

# Hi Digital Study: Comparative Research Report

Closing the Confidence Gap:  
How Older Adults Navigate the  
Digital World

Commissioned by: Vodafone Foundation | Hi Digital Programme  
Report compiled by OKC, Research conducted by IPSOS



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# Foreword

At Vodafone Foundation, our mission is to connect for good. I believe deeply in the power of technology to change lives, particularly across our three core focus areas: **driving inclusion through digital skills, tackling harm and abuse, and building resilience in times of crisis.**

This report, **Closing the Confidence Gap: How Older Adults Navigate the Digital World**, is an important step forwards in our work supporting **digital skills and inclusion**. In today's world, access alone is not enough. Confidence is just as important. And when confidence grows, it is remarkable how quickly people seize the opportunity to connect, learn, and thrive.

Yet as services, communities and public infrastructure move increasingly online, there is a growing confidence gap across generations. Too many older people feel overwhelmed by the pace of digital change and unable to keep up.

This is why we created Hi Digital – our award-winning, community based programme supporting older adults to build confidence, stay safe online and maintain social connection. Delivered through trusted charities, community partners and drop-in sessions at Vodafone stores, it combines group learning with one to one support rooted in real life, local relationships. To date, Hi Digital has directly supported over 500,000 older adults and reached more than 1.5 million people.

To ensure Hi Digital continues to respond to real needs, we commissioned Ipsos to carry out a large scale study of 6,000 older people across six European markets. The findings are clear; while older adults are more connected than ever, many still lack confidence, fear making mistakes and feel technology is changing too fast. Loneliness is also rising, reinforcing the fact that digital tools can support, but never replace, trusted human relationships.

Importantly, the research also shows us what works. Older adults want to learn in supportive, social environments. They value face-to-face learning, community based programmes and intergenerational exchange. Above all, they want encouragement, not stereotypes, and learning spaces that put confidence before complexity.

This report brings together those insights to inform the future of Hi Digital and to help shape wider approaches to digital inclusion. If Europe is serious about leaving no one behind, we must widen the conversation beyond infrastructure. By investing in confidence, community and human centred design, we can unlock the potential of an ageing population.

The infrastructure revolution is well underway. The confidence revolution must now begin.

**Lisa Felton**



Managing Director, Vodafone Foundation

# Background

This comparative research report unifies data from the large-scale Ipsos quantitative study completed by Ipsos in November 2025. This body of work explores digital literacy, confidence, learning behaviours and loneliness across six markets: Ireland, United Kingdom, Germany, Netherlands, the Czech Republic and Romania. The study was commissioned to ensure that Hi Digital has the data and information across all markets to deliver to the best of its programmatic capability, for every participant, now and into the future. This report delivers a synthesised overview from the assessment of global and market level reports, capturing directions and trends across markets for the ongoing and future development of Hi Digital.



# Executive Summary

Digital technology is now central to daily life for people aged 55+ across the six surveyed markets.

**With 91% using digital devices daily, smartphones, computers and tablets are embedded in everyday routines.**

However, while usage is high, confidence varies. Older adults feel comfortable with familiar tasks but uncertain when facing new tools. Learning tends to happen gradually through personal networks: **51% prefer in person solutions, 39% rely on family or friends, and 29% choose structured in-person learning.** Research shows loneliness is not constant for most older adults, who typically rely on offline social activities to stay connected. Digital tools should therefore support rather than replace real world relationships, helping people communicate and organise in person interactions.

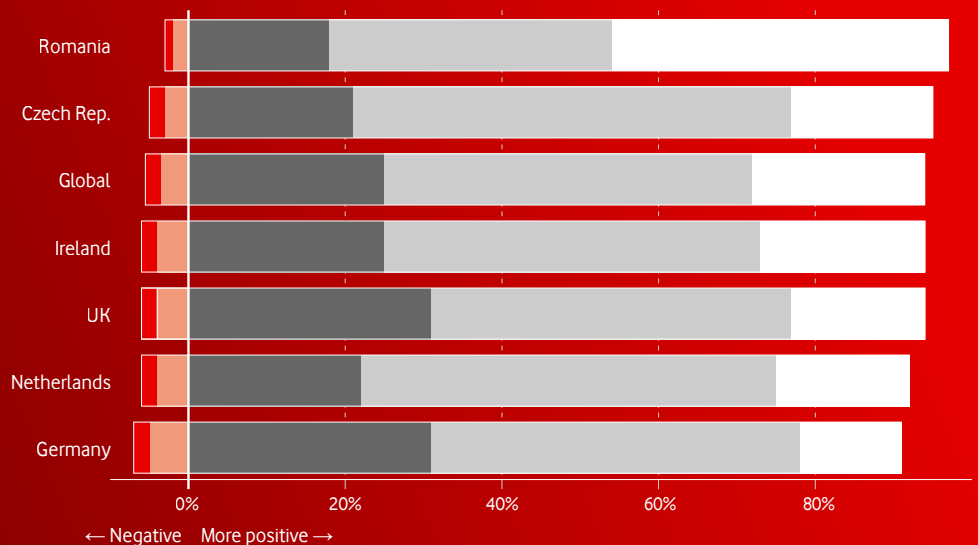
Patterns fluctuate across markets. Digitally mature countries like the UK, Germany and the Netherlands show high usage but pockets of uncertainty. Ireland stands out for strong enthusiasm for community based learning. The Czech Republic and Romania show wider variability in confidence, highlighting a need for more structured programmes.

Survey results point to supportive, social learning environments as essential for digital learning. Delivering consistent, confidence building programmes and collaborative learning experiences that fit naturally into the lives of people 55+ is the way forward. **With over 70% of older adults positive about using technology,** consistent support can enhance independence, relationships and wellbeing, ensuring digital skills and real world experiences work together for healthier, happier ageing.



## How digital technology is perceived by 55+

I love it – it's very enjoyable  
  I like it – mostly positive experiences  
  It's okay – I have mixed feelings about it  
 I don't really like it – I have trouble using it  
  I don't like it at all – it is too complicated for me



Base: All participants; n=6,000; shown without don't know / prefer not to answer · Sorted by overall positivity  
 Question Q1: "How do you feel about using digital technology (e.g smartphones, tablets, apps, the Internet)?"

# Methodology & Age Analysis

The study was commissioned to better understand how people aged 55+ experience their digital world on a day-to-day basis, and to understand how digital engagement relates to social connection and experiences of loneliness. A consistent methodological approach was applied across all participating markets, enabling authentic comparisons between markets.

## Research Design

The study was conducted using a quantitative survey methodology, allowing for a structured understanding of behaviours, attitudes and experiences across markets. By applying a common survey framework across all six markets, the study provides both a shared market perspective, and overall insight into global activity.

- The study included six markets: **United Kingdom; Ireland, Germany, Netherlands, Czech Republic and Romania.**
- In each market, **1,000 respondents aged 55+** participated in the survey, resulting in a total sample size of **6,000 respondents.**
- Fieldwork was conducted in **November 2025** through Ipsos' established online research panels.



## Age Group Insights

Within the 55+ population digital engagement varies across age groups:

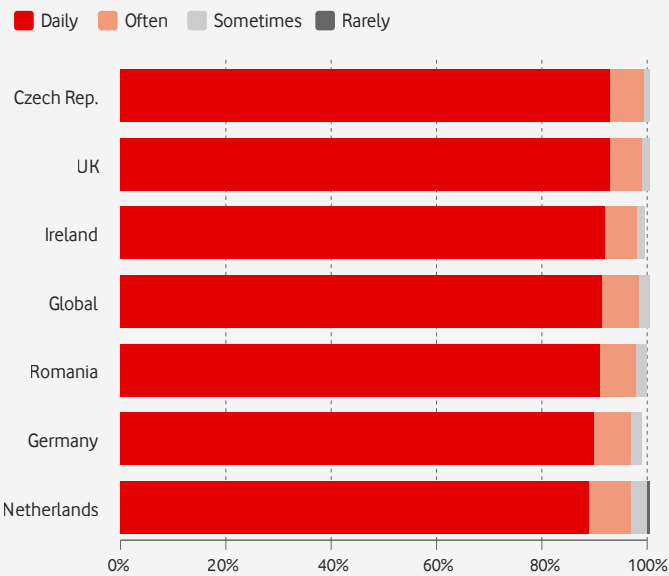
- Adults aged **55–64** are generally the most confident digital users. Many have used digital tools throughout their professional lives and are comfortable navigating online environments.
- The **65–74** group demonstrates more varied experiences. Some individuals remain highly confident digital users, while others rely more heavily on assistance from family members.
- For those aged **75+**, digital engagement can become more challenging. While some older adults remain active users of digital technology, others find adapting to new digital environments more difficult.

These differences highlight the importance of designing Hi Digital learning opportunities that accommodate a wide range of digital experiences, and to keep delivering for each age demographic at their level and pace.

# Global Overview of Key Findings

Across all six markets, digital engagement among people surveyed aged 55+ is extremely high, with **91% of respondents using digital devices daily**, even in the 75+ age demographic. The majority of respondents report owning at least one digital device, and many own several.

## Most people use digital devices daily



Base: Participants which own at least one type of digital device, n=5990; shown without don't know / prefer not to answer · Sorted by daily usage  
Question Q3: "How often do you typically use your digital devices?"

**Smartphones have become the most widely used device, often serving as the primary tool for communication, accessing news and information, and day to day tasks.**

Public and private services have increasingly moved online, with participants recording finance at 52%, and public services at 48% as areas where digital skills are needed. Widespread access, ownership and service migration reflect broader societal trends where digital technology has followed and become an integral part of daily life. Globally, **56% of the surveyed adults report that they feel included in social interactions when using digital tools and platforms.**

**At the same time, they feel less comfortable navigating new applications or unfamiliar digital environments, with 55% globally reporting that the pace at which digital technology moves is too fast.**

## The pace of digital innovation is too fast for many

	Positive attitudes		Anxious about pace		
	I am <b>excited</b> about how quickly digital technology is evolving	The world has become a <b>better place</b> because of digital technology	I experience the pace at which digital technologies evolve as <b>too fast</b>	I <b>feel left behind</b> when I think about the pace with which digital technology is evolving	The pace at which digital technology has changed in recent years <b>scares me</b>
Romania	78%	58%	50%	48%	34%
Global	59%	39%	55%	45%	43%
Czech Rep.	52%	48%	56%	52%	39%
Germany	58%	20%	52%	32%	38%
Netherlands	44%	30%	61%	36%	33%
Ireland	42%	45%	58%	49%	55%
UK	32%	33%	55%	52%	53%

% who agree

Base: All participants; n=6000; shown without don't know / prefer not to answer · Sorted by positive sentiment score  
Question Q11: "How much do you agree or disagree with the following statements?"

# Four Key Areas Emerge Across Markets

## Use and Confidence

The gap between use and confidence is an important finding across all markets. Here we find that while digital adoption is widespread with **89% open to learning new digital skills**, digital confidence remains unstable. Globally, confidence is low around issues like understanding how apps or websites work, with **69% reporting making mistakes or low confidence on digital devices**. Participants report measures to feel more confident about changes in technology are helpful, with **53% valuing clear and simple usage explanations**, **47% needing better privacy and security features**, and **36% requiring better information about risks**.

## Loneliness

Experiences of loneliness provide important context for understanding digital engagement globally. While most respondents did not report feeling lonely on a regular basis,

**67% agree that loneliness has increased in their age demographic in recent years.**

When loneliness is felt, respondents most often rely on activities that strengthen social connection in the physical world. Spending time with friends and family, participating in hobbies or simply getting outdoors remain among the most common ways people maintain a sense of wellbeing. Connecting with others in online communities is extremely low, **with a global average of 5%**, although Czech Republic and Romania are tracking higher in terms of using online content at **28% and 40% respectively**.



## Older People Experience Stereotype

Globally, a combined

**68% of older adults said that they experience the assumption that older people struggle with technology**

either 'fairly often' or 'occasionally'. This is reflected across markets (Netherlands **72%**); UK (**65%**); Germany (**62%**); Romania (**65%**); Ireland (**67%**) and Czech Republic (**77%**). This data suggests that there is a need for public understanding that older people are on a digital journey, and that they should be encouraged and supported as they adapt and progress in a new environment.

## Concerns Around Digital Services

**There remains a broad concern around personal information sharing online.**

Globally this figure sits at **62%** with The Netherlands tracking similarly at **59%**, Germany at **54%** and Czech Republic at **58%**. Ireland, Romania and the UK are much higher than average with over

**70% particularly concerned about scams and personal information misuse.**



# Recognising Differences Between Markets

While many findings are shared across countries, important differences emerge when comparing markets.

- In the United Kingdom, Germany and the Netherlands, digital engagement among older adults is particularly high. These countries benefit from well-developed digital infrastructure, access and widespread integration of online services into everyday life. Older adults in these markets often use digital tools frequently and for a variety of purposes, from communication and entertainment to managing practical pieces. However, even in these digitally advanced environments, confidence levels vary.
- In Ireland, those surveyed show similarly high levels of digital engagement but demonstrate a strong openness to learning new skills at the highest level across markets at **91% above the global average of 89%**. Many express interest in opportunities that allow them to improve their digital knowledge in in-person environments, **with recommendations from family or friends at 49%**. **Personal contacts remain the most trustworthy at 95%**, with **community based sources at 85%**.
- In contrast, the Czech Republic and Romania show greater variation in digital confidence among older adults. While digital device ownership is increasing and many actively use digital tools, a larger proportion report feeling uncertain about their digital abilities. **43% reporting a lack of understanding of apps or websites, and a further 36% report being afraid of making mistakes**. In Czech Republic **62% of older adults in the 75+ category report feeling left behind with the pace of digital technology**.



# Market Trends and Implications for the Hi Digital Programme

Looking across the six markets, several clear trends emerge in how older adults engage with digital technology. While the overall landscape is one of growing digital participation, the way older adults approach technology and the confidence they feel using it varies between countries. One of the most encouraging findings across the research is that older adults are already far more digitally engaged than is often assumed. Communication is one of the most common motivations for digital use. Digital technology is also increasingly used for practical everyday tasks, including accessing information, managing appointments, and carrying out administrative activities such as online banking or paying bills.

## Market Specific Trends

### UK Germany & Netherlands | High Usage | Confidence Gaps

In markets such as the UK, Germany and the Netherlands, digital technology is deeply embedded in everyday life. Public services, banking systems and communication platforms are all highly digitised, meaning that older adults are often required to engage with digital tools as part of routine activities. However, it is still important to note that despite this high level of engagement, research shows that many older adults still experience moments of uncertainty when interacting with new technologies. Software updates, new applications or changes in digital interfaces can create frustration, even among individuals who use digital tools regularly. This highlights an important insight: digital maturity at the societal level does not automatically translate into digital confidence at the individual level.

### Ireland | Strong Curiosity and Openness to Learning

Ireland stands out as a market where older adults demonstrate a particularly strong willingness to engage with digital learning opportunities. Respondents frequently express curiosity about technology and a desire to continue developing their digital skills. This openness suggests that many older adults see digital learning not simply as a necessity, but as an opportunity for personal growth and social engagement. Community-based learning environments appear particularly well suited to this market. Many respondents value opportunities to learn alongside others, where they can ask questions, share experiences and build confidence together.

### Czech Republic and Romania | Greater Need for Structured Digital Support

Research suggests that the digital experience of older adults in the Czech Republic and Romania differs somewhat from that of the Western European markets. While digital adoption is growing steadily in these countries, levels of digital confidence among older adults tend to vary more widely. In these markets, digital inclusion initiatives may need to focus more strongly on foundational digital skills and structured learning opportunities. Programmes could focus on helping participants understand how digital devices work, navigate basic internet functions, access key digital services such as healthcare platforms or government portals and building confidence using messaging or video communication tools.

# Shared Themes and Trends | Similarities Across Markets

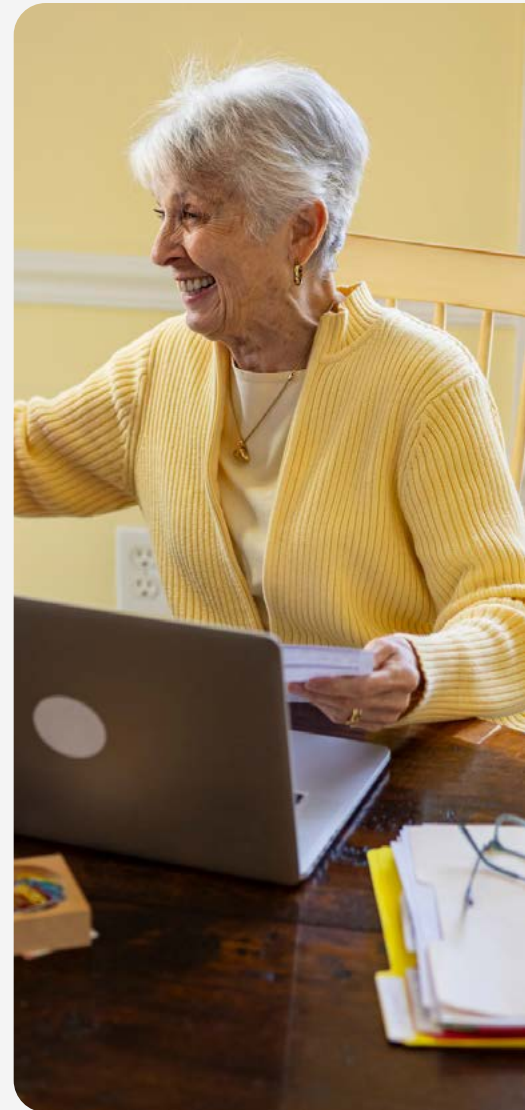
While the six markets included in this study differ in terms of digital infrastructure, culture and levels of digital confidence, several themes emerge consistently across all countries. When the data is assessed in the round, these themes paint a picture of a generation that is already engaging with technology but still navigating toward greater confidence and digital independence.

Shared themes emerge around key areas including:

- **Digital Technology as Already Part of Everyday Life:** One of the most striking findings is how firmly digital technology has become embedded in the daily lives of older adults. In each country, the majority of respondents report owning and using digital devices regularly. Smartphones have become central tools for communication, information and everyday organisation.
- **The Role of Social Learning:** Across markets one trend emerges very clearly, older adults are more comfortable learning about technology when they can do so in a supportive and social environment. Many respondents report learning digital skills informally through conversations with family members or friends.
- **Confidence Develops Gradually Through Experience:** Another consistent theme is the gradual way in which digital confidence develops. Few respondents describe themselves as having learned digital skills in a formal or structured way. An organic learning process means that digital confidence often grows slowly over time. This pattern appears across all six markets, regardless of the overall level of digital maturity within the country.
- **Human Support Remains Central to Digital Learning:** Many respondents describe learning digital skills through personal relationships. 58% of respondents state they would like to have more exchange with people in a different age group. Many respondents describe feeling more confident experimenting with technology when they have someone they trust to guide them. In addition to building digital skills, these environments can also help strengthen social relationships and address both digital inclusion and social connection simultaneously.



- **Technology Supports Connection but Does Not Replace It:** Another shared theme across markets is the way older adults view digital communication. Research suggests that digital communication should be complementary to rather than a replacement for face-to-face interaction. Digital tools therefore should be valued not as substitutes for social interaction but as ways of supporting and enabling relationships.
- **Strong Curiosity About Technology:** One of the most encouraging findings across all markets is the level of curiosity older adults express about digital technology. 89% globally describe themselves as interested in learning new digital skills and exploring new tools. 56% report feeling included in social interactions when using digital tools. Many respondents also describe satisfaction in mastering new digital skills or becoming more independent when navigating digital environments.
- **The Importance of Confidence:** Across all six markets, one message emerges, the main barrier to deeper digital engagement is not access to technology, but confidence in using it. When individuals feel confident, they are more likely to experiment with new tools, solve problems independently and integrate digital technology into their daily routines. When confidence is low, even simple digital tasks can feel intimidating. Creating safe environments where mistakes are accepted as part of learning, where questions are welcomed will increase confidence.



## What Shared Themes mean for the Hi Digital Programme

Collectively, these themes provide a clear direction for the future development of the Hi Digital programme. Across the six markets surveyed, older adults are already engaged with digital technology, and many are eager to continue learning. Programmes that prioritise supportive, practical and collaborative, social learning experiences are likely to have the greatest impact. By focusing on building confidence, reducing stereotype, encouraging curiosity and strengthening social connections, Hi Digital can help ensure that digital technology supports social interaction, participation and wellbeing. Digital inclusion now becomes about empowering people to feel confident navigating a world shaped by digital tools, while remaining connected to the relationships and communities that matter most.



# Conclusion

Together, findings point to the power of confidence, community, collaboration and continuity. Enabling people to use technology in this way reduces loneliness, isolation and stereotype, and can enable more person-to-person contact, relationships and social interaction. True digital inclusion is not only about helping people use technology, but also about ensuring that older people feel empowered to participate fully in a world where digital tools increasingly enable positive everyday experiences.

