

Digital Anthropology Report 2009

The Six Tribes of Homo Digitalis



University of
Kent

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Foreword

Digital technology is now such an important part of our lives that it is often difficult to imagine what life was like without it. In the space of just 10 or 15 years, the internet has radically altered the way we work, play, shop, study, keep in touch with friends and family, meet new people, express ourselves, and plan our social lives.

What this amounts to is a massive change in how we behave in the course of our everyday lives and how we interact with other human beings.

It was the desire to find out more about how digital technology has changed our behaviour that led us to create the TalkTalk Digital Anthropology Report. Put simply, we wanted to find out what homo digitalis really looks like.


There are some people who think that modern technology is always a bad thing, damaging human relationships and causing us to spend more time in front of a screen and less time face-to-face with other people. On the other hand, the technology behind the screen allows us to stay in touch with people who were previously very difficult or wholly impossible to reach.

The intention of the Digital Anthropology Report is to go beyond such arguments and take a much more objective, almost academic view of how this technology has altered our daily lives.

To achieve this we sent researchers into the homes of people around the UK to ask them questions about their attitudes towards digital technology and to watch them use it in situ. We also commissioned an anthropology expert to analyse the findings.

What we found was that homo digitalis actually consists of Six Tribes with very different attitudes, usage patterns and modes of behaviour.

Some of these tribes have embraced technology and put it at the centre of their lives – they would check their emails while eating dinner, think it perfectly normal to conduct in-depth relationships with strangers thousands of miles away via instant messaging or email, and skip sleep to play internet-enabled multi-player games late into the night.



“What we found was that homo digitalis actually consists of six tribes.”

Other groups, meanwhile, are more cautious. For them, “the internet” is a mysterious and rather frightening jungle. It’s carefully contained in a white box kept in one room of the house, and they only visit once every day or so, perhaps to email friends or family around the world, or to do some very basic online research.

It’s this variety of behaviour that we find so fascinating.

The Digital Anthropology Report has provided TalkTalk with some important insights into how our customers use the internet and how they have made it fit in with their lives. The findings can help us shape products and services that better appeal to the Six Tribes of homo digitalis and adapt to our changing behaviour in the future.

We have always prided ourselves on understanding our customers better than anyone else. We believe the Digital Anthropology Report is another sign of this commitment.

We hope you enjoy reading the report and find the results as interesting as we do.



Charles Dunstone
CEO of TalkTalk Group



Introduction

Internet provision in the UK has improved massively over the past 10 years, from old-style dial-up access to superfast broadband, with a huge range of choice for consumers.

In order to continue developing the best products for their customers, ISPs need to have an in-depth insight into how people use the internet and other communication tools and technologies.

With that in mind, TalkTalk teamed up with the University of Kent to conduct the first Digital Anthropology Report, in search of homo digitalis. The aim was to go beyond traditional research methods and get a true understanding of how technology fits into people's lives, by looking at people's attitudes and behaviours to technology and communications more generally.

What we discovered was that homo digitalis actually existed in a range of guises, as if in different stages of evolution. We found six distinct "clusters" of consumers, which we called our Six Tribes. Each tribe is comprised of consumers who look similar to one another in their attitudes and behaviours, but are different, in a meaningful and actionable way, to members of the other tribes.

We then developed profiles of the Six Tribes. The rest of this report is dedicated to bringing them to life.

Professor David Zeitlyn, University of Kent

"TalkTalk teamed up with the University of Kent to conduct the first Digital Anthropology Report"



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Methodology

The research was developed by using a mixture of qualitative and quantitative research methods.

TalkTalk started with focus group sessions with a twist. These “friendship groups” differed from traditional focus groups in that the participants in each group knew each other already. We recruited a lead participant and then asked that person to invite members of their “communications circle” – that is, family and friends who they kept in touch with on a regular basis.

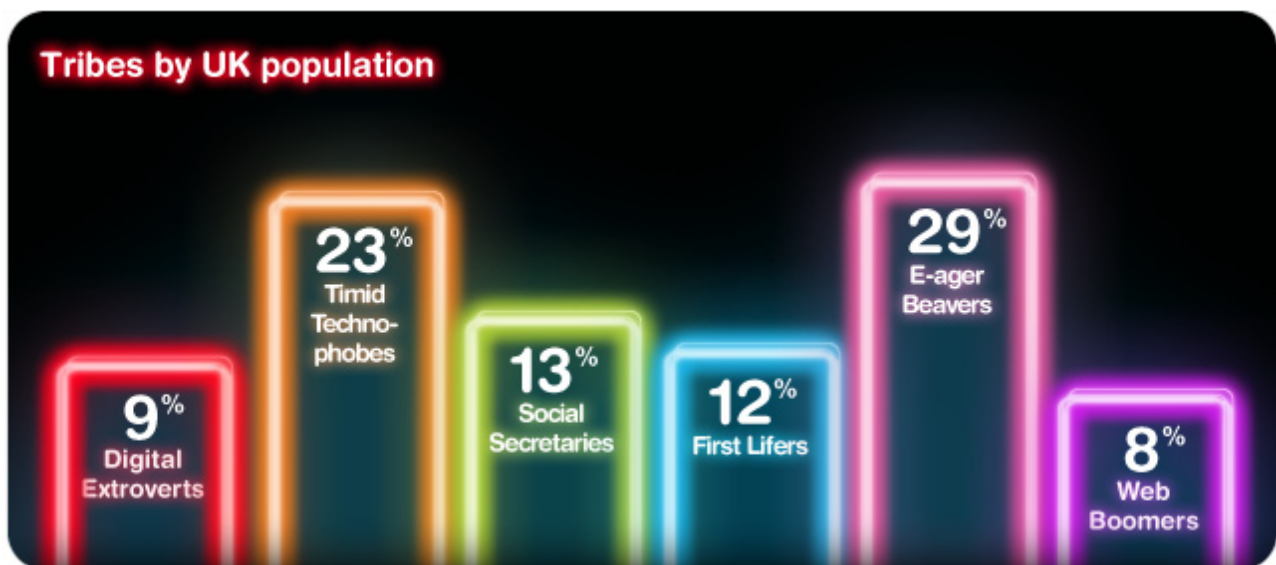
We were looking to understand how these circles of people used technological and non-technological means to manage their lives.

The findings from these groups then helped form the basis of a quantitative survey, the findings of which would shape the final report.

The quantitative survey was completed by around 2,000 consumers who are either the key decision maker or have a large part to play in how a household makes decisions on the communication tools and technologies that it purchases.

The survey asked a mix of questions about their technology usage plus a series of attitudinal questions, some of which were not directly related to technology and communications. This enabled us to get a more rounded understanding of the respondents.

The Six Tribes of Homo Digitalis - who are they?



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Who are they?

- 1.5 million adults (9.2% of universe)
- 46% Female
- 54% Male
- 55% Under 34
- 37% Single
- 40% have children
- Avg income £39k (National avg £30k)



46%

54%

The Six Tribes of Homo Digitalis

Digital Extroverts

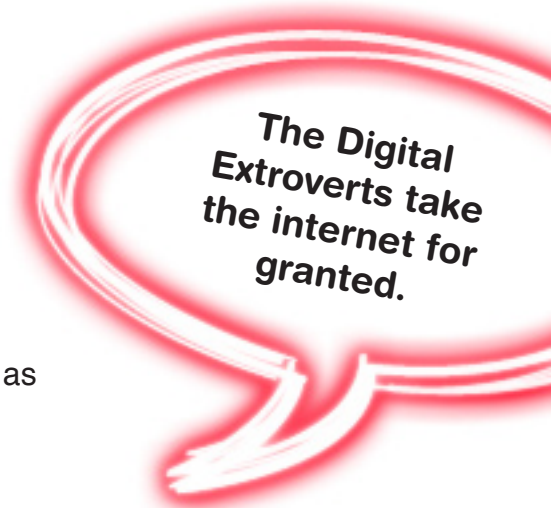
Digital Extroverts are particularly preoccupied by converged devices – where mobile technology and the internet come together in a single product, for instance BlackBerries or iPhones.

This is about convenience first of all: they demand high bandwidth, whenever and wherever they are.

Technological convergence doesn't stop their fascination with new devices as they're launched, but to attract the Digital Extroverts the ability to interconnect and share data is a prerequisite.

Not surprisingly, the Digital Extroverts take the internet for granted and revel in what it enables them to do. They use mobile technologies that involve regular updating and interaction – just like the technology, the Digital Extroverts are “always-on”. To them, regularly updating their online profile is as much a part of their daily routine as brushing their teeth.

But they share more than just their Facebook status. A Skype video call includes sharing photos, recipes and other documents. They follow their friends and family online, seeing their holiday snaps as they are taken, and they often upload their own photos in close to real-time. They are also highly likely to blog.



55%
Under 34

37%
Single

40%
Have Children

£39K
Avg £30k



The Six Tribes of Homo Digitalis

Digital Extroverts

Pen portrait

Giles, 37, advertising executive from West London

I use the internet in my work life primarily for speed and ease. I can remember the days of 14.4k modems but now it's an absolutely indispensable tool. Broadband's got faster and I've used it more. And it's gone from being just inside my home to being on the street.

I've got a freelance programmer I love working with in Canada. He doesn't like communicating on the phone, so we do everything through either MSN or Skype – and text on Skype at that. One person I work with will prefer MSN, somebody else will prefer Skype, somebody else will prefer using Twitter and sending me messages that way. But without the internet for any great length of time – effectively I'd actually start losing money.

There are literally some friends I have who will only organise a party through Facebook and there'll be no other form of announcement to it, no other way to RSVP. If you phone them they think you're odd, and they simply want to communicate via Facebook.

But, you know, we lived without the internet beforehand. But then again we also lived without penicillin . . .

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Who are they?

- 4 million adults
(23% of UK adults)
- 47% Female
- 53% Male
- 54% Over 55
- 22% Living alone
- 24% have children
- Avg income £26k
(National avg £30k)



47%

53%

The Six Tribes of Homo Digitalis

Timid Technophobes

Timid Technophobes are far less affected, on the face of things, by technology changes than the other groups. And despite how far we think homo digitalis has come they still represent more of the population than all but one other tribe – at almost a quarter of Britons (23%).

They use mobile phones, but are wary of the convergence represented by smart phones, since they don't see themselves as using most of the features. They want phones to be easy to make calls from. If they want to send an email they'd rather use a full sized keyboard and if they want to take a photo they'll use a proper camera.

Armed with only limited internet skills this group will only use it when they really need to. Many of them will be adept enough to send and receive emails, but they still prefer to use pen and paper and prefer to send and receive letters.

In truth Timid Technophobes believe that the internet is getting out of control. The abundance of information means that they just don't know what to trust. In their opinion the quality of content on the internet needs regulating.

They are also less than impressed by blogging or tweeting, regarding it as something for people with too much time on their hands. And as for social networking, they think they have enough friends already, and would rather meet up face to face than over the internet.

As technology becomes more ubiquitous we can expect the number of Timid Technophobes to decrease over time. How quickly this will happen depends largely upon how quickly the 'digital divide' is closed by the educational activities undertaken by the government and other bodies.

54%
Over 55

22%
Living alone

24%
Have Children

£26k
Avg £30k

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The Six Tribes of Homo Digitalis

Timid Technophobes

Pen portrait

Doris, 69, retired from Dorset

We bought a household computer a couple of years ago. I use it primarily to stay in touch with my three kids in their twenties, one of whom is at university and the other two working abroad.

My husband taught me how to use the internet – until recently he has used it for work. The main use I have for it is email although in truth I'm a letter person. I check my email everyday to send notes to the kids. I also visit the odd news site like the BBC and send interesting news stories to one of the seven people in my address book.

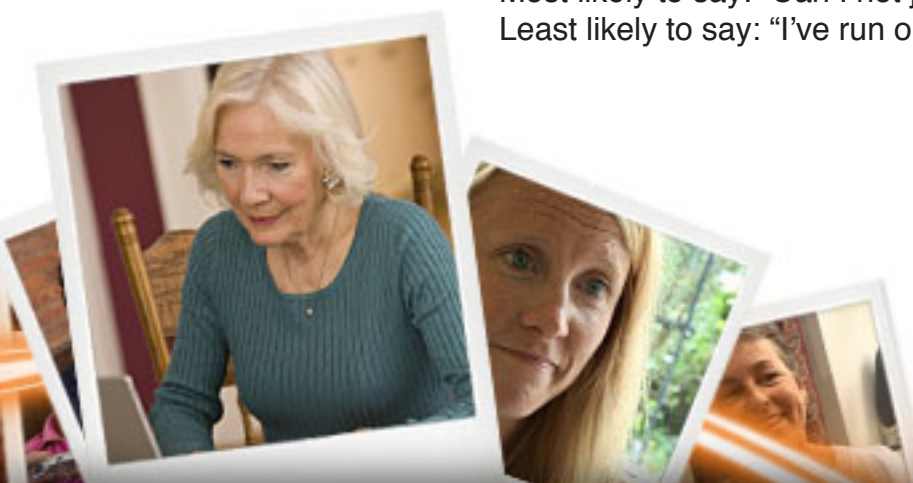
My kids laugh at me when I worry about the safety of the internet. I read so many stories about credit card details being stolen, it's scary. I would never shop online and don't like to think of my children doing it as often as they do.

I also don't understand Facebook and things. I mean, anyone could see your photos and details. I sometimes think the internet is getting out of control, maybe it's time some limits were imposed.

The kids get frustrated when they come round because they say our internet speed is painfully slow. I don't notice it and to be honest I'm not bothered about it being any faster, it gives me time to catch up! I have no idea if we have broadband or non-broadband, my husband sorts that out, as long as I can log on for emails that suits me fine.

Most likely to say: "Can I not just book on the phone?"
Least likely to say: "I've run out of memory on my iPod"

"Can I not just book on the phone?"



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Who are they?

- 3.4 million adults (19% of UK adults)
- 67% Female
- 33% Male
- Average age 45
- 64% Live with partner
- 36% have children
- Average income £32k (National avg £30k)



67%

33%

The Six Tribes of Homo Digitalis

Social Secretaries

Social Secretaries are wholly pragmatic when it comes to embracing technology. Comprised primarily of busy women, faced with the toils of juggling a hectic family, work and social life, if something can make their life easier then they're happy to use it.

They are too busy to play and experiment with the latest gadgets. However they're all for convergence as it means they have fewer devices to learn and use. They are also happy that it will be easier to text, use IM or even phone their spouses, children or old school friends.

They are too busy to play and experiment with the latest gadgets.

Social factors are important in this group: they value their friendships and may use the technology to help them keep in touch. They are the writers of round robin Christmas letters which are now sent as email attachments rather than posted with a card.

They value their social commitments and acting as 'secretary' to a friendship group will circulate the documents by email, or by posting to a group webpage (e.g. using Facebook or GoogleDocs).



45

Average age

64%

Living with partner

36%

Have Children

£32k

Avg £30k

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The Six Tribes of Homo Digitalis

Social Secretaries

Pen portrait

Emily, 31, works in marketing in London, currently on maternity leave

I've just become a new mum and I'm on maternity leave, so I'm relying on the internet to keep me organised and keep me on track. It allows me to feel like I still have access to the outside world!

My favourite piece of technology is most definitely my BlackBerry. I used to drive my husband nuts when I was constantly on it when I was working. I just use it the whole time – I've put my Yahoo emails through it so I get my social stuff as well as checking up on what's going on in the office.

I tend to go online around three times a day – first thing in the morning, at lunchtime when my baby has a sleep, and in the evening as well as when my husband gets back.

I think the best thing about the internet is the wealth of information there is to hand – especially as a new mum. If I hear my baby making a funny noise and want to know what it is, I can go straight onto the internet to find out what it might be. When I was pregnant I used to go online to find out what I could expect as well! It's great that this is all there at your fingertips.

I've also got a friend in America who's expecting a baby any day, so I Skype her all the time so she can actually see what my daughter looks like and how she's growing and I can see how her bump is growing!

Who are they?

- 2.1 million adults (12% of UK adults)
- 37% Female
- 63% Male
- 47% under 34
- 20% Live with parents
- 34% have children
- Average income £31k (National avg £30k)



37%

63%

The Six Tribes of Homo Digitalis

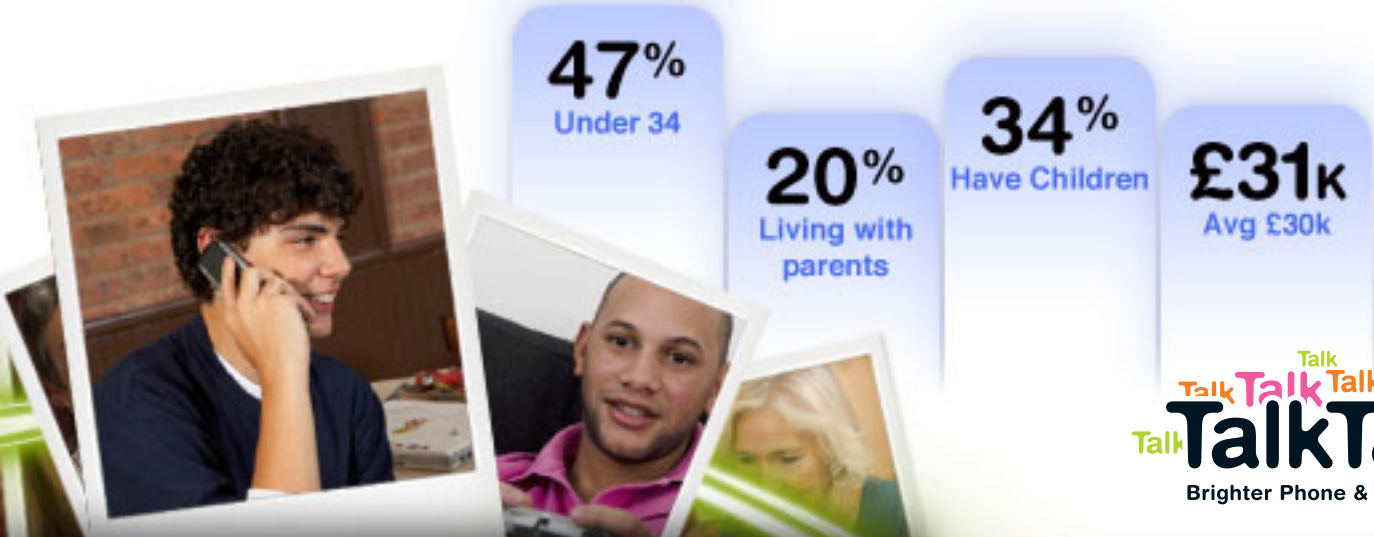
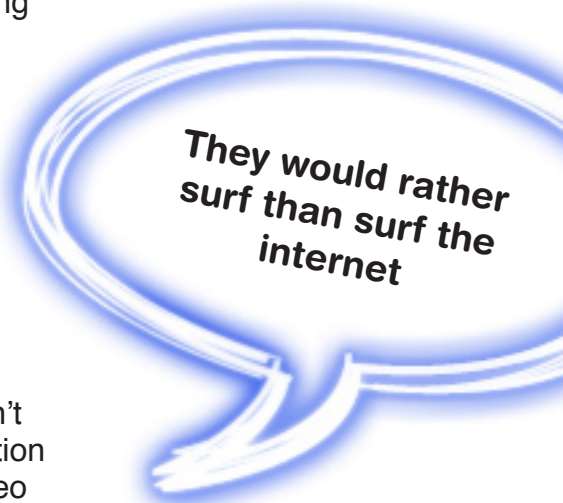
First Lifers

Remarkably, First Lifers had the lowest levels of email usage among all of our tribes, at just 51% - far lower than even the Timid Technophobes, who were at 70%.

For First Lifers, life is there to be lived, especially outdoors. But while they 'would rather surf than surf the internet' they may actually be doing both. As smart phones become more widespread their users may become internet users without realising it, using Skype, Shazam or Google in the pub or on the beach to find out where the next party is or to keep in touch with friends.

A First Lifer may be a mobile broadband user, and prefer to keep using their phone in the house. It won't bother them how the internet connection works, they just want the music, video and the online gaming.

They take for granted the information on GPS maps that show nearby bars and restaurants. Augmented reality and converged services may mean that when people exchange phone numbers they get access to extended Facebook pages, and when phoning someone additional information about them becomes accessible via the screen (of their mobile or home computer). To First Lifers, it doesn't matter from where or how that information comes.



Who are they?

- 5.1 million adults (29% of UK adults)
- 47% Female
- 53% Male
- 20% Aged 16-25
- 17% Live with parents
- 30% have children
- Average income £30k (National avg £30k)



The Six Tribes of Homo Digitalis

E-ager Beavers

The E-ager Beavers are the largest tribe by quite a distance, with 29% of the UK adult population. While they use the internet heavily, it is not quite as integral to their work and social lives as it is for the Digital Extroverts.

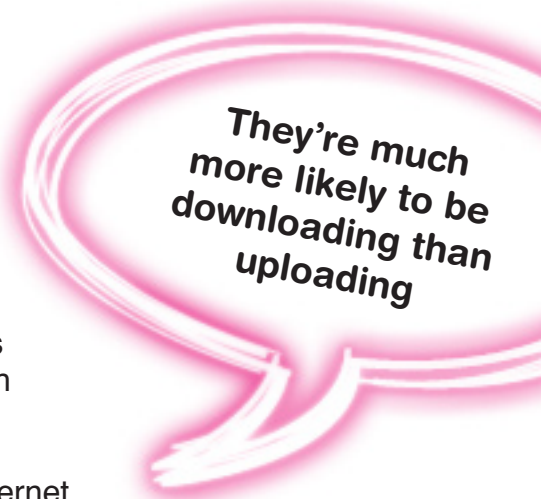
In particular, the biggest differences between them and the Digital Extroverts are social: a combination of wealth and confidence.

They're much more likely to be downloading than uploading, and lack the confidence or the drive to get involved with uploading their own content or producing their own blogs (which is what sets them apart from the Digital Extroverts).

Primarily, the E-ager Beavers like the way that the internet connects them to new things (such as music, TV shows or music clips) or to existing friends through social networks. They tend not to make new friends online.

Convergence suits the E-ager Beavers, as they will have fewer things to worry about and they can get on with their downloading and games playing.

They are more passive users of the internet than the Digital Extroverts are, though there are some signs that this is beginning to change as they begin to experiment and get used to new technologies.





The Six Tribes of Homo Digitalis

E-ager Beavers

Pen portrait

Andy, 30, IT sales manager from Harpenden

I've always been interested in 'stuff' and finding out about things. That's why I love the internet, because if I want to know something I can find out right now with no messing about.

I like watching YouTube clips and looking at people's holiday photos but I don't feel confident enough to start sharing my own stuff yet. I don't think Twitter's for me – I just don't feel the need to share every thought I have!

I like the fact that the internet enables me to keep in touch with as many people as I do. There's always someone on MSN or Facebook Chat who I want to chat to. Facebook is my preferred social networking tool.

I saved up for a while to buy a smart phone – and it's the best thing ever! I'm always downloading video and music on it.

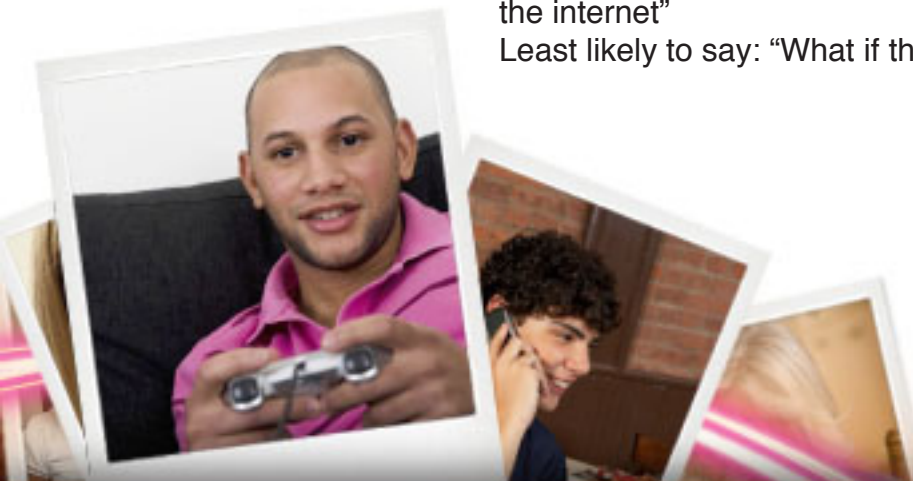
Good deals get me going and that's why I always have a rummage on eBay when I'm looking to buy something. Before I buy anything though I do check reviews to make sure I'm getting the best version.

I'm always interested in the next big thing in technology and I like to check out gadget websites and keep up to date – though I browse far more than I buy.

If I didn't have the internet for the day I guess I'd just flick through the cable TV channels, but I think I'd struggle after a few hours!

Most likely to say: "Saw that film already last week, streamed it from the internet"

Least likely to say: "What if they steal my details?"



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Who are they?

- 1.4 million adults
(8% of UK adults)
- 42% Female
- 58% Male
- 59% Over 55
- 32% Retired
- 30% have children
- Average income £31k
(National avg £30k)



42%

58%

The Six Tribes of Homo Digitalis

Web Boomers

Unlike Timid Technophobes, Web Boomers especially appreciate the internet's infinite data resources.

The fact that they can quickly and efficiently access a wealth of information on health, hobbies and history, as well as news and current events - all from the comfort of their home - fascinates them. Increasingly the internet is taking over from the local library as their primary source of information and entertainment.

Older and wiser than many of the other groups, they accept and appreciate that just because they've read it on the internet doesn't necessarily make it true, and so they tend to stick to a regular set of trusted online sources and they still read the newspaper every day too.

Web Boomers have a lot of free time and they like to make sure they spend it doing the things they enjoy. And for many that certainly doesn't include pushing a trolley around the local supermarket, nor does it include queuing in the bank. This tribe are fully fledged online shoppers and bankers.

Careful with money, they like to read online reviews before making a purchase. They also love using price check services such as Kelkoo and GoCompare to make sure that they are getting the best price on the market.

This group is not going to be sold on social networking, they would much rather use the landline to stay in touch with distant friends and family. That said, they're getting to grips with services such as Skype as the video element enhances the traditional phone call and enables them to feel closer to grandchildren as they grow up.

59%
Over 55

32%
Retired

30%
Have Children

£31k
Avg £30k

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The Six Tribes of Homo Digitalis

Web Boomers

Pen portrait

Jan, 56, teacher from Essex

I've been using the internet now for about 12 years. I do a lot of internet searching for my job and also in my leisure time, doing things like holiday searches and bookings.

I shop online too – I've used Amazon a number of times and bought gifts to send people back home in Australia, so I can order something here and it's delivered from the Australian merchandise centre.

I also use Skype when I'm talking to people back home, and since the advent of the webcam I'm able to now see the people I'm talking to which has made a big difference as it certainly brings people a lot closer. It's much easier to keep in contact with people when they're on the other end of – well – almost a phone, except it's a microphone and it's a camera and you're actually seeing the people you're talking to.

*They book holidays
and shop online*



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Future predictions

How will the six groups fare over the next 10 to 20 years? Here are four predictions from Prof. David Zeitlyn:

1

Our 'tribes' will evolve as technology becomes increasingly ubiquitous, with some merging, others disappearing altogether and new ones emerging

Social changes will continue and technology will both reflect and promote these changes. As we can already see with the Social Secretaries, the job of motherhood is essentially the same, but the way it is done is different, as technology allows new methods and processes to thrive.

2

A digital elite will emerge – and social networking will be more important than social class

Our research identified two groups who use the internet heavily – the Digital Extroverts, who have made the internet an integral part of their work and social lives, and the E-ager Beavers, who use the internet frequently but have less confidence and financial means than the Digital Extroverts.

As time goes by we expect some E-ager Beavers to become Digital Extroverts (though others may choose not to – not from lack of confidence, but because they are naturally less outgoing). The enlarged group of Digital Extroverts could well become a digital elite – a grouping revelling in paid-for services, faster speeds and greater bandwidth, while the majority of users are forced to rely on older networks and technologies.

In this digital elite, your willingness to embrace technology and integrate it into your life will dictate your success in life far more than your social class will. As class structures change quickly, the extent to which people use social networking and promote themselves online will become more important in determining their careers than what school or university they went to.

3

The Digitally Excluded will disappear but will be replaced by Digital Refuseniks

At the moment, people not using the internet are largely doing so because they don't have the skills or the equipment to do so. As costs get lower and education levels increase, such explanations will more or less disappear.

However, scepticism towards technology will continue, so it's conceivable that a new group – dubbed “digital refuseniks” – will emerge in their place. This group could use the internet if it wished, but have taken a social or moral stance against its pervasiveness in modern life. To a greater or lesser extent, they are Luddites – preferring the old-fashioned ways and worrying about the impact technology has on society – and may become a stubbornly resistant tribe in the future. These are the sort of people who refuse to use Tesco Clubcards because they don't want their shopping to be monitored.

4

The rise of mobile access will set our tribes free

Over the next few years, the internet will become increasingly available on the go via mobile devices that will effectively be mini-computers, and connected via ubiquitous wireless signals in the same way that mobile phones are today. Already, First Lifers are taking advantage of the early stages of this technology, by using mobile dongles or iPhones.

As this technology comes down in price, our tribes will be able to benefit from the internet's store of information and entertainment almost anywhere they go. Activities undertaken in public spaces – such as shopping or eating out – will increasingly involve interaction with and be enhanced by technology. While this will allow many of our tribes to escape the confines of the office and give them more social freedoms, it will pose problems for Timid Technophobes and may force them to overcome their fears of technology.

**Professor David Zeitlyn,
University of Kent**



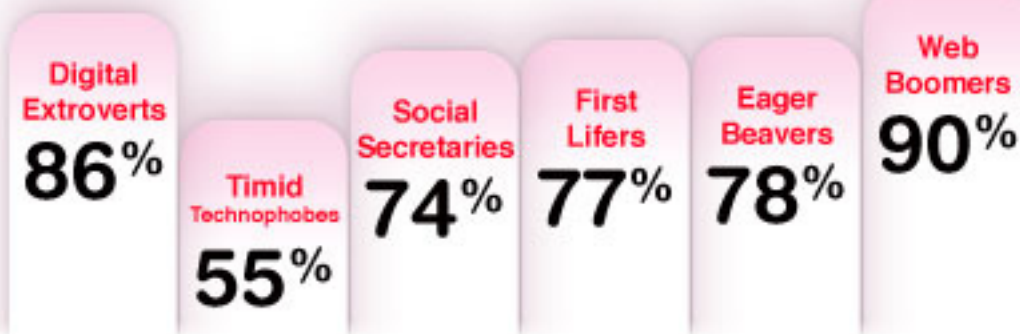
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Detailed Findings

What technologies do tribes currently have in their homes?

Laptop



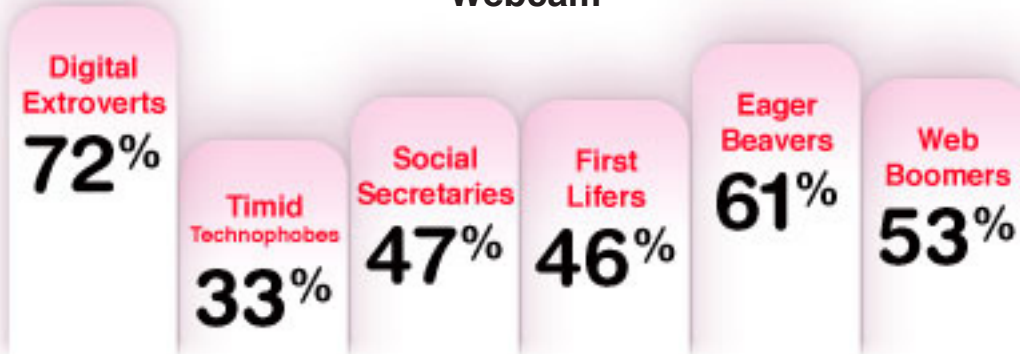
Blu-ray player



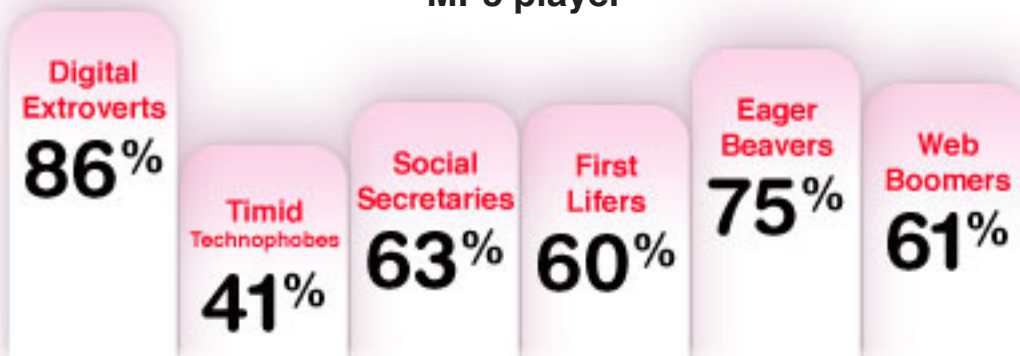
Detailed Findings

What technologies do tribes currently have in their homes?

Webcam



MP3 player



Detailed Findings

What do the tribes use the internet for?

Downloading films



Downloading music



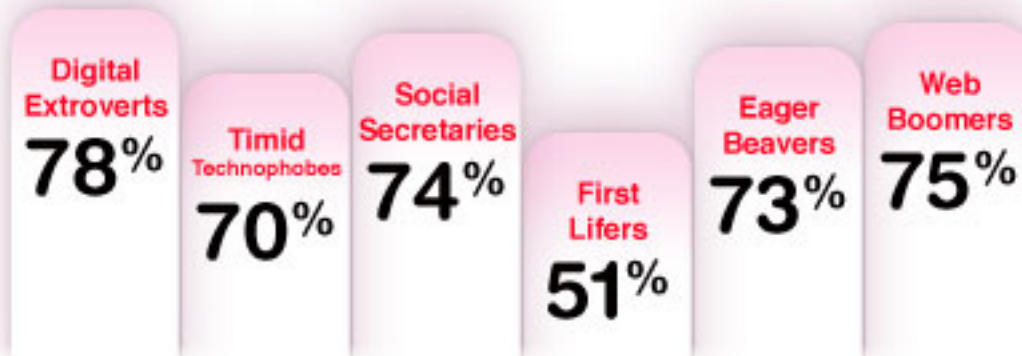
Social networking



Detailed Findings

What do the tribes use the internet for?

Using email



Reading blogs

