**The Panel’s National Stakeholder Hubs recently focused on digital inclusion, skills and confidence and the importance of equipping consumers, citizens and micro-businesses with the necessary tools to participate digitally.**

The Panel believes that all citizens who wish to, should be able to participate digitally. To achieve this, digital connectivity should be recognised as an essential service and consumers, citizens and micro-businesses across the UK able to access basic, secure, affordable, reliable, resilient communications services. Those services need to be both accessible and usable across a variety of devices. Consumers also need the skills and confidence to navigate the communications market, participate digitally and stay safe online.

As part of [the Panel’s strategic plan](https://www.communicationsconsumerpanel.org.uk/downloads/englishccpacod--2021-22.pdf) we are committed to engaging with stakeholders whose role and core mission is to help to bridge the digital divide.

**The impact of the Covid-19 pandemic on digital inclusion, skills and confidence**

The Covid-19 pandemic has highlighted the importance of digital connectivity to carry out daily tasks, access welfare benefits and stay in touch with friends and family. Yet many people face significant barriers when trying to benefit from and take advantage of the digital world. We have consistently heard from our stakeholders that consumers across the UK lack the digital skills and confidence required to participate safely and effectively online and we sought to further understand the barriers that consumers face in the communications sector.

**Working together to bridge the digital divide**

In April 2020, the Panel’s National Stakeholder Hubs heard from representatives of organisations who are committed to bridging the digital divide across the UK Nations. These included: [Supporting Communities](https://supportingcommunities.org/) and [Go ON NI](https://www.nidirect.gov.uk/campaigns/go-on-ni), [Digital Communities Wales](https://www.digitalcommunities.gov.wales/), [Connecting Scotland](https://connecting.scot/) and [Good Things Foundation](https://www.goodthingsfoundation.org/). We also heard from Which? who provided an overview of [its recently published Consumer Insights reports.](https://consumerinsight.which.co.uk/)

The Panel also provided a preview of its soon to be published qualitative research on digital connectivity during the pandemic, highlighting the challenges consumers, citizens and micro-businesses faced, what actions they took and what support they might need to help them participate digitally in future.

**We asked our stakeholders what more could be done to secure digital participation, skills and confidence for consumers, citizens and micro-businesses. Our stakeholders highlighted the barriers that communications consumer face and how the communications sector, UK governments and others could go further to help consumers participate digitally.**

**Highlighted below are the key barriers to digital participation that emerged from our discussions with Hub participants across the UK Nations.**

1. **Consumers, citizens and micro-businesses lack the digital skills, support and confidence to participate online.**
2. **Consumers, citizens and micro-businesses fear being targeted by scams; and poor digital experiences can negatively impact confidence and motivation.**
3. **Communications services and digital devices are not inclusively designed and often consumers with access requirements do not know how to find accessibility support.**
4. **Many consumers, particularly those with access requirements face additional costs associated with meeting their communications needs – referred to by Hub participants as ‘communications poverty’.**
5. **Consumers, citizens and micro-businesses who live and/or work in areas where connectivity is poor, particularly those in rural or remote areas, find it difficult to take advantage of the digital world.**

Barriers to digital participation will rarely exist in isolation. Consumers, citizens and micro-businesses are likely to experience these barriers alongside one another and to narrow the digital divide we believe that all barriers, such as poor accessibility, security, connectivity and affordability should be addressed simultaneously.

**A full summary of our discussions and those who took part can be found below.**

1. **Consumers, citizens and micro-businesses lack the digital skills, support and confidence to participate online.**
* Small businesses have been forced to move their business models online during the pandemic and adopt short-term fixes to continue trading online. A significant digital skills gap has emerged, and businesses need to acquire the skills to adopt long-term solutions. In addition, the short-term fixes adopted could mean that businesses are vulnerable to scams and fraudulent activity.
* Older people continue to experience barriers to digital engagement and find the volume of information online difficult to navigate.
* Since the pandemic, many businesses have adopted digital-only solutions e.g. many bars and restaurants accept card payments only and take orders via apps. These practices exacerbate digital inequalities and do not factor in that a portion of consumers either do not engage digitally, do not own a smartphone or have limited digital skills.
* To engage with digitally excluded people, jargon-free language should be adopted. The Panel’s research found that some participants did not understand terminology such as ‘link’ or ‘download’.
* Digital skills training should be tailored for different consumers – one format will not meet all consumers’ needs.
* Face-to-face support can be hard for some consumers to access due to mobility barriers, and digital events have enabled consumers to participate – stakeholders recommended that those providing support for consumers are flexible in their approach, adopting a ‘hybrid’ model to fulfil both preferences. The Panel has received positive feedback from participants about the accessibility of its National Stakeholder Hubs and we have valued the participation of stakeholders with a range of accessibility needs.
* Similar to other industries, such as banking the communications sector should introduce digital inclusion initiatives to help consumers acquire digital skills; and where these initiatives already exist, they should be widely promoted.
* Many consumers and citizens rely on friends and family to support them when they go online, however this is not an option for all consumers and citizens. UK governments should provide support where required to reflect the essential nature of digital connectivity and to tackle social inequalities and isolation.
* Further work is required to map out which organisations interact with digitally excluded people to help bridge the digital divide. In addition, those who provide or are relied on to provide digital support to others need to have sufficient digital skills themselves.
* Businesses need to prioritise upskilling their workforce.
* Troubleshooting support is an important support mechanism and needs to be effective to help consumers seeking support online. Our research on digital connectivity during the pandemic found that participants welcomed more troubleshooting support from communications providers.
1. **Consumers, citizens and micro-businesses fear being targeted by scams; and poor digital experiences can negatively impact confidence and motivation.**
* The purported rise in scams throughout the pandemic has meant that many consumers are wary of the digital world. Consumers who have been targeted by a scam and suffered either financially or emotionally are likely to reduce/avoid online activity.
* Scams have become much more sophisticated and can be difficult to spot – even by more confident and skilled consumers. The Panel’s scams research – [Scammed! Exploited and afraid](https://www.communicationsconsumerpanel.org.uk/news/latest/post/749-our-new-research-on-scams-has-been-published) - had previously found the same.
* Preventing and tackling scams effectively is important to help grow consumers’ digital confidence. UK governments, the communications sector and others should collectively seek to mitigate the risk of scams.
* Consumers have shown concern about safety online including how personal data is handled and data privacy.
* Organisations tasked with tackling the digital divide should seek to understand from consumers who have moved online, the type of support received and what worked well to help others move online. It was noted that the Panel’s research had found that those with confidence were more likely to articulate to researchers the challenges experienced.
* Ofcom’s research has shown that the number of households without access to the internet across the UK has fallen from 11% in March 2020 to 6% in March 2021[[1]](#footnote-1) - the reduction is a positive step towards digital inclusion, however concerns remain that people who have moved online with limited digital skills could be more susceptible to online risks e.g. scams.
* As we move towards a digitalised world, messages around online safety need to be positive and targeted.
* Some consumers who are digitally connected experience unreliable and poor connections.
* Digitisation of essential services during the pandemic has, in some cases, resulted in poor digital experiences for consumers.[[2]](#footnote-2)
1. **Communications services and digital devices are not inclusively designed and often consumers with access requirements do not know how to find accessibility support.**
* Many public sector websites are inaccessible and lack usability – this is particularly concerning where consumers use these websites to access welfare benefits.
* The pandemic has resulted in significant communications barriers for consumers with access requirements - these requirements can overlap, making the barriers difficult to distinguish and mitigate.
* Since the pandemic, consumers with access requirements have relied on functionalities across different platforms – the quality of these services can be inconsistent.
* Participants with a vision impairment tend to be older and lack confidence; and need further support to overcome digital barriers.
* Consumers should be able to request communications services in a format of their choice – this is particularly important for consumers with access requirements.
* Many d/Deaf consumers rely on text messaging and are unaware of accessibility features on smartphones. Communications services or devices that provide support to consumers with access requirements should be widely promoted. In addition, retail staff should be trained and knowledgeable of available accessibility support and features – particularly where consumers are required to sign-up to long-term contracts. In addition, digital device training should be tailored for specific consumers.
* CPs should ensure that customer service communications channels should be easily available and accessible.
* Research in the communications sector should further consider persons with access requirements.
1. **Many consumers, particularly those with access requirements face additional costs associated with meeting their communications needs – referred to by Hub participants as ‘communications poverty’.**
* Many consumers with access requirements have to pay a premium for communications services, however not all consumers can afford these costs.
* Digital connectivity is an essential service and low-cost, fit for purpose connectivity solutions should be available to financially vulnerable consumers e.g. social tariffs.
* Many UK consumers cannot afford data and devices. Research conducted by Shelter Cymru during the pandemic found that 18 per cent of families in Wales – equivalent to 114,000 children - lacked a computer or laptop.[[3]](#footnote-3)
* Communication poverty is a significant issue – for consumers who benefit from additional communications requirements such as remote notetaking, sign language Interpreting, audio description – the associated costs can be burdensome, particularly where a reliable and fast connection is required to carry these services.
* Disability Equality Scotland surveyed its members in January 2021: 83% advised that they were unable to afford communications services, regardless of accessibility barriers.
* Connectivity in care homes should be affordable to help connect residents. The Panel will be publishing its recently commissioned research on connecting people in care, in the coming weeks.
1. **Consumers, citizens and micro-businesses who live and/or work in areas where connectivity is poor, particularly those in rural or remote areas, find it difficult to take advantage of the digital world.**
* Many people remain offline and offline communications channels e.g. newspapers need to be retained and utilised to reach these consumers.
* Since the pandemic, face-to-face advice and support has been limited or non-existent. Closures of libraries and Citizen Advice Bureau’s has meant that many consumers may not have sought help during the pandemic.
* Rural communities are significantly impacted by the digital divide and social isolation. These communities would benefit from targeted initiatives to help get them connected.
* Many consumers, citizens and micro businesses are unaware of the connectivity initiatives available in their area.

**Stakeholders who contributed to the discussions are listed below.**

* **Independent consumer representatives**
* **Money Advice Pensions Service**
* **Money and Mental Health Policy Institute**
* **National Association of Deafened People**
* **National Federation of the Blind**
* **NFU Scotland**
* **Ofcom**
* **Ofcom’s Advisory Committees**
* **Older People’s Commissioner for Wales**
* **QMU Dispute Resolution**
* **RNIB**
* **The Rural Community Network**
* **RSABI**
* **Rural Health and Care Wales**
* **Scottish Government**
* **SCVO**
* **Shelter Cymru**
* **Society of Chief Officers of Trading Standards in Scotland**
* **Supporting Communities**
* **Wales Cooperative Centre**
* **Wales Council for Voluntary Action**
* **Wavelength**
* **Welsh Government**
* **Which?**
* **Advice Direct Scotland**
* **Advice NI**
* **Age Scotland**
* **Age UK**
* **The Alliance**
* **Alzheimer’s Society**
* **Christians Against Poverty**
* **Citizens Advice Cymru**
* **Citizens Advice Scotland**
* **Competition and Markets Authority**
* **Consumer Council for Northern Ireland**
* **COSLA**
* **Countryside Alliance**
* **deafscotland**
* **Department of Agriculture, Environment and Rural Affairs**
* **Department of Finance**
* **Digital Health and Care Wales**
* **Disability Equality Scotland**
* **Digital Office for Scottish Local Government**
* **Farmers’ Union Wales**
* **Federation of Small Businesses**
* **Good Things Foundation**
* **Includem**

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

* [Connecting Scotland programme – click here to access](https://connecting.scot/)
* Nesta publication: [Data Poverty in Scotland and Wales - click here to view](https://media.nesta.org.uk/documents/01-FS_NEST_DPENG_Book.pdf)
* [Virgin Money - Money on your mind? initiative - click here to find out more](https://uk.virginmoney.com/money-on-your-mind)
* [Barclays: Digital Eagles initiative - click here to find out more](https://www.barclays.co.uk/digital-confidence/eagles/)
* Ofcom publication: [Adults’ and Media Use and Attitudes Report – click here to access](https://www.ofcom.org.uk/__data/assets/pdf_file/0025/217834/adults-media-use-and-attitudes-report-2020-21.pdf)
* Ofcom’s Fairness Commitments: [Click here to access the commitments in full](https://www.ofcom.org.uk/about-ofcom/latest/media/media-releases/2019/broadband-and-phone-firms-put-fairness-first)
* Money and Mental Health Policy Institute publication: [Safety Net - Breaking the link between online financial harms and mental health problems - click here to access](https://www.moneyandmentalhealth.org/safety-net/)
* Shelter’s report on [Life in Lockdown in Wales](https://sheltercymru.org.uk/wp-content/uploads/2020/11/Life-in-lockdown-in-Wales_Nov-2020.pdf)
* [Research covered by BBC Wales](https://www.bbc.co.uk/news/uk-wales-53082152) also reflected these findings, showing that over 72% of pupils accessed less than an hour of online learning per day.
* Ofcom publication: [please click here to view: Connected Nations 2020: UK report](https://www.ofcom.org.uk/__data/assets/pdf_file/0024/209373/connected-nations-2020.pdf)
* Age Cymru publication: [please click here to view the experiences of people aged 50 or over in Wales during the first Covid-19 pandemic](https://eur01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.ageuk.org.uk%2Fcymru%2Flatest-news%2F70-of-older-people-had-difficulty-accessing-health-services-during-pandemic%2F&data=04%7C01%7CChloe.Newbold%40ofcom.org.uk%7C2ecf9e5c844d47062eca08d9055cfdb4%7C0af648de310c40688ae4f9418bae24cc%7C0%7C0%7C637546719221426905%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=6kEXe212kxSRGM7W2jpRgF7%2FTF4fPxVyOsMC2DyYJrk%3D&reserved=0)
* Which? consumer insight report for Wales – [please click here to access the full report on Which? website.](https://eur01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fconsumerinsight.which.co.uk%2Fnation-reports&data=04%7C01%7CChloe.Newbold%40ofcom.org.uk%7C4a23c54f942e4d77c3ea08d900efd785%7C0af648de310c40688ae4f9418bae24cc%7C0%7C0%7C637541852396861866%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=SuNDOp97JXHJbRF%2BPreVdc3YCAZw8efMDXrNuZ0NsBE%3D&reserved=0)
* Which? consumer insight report for Northern Ireland – [please click here to access the full report on Which? website.](https://eur01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fconsumerinsight.which.co.uk%2Fnation-reports&data=04%7C01%7CChloe.Newbold%40ofcom.org.uk%7C4a23c54f942e4d77c3ea08d900efd785%7C0af648de310c40688ae4f9418bae24cc%7C0%7C0%7C637541852396861866%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=SuNDOp97JXHJbRF%2BPreVdc3YCAZw8efMDXrNuZ0NsBE%3D&reserved=0)
* Which? consumer insight report for Scotland – [please click here to access the full report on Which? website.](https://eur01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fconsumerinsight.which.co.uk%2Fnation-reports&data=04%7C01%7CChloe.Newbold%40ofcom.org.uk%7C4a23c54f942e4d77c3ea08d900efd785%7C0af648de310c40688ae4f9418bae24cc%7C0%7C0%7C637541852396861866%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=SuNDOp97JXHJbRF%2BPreVdc3YCAZw8efMDXrNuZ0NsBE%3D&reserved=0)

**For more information on previous discussions across the Panel’s National Hubs – please see below.**

* In January and February 2021, our discussions focused on the **affordability of communications services and consumer debt -**[please click here to read a summary of our discussions](https://www.communicationsconsumerpanel.org.uk/.well-known/the-panels-national-hubs---affordability-of-communications-services-and-debt-%28summary%29.docx). The summary outlines the key messages that emerged from our discussions and includes a list of stakeholders who took part.
* In September and October 2020, participants discussed**rural connectivity and the types of issues and impacts that communications consumers living, studying or working in rural areas face -** [please click here to read a summary of our discussions.](https://www.communicationsconsumerpanel.org.uk/downloads/summary-of-the-panels-national-hubs---rural-connectivity-%28including-intro%29.docx) The summary includes a list of stakeholders who took part and further information on available connectivity initiatives across the Nations.
* In December 2020, the Panel published research on **scams and fraudulent activity, exploring how consumers have been targeted across communications channels**. Our discussions with Hub participants on the impacts of scams on consumers, citizens and micro-businesses fed into our research recommendations. [Click here to access our cover report, recommendations and full research findings.](https://www.communicationsconsumerpanel.org.uk/research-and-reports/scammed-exploited-and-afraid-)
* In early 2020, during the initial stages of the Covid-19 pandemic, we discussed **the impacts of the Covid-19 pandemic on communications consumers -**[please click here to read a summary of our discussions.](https://www.communicationsconsumerpanel.org.uk/downloads/ccp-acod-national-hubs---covid-19-consumer-issues-%281%29.docx)
1. <https://www.ofcom.org.uk/__data/assets/pdf_file/0025/217834/adults-media-use-and-attitudes-report-2020-21.pdf> [↑](#footnote-ref-1)
2. <https://www.ageuk.org.uk/globalassets/age-cymru/documents/covid-19-survey/experiences-of-people-aged-50-or-over-in-wales-during-the-first-covid-19-lockdown-and-the-road-to-recovery---october-2020-eng.pdf> [↑](#footnote-ref-2)
3. <https://sheltercymru.org.uk/wp-content/uploads/2020/11/Life-in-lockdown-in-Wales_Nov-2020.pdf> [↑](#footnote-ref-3)