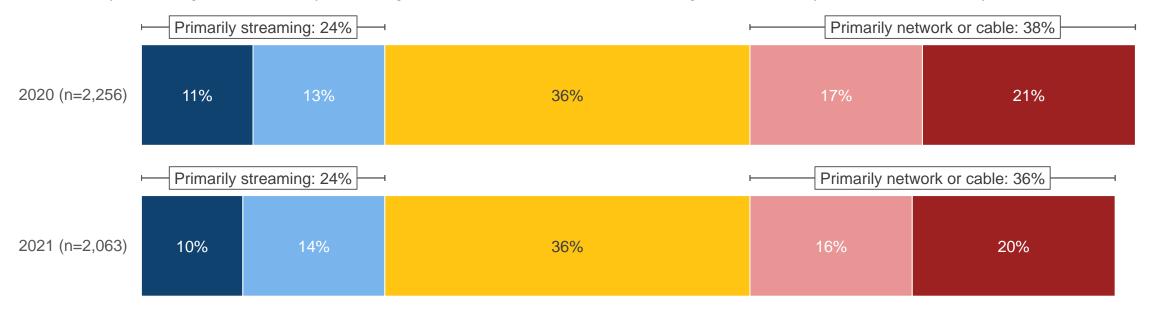
Q43. Still thinking about advancements in technology, which of the following are you most interested in taking advantage of now or when they become available? Please select your top 3. [NEW QUESTION 2021]

TECH TO ENTERTAIN AND GROW

Compared to 2020, older adults' viewing habits and their use of streaming has stabilized. They enjoy blending viewing experiences.

Methods of watching shows, movies, series and videos, 2020 and 2021 *Among adults 50*+

Only via streaming services Primarily via streaming services A mix of network or cable & streaming services Primarily via network or cable Only via network or cable



Base: Total 50+ Respondents

Q7. How do you generally watch shows, movies, series, and/or videos?

Those who do not watch any show, movie, series or video: 2020: 2%, 2021: 4%.

Streaming platform subscriptions increased slightly year over year, with adults 70-plus boosting their subscriptions across each of the top platforms.

New platforms HBO Max and Peacock TV join the list of services with strong subscription rates.

Streaming services used Among adults 50+ and by age range

	AVG #	2.9 50	50+		3.3 50-59		2.9 60-69		2.5 70+	
		2020	2021	2020	2021	2020	2021	2020	2021	
	Base:	1,833	1,711	716	697	645	565	472	449	
%	NETFLIX	67%	69%	73%	74%	65%	68%	61%	65%	
el like they paying or too	amazon prime video	55%	58%	55%	59%	61%	60%	49%	54%	
	hulu	29%	32%	36%	40%	31%	32%	18%	22%	
es	Disnep+	21%	25%*	28%	35%*	20%	23%	13%	15%	
	HBOMAX	12%	23%*	13%	26%	11%	23%	14%	18%	
	peacock	12%	21%*	12%	24%*	12%	20%*	14%	18%	

Base: Respondents Who Stream Content

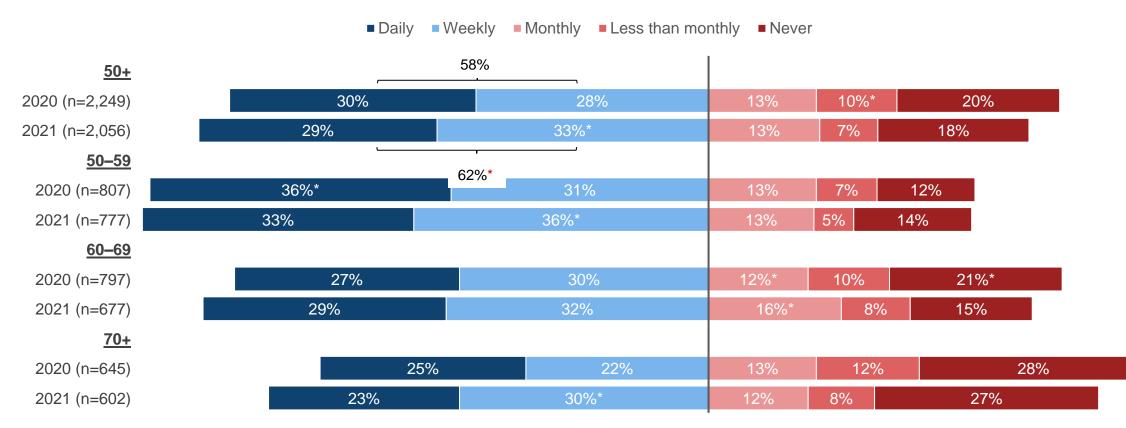
Q9. Which of the following streaming services do you currently subscribe to?

Q9b. Please indicate how much you agree or disagree with each of the following statements as it relates to the streaming services you subscribe to.

*Indicates a significant difference at a 95% confidence level NOTE: Disney+, HBOMax, and Peacock were added to the list in 2020,

All age groups report a slight increase in their frequency of streaming (up from 58% to 62% weekly or more often).

Frequency of streaming shows, movies, series, or videos Among adults 50+ and by age range, 2020 and 2021



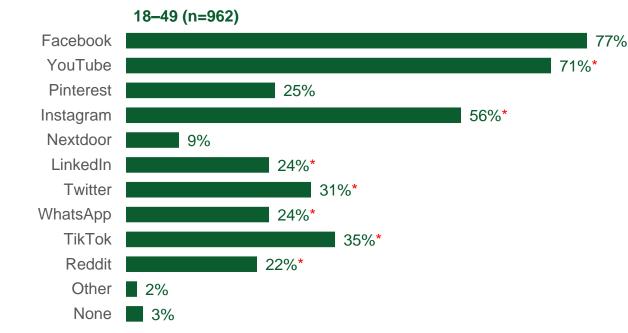
Base: Total Respondents (Answers not forced)

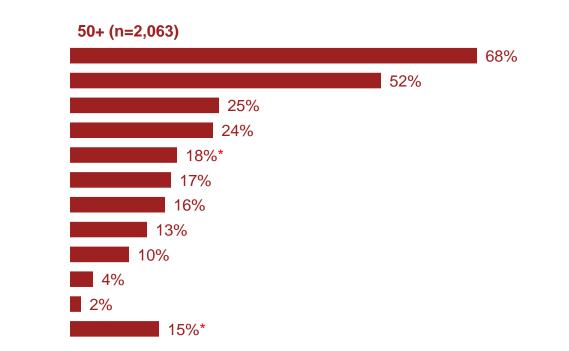
Q8. How often do you watch streamed shows, movies, series, or videos?

While Facebook remains the most popular social media site across age groups, engagement is spread across a variety of platforms.

TikTok, Twitter, and LinkedIn showed significant growth while Instagram remained steady.

Social media platforms used Among adults 18–49 and adults 50+





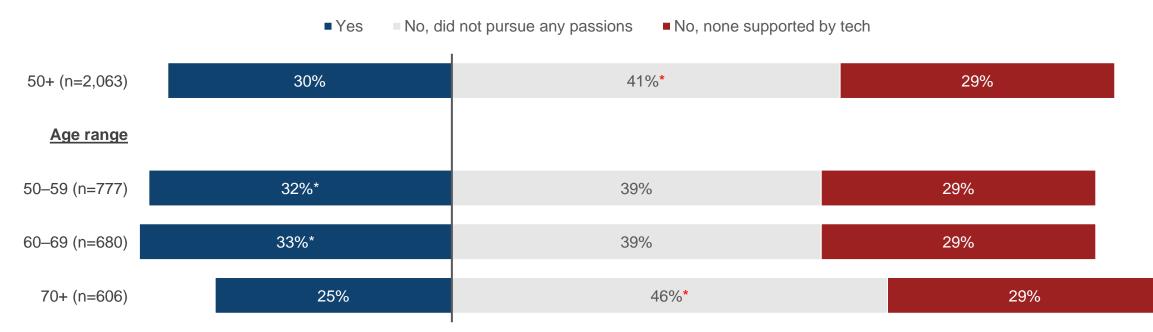
* Indicates a significant difference at a 95% confidence level

Base: Total Respondents

Q12B. Which of the following social media platforms do you use?

Three out of 10 older adults used technology to pursue a passion or interest in the past year, which may present an opportunity for content creators.

Pursued any passion or interest through technology in the past year Among adults 50+ and by age range



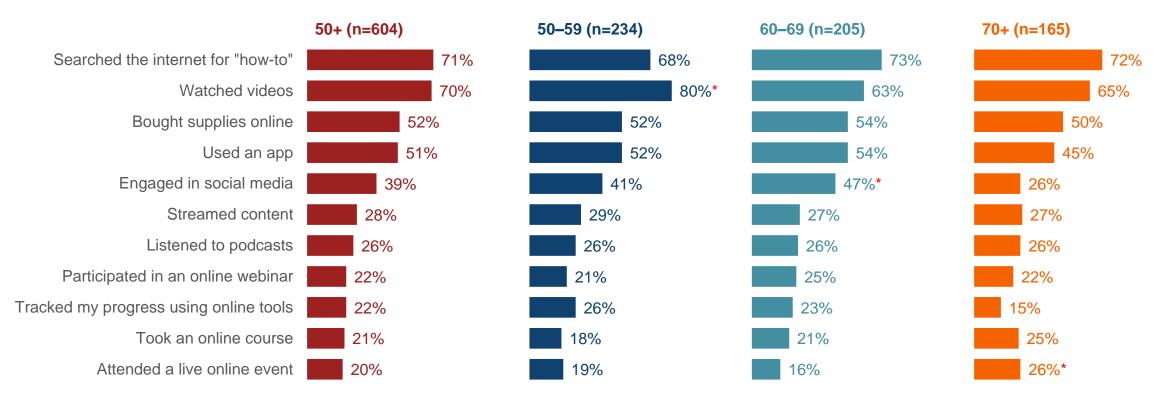
Base: Total Respondents

Q50. Now, thinking about the past year, did you pursue any passion or interest, or build a skill that was supported or

encouraged through the use of technology? [NEW QUESTION 2021]

Technology, particularly video, enabled many people to pursue their passions. How-to and other video content were the most popular.

How passions pursued in the past year were supported by technology Among adults 50+ who pursued a passion supported by technology and by age range



Base: 50+ Respondents Pursued Passion Supported/Encouraged through Technology Use

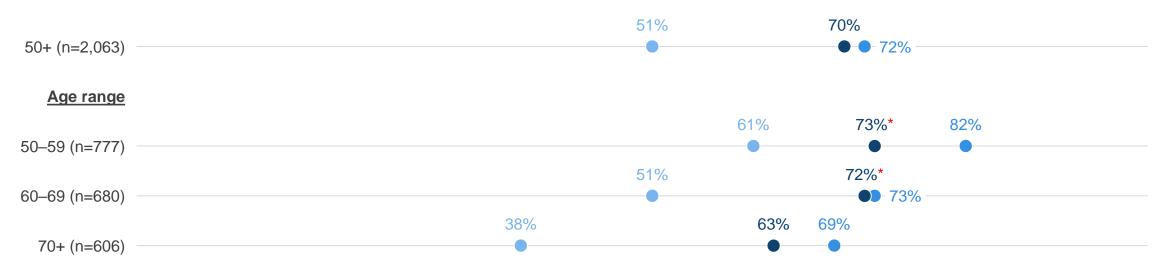
Q51. In which of the following ways was the passion(s) you pursued last year supported by technology? [NEW QUESTION 2021]

TECH SPEND

35

Most older adults have purchased a new tech item in the last year, with relatively similar purchase rates across the 50-plus age cohorts. The tech purchase rate is only slightly down from 72% in 2020, but up significantly from 51% in 2019.

Percent who bought a new tech item in the past year Among adults 50+ and by age range, 2019, 2020, and 2021



Base: Total Respondents

Q30. Which specific technology products did you purchase in the past year (September 2020 - September 2021),

for yourself and/or your household?

Adults in their 50's outspent older adults on tech purchases. Smartphones and related accessories, along with Bluetooth headsets and smart TV's continue to top the list of purchases made across all ages.

Tech items purchased in the past year

	18-49	50+
base:	962	2,063
Smartphone	37%*	30%
Smartphone accessories	35%*	30%
Bluetooth headset/ear buds	34%*	23%
Smart TV	25%*	20%
Laptop computer or Netbook	21%*	16%
Tablet	17%	15%
Wearable device	17%*	12%
Gaming system	15%*	5%
Home assistant	10%	9%
Smart home technology/security	9%	8%
Desktop computer	9%	7%
Digital camera	7%*	4%
Smart home cleaning device	5%	5%
Home audio equipment	6%*	4%
E-reader	4%	4%
Virtual reality (VR) device	4%*	2%
GPS tracker designed to monitor/share location	2%	3%
Home health and safety device	2%	2%
Digital connected fitness equipment	3%*	1%
Other	1%	2%
None	17%	30%*

Total tech spend in the past 12 months Among adults **18–49**, **50+**, and by age range



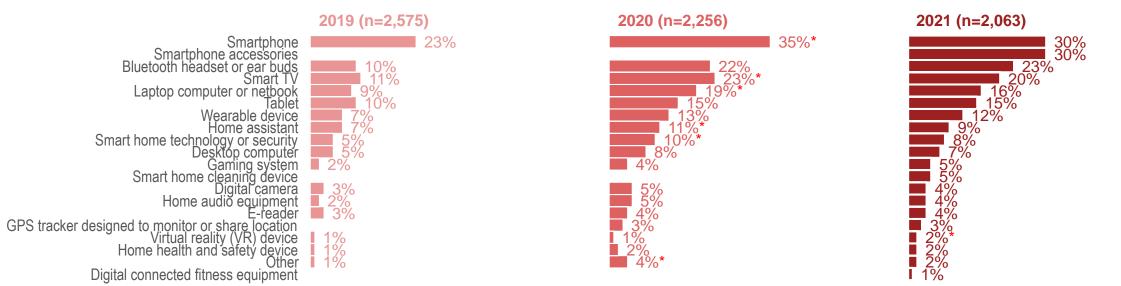
Base: Total Respondents

Q30. Which specific technology products did you purchase in the past year (September 2020 - September 2021), for yourself and/or your household?

Q31. Thinking about all of the different tech items you purchased in the past 12 months (September 2020 - September 2021), approximately, how much did you spend in total?

Tech spending increased between 2019 and 2021, with a smaller increase in 2021 than the pandemic-inspired peak that occurred in 2020. Big ticket purchases such as smartphones and smart TVs dropped at a greater rate compared to less expensive items like earbuds and tablets.

Tech items purchased 2019, 2020, and 2021 Among adults 50+



Base: Total Respondents

Q30. Which specific technology products did you purchase in the past year (September 2020 - September 2021), for yourself and/or your household?

Q31. Thinking about all of the different tech items you purchased in the past 12 months (September 2020 - September 2021), approximately, how much did you spend in total?

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Tech purchases among those in their 60's only leveled off slightly compared to younger or older adults.

		50-59		60-69			70+		
	2019	2020	2021	2019	2020	2021	2019	2020	2021
Base:	961	808	777	838	798	680	77700%	650	606
Smartphone	29%	45%*	35%	23%	35%*	29%	15%	24%	24%
Smartphone accessories			35%			34%			20%
Bluetooth headset/ear buds	16%	31%	28%	8%	19%	26%*	4%	15%	13%
Smart TV	15%	25%	25%	11%	17%	21%	8%	14%	14%
Laptop computer or Netbook	11%	17%	17%	8%	16%	19%	6%	13%	11%
Tablet	12%	20%*	15%	11%	10%	14%	8%	9%	16%*
Wearable device	11%	15%	15%	6%	11%	12%	4%	8%	10%
Home assistant	7%	8%	10%	7%	12%	10%	5%	4%	7%
Gaming system	4%	12%*	8%	1%	10%*	4%	1%	8%*	2%
Smart home technology or security	6%	5%	8%	5%	6%	11%*	4%	3%	6% *
Desktop computer	5%	6%	7%	4%	5%	8%*	4%	3%	6%*
Smart home cleaning device			6%			6%			5%
Digital camera	3%	8%*	5%	4%	2%	3%	2%	1%	4% *
Home audio equipment	3%	3%	4%	3%	3%	5%	1%	2%	3%
E-reader	3%	2%	4%	3%	1%	4%	3%	2%	5%
GPS tracker designed to monitor or share location		2%	4%		5%	3%		4%	2%
Virtual reality (VR) device	1%	2%	3%	0%	1%	2%	0%	1%*	0%
Home health and safety device	1%	2%	2%	1%	1%	3%	2%	2%	2%
Digital connected fitness equipment			1%			1%			0%
Other	1%	2%	1%	1%	5%*	1%	1%	1%	2%

Base: Total Respondents

Q30. Which specific technology products did you purchase in the past year (September 2020 - September 2021), for yourself and/or your household?

Q31. Thinking about all of the different tech items you purchased in the past 12 months (September 2020 - September 2021), approximately, how much did you spend in total?

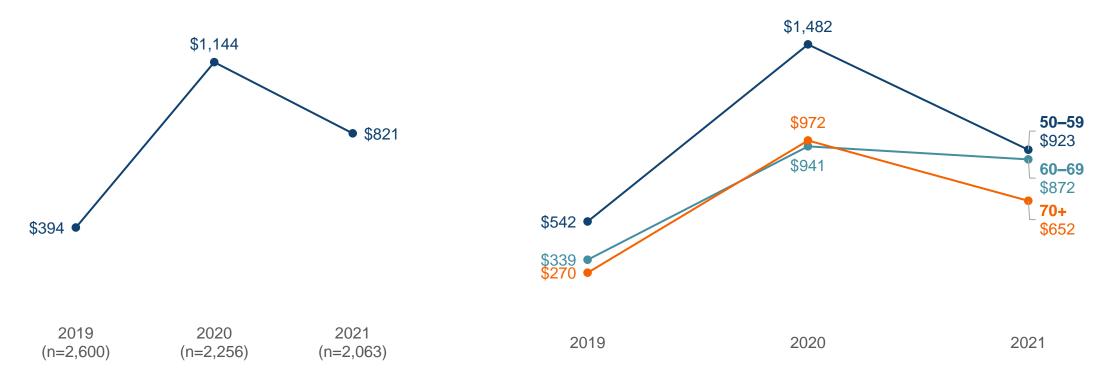
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* Indicates a significant difference at a 95% confidence level **AARP RESEARCH** 39

By 2030, the 50-plus market is projected to swell in ranks to 132 million and spend on average \$108 billion annually on tech products.

Total tech spend, 2019–2021 Among adults 50+

Total tech spend, 2019–2021 Among adults 50+, by age range



Base: Total Respondents

Q30. Which specific technology products did you purchase in the past year (September 2020 - September 2021), for yourself and/or your household?

Q31. Thinking about all of the different tech items you purchased in the past 12 months (September 2020 - September 2021), approximately, how much did you spend in total?

Source: US Census Bureau and AARP. Population estimates calculated by AARP. Projected spend calculation: 132M x \$821 average spend.

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METHODOLOGY

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5

AO

Methodology: Quantitative Survey — n= 3,025

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

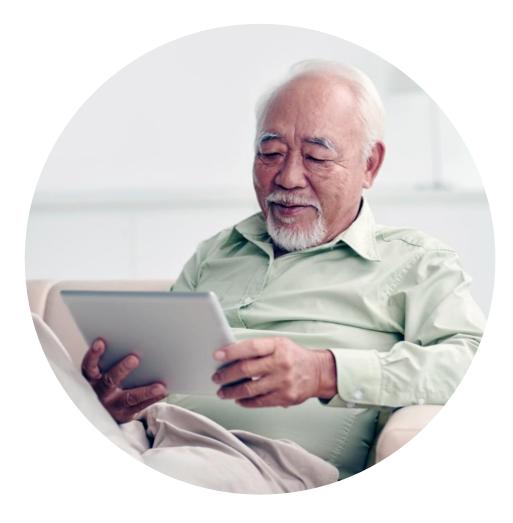
NEW IN 2021: Passions, the Design of Today's Tech, New Tech, and Proactive Privacy

- Methodology: Online survey using NORC's research panel + Dynata
- Qualifications: Ages 18+, US Pop
- Sample: Total Respondents: n=3,025; 50+ Respondents: n=2,063
- Interviewing Dates: September 14 October 14, 2021
- Language of Interview: English and Spanish
- Weighting: The sample is weighted according to demographics for US adults age 18+, 50+, and by generation; similar to 2020 weighting design. Refer to www.aarp.org/2022techtrends for full methodology report
- **Questionnaire length:** The survey was approximately 19 minutes in length online



Respondent profile

	18-49	50+	50-59	60-69	70+
Base:	962	2063	777	680	606
Gender					
Male	50%	47%	49%*	48%*	44%
Female	51%	53%	51%	53%	56%
Education					
Less than HS	9%*	7%	7%*	9%*	4%
HS graduate	26%	34%	31%	31%	40%*
Vocational/tech school/some college/ associates	29%*	25%	25%	27%	24%
Bachelor's degree	21%	19%	21%*	22%*	14%
Post grad study/professional degree	15%	15%	16%	12%	17%*
Ethnicity					
White, non-Hispanic	55%	68% *	60%	70%*	74%*
Black, non-Hispanic	13%*	11%	12%	11%	9%
Other, non-Hispanic	1%	2%	3%	1%	2%
Hispanic	21%*	12%	16%*	11%	8%
2+, non-Hispanic	3%	2%	3%*	1%	2%
Asian, non-Hispanic	7%*	6%	6%	5%	5%
Income					
Less than \$40K	39%	36%	34%	32%	43%*
\$40K-\$75K	28%	27%	25%	27%	29%
\$75K+	34%	37%*	41%*	42%*	29%



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 <u>www.aarp.org</u> or follow @AARP and @AARPadvocates on social media.

About Interloq, LLC

Interloq provides innovative market research solutions to help brands, marketers and business leaders collect and harness the power of data to drive fast insights and decisions about their business. Nimble and efficient, we do things quickly without the drag of sizeable unneeded bureaucracy. Our primary consultants have been conducting market research for over two decades while always remaining on the pulse of modern technology to inform our research methods. Interloq is proud to be a woman-owned business based in Dallas, Texas. To learn more, visit www.Interloq.com.



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This research was designed and executed by AARP Research