![Communications Consumer Panel logo]

Getting 'Up to Speed'
while Staying at Home

UK consumers' digital connectivity challenges during 'lockdown'

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Communications Consumer Panel
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Executive Summary

Background

The Communications Consumer Panel listens to the voices of consumers, citizens and micro businesses, and ensures that they are heard by industry, Ofcom, government and others. As well as engaging with stakeholders who work with consumers on a daily basis, we commission independent research on topics where there is risk of harm to consumers – and particularly to groups who may have additional requirements or whose voices may be less heard by policy makers and industry.

The issue

The Panel has long been convinced that digital connectivity should be viewed as an essential service – particularly in the context of the pandemic, when unprecedented restrictions on people's ability to mix in person have led to it playing an even greater role in people's lives.

This led the Panel to commission research to understand the barriers to digital connectivity, the problems that connectivity is able to solve, and the impacts that insufficient connectivity can have.

Ofcom's recent research suggests that the digital divide has narrowed during the pandemic, but that significant gaps remain, with older people and those who are financially vulnerable at particular risk of digital exclusion. It also suggests that as many as one in five people lack basic digital skills and are at risk of a range of negative impacts.

Our research comprised 60 in-depth interviews across the UK with people who were trying to do something new online during the pandemic, such as home schooling, using new types of digital communication or digital services. It focused mostly on people who had experienced challenges achieving their digital requirements and included older people, those on low incomes, people with disabilities and microbusinesses.

Objectives

Our objectives were to understand:

- What have been the digital connectivity experiences of UK consumers, citizens and microbusinesses during the pandemic?
- Are there particular people/groups who have not been able to make full use of digital connectivity?
- What have the impacts been of lacking sufficient access to digital connectivity or the skills to use it?
- Moving forward, what do people expect their digital connectivity needs to be?

Key insights

1. People experienced the newly expanded role of the internet in their lives in very different ways – some considered it a 'lifeline', while for others it added to the financial and emotional toll of the pandemic.

2. Common digital connectivity problems included connection reliability or speed, lack of digital skills, lack of equipment, affordability and challenges caused by personal circumstances like low literacy.

3. Some barriers people faced were caused by structural impediments such as a lack of ability to upgrade their internet connection, lack of an adequate response from communication providers to connection problems or poor usability of digital government services.

4. Insufficient connectivity caused impacts such as an inability to access essential products and services, ability to make a living, negative health outcomes, damage to children's educational attainment and ability to maintain social connections.

5. But some people experienced important advantages from being able to be online during the pandemic – maintaining some semblance of normal life by continuing work, schooling, transactions and social interactions.

6. There is a group of people with 'low digital resilience'. This means that they are much less able to make full use of online connectivity. It goes beyond those traditionally considered 'digitally excluded' and takes in those who lack support from family, workplace, school or communication provider.

7. Increased home working is the main digital connectivity need that people expect to continue beyond the pandemic, linked with a requirement for reliable connections, minimum line speeds and better troubleshooting support.

Recommendations

The Panel proposes the following practical steps to take to address some of the issues highlighted by this research:

- ➢ **Establishing minimum digital access in law**
  The pandemic has led to the rapid expansion of the 'digital by default' delivery of services, and we can expect that in many cases, video-based service delivery will continue post-pandemic. This research reveals that access to the digital infrastructure and equipment required to access those services is very unequal. To mitigate this, government should look into enshrining the concept of minimum digital access in law.

- ➢ **Tighter standards to protect people online**
  People have been forced to access the basic necessities of life, such as work, education, social interactions, shopping and public services, online during the pandemic – many fear that this has left them exposed to fraud, exploitation and other criminality. Governments need to work with regulators to establish and enforce tighter standards to ensure that all members of society can safely use the essential government services they need.

- ➢ **Better usability of government online services**
  This research has highlighted problems with the usability of government online services. The perceived complexity of online government forms poses challenges to a wide range of people in a way that other transactive channels such as online banking, gambling and shopping do not – and any consumer may be in a vulnerable circumstance when using these websites The UK and devolved governments should work together to develop and share good practice in online usability, including within local authorities and to agencies such as DVLA, HMRC and the Passport Office. Government bodies should work to make public websites consistently easy to use, building in using testing early on and regularly with people who have a range of additional access requirements.

- ➢ **Extending automatic compensation schemes**
  People's ability to take advantage of the opportunities that online technology gives them is often limited by poor connectivity – whether slow speeds or intermittent connections. Given the essential nature of these services, highlighted in this research, we believe Ofcom should consider extending the coverage of automatic compensation schemes to the full range of connectivity issues that significantly impact citizens' ability to be socially and economically active.

- ➢ **Training for developing citizens' online skills and confidence**

The pandemic has been a spur for many previously narrow or non-users of the internet to try and use it in new ways. It has also highlighted significant skills and confidence gaps among the population – gaps in technical skills, but also in the social skills needed to interact online, and the critical thinking skills needed to understand and navigate a complex landscape of online information. This research also highlights that many people who feel they lack digital skills and confidence find themselves 'driving without a licence' – guiding other non-users or novices online without the requisite skills to know how to prevent or tackle problems. The government needs to look into how appropriate training can be given to citizens – particularly those with limited access to support from their families or who are at risk of exclusion - to enable them to take full advantage of new online opportunities.

➢ **Alternative channels of support for government and public services must remain readily available**
People who do not want to, cannot, or cannot yet access digital public services confidently should still receive a good quality service. We regularly encourage communications providers to make available as wide a range of communications channels as possible, as seen in our recent research into consumers' ability to contact their provider. We believe consumers and citizens must be able to contact government and public bodies easily, without risk of detriment.

Read on for more detail on the research, including case studies.

Background

The Communications Consumer Panel listens to the voices of consumers, citizens and micro businesses, and ensures that they are heard by industry, Ofcom, government and others. As well as engaging with stakeholders who work with consumers on a daily basis, we commission independent research on topics where there is a risk of harm to consumers – and particularly to groups who may have vulnerabilities or additional requirements.

The Panel has believed for a number of years that digital connectivity should be regarded as an essential service alongside other utilities. This need has become even more pressing during the pandemic, with digital connectivity playing an even greater role in people's lives due to the stay-at-home order, the closure of many workplaces, the advice to work from home if possible, and the requirement for clinically vulnerable people to shield.

During the initial stages of the Covid-19 pandemic and beyond, we've heard from participants of our National Stakeholder Hubs[1] – a series of roundtable discussions across England, Northern Ireland, Scotland and Wales attended by consumer-focused organisations to discuss issues facing communications consumers – that a significant number of people are unable to benefit from and take advantage of the digital world. The key barriers to digital participation that emerged from our discussions across the UK Nations are outlined below:

1. Consumers, citizens and micro-businesses who live and/or work in areas with poor or no digital connectivity, particularly those in rural or remote areas, find it difficult to take advantage of the digital world.
2. Many consumers, citizens and micro-businesses find it difficult to afford communications services and associated equipment e.g. smart phones, laptops.
3. Many consumers, particularly those with access requirements face additional costs associated with meeting their communications needs – referred to by Hub participants as 'communications poverty'.
4. Communications services and digital devices are not inclusively designed and often consumers with access requirements do not know how to find accessibility support.
5. Consumers, citizens and micro-businesses lack the digital skills, support and confidence to participate online.
6. Consumers, citizens and micro-businesses fear being targeted by scams; and poor digital experiences can negatively impact confidence and motivation.

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[1] The Panel's National Stakeholder Hubs

We are committed to engaging with stakeholders whose role and core mission is to help to bridge the digital divide[2] and, across the National Hubs, continue to engage with representatives of Connecting Scotland, Digital Communities Wales, Good Things Foundation and Supporting Communities.

Ofcom research has highlighted that while the digital divide has narrowed during the pandemic, significant gaps remain. The estimated proportion of UK homes without internet has fallen from 11% to 6%, but older people and those who are financially vulnerable remain at risk of exclusion[3]. What is more, a large segment of the population still lacks digital life skills. An estimated one in five people lack basic digital skills[4], leading to a range of negative impacts including poorer health outcomes and social isolation.

We wanted to further understand and hear directly from consumers, citizens and micro-businesses the barriers to digital connectivity that they were facing as they tried to use the internet in new ways during lockdowns, the problems that connectivity was able to solve and the impacts that insufficient connectivity was having.

What we did

We commissioned a programme of 60 qualitative in-depth interviews across the UK with people who have tried to, or wanted to, do something different online during the pandemic.

Mostly, we targeted people who had experienced challenges in achieving their digital requirements, but we also included in the research some people who did not have any issues. The people we talked to took in a wide cross-section of the UK population including older people, people living on low incomes, people with disabilities, microbusinesses, people living in the devolved nations, and people living in rural as well as urban areas.

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[2] The Panel's strategic plan 2021/22
[3] 'Digital divide narrowed by pandemic, but around 1.5m homes remain offline', Ofcom research report, 28 April 2021
[4] 'Developing essential digital skills', 2020 Lloyds Bank Consumer Digital Index research briefing, 7 May 2021

Objectives

We had a number of primary objectives for the research. We wanted to understand:

- What have been the digital connectivity experiences of UK consumers, citizens and microbusinesses during the pandemic?
- Are there particular people/groups who have not been able to make full use of digital connectivity?
- What have the impacts been of lacking sufficient access to digital connectivity or the skills to use it?
- Moving forward, what do people expect their digital connectivity needs to be?

What we found

1. **The pandemic prompted people to turn to online connectivity for many reasons, some of which may have been new to them**. These included working or running businesses from home for the first time, home schooling, new types of digital communication like video calling, new types of entertainment like online gaming, or using digital services like banking, shopping or government services for the first time.

2. **People experienced this newly expanded role of the internet in their lives in very different ways.** Some people actively sought out these new uses, but others felt that the lack of other channels had forced them into it. For some, digital connectivity during the pandemic was a 'lifeline', while for others it added to the financial and emotional toll of the pandemic.

   "I contacted (my provider) and said 'I can't cope'. They said I'd find it easier with fibre so I had to have it. I am totally dependent on the internet to survive, it's not a good feeling." (69 year old woman, clinically vulnerable and shielding, lives in a rural area in Wales)

3. **Challenges that people experienced included connection reliability or speed, digital skills issues, lack of equipment, affordability and wider usage challenges caused by personal circumstances like low literacy.** Some were able to resolve these challenges, but others lacked the skills, financial resources or support to do so.

4. **Some of the connectivity barriers people faced were caused in part by structural impediments rather than personal characteristics.** These included the lack of option to upgrade their internet connection at their address, lack of an adequate response from communication providers to connection problems, lack of financial support to get the necessary equipment, an inherent lack of usability of some digital government services, and insufficient access to assisted digital support or skills development.

> *"(I wish there would have been) grants and support to buy essential IT kit. Like a loan scheme where you get vouchers to buy IT and you can pay it back each week from your benefits." (29 year old, sole parent and not working, lives in a rural area in the South of England)*

5. **Insufficient connectivity caused a range of negative impacts for people and their families.** They affected some people's access to essential products and services, health outcomes, finances and ability to make a living, children's educational attainment ability to maintain social connections contributing to their isolation.

> *"I've gone from teaching classes in the studio to somehow trying to figure out how to teach classes online. And it's not as easy as you might think! I was very, very overwhelmed. I'm only doing 3-4 hours a week online for work now – it hasn't gone so well." (26 year old woman, runs a microbusiness, lives in an urban area in the East of England)*

6. **There were also important advantages that people experienced from being able to be online during the pandemic.** Where people were able to access sufficient digital connectivity, it enabled them to maintain some semblance of normal life, by continuing with their work or businesses, schooling, transactions and social interactions. This mitigated some of the most detrimental effects of the pandemic.

> *"I am in touch with my cousins in Canada. It's like you get a window into their lives every week, when before I would only go and visit them every couple of years." (74 year old woman, new internet user, has a mental health condition, lives in a rural area in Wales)*

7. **The group of people with 'low digital resilience' who are most at risk of harm from insufficient connectivity during the pandemic is broader than those traditionally seen as digitally excluded.** People in this category

include those with low digital skills, low incomes and those with potential vulnerabilities like mental health conditions - but it also includes those who lack support from their family, workplace, school or communications provider, or who are unable to improve their connection quality.

8. **Increased home-working is the main digital connectivity need that people expect to continue beyond the pandemic**. This is linked with a requirement for a reliable connection and minimum line speeds that will permit video calling or streaming, as well as for better trouble-shooting support from communications providers.

Case studies

When recruiting people to take part in this research, we focused on people in different circumstances who were using the internet in a range of different ways during the pandemic. The case studies below tell the story of three people in different circumstances that illustrate some of the issues the main research report highlights. It is our policy to change the names of research participants in all our reports, to protect their identity and stock images are used.

Case study 1: Chrissie, had to move home due to poor connectivity

Poor physical environment
No opportunity to improve connection
Mental health condition

Chrissie is 28 and normally lives with flatmates in London, but she is now staying with her parents as she required more support. She is a policy adviser and reports having a mental health condition.
The basement flat she rents has a very poor broadband connection. The household had switched broadband provider just before the pandemic for better connection quality but this didn't help. This meant that during the pandemic, when all the flatmates were working from home, they needed to compete to be in the bathroom, where the connection is best, to hold work calls. Her employer offered her a dongle as a workaround but her flatmate already tried this and it made no difference. Instead, she tethered her computer to her personal mobile and this used all her free data on her phone and meant she was not able to use any of her apps for personal use.

Case study 2: Philip, previously unemployed, had to upgrade his broadband package to be able to work from home in a rural location

Low financial resources
Low access to support
Poor physical environment

Philip is 65 and lives with his partner in rural Lancashire. He was previously unemployed but at the time of this research was working from home on a short-term contract for an agency recruiting staff for the NHS to administer the Covid vaccine. His employer promised to provide a laptop to undertake this work but this did not happen so Philip had to buy one himself as his old one was too slow and had insufficient memory. He also needed to pay to upgrade his broadband package to get sufficient connectivity as he dropped out of meetings initially. Both of these expenses were difficult for him to afford due to his previous unemployment. His connection is still not great as he needs to work out of a shed in the garden to comply with his employer's GDPR requirement for the work to be carried out from a private space.

"Trying to look like I'm 'up to speed' was difficult when the laptop was freezing. I didn't want to look like I had any technology issues. So I had to borrow the money to get a better laptop in the end." Philip, 65

Case study 3: James, found it too difficult to claim a benefits loan online, needed to phone and ask for a paper form instead

Low digital skills
Low financial resources
Additional access requirements

James is 54 and lives with his wife and stepson in rural Caernarfonshire, Wales. He has mental health conditions and low literacy. Both he and his wife receive disability benefits. James prefers to undertake transactions and access services

face-to-face or by phone rather than online as he finds written instructions difficult to understand, especially with respect to government processes. For example, he tried to claim a loan from his benefits online during the pandemic but found the experience to be confusing and traumatic. He phoned the Jobcentre and a member of staff tried to walk him through it but this didn't help. In the end, they had to send him a paper form which he managed to complete. His broadband connection is also poor which affects his ability to stream programmes to relax. He wanted to complain about this but his mental health condition means he finds it difficult to engage with his provider.

> *"I got into such a pickle that I had to phone [the Jobcentre] in the end and even then I was getting into such a mess that I asked them to send me a paper form." James, 54*

Recommendations

The Panel proposes the following practical steps to address some of the issues highlighted by this research:

➢ **Establishing minimum digital access in law**
The pandemic has led to the rapid expansion of the 'digital by default' delivery of services, and we can expect that in many cases, video-based service delivery will continue post-pandemic. This research reveals that access to the digital infrastructure and equipment required to access those services is very unequal. To mitigate this, government should look into enshrining the concept of minimum digital access in law.

➢ **Tighter standards to protect people online**
 People have been forced to access the basic necessities of life, such as work, education, social interactions, shopping and public services, online during the pandemic – many fear that this has left them exposed to fraud, exploitation and other criminality. Governments need to work with regulators to establish and enforce tighter standards to ensure that all members of society can safely use the essential government services they need.

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