



Delivering Digital Participation:

the consumer perspective

The Communications Consumer Panel is an independent panel of experts established under the Communications Act 2003. Its role is to influence Ofcom, Government, the EU and service and equipment providers, so that the communications interests of consumers and citizens are protected and promoted.

The Panel pays particular attention to the needs of older people and people with disabilities, to the needs of people in rural areas and people on low incomes, and to the needs of small businesses, which face many of the same problems as individual consumers.

The Consumer Panel is made up of part-time members with a balance of expertise in consumer issues in the communications sector. There are members representing the interests of consumers in Scotland, Wales, Northern Ireland and England.

Consumer Panel Members are appointed by Ofcom, subject to approval by the relevant Secretaries of State. They are appointed in accordance with Nolan principles and are eligible for re-appointment. The Consumer Panel is assisted by a small advisory team.

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Section 1

Introduction

It is essential that people have the support, confidence, skills and equipment to get online and get the most from the internet. Without this, many will be unable to access the public services, information and entertainment the rest of us take for granted.

Communications Consumer Panel research carried out in 2008 showed that people across the UK believed access to the internet was at a tipping point: moving from being a 'nice to have' to a 'must have'. They expected that in the future, people who did not have broadband access would be at a significant disadvantage as more, and more vital, services were delivered solely online, or provided offline in a way that penalises users through higher cost or lower quality.

Research by Price Waterhouse Cooper, conducted in 2009, showed that those without the internet are already disadvantaged. On average, people who use the internet save £560 a year by shopping and paying bills online and people with basic IT skills earn up to 10 per cent more than their offline counterparts.

The Digital Britain Report, published by government on 16th June 2009, identified a new term, *digital participation*, defined as:

'Increasing the reach, breadth and depth of digital technology use across all sections of society, to maximise digital participation and the economic and social benefits it can bring.'

The report announced the establishment of the Digital Participation Consortium, made up of over 65 representatives from industry and the third sector and chaired by the communications regulator Ofcom.

The National Plan for Digital Participation, published in March 2010, set a target for a 60 per cent reduction in the 12.5 million people who are not currently online, with older people and the less well off a particular focus. To help achieve this reduction the Consortium will lead a social marketing campaign and distribute funding for projects to help people get interested in and learn to use the internet.

To help Government, Ofcom, Consortium members and others increase the number of people using the internet the Communications Consumer Panel has developed a Consumer Framework for Digital Participation.

The views and experiences of consumers are at the heart of the Panel's Consumer Framework for Digital Participation. The Framework is based on extensive research and consultation and takes the consumer perspective,

bringing together all the different things that people need to get online and get the most from the internet.

By putting consumers first, the Framework will enable policy makers and service deliverers to:

- **Highlight the particular needs of different groups:** different groups of people will need different things to help them get online and get the most out of the internet. Using the Framework, the Panel has analysed the evidence to identify the particular needs of different groups, helping ensure that they get the help and support that is right for them.
- **Identify gaps and overlaps in current provision:** there are lots of different digital participation projects and initiatives being delivered by many different organisations across the country. Mapping these multiple initiatives against the Framework will identify gaps where people's needs are not being met and overlaps where there is an opportunity for activity to be delivered in a more streamlined, efficient way.
- **Target new provision:** identifying the particular needs of different groups and gaps in current provision will enable new activity to be targeted in a way that achieves the maximum impact with the available resources. The Panel would like to see the Digital Participation Consortium using the Framework to target spending and prioritise action.
- **Assess progress:** the Framework can be used to assess progress and evaluate activity and initiatives against how well they meet consumers' needs. Using the Framework in this way could ensure that the available money is spent in ways that will have a real impact on people's ability to get online and get the most from the internet. The Panel will be using the Framework in 2011 to evaluate progress.

This report introduces and explains the Panel's Framework, summarises the key messages arising from the research and sets out what we believe should be the priorities for those involved in delivering digital participation, including the Government.

We have also published the detailed research on which the Framework, the key messages and the Panel's recommendations are based. You can read these reports, *The Journey to Digital Participation: a qualitative research report* and *Digital Participation Research Review*, on the Panel's website¹.

¹ The Panel's website address is www.communicationsconsumerpanel.org.uk

Key messages: summary

- **People must see a compelling personal benefit:** just bringing down the price or giving people access to the technology is not enough. To get interested in getting online people have to see a real benefit from being on the internet and believe that this outweighs the perceived effort of getting involved.
- **Many people need end-to end support:** having the right help is crucial. People need support they can call on whenever they need help, whatever they need help with. The people delivering this support should have technical knowledge, be patient and enthusiastic and be available throughout the process of getting online and learning how to get the most from the internet.
- **There is a support gap at the purchase and set up stage:** most of the existing support is focused on helping people develop computer and internet skills. People who decide to get the internet at home also need help choosing the equipment that is right for them and setting that equipment up. This is a particular issue for older and disabled people.
- **There needs to be more focus on the needs of disabled people:** there is relatively little research into what disabled people themselves think are the benefits of and barriers to digital participation. The research that is available suggests disabled people have particular problems due to the lack, or high cost, of accessible equipment and software.
- **Some people may never get online:** there is a relatively small, but highly resistant core of people who will almost certainly never use the internet.

Suggested priorities for action: summary

- **Campaigns to engage friends and family:** friends and family are best placed to know what might 'turn someone on' to the internet and help them to recognise this potential. Targeted messages should encourage friends and family to help those around them get excited about and learn to use the Internet.
- **Embedding the personal benefits in the social marketing campaign:** the Digital Participation Consortium's social marketing campaign should emphasise personal stories, giving examples of unusual ways in which the internet has met people's needs.
- **Setting up buddy networks:** providers of training and support should set up buddy networks to ensure people get the peer to peer support they need. These may be most effective if drawn from those who have recently got online themselves.

- **Providing help and advice to help people choose and set up equipment and services:** this could include consumer information to help people through the process of choosing the right equipment and services, and volunteers trained to help people get set up and connected.
- **Signposting to join up the different sources of help and support:** despite the many different providers, consumers need to be able to easily navigate the different types of support available. Signposting could be coordinated and branded by the Consortium so consumers are able to recognise that all the different activity is part of the same service.
- **More research into the experiences and needs of disabled people:** future digital participation research by Ofcom or the Digital Participation Consortium should include a focus on disabled people.
- **Government action to increase accessibility:** the Government needs to ensure that its own web sites and services are fully accessible, through enforcing current accessibility guidelines and including accessibility requirements in all new contracts.
- **Suitable offline alternatives to online public service delivery:** in planning to deliver public services online only, the Government must put in place a strategy and sufficient resources to provide suitable offline alternatives to those who are unlikely ever to get online.

Section 2

About digital participation

The Digital Britain report, published by government in June 2009, identified a new term, *digital participation*, defined as:

‘Increasing the reach, breadth and depth of digital technology use across all sections of society, to maximise digital participation and the economic and social benefits it can bring.’

The National Plan for Digital Participation was published in March 2010. The plan sets a target for a 60 per cent reduction in the 12.5 million people who are not currently online, with older people and the less well off a particular focus. It also puts forward ideas about how to use social marketing techniques and targeted outreach to increase the numbers of people going online. This work will be led by the Digital Participation Consortium, which is made up of over 60 representatives from industry and the third sector and chaired by the communications regulator Ofcom. Up to £12 million of public money has been allocated to fund the social marketing campaign and projects to help people get interested in and learn to use the internet.

The role of the Communications Consumer Panel is to influence Ofcom, Government, the EU, and service and equipment providers, so that the communications interests of consumers and citizens are protected and promoted. The Panel has a particular responsibility to champion the interests of vulnerable consumers, including older people, those on low incomes and those with a disability. These groups are among the least likely to use the internet. The Panel is therefore committed to ensuring that those who are currently digitally excluded have the help they need to get online and get the most from the internet.

To help those involved in delivering digital participation, particularly Government and Ofcom, the Panel has developed a Consumer Framework for Digital Participation. The Framework sets out what people need to get online and get the most out of the internet.

The Framework was included in the Government’s National Plan for Digital Participation and can also be found on the website of the Digital Participation Consortium².

² The address for the Digital Participation Consortium is <http://www.digitalparticipation.com>

Why digital participation is important

Communications Consumer Panel research carried out in 2008 showed that people across the UK believed access to the internet was at a tipping point: moving from being a 'nice to have' to a 'must have'.

The research participants expected that in the future, people who did not have broadband would be at a significant disadvantage as more, and more vital, services were delivered solely online, or provided offline in a way that penalises users through higher cost or lower quality. They anticipated that people would miss out on a wide range of services including: shopping, banking, school work, public services, and TV and other content.

Research by Price Waterhouse Cooper³, conducted in 2009 on behalf of the then Champion for Digital Inclusion Martha Lane Fox, showed that disadvantage is already occurring. On average, people who use the internet save £560 a year by shopping and paying bills online and people with basic IT skills earn up to 10 per cent more than their offline counterparts.

The gap is likely to increase as both government and private companies seek to maximise the efficiency savings the internet can offer. The same research estimated that the potential economic benefits of bringing all those who are currently digitally excluded online is in excess of £22 billion, brought about through: a mixture of improved education and employment outcomes; improved health and well being outcomes; efficiency savings for public service providers; plus potential benefits for consumers able to purchase a wider range of products at lower prices.

As this change accelerates, and in particular as government seeks to move public services online, it will be increasingly important to ensure that people are not left behind. This means ensuring people have the motivation, skills, access and support they need to get online and get the most from the internet.

³ The research report is available at http://raceonline2012.org/sites/default/files/resources/pwc_report.pdf

Section 4

A consumer framework for digital participation

To deliver digital participation two things are crucial:

- **Start with the consumer:** we will not provide people with the right help and support unless we understand the perspective of the consumer.
- **Take a holistic approach:** understanding the issues from a consumer perspective will help make sure that we see the problem in the round. Policy makers or advisors often come to discussions about digital participation from different, usually partial perspectives, and with prior agendas, for instance, a concern about illegal file sharing, or child safety, or media literacy or some aspect of consumer protection. These are all relevant concerns, but they result in a piecemeal approach that leaves important things out.

The views and experiences of consumers are at the heart of the Panel's Consumer Framework for Digital Participation, which is shown in Figure 1. The Framework takes the consumer perspective, bringing together all the different things that people need to get online and get the most from the internet.

The Framework is based on a review of existing policy and academic research undertaken directly with citizens and consumers between January 2005 and April 2010. The review of this research is published as a separate report alongside this one.

The Framework was tested and validated with new research, commissioned by the Panel for this purpose and published alongside this report. It was also tested and developed through extensive consultation with experts from central and local government, the voluntary sector and academia.

The framework does not prioritise people's different needs and requirements and is not intended to suggest that their journey towards digital participation will be linear; people will have different needs at different times depending on their lifestyle, whether they are using the internet at home or elsewhere, and the ways in which technology changes and develops.

Figure 1: The Consumer Framework for Digital Participation



Section 5

Using the consumer framework

By bringing all of people's digital participation needs together in one place, the framework allows policy makers and service providers to do a number of important things:

1. Highlight the particular needs of different groups.
2. Identify gaps and overlaps in current provision.
3. Target new provision.
4. Assess progress.

Highlighting the particular needs of different groups

Different groups of people need different things to help them get online and get the most from the Internet. We have demonstrated this in the Panel's Research Review, published alongside this summary document. In this we have looked in detail at the views and experiences of a number of different sub-groups and mapped these against the Framework. The groups that we have looked at are:

- Older people (65 and over);
- Young people (16-24);
- Parents;
- Disabled people;
- People on low incomes; and
- People in rural areas.

This approach is illustrated by the two versions of the framework below. The highlighted boxes in Figure 2 indicate the areas where the evidence shows that older people are particularly likely to need help. The highlighted boxes in Figure 3 show where younger people are likely to need help. This clearly shows that older people are particularly likely to need help in a wide range of areas across the framework. This is in contrast to young people, who are much less likely to

say they need help, with the exception of support to help them manage the risks of the internet.

Figure 2: The Consumer Framework: older people

What older people need to get online and get the most from the internet

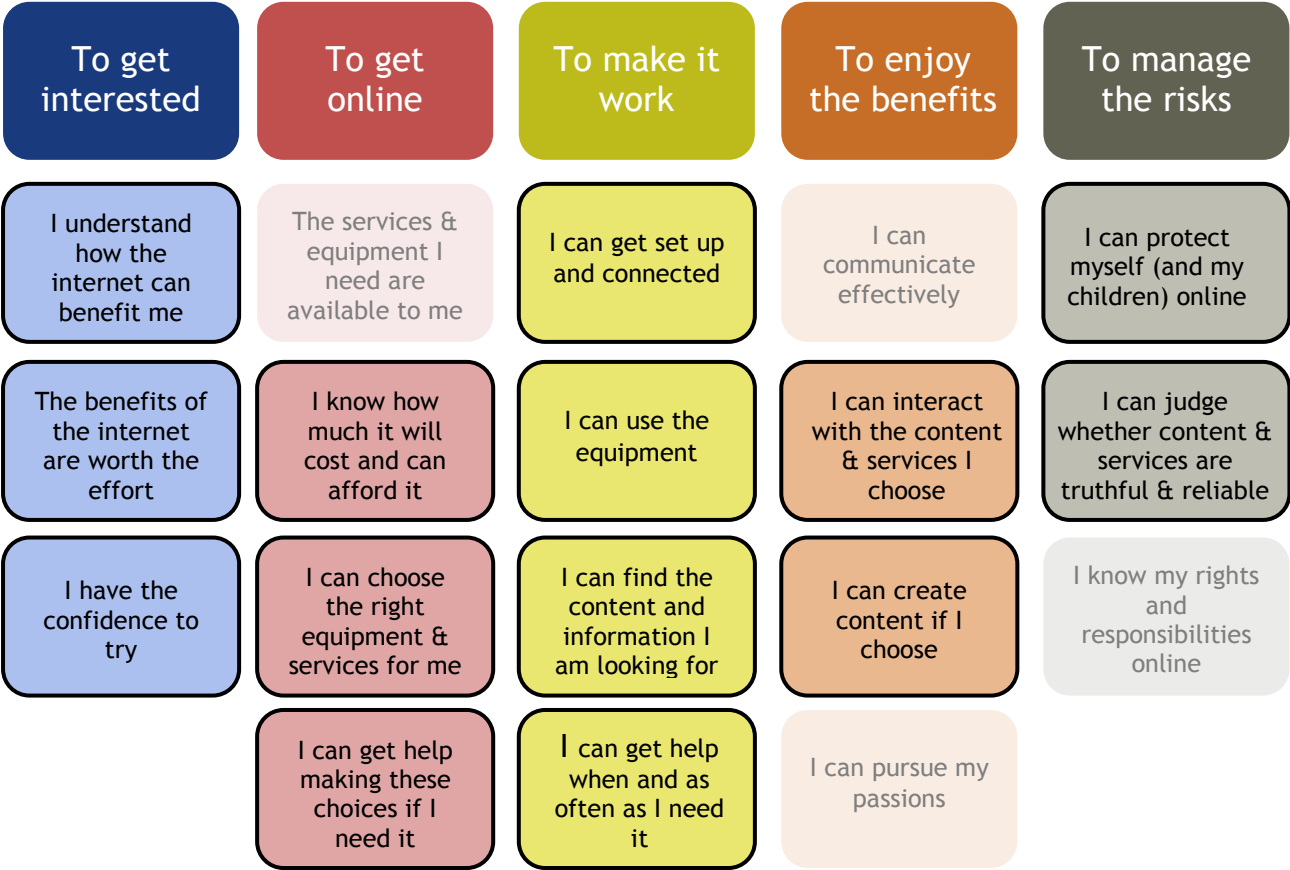


Figure 3: The Consumer Framework: young people



Using the Framework in this way can identify the barriers that different groups face and what kind of help and support they need. Similar analysis could also be done at a more micro-level. Charities or third sector organisations can use the framework as a tool: gathering evidence on the needs of their client group, mapping this against the Framework and identifying the areas their client group will need help with.

Identifying gaps and overlaps in current provision

The digital participation landscape is complex. There are over 65 members of the Digital Participation Consortium, the Government’s National Plan for Digital Participation lists nearly 100 different projects and initiatives and the Consortium’s website lists 105. There is also a wide range of projects and initiatives being delivered by charities, local government and others not currently within the scope of the Consortium.

The breadth of this activity is exciting but can also be confusing. Organisations delivering digital participation initiatives are not always aware of, or able to

coordinate with, others doing similar things. This can mean that effort is duplicated and opportunities to share knowledge are missed. The proliferation of initiatives can also be confusing for consumers, making it difficult for them to identify which support is right for them.

Setting up the Consortium has been an important step in increasing coordination and communication. We encourage the Consortium to use the Framework to help it identify gaps and overlaps in current digital participation activity.

The Framework is a good way of mapping existing support and provision against the range of people's needs. This can be done in different ways. For instance, it is possible to map all the provision in a particular geographical area or available to a particular group. Mapping these multiple initiatives against the Framework would enable the identification of gaps where people's needs are not being met and overlaps where there is an opportunity for activity to be streamlined.

Targeting new provision

Identifying the particular needs of different groups and the gaps in current activity will help to target new provision, ensuring that priority is given to initiatives that will plug gaps, reach the largest number of people or deliver to those groups who are most in need. This is particularly important in the current funding climate; it is vital that new activity achieves the maximum impact with limited resources.

We would like to see the Digital Participation Consortium use the Framework in this way to ensure that it is making the best use of the available public funding and the time and resources of its members.

Using the Framework to target new provision can also be useful for others developing new initiatives or services, including central or local government and voluntary or community sector organisations.

Assessing progress

Bringing together all the different consumer needs in one place means that the Framework can also be used to assess progress. Activity and initiatives can be evaluated against the Framework, highlighting which needs are being met and areas where more still needs to be done. This will help to ensure that money is spent in ways that will have a real impact on people's ability to get online and get the most from the Internet. The Panel will be using the Framework to assess progress in 2011.

Section 6

Key messages

There are a number of clear and compelling messages that emerge from our research and evidence review. These are:

1. People must see a compelling personal benefit.
2. Many people need end to end support.
3. People need help with purchase and set up.
4. There needs to be more focus on the needs of disabled people.
5. Some people might never get online.

People must see a compelling personal benefit

The research clearly shows that just bringing down the price or giving people access to the technology is not enough. Even if people have the internet at home they do not always use it. While in quantitative research people without the internet often cite cost as a primary barrier, qualitative research shows that there are also complex emotional barriers. People may be embarrassed or fear making a fool of themselves. They may lack confidence in their ability to learn new things or dislike going outside their comfort zone. For many these fears are magnified by the perceived risks of the internet and people often cite negative media coverage about issues such as fraud or online paedophilia. In some these fears are manifested as defensiveness and this group can be actively hostile towards the internet.

In order to switch this uninterested audience onto the internet, they must be able to see a personal benefit and be convinced that they are missing out or that the internet will significantly improve some aspect of *their* life. This is something they will often need help with. Generic benefits are not enough. It has to be personal. This can be a challenge because:

- it requires an intimate understanding of what makes each individual tick;
- the perceived benefit must be seen to outweigh the perceived effort required; and
- often individuals don't *want* to see the benefits.

The challenge therefore lies in helping people to see that the internet has something to offer that is sufficiently compelling for them to overcome often substantial barriers.

Many people need end-to-end support

The research clearly shows that having the right help is crucial. Help to learn the basics of using a computer and the internet is important but it is not enough. People also need help:

- understanding the benefits the internet can bring to their lives;
- deciding to take the plunge;
- choosing and setting up the equipment;
- learning how to use it effectively;
- having somebody to turn to when they get stuck;
- striking the right balance between benefits and risks; and
- achieving their goals and being inspired to broaden their repertoire online.

Without the right support even those who have already begun their digital participation journeys can suffer, becoming hesitant or reluctant users, or even giving up altogether.

Friends and family have a role to play, but the research shows that they can be a barrier as well as an asset. This can be because: they act as ‘proxy users’, completing tasks for their loved ones online and reducing the need for people to learn to use the internet themselves; they lack patience or knowledge; or in the case of children, they see it as a good opportunity to make fun of mum or dad.

More formal help in the form of courses, taster sessions and drop in centres is valuable but does not reach everyone and often only covers some of the elements described above. This means people have to go to different places to access the different kinds of support they need. Formal support, particularly courses or classes, can also be perceived as intimidating and too much like school.

Many people would therefore benefit from having an internet buddy, a single source of support they could draw on throughout their digital participation journeys. This would not replace the need for other kinds of support but would help reinforce any formal learning and provide a source of advice, encouragement and inspiration.

The ideal buddy would have the following qualities:

- Technical knowledge;
- Availability;
- Patience; and
- Enthusiasm.

There is a support gap at the purchase and set up stage

The majority of existing support is focused on helping people develop computer or internet skills. However, the research shows that people who decide to get the internet at home also need help choosing the equipment that is right for them and setting that equipment up.

This is true of almost everybody, but is a particular issue for older and disabled people, who may find it harder to get to the shops and are less likely to feel that the retail environment is set up to meet their needs. They also may not be able to manage the bending, carrying and lifting required to set equipment up at home.

There needs to be more focus on the needs of disabled people

There is relatively little research into what disabled people themselves think are the benefits of and barriers to digital participation. The research that is available, as well as the experience of experts working in this area, suggests that in addition to many of the other barriers experienced by non-disabled people, disabled people have particular problems due to the lack, or high cost, of accessible equipment, software and interfaces.⁴

Some people might never get online

The research suggests that there is a relatively small, but highly resistant core of people who will almost certainly never use the internet. These people are often, although not exclusively, older. They generally display deeply entrenched anti-internet sentiments and a conviction that the effort required to get online vastly outweighs any benefit they might gain from it.

⁴ See, for example, the Consumer Expert Group report, available at <http://www.culture.gov.uk/images/publications/CEGreport-internet-and-disabled-access2009.pdf>

Suggested priorities for action

Setting these messages against the consumer framework clearly shows that there are some areas of the framework that are not being sufficiently addressed by current activity, and others that could be more effectively addressed if current activity was modified to better meet people's needs. Other individuals and organisations will have exciting, creative ideas about how these needs can best be met. Below, we have set out our ideas about how these gaps could be addressed.

Campaigns to engage friends and family

Helping a non-user find a compelling, personal hook requires intimate knowledge of what makes someone tick. Engaging friends and family is therefore crucial in generating demand among current non-users. Those who do not access the Internet are often surrounded by others who do, and whose lives have been changed and enhanced as a result. Their role in igniting an initial interest is particularly important, as they know the person in question and understand what is likely to appeal to them.

Targeted messages should encourage friends and family to help those around them get excited about and learn to use the Internet. The Pass IT On campaign⁵ is already pushing this message, and their work in this area should be supported.

The social marketing campaign being developed by the Digital Participation Consortium could also play an important role in delivering these messages.

Embedding the personal benefits in the social marketing campaign

The social marketing campaign should emphasise personal stories, giving examples of the different ways in which the internet brings benefits to individuals. Messages could include:

⁵ More information about the Pass IT On campaign is available at <http://helppassiton.co.uk/get-someone-interested.html>

- **People like you use the internet.** The internet is not just for young people, the ‘chattering classes’ or social-networking addicts. Every day, normal people use the internet to help them in their day-to-day lives in countless ways.
- **The internet can meet people’s needs.** Case studies illustrating how unlikely internet users found their compelling ‘need’. The goal would be to challenge assumptions about the internet by demonstrating some of the more unusual ways in which the internet has changed people’s lives.
- **Making progress online can be faster than you think.** Most new users underestimate their own capacity for getting to grips with the internet and imagine that seasoned internet surfers use it in highly technical, advanced ways which are far beyond their comprehension. Highlighting that the majority of internet usage is less complex than they think will help demystify it and reduce the perceived effort required.

Setting up buddy networks

Buddy networks could be set up to ensure people get the support they need. These could be set up by providers of training and support, local government or the voluntary and community sector. They could be composed of existing support workers or volunteers already working with the people least likely to be online, but might be most effective if drawn from those who have recently got online themselves.

When setting up these networks, care should be taken to ensure that they also include people who understand the particular support needs of disabled people.

Providing help and advice to help people choose and set up the equipment and services

Help and information is needed to help people choose the services and equipment that are right for them. This could also be useful for buddies, or friends and family who are supporting somebody to get online. The Digital Participation Consortium, technology producers and retailers could work together to develop and distribute this information. Distribution networks could include libraries, post offices, UK Online Centres, Citizens Advice Bureaux and retail outlets. This information could include:

- example questions to help consumers know what to ask as they navigate the retail experience, possibly based on the digital switchover model⁶;

⁶ To see questions distributed to consumers during digital switchover go to http://www.digitaluk.co.uk/_data/assets/pdf_file/0003/8274/Consumer_advice_power_questions.pdf

- jargon buster guides, clearly explaining the different terms and concepts consumers need to understand to make the right choices, for instance the difference between a PC and a Mac, explanations of key terms like hard drive or operating systems, and information about different sorts of anti-virus software; and
- decision trees with questions about people's lifestyles and needs to help them identify the equipment and services that are right for them.

Volunteers could play an important role in helping people choose and set up equipment. For older people and people with disabilities this may also include physically getting to the shops and moving equipment into place.

Many of the staff of commercial ICT companies will have the skills and knowledge to help people set up equipment. As part of the Pass IT On campaign these companies could encourage their staff to volunteer either to set up equipment themselves or to train existing volunteers or support workers from organisations who have contact with those most likely to need help.

Retailers also have an important role to play. They could make the consumer information described above available in their stores and on their websites; train their staff to help customers use that information; and offer a set-up and connection service, ideally with post-set up support, to those customers who are prepared to pay an additional fee. Our research shows that these are services consumers would value, and this could be an opportunity for high street retailers seeking to compete in a crowded market.

Retailers could also make a difference by training staff in the particular needs disabled people are likely to have so they are able to provide advice and support. This could include: information about existing adaptive technologies; simple adaptations people can make themselves to enable them to use mainstream equipment, for instance the use of lap trays; and details of more specialist support agencies if needed.

Signposting to join up the different sources of help and support

The wide variety of help and support needed by consumers means that there will inevitably be many different providers, with different types of offering. Consumers need to be able to easily navigate the different types of support available. Signposting could be coordinated and branded by the Consortium, and delivered by its members, so that consumers are able to recognise that all the different activity is part of the same service and that there will be something available that will meet their different needs.

More research into the experiences and needs of disabled people

We recognise that researching the needs and views of disabled people can be difficult. However, more work is needed. Future research by Ofcom or the Digital Participation Consortium to measure levels of digital participation and

understand views and attitudes in this area should include a focus on disabled people.

Government action to increase accessibility

Government needs to ensure that its own sites and services are fully accessible. The new Government should, as a matter of priority, ensure that:

- All public sector websites and online information or campaigns meet its own accessibility guidelines, with priority given to websites that deliver public services.
- All new online services meet the highest accessibility standards and that these are built into sites and specifications from the beginning of the project.
- All public sector procurement of software, hardware or online services specify accessibility requirements in the contract.

Suitable offline alternatives to online public service delivery

The fact that there are some people who might never go online is particularly important given the growing interest in the potential savings to be made by delivering some public services online only. If the Government decides to move towards this, it must have a strategy in place to provide suitable offline alternatives for this group.

This will either require it to retain some dedicated frontline staff to deliver services, or to work with intermediaries who can access services on behalf of people who are not online. Intermediaries could include:

- existing support workers, for instance district nurses, care home workers, sheltered housing wardens;
- volunteers or outreach workers from voluntary and community sector groups;
- staff at Citizens Advice Bureaux or similar advisory organisations; and
- Post Office staff.

However, additional funding would be needed to enable these groups to fulfil this role effectively. In addition, any intermediaries fulfilling this role would have access to the personal and sensitive information of potentially vulnerable people. Government would need to develop and implement safeguards to protect people from exploitation in these circumstances.

Next steps

The internet will continue to shape the world in which we live in all sorts of ways, influencing the way that most of us communicate, acquire information, access private and public services, and entertain ourselves. We believe that these opportunities should be available to everyone. The Panel will therefore be continuing to take a keen interest in the digital participation agenda. We will be:

- working with government, the Digital Participation Consortium and others to encourage them to use the Framework to identify overlaps, deploy resources more efficiently and address the key gaps in provision identified in our research;
- monitoring what action is being taken to deliver digital participation; and
- in 2011, using our framework to assess how much progress has been made in addressing the full range of people's digital participation needs.

Communications Consumer Panel

Riverside House

2a Southwark Bridge Rd

London SE1 9HA

contact@communicationsconsumerpanel.org.uk

Tel: +44 (0)20 7783 4021

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