# **The Panel’s National Hubs: reflecting on our engagement and impacts over the past year and looking forward to consider the top issues facing communications consumers in the year ahead.**

To kick off the year, we took an opportunity to reflect on the Panel’s National Hubs with stakeholders who attend the Hubs and represent the interests of consumers, citizens and micro-businesses. We provided an overview of our engagement and impacts over the past year and beyond and considered how we can better promote the voices of consumers living across the UK in the communications sector. We also asked Hub participants to share the top communications issues facing the consumers they represent in the year ahead so we can feed these into our review of the Panel’s strategic priorities for the forthcoming year.

## **Hub participants’ reflections on the Panel’s National Hubs**

Since establishing the National Hubs in 2019, we’ve engaged widely with stakeholders on a range of topical issues in the communications sector to help gather intelligence from those who support consumers, citizens and micro-businesses and have direct knowledge of the issues they face on a day-to-day basis, and ultimately strengthen the voices of consumers in the communications sector. We decided to check in with our stakeholders to gather their thoughts on how effective the Hubs are and whether there is anything we can do to improve how they are run. Hub participants’ reflections are included below.

***“I enjoy the thematical focus of each meeting and how the topics focus on issues relevant to the communities we work with.”***

***“It’s good to know that any issues facing the consumers we represent will get fed back to Ofcom.”***

***“I find the Hubs very informative and it’s useful to hear about the issues facing consumers and any crossovers with other organisations.”***

***“The Hubs are very insightful and the variety of experience across the group is great. It would be useful to tap into the expertise and knowledge of Hub participants on occasion, particularly where there are potential cross workings between organisations.”***

***“The issues covered at the Hubs are fairly specific and helpfully feed into aspects of wider policy work.”***

***“It would be useful to take a cross-sector view and consider how the communications sector compares to others by inviting other regulators to participate at future meetings and engage with cross-sector organisations such as UKRN.”***

***“The Hubs have helpfully contributed to inter-governmental liaison and policy by improving knowledge exchange and highlighting real examples of consumer experiences.”***

**Format of post-pandemic meetings of the Hubs**

There was an appetite amongst some participants to hold future meetings in hybrid format so they had the option to attend in-person or virtually. Whilst the benefits of virtual meetings were recognised including driving down travel costs and environmental impacts, and providing greater flexibility so that more people are able to attend than may be the case if the meetings were held in-person, some participants also felt that there was a benefit in attending in-person from time to time to network with Hub participants and build stakeholder relationships.

## **We asked Hub participants what they consider will be the top issues facing the consumers, citizens and/or micro-businesses they represent in the communications sector in the year ahead. The topics raised are outlined below.**

* **Digital exclusion –** ensuring that people can access digital services and are armed with the digital skills required to participate safely online to help secure equality of opportunity and tackle social exclusion.
* **Affordability and consumer debt** **–** making sure that consumers who are struggling financially can continue to engage digitally and not face exclusion.
* **Migration to VoIP –** ensuring that consumers, particularly people who live in rural areas and have additional support requirements such as telecare users are aware of the upcoming changes and safeguarded throughout the switchover.
* **2G/3G switch-off –** ensuring that consumers are safeguarded from potential impacts of the switch-off, especially people living in rural areas.
* **Postal services** – retaining and delivering reliable postal services for citizens across the UK at an affordable cost.
* **Network resilience –** understanding the consumer impacts of network outages and ensuring that consumers particularly those at higher risk of detriment, have sufficient resilience solutions in place in the event of an outage.
* **Support for consumers with additional access requirements –** ensuring that consumers with access and/or additional support requirements have equivalent access to communications services and are aware of the support available to them.
* **Embedding equality and diversity in the communications sector –** making sure that a diverse range of people are represented across the sector, and services and products are designed inclusively to meet a range of consumer requirements.
* **Decarbonisation in the communications sector –** implementing more sustainable working practices across the communications sector and giving consumers the choice to make more carbon friendly decisions.
* **Online safety –** ensuring that people who wish to engage online are able to do so safely and are protected from harmful content online.

Participants also felt that it would be useful to invite complaint handlers to future meetings and understand what they are hearing from consumers.

**You can find below further information on the points raised by Hub participants on these topics.**

## **Digital exclusion – access to infrastructure, social networks and the digital skills required to participate safely.**

* People aren’t hard to reach, services are. As more organisations move to digital by default, more consumers are at risk of exclusion, particularly those who are less likely to engage online such as consumers who are older and/or living with a disability.
* Making sure that people can benefit from social networks is an important facet of digital inclusion.
* Communications from communications providers (CPs) on how consumers can improve digital connectivity and access support needs to be clear, accessible and disseminated widely.
* Consumers living in rural areas face specific issues with digital connectivity such as significantly higher costs associated with getting connected.

**For example:**

**A participant who lives in a rural area was unable to receive a fibre connection so they had to investigate alternative options. They looked into a community broadband option, however they eventually opted for 4G broadband. Their monthly payments have quadrupled and on top of this they still pay for mobile services and a landline in case of a power cut.**

* As the telecoms sector moves to an all-IP system, there are questions around how people living in rural areas where a broadband connection is not available will get connected.
* The implications of being digitally excluded can have severe impacts where an increasing number of services are moving online e.g. healthcare services. This is further exacerbated by a higher number of older consumers tending to live in rural areas. The Older People’s Commissioner for Wales has published guidance about access to services and what organisations can do to shift towards digital whilst safeguarding traditional communications services.[[1]](#footnote-1)
* As we continue to move at pace into a digitalised world and more industries are shifting to digital and requiring people to engage online, it’s becoming even more important for people to have access to a reliable digital connection.

**For example:**

**Farmers are required to submit paperwork online that is fundamental to their businesses such as applications for funding, however we also know that farmers typically live in rural areas where digital connectivity can be poor or non-existent.**

* The cost-of-living crisis will mean that more people are likely to find it difficult to afford digital equipment.
* Getting a basic level of connectivity is a significant barrier for some consumers, and therefore other issues such as slow speeds are not yet a consideration.
* Digital connectivity initiatives and partnerships with grassroots organisations are valued, however there can be challenges with service delivery where resources are limited. It was highlighted that finding volunteers can be a struggle because people believe they need to be IT experts to volunteer.
* Other digital connectivity initiatives should be introduced to help connect consumers, for example, setting up routers in people’s homes.
* A universal service obligation for mobile connectivity should be developed and implemented, similar to the broadband USO. It was flagged that the Shared Rural Network will provide the UK with a significant uplift in mobile connectivity.
* To achieve equality of access, more needs to be done to make sure that consumers can engage online and access the cheapest deals.
* Current initiatives to help people to get online were supported, however more should be done to reach people with specific access requirements who may find it difficult to travel and face additional accessibility barriers.
* Digital skills training must include training on scams and internet fraud.
* Welsh Government has commissioned research to help develop a digital minimum living standard in Wales and a report is due to be published in February[[2]](#footnote-2). There is also further work being funded by Nuffield Health across the rest of the UK.
* Ongoing work to help tackle scams needs to be more proactive and a coordinated cross-industry approach would help to protect consumers.

## **Affordability of communications services and consumer debt**

* Participants were shocked to learn that consumer take-up of social tariffs in the communications sector was so low. Some third sector organisations who provide advice to consumers on financial matters were unaware that social tariffs existed in the communications sector so more needs to be done to raise awareness.
* It was raised that awareness of social tariffs has increased however consumer take-up hasn’t followed. Research published by Which?[[3]](#footnote-3) found that a stigma surrounding social tariffs exists, for instance consumers think the connection will be slower.
* Hub participants raised that CPs did not have a financial incentive to promote social tariffs and questioned whether the current model in the communications sector was correct or whether a different mechanism could be more effective. For example, in the water sector, consumers paid a subsidy to fund social tariffs.
* It was flagged that some social tariffs on offer are still too expensive for consumers on low incomes.
* Consumers will be facing significant in contract price increases over the coming months and the fairness of the practice was questioned. It was felt that consumers impacted by the price rises should be able to switch freely and people who were financially vulnerable exempt from the price rises.
* Since the reintroduction of EU roaming charges, some consumers have faced ‘bill shock’ because of unforeseen roaming charges. This is a particular issue for consumers living and travelling near the UK/EU border who are being charged inadvertent roaming costs for roaming onto a non-UK network, even though they are in the UK.
* Farmers are facing a significant reduction in the rental prices of phone masts, which is having an impact on their finances and income. It was also flagged that calls to mental health organisations from people working in agricultural and rural occupations have significantly increased.
* CPs need to have a better understanding of how consumers prioritise different aspects of digital connectivity and, in turn, make consumer costings more transparent.

## **Migration to VoIP**

* Concerns were raised regarding low awareness amongst consumers of the migration, particularly amongst older consumers.
* The switchover was likely to put at risk people who relied on telecare devices that may no longer work post-migration and people living in areas with poor mobile coverage who could have no connection during a power cut. In addition, available battery back-ups were likely to only last for 2 to 12 hours which didn’t feel sufficient.
* The importance of engaging with Ofcom and industry to ensure that rural and remote communities were safeguarded was highlighted.
* Participants felt that unanswered questions remained on how consumers would be communicated with on the switchover – and supported the Panel’s calls for a centralised communications campaign similar to the Australian communications model.

## **2G/3G switch-off**

* Concerns were raised that consumers could be significantly impacted by the switch-off, particularly on consumers living in areas where not-spots were common.
* It was felt that switching off 3G alongside migration to VoIP was likely to increase potential consumer detriment.
* Smart meters tend to run off 2G/3G connectivity so more needs to be done to raise consumer awareness of the potential impacts, particularly when energy costs are currently so high and misbilling could increase current anxieties.
* The switch-off is likely to impact those who are digitally excluded and have accessibility requirements. 2G/3G equipment also tends to be designed with accessibility in mind such as having larger buttons, bigger handsets and screens. However, this equipment is likely to become obsolete post switch-off and the design of 4G/5G equipment seems less accessible.

## **Resilience of postal services – quality of service and sustainability of the USO**

* The sustainability of the postal USO is a significant concern, particularly as Royal Mail continues to fail to meet its annual performance targets.
* Recent postal strikes have negatively impacted consumers such as missing important healthcare letters.

**For example:**

**A consumer had been waiting for a hospital appointment for a year. One day the consumer received a call from the hospital asking why the appointment had been missed and it transpired that the appointment letter had been delayed/lost in the post.**

* Consumers living in rural areas are likely to face additional detriment due to delayed postal deliveries, and limited postal carriers means less competition and additional costs.

## **Network resilience**

* Network outages can significantly impact people and communities and more should be done to understand the consumer impacts of outages, particularly where the time taken to fix these issues can be lengthy.
* There were concerns that CPs are required to report a network outage based on the number of people it affects, however outages can significantly impact smaller communities too. Further, NIS guidance on reporting thresholds focused on the national impacts and did not appear to consider the resilience requirements of communities who were isolated during power outages.
* Participants flagged that local resilience issues should be picked up through local councils and fed into local resilience partnership groups.

## **Support for consumers with additional access requirements**

* CPs should widely promote available services that help to support consumers with additional access requirements.

**For example:**

* **consumers can access ‘Just a Minute’ cards to let organisations know that they have an access requirement.**
* **some people are unable to use the phone because of hearing loss and are unaware of services that could help such as Relay UK.**

**missed.**

* Be consistently looking to improve services that support consumers with specific access requirements to help achieve equality of access.

**For example:**

**Hub participants who represent consumers with hearing loss advised that Relay UK was very slow and communicating using the service could be very difficult.**

* People are unlikely to face issues in isolation and when trying to identify solutions to assist consumers who need additional support, policymakers need to consider how different issues intersect and impact people’s lives.
* CPs should improve how they engage with people representing consumers e.g. third sector organisations and people nominated to help manage a person’s account.
* Subtitles across broadcasting platforms and content are inconsistent, and broadcasters and digital platforms should endeavour to improve provision of subtitles so all consumers can benefit from them. This is particularly important for consumers with hearing loss who rely on subtitles to access important information e.g. government announcements.
* CPs should provide frontline staff with training on consumer access requirements and the accessibility features of digital equipment so they can share their knowledge and provide advice to consumers at the point of sale and ensure that consumers are being sold a device that suits their requirements.
* Participants supported Ofcom’s Treating Vulnerable Customer Fairly guide[[4]](#footnote-4) but would find it useful to understand how the guide is being implemented and any specific outcomes.

## **Decarbonisation in the communications sector**

* There are significant carbon costs in both the telecoms and postal services such as diesel generators to run masts, using planes to send first class post; and multiple parcel deliveries to one household using diesel vehicles.
* More sustainable approaches should be implemented and consumers able to choose if they would be happy to amend the service to reduce carbon emissions.

## **Stakeholders who took part in our discussions are listed below.**

* **Advice NI**
* **Age UK**
* **Cedar Foundation**
* **Citizens Advice**
* **Citizens Advice Scotland**
* **Competition and Markets Authority**
* **Consumer Scotland**
* **Department of Finance**
* **Disability Action**
* **Essential Services Access Network**
* **Farmers Union Wales**
* **Federation of Small Businesses**
* **Good Things Foundation**
* **Mind**
* **National Association of Deafened People**
* **National Farmers Union**
* **National Federation of Women’s Institute**
* **Northern Ireland Trading Standards Service**
* **Ofcom’s Advisory Committees**
* **Older People’s Commissioner for Wales**
* **People Know How**
* **Race Equality Foundation**
* **Rural Health and Care Wales**
* **Scottish Government**
* **Scottish Council for Voluntary Organisations**
* **Society of Chief Officers of Trading Standards in Scotland**
* **Unite - Retired Members Branch**
* **Welsh Government**
* **Which?**

## **For links to research and insights shared by participants across the Hubs – please see below.**

* [The Panel’s research on migration to VoIP and the telephony needs of consumers](https://www.communicationsconsumerpanel.org.uk/research-and-reports/switching-from-analogue-to-telephony-listening-to-the-needs-of-landline-consumers-2022)
* [Ofcom information on accessing cheaper broadband and phone packages](https://www.ofcom.org.uk/phones-telecoms-and-internet/advice-for-consumers/costs-and-billing/social-tariffs#full-list-of-available-tariffs)
* [Which? research on social tariffs](https://consumerinsight.which.co.uk/articles/broadband-social-tariffs)
* [Treating vulnerable customers fairly guide v2.0 (ofcom.org.uk)](https://www.ofcom.org.uk/__data/assets/pdf_file/0024/244473/2022-treating-vulnerable-customers-fairly.pdf)
* [Older People's Commissioner for Wales: Ensuring access to information and services in a digital age](https://olderpeople.wales/wp-content/uploads/2022/05/S12-Guidance-Ensuring-access-to-information-and-services-in-a-digital-age.pdf)

## **For more information on previous discussions across the Panel’s National Hubs – please read on. You can find a summary of all previous discussions and see who took part on the Panel’s website** [**here**](https://www.communicationsconsumerpanel.org.uk/stakeholder-engagement/the-panels-national-hubs)**.**

* In October 2022, Ofcom’s affordability team provided an **overview of its ongoing work to help communications consumers who are struggling to afford their communications services** and Hub participants shared insights from their respective sectors.
* In July 2022, **Ofcom's Market Research team provided insights from Ofcom’s Making Sense of Media programme, which seeks to help improve the online skills, knowledge and understanding of people living in the UK** - and participants discussed the findings and online experiences of the consumers they represent.
* In January and February 2022, **Ofcom's post policy team provided an overview of its policy proposals for the future of postal regulation and participants discussed consumers, citizens and micro-businesses experiences of the postal sector across the UK.** The outputs fed into the Panel's response to Ofcom's consultation on the future of postal regulation.
* In October 2021, Hub participants explored **what excellent customer service looks like and considered the benefits of communications providers developing a Customer Charter**.
* In June and July 2021, Hub participants fed into **our think-piece on making communications services inclusive and accessible –** [published here](https://www.communicationsconsumerpanel.org.uk/news/latest/post/763-our-top-tips-on-making-communications-services-inclusive-and-accessible-for-all-consumers)**.**
* In May 2021, we held our first UK-wide Hub, bringing together consumer representatives across each of the UK Nations to discuss**the potential impacts of migration to voice-over IP on consumers, citizens and micro-businesses.**
* In April 2021, our discussions focused on **digital inclusion, skills and confidence; and the importance of equipping consumers, citizens and micro-businesses with the necessary tools to participate digitally**.
1. [Older People's Commissioner for Wales: Ensuring access to information and services in a digital age](https://olderpeople.wales/wp-content/uploads/2022/05/S12-Guidance-Ensuring-access-to-information-and-services-in-a-digital-age.pdf) [↑](#footnote-ref-1)
2. [Welsh Government: Towards a Welsh Minimum Digital Living Standard: final report (summary)](https://www.bing.com/search?q=welsh+government+mdls+reseawrch&cvid=3aa0a85593a64cf2b5cdfd032a34c177&aqs=edge..69i57j0l5j69i11004.13552j0j1&pglt=41&FORM=ANNAB1&PC=U531) [↑](#footnote-ref-2)
3. [Four common misconceptions about broadband social tariffs - Which? News](https://www.which.co.uk/news/article/four-common-misconceptions-about-broadband-social-tariffs-aNleg5E4wviG) [↑](#footnote-ref-3)
4. [Treating vulnerable customers fairly guide v2.0 (ofcom.org.uk)](https://www.ofcom.org.uk/__data/assets/pdf_file/0024/244473/2022-treating-vulnerable-customers-fairly.pdf) [↑](#footnote-ref-4)