COMMUNICATIONS CONSUMER PANEL

Bridging the Gap:
Sustaining online engagement

futuresight

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Contents

Section 1

Foreword

This is a report from the Communications Consumer Panel, a statutory body set up to provide independent advice on communications matters to government, Ofcom and other interested parties. Since its creation in 2004, a major objective of the Panel has been to see the maximum possible number of people connected to the internet and making use of all that it offers. In 2010, the Panel developed a Consumer Framework for Digital Participation[1] to help government and others increase the number of people using the internet. Against this background, the Panel has commissioned new research to consolidate stakeholders' experiences and learning in supporting online participation among people who are less digitally engaged[2], and also to gather information about supporting people to take the next steps online. Drawing on this research, this report details the Panel's clear recommendations to government and others.

In April 2009, the European Commission noted that "the internet has become a basic utility for homes and businesses in the same way as electricity or water"[3]. In 2010, the Digital Agenda built on this, stating: "As more daily tasks are carried out online … using the internet has become an integral part of daily life for many Europeans." Referring to those Europeans not online, and the professional ICT skills shortage, the Commission stated that: "these failings are excluding many citizens from the digital society and economy and are holding back the positive impact that ICT can have on productivity growth."[4]

In 2012, 22% of the UK adult population – eleven million people - still do not use the internet at home[5]. In the Panel's view:

- the challenge to increase participation is underestimated;
- meeting the challenge is underfunded; and
- people who remain unable to access online services will suffer increasing detriment if the challenge isn't met.

[1]To help government and others increase the number of people using the internet, the Panel developed a *Consumer Framework for Digital Participation*. http://www.communicationsconsumerpanel.org.uk/smartweb/digital-participation/the-consumer-framework-for-digital-participation See Section 11.5 for more detail.
[2]Throughout this report, the term 'less digitally engaged' is used to refer to people who do not regularly use the internet or have a narrow range of use
[3]http://ec.europa.eu/information_society/newsroom/cf/itemdetail.cfm?item_id=4838
[4]http://europa.eu/rapid/pressReleasesAction.do?reference=MEMO/10/200&format=HTML&aged=0&language=EN&guiLanguage=en
[5]Ofcom (2012) Technology Tracker Quarter- Main Set. Ist October – 10th December 2011 and ONS Annual Population Survey. Oct 2010 -Sep 2011.
http://stakeholders.ofcom.org.uk/binaries/research/statistics/2012jan/Ofcom_Technology_Tracker_Wa3.pdf

To seek solutions to these challenges, the Panel commissioned research among people who are less digitally engaged, and has reached the following conclusions:

1. For government to be able to maximize growth and fulfil the Digital by Default initiative, there needs to be a clearer and more comprehensive policy on take-up and use of, as well as access to, broadband.
2. To enable this, there is a pressing need to strike a better balance between funding for broadband roll-out and funding for ongoing support to enable people to take full advantage of the benefits of the online world.
3. To ensure that progress is made, it is vital that initiatives are open and accountable and that clear targets are put in place for take-up and use, based on an agreed definition of what constitutes an 'active internet user' for these purposes. Closer co-ordination between initiatives across the UK, and an evaluation framework, would facilitate the accurate assessment and monitoring of progress.
4. The Panel considers that the frequently-quoted and widely-adopted measure of 'those who have ever/never used the internet' is not helpful for policy development. Progress should be measured by ongoing use, not by initial access alone. A more appropriate measure of people's ability to function online would be whether they have gone online themselves in the past month, together with an assessment of the breadth of their internet use.
5. Messages designed to encourage people to go online must acknowledge that people make an emotional and financial investment in going online. The messages need to explain online benefits in a language that connects with people's everyday life.
6. The Panel encourages suppliers to undertake the development of introductory low priced/low-risk products, teamed with low-cost broadband access, initially without long-term commitment, to reduce risk and promote trialling.
7. The tactics used to reach people who are not yet online need to be re-thought; and it is important that there is co-ordination between stakeholders, and agreed strategic aims. The potential role of local authorities, housing associations, employers and other related agencies and workers in the community (e.g. care workers) should be fully exploited, to embed awareness and an understanding of the possibilities online.
8. The Panel highlights the fact that the use of simpler technology, personalised support and emphasising the transferability of skills can bring real benefits for users and enable people to understand the usefulness of the internet.
9. The Panel strongly supports the drive to make websites simpler, designed around user needs and experience rather than those of the provider.
10. The Panel encourages coordinated overall support for agencies by Go ON UK, and a collaborative exchange of information. This would ensure a consistent message, and bring cost efficiencies for front-line agencies, to enable them to undertake more outreach activity.

Section 2

Executive summary

2.1 The context

The government's broadband strategy[6] aims for 90% of UK homes and businesses to have access to superfast broadband by 2015, and has a commitment to ensure that virtually all homes will have access to a minimum level of service of 2Mbit/S by the same date. The devolved administrations have also funded nation-specific projects and set additional targets.

The European Commission target is for all EU citizens to have access to 2Mbit/S by 2013, 100% access across Europe to at least 30Mbit/S by 2020, and for 50% of EU citizens to subscribe to 100Mbit/S services by the same timescale.

The government has allocated £530m for the roll-out of superfast broadband and is investing more in super-connected cities, as part of the £100m investment announced in the 2011 Autumn Statement. An additional £50m is being invested to fund a second wave of ten smaller super-connected cities.

The internet contributes more to the UK's GDP than to that of any other G20 country. It is predicted to grow 11% a year to reach £221bn by 2016[7]. It is estimated that a rise in broadband penetration of 10% can lead to a 0.9%-1.5% boost in GDP per head[8].

Twenty-two per cent of the UK adult population – about eleven million people - do not use the internet at home[9].

An increasing number of commercial services are available only online; or are delivered offline in a way that penalises users, through high cost or lower quality; and there is a drive for public services to be digital by default[10]. Those people still offline will be at an increasing disadvantage - they risk being left behind.

[6] http://www.culture.gov.uk/publications/7829.aspx
[7] Boston Consulting Group Jan 2012 Boston Consulting Group Jan 2012.
[8] *Costs and Benefits of Superfast Broadband in the UK* by Paolo Dini, Claire Milne and Robert Milne, LSE; http://www.netcracker.com/smartrevenue/downloads/LSE-Superfast-Broadband-Summary-May-2012.pdf
[9] Ofcom (2012) Technology Tracker Quarter- Main Set. Ist October – 10th December 2011 and ONS Annual Population Survey. Oct 2010 -Sep 2011.
[10] channel shift that will see public services increasingly provided digitally 'by default'

Three years after the *Digital Britain* reports, Go ON UK notes that "the UK is struggling to exploit the broader benefits of the internet as digital skills become increasingly vital tools to access education, information, jobs, consumer savings and social contacts"[11].

Although 78% of the adult UK population now use fixed or mobile internet access at home[12], there are still significant variations in levels of internet take-up and use within the population. Older and disabled people, and those in low-income households, are much less likely to use the internet at home. In common with many other industrialised countries, the UK is experiencing a slow-down, almost a plateau, in internet take-up[13]. In order to be able to take advantage of the variety of online services and have the confidence to complete official processes online, people also need to be comfortable with a broad range of internet use. Those aged 55+ years and 65 years+, and from DE households, are significantly less likely to carry out a range of activities online[14].

Those people not yet online face exclusion at a variety of levels: keeping in contact with friends/family, saving money on goods and finding out about services. The Panel considers it essential that people have the support, confidence, skills and equipment to get online and get the most from the internet. Without this, people will be unable to access the public services, information and entertainment that most take for granted.

The Panel considers that there is a serious risk that public policy currently underestimates the challenge of the task of ensuring that the vast majority of people are brought online, and are enabled to use the private and public sector services that are, or will be, online, in accordance with the Digital by Default agenda.

This has implications for funding, growth and policy, in terms of how far and how fast policy makers can push people towards online-only options, and in relation to the provision that is needed to help draw people online.

In order to benefit from superfast broadband, the drive to attain greater speeds must be complemented by work to convince people who are less digitally engaged of the value of going online, and to enable them to gain the necessary skills to exploit fully the advantages of staying online. The UK may also find that there will not be an adequate return on investment (ROI) in superfast broadband if a significant minority of the UK adult population continues not to use the internet at home.[15]

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[11] http://www.go-on-uk.org/category/about/
[12] Ofcom Technology Tracker October – December 2011 http://stakeholders.ofcom.org.uk/binaries/research/statistics/2012jan/Ofcom_Technology_Tracker_Wa3.pdf
[13] *International Communications Market Report*, Ofcom 2011 http://stakeholders.ofcom.org.uk/binaries/research/cmr/cmr11/icmr/6_-_telecoms.pdf
[14] *Adults Media Use and Attitudes* report, Ofcom 2012 http://stakeholders.ofcom.org.uk/market-data-research/media-literacy/archive/medlitpub/medlitpubrss/adults-media-use-attitudes/
[15] 78% of UK adults use home internet access, 2% have home access but don't use it and 20% don't have home internet access. Ofcom Technology Tracker, October – December 2011.

Given the fundamental need to get the vast majority of people online, so that the public sector can make savings from the online provision of services, and so that individuals can gain benefit from easy access to public services and commercial propositions, there is a pressing need to strike a better balance between funding for broadband roll-out and funding for ongoing support to enable people to take full advantage of the benefits of the online world.

Near-universal internet take-up is unlikely to happen without significant targeted interventions. Currently, provision of support skews towards individuals who are more disposed towards going online for the first time. Increasingly, initiatives need to adapt to support those who are disinclined to go online, and to support the digital journeys of those who have limited online experience. The campaigns and marketing to support these initiatives will also have to respond to this challenge –a clear overall badge is essential, together with straightforward language that explains the benefits of going online while recognising and addressing the challenges.

2.2 The Futuresight research

Against this background, the Panel commissioned Futuresight to conduct new research to consolidate stakeholders' experiences and learning in supporting online participation among people who are less digitally engaged[16], and also to gather information about supporting people to take the next steps online. Building on existing knowledge, the overall aim was to understand more about the digital participation journey from a range of inter-related perspectives. The primary objective of the research was to understand how people who are less digitally engaged can get the most out of being online and how they might increase the breadth of their internet use to achieve greater digital participation.

The research was qualitative in nature and comprised semi-ethnographic in-home visits among consumers and in-depth individual interviews among stakeholders and front-line staff in training delivery roles[17]. The Panel would like to thank all those who agreed to be interviewed for generously sharing their time and insights.

More specifically, the study involved talking to:

- consumers who are less digitally engaged, to understand how they can get the most out of being online and increase their breadth of use to enable greater digital participation. Previous research had identified various groups who, in different ways, are disengaged, or participating to only a small degree. The Panel wanted to

[16]Throughout this report, the term 'less digitally engaged' is used to refer to people who do not regularly use the internet or have a narrow range of use

[17]Given the breadth and volume of services available across the UK, the research among stakeholders and front-line practitioners is not representative of all feedback on delivery across all services. The aim was to provide a 'flavour' of learning and experience. The findings relate to the views expressed by stakeholders and front-line practitioners represented in this research, and must therefore be considered to be illustrative of the entire sector.

know more about these different types of people so this research was conducted amongst four consumer groups to provide a range of perspectives from people who are less digitally engaged. The groups were: lapsed users, proxy users, narrow users and new users[18].

- stakeholders and front-line staff in training delivery roles, to understand what has worked for them in getting and keeping people online; and
- people who are currently not online, and living in an area of extreme deprivation, in order to explore whether there are any key barriers other than financial deprivation. Glasgow was selected for this research because it has a high level of offline households. Ofcom's 2011 Communications Market Report for Scotland found that take-up is particularly low in Greater Glasgow at 50%[19], compared to elsewhere in the UK.

The findings from this research will be used to ensure that people are supported in ways that are most likely to have a real impact on their ability to get online and get the most from the internet. More widely, the aim is to support initiatives to make the best use of funding.

2.3 Summary of key research findings

This section comprises the key findings from the research conducted by Futuresight, an independent research agency. More detailed findings can be found in Section 4.

Digital participation

ONS[20] reports that 83.7% of the UK adult population have **ever** used the internet. This figure is widely quoted and adopted as a measure of progress in relation to internet use in the UK. While this figure is useful as a measure of people who have never been online, it includes people who may have not used the internet for months or even years and does not evaluate their breadth of use.

Although online access is increasing, the research found that people's breadth of online engagement, rather than access alone, was seen as the key challenge for the future. Relying on 'ever used' as the definition of an internet user risks overestimating the number of active internet users and underestimating the challenge of supporting people's fundamental need to develop long-term engagement once access has been achieved.

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[18]Lapsed users: around 4% of adults are lapsed or ex-users. *Oxford Internet Institute* (2011) Dutton, W.H. and Blank, G. (2011) *Next Generation Users: The Internet in Britain 2011.* Proxy users: an estimated 23% of non-users (or around 5% of all adults) had proxy use of the internet in the last year. *Ofcom* (2012) *UK Adults' Media use and Attitudes Report - March 2012.* Narrow users are defined on the Ofcom Media Literacy Audit as those who carry out 1-6 out of 18 types of online activity, and comprise 21% of all internet users. *One* in ten are newer users (8%).

[19] Q1 2011, http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr11/scotland/4.2

[20]Office for National Statistics: ONS Internet Access Quarterly Update 2012 Q1

Research among stakeholders found that much of the focus to date has been on getting people online rather than developing the skills and participation of those with access.

The five objectives set by the Digital Participation Framework[21] were:

- to get people interested in going online;
- to provide people with information and incentives to get online;
- to provide people with the opportunity to develop the necessary skills, and to know how to get help when required;
- to enable people to identify and manage the potential risks associated with being online; and
- to empower people to make the best use of the opportunities and benefits available online.

As noted above, this research suggests that much of the focus to date has been on the first two objectives above. Success with the remaining three, among people who are less digitally engaged, has been more variable.

Many of the consumers identified by this research are not predisposed to use the internet, and will need more sustained support. A significant challenge remains in reaching consumers who are not predisposed to participating online, and who require a sustained level of support in order to develop their engagement and participation.

Front-line delivery practitioners are held back by a lack of resources and funding. Despite widespread awareness among stakeholders and practitioners of the challenge to increase online engagement, limits on funding and resources inevitably place much of the focus on introducing consumers to the internet rather than providing ongoing support over the course of their journey.

The consumer journey – barriers and drivers

When considering the journey people make in going online and becoming proficient, the research found that there are some key barriers and drivers which contribute to the extent to which people participate.

Barriers

The research suggests that there are two main barriers to participation among people who are less digitally engaged: the 'gravitational' hold of the offline world, and the fear of technology and its complexity.

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[21]To help government and others increase the number of people using the internet, the Panel developed a *Consumer Framework for Digital Participation*. http://www.communicationsconsumerpanel.org.uk/smartweb/digital-participation/the-consumer-framework-for-digital-participation See Section 11.5 for more detail.

The barriers to participation encountered along the journey, not just at the start of it, can be insurmountable without ongoing help.

- **The status quo: the 'gravitational' hold of the offline world:** Many people who are less digitally engaged continue to see the offline world as considerably easier, faster, familiar, more accessible and user-friendly.

- **Fear of technology and its complexity**: For many people who are less digitally engaged, technology (particularly PC-based) is a significant obstacle. Many of these people do not relate to, or identify with, the image and language of technology.

Other important barriers to greater participation are:

Lack of confidence: Many in the sample did not have the skills to use a computer and didn't feel that they were capable of learning these skills. For some, this is linked to low interest and low motivation. For others, it is linked to low self-esteem, empowerment and assertiveness. A few lacked confidence because of literacy issues as well as having no experience of using a keyboard.

Lack of ongoing support: Many participants said that they would need continuing help. The lack of such help would limit the breadth of their participation, and for some, their willingness to stay online. Notably, some do not stay online, or participate fully, despite having ready access to support from friends and family.

Low affordability and priority: A few in the sample had particularly low incomes, and said that the absolute cost of equipment, as well as the ongoing cost of a broadband connection, would be prohibitive. For the majority, low priority rather than low affordability was the issue, i.e. the cost was high in relation to the perceived low benefit of going online and the risk of getting little in return.

Social isolation: Some participants live alone and/or have very limited access to friends, family or neighbours who are online themselves. This absence of positive role models and peer pressure limits their opportunities to develop their online skills and increases the likelihood that they will stop using the internet altogether.

Poor family dynamics: While some people have easy access to others with online experience, e.g. a son, daughter or partner, these people are not always willing or able to help. Poor family relationships can inhibit or prevent participants from asking for help. And a refusal to help can compound the problem, further lowering confidence and reinforcing the feeling of inadequacy, thereby reducing their engagement still further.

Presence of a dominant proxy: Some people in the sample live with others who think it best to go online for them.

Lack of time: Some in the sample lack time, either in absolute terms or in relation to other priorities. This reduces the opportunity for them to develop online skills and experience.

Low awareness of community-based sources of help: Apart from libraries, awareness of outside sources of help was typically poor. When asked to consider, many supposed that outside help was available. But few were inclined to find out for themselves.

Misconception with regard to community-based sources of help: A strong feature among the less digitally engaged is their tendency to think that outside help would be formal classroom-based training, and therefore not suitable for them. They would be afraid of being shown up in front of others because they lack skills and ability.

Drivers

The research identified a number of drivers that influence people to get more out of being online, and broaden and deepen their engagement. As with the barriers, these drivers vary significantly among different types of consumer, depending on their disposition and circumstances:

Tenacity / determination: A minority in the sample were driven by a more determined, confident personality, with a strong predisposition to reach out and take advantage of the support and resources that were available. In return, those giving support tended to respond well; feeling rewarded by seeing the user benefiting from their help.

Ready access to informal, ongoing, one-to-one support: This driver often represented the tipping point between lapsing and developing online participation. Help at the start of the journey was critical; in getting started with using the computer and setting up a broadband connection. Ongoing help was equally important to sustain effort and interest to overcome some of the more significant barriers to use. People valued one to-one support, particularly from a friend or relative, and this was often very effective in pushing them forward to a point where they could start to develop their online engagement by themselves.

Benefits of being online: Interest and motivation to go online is stimulated by a range of financial, social and communication benefits. Awareness of this tends to come initially from friends or family, and/or a more general impression gained from the media.

Relevance to interests: A key driver is a hobby or interest in the offline world that can, in some way, be replicated and enhanced online. Many had sustained their online participation through developing an interest online, particularly if it enhanced their offline interest.

Fear of being left behind: A key driver for many is the fear of being excluded: financially, socially or emotionally. For some, it was important to have a sense of belonging; being able to relate to the online views and experiences of others. Others felt that being online brought them closer to family members, particularly those from a different generation. Others felt driven to participate to avoid ridicule and stigma, worrying that not being online was associated with out-datedness and even incompetence.

Peer pressure: Being encouraged by others to go online was, for some, a relatively strong source of motivation. Others however perceived this as pressure to go online, with friends and particularly family members 'nagging' them to do it.

The consumer types in detail

The research explores what is needed to support four different types of people who are less digitally engaged: lapsed users, proxy users, narrow users and new[22] users. There is a range of barriers and drivers across these groups and delivery solutions should be tailored accordingly.

In addition, the research explored the views of a small group of people who were offline and living in an area of Glasgow which has extreme deprivation.

The majority of people we spoke to are unlikely to engage, despite having access to the internet. A small number were developing their online capability and engagement quite quickly, due to a range of relatively advantageous personal and circumstantial factors.

Lapsed users: These people have used the internet but have stopped. They are likely to have had a poor/weak introduction to the internet and many are now very unlikely to go back online. Some have lapsed because somebody else goes online for them (a proxy).

The loss of a source of ongoing help/support is a major factor for these people and reaching out to lapsed users is difficult - many will not respond to community-based sources of help and support.

Opportunities to reach these people may lie in better signposting to formal, community-based sources of help, and addressing any misconceptions they may have about these sources.

More fundamentally, there need to be more opportunities for incidental exposure to outside help, i.e. informal methods that encourage people to learn (see Section 9.9 for more detail).

Proxy users: These people are not able or willing to access the internet themselves. Instead, they rely on someone else to go online for them. Some actively choose not to go

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[22] The definition of a new user was someone who obtained internet access within the last two years in any location or from home in the last year. Among these users, the research found that people were using the internet in a variety of ways – there was not a cluster around one type of behaviour. Some of these new users had lapsed and were not using the internet at all anymore. Others had given up going online themselves and were doing so via a proxy. Some were still online but making narrow progress while others were making quite significant progress. In order to capture the experiences of this last group, we refer to them in this report as developing users. The report therefore discusses in detail the experience of lapsed users, proxy users, narrow users and developing users.

online, and claim to prefer to be dependent. Others express an interest in going online and would prefer to be able to do so by themselves.

Consideration of the barriers to access suggests the need for better and more immediate access to outside support.

The research suggests that there may be an opportunity to target the people who go online as proxies, rather than the non-users themselves. The research suggests these people may be receptive to clear signposting to outside help as such help would remove their responsibility to go online for non-users. In addition, some proxies also responded well to guidance on how to train and support a non-user. None of the proxies in the sample was aware of the National Digital Champion scheme.

Narrow users: These people have succeeded in overcoming some of the initial barriers to getting online as a result of support in the early stages of their journey. But their participation remains very limited, either by choice, or because of their lack of skill.

Technological complexity is a particularly strong barrier with many complaining that complexity makes online use time-consuming.

Many narrow users need help to use the internet more efficiently, so that they can see the technology as an enabler.

There is also a need to address the misconceptions surrounding outside help.

Developing users[23]: These people have overcome many of the barriers to participation. Many now feel enabled and empowered to continue to develop their capability and to participate fully. Often, they represent strong role models and can influence others around them to go online.

What works well is a combination of sustained, ongoing support, a predisposition to want to learn, and a conviction of the importance of being online.

Many respond well to the offer of outside help but, like other people, have misconceptions about the suitability of such help.

Developing users can act as strong, positive role models, able to influence others and those who have helped developing users can also become digital champions for others.

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[23]The findings reveal that new users are prevalent among lapsed, proxy and narrow users. It is also evident that some participants in the research developed their online capability and engagement quite quickly due to a range of relatively advantageous dispositional and circumstantial factors. We have labelled these people as 'developing'. New users who did not develop their capability as quickly fall into the remaining categories of lapsed, proxy and narrow users.

Offline in an area of extreme deprivation: Our research in an area of extreme deprivation (in Glasgow City) suggests that the barriers to participation are not radically different to those in other areas in the UK. They are, however, more extreme, leading to a much greater divide between those with access and those without.

A key barrier to participation is the attraction of the offline world (i.e. the familiarity, habit, ease, speed and convenience of accessing services through traditional channels). A further key barrier is a lack of support in terms of informal help, positive role models and lack of peer pressure to go online. Cost is a factor but, in some cases, going online is also a low priority not just a question of low affordability.

Delivery

The research explored delivery in the broadest sense: from the views of senior stakeholders at a policy, campaigning and communication level, through to front-line coordinators and practitioners with direct experience of helping people to get online and develop their participation. Participants were asked about what they thought works well now and what is needed to work better in the future - particularly as the task of reaching those offline as well as people who are less digitally engaged becomes progressively more difficult.

Senior stakeholders suggested the following areas for strategic focus in the future:

- Strengthen coordination between key players and partners;
- Do more to encourage partners and front-line organisations to work under a single, recognisable banner.
- Raise people's awareness of resources, to reduce confusion and improve signposting to key front-line resources. Address people's misconceptions about community-based centres and libraries.
- Widen the scope of the policy, to better target resources on developing and sustaining online engagement, catering better for individual differences.
- The government's Digital by Default strategy should place more emphasis on understanding what motivates people to use offline channels; and to mirror this in the design of websites.
- Encourage and support the use of simpler, more user-friendly forms of technology (e.g. 3G-enabled tablets and smart TVs);
- Introduce a stronger degree of evaluation and accountability, identifying what works, to produce a positive and sustainable outcome.

In terms of on the ground delivery, stakeholders and front-line practitioners also highlighted a number of areas:

- The need for a focus on informal, incidental learning
- Making better use of existing offline resources
- Creating informal partnerships and collaboration
- Joining up resources more formally
- Addressing misconceptions about libraries and community centres

- The importance of commercial sponsorship and the role of Corporate Social Responsibility
- The support that can be offered by Digital Champions

Stakeholders and front-line practitioners pointed to approaches that they are using to engage those consumers who are harder to reach. These included:

- Using existing offline resources to make people feel that online is more of a part of their offline world. This involves focusing on the person's environment (i.e. at home or in the workplace) and drawing on resources that are already in place there.

- Developing informal partnerships and methods of collaboration. This will have the advantage of pooling resources, but will also extend reach and improve opportunities to bring front-line resources to harder-to-reach minorities. This sort of informal collaboration can work to increase referrals and signpost people to appropriate help and support

- More formal joining up of services among local government services and authorities. Closer integration of public departments, private sector initiatives and the third sector was felt to have benefits in increasing impact and priority, creating a shared aim and a sense of ownership.

2.4 Measuring success in digital participation

To help government and others increase the number of people using the internet, the Panel developed a *Consumer Framework for Digital Participation*. Published in May 2010[24], this was based on a comprehensive review of research with people at all stages of the digital participation journey, and set out what people themselves said they needed to get online and get the most out of the internet.

The intention was that, by putting consumers first, the Framework would enable policymakers and service deliverers to: highlight the particular needs of different groups; identify gaps and overlaps in current provision; target new provision; and assess progress.

The current research confirms that people's online journeys are long and complex. Starting the journey does not, in itself, guarantee that people will become confident internet users, able to function and interact with services online. They will continue to need support to overcome challenges.

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[5]Delivering Digital Participation: The consumer perspective. http://www.communicationsconsumerpanel.org.uk/smartweb/digital-participation/the-consumer-framework-for-digital-participationCommunications Consumer Panel, May 2010

The elements of the Framework categorised as 'to make it work' and 'to enjoy the benefits' would appear to represent the tipping point for many of those we spoke to in this research. But these elements currently appear to attract less attention and resource than the initial push to get people online. If a user's journey is not supported adequately, the initial investment in training may go to waste. The Panel encourages government and providers to continue to use the *Consumer Framework for Digital Participation* to assess progress made and address gaps.

2.5 The Panel's summary recommendations

Unless fundamental action is taken, the digital divide risks becoming a digital gulf, as the distance increases between those who are online, with access to new services, technology and faster and faster broadband speeds, and those who remain firmly anchored in the offline world.

1. For government to be able to maximize growth and fulfil the Digital by Default initiative, there needs to be a clearer and more comprehensive policy on take-up and use of, as well as access to, broadband.
2. To enable this, there is a pressing need to strike a better balance between funding for broadband roll-out and funding for ongoing support to enable people to take full advantage of the benefits of the online world.
3. To ensure that progress is made, it is vital that initiatives are open and accountable and that clear targets are put in place for take-up and use, based on an agreed definition of what constitutes an 'active internet user' for these purposes. Closer co-ordination between initiatives across the UK, and an evaluation framework, would facilitate the accurate assessment and monitoring of progress.
4. The Panel considers that the frequently-quoted and widely-adopted measure of 'those who have ever/never used the internet' is not helpful for policy development. Progress should be measured by ongoing use, not by initial access alone. A more appropriate measure of people's ability to function online would be whether they have gone online themselves in the past month, together with an assessment of the breadth of their internet use.
5. Messages designed to encourage people to go online must acknowledge that people make an emotional and financial investment in going online. The messages need to explain online benefits in a language that connects with people's everyday life.
6. The Panel encourages suppliers to undertake the development of introductory low priced/low-risk products, teamed with low-cost broadband access, initially without long-term commitment, to reduce risk and promote trialling.
7. The tactics used to reach people who are not yet online need to be re-thought; and it is important that there is co-ordination between stakeholders, and agreed strategic aims. The potential role of local authorities, housing associations, employers and other related agencies and workers in the community (e.g. care workers) should be fully exploited, to embed awareness and an understanding of the possibilities online.
8. The Panel highlights the fact that the use of simpler technology, personalised support and emphasising the transferability of skills can bring real benefits for users and enable people to understand the usefulness of the internet.

9. The Panel strongly supports the drive to make websites simpler, designed around user needs and experience rather than those of the provider.
10. The Panel encourages coordinated overall support for agencies by Go ON UK, and a collaborative exchange of information. This would ensure a consistent message, and bring cost efficiencies for front-line agencies, to enable them to undertake more outreach activity.

Section 3

Context

3.1 Levels of online take-up and use in 2012

Just over three-quarters (78%) of the adult UK population now have, and use, fixed or mobile internet access at home,[25] and are benefiting from a huge range of online services and applications. But there are still significant variations in levels of internet take-up and use within the population:

While 78% of the UK population overall have and use the internet at home, this drops to:

- 51% of those aged 65 – 74,
- 22% of those aged 75 or over,
- 49% of those households with an income less than £11.5K and
- 52% of people with any disability.

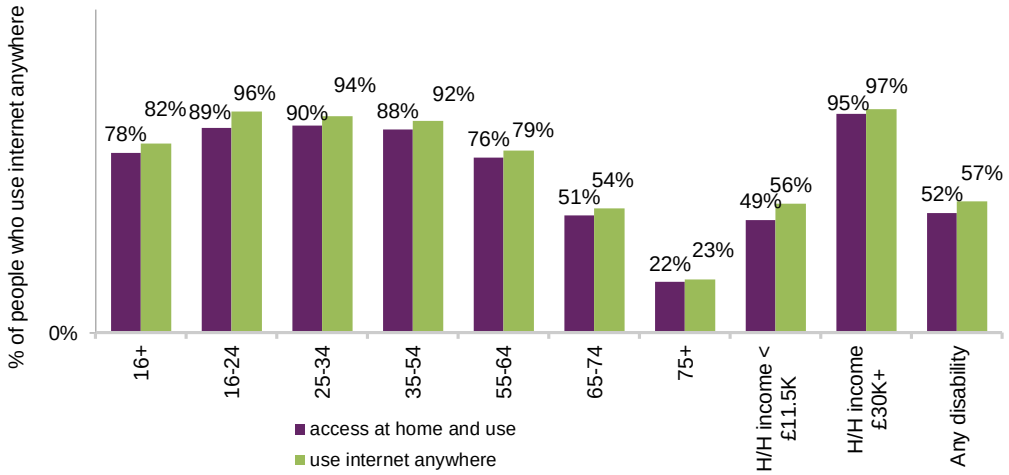
There are also variations across the UK:

- 79% of households in England have internet access, compared to
- 69% of households in Scotland,
- 69% in Wales and
- 70% in Northern Ireland[26].

Those people not yet online face exclusion at a variety of levels – from keeping in contact with friends/family, to saving money on goods or being able to find information about services.

[25]Ofcom Tech Tracker October – December 2011
[26]Ofcom Tech Tracker October – December 2011

Figure 3.1: Internet use anywhere



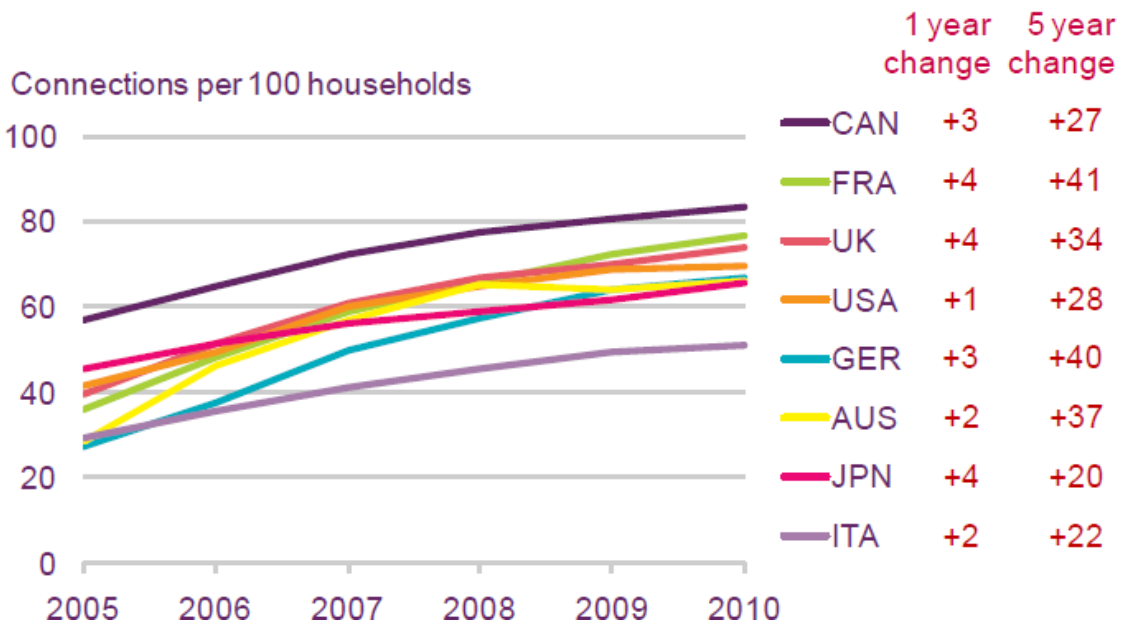
Source: Ofcom (2012a) Technology Tracker Quarter- Main Set. Ist October – 10th December 2011 Q
QE2. Do you or does anyone in your household have access to the internet/ Worldwide Web at HOME (via any device, e.g. PC, mobile phone etc)? (SINGLE CODE) and QE3 (IN6). SHOWCARD Do you ever access the internet anywhere other than in your home at all? IF YES: Where is that? (MULTI CODE)
Base: 2240

The 'digital divide' also affects businesses. According to the Communications Managers Association/Federation of Small Businesses *Internet Opportunity Survey* in 2011, 16% of respondents from the Federation of Small Businesses report that they don't use current generation broadband. Although this is partly explained by geographic availability, the survey found that there was also a lack of knowledge of the benefits of broadband – 27% of those respondents not using current generation broadband reported no business need.

In common with many other industrialised countries, the UK is experiencing a slow-down, almost a plateau, in internet take-up. In 2005, UK broadband take-up stood at 40% of households. From this base, relatively good progress was made, achieving 74% by 2010. But recent research suggests that internet take-up, both in the UK and internationally, is levelling off.[27]

[27]International Communications Market Report, Ofcom 2011http://stakeholders.ofcom.org.uk/binaries/research/cmr/cmr11/icmr/6_-_telecoms.pdf

Figure 3.2: Fixed broadband connections per 100 households: 2005 - 2010



Source: IDATE/Industry data/Ofcom

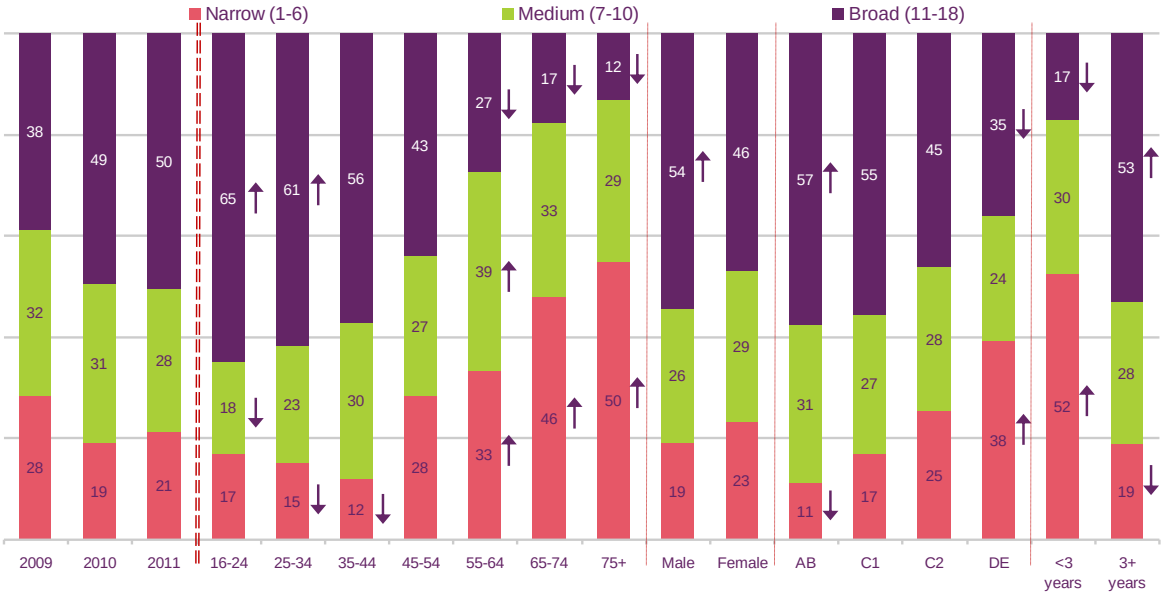
So while issues of internet infrastructure and availability are important, these lower levels of broadband take-up mean that people are at increased risk of exclusion from social and economic benefits, particularly as more public services are put online.

As well as asking people whether they have the internet at home, there is also the question of whether they use it personally, and if so, to what extent. Just over a million people have the internet at home but say that they don't use it[28]. Twenty-three per cent of non-users go online through another person – a proxy[29]. This equates to around 5% of the UK adult population and just under 2.5 million adults[30]. Research from the Oxford Internet Institute in 2011 found that 4% of UK adults are classed as lapsed users – having previously used the internet but no longer doing so[31]. It also found that 10% of people aged between 17 and 19 had stopped using the internet.

[28]Ofcom (2012) Technology Tracker Quarter- Main Set. Ist October – 10th December 2011 and ONS Annual Population Survey. Oct 2010 -Sep 2011
[29]UK Adults' Media Literacy; Ofcom, April 2011
http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/media-lit11/Adults.pdf
[30] *Ofcom*(2012) *UK Adults' Media use and Attitudes Report - March 2012 and* ONS Annual Population Survey. Oct 2010 -Sep 2011
[31]OII 2012 http://www.worldinternetproject.net/_files/_Published/23/820_oxis2011_report.pdf

In order to be able to take advantage of the variety of services available online, and have the confidence to complete official processes online, people need to be comfortable with a breadth of internet use. Even when people are online, they do not all access public information/services, or conduct transactions, and some have continuing concerns about providing their personal data. See Annex D for more information.

Figure 3.3: Breadth of use of the internet: 2009, 2010 and 2011, by age, gender and socio-economic group in 2011[32]



IN14/15 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, multi-coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (1282 in 2009, 1489 in 2010, 1369 in 2011) 216 aged 16-24, 237 aged 25-34, 268 aged 35-44, 183 aged 45-54, 188 aged 55-64, 160 aged 65-74, 117 aged 75+, 678 male, 691 female, 354 AB, 448 C1, 264 C2, 303 DE). 2011 started using under 3 years ago (120), 3+ years ago (1211) . Significance testing shows any change between 2010 and 2011, between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+ , between newer and more established internet users
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to October 2011

Twenty-one per cent of users carry out a narrow range of tasks online (defined by Ofcom's media literacy audit as not having progressed beyond 'basic' online use, i.e. they engage in 1-6 online activities[33] out of a possible 18). Some groups of people – those aged 55+ years and 65+ years, and those from DE households - are more likely to carry out only a narrow range of activities online.

[32]Arrows on chart denote significant change from previous year
[33]UK Adults' Media Literacy; Ofcom, April 2011http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/media-lit11/Adults.pdf

Section 4

Research: background, objectives and methodology

4.1 Background

As part of its work on digital participation, the Communications Consumer Panel developed a *Consumer Framework for Digital Participation,* published in May 2010[34].

Against this background, the Panel commissioned an independent research agency, Futuresight, to conduct new research to consolidate stakeholders' experiences and learning in supporting online participation among low participation groups, and also to gather information about supporting people to take the next steps online. Building on existing knowledge, the overall aim was to understand more about the digital participation journey from a range of inter-related perspectives.

4.2 Research objectives

The primary objective of the research was to understand how people who are less digitally engaged can get the most out of being online and how they might increase the breadth of their internet use to achieve greater digital participation.

The key issues that the study sought to address were:

- What works to get (and keep) people online?
- How can people get the most out of being online?
- What works best in encouraging people's breadth of participation?
  (From basic online use to broader online use and confidence; enabling people to be active, engaged consumers/citizens online)

[34]*Delivering Digital Participation: The consumer perspective*. Communications Consumer Panel, May 2010

- What factors lie behind low levels of digital participation? To what extent are they economic, functional or emotional?
- What barriers to digital participation exist among people who are offline in an area of extreme deprivation?
- In addition, the interviews with the key stakeholder and front-line practitioners sought to explore their thinking on digital participation.

The findings from different research participants in relation to these issues are to be found throughout the report. In general terms, Sections 5 and 9 are concerned with policy, strategic, delivery issues and responses, while Sections 6, 7 and 8 are concerned with consumer responses.

4.3 Methodology

The research was qualitative in nature and comprised ethnographic in-home visits among consumers and in-depth individual interviews among stakeholders and front-line staff. The Panel would like to thank all those who agreed to be interviewed for generously sharing their time and insights.

People who are less digitally engaged - consumer groups

To date there has been a focus on people not yet online, so the focus of this element of the study was on people who are online but not significantly digitally engaged. Research from the Oxford Internet Institute and Ofcom had identified various groups who, in different ways, are disengaged, or participate only minimally. The consumer groups were selected to provide a range of perspectives, to allow broader exploration of the factors underlying low digital participation and to provide a comprehensive picture of the digital participation journey. The four segments represented in the research were defined as follows:

1. Lapsed users: Have had some (typically very basic) online experience but no longer use the internet.
2. Proxy users: Rely on a proxy to access the internet on their behalf.
3. Narrow users: Currently have access to the internet. Have not progressed beyond 'basic' online use, i.e., have ever engaged in only 1-6 online activities[35] out of a possible 18.

[35]UK Adults' Media Literacy; Ofcom, April 2011http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/media-lit11/Adults.pdf

4. New users: Currently have access to the internet. First obtained access within the last two years, anywhere, or within the last 12 months in the home.[36]

A total of 48 consumers (12 per digital engagement segment) were selected randomly from 14 urban, suburban and rural locations across the United Kingdom. See Annex B for a detailed description of the method and Annex C for a detailed breakdown of the sample.

Offline consumers in an area of extreme deprivation

A second consumer element of the research was conducted in Glasgow. Fourteen individual in-depth interviews were conducted among offline consumers living mainly in Glasgow East. Details may be found in Annex B and Annex C.

Senior stakeholders and front-line delivery practitioners

In order to provide a detailed understanding of the digital participation journey, in terms of policy and delivery, a total of 44 interviews were conducted: 24 among senior stakeholders and 20 among front-line practitioners and digital champions.

Participants were selected from a range of areas:

- National and government policy
- Academic research institutes
- Central and local libraries
- Voluntary and community organisations
- Skills and training providers
- UK online centres
- Digital Champions
- Niche providers
- Local authorities and housing associations
- Commercial providers (involved with campaigning and CSR programmes)
- Digital service providers including broadcast media, broadband and telecoms providers.

[36] The definition of a new user was someone who obtained internet access within the last two years in any location or from home during the last year. Among these 'new' users, the research found that people were using the internet in a variety of ways – there was not a cluster around one type of behaviour. Some of these new users had lapsed and were not using the internet at all anymore. Others had given up going online themselves and were doing so via a proxy. Some were still online but making narrow progress while others were making quite significant progress. In order to capture the experiences of this last group, we refer to them in this report as developing users. The report therefore discusses in detail the experience of lapsed users, proxy users, narrow users and developing users.

Participants were also selected to represent key areas of engagement in each of the four nations. Interviews were conducted face-to-face and by telephone between December 2011 and February 2012.

Note:
Given the breadth and volume of services available across the UK, the research for this stage among stakeholders and front-line practitioners is not representative of all feedback on delivery across all services. The aim was to provide a 'flavour' of learning and experience. The findings relate to the views expressed by stakeholders and front-line practitioners represented in this research, and must therefore be considered to be illustrative of the sector.

Section 5

Research: digital participation – the objective

Digital participation is becoming increasingly important as more services are only available online, or are available offline at a higher cost or lower quality. This puts those who are not online at a disadvantage. It also creates the prospect of a widening gap, not just between those with and without access, but between those who participate fully and those who don't.

This section explores the scope and meaning of participation and its perceived emphasis and importance. It draws in particular on the views of senior stakeholders and front-line practitioners, looks at the definitions that are used, and introduces the implications for policy and delivery; detailed more fully in section 9 of this report.

5.1 What's in a word - digital inclusion, participation or capability?

An element of the stakeholder focus in this research was to explore what people understood by the term 'digital participation', particularly in relation to other terms: digital inclusion and digital capability. How stakeholders understand these terms can affect the way they approach the relevant challenges.

At best, they view 'digital participation' positively; as a richer definition that goes beyond technology and the development of skills, and indicates active engagement, motivation and effort by consumers to embrace the online world and get the most out of it.

For some stakeholders, it is not even about the word 'digital'. It is about getting consumers to *participate in society*, given that the online world is becoming an increasingly dominant part of how the majority of people interact, socialise, communicate, share, trade, engage in the democratic process, work, etc.

> *"We need to take the word 'digital' out of it. It's about how we get people to participate in society"*

> *"Participation is the right term to use. It is wider than technology. It encourages us all to consider what it means to participate in a society that is increasingly online"*

Among other stakeholders, the downside of the term 'digital participation' is that it implies a complex, academic focus on the journey. Although this is interesting, focusing on the journey risks diverting finite funding and resources away from the more tangible and practical need to get people online and help them to develop basic skills.

"Digital participation makes things complicated. It belongs to academia . . . what it's about is helping people to get online so that they can do things like save money. We're not in the business of finding the next person to design a new Google!"

There are widely-differing views among stakeholders about the term 'digital capability'. For some, the term is too narrow and ignores the fact that many who choose not to go online are, in fact, 'capable'. Others believe that developing capability is easy compared to getting people to consider going online. Still others believe that the development of offline skills, related for example to literacy, is more relevant than the development of online capability.

"The things that you do online require the same sorts of skills that people have offline. It is the [perception of] *technology that gets in the way . . . not a lack of capability"*

"The hard part is getting people interested in going online. Once you've got that, developing capability is easy"

"Lack of offline skills is the problem. If people don't know how to fill in a tax return offline, then how can we expect them to know how to fill one in online?"

This wide range of views among stakeholders proves that the challenge is complex and multi-faceted. Most agree, at least, that the enterprise requires a broader and deeper analysis than the most commonly-used term 'digital inclusion' implies. The challenge goes beyond technology.

Indeed, the evidence from people who are less digitally engaged in this research suggests that some of the language used by providers and stakeholders is off-putting.

'Digital' is a term that the majority of people take for granted. But those who are less digitally engaged are easily daunted by this and other 'technical' terms like 'IT', 'technology', 'computer' or 'laptop'. For them, these terms conjure up an image of complexity and effort – and this is often so great that it outweighs the promised benefits of the internet.

"Computer is such a terrifying word"

"The past has been about technicality. It's very off-putting. It feels to people like it's an end in itself rather than a means to an end. It's essential to change the language"

5.2 Delivering the vision

The National Plan for Digital Participation[37] was launched in March 2010. It set five objectives, based on the Panel's need-based framework:

- To get people interested in going online.
- To provide people with information and incentives to get online.
- To provide people with the opportunity to develop the skills to make it work and to know how to get help when required.
- To empower people to make the best use of the opportunities and benefits available online.
- To enable people to identify and manage the potential risks associated with being online.

There is evidence from this research to suggest that much of the focus to date has been on the first two objectives. Naturally, all stakeholders thought that enabling access to the internet was essential. Success with the remaining three, among people who are less digitally engaged, has been more variable.

The majority of front-line delivery practitioners had a keen sense of all five of these objectives. They put forward a wide range of ideas for increasing engagement, which are detailed in Section 9.

However, many front-line practitioners are being held back by a lack of resources and funding; plus a competing need to deliver front-line services to those who are easier to reach and more strongly predisposed to want to get online and develop their capability.

Overall, stakeholders feel that good work is being done, despite the limitations. Most stakeholders and front-line practitioners we spoke to believe that what works best is informal learning and a set of interest 'hooks' that help to inspire and motivate people to want to carry on learning, and to overcome the barriers to technological complexity and develop capability.

> *"Engagement leads to skills acquisition; not the other way around"*

> *"You can get people motivated by showing something online that relates to their interests"*

By the same token, it is widely accepted that formal 'classroom' training is typically very off-putting.

However, limits on funding and resources inevitably force much of the focus onto **introducing** consumers to the internet, rather than providing ongoing support over the

[37]National Plan for Digital Participation (Department for Business Innovation & Skills, March 2010)

course of their journey. The evidence from this research suggests that this focus works well among those who are more predisposed to learning, and who by definition are easier to reach and are more inclined to ask for help. But many stakeholders agree that reaching those who are non-predisposed, and who need a more sustained level of support, is considerably more challenging.

There is good evidence of a more progressive and innovative approach, adopted by some front-line coordinators and practitioners, and documented in Section 9, that overcomes some of these limitations, improves reach and widens the scope to provide a more sustained level of support among those consumers who are harder to reach. There is also good evidence, particularly in the devolved nations, of a more joined-up approach, that targets the harder-to-reach and signposts people to appropriate resources at different stages in their journey.

Stakeholders are already starting to think about adapting to the need to focus more on the journey, in order to improve the prospect of more sustainable levels of engagement and participation.

> *"We must move now into looking at the journey. Before, it* [the remit] *was de-scoped, purposefully I think, in terms of just simply getting people online. We need to do more than that. We need to change people's habits and tackle inertia. It's more complicated but we do, increasingly, have to look at the journey."*

> *"It's been the right focus in the past. There was the need to raise the profile rather than focus on particular aspects of the journey. We need now to get the focus on digital capability. Educating people about what they can and can't do online."*

> *"We need to be more innovative in how we work with partners . . . to help them to do more to engage with people online."*

> *"Access is a pre-requisite, not a measure of participation."*

> *"In the past, access was the challenge. Now it is increasing engagement."*

The evidence from people who are less digitally engaged suggests that this shift is important. Typically, those with access who are least able, or least inclined to participate, are those who are deprived of any kind of ongoing support. Any initial interest they might have in going online is easily stifled if they are left to their own devices. The barriers to participation that they encounter **along** the journey, not just at the beginning, can be insurmountable without continued help.

At best, this limits participation, with consumers failing to develop their engagement beyond a rudimentary and occasional pattern of use. At worst, they may lapse altogether and be left thinking that the internet is not for them. Some people may then exaggerate the negatives of the internet to defend their decision not to engage, and to protect themselves from the embarrassment and stigma associated with not being online.

It's also important to shift the focus and emphasis, because many people who are less digitally engaged are not predisposed to ask for help beyond their immediate friends and family. Some are embarrassed to ask. It is notable that in our sample very few people who are less digitally engaged were aware of, or had been exposed to, any kind of formal help, despite having ready access to it in their local community. Even when they were aware of it, very few had considered using it.

Overall, the evidence from senior stakeholders, front-line practitioners and consumers suggests that a significant challenge remains: to focus funding and resources on reaching and influencing people who are less digitally engaged, who either do not want to go online, or who are unwilling to ask for help; who may prefer to get someone else to do it for them, or who may be persuaded to have a go, but then lapse.

An important prerequisite for meeting this challenge is a shared and deep understanding of the barriers and drivers that, respectively, hinder and facilitate consumers' digital participation journey. In section 7, we provide a detailed assessment of these barriers and drivers, together with case studies of consumers whose journeys have been affected by them.

5.3 Measuring what works

ONS[38] reports that 83.7% of the UK adult population have **ever** used the internet. This figure includes people who may have not used the internet for months, or even years, and so informs us about access but not about the quality of participation. However, among those who have ever used the internet, there are people who:

- make only narrow use of the internet;
- rely on someone else to go online for them; or
- have lapsed in their usage altogether.

Some stakeholders held particularly strong views on this point. They believed that defining participation in terms of those who say they have 'ever' had access has, at best, only a superficial benefit.

> *"Put your hands on a keyboard and you're done; you're counted"*

> *"A fantastic job has been done with PR, but we have failed to be engaged with delivery or the development of a sustainable, long term solution"*

More specifically, the use of 'ever' in this context may imply that 'access' alone is a sufficient antidote to low digital participation, which masks the more fundamental need to develop a sustained level of engagement. Measures of access risk over-estimating the

[38]ONS Internet Access Quarterly Update 2012 Q1

number that is actually participating; in short, being able to get the internet is not the same as using the internet.

5.4 The challenge of reaching 'non-liners'

Many stakeholders share the view that the business of getting people who are **not** online to actively participate in the future will get harder. Some are asking whether what has worked in the past will work as well in the future.

> *"It's going to get harder"*
>
> *"If you take just the number of those with a disability who are not online: we haven't scratched the surface"*
>
> *"We need to get much cleverer in how we approach and target individuals. We've got to take the provision to them"*

The number of those who have **never** used the internet has reduced from 10.2 million[39] in 2010 to 8.1 million today.[40] In percentage terms this represents a reduction from around 21% of the UK adult population to 16.1%. Comparatively, the extent to which particular sub-groups remain offline is significantly higher, i.e.:

- 73% of those aged over 74
- 39% of those aged 65-74
- 35% of those who are DDA disabled[41]

These sub-group percentages suggest the presence of a range of harder to reach people who are less likely to be predisposed to getting online and to participating in a meaningful way.

[39]The Economic Case for Digital Inclusion (2009) takes as its baseline an estimated 10.2 million adults who have never been online (ONS Q1 2009).This represents approximately 21% of the UK adult population in 2009.
[40]ONS Internet Access Quarterly Update 2012 Q1
[41]DDA disabled refers to people who have a disability as defined by the Disability Discrimination Act

Section 6

Research: digital participation – the consumer journey

This section reflects what people who are less digitally engaged regard as key factors that might influence their online progress. It describes the main barriers to greater participation, with a particular focus on two barriers that are regarded by many stakeholders to be most critical: (i) Habit and satisfaction with what's available in the offline world; and (ii) the technological complexity associated with the online world. It also addresses the drivers to participation that were identified by the study.

6.1 The barriers to participation

In our sample, many people who are less digitally engaged have great difficulty in seeing the online world as a familiar and comfortable place. It is not just that it is strange and unknown. It is that the offline world is comparatively so much more comfortable, safe, familiar and accessible. Many people who are less digitally engaged continue to see (and experience) the offline world as considerably more user-friendly. Offline remains a much bigger part of their lives. The dominance of the offline world makes the online world feel separate and unrelated. For many participants, going online was felt to be an arduous journey – often requiring considerable determination and assistance to overcome the barriers. Many are not motivated to make the journey. Those who fail to make progress can feel resentment about being pushed into doing so.

The research identifies a range of barriers that create resistance and inhibit people's ability or willingness to participate.

The research points to both **habit and satisfaction with the status quo,** and the **fear of technology and its complexity,** as the two main barriers to participation. Both these factors are often accompanied by low motivation to find out about what is online.

6.2 The status quo: the 'gravitational' hold of the offline world

Habitual behaviour roots people in the offline world. So strong is the habit to pick up the phone, write a letter, visit a local bank branch, etc. that most people who are less digitally engaged do not even consider the benefits of online use in terms of speed, convenience, etc. What they and others around them 'normally do' seems to be so much easier and quicker, safer, and more certain.

The evidence is also of a strong adherence and loyalty to traditional methods, services and channels in the offline world.

"It's easier and quicker to do things the normal way. I like to see and touch things, especially before I buy them. The internet's good for information . . . but that's about all"
(Narrow user, female, 62)

"You know, by the time you've got the computer turned on and up and running, I could have done it all on the phone in half the time"
(Narrow user, female, 22)

There is often greater fear of offline exclusion than of digital exclusion. Some people who are less digitally engaged would consider not undertaking tasks in the offline world as socially excluding.

"I like going down to the post office. It gets me out and about and meeting people. I don't want to stay indoors and stare at a computer screen"
(Lapsed user, female, 77)

Whether out of habit or loyalty, choice is determined more by availability than anything else. Availability in the offline world is more manifest and tangible and serves a number of social functions beyond speed and convenience.

At the same time, consumers feel that offline service providers (both private and public) are working to improve offline channel quality.

"It used to take 20 minutes on the phone to get through to the GP surgery. People complained and now they've put a brand new phone system in. It's brilliant"
(Proxy user, male, 66)

"I do my banking on the telephone. It's great. You can get to talk to someone and explain things"
(Lapsed user, female, 66)

6.3 Fear of technology and its complexity

The research found another key barrier to participation, among people who are less digitally engaged; technology and its perceived complexity. This fear is often compounded by people's actual experience of the technology.

While habitual behaviour roots people in the offline world, the complexity of technology pushes them away from the online world. Existing technology and the language that is usually used to describe it only exacerbates the divide between the offline and the online world.

Among people who are less digitally engaged, current technology (particularly PC-based) is seen to be difficult to use, 'clunky' to set up and too complex, because it has too many features.

> *"It is so easy to get lost. You spend ages on it and end up with nothing by pressing one wrong button"*
> (Lapsed user, male, 54)

> *"I've only just learned which button to press to put a capital letter at the beginning of a sentence. I found that out a couple of weeks ago"*
> (New user, female, 69)

Those participants who did have access tended to have older, outdated desktop PCs or laptops, that were more difficult to use, and many complained that they were slow and unreliable. This might compound the perception of complexity: when things didn't happen immediately or didn't work at all, the tendency was to blame themselves rather than the technology.

Access was more often than not a planned activity, with the machine being left off and kept in a bedroom or study area. The tendency was to 'go to the computer' when there was a definite need or reason to do so, rather than it being close to hand and a natural 'first port of call'. Observationally, the distinct sense was that technology was often an appendage; something at the periphery rather than the centre of people's lives.

Many people who are less digitally engaged do not relate to, or identify with, the images and language of technology. Many older respondents in the sample associate these with a younger generation. For some younger people, it is associated with the well-educated.

> *"It's for a younger generation. They've grown up with it. It's too late for me"*
> (Male, Proxy user, 67)

> *"It's boring. Computers remind me of school and study and people who go to libraries"*
> (Female, Narrow user, 22)

This can motivate some people to learn, in order to be able to relate better to their children and grandchildren, as well as to improve their own skills. But for many, the divide is too great: the others, who are online, are too different, too unlike them. This makes it difficult for them to believe that they will find the experience as rewarding and beneficial to them as it appears to be to others. This is often used to defend their decision not to participate.

> *"I think we're brainwashed into it. My friend is obsessed with it. I just don't want to be like that. It's not healthy"*
> (Female, consumer, 76)

This view can sometimes be seen to be reinforced by media coverage. Negative news that associates technology and the internet with fraudsters, paedophiles, scammers, etc. appears to impact more strongly than media messages designed to focus on the benefits of the internet. Again, this is used to defend a decision not to participate, or to limit it to a significant degree.

Negative media coverage makes technology less accessible. It tends to address the 'educated' majority and heavily pre-supposes prior knowledge. This makes much media coverage appear complicated and daunting. Fear about security is very evident among people who are less digitally engaged. Worries about pressing the 'wrong' button or typing in any form of personal information inhibited engagement very significantly.

> *"I'm never going to put my personal details in. Once you've' done that, it's all out there and you can never get it back"*
> (Male, Lapsed user, 54)

> *"It's disgusting what's going on, with these paedophiles. I tell my grandchildren that it's very dangerous"*
> (Male, Proxy user, 76)

Overall, it remains a major challenge to bridge the gap so that the digital world looks and feels as natural, 'normal' and intuitive as the offline world. This can only come through practice and familiarity.

6.4 Attitudinal and circumstantial barriers to participation

The research found other barriers that can prevent people from getting the most out of being online, limit the breadth of their participation or even put them off participating altogether. These barriers vary significantly among the different types of consumer, depending on their disposition and circumstances:

- **Low awareness of community-based sources of help: M**any in the sample are not aware of what is available, and few are predisposed to the idea of finding out what is available.

- **Misconception about community-based sources of help:** Many suppose that outside help is not suitable for them. The tendency is to think of formal, classroom-based learning that is geared to the needs of more advanced users. This can often be accompanied by fears of being 'tested' or that their lack of experience and competence will be revealed in front of others 'better' than themselves.

- **Lack of ongoing support:** Many participants say that they need ongoing help to sort out problems and help them use the internet. Lack of ongoing support will limit the breadth of their participation and, for some, their willingness to stay online. Notably, some do not stay online or participate fully, despite having ready access to support from friends and family.

- **Lack of priority:** Some participants claim that online access is affordable, but they regard the cost as unduly high in relation to the perceived benefit of going online. Having tried it, they do not see sufficient benefit to staying online and/or perceive the cost of doing so to be too much of a risk, i.e. it provides no certainty of reward or financial return.

- **Lack of time:** Some participants lack time in absolute terms or in relation to other priorities. Either way, this reduces the opportunity for them to develop their online skills and experience. Some participants are held back because of the lack of time and availability of others who might otherwise be in a position to provide help and support.

  Lack of confidence: Many in the sample did not have the skills to use a computer and didn't feel that they were capable of learning these skills. For some, this is linked to low interest and low motivation. For others, it is linked to low self-esteem, empowerment and assertiveness. A few were considerably lacking in confidence because of literacy issues (e.g., not being able to spell) as well as having no experience of using a keyboard.

- **Social isolation:** Some participants live alone and/or have very limited access to friends, family or neighbours who are online themselves. So there are no positive role models or positive peer pressure. This, again, limits opportunities to develop their online use and increases the chances that they will stop using it altogether.

- **Poor family dynamics:** Some have ready access to others with online experience, e.g. a son, daughter or spouse, but these people are not willing to help or are not good at helping. Poor family relationships (particularly inter-generational ones) rule out - or at least make it very difficult - for participants to ask for help. Doing so can sometimes be seen to compound the problem, i.e. a refusal to help lowers

confidence and reinforces feelings of inadequacy, which in turn leads to low participation or lapsing altogether.

- **Presence of a dominant proxy:** Some participants in the sample find it easier to rely on someone else to go online for them. More often, others, (typically a spouse or other family member living at home) think it best to go online for them.

- **Low affordability:** Some in the sample have particularly low incomes and claim that the absolute cost of equipment, as well as the cost of a broadband connection, is prohibitive. This means that they are reliant on others to provide access for them or to go online on their behalf.

These individual and circumstantial barriers are discussed in more detail in Section 7 in relation to the consumer types identified.

6.5 Potential drivers for participation

The research identified a number of drivers that influence people to get more out of being online, and broaden and deepen their engagement. As with the barriers, these drivers vary significantly among different types of consumer, depending on their disposition and circumstances:

- **Tenacity / determination:** A minority in the sample were driven by virtue of having a more determined, confident personality, with a strong predisposition to reach out and take advantage of the support and resources that were available. In return, these helpers tended to respond well, rewarded by seeing the user benefiting from their help.

- **Ready access to informal, ongoing, one-to-one support: This** driver often represented the tipping point between lapsing and developing online participation. Help at the start of the journey was critical; getting started with using the computer and setting up a broadband connection. Ongoing help was equally important to sustain effort and interest to overcome some of the more significant barriers to use. People valued one-to-one support, particularly from a friend or relative, and this was often very effective in pushing them forward to a point where they could start to develop their online engagement by themselves.

- **Benefits of being online**: Interest and motivation to go online is stimulated by a range of financial, social and communication benefits. Awareness of this tends to come initially from friends or family, and/or a more general impression gained from the media.

- **Relevance to interests**: A key driver is a hobby or interest in the offline world that can, in some way, be replicated and enhanced online. Many had sustained their online participation through developing an interest online, particularly if it

enhanced their offline interest.

- **Fear of being left behind**: A key driver for many is the fear of being excluded: financially, socially or emotionally. For some, it was important to have a sense of belonging; being able to relate to the online views and experiences of others. Others felt that being online brought them closer to family members, particularly those from a different generation. Others felt driven to participate to avoid ridicule and stigma, worrying that not being online was associated with out-datedness and even incompetence.

- **Peer pressure**: The recommendations of others were for some a relatively strong source of motivation to go online. Others felt this as pressure to go online, with friends and particularly family members 'nagging' them to do it.

Section 7

Research: individual journeys - consumer types in detail

This section looks in detail at the digital participation journey for different types of consumer. It examines the barriers and drivers that come into play at different stages in the journey and the need for different kinds of support at each stage.

While some people who are less digitally engaged are relatively well placed to overcome the barriers to participation, many are not. Typically, those who are well placed to expand their online usage are more strongly predisposed to learning and /or are helped along the journey by a more advantageous range of personal, social and economic factors.

7.1 Low digital engagement groups

As noted in Section 4, four types of users were recruited for this stage of the research: lapsed users, proxy users, narrow users and new users. (See full sample breakdown in Annex B)

The definition of a new user was someone who had obtained internet access within the last two years, in any location, or from home in the past year. Among these 'new' users, the research found that people were using the internet in a variety of ways – there were no clusters of one type of behaviour. Some of them had lapsed and were not using the internet at all anymore. Others had given up going online themselves and were doing so via a proxy. Some were still online, but making narrow progress, while others were making quite significant progress. In order to capture the experiences of this last group, we refer to them in this report as developing users. The report therefore discusses in detail the experience of lapsed users, proxy users, narrow users and developing users.

These types of users vary in the extent to which they participate and the extent to which different kinds of barriers affect their progress.

Many lapsed and proxy users have a very low inclination to go online. In addition, many narrow users are disinclined to extend their repertoire. Typically, these consumer types are harder to reach and, even when reached, appear to be harder to convince.

Developing users, and some narrow users, are quite different in terms of attitude, as well as the quality of access they have to support them and the resources that have helped them to overcome the barriers. Typically, they are easier to reach informally (by other family members, friends, etc.) and are more predisposed to asking for help from others, including formal sources of help.

Each of these consumer types is examined in detail in the following sub-sections.

7.2 Lapsed users

These people have used the internet in some way but have since lapsed. Many were not introduced well, and have been put off by the online experiences they have had. Some have lapsed because of the influence of a dominant proxy. Many now reject the idea altogether and are heavily non-predisposed to the idea of going back online.

What stops lapsed users from participating?

The loss of a key source of ongoing help/support is a major factor. These lapsed consumers were introduced in some way - most typically by a family member or housemate bringing a computer into the home. Some were motivated themselves initially to have a go and may also have been encouraged by others to do so. But often they were left to their own devices. The people around them either did not have the time to help, did not want to help, were not very good at helping, or felt it best to go online for them. In some cases, an important source of help or motivation was lost as a result of a family member moving away or in some cases dying, leaving them with little or no access to help from others.

Left to their own devices, most people claimed that the complexity defeated them. This significantly reduced their ability to get any benefit from online use. They quickly reverted to offline alternatives, due to their comparative ease and convenience. Rather than blame the technology, the tendency was to blame themselves, either by regarding themselves as incapable or 'lazy' in not wanting to devote the time and effort to learning. Few had the confidence or determination to persist. Family members either had no experience themselves or were not willing to help. This can, at worst, undermine confidence, by suggesting that people don't have the skills to learn; that it is *'not worth their time'* to help them.

The typical result is that many of these lapsed consumers have developed an aversion to going online. Some now actively reject the idea of ever going online and seek to defend their decision, or cover the embarrassment and stigma that they believe others associate with someone who is not online, by denigrating the internet as unsafe and exaggerating the positives of what they can do and get in the offline world.

"I couldn't see the benefit of it. It's for kids who want to spend all day chatting to each other on it"
(Lapsed user, male, 55)

"It's easy enough to do things in the normal way. I've got better deals by haggling on the phone"
(Lapsed user, female, 65)

"It's dangerous. I warn my kids about it. You don't know who you're giving your private details to"
(Lapsed user, male, 53)

Overall, reaching out to lapsed users is difficult. Having experienced the internet once and had a poor experience, persuading them to go online again is particularly difficult. For some, the interest and motivation to go online remained, but they had no access to help. Others, who might have helped, are typically a source of negative reinforcement.

> *"My son has no interest in helping me"*
> (Lapsed user, male, 54)

Importantly, the evidence is that many of these lapsed users will not respond to community-based sources of help and support. This is partly to do with misconception and partly to do with an aversion to learning in a social environment.

> *"I don't want to go and sit in a classroom. It's too much like school"*
> (Proxy user, female, 69)

> *"I wouldn't go to a library. It's a place where you've got to be quiet. I wouldn't be able to take my kids with me"*
> (Narrow user, female, 44)

Many have misconceptions about the formality of outside help, believing that learning is classroom-based and 'academic'. Learning in a social environment is particularly off-putting among those with literacy issues. Most claim that no matter how 'friendly' and incidental to learning the environment, there is the threat that their shortcomings will be revealed and 'tested' in front of others.

> *"The problem is that I can't spell. It took me ages to type an email. I don't want people to know. It's embarrassing"*
> (Lapsed user male, 54)

Even when it was explained that formal sources were designed for absolute beginners, the tendency was to feel that social learning was not for them. Many were already put off but, if they were to consider outside help, they would want one-to-one tuition, which they thought would not be available.

Affordability was a strong consideration for only a few in the sample. Instead, the barrier tended to relate more to low priority.

What drives lapsed users to participate?

Initial interest was most often stimulated by the promise of significant social, communication or economic benefits. This might come from friends or family, or a more general impression gained from the media.

Many also felt motivated to have a go by an increasing sense of exclusion. They had a general sense that they were missing out, from being with others who talked a language they did not understand.

Some were motivated by a belief that joining in would bring them closer to others - helping them, for example, to relate better to family and friends. A few even felt some obligation to participate for fear of ridicule.

These drivers were, in the main, relatively weak. Most lapsed users were reactive and reluctant rather than proactive and enthused by the idea of going online.

Figure 7.1: Lapsed users – summary

For lapsed users, the challenges are very significant, with the barriers to participation significantly outweighing any drivers.

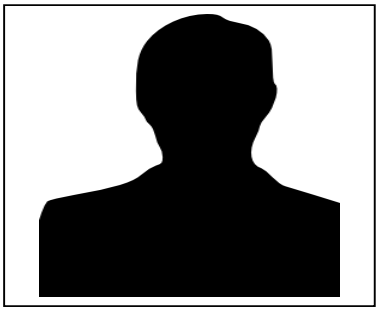
- **Among lapsed users, the main barriers were:**
  - Attractions of offline – it was felt to be easier, faster and often more rewarding to interact offline than transact online
  - Fear of technology and its complexity
  - Lack of confidence, with low skill levels and an inclination to believe that they are not capable
  - Social isolation and poor family dynamics
  - Lack of ongoing support
  - Low awareness of outside help
  - Misconceptions about outside help
  - Lack of priority and time
  - Presence of a dominant proxy
  - Low affordability

- **Potential drivers:**
  - Initial promise of benefits
  - Fear of being left behind
  - Relevance to interests.
- **Key issues / opportunities:**
  - Reaching out to lapsed users is difficult
  - Many will not respond to community-based sources of help and support
  - The loss of a key source of ongoing help/support is a major factor

- A key need is for better signposting to formal, community-based sources of help and to address misconceptions about these
- More fundamentally, the need is to create more opportunities for incidental exposure to outside help.

Figure 7.2: Case study: lapsed user[42]

STEVE
LAPSED



Profile

- 52 year old lorry driver
- Ex council house
- Low income
- Poor literacy
- Married, with two children and a foster daughter
- One child still at home
- Difficult family dynamics
- Enjoys golf and spending his free time in the pub

Motivation

Steve can't spell very well and so avoids texting. He prefers to talk rather than write.

He got on well with his foster daughter who brought an old computer into the home and set it up for him. She showed him the basics and sent an email to one of his old school friends. His friend replied but Steve preferred to call him because it was too time-consuming to type out a properly spelled reply. He felt embarrassed by it.

Outcome

Steve's got his pub, his golf and his TV and doesn't feel like he is missing out.

Background

Steve works longer hours when he can to supplement his income. He is worried about being laid off. His wife works as a teaching assistant and does not use a computer herself.

On the weekends, he plays golf and watches sport on his 42" plasma TV via Freeview (Sky was too expensive). The pub is a bit of a haven where he can escape from the family and be with his mates (none of whom are online).

The family dynamics are not good. Steve argues a lot with his son and his daughter has no time for him. She comes round with her friends and they spend most of their time on their smart phones rather than talking to each other. He thinks it's odd and is now of the view that the Internet is for young people who spend hours on it and get themselves into trouble by revealing too much about themselves. He worries about his granddaughter who could be exposed to paedophiles and all sorts of other dangers. As he says, "*It's not safe. You read things about it in the papers*

Support

Unfortunately, Steve's foster daughter emigrated. His son is not interested in helping him. He has asked his other daughter to show him how to go to a comparison site to find cheaper car insurance. She complained that it would take too long to teach him. She got him on to the site but did not show him how to get to it and so he hasn't been able to find it himself since. She said that she showed him once and, if he couldn't get it, then it was probably not for him.

Technology

Steve lacks confidence and sees computers as something you need a decent education for. He doesn't really feel that there is much reason to spend time trying to learn, and fears that he would be too far behind if he were to go on a course; not that he would anyway. He worries that "*People might think I'm stupid*". He has seen computers in his local library but thinks that they are for people who know how to use them.

[42] Here, and throughout the report, these portraits of users are based on participants in the research, to illustrate the experience of particular users. Personal details have been changed to protect their identity.

7.3 Proxy users

These people are not able or willing to access the internet themselves. Instead, they are reliant on someone else to go online for them – a proxy. Some may actively choose not to go online and claim to prefer to be dependent. Others express some interest in going online and are reluctant to have to do so via a proxy.

What stops proxy users from participating?

Some of the proxy users we spoke to claim that they have no interest in going online themselves and prefer to be dependent on someone else to go online for them. Others express some interest in going online and are reluctant to have to do so via a proxy.

Factors that determine proxy use are complex, but normally centre on the dynamics of family and friends who, typically, have a more prohibiting than facilitating influence.

The characteristics of the proxy varied significantly in terms of availability, expertise and their ability/willingness to teach rather than simply maintain the dependency. Three main kinds of Proxy emerge:

- a spouse or partner who has power/control, due to a significantly more developed set of online skills;
- a readily accessible family member who has neither the time nor the motivation to help the proxy user to do it themselves; and
- someone accessible (living elsewhere) who feels that doing it for them is the best way to help.

"My children hog the machine. It's really theirs now, rather than mine"
(Proxy user, male, 49)

"My wife's on it all the time. She'll lose her legs eventually!"
(Proxy user, male, 56)

"To be honest, if my daughters weren't here and able to do things for me, I'd probably already have got a computer, and learnt how to use it"

"It's unstoppable. I'd like to learn, but I don't really have the interest or get the chance"
(Proxy user, male, 60)

Whatever the type of proxy influence, proxy users typically have difficulty developing their self-confidence and empowerment.

The power of the proxy limits the opportunity for the proxy user to learn, as they don't feel that they have ownership. The tendency is not to personally identify with using the internet

Due to this, some are potentially vulnerable, i.e. they are likely to become excluded if the proxy stops going online for them (as a result of death, divorce, moving away, etc.).

What drives proxy users to participate?

Most proxy users in the sample claimed that they were capable of going online themselves. But while someone else is readily available, to go online for them, they tend to find it easier to 'let go'.

In addition, the people we spoke to tended to have limited belief about the benefits of the internet. So their requests tended to be confined to the most obvious and tangible benefits that they couldn't achieve offline, such as shopping around for car insurance or for cheaper flights. Beyond this, and for the most part, they felt that the offline world provided a better and easier experience.

Some proxy users feel the 'pull' of the online world more keenly than others. Peer pressure strengthens the feeling that they are being left out or left behind. Some want to relate better to what others are doing online, rather than being thought of as an outsider and/or a burden on someone else. Success in achieving independence depends on the kind of proxy that they have access to and the quality of support they get from them.

Ultimately, despite peer pressure, and a feeling of obligation to participate, the offline world remains more accessible, 'safer' and more familiar. It is, in many cases, easier to identify with and there is no strong enough reason to do online what they already feel they can do offline.

"You feel penalised because I know if you are online you can get things cheaper. But I still like to go to the shops. It gets you out and about and meeting people"
(Proxy user, Female, 65)

"My friends keep nagging me and you do feel left out when they go on about it"
(Proxy user, female, 75)

"I don't like to ask too much. My son and daughter have their own lives to lead"
(Proxy user, male, 65)

"I know you can get cheaper car insurance online. But I prefer the phone, so I get my son to find some good quotes for me and then I ring them up"
(Proxy user, male, 56)

Consideration of these barriers to access among proxy users suggests the need for better and more immediate access to outside support, to bolster their confidence and ability to do more themselves. The evidence suggests that outside resources may be more effective in targeting the people who go online on their behalf (the proxies) instead:

- **To provide guidance on how to train and support a proxy user:**
  Most proxies in the sample claim to lack the time, the patience, and sometimes the skills to teach. Typically, they simply offer to help to set the proxy user up with a computer and provide an initial introduction in the hope that this will inspire them to learn for themselves. Providing guidance on 'short cuts' and quick ways to motivate a user to learn may be productive, as well as discouraging the belief that it is better to go online for them.

- **To provide clear and effective signposting to suitable outside help:**
  Many proxies claim to be willing to encourage the proxy user to go elsewhere for help. But as with many people who are less digitally engaged, the difficulty is in knowing where to go for the kind of outside help that is needed. Proxies also have misconceptions about the formality of community-based learning and attempts by proxies to point proxy users to outside help can be a bit 'hit and miss'.

> *"My mother was driving me insane. I just couldn't cope with it anymore so I thought that the adult education college would be the best place. I got her to go and she said it was so over her head she'd never go again. That's such a pity because I since then found out from a friend about a library course for absolute beginners who said it was wonderful. The problem is that now I can't get my mother to go!"*
> *(Proxy, female, 38)*

The key requirement among proxies and proxy users would seem to be better communication and stronger signposting to what is available by way of outside help, with a clear focus on suitability to individual needs, i.e. the kind of informal, 'learn at your own pace', interest-driven training that front-line services actually provide.

Figure 7.3: Proxy users – summary

Some proxy users claim that they have no interest in going online themselves and prefer to be dependent on someone else to go online for them. They are therefore heavily non-predisposed to participating. Others are more receptive but ultimately held back by barriers and weak drivers.

- **Main barriers:**
  - Attractions of offline
  - Fear of technology & complexity
  - Presence of dominant proxy
  - Lack of ongoing support
  - Lack of priority
  - Low awareness of outside help
  - Misconceptions about outside help

- **Potential drivers:**
  - Benefits of being online (financial, social, etc.)
  - Peer pressure / encouragement of others
  - Relevance to interests
  - Fear of being left out / left behind

- **Key issues / opportunities:**
  - Consideration of the barriers to access suggests the need for better and more immediate access to outside support
  - Outside resources may be more effective in targeting p**roxies** rather than proxy users
  - Proxies respond well to clear and effective signposting to outside help, as a means to 'offload' the responsibility of going online for proxy users
  - Some proxies also respond well to guidance on how to train and support a proxy user. None in the sample was aware of the National Digital Champion scheme.

Figure 7.4: Case study: Proxy User

TERRY
PROXY USER

Profile

- 66 year old retired machinist
- Married with 3 children and 3 grandchildren
- Lives in a modest bungalow in Leicester
- Close family bonds
- Left school at 15
- Health problems with limited mobility
- Few interests: (TV, crosswords and reading) a *"simple life"*
- Wife has well-developed online experience

Background

Terry is a retired machine operator. He is 66 and has suffered increasingly over the years from chronic arthritis which limits his mobility. He lives with his wife in a modest bungalow in a suburb of Leicester.

Terry's wife still works as a machine operator and has had past experience using a computer. A neighbour has been very helpful and set them up with a computer in the home. His wife is considerably more socially connected than Terry and spends an hour or two each day on Facebook, chatting to her friends. Terry prefers, as he says, a "*simple life*" and spends most of his time at home, watching TV, reading and doing the crossword.

Support

His wife has sat with him and showed him the basics but, like his grandson, she moves too fast. His neighbour has also been over to try to help him. But, it all seems very difficult. He's frightened to press too many buttons because he fears that he will *"bugger it up"* for his wife. None of it is straightforward. He presses buttons and it works and then presses the same buttons again and it doesn't work. It's all so time-consuming and a lot of effort for pretty much no reward.

He feels vulnerable too, in not knowing what is safe to do. He has read stories in the newspapers about scams and viruses. It all feels very uncertain and he is very against the idea of buying anything online. *"I don't feel in control"* as he puts it.

Outcome

It seems that none of his family has confidence in him. His wife finds it easier to do it for him rather than show him how to do it. She thinks it is best. He confesses that he *"no longer makes a concerted effort, and now it's all done for me"*.

Technology

Terry has no past experience with computers and finds technology in general to be "*mind-boggling*". Nonetheless, he felt that he ought to have a go.

Terry has been on a course. A leaflet came through the door from Age Concern, offering a free course. He went to it and got the hang of the basics. He even succeeded in filling out his electoral roll form online which he is clearly very proud of. He felt more confident doing this because, as he said, he could trust a government website. All well and good, but Terry's wife has taken over.

Motivation

Technology is "*unstoppable*" and his worry is that he can't join in with the rest of the family when they talk about it. His grandson laughs at him when he tries and ridicules him for the basic mobile phone that he uses. He doesn't feel that others think that he is capable.

7.4 Narrow users

These people have succeeded in overcoming some of the initial barriers to getting online as a result of support in the early stages of their journey. However, their participation remains very limited, either from choice, or because of their lack of capability.

What narrow users appear to have in common are:

- Sufficient confidence and determination to 'have a go', but low interest in (and some fear of) technology.
- Access to help from family, a friend or a neighbour, with setting up a broadband connection.
- Some initial help with setting up the computer itself, e.g. by putting relevant icons on the desktop.
- Limited access to ongoing help and support that would help them develop their interest and ability.
- Lack of interest or willingness to ask for more ongoing help.
- Low awareness and some misconception about outside sources of help that would help to develop their capability.

What stops narrow users from participating more?

In the research, we found a range of people who have narrow use of the internet. Some narrow users claim to be 'stuck' and do not have the confidence or ability to develop further. Others actively choose not develop any further. Some are prone to lapsing, with a tendency to re-engage only when the need to do so is most obvious and tangible. For some, the perceived benefit or reward for developing further does not merit the effort required to learn. As such, online remains a smaller and more peripheral part of their lives. The offline world competes better for their time and attention.

Left to their own devices, the result can be that:

- learning is not embedded;
- learning how to do one task does not inform them about other tasks; and
- not knowing the extent of what they can do online remains a particularly strong barrier to development.

In addition, the 'pull' of the offline world reduces their motivation to ask for further help or to take it upon themselves to learn something new.

Among narrow users, technological complexity is a particularly strong barrier. Their low interest in technology, and its effect in reducing interest and motivation even further, lead them to complain that complexity makes online use unduly time-consuming.

Technological challenges:

The main issues relate to:

- **Getting lost:**(e.g. saving and closing a file and then not being able to find it, clicking on the wrong window and obscuring the one that they were on, accidentally deleting a password in a dialog box and not being able to open the application again, etc.).

- **Language and terms that presume prior knowledge:** (i.e. commands, symbols, terms that can only be known and understood if shown or explained.

- **Over-featuring:** (i.e. features designed for accomplished users, not novices, with a limited sense of what is and is not important / necessary to know).

- **Complex routines for rescue and recovery:** (i.e. confusion about what to do if something goes wrong).

In all, current technology was felt to work for people who '*know what they know*' and required interest and enthusiasm to overcome the barriers to complexity.

"It's full of red herrings. It's so easy to get lost"
(Narrow user, female, 62)

"I get the hang of something and then, the next day, it doesn't work. I'm not sure I really know what I'm doing"
(Narrow user, female, 73)

"Sometimes, things disappear on me. I press print and nothing happens. So I'll press it again and then I get 2,000 copies"
(Narrow user, female, 57)

"It's got lots of those 'not responding' boxes on it, and I'm sure they didn't used to be there. It's me that's done that, but I don't know how to get rid of them"
(Narrow user, female, 72)

"I can go to the rugby page, but that's about it. It's a button I can press on the main screen"
(Narrow user, male, 69)

What could drive narrow users to participate more?

Narrow users would be more likely to develop (and maintain) stronger levels of interest and motivation if they could experience benefits more quickly. As things stand, the technology gets in the way and too much time is spent trying to overcome complexity in order to reach the online world. This, by contrast, makes the offline world seem even easier, and more convenient and accessible.

As with most other people who are less digitally engaged in the sample, narrow users are disinclined to seek outside help. Lack of interest and motivation compounds the problem. They fear that formal training will require them to have technical understanding, and the thought of having to learn this is off-putting.

So what may work better is clearer communication of what outside help can offer, in particular, to overcome the perception that technology is a barrier rather than an enabler. For many narrow users, the device they use gets in the way.

Figure 7.5: Narrow users – summary

Some narrow users claim to have the interest, determination and support to participate more fully in the future.

- **Main barriers:**
  - Attractions of offline
  - Fear of technology and complexity
  - Lack of ongoing support
  - Lack of time
  - Lack of priority
  - Low awareness of community-based sources of help
  - Misconception with regard to community-based sources of help
  - Lack of confidence.

- **Potential drivers:**
  - Peer pressure / encouragement of others
  - Benefits of being online
  - Relevance to interests
  - Fear of being left behind
  - Tenacity, determination
  - Ready access to support.

- **Key issues / opportunities:**
  - Technological complexity is a particularly strong barrier
  - Many complain that complexity makes online use time-consuming
  - Many narrow users need guidance that facilitates speed and ease of access, so that technology can be seen as an enabler
  - A need to address the misconceptions about outside help

Figure 7.6: Case study: Narrow User

SANDRA

NARROW

Profile

- 62 years old
- Retired, with past employment as a cleaner
- Re-married 9 years ago to a Jehovah's Witness and became one herself
- 5 children and 8 grandchildren
- Very active in the community, with limited free time
- Her husband is a delivery driver
- They live in a small semi in a modest suburban area of Birmingham

Background

Sandra finds technology confusing. She hasn't grown up with it, and still prefers to write a letter or make a phone call. She thinks that Twitter and Facebook are for a younger generation, who can't seem to go for a day without it. Sandra has difficulty with most technology. She can't even work the TV properly. She feels she could do, if she put her mind to it, but she is not into it.

It is the same for her computer. She knows the basics but feels that the effort to learn from it is not worth the benefit she would get from it. What she does like is the access that online use gives her to information. That helps her to prepare for her Witness meetings. She also likes Groupon which she does with her friends. Beyond that, technology does feel like it has little meaning or purpose.

Technology

Sandra's husband knows a bit more about technology and the internet and has got into digital photography recently, but even he feels the same. He doesn't feel that he has the time to do it properly. As he puts it, *"it's a series of red herrings. You can spend a lot of time getting nowhere"*.

There's little doubt that Sandra could do it, but she chooses not to. It all seems to be a more awkward way of doing things that are easier to do in the normal way. She could order her groceries online, but she wants to go to the supermarket instead. She likes to see what she is buying. She could get cheaper car insurance, but it takes her 'hours' to look it up and so it's quicker to phone around for a few quotes. She doesn't want to speak to a machine, it's isolating.

In all, it really doesn't feel like a good use of her time. Right now, at least, she doesn't feel left out.

Support

She knows that there are courses out there, and that if she did learn, it might all be different. But, it reminds her of school. It would be dull and boring and too theoretical. The library? Maybe, but it's a place where you need to be quiet. It's not a place to be taught how to use a computer.

Outcome

Groupon got her into it in the first place. Her friends nagged her to do it and so she had a go. Her husband helped and she got to grips with it quickly enough. Now she is a Groupon guru, but says she has no idea about doing anything else other than Google.

Motivation

She knows it's important. You have to think about it because it's going to become more difficult to avoid it in the future. But, her computer feels slow and laborious. It seems to take her an age and then, she makes one mistake, loses her place, and then feels like her time has been wasted.

7.5 Developing users

These people have overcome many of the barriers to participation.

Many now feel enabled and empowered to continue to develop their capability and to participate fully. Often, they represent strong role models and can influence others around them to go online.

What drives developing users to participate?

Developing users are set apart in this research from all others by virtue of a more determined, confident personality and/or a set of social and economic factors that work to their advantage. For many, the two go hand in hand, i.e. greater confidence means a stronger predisposition to 'reach out' and take advantage of the support and resources that are available. In turn, helpers respond well because they are rewarded by the positive reinforcement they receive when the user benefits from their help.

Most developing users have the following factors in common:

- Confidence and determination, to persist and overcome the barrier of complexity
- Outward-looking, sociable; some with quite strongly-developed hobbies and interests
- Access to a **sustained** source of help and support.

Other factors which may also contribute significantly . . .

- A desire to relate to someone else who is online (i.e. family, friends or colleagues)
- Dedicated access to their own computer in the home
- A well-developed conviction (and experience) of the online world as useful, beneficial, fast, convenient, cheaper, etc.

What seems to be most significant as a factor is a positive, disciplined attitude of mind that enables them to rise to a challenge; reaching out to find and ask for help; and learning what they are taught. This also makes it rewarding for others to stay the course and be there to help them.

"I won't be beaten!"
(Developing user, female, 66)

"I sit and press the buttons and keep pressing them until it works"
(Developing user, female, 69)

"I'll sit with my grandson and write it down as he shows me. Then I practice it until I know it off by heart"
(Developing user, female, 73)

"When I started, I was afraid to even dust the thing. I was lucky because my son is so patient, but you do have to put your mind to it"
(Developing user, female, 73)

The majority of these developing users did not seek outside help; they got it more immediately and readily from family members, friends or a neighbour.

Most were not averse to the idea of getting help from some kind of community-based resource but, like others, many had misconceptions about its suitability. Some felt that it was too advanced; others did not like the idea of having to travel to a centre and sit in a classroom with other people. It was better, many felt, to get one-to-one attention from someone they already related well to.

A small number in the sample had benefited from outside, community-based sources of help. For some, the effect of social learning was rewarding and affirming, i.e. it bolstered confidence in finding that they are more developed in their progress than others. Others were less positive, finding that courses were either too basic or too advanced.

"A leaflet came through the door from Age Concern about a 'Silver Surfer' computer course. I thought, Great, I'll go for that! I gave up after the first one. It was too basic and the teacher had to spend most of the time with people who didn't have a clue. It was a waste of time"
Developing user, female, 73)

"I went on a course and it was actually better than I expected. I got on quite well compared to the others"
(Developing user, male, 65)

Finally, many felt a strong sense of pride and achievement and had gained significant reward from developing their online use. This was not solely financial. Rational and emotional benefits and rewards were evident in terms of better, closer relationships with family (particularly inter-generational relationships); a feeling of modernity, youthfulness, energy and vitality; and a feeling of being better informed, more empowered and in control. This sense of pride looks to be a very valuable quality to exploit in terms of inspiration, advocacy and referral to others.

Figure 7.7: Developing users- summary

A strong, positive predisposition to want to go online and develop their capability, together with a set of circumstances that work to their advantage.

- **Main barriers to further development:**
  - Low awareness of community-based sources of help
  - Misconception with regard to community-based sources of help
  - Attractions of offline
  - Fear of technological complexity.

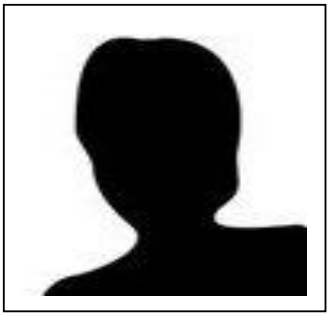
- **Key drivers:**
  - Tenacity, determination
  - Ready access to informal, ongoing, one-to-one support
  - Benefits of being online
  - Relevance to interests
  - Fear of being left behind
  - Peer pressure/encouragement of others.

- **Key issues / opportunities:**
  - What works well is a combination of sustained, ongoing support, a predisposition to want to learn and a conviction of the importance of being online
  - Many respond well to the offer of outside help but share similar misconceptions with others about its suitability
  - Developing users have the potential to be promoted as strong, positive role models who can influence others
  - Those who have helped developing users also offer the potential to be reached and encouraged to become digital champions for others.

Figure 7.8: Case study: Developing User

GILLIAN

DEVELOPING



Profile

- 73 years old
- Ex publican (tenant)
- Married 2 daughters and 4 grandchildren
- Husband was a factory worker and is now in very poor health
- Recently moved into sheltered housing and now feels more isolated
- Regular contact with daughter and grandson
- Poor educational background

Technology

Online is important to Gillian. The sheltered housing she now lives in is isolating; occupied mainly by young single mothers and elderly men who she has no wish to relate to. Also, her husband is ailing and there is the probability that he will predecease her.

Gillian is on Facebook and is friends with her grandson. What she writes on his wall tickles his mates pink! They think she's cool.

Motivation

Online usage is a way to connect with the world, keep in touch and, most importantly, connect with her family who delight in the fact that she is now part of their own online world.

Background

Gillian is a young, highly inquisitive 73 year old. She feels it's important to keep in touch with young people. She has a fantastic relationship with her grandson who, at the age of 22, genuinely enjoys her company.

Her experience as a landlady has also taught her how to be assertive. She comes across as a confident, energetic and delightfully engaging person with an honesty about what she is and isn't capable of.

Gillian thinks that technology is fantastic. She sees her grandchildren do things that she never dreamed of when she was a child. Back then, she was in a very poor home environment, with little encouragement, and got a relatively poor education.

She met her husband in a factory and in later years, they got a tenancy to run a pub in a fairly rough area of Birmingham.

Recently, due to her husband's ill health, they have moved into sheltered housing. Now in retirement, in a different area of Birmingham, she feels socially isolated but maintains very good ties with her children and grandchildren.

Support

A few months ago, she got a leaflet through the door asking her to join a "*Computer Course*", held every Wednesday at 11am. She thought *"Great!"* as there were still many things she didn't understand. She went to the first one and was disappointed. It was too basic for her. The tutor didn't pay any attention to her and couldn't really cope with such a wide range of different needs. Some people, like her, were quicker to pick things up; others were *"hopelessly slow"*. She gave up with it, but did decide to go online to do the Go On Basics course.

Outcome

She has since learned to book appointments online with the local GP surgery and has discovered how much quicker and easier it is to do it that way. Before, over the telephone, it could take her 20 minutes sometimes, just to get through. Online is a good thing, she thinks.

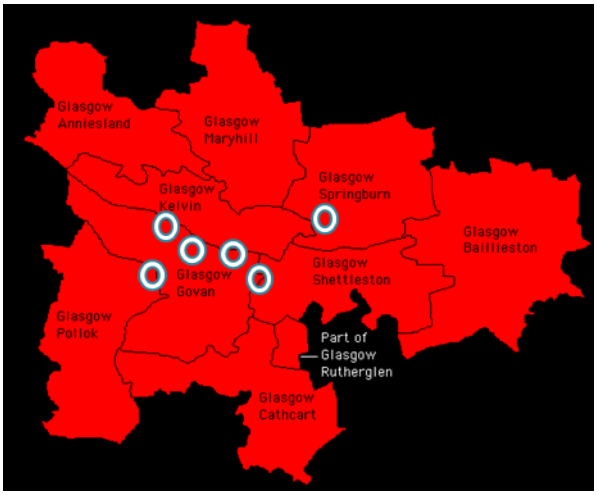
Section 8

Research: case study in an area of extreme deprivation

This section explores attitudes towards getting online among people living in an area of extreme deprivation in Glasgow.

Fourteen face-to-face interviews were conducted among people with no access at home to the internet. These people were drawn from a range of age groups (18 to 74 years) and socio-economic groupings (C2, D & E), living in areas of extreme deprivation in Glasgow city. Six locations were sampled:

Figure 8.1: Sampling points in Glasgow City



Crookston (1)
Govan (6)
Pollockshields (3)
Drumoyne (2)
Ibrox (1)
Robroyston (1)

Note: Further detail on the sample may be found in Annex B.

Glasgow was chosen because it is a city with areas that have particularly low levels of internet take-up. The research sought to establish what factors other than financial deprivation lay behind these low levels. The findings suggest that the barriers and drivers are not radically different in Glasgow than in other areas covered in the research. But the digital divide is more extreme between those who are disinclined and those who are predisposed to going online. And affordability is certainly more of an issue.

Figure 8.2: Glasgow City: basic indicators of multiple deprivation

The Glasgow City Council area, made up of seven constituencies, is unique in having the lowest life expectancy in the UK. The most recent data[43] put the average life expectancy at 78.0 years for females and 71.6 years for males, compared to the UK average of 82.3 for females and 78.2 for males. Comparatively, the city has one of the poorest health profiles of any UK city.

Around 40% of children live in households in poverty and 30% of working adults earn less than £350 per week.

8.1 Online access and access to community internet services

Ofcom's 2011 Communications Market Report for Scotland found that take-up is particularly low in Greater Glasgow at 50%[44], compared to elsewhere in the UK.

Glasgow is particularly well served by local libraries that offer free internet access, with 33 local libraries in the Glasgow City area. Most in our consumer sample claim that there is a library within walking distance of where they live or work. However, most said they had not considered using the internet services offered by these libraries.

8.2 Barriers to participation in Glasgow compared to elsewhere

The research suggests that barriers to participation are not radically different in Glasgow than in other areas covered in the research.

The indications are that the barriers are more exaggerated and the digital divide, between those who are disinclined and those who are predisposed to going online, is more extreme.

Broadly speaking the barriers that appear to be acting most strongly in this digital divide are:

- **Attractions of offline** (familiarity, habit, ease, speed and convenience of access to services through traditional channels)

[43]Office for National Statistics: Life expectancy at birth and at age 65 by local areas in the United Kingdom, 2004-06 to 2008-10. www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-223356

[44] Q1 2011, http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr11/scotland/4.2

- **Lack of support** (lack of access to informal help, lack of positive role models and peer pressure)

- **Low affordability** (and priority, in relation to the perceived benefit of going online).

The research among stakeholders found a clear sense of a vicious circle. Because so many people are not online, public service bodies and private companies are more inclined to provide their services via traditional channels. While the public sector has a responsibility to ensure that everyone can access public services, private entities see a commercial benefit to offering access through traditional channels (and also a potential commercial loss if they don't) – not just to people who are less digitally engaged. So, for many consumers, ease and convenience of access through traditional channels largely negates the need to go online.

The lack of influence from others around them, particularly friends, family and work colleagues, can also be seen to reinforce beliefs about the unimportance of online access. Among those we spoke to, many found it easy to avoid the potential stigma of being offline, as they mainly associated with people who were themselves offline. In Glasgow, and of course, in other areas where online use is particularly low, it is easier for offline habits and preferences to prevail. This, in turn, reduces any inclination or sense of 'permission' to seek help (either informal or formal).

"I like going out to the shops and meeting people - I don't want to be holed up in front of a computer"
(Non-user, female, 70)

"None of my mates are online - we prefer to talk to each other"
(Non-user, male, 45)

Affordability also appears to be a stronger barrier in Glasgow than elsewhere. The absolute cost of a computer (as well as the ongoing connection charges) is a significant barrier for some of the longer-term unemployed in the sample and those on very low incomes. For most though, cost is typically more about priority, with other discretionary purchases being viewed as more desirable and important. Preference therefore plays a key role in how (often very limited) budgets are spent. By the same token, the purchase of a computer was widely seen as a risk, with few feeling confident that they would get sufficient benefit from it in return.

"I have to be very careful with money. I can just about get by but, even if I wanted one, I couldn't afford a computer or the monthly payments"
(Non-user, male, 44)

"Don't get me wrong, it's quite a lot of money but if I thought it was worth it, it wouldn't be a problem"
(Non-user, male, 32)

Why are some people more likely to go online than others?

In Glasgow we found that there was a strong polarisation between those who would consider going online and those who would not. Those who would consider going online appear to be open to the idea of learning but claim to be held back by lack of awareness and availability of help (informal or formal).

The disinclined here appear to be outright rejecters. It would be difficult to convince them to go online without a significant increase in the support available. So stronger measures are required here than elsewhere, to encourage people to go online and to provide support that sustains their participation.

Experiences of front-line services in Glasgow

Very few people, and particularly the disinclined group, had considered using any formal sources of support.

The library was the default option for those who were more predisposed. When prompted, there was widespread awareness that libraries had computers. But many of the disinclined thought that the computers were there for established users rather than to support beginners. Others claimed that they did not feel comfortable about the idea of learning in a library environment.

Despite this, given the number of libraries in Glasgow and the fact that there was one within walking distance for everyone in the sample, libraries would appear to offer an excellent starting point. Misconceptions need to be overcome; the associations with 'dusty books' and 'clever people' using computers tend to be very off-putting.

Notably, two of the more predisposed in the sample had tried to sign up for a course – but were told they would have to wait at least 4-6 months due to demand.

Figure 8.3: Case study: Disinclined

JOHN

DISINCLINED

Profile

- 43 years old
- Single, lives on his own
- Large extended family but limited regular contact
- Poor outlook and health
- Mix of work experience – labouring, bars, cleaning
- Currently unemployed, including on sickness benefit
- Very low income – 'making ends meet'

Background

John is 43. He has a poor educational background. He left school at 15 and went into a technical college, where he learnt to be a carpenter. This has given him a start in getting work, but his poor health has meant he hasn't been able to do this type of work for long. His relatively poor health has meant he's been unable to hold any job for long.

He has done numerous different jobs over the years, including bar work, labouring, cleaning, etc. He would like to work as he doesn't enjoy living on the income he currently has.

He is currently unemployed and claiming sickness benefit. He is always looking for work and visits the different government offices for support in finding a job. It is difficult "there's nothing out there at the moment".

It is clearly a struggle to keep afloat – he relies on benefits and friends for help. "We exchange favours here and there – that's how you survive".

He has a large extended family in Glasgow but he doesn't seem them much.

Technology

John has had no experience of computers, apart from the help he is given at the Job Club to construct a CV. He certainly wouldn't feel comfortable or capable of using a computer on his own.

He understands that there are benefits – particularly buying things cheaper and sending out his CV – but he doesn't think he needs to be involved. He can always ask someone to do it for him if he needs to.

Outcome

If he really needs something then he could ask one of his family for help as some of them are online.

But he doesn't see much of his family, and wouldn't like to have to ask too often.

Motivation

He likes talking and face to face contact with people and doesn't like the idea of sitting behind a computer all day.

Support

John certainly can't afford to get a computer at the moment, and even if he could, he can't really see any benefits in it.

Most of his friends aren't online and feel the same way.

For people like 'John' who were disinclined to go online, the barriers appear to far outweigh the strength of any drivers:

"My friend is on Facebook and I hear stuff from her. My sister has a computer too but I'm just not interested in it. I don't see why I need a computer just to keep in touch. And all that you hear about twitter and Facebook it just seems rubbish. I've got friends in Turkey and they're all online, but I'm just hopeless. I don't think I could afford it either, I'm only working part time. I like the kindle though as I love reading, but it looks expensive" (Non-user, female, 55)

"I'm pretty busy at the moment, helping my sister move house. I've always got a lot on, I'm not sure I have the time. It looks pretty complicated and when the kids are on it, I just haven't got a clue. My kids have tried to tell me I should move with the times, but I'm 45 and I think I'm a bit too old for all that"
(Non-user, male, 45)

"My friend got a computer and used it for her business, but that's all stopped now and it just sits there gathering dust. I can't see the point in it"
(Non-user, female, 49)

However others, who were more like 'Joe' below, were much more positive about the possibilities online:

"I'd love to have a go. There're lots of things I could be doing - following up cooking programmes with the recipes, staying in touch with family abroad. I'm a bit worried that I might not be up to taking it all in, but I want to have a go (Non-user, female, 71)

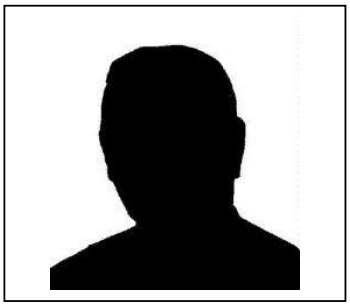
"I feel gutted when people talk about how much cheaper it is buying their holidays online. My daughter would get me the kit if I asked. She's been encouraging me to do it for a while, as have some of my friends. My problem is time - I don't know when I'll be working so a fixed course probably wouldn't work. I like the idea of the library"
(Non-user, male, 36)

"I'm fascinated by it. My brother lives in Canada and when I saw him last year for his birthday, we made a pact that we'd get online and talk. He's done it, I haven't yet. I love music too and have lots of old vinyl, which I hear I could probably sell online. I kick myself for not getting going - all the boys at work are on it. It doesn't scare me though; I think I'm intelligent enough to pick it up"
(Non-user, male, 45)

Figure 8.4: Case study: Predisposed

JOE

PREDISPOSED



Profile

- 43 years old
- Single, lives on his own
- Small family living locally
- Good health and positive outlook
- Outgoing and social
- Friends are online
- Part time painter and decorator
- Low income
- Average educational background

Technology

One of his friends is a school teacher and he is always using his computer for work and other things.
His friend has been encouraging him to get a computer for a while as he thinks Joe will get a lot out of it. Joe has watched his friend do things and he is beginning to feel a bit left out.
"It's all around us. I just think it would be a shame if I didn't have a go".

Outcome

Joe thinks he will sign up for a course, when he can. He asked in the library and there was a 4 month wait.

Background

Joe left school at 16 and went into a factory, which he didn't like at all.

He's done a variety of different work but settled on painting and decorating, because he could be more of his own boss. He's done this for more than 10 years.

Joe is quiet, polite and very mild mannered. He has lived in Govan all his life and has a brother and sister also living in the area. He sees them a bit but not very regularly. They have children but, again, he doesn't see them that much and has no idea if they have computers or not.

He has a good social life, though he would like to meet more people.

Motivation

He really wants to get involved and online now – particularly for the social side of things, plus storing things like photographs and generally looking around.

He has his concerns though that he won't be up to learning it – it will be too difficult for him.

Support

Joe decided a month ago to go to his library and ask about computer courses.

He knows his library quite well as he used to take out books and he has seen people using computers there.

He saw a leaflet in the library about beginners' courses and thought he'd ask. One of the staff there showed him the computer and sat with him for about 10 minutes to give him an idea. Joe thought it wasn't so difficult.

He thinks the library is the right sort of place for him to learn. It's informal, friendly and the staff seem well trained to help beginners. They're nice and they don't patronise him.

He'd prefer small classes, even 1-2-1, rather than a large classroom with lots of people. He feels he would get behind in that sort of environment.

Section 9

Research: delivery

In this final section, we look at issues that relate to the delivery of front-line services to people who want to get online.

We explore delivery in the broadest sense: from the views of senior stakeholders at a policy, campaigning and communication level, through to front-line coordinators and practitioners with direct experience of helping people to get online and develop their participation. The study draws particularly on the views and perspectives of those involved with and working for:

- National and government policy
- Academic research institutes
- Central and local libraries
- Voluntary and community organisations
- Skills and training providers
- UK online centres
- Digital Champions
- Niche providers
- Local authorities and housing associations
- Commercial providers (involved with campaigning and CSR programmes)
- Digital service providers including broadcast media, broadband and telecoms providers.

Overall, the focus of this section is on 'what works'. We include the views of stakeholders and front-line coordinators and practitioners about what needs to work better in the future -particularly as the task of reaching those offline and people who are less digitally engaged is becomes progressively more difficult.

9.1 Overview

In summary, the research suggests that there exists a wide range of local front-line resources. Much of the focus is on informal, incidental learning, with good evidence to suggest that this works well among those who are predisposed to wanting to get online.

A significant challenge remains in reaching consumers who are not predisposed to learning; and who require a sustained level of support in order to develop their engagement and participation.

Notably, the great majority of less digitally engaged people who took part in this research are not exposed to (and do not seek help from) these resources. Many also have misconceptions about what is on offer.

Many stakeholders point to the need to find better and more impactful ways to reach and have an effect on those offline and people who are less digitally engaged. Part of this is to improve awareness and understanding of, and signposting to outside resources.

Some stakeholders go further, saying that significantly better co-ordination of front-line resources is needed in order to improve reach and impact. Individuals and organisations should work in a more integrated, joined-up way under a single, well-recognized, banner.

To this end, there is evidence to suggest good coordination in parts of the UK; particularly in Wales and Northern Ireland. Coordination, more generally than this, is felt by some stakeholders to be quite poor.

Most front-line practitioners believe that the fact that they have to compete against each other for funding and recognition is a barrier to closer collaboration and effective coordination.

There is evidence of an innovative approach, taken by some front-line practitioners, that is reaching the 'harder to reach' and is providing them with a more sustained level of support. Examples of this are provided in Section 9.2.

Many practitioners are held back by a lack of funding and resources. This limits on the scope they have to:

- reach 'harder-to-reach' consumers;
- provide ongoing support for the journey; and
- provide support that is properly targeted and tailored to individual needs.

As some front-line practitioners put it, the problem is the focus on the *'low-hanging fruit'*; their finite resources are being used up by the needs of those who are more predisposed to wanting to get online.

"It's the problem of low hanging fruit. How do we divide our time between dealing with people who want to learn and those who don't?"(front-line practitioner)

9.2 High-level strategy

This section explores the issues that relate to the broader strategy, in terms of policy, coordination, messaging and campaign development.

Most stakeholders talk very positively about the national campaign to get people online, the thinking behind it, and its implementation. Most agree that the approach looks to have

worked particularly well to bring people and partners together and to focus attention on the importance of getting online.

This said, more than a few have an eye to the future and are inclined to question whether current strategy and implementation is strong and well-coordinated enough to impact on harder to reach groups. The findings from people who are less digitally engaged in this research largely support this view: a stronger and more impactful set of measures is needed in order to tackle the barriers that prevent consumers from participating fully.

The suggested areas of focus for the future, raised mainly by senior stakeholders, are:

- A stronger level of coordination is needed between key players and partners
- More needs to be done to encourage partners and front-line organisations to work under a single, recognisable banner;
- People's awareness of resources needs to be raised to reduce confusion and facilitate signposting to key front-line resources. This should include addressing people's misconceptions about community-based centres and libraries;
- The policy scope needs to be widened, to target resources that can be used to develop and sustain online engagement and cater better for individual differences;
- More emphasis is needed in the government's Digital by Default strategy to understand what motivates people to use offline channels, and to mirror this in the design of websites.
- There needs to be encouragement and support for the use of simpler, more user-friendly forms of technology (e.g. 3G-enabled tablets and smart TVs);
- A stronger degree of evaluation and accountability needs to be introduced, to identify what works and build on it to produce a positive and sustainable outcome.

These areas are explored in more detail below.

9.3 Co-ordination and working under a single banner:

It is clear from the evidence that there is no single solution. Consumers respond better to options that are tailored to suit their individual needs and preferences. People almost invariably get online and develop their capability by informal means.

Stakeholders and front-line practitioners have responded to this by providing a diverse range of approaches that work in different ways for different consumers. There are many positives to this diversity, although some stakeholders have identified drawbacks. The evidence from this research supports the view that a very high level of diversity, and variety of deployment, creates confusion, low awareness and poor signposting among people who are less digitally engaged.

More than a few stakeholders voiced concerns about a lack of co-ordination.

"It's too much of a free for all"

"There's no skeleton in the body"

"If we started all of this again, we wouldn't have organised it this way. It is all so disjointed"

"Everyone's doing their own thing. I think it is so confused"

"It's a piecemeal approach"

More specifically, confusion and low awareness appears to be caused by a plethora of different campaign brand identities, slogans and marketing materials.

The Go ON logo has been widely adopted. But the evidence from this research is that people who are less digitally engaged do not recognise it. Stakeholders point to a conflict between the desirability of working together under a single banner and the need for front-line organisations to stand out in order to attract funding and resources.

"It's inevitable that everyone ends up having to fight to stand out and get some kind of bang for their buck"

"Part of it is to try to get rid of the brand soup in the digital inclusion world. A whole range of different brands is confusing. Go ON is aimed to get consistency"

"It's hard to join up if you're trying to get funding for yourself. It reduces our imagination. We need to keep our enthusiasm"

"We've been successful in bringing people and partners together. The need is to bring them together under one banner, as much as possible"

Most of the evidence suggests the importance for key players to have the freedom to choose how they deploy. Few stakeholders favour any form of centralised control. What seems to be called for instead is more prominence and authority for the overarching initiative, among government, stakeholders and the general public, along with sufficient power to pull people together under one banner and facilitate better coordination and signposting at different stages of the journey.

"There isn't the authority or the structure there to pull things together"

"History shows that any attempt at centralised coordination will fail. It becomes too bureaucratic and unwieldy"

"It's a ladder of progression starting with informal at home – and then the need for something more formal to develop capability"

In addition to campaign identities, there are also many front-line brand identities, leading to further confusion.

"There are now so many organisations, each with a narrow remit and a need to promote themselves. It creates defensiveness and a resistance to new ideas"

"We need something more joined up. The tendency is more now for everyone to focus on their own organisation. What's needed is a larger generosity of spirit. Working with partners and sharing information"

"Bit of a feeling that everybody is seeking to protect their own brand. It works against the need for everyone to collaborate. It is starting to feel a bit self-serving. We need to collaborate"

9.4 Messages to generate awareness:

In the current climate large marketing campaigns were not seen to be possible. In any event, few stakeholders believe that big national campaigns would be effective, because the benefits message is so disparate.

Many stakeholders and front-line practitioners refer instead to the importance of embedding messages in UK broadcasting, with its potential power to influence and inform the hardest to reach, and those around them who could be encouraged to help.

"Embedding storylines into TV programmes that people watch. That's what we want. It drives people to us"

"The informal approach, like 'xxx' campaign is fantastic to encourage people, but it's not going to make a big difference. Where do people go after that?"

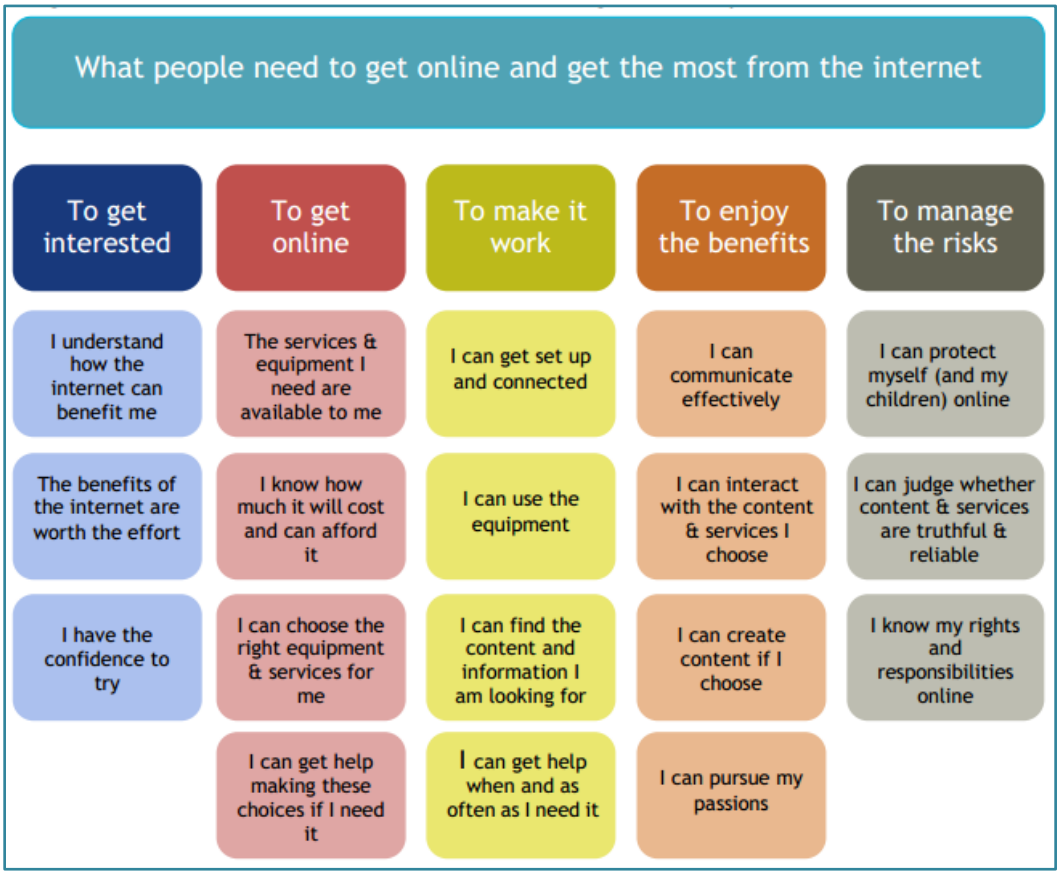
"We need clarity. We need to agree messages, pool resources, speak the same language and each understand where we fit into the big picture - not just carrying on in your own way. We need a set of joined up options that people are clearly aware of and can choose from"

9.5 Widening the scope:

We have explored stakeholders' views on the need to widen the scope in Section 5 of this report. In summary, there is a dominant view that it is important to focus on ongoing engagement rather than access, as in the National Plan's[45] five objectives based on the Panel's framework.

[45]National Plan for Digital Participation (Department for Business Innovation & Skills, March 2010)

Figure 9.1: Consumer needs-based Framework[46] for Digital Participation



The evidence suggests that much of the focus to date has been on the first two of these objectives. Limits on funding and resources inevitably place much of the focus on introducing consumers to the internet rather than providing ongoing support over the course of their journey. Many stakeholders agree that reaching those who are non-predisposed with a more sustained level of support is considerably more challenging.

There is, nonetheless, good evidence of a more progressive and innovative approach adopted by some front-line coordinators and practitioners, that can be seen to work to overcome some of these limitations, improve reach and widen the scope to provide a more sustained level of support among those consumers who are harder to reach.

9.6 Digital by Default:

Some stakeholders express quite strong views on the extent to which the government's focus on Digital by Default is counteracted by the imperative that both private and public entities have to cater to offline demand.

[46]Delivering Digital Participation: The consumer perspective. Communications Consumer Panel, May 2010

"Pushing people isn't going to work in my view. If you take the service away it will just cause resentment. We need to entice people by giving them reasons why it is better to go online. That's hard when people are given good reasons to stay offline" (stakeholder)

"It's not enough to just tell people about the benefits of going online. We need to understand why they do things offline. For example, people use the Post Office because it's part of their lives. Even people who are online still prefer the phone" (stakeholder)

"Government websites are better than they used to be, but there is a long way to go. Public services are very disjointed with different databases. It's a considerable challenge to convince someone that this is easier than picking up the phone. It often just isn't" (stakeholder)

9.7 The role of technology:

Some stakeholders believe that future technology and its design holds more promise in bridging the gap and putting the digital world more at the centre of people's lives.

"Technology is changing. It has to if we are to make the digital world more accessible and usable than the offline world" (stakeholder)

"We must find ways to deliver access through devices that are friendlier and easier to use. Interactive content through the TV is an example. It's right there, in front of people, and involves no set up" (stakeholder)

The kind of technology referred to is simpler and more intuitive in design, makes more and better use of familiar reference points, and requires little if any setting up. Key examples mentioned by stakeholders were smart TVs and 3G-enabled tablets.

There is evidence at the frontline that many practitioners are focusing on the use of desktop PCs and laptops, and are disinclined to experiment; in particular with tablets. The most common approach is to use desktops, laptops and dongles when working in outreach environments without Wi-Fi.

Some argue that tablets are not the best device to train people on as they are too expensive for people to buy themselves.

"We don't use iPads. They are too expensive for people to buy. It's not good to get them used to something that they can't afford to buy" (stakeholder)

Others, however, counter that a continued focus on PC-based technology is slowing the pace of online participation rather than facilitating it.

"There are so many different ways to get online. We don't focus enough on the alternatives. It feels like we are stuck with the old computer imagery: complicated, static, to be learned about in a classroom" (stakeholder)

Some stakeholders argue that, whatever type of device people learn on, it is essential for them to learn on their own device and the important goal is to enable access in the home.

Other stakeholders focus more on the importance of removing the burden and complication of set up; focusing in particular on the importance of free Wi-Fi access provision, particularly in social housing complexes.

"We've found that it's a lot easier to get people online if the network is already in there and in place. It's one big obstacle less for people to have to contend with" (Front-line coordinator)

9.8 Evaluation and accountability:

The *Digital Britain* report[47] and the National Plan looked at digital participation in terms of reach, breadth and depth:

- **Reach** covers internet access, the number of households online and numbers of citizens using the internet outside the home.
- **Breadth of use** refers to different modes of internet use and consumption, including communication, transacting, information, entertainment and use of public services.
- **Depth of use** refers to using social networks and content creation and sharing, including user-generated content and self-publishing.

The Report goes on to state that *"it is important to audit the extent to which people develop their skills and confidence as internet users as well as their presence online"*.

Some stakeholders express concern that the progress is too often measured by a reduction in the headline figure produced by ONS based on 'ever' and 'never' used the internet.

"There is a lack of really firm data. It's 8.2 million but we don't know the detail of the change and what has caused it. We don't know what's happened to those who say they have ever been online"(stakeholder)

[47]The *Digital Britain* report (2009), page 44; National Plan (2010), page 28

Others noted:

"ROI[48] is a good discipline for us all to subscribe to"(stakeholder)

"There is the danger that people on the front-line, understandably, will only share evidence that helps support what they are doing and to attract funding. It's not a good basis really" (stakeholder)

A range of quantitative data is available which analyses both take-up and breadth of use. Given the increasing need to focus on the journey, the evidence suggests the need to:

- measure what has happened to people who say that they have 'ever' been online;
- assess cause and effect; and
- understand why people fail to progress, or lapse.

Delivery

A number of areas were highlighted by stakeholders:

- A focus on informal, incidental learning
- Making better use of existing offline resources
- Informal partnerships and collaboration
- More formal joining up of resources
- Libraries and community centres
- Commercial Sponsorship and Corporate Social Responsibility
- Digital Champions

9.9 The focus on informal, incidental learning

There is a widespread and well-developed belief in the need to make the formal informal, with a strong emphasis on:

- Inspiring people to get online, along with others who can help.
- Focusing on interests and hobbies that can act as 'hooks' to motivate stronger levels of engagement.
- Encouraging social interaction, within which digital participation is a minor part.
- Introducing and helping to develop basic skills.

All of this is aimed to motivate people to believe that online participation is easier, more rewarding and beneficial than perhaps they might think. This focus on engagement and motivation rather than skills is widely regarded as the best and most practical way to get people online.

[48]Return on investment

"The key is to find what people's interests are. The technology is a by-product" (Front-line practitioner)

"It's designed to be non-threatening. We make it fun" (Front-line practitioner)

Case study 1 – Informal community-based learning

This Community and IT centre is relatively new and publicly funded. The centre reports that it has a good impact on those who have used it. As one visitor said, *"If I didn't come here I wouldn't know where else to go [to learn about computers].You've given me a reason to get up in the morning."*

The centre runs courses that are not qualification-based. The approach is to find interest hooks to engage and motivate people. Allowing people to learn at their own pace was a strong source of motivation to return to the centre. It was not what people expected it to be, i.e. a 'school' or a formal training course.

The centre also runs demos and 'have a go' sessions at supermarkets and shopping centres to reach people who are not aware of, or are not willing to come to, the centre.

The centre makes use of Digital Champions who are recruited from people who have attended the centre, using them to train their own peer groups.

The evidence from this research clearly supports the above approach for those who are more strongly predisposed to wanting to go online. People who want to learn respond well to informal tuition that allows them to learn at their own pace, as opposed to a structured course.

Among those who are not predisposed to seeking help, some front-line practitioners are concerned that, while the focus on informal, incidental learning is correct, its reach is limited; and among those who are reached, the scope is too narrow to bring about a sustained level of participation.

In short, the challenge is now to focus on 'stepping up a gear' to extend the effect and impact of incidental, informal learning.

"The hardest to reach are the most important" (front-line practitioner)

"It's going to get harder. We will need to reach out more, which is expensive and more time-consuming" (front-line practitioner)

In this respect, many front-line organisations are faced with challenges that are difficult to overcome, given the limitations of funding and resources. These are to:

- reach those who are not predisposed to participating;

- interact with them incidentally, where they are, rather than where front-line services are based;
- offer more than an introduction in order to bring about a sustained level of participation; and
- overcome the essential paradox: that access to incidental learning requires an active, conscious decision to want to learn.

Many stakeholders and front-line practitioners call for better signposting to front-line services. In particular more needs to be done to raise awareness and consideration among non-predisposed consumers and to correct the misconceptions they have about the formality of learning.

> *"The problem with a centre is that you need people to pluck up the courage to go. We [need to] operate in their environment"* (front-line practitioner)

> *"It's not just about a taster session. It's about taking people through a journey. It's only then that you can leave them to their own devices"* (front-line practitioner)

> *"A sign on the door works for some people, but outreach is key"* (front-line practitioner)

> *"We can't sustain the support for long enough. This is where things fall short"* (front-line practitioner)

9.10 Making better use of existing offline resources

The research provides evidence of a range of more innovative approaches that bring support to the user by:

- focusing on the environment that non-predisposed, low participation people are in (i.e. at home, in the workplace and in social housing developments);
- drawing on resources that are already in place; and
- making people feel that online is more of a part of their offline world.

> *"You have to look at the environment rather than just the person"* (front-line practitioner)

Two quite different examples of this serve well as case studies:

Case study 2 – Home support project for older people

Recently launched, this project aims to target around 13,000 older people over the next three years. The initiative uses existing staff resources to help people gain access to online services and raise awareness of the benefits of being online. Case workers have been issued with iPads to use during home visits, enabling them to work with clients to complete online forms, register for benefits, Skype maintenance people, scan documents and generally demonstrate the efficiencies of online activity and modern technology. Case workers will also refer those clients who have shown an interest in furthering their skills to other local projects or suitable venues for training if relevant.

Case study 3 – Engaging the help of others

This initiative is applied by a front-line entity. It involves engaging and facilitating other people to help get individuals online (i.e. people who might otherwise be acting as barriers to participation).

As an example, work is undertaken in a home for the elderly where the carers can sometimes be the barrier, if they are digitally excluded themselves. Encouraging the carers to go online and develop their own participation increases the scope for them, rather than the front-line practitioners, to do the job of engaging the elderly and encouraging them to participate.

In this way, the scope for ongoing support is extended, because the staff are engaged with the elderly on a continuous basis.

Two other initiatives are particularly worthy of mention. Both have succeeded in reaching the disinclined in a way that encourages a more sustained level of engagement.

Case study 4 – Central library

This library is located in the centre of a major city. Typically, it does not attract the non-predisposed group. It is particularly well resourced in terms of internet access and training courses designed to support absolute beginners through to those who have a more developed need to learn a particular skill or capability.

The library runs a series of co-location initiatives, giving over part of its space to a wide range of local entities, e.g. charities, health organisations and community initiatives working with minorities of various kinds. These entities run non-IT-related events which incidentally expose a variety of people to what the library has to offer.

Bringing people into the library environment who might otherwise be unwilling to go there works well to challenge misconceptions, giving library staff an opportunity to encourage take-up of online and computer-related training.

Case study 5 – Housing Association

Working with about 9,000 households, this Housing Association has a population made up almost entirely of Bangladeshi families – both new and 2nd and 3rd generation immigrants.

The community maintains strong cultural traditions. One of these traditions is for women to be mainly based in the home, with their daily lives focused on looking after their husband, children and, very often, their in-laws. They are therefore very difficult to reach. A way around this has been to set up a 'Fathers' Forum' within the association, encouraging the men to see the benefits of allowing their wives to study and learn both English and how to use computers.

As a result, women are being empowered to do basic courses, enabling them to get more out of being online; from filling in government forms, to health enquiries using NHS Direct.

As the front-line practitioner put it: *"We have one woman who had started to help at a nursery but was banned when her parents-in-law discovered what she was doing. Her husband joined the Fathers' Forum, and as a direct result his wife is now helping to teach some of the other wives basic English. It's a great example of the Forum being used to enlighten men to the benefits of their wives being allowed some freedom. He says his home is now a happier place"*.

9.11 Informal partnerships and collaboration

The research indicates that a number of front-line organisations succeed in developing informal partnerships and methods of collaboration. The aim is to pool resources and also to seek ways to extend reach and improve opportunities to bring front-line resources more into contact with harder-to-reach minorities.

Informal collaboration can also help to increase referrals and signpost people to appropriate help and support. Key examples included:

- Working with Shelter, to gain access to people who are at risk of becoming homeless.
- Links between training centres and Jobcentre Plus.
- Links to trade unions and Job Clubs.
- Links to schools and further education colleges to target and signpost NEETs.

While this can improve reach, many front-line practitioners acknowledge that the focus often remains on introducing people to the online world, because there is limited capacity and funding. Many found it more difficult to bring about partnerships in a way that would provide ongoing support. Some of these appear to be limited to signposting people to other sources of help. Success still depended too strongly on the extent to which consumers were predisposed to want to get online and develop their participation.

"We use Job Centre facilities to reach people who have no interest in getting online but want to find a job"(front-line practitioner)

"We work with trade unions and go into factories to help people who are faced with redundancy to manage their finances and put their CV online" (front-line practitioner)

"It's all very well to get out there and introduce people to it, but it's how we then get them to carry it on"(front-line practitioner)

9.12 More formal joining up of resources

The research provides some evidence of formal joining up of services among local government services and authorities, particularly in Northern Ireland and Wales.

A comprehensive assessment of local government services is beyond the scope of this report. The indications are, however, that the extent to which services are joined up varies according to the perceived importance of digital participation in relation to other priorities.

Stakeholders in Northern Ireland and Wales find it easier to implement a common strategy across government departments and third sector stakeholders, given these nations' smaller population sizes and more clearly identifiable areas of need (geographically and economically).

More generally, closer integration of public departments, private sector initiatives and the third sector was felt to have benefits in increasing impact, creating a shared aim and sense of ownership. This in turn was felt to work well to encourage people to see digital inclusion/participation as a solution (rather than an addition) to the highest of their priorities.

"Digital inclusion has developed as a separate industry which won't work. It is discarded by others thinking that someone else is taking care of it. It has no impact. Broadening it out, to a higher level aim and message, makes everyone feel they have ownership of it" (stakeholder)

"Before, local authorities failed to respond because they felt they had other priorities like regeneration and business creation. Re-positioning digital inclusion changes attitudes. Their priority now is inclusion because a superfast, connected city attracts new enterprise, brings new employment, opens shops and improves property values, and so on. Suddenly, they see the benefit and support it" (stakeholder)

The benefits of closer integration were also evident in linking digital participation more closely with the workplace, by using existing resources and adopting an incidental approach to learning, including formal staff training.

"We are developing digital champions in the workplace, via the unions. It is easier to be convinced by a colleague than your boss. It feels and sounds different; makes it more natural. People have no shame in expressing reluctance or fear" (stakeholder)

"We are making use of ready-made resources, and leveraging them. We work closely with the health service and train nurses with ICT skills. They go out into the community and are ideal because they are skilled at developing relationships with patients. Nurses are respected and get to know people's needs and their abilities" (stakeholder)

"We have a requirement that all front-line people have an ICT qualification" (stakeholder)

Similarly, links are also evident with other government departments related to literacy, under-achievement, social deprivation, unemployment and skills training.

"We see a literacy and numeracy need which, if tackled, will help to reduce stigma" (stakeholder)

In all, the aim was to bring about a better and more targeted set of remedies that were more sustainable and took more account of individual needs. This, in turn, was felt to be effective in getting more resources and funding from government.

"The aim is to get more resources from government which requires a strong business case that is based on sustainability and impact on communities" (stakeholder)

"An integrated approach is critical. Different people have different needs. There is no one-size-fits-all solution" (stakeholder)

9.13 Libraries

The evidence from the consumer interviews suggests strongly that libraries are not widely considered as a starting point for online training. The problem appears to be rooted in a misconception by consumers, rather than a lack of awareness.

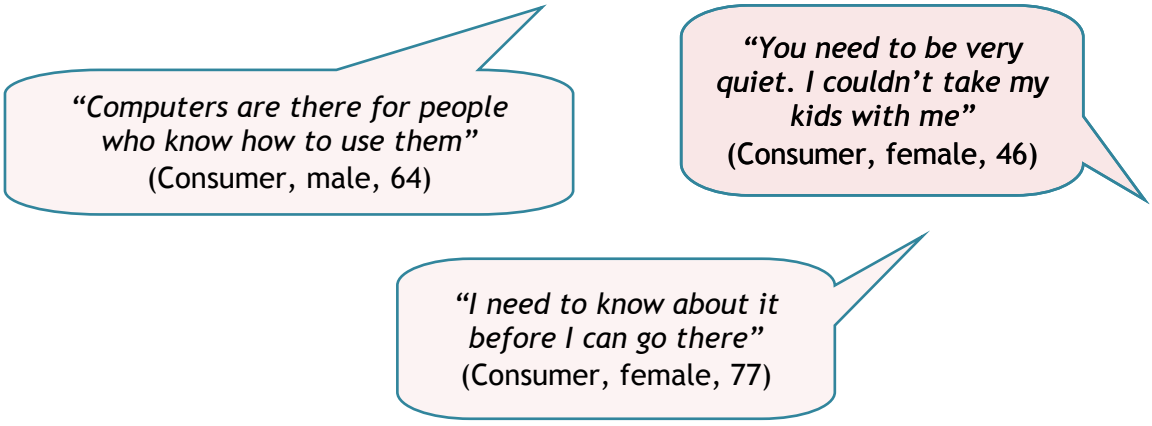
People who are less digitally engaged, who are not predisposed to wanting to learn, say that libraries, along with other community based services, are too formal. Some of the least confident believe that the library environment is unsuitable for them and even intimidating. They can be perceived to be more suited to the needs of more advanced users and those with a stronger educational background.

It follows from this that internet-related services offered by libraries appear to be relatively poorly promoted. Many stakeholders believe that libraries are under-utilised across the UK. Some express quite strong views in this regard given the locality, range and quality of resources that are in place and made available to consumers:

- well-trained, dedicated staff (many with digital training);

- secure online access;
- informal help and advice;
- a good range of structured courses and taster sessions (most of which are free); and
- good reach into local communities – with over 4,500 service points[49].

"I've never understood why libraries were not part of the Digital Britain report" (stakeholder)



9.14 Community centres

Community centres appear to suffer from similar misconceptions among people with low levels of digital engagement. These centres have the added challenge of low awareness. Much like libraries, the evidence is that community centres are poorly promoted.

The evidence from the consumer interviews suggests that consumer awareness is extremely limited, and that consideration comes mainly from word of mouth and/or a chance encounter (typically by virtue of a well-located centre, in a shopping centre for example).

Front-line practitioners claim that people who do attend these centres respond well to (and benefit significantly from) a user-friendly environment and an incidental approach to learning. The consumer evidence from this research supports this. However, the evidence is that people who are less digitally engaged, who are not predisposed to learning, are not aware of this kind of environment or approach. Even when these aspects are described to them, many still do not respond well to the idea

[49]The Role of Public Libraries in Promoting and Supporting Digital Participation; Museums, Archives, Libraries Council, 2010
http://research.mla.gov.uk/evidence/documents/public-libraries-and-digital-participation-mla.pdf

of attending. For many in the sample, the misconceptions are too strongly entrenched.

In the main, expectations among people who are less digitally engaged include that community-based centres:

- help to develop capability rather than introduce them to computing;
- are intimidating; they fear that they will be 'shown up' and their intelligence will be tested;
- are classroom-based and will not offer one-to-one tuition based on individual needs.

"I wouldn't want to be in one of those - I'd feel I would be the one always asking questions and holding people back"
(Consumer, female, 64)

"Sounds like you have to be online to know about it"
(Consumer, male, 50)

"I'm not so good at spelling and a big class would make me feel very intimidated, like school which I hated - I wouldn't do it"
(Consumer, male, 54)

9.15 Commercial sponsorship and corporate social responsibility (CSR)

The contribution from the relatively small sample of commercial partners and communications providers in this research suggest a diverse range of activities with widely differing objectives.

For many, the key driver is CSR, but such initiatives may also be driven by particular passions; e.g. child safety. Helping to drive forward digital inclusion/participation is also thought to motivate staff and convey the sense of being a 'force for good'.

Some initiatives are more strategic and tightly integrated with front-line services, with a strong, ongoing commitment. Others can be more stand-alone, tactical and short-lived.

> "*We are big enough to be able to develop a national strategy and apply it more consistently at a local level*" (stakeholder)

> "*It's a bit tactical for us because there is no funding at the moment that is dedicated to it. We've sponsored and been part of events; that sort of thing*" (stakeholder)

Different CSR agendas drive action. For example, some communications providers have a commercial interest in getting consumers in front of computers within the home. Others seek to promote the benefits of non-PC-based devices wherever they are.

> "*Our focus is getting computers into the home. There's a need for people to feel that they have ownership"* (stakeholder)

> *"There are so many different ways to get online. We don't focus enough on the alternatives. It feels like we are stuck with the old computer imagery: complicated, static, to be learned about in a classroom"*(stakeholder)

There is, in addition, some potential for brand confusion from the point of view of the consumer. Most commercial sponsors generally expect to get a return in terms of brand promotion. This can risk consumers believing that the activity is designed to 'sell' rather than inform.

> *"If we brand it, it is off-putting because people think that you are there to sell rather than encourage them. If we work under someone else's brand, it's harder to get the backing for it. It's a tricky balance" (*stakeholder)

> *"I think there's a role for commercial providers to stimulate the frontline to consider different approaches. There's a lack of altruism and creativity on both sides. We need to bring things closer together" (*stakeholder)

Overall, most stakeholders and front-line practitioners regard the involvement of commercial partners to be essential; not least in terms of what they offer by way of additional funding and resources. Many felt that the ideal ingredients for a successful outcome were for an event or an initiative to be properly coordinated, ongoing, co-branded and carefully aligned in terms of objectives and messaging.

9.16 Digital Champions

The evidence from the consumer interviews suggests strongly that people who are less digitally engaged benefit hugely from access to an individual with the enthusiasm, time and skills to help with set-up and provide ongoing support. There appears to be little doubt that, when connections are made between a motivated 'champion' and a consumer who requires support, meaningful online participation can be brought about.

Most stakeholders in the research considered Digital Champions to be informal rather than affiliated to an organisation. While some in the research's consumer sample (i.e. proxies) were actual or potentially strong digital champions, they were not aware of the Race Online 2012 (now Go ON UK) Digital Champion initiative.

Case study 6 – Digital Champion

This Digital Champion (DC) took early retirement, but wanted to do something valuable with her time, something that involved working with people. She answered an ad asking for volunteers at an adult learning centre, went along and did the training. At the end of the course she volunteered to be a DC.

The DC now helps to run absolute beginners' courses at the centre, and in the local library. She adapts the course to the people attending, and finds individual hooks to help attendees stay engaged. "One of my gentlemen writes poetry, and he wanted to be able to record the poems. So he learned how to use Word, and is now learning how to do email so he can send them to friends and family. One of my ladies, who's 80, has just got herself an iPad. She's really excited about it. She's going to use it to Skype family abroad".

"I really feel like I'm making a difference, particularly to my elderly clients. Computer terminology can be very confusing, as can all the 'security words' screens ask you to read. I have trouble reading them myself sometimes, so goodness knows how some people manage. But we're getting there. When my clients are able to send me an email all on their own, then it makes us both proud."

The research provides clear evidence that some people who are less digitally engaged have better access to a digital champion than others. Those who benefit the most are normally better connected socially and have a stronger quality of engagement with friends, neighbours, family members and work colleagues. The chances of coming across a 'champion' are significantly higher as a result of this. They are, in particular, likely to be close to hand and able to motivate, sustain interest, troubleshoot and provide ongoing support; the key ingredients of successful participation.

Others are not nearly so well connected and are therefore less likely to benefit unless they are predisposed to seek help. The evidence is that many are not so predisposed. In short, the evidence is that digital champions work very well when connections are made.

The challenge therefore lies in making the connections and, in particularly, reaching the less digitally-engaged. The difficulty is that it is hard, if not impossible, to assess what impact the digital champion network has, and whether it is possible to use it as a resource. None in the Proxy sample, helping others to get online and develop their capability, was aware of the formal Digital Champion initiative.

> *"I struggle with it. I don't know. What resource do you have to call on?"*
>
> *"Good for outreach. It's expensive to get out there. But how do we know what difference they make? There's no accountability"*
>
> *"Sustaining it is the key. We need a broader base to it"*

Section 10

The Panel's recommendations

Unless fundamental action is taken, the digital divide risks becoming a digital gulf as the distance increases between those who are online, with access to new services, technology and faster and faster broadband speeds, and those who remain firmly anchored in the offline world.

10.1 Summary recommendations

1. For government to be able to maximise growth and fulfil the Digital by Default initiative, there needs to be a clearer and more comprehensive policy on take-up and use of, as well as access to, broadband.
2. To enable this, there is a pressing need to strike a better balance between funding for broadband roll-out and funding for ongoing support to enable people to take full advantage of the benefits of the online world.
3. To ensure that progress is made, it is vital that initiatives are open and accountable and that clear targets are put in place for take-up and use, based on an agreed definition of what constitutes an 'active internet user' for these purposes. Closer co-ordination between initiatives across the UK, and an evaluation framework, would facilitate the accurate assessment and monitoring of progress.
4. The Panel considers that the frequently-quoted and widely-adopted measure of 'those who have ever/never used the internet' is not helpful for policy development. Progress should be measured by ongoing use, not by initial access alone. A more appropriate measure of people's ability to function online would be whether they have gone online themselves in the past month, together with an assessment of the breadth of their internet use.
5. Messages designed to encourage people to go online must acknowledge that people make an emotional and financial investment in going online. The messages need to explain online benefits in a language that connects with people's everyday life.
6. The Panel encourages suppliers to undertake the development of introductory low priced/low-risk products, teamed with low-cost broadband access, initially without long-term commitment, to reduce risk and promote trialling.
7. The tactics used to reach people who are not yet online need to be re-thought; and it is important that there is co-ordination between stakeholders, and agreed strategic aims. The potential role of local authorities, housing associations, employers and other related agencies and workers in the community (e.g. care workers) should be fully exploited, to embed awareness and an understanding of the possibilities online.
8. The Panel highlights the fact that the use of simpler technology, personalised support and emphasising the transferability of skills can bring real benefits for users and enable people to understand the usefulness of the internet.
9. The Panel strongly supports the drive to make websites simpler, designed around user needs and experience rather than those of the provider.

10. The Panel encourages coordinated overall support for agencies by Go ON UK, and a collaborative exchange of information. This would ensure a consistent message, and bring cost efficiencies for front-line agencies, to enable them to undertake more outreach activity.

10.2 Detailed recommendations

The Panel's detailed recommendations fall into seven main areas:

- Encouragement and motivation
- Device hardware/software
- Publicity and promotion
- Funding
- Support, assistance and training
- Co-ordination, collaboration and embedding
- Evaluation and accountability

1. Encouragement and motivation

Summary of recommendations

Promotional messages should acknowledge that online is a means to an end rather than an end in itself. The tipping point occurs when people choose to undertake a task online rather than offline because it is easy and convenient for them to do so.

Initiatives need to recognise that people need to make an emotional and financial investment to go online, and address their fears.

Initiatives need to articulate the reality of the benefits/value of being online versus the drawbacks of staying offline. Persuasive and tangible arguments should be made, especially in respect of financial benefits, time savings and social inclusion.

It is vital to use language that connects with people's everyday life – terms such as 'IT' and 'online' can appear to be overly technical to people who are not comfortable online, and may act as a deterrent.

The potential role of local authorities, housing associations, employers and other related agencies and workers other agencies and workers in the community (e.g. care workers) should be fully leveraged, to embed awareness and understanding of the possibilities online.

The research clearly highlighted the perception that for many, the online world was not for 'people like me'. To counter this, initiatives should try to 'normalise' the online world, stressing how everyday tasks can be done more easily online, or as a relevant complement to offline activities.

Seeing online activity as a complement to the offline world is less intimidating than seeing online and offline life as completely different worlds. Incremental steps can gradually encourage new users and boost confidence and skills. The tipping point occurs when people choose to undertake a task online because it is easy and convenient for them, rather than an unwelcome chore. The main message is that online is a means to an end rather than an end in itself: it is a means of saving money and time; of keeping in touch; of accessing information of interest, advice and services.

The research also highlighted that for some, there is plenty of motivation for staying offline. For them, the internet is associated with fear, and with lack of confidence, comfort, security and cost, for little or no perceived value. Addressing this requires work on three fronts: benefits, ease and ability.

Benefits: the arguments should essentially deal with return on investment (in respect of time and money). How much will this cost me? How much effort will it take? What do I get by being online? And what do I lose by not being online?

Ease: comes down to access (in its broadest sense) and support.-The challenge is to create an attractive proposition that people can understand and which they can (a) afford and (b) feel it worth spending money on.

Ability: it is essential that people have the confidence and skills as well as the equipment to get online and get the most from the internet.

Similarly, it is vital to use language that connects with people's everyday life – terms such as 'IT' and 'online' can appear to be overly technical to people who are not comfortable online, and so act as a deterrent. Initiatives need to recognise that people often need to make an emotional and financial investment to go online, and must address their fears, which may be reinforced by news coverage of security or privacy threats in the online world.

The potential role of local authorities, housing associations, employers and other related agencies and workers who come into contact with people within the community (e.g. care workers) is vital in embedding awareness and understanding of the possibilities online. Providing support and training will not only improve their own skills and potential life-chances but enable them to act as trusted 'digital champions' within their own communities. This is explored in more depth in Recommendation Section 6 below.

However, it is important to recognise that some people will make an informed choice not to go online and will be aware of the consequences of their decisions. Their right to access essential services and to exercise their right to democratic participation should not be undermined by this decision.

For the foreseeable future, there will be people who are not online at home. However, these people may well need, or will benefit from, access to online services, so, in line with the principles of Assisted Digital, easy and affordable access must be provided in trusted public places like post offices and libraries.

It is vital that the implications of Digital by Default are worked through and Assisted Digital continues to provide access to public services for those who are not online. The Panel hopes that government will undertake pilot studies of the implementation of Digital by Default, and will assess the support that will be required from public sector staff.

2. Device hardware/software

Summary of recommendations

The Panel encourages the development of introductory low-priced/low-risk products, teamed with low-cost broadband access

The Panel also encourages manufacturers of smart TVs to work closely with Go ON UK and stakeholders to facilitate easy internet access via the TV set.

The Panel also encourages broadband providers to explore providing free basic easily-updatable security to all their customers. Hardware manufacturers are encouraged to provide straightforward information to consumers.

Both front-line trainers and consumers who took part in the study highlighted that the technology itself can be intimidating. People who want to accomplish straightforward tasks can sometimes find themselves overwhelmed by the sheer complexity of the hardware/software and struggle with the limitations of older equipment.

Developments in internet-enabled devices have provided a wide range of methods by which people can access the internet. Tablets are perceived by some people as a less intimidating way to go online, while developments such as 'internet buttons' or apps can offer straightforward access to functions as well as increasing accessibility. In order to encourage people online, we need to look at disconnecting computing from what users see as 'computers' by also promoting the use of smartphones, tablets, and connected televisions. For some, moving away from the mouse and keyboard to touch-screens and apps will make access and use simpler.

Following on from the success of developments like the Raspberry Pi, and the recent alliance between Microsoft, Simplify Digital and TalkTalk to create a refurbished PC/ laptop plus broadband bundle, the Panel encourages the development of introductory low-priced and basic level hardware and software by suppliers that enables access and the ability to transact, but without additional features that the target audience is unlikely to use. Such devices could be made available in a package with cheap broadband access, highlighting an obvious pay-back (time saved, money saved through discounts, etc.) The Panel also encourages training initiatives to consider how they can use such developments in their offers.

The Panel would also encourage manufacturers of smart TVs to work closely with Go ON UK and stakeholders to facilitate easy internet access via the TV set.

The Panel encourages broadband providers to explore providing free, easily-updatable basic security to all their customers. Similarly, hardware manufacturers are encouraged to

provide straightforward information to consumers about recovery steps. Videos can convey complex information to consumers in an accessible format while hard-copy manuals should be provided by manufacturers to those who request them.

3. Publicity and promotion

Summary of recommendations

The tactics needed to reach people who are not yet online need to be rethought – the messages to reach those who have never been online need to be different from those aimed at lapsed users.

Collaboration between government departments, private sector initiatives and the third sector is essential. **But it is important that there is co-ordination between stakeholders, and clearly-stated, agreed strategic aims.**

Activity should take place under a unified badge, accompanied by individual organisations' branding, providing information about initial and ongoing support in clear, non-intimidating language.

There should be targeted marketing and promotion of the Go ON UK brand. This should be accompanied by consistent low-level background promotion to alert people to the fact that support is available for their digital journey.

Interviews with stakeholders confirmed that much has been achieved since the Panel first made its recommendations in 2010. But 2012 is a critical year as Race Online 2012 has reached its conclusion and Go ON UK has started work. The tactics used to reach people who are not yet online will need to be re-thought: the messages to reach those who have never been online need to be different to those for lapsed users.

Collaboration between government departments, private sector initiatives and the third sector is essential. But it is important that there is co-ordination between stakeholders, and clearly-stated, agreed strategic aims. Go ON UK needs to be closely involved with a variety of stakeholders to help influence its direction, and to shape policy and action.

The experience gained to date has highlighted the need for strategic, clear messaging which is based on carefully aligned objectives. The use of one recognised badge accompanied by individual organisations' branding, is vital if people are to perceive a unified theme in the campaigns and marketing. As noted above, the language used should not appear to be overly technical.

While individual campaigns may be short-lived, there is a danger of short-termism failing to embed the necessary messages. So while there should be targeted marketing and promotion of the Go ON UK brand, this should be accompanied by a consistent low-level background promotion to alert people to the fact that support is available for their digital journey (not just getting online) and point them to where they can find such support.

Engagement with the media, broadcasters, ISPs and large online aggregators and content providers, in accordance with the relevant regulation, is vital to promote the benefits of being online in addition to targeted social marketing campaigns at both national and local level."

4. Funding

Summary of relevant recommendations

For government to be able to maximise growth and fulfil the Digital by Default initiative, there needs to be a **clearer and more comprehensive policy on take-up and use of**, as well as access to, broadband.

The Panel considers that there is a **pressing need to strike a better balance between funding for broadband roll-out and funding for ongoing support** to enable people to take full advantage of the benefits of the online world.

The Panel considers that access alone will not deliver the full extent of a possible boost to GDP – pragmatic support for take-up is also required.

To equip people with the skills they will need to access essential services in an online environment, **funding needs to focus on their wider journeys**, rather than just the initial steps.

The Panel **encourages delivery organisations to review, as a matter of priority, how they can offer early access** to people wanting to go online.

The Panel **strongly encourages the reinstatement of free internet taster sessions, particularly in local authority, community and council premises (including Job Centres)** which have an important role to play in this area.

The Panel encourages collaborative funding applications to be firmly based on examples of local need, with clearly stated deliverables.

To date, much of the funding available has concentrated on the immediate goal of getting people online, rather than supporting people's wider digital journeys. But to equip people with the skills they need to access essential services in an online environment, funding needs to focus on their wider journeys, rather than just the initial steps. During this research, stakeholders spoke of their scope being constrained by funding. The provision of hardware and support for initial access is vital, but only part of the requirement.

For government to be able to maximise growth and fulfil the Digital by Default initiative, there needs to be a clearer and more comprehensive policy on take-up and use of, as well as access to, broadband. The government's broadband strategy refers to the aim of 90% of UK homes and businesses having access to superfast broadband by 2015, and a commitment to ensure that virtually all homes have access to a minimum level of service of 2Mbit/S by the same date. The European Commission target is for all EU citizens to

have access to a basic level of broadband (2Mbit/S) by 2013, 100% access across Europe to at least 30Mbit/S by 2020, and for 50% of EU citizens to subscribe to 100Mbit/S services by the same timescale.

The Strategy outlines that government wants the UK to have the best superfast broadband network in Europe by 2015. Broadband Delivery UK will be investing the £530m (including the existing underspend from the Digital Switchover Help scheme) secured as part of the Spending Review to bring superfast broadband to the third of UK homes and businesses which won't be provided for by the broadband market.

In the 2012 Budget, the Chancellor announced the government's plan to make Belfast, Birmingham, Bradford, Bristol, Cardiff, Edinburgh, Leeds, London, Manchester and Newcastle super-connected cities, as part of the £100m investment announced in the 2011 Autumn Statement. By 2015 this will deliver ultrafast broadband coverage to 1.7 million households and 200,000 businesses in high growth areas, as well as high-speed wireless broadband for three million residents. The government will also provide an additional £50m to fund a second wave of ten smaller super-connected cities. The devolved administrations have also funded nation-specific projects and set additional targets.

The Panel notes the conclusion of the recent report *Costs and Benefits of Superfast Broadband in the UK;* that a £1.1bn funding gap means that the government's targets for broadband are unlikely to be met. The report calls for action to ensure that under-investment does not affect the UK economy[50]. The Panel also notes that the report estimates that a rise in broadband penetration of 10% would lead to a 0.9%-1.5% boost in GDP per head. In discussing such figures, it is vital to bear in mind that access alone will not deliver such a boost to GDP – it is also dependent on take-up and use in those areas.

Stakeholders in this research highlighted that, in common with the rest of the economy, funding is increasingly stretched in this sector. The Panel encourages exploration of funding, aligned to government investment in superfast broadband (SFBB).The value of SFBB will be diminished if approximately 20% of the population does not go online; so investment in reducing that percentage is worthwhile and will payback in more efficient use of services, as well as improving inclusion and access to other enriching features. £530m for supply-side programmes is an important investment, but this needs to be matched by demand-side investment. There is a pressing need to strike a better balance between funding for broadband roll-out and funding for ongoing support to enable people to take full advantage of the benefits of the online world.

[50]Costs and Benefits of Superfast Broadband in the UK by Paolo Dini, Claire Milne and Robert Milne, LSE; http://www.netcracker.com/smartrevenue/downloads/LSE-Superfast-Broadband-Summary-May-2012.pdf

Support for digital inclusion programmes does not have to come only from government. The industry itself has also made significant contributions, while bodies such as the Nominet Trust remain important stakeholders on a number of levels.

The research found a number of examples of people who have expressed interest in taking their first steps online encountering a waiting list of four months or more. Such delays are likely to dampen the enthusiasm of all but the most ardent learner, and the Panel would encourage delivery organisations to review as a matter of priority how they can offer earlier access.

The Panel is also aware that some public organisations are now charging for introductory online taster sessions; e.g. £5 for one hour. The Panel is concerned that this level of charge, while insufficient to cover the costs of providing the training, is sufficient to discourage people who are not yet convinced of the benefits of going online at all. The Panel would strongly encourage the reinstatement of free taster sessions, particularly in local authority, community and council premises (including Job Centres) which have an important role to play in this area.

Some organisations noted that competing with similar organisations for funding discourages collaboration. In the Panel's experience, it is precisely those organisations that look to complement their strengths and show a willingness to collaborate that are looked upon favourably by funders. The Panel would encourage collaborative funding applications to be firmly based on examples of local need, with clearly-stated deliverables.

5. Support, assistance and training

Summary of recommendations

The Panel encourages the provision of in-home support, on people's own equipment, which allows the provision of detailed information and advice in a way which is almost impossible to provide in other circumstances.

The Panel would **encourage further exploration of the role that can be played by local support.**

Publicising the provision of internet access within a community, or the availability of training, should be a priority for organisations.

Access should also be encouraged in a wide range of institutions such as Jobcentre Plus, homeless hostels, youth clubs, libraries, post offices, gyms, football clubs, night clubs, churches, prisons, and army units.

The Panel highlights the fact that the **use of simpler technology, personalised support and emphasising the transferability of skills** can bring real benefits for users and enable people to understand the usefulness of the internet.

The research found significant evidence of good work by front-line stakeholders in this area. These recommendations are designed to support their work and to call on government and policymakers to put in place the required resources, support, realistic targets, timescales and long-term commitment to allow those programmes to grow.

Many of the people interviewed for this research expressed concern that the support was pitched at the wrong level for them – either too basic or too advanced, particularly if it was in a group setting. Undoubtedly many would prefer one-to-one support.

While some people are deterred from formal support *per se*, others lack awareness of what support is available – particularly in relation to their wider digital journey. Publicising the provision of internet access in a community, or the availability of training, should be a priority for organisations.

Access should also be encouraged in a wide variety of institutions such as Jobcentre Plus, homeless hostels, youth clubs, libraries, post offices, gyms, football clubs, night clubs, churches, prisons, or army units. Embedding training more deeply into the community would allow initiatives to take place in familiar locations and in partnership with existing organisations and agencies that people trust. Greater community engagement through clubs, communal homes, parish councils, and youth clubs would also enable members potentially to influence their own families or help drive more participation.

In 2010, the Panel highlighted that people needed 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 remains a need for people to be supported through this period, when they are inexperienced users who are likely to benefit from advice. In-home support, on people's own equipment, would allow the provision of detailed information and advice in a way which is almost impossible to provide in other circumstances.

The role of informal support - parents, cyber-buddies and peer groups – is invaluable in these situations. However, for those who have no-one to ask, life is more difficult. If a problem can't be resolved quickly, the user may give up for good. There is a gap in provision here; offline support for people who cannot access manufacturer-based support as they have an older or second-hand machine, and for those who do not have people on hand to ask informally.

The Panel would also encourage exploration of the role that can be played by local support – for example drop-ins at retailers – in the same way that Apple offers free workshops to iPad users. More could be also be done by a range of retailers to target and incentivise people with access to take up their services online. An example would be a food delivery retailer offering special discounts for older or disabled people if they order online.

As previously noted, the Panel believes that support must equip people with the skills they need to access essential services in an online environment, and focus on their wider journeys, rather than just the initial steps. Barriers – such as privacy or security issues – that people may encounter along the way may be as challenging as those at the start. Part

of supporting people's journeys involves actively identifying and highlighting to learners the transferable skills they have acquired.

The use of simpler technology, and emphasising the transferability of skills, can bring real benefits for users and enable people to understand the extent of possibilities online.

As noted above, people are reluctant to invest in long contracts for the provision of broadband if they are not yet convinced of the benefit of being online. For others, there needs to be a greater ability to get broadband access if they do not have a bank account.

6. Co-ordination, collaboration and embedding

Summary of recommendations

The Panel strongly supports the **drive to make websites simpler, and designed around user needs and experience** rather than those of the provider.

The Panel **recommends a review after 18 months into the embedding of the Digital by Default agenda** across government departments, **and the support provided by Assisted Digital**.

The Panel encourages **co-ordinated overall support for agencies by Go ON UK, to ensure that there is one** consistent message, and to bring cost efficiencies for front line agencies, to enable them to undertake more outreach activity.

The Panel highlights that a joined-up approach can produce significant benefits **when digital participation is considered as an integral part of other programmes,** e.g. health and education at both a national and local level. This is also of particular relevance for local authorities.

It is vital that initiatives are open and accountable. The Panel is calling for **greater collaboration and information exchange** between individual initiatives, academics, the public sector, industry and the third sector, to prevent unnecessary duplication of effort and the propagation of good practice.

The delivery of public services online should provide a level of co-ordination of advice equivalent to that available to people offline. The Panel encourages initiatives at a national and local level – including Digital by Default - to make websites simpler and designed around user needs and experience rather than those of the provider.

Following the implementation of Digital by Default, the Panel recommends a review, after 18 months, of the embedding of this agenda across government departments, and the support provided by Assisted Digital.

The research suggests that part of the participation problem stems from low awareness and confusion among low-participation groups. Closer co-ordination and collaboration between front-line training services could lead to a greater focus and awareness among the public, in addition to cost efficiencies for the organisations themselves.

The research has highlighted the success that can be achieved when initiatives are deeply embedded in local services. Such a joined-up approach can produce significant benefits when digital participation is considered as an integral part of other programmes, e.g. health and education at both a national and local level. This is particularly relevant for local authorities, as most are now commissioners of services. As such, they are in an ideal position to require, through the commissioning of services, that delivery agents provide support to people to develop their digital skills, to complement the roll-out of new services supported by superfast broadband.

Outreach activities, and aligning the provision of online experience with an activity or hobby, has also brought about significant success in some areas – be it among football fans or in pigeon racing clubs. Raising awareness and comfort levels in more formal settings may also be achieved indirectly by using such locations for a wider range of community activities.

Collaboration and the exchange of information between individual initiatives, academics, the public sector, industry and the third sector will help to prevent unnecessary duplication of effort and encourage the propagation of best practice.

7. Evaluation and accountability

Summary of recommendations

In evaluating whether the UK will be the best country in Europe for broadband by 2015, the Panel stresses **the importance of measuring take-up and use of broadband.** The Panel suggests that **government explore having specific targets** for 2013, 2014 and 2015 for a) the population as a whole, b) social groups D and E, c) disabled people and d) citizens over 65.

Such targets could **dovetail with the implementation of the Digital by Default agenda,** which should be implemented in stages.

The Panel considers that the frequently-quoted and widely-adopted measure of 'those who have ever been online' is not helpful for policy development. A more appropriate measure of people's ability to function online is **if they have gone online themselves in the past month, along with an assessment of the breadth of their use.**

The **evaluation of initiatives is vital** if there is to be accurate assessment of the success of approaches. This should be an integral part of an initiative's planning. Closer co-ordination between initiatives would facilitate the **accurate assessment and monitoring of progress**.

The Panel **encourages the development of an evaluation 'toolkit' to assist organisations and to provide consistency** of evaluation techniques.

In evaluating whether the UK will be the best country in Europe for broadband by 2015, the Panel stresses the importance of also measuring take-up and use of broadband –

specifically assessing progress more widely than just access to and speed of superfast broadband. It is not an acceptable outcome for a proportion of the population to use 25Mbit/S, while approximately 20% make no use of the internet at all.

The Panel suggests that the government explores having specific targets for 2013, 2014 and 2015 for a) the population as a whole; b) social groups D and E; c) disabled people and d) citizens over 65.

Such targets could dovetail with the implementation of the Digital by Default agenda, which should be implemented in stages when key take-up and usage targets are met, and effective Assisted Digital programmes are in place.

The *National Plan for Digital Participation,* published in March 2010, set a target for a 60% reduction in the 12.5 million people who were not active internet users by March 2014, with older people and the less well-off a particular focus.[51]

According to the latest published statistics from the ONS *Internet Access Quarterly Update 2012 Q1*[52], which measures the number of adults who have ever used the internet, the number of adults who have not used the internet stands at 8.1 million or 16.1% of the adult population. This compares with a figure of 10.2 million adults in Q1 2009.[53]

While there is no formal definition of what constitutes 'an internet user', the Panel believes that in order to truly assess progress against the policy intention, it is vital that the data capture the impact of initiatives and reflect people's ongoing use of the internet – and the breadth of their use.

The Panel considers that the frequently-quoted and widely-adopted measure of those who have 'ever' been online is not helpful for policy development. A more appropriate measure of people's ability to function online is if they have gone online themselves in the past month, together with an assessment of the breadth of their use.

The evaluation of initiatives is vital if there is to be accurate assessment of the success of approaches. This should be an integral part of the initiative's planning and not, as is sometimes the case, left until the end of the project when it is difficult, if not impossible, to assess cause and effect.

Many smaller initiatives will not have access to the research expertise necessary to evaluate projects. The Panel encourages the development of an evaluation 'toolkit' to

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[51] BIS: *National Plan for Digital Participation* (March 2010) http://www.digitalparticipation.com/sites/default/files/national-plan/National-Plan-Digital-Participation-Final.pdf Note: The 12.5 million people (adults) are those who don't 'actively use the internet' and is calculated using 2001 Census Data and Q1 2009 Ofcom Technology tracker data.
[52]This compares with ONS Q1 2009 which found an estimated 10.2 million adults who had never been online.
[53] BIS: National Plan for Digital Participation (March 2010) as above p28

assist such organisations and to provide consistency of evaluation techniques. Closer co-ordination between initiatives would also facilitate the accurate assessment and monitoring of progress.

Panel members

- Bob Warner (Chair)
- Fiona Ballantyne (member for Scotland)
- Kim Brook (ex-officio member representing Wales)
- Colin Browne (member)
- Roger Darlington (member for England)
- Maureen Edmondson (until 31 March 2012 - member for Northern Ireland)
- Chris Holland (co-opted member)

More information about the Panel's work is available at www.communicationsconsumerpanel.org.uk

If you would like to contact the Panel, or receive the Panel's monthly newsletter, please email contact@communicationsconsumerpanel.org.uk

Section 11

Annexes

Annex A: Policy Context

11.1 The Digital Britain Reports

In 2009 the then government began to outline its plans to ensure that the UK was at the forefront of the global digital economy. The *Interim Digital Britain Report*[54], published in January 2009, noted that "the digital information and communications sector is one of the sectors in the economy, alongside energy and financial services, upon which the whole of the economy rests…."Whilst noting successes in this area, Stephen Carter, then Minister for Communications, Technology and Broadcasting, stated that "we cannot rest on our past or present successes, not least because other countries are increasingly making the development of a digital, knowledge economy a centrepiece of their own economic development." The Digital Economy was intended to drive the upgrading of digital networks, enhance the national competitive position in these markets, secure competition for choice and quality in content, connect with the interests of the digital generation and "improve access, affordability and inclusion for all".

The report set out a view of the sector and an agenda for 'Industrial Activism' in the large number of areas where the markets meet public policy. The report identified five objectives:

1. Modernising and upgrading our wired, wireless and broadcasting infrastructure to sustain Britain's position as a leading digital economy.
2. Providing a favourable climate for investment and innovation in digital content, applications and services.
3. Securing a range of high quality public service content, particularly in news.
4. Developing the nation's digital skills at all levels.
5. Securing universal access to broadband, increasing its take-up and using broadband to deliver more public services more effectively and more efficiently.

The *Interim Digital Britain Report* drew response from a wide range of stakeholders, supplemented by online engagement through the Digital Britain Forum and other social networking/blog sites, structured engagements in each of the nations and a Digital Britain Summit at the British Library in April 2009.

[54] http://www.official-documents.gov.uk/document/cm75/7548/7548.pdf

Also in April 2009, the government's industrial strategy *Building Britain's Future: New Industry, New Jobs*[55] was published and re-stated the belief that Britain needed: "an active industrial policy if we are to maximise the benefits from the digital revolution. Doing nothing or leaving everything to the market would leave Britain behind. We need a clear and effective approach which is consistent, ensures full access, provides regulatory certainty, smarter public procurement and shows a readiness to intervene where necessary."

The *Digital Britain Final Report*[56] was published in June 2009. It outlined an ambition to secure the UK as one of the world's leading digital knowledge economies. It acknowledged that "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" is fundamental to achieving this ambition.

The report announced: "**Capability and relevance** are addressed through three routes: firstly, the recommendations of Baroness Morris's independent report on ICT user skills for adults; secondly, the Digital Inclusion Programme: we are pleased to announce the appointment of **Martha Lane Fox** as the new **Champion for Digital Inclusion;** thirdly, the Ofcom-led strategic review of media literacy and, to implement that, the emerging Consortium of Stakeholders, both public and private sector, willing to contribute financially and in kind towards greater digital participation. The Digital Britain Report brings these strands together, with additional funding for demand-side measures, in **a *National Plan for Digital Participation*** that combines an improved offer to increase motivation to get online, with social networking and outreach, and with skills training. The National Plan will be delivered through tailored local and community-based programmes which build on existing networks. These will draw on the lessons learned in the, to date successful, Digital Television Switchover programme."

In April 2010 Martha Lane Fox's role of Champion for Digital Inclusion was widened to become the UK Digital Champion which included strategic oversight of a new Digital Public Services Unit in the Cabinet Office charged with "ensuring departments achieve rapid progress on transferring and transforming services to online channels."[57,58]. Following the General Election, Martha Lane Fox was re-appointed as the UK Digital Champion by the coalition government in May 2010.

11.2 The National Plan for Digital Participation

Central to the ambitions of the Digital Britain initiative was the development of a National Plan for Digital Participation. The *National Plan for Digital Participation* was published by

[55] http://www.bis.gov.uk/files/file51023.pdf
[56] http://www.official-documents.gov.uk/document/cm76/7650/7650.pdf
[57] http://raceonline2012.org/sites/default/files/resources/ro2012_evaluation.pdf
[58] Letter from Gordon Brown to Martha Lane Fox, April 2010 http://www.labour.org.uk/gordon-browns-speech-on-building-britains-digital-future,2010-03-26

BIS (The Department for Business, Innovation and Skills) in March 2010[59]. The Plan stated: "The Digital Britain report identified Digital Participation as increasingly crucial for full participation in 21st century society, bringing extensive potential benefits for UK citizens, for the UK economy and for the provision of public services to meet today's citizen demand. We are at a tipping point in relation to the online world. It is moving from conferring advantage on those that have it to conferring active disadvantage on those who are without it."

The Plan noted: "There is a widely shared interest in increasing digital participation:

- For government, there are strong economic benefits, both in relation to building a stronger digital knowledge economy and in relation to unlocking the potential for improved government efficiency in delivering future public services.
- For industry, because of the benefits of a fully digitally-skilled workforce and because of the commercial opportunities that increased digital participation may bring.
- For citizens, because of the financial savings, access to formal and informal learning opportunities, employment potential, improved salary prospects and the many other advantages - economic, social and cultural - that being online can bring."

The Plan set a target for a 60% reduction in the 12.5 million people who were not active online, with a particular focus on older people and the less well off. The Plan noted that Digital Participation encompasses three distinct but interdependent strands:

a. **Digital Inclusion** was defined by government in the *Digital Britain* report as "the best use of digital technology, either directly or indirectly, to improve the lives and life chances of all citizens, particularly the most disadvantaged, and the places in which they live".

b. **Digital Life Skills** was defined in the Estelle Morris *Independent Review of ICT User Skills*[60] as the skills required to use a computer to safely enter, access and communicate information online.

c. **Digital Media Literacy** was defined as the ability to use, understand and create digital media and communications in the Report of the Digital Britain Media Literacy Working Group[61].

Specific Plans were also prepared for each of the devolved nations[62].

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[59] http://www.digitalparticipation.com/sites/default/files/national-plan/National-Plan-Digital-Participation-Final.pdf
[60] http://www.dius.gov.uk/~/media/3F79A51589404CFDB62F3DA0DEBA69A1.ashx
[61] http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/digitalbritain.pdf

11.3 The Digital Participation Consortium

The National Plan also put forward ideas about how to use social marketing techniques and targeted outreach to increase the numbers of people going online. This work was to be led by the Digital Participation Consortium, which was made up of over 65 representatives from industry and the third sector and chaired by Ofcom.

However, in summer 2010, as part of the major review of public expenditure, the government re-scoped the digital participation programme and announced that the limited funding available would be re-focused on supporting activities to encourage people to go online. This would be led by the UK Digital Champion, Martha Lane Fox.

The Consortium had planned to contribute to the objectives outlined in the *National Plan for Digital Participation* by:

- Enhancing existing stakeholder activity through wider support and/or alignment of effort.
- Developing new activity to address strategic gaps and unmet needs.

To help achieve the reduction in the number of people offline outlined by the National Plan, the Consortium wanted to lead a social marketing campaign and distribute funding for projects to help people get interested in and learn to use the internet. It would have focused on encouraging people aged 55+ and people from socio-economic group C2DE to get online by:

- Providing better **co-ordination** and encouraging meaningful **collaboration** between government, public, private and third sectors across the UK.
- Using **social marketing** to help change digital participation behaviour and t**argeted outreach** to provide extra support to those who needed it most.
- Encouraging and supporting the development of **national strategies** in the devolved nations.

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[62]Scotland's Plan can be found at https://dpcrosspartygroup.wordpress.com/related-strategies/dpsn/
Information about Wales' Plan can be found at http://wales.gov.uk/topics/housingandcommunity/regeneration/publications/deliveringdi/?lang=en
Information about Northern Ireland's Plan can be found at http://medialiteracyni.wordpress.com/2010/04/08/a-digital-participation-plan-for-ni/

11.4 Race Online 2012

Race Online 2012[63] launched in March 2010. Race Online 2012 called for urgent action to **inspire, encourage and support** millions more people online by the end of the Olympic year 2012, through partnership with **government, industry, charities** and individuals.

In June 2010, the new coalition government asked Martha Lane Fox to expand her role as UK Digital Champion advising government how to provide better, more efficient online public services and accelerating efforts to help more people benefit from the power of the internet.

The *Manifesto for a Networked Nation*[64] was published in July 2010. It included the following specific recommendations for action:

Inspiring more people to try the internet

1. Leaders at every level of industry, government and the charitable sector should embed manifesto challenges into corporate plans and make Race Online 2012 pledges by the end of 2010.

2. Industry and media partners should develop specific strategies to communicate the positive benefits of the internet to 10 million potential new online consumers.

3. Funding organisations should develop plans to do more to support charities, social enterprises and community groups to raise awareness of the benefits of internet use to the people whom they serve.

Encouraging people to go online and rewarding them for doing so

4. Government should expect people of working age to use some key online services and signpost those who need help to web access and training points.

5. We should expect adults starting informal or formal education, training and welfare to work programmes to have basic IT skills.

6. Race Online 2012 partners from all sectors should develop a package of rewards for going online and passing on web skills.

[63] http://raceonline2012.org/
[64] http://raceonline2012.org/sites/default/files/resources/manifesto_for_a_networked_nation_-_race_online_2012.pdf

Supporting those who need a helping hand

7. People must know where they can find local web access and/or training points and where they can go to get assistance with online public services, supported by local digital champions in every community.

8. We should work towards ensuring that people have easy and affordable access to the internet in the same way they can access water, electricity or gas.

9. Industry should ensure that products and services are usable and accessible for older and disabled people.

Capgemini's evaluation of the work of the UK Digital Champion and Race Online 2012 notes: "The Department for Communities and Local Government provided an initial grant of £2m for 2009-2010 and 2010-2011. The Department for Business, Innovation and Skills provided £313k in 2011, and the Cabinet Office provided a further grant of £650k for 2011-12. The variety of funding sources reflects the point made that several government departments and bodies had an active interest in digital participation."[65]

Capgemini's report also notes that "Over 1,300 organisations have become Race Online 2012 Partners and, in doing so, made a pledge to increase digital participation; Partners have publically committed to creating 100,000 digital champions and over half of these have already been created; over 11,000 members of the online public have pledged an hour to help someone online as part of the Go ON Give an Hour campaign; and Go ON events and programmes have taken place in several UK cities, including Liverpool and Leeds."[66]

Capgemini's evaluation noted that Race Online 2012 had a number of key achievements: they raised awareness; they created momentum; they secured commitment and increased delivery capacity; they accelerated and amplified Partners' delivery and they influenced policy makers to make 'digital by default' a reality.

Amongst Race Online 2012's key challenges, the Capgemini noted that there was a reputational risk in that "The Digital Champion and Race Online 2012 team set the scale of ambition by announcing bold aspirations. It was unclear whether they would be achieved in the timescales, but were intended to galvanise opinion and inspire action in a way that more pedestrian targets were unlikely to do. This approach presents a reputational risk as stakeholders may consider the aspirations as hard targets and become disillusioned and disengaged when they are not achieved." However the report noted that "This risk appears to have been managed well by the Digital Champion and Race Online 2012 team to date, as those interviewed did not criticise them for falling short of aspirations."

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[65] http://raceonline2012.org/sites/default/files/resources/ro2012_evaluation.pdf
[66] http://raceonline2012.org/sites/default/files/resources/ro2012_evaluation.pdf

The evaluation also highlighted that challenges included *Ensuring action that affects the target outcome*: "Whilst organisations and individuals have committed to increasing digital participation, in many cases it is not known to what extent they have delivered on their commitments or what direct impact Race Online 2012 Partners have had on the offline population."

These points illustrate why it is important for targets for take-up and use to be established – as outlined in the Panel's specific recommendations.

11.5 The Panel's role and the Consumer Framework for Digital Participation

The Panel considers it essential that people have the support, confidence, skills and equipment to get online and get the most from the internet. Without this, people will be unable to access the public services, information and entertainment that most people take for granted.

In March 2008, the Panel published a research report on advanced users of communications technology and services – *Switched on Consumers*[67], as a way of learning more about consumers who had integrated the newest communications technologies into their everyday lives. The research identified that they faced difficulties concerning privacy and the use of personal electronic data by others; the difficulty of navigating a path through the increasingly complex communications market; and a feeling of powerlessness in the face of the changes that these new technologies bring. The Panel used the results of this report to inform its subsequent work on digital participation and the internet.

The *Digital Britain* report set out a new term: 'digital participation', which it 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.' This was an important step in the right direction. However, the Panel was clear that to achieve digital participation successfully it was crucial that the various interested parties understood what this felt like from the perspective of citizens and consumers, and understood the different ways in which people might need help and support.

During the Digital Britain process, the Panel stressed the importance of avoiding an artificial divide between consumer empowerment –traditionally thought of as people having the information to choose and use the communications services that they need – and media literacy – then defined as people's ability to access, understand and create communications in a variety of contexts.

[67] http://www.communicationsconsumerpanel.org.uk/smartweb/digital-participation/switched-on-consumers

The Digital Britain project prompted widespread debate about the future of communications policy in the UK. Believing that the views of citizens and consumers should be central to the debate, the Panel commissioned research, *No one should miss out: consumers say what they want from the digital future*[68], which was published in February 2009. This research looked into consumers' needs, the role of communications services and devices in meeting them, and how this picture was likely to change over time.

In May 2010, the Panel published a range of reports, including a review of the literature and original research conducted by the Panel to help test its developing consumer framework for digital participation and to provide in-depth insight into people's digital participation journeys, brought together in *Delivering Digital Participation: the consumer perspective*[69].

To help government and others increase the number of people using the internet, the Panel developed the *Consumer Framework for Digital Participation*[70], which it also launched in May 2010. The Framework specifically addresses the issue of what consumers themselves have said they need to get online. Targeted at government and industry, the Framework brings together all the different elements that are needed to provide the help and support for people to get online and get the most benefit from the internet. The Framework sets out the citizen and consumer needs that underpin digital participation. It starts with the consumer experience and breaks down the journey that people make in getting online and then enjoying the benefits.

During development of the Framework the Panel met regularly with colleagues from Ofcom, the Department of Business, Innovation and Skills (BIS) and Race Online 2012, helping them use the framework and the research underpinning it to understand how the needs of consumers could be met. It also met with key stakeholders in the nations, industry and other relevant Ministers and government colleagues, to raise awareness of this issue.

The Framework was a key element of the *National Plan for Digital Participation*[71] and was used by the Consortium to help target and prioritise its work. The intention was that, by putting consumers first, the Framework would enable policymakers and service deliverers to:

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[68] http://www.communicationsconsumerpanel.org.uk/No%20one%20should%20miss%20out_digital%20future%20research%20report.pdf
[69] http://www.communicationsconsumerpanel.org.uk/FINAL%20DP%20SUMMARY.pdf
[70] http://www.communicationsconsumerpanel.org.uk/smartweb/digital-participation/the-consumer-framework-for-digital-participation
[71] http://www.digitalparticipation.com/sites/default/files/national-plan/National-Plan-Digital-Participation-Final.pdf

- **Highlight the particular needs of different groups:** different groups of people need different things to help them get online and get the most out of the internet.

- **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.

- **Target new provision:** identifying the particular needs of different groups and gaps in current provision, to enable new activity to be targeted in a way that achieves the maximum impact with the available resources.

- **Assess progress:** the Framework can be used to assess progress and evaluate activity and initiatives against how well they meet consumers' needs.

Following its research, the Panel also suggested the following as priorities for action:

- Campaigns to engage friends and family to help people recognise the potential of the internet.

- Embed the personal benefits of getting online in social marketing campaigns, giving examples of unusual ways in which the internet has met people's needs.

- 'Buddy networks', set up by providers of training and support, to give peer-to-peer support. 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.

- Help and advice to help people choose and set up equipment and services; most of the existing support was focused on helping people develop computer and internet skills.

- Signposting to join up the different sources of help and support.

- More research into the experiences and needs of disabled people; the little research that was available suggested that disabled people had particular problems due to the lack, or high cost, of accessible equipment and software.

- Government action to increase accessibility, through enforcing current accessibility guidelines and including accessibility requirements in all new contracts.

- Offline alternatives to online public service delivery, for those who are unlikely ever to get online.

11.6 Broadband strategy

The government's broadband strategy[72] refers to the aim of 90% of UK homes and businesses having access to superfast broadband by 2015, and a commitment to ensure that virtually all homes will have access to a minimum level of service of 2Mbit/S by the same date. The European Commission target is for all EU citizens to have access to a basic level of broadband (2Mbit/S) by 2013, 100% access across Europe to at least 30Mbit/S by 2020, and for 50% of EU citizens to subscribe to 100Mbit/S services by the same timescale.

The Strategy outlines that government wants the UK to have the best superfast broadband network in Europe by 2015. Broadband Delivery UK will invest the £530m (including the existing underspend from the Digital Switchover Help scheme) secured as part of the Spending Review to bring superfast broadband to the third of UK homes and businesses for whom the market will not provide. Local authorities and other public bodies developing Local Broadband Plans must identify their plans to stimulate demand for the superfast network from both local people and local businesses.

In the 2012 Budget, the Chancellor announced the government's plan to make Belfast, Birmingham, Bradford, Bristol, Cardiff, Edinburgh, Leeds, London, Manchester and Newcastle super-connected cities, as part of the £100m investment announced in the 2011 Autumn Statement. By 2015 this will deliver ultrafast broadband coverage to 1.7 million households and 200,000 businesses in high growth areas, and high-speed wireless broadband for three million residents. The government will also provide an additional £50m to fund a second wave of ten smaller super-connected cities.

11.7 Digital by Default and the Government Digital Service

The Government Digital Service (GDS) – part of the Cabinet Office - was launched in December 2011 with the role of transforming government digital services by ensuring that the government offers "world-class digital products that meet people's needs"[73]. The team was established following Martha Lane Fox's report: *Directgov 2010 and beyond: revolution not evolution*[74].

In her 2010 report to the Minister of the Cabinet Office, Francis Maude, Martha Lane Fox notes that she undertook the requested strategic review of Directgov "in the context of my wider remit as UK Digital Champion which includes offering advice on how efficiencies can best be realised through the online delivery of public services. This means that I have not reviewed Directgov in isolation but as part of how the government can use the internet, both to communicate and interact better with citizens, and to deliver significant

[72]http://www.culture.gov.uk/publications/7829.aspx
[73]http://digital.cabinetoffice.gov.uk/about/
[74]http://www.cabinetoffice.gov.uk/resource-library/directgov-2010-and-beyond-revolution-not-evolution

efficiency savings from channel shift[75]". The report called for improvement to Government internet services to provide higher quality and more convenient 24/7 services to users and argued for a channel shift that would increasingly see public services provided digitally 'by default'.

As well as delivering better services for citizens, it was stated that transferring 30% of government service delivery contacts to digital channels had the potential to deliver gross annual savings of more than £1.3 billion, rising to £2.2 billion if 50% of contacts went to digital.

GDS' role encompasses encouraging government departments to 'think digital' and also to put users' needs first.

GDS states that its seven digital principles[76] are:

- Putting the public first, in delivering digital public services
- Digital by Default
- Putting users first
- Learning from the journey
- Building a network of trust
- Moving barriers aside
- Creating an environment for technology leaders to flourish
- Don't do everything yourself (you can't)

Its nascent design principles build on, and add to, its original digital principles.[77]

1. Start with needs
2. Do less
3. Design with data
4. Do the hard work to make it simple
5. Iterate. Then iterate again.
6. Build for inclusion
7. Understand context
8. Build digital services, not websites
9. Be consistent, not uniform
10. Make things open: it makes things better

In early 2012, the GDS launched a beta version of the gov.uk website which intends to pull together a host of government services into a single domain.

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[75] http://www.cabinetoffice.gov.uk/sites/default/files/resources/Martha%20Lane%20Fox's%20letter%20to%20Francis%20Maude%2014th%20Oct%202010.pdf
[76] http://www.flickr.com/photos/benterrett/7041509709/
[77] https://www.gov.uk/designprinciples

11.8 Assisted Digital

Recognising that many vulnerable and disadvantaged people are among those still offline, Assisted Digital is a term used to describe a range of developments, strategies, and actions aimed at ensuring that no one is left behind. Assisted Digital[78] has a wide remit and the GDS states that it is working with departments and service providers to think through the definition and structure delivery alongside the Digital by Default agenda. The GDS anticipates that a tiered programme of support is likely to include:

1. In the short term, providing access to non-digital channels by exception for those who need them, such as through 'click and print' services for paper forms.
2. Providing an interface to digital services where non-digital elements are required e.g. ID verification.
3. Providing physical access and/or support to use digital channels e.g. through internet terminals for those without internet connections and face-to-face support to input data for those without internet skills.
4. Signposting to internet training for those requiring digital skills e.g. via UK Online centres, libraries etc.
5. Help ensure that the development of new services – designed to be digital by default – are accessible and usable for service users.

The GDS states that Assisted Digital is planned to build on existing initiatives aimed at getting people to use digital channels and current infrastructure that facilitates access to digital services (e.g. UK Online and libraries).Assisted Digital will also identify and develop:

- Alternative and shared non-digital delivery channels (e.g. post offices).
- Specialist solutions for specific groups (e.g. blind, disabled, elderly, etc.) by working with special interest groups.
- An improved understanding of how wider government policies affect the digital agenda (e.g. local government and policies on localism)

The GDS sees Assisted Digital as a step-change from previous approaches taken by government in tackling digital inclusion, because Assisted Digital is predicated on services being digital by default rather than offering a multi-channel approach to service delivery.

According to the GDS, it is about taking a more proactive approach to getting people online and thereby sharing the benefits available from being online."If successful, Assisted Digital will see more people get online to access public services; which are more conveniently accessible, easier to use, and therefore the preferred choice of service users."

[78] http://digital.cabinetoffice.gov.uk/category/assisted-digital/

11.9 Digital Advisory Board

In April 2012, the establishment of a Digital Advisory Board was announced by Francis Maude, Minister for the Cabinet Office[79]. Bringing together digital experts from industry, business and academia, the Board is intended to support the government in delivering its commitment to provide high-quality public services online by default.

Chaired by UK Digital Champion Martha Lane Fox, the Digital Advisory Board will advise and support the Government Digital Service, departments and agencies. The Board is intended to offer ideas and recommendations on the best way to achieve the digital transformation and ensure that government online services are easy to access and user-friendly. The Board will meet formally at least twice a year and will also take part in ad-hoc events and bilateral pieces of work with government as required.

11.10 Go ON UK

In April 2012, Race Online 2012 was succeeded by Go ON UK. Chaired by Martha Lane Fox, Go ON UK describes itself as a "radical cross-sector partnership to make the UK the world's most digitally capable nation where no one – old or disadvantaged- and no organisation – even the smallest – is left behind…Go ON UK will pick up the baton from Race Online 2012 to get the final 8.2 million online and encourage everyone to improve their digital skills". Go ON UK has positioned itself as being at the heart of a new partnership, acting as a coordinator and as a resource for organisations and individuals, committed to helping every person and every organisation in the UK enjoy the benefits of the internet.

Go ON UK notes that "the UK is struggling to exploit the broader benefits of the internet as digital skills become increasingly vital tools to access education, information, jobs, consumer savings and social contacts"[80].

It has stated that it will work with its partners in all sectors to raise awareness of these benefits, and put in place the practical steps needed to ensuring all organisations make the best use of digital technologies and are not left behind. Acknowledging the need for a sound evidence base, Go ON UK has announced that one of its initial tasks will be to develop plans based on new research to establish the digital capability of the nation.

In addition to building a new online hub, Go ON UK states that it will build on the local digital champion network and challenge UK government to develop and deliver first-rate

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[79] http://www.cabinetoffice.gov.uk/news/new-digital-advisory-board-supports-government-deliver-online-services-revolution
[80] http://www.go-on-uk.org/category/about/

digital public services, as well as conducting a review of ways to increase funds and resources.

Annex B: Methodology

Qualitative research was conducted to obtain an in-depth understanding of attitudes, behaviours, beliefs and feelings. In addition, the research with consumers was based on observation in people's homes to obtain a richer picture of living conditions along with how technology is used in the home.

A number of stakeholders working in a range of related areas were contacted and asked to indicate if they were willing to take part in the research. Futuresight was supplied with details of senior stakeholders from a range of areas. Stakeholders then suggested front-line delivery participants and digital champions. Futuresight then chose the sample, selecting participants to represent a range of delivery services and a geographical spread.

The research programme was split into three stages:

Stage 1: In-depth interviews (face-to-face and by telephone) with senior stakeholders, front-line practitioners and digital champions.

Stage 2: In-home visits among people who are less digitally engaged.

Stage 3: In-depth interviews (face to face) among consumers who have never been online and are living in an area of extreme deprivation.

Across all three stages, the research was designed to consider the UK as a whole, i.e. England and the devolved nations of Northern Ireland, Scotland and Wales.

This was qualitative research designed to explore the ground, uncover insights and provide direction. The findings are indicative only.

Stage 1:
Interviews with senior stakeholders, front-line practitioners and digital champions

Given the breadth and volume of services available across the UK, the research for this stage cannot be representative of all feedback on delivery across all services. Instead, the aim was to provide a 'flavour' of learning and experience. The findings for stage 1 must therefore be considered to be illustrative and not comprehensive.

The interviews were anonymised to respect participant confidentiality. None of the comments made in this research are attributed in any way to individual contributors.

Each interview lasted between 45 and 90 minutes. The interviews covered the following main topics . . .

Stakeholders	Front-line Practitioners & Champions
Introduction Their role, experience and responsibilities	Introduction Their role, experience and responsibilities
Digital participation Views of it as an objective	Digital participation Views of it as an objective
Digital participation In more depth. How it is, or can be, meaningfully applied	Themselves / their organisation Remit and aims
Beliefs about what works How is it best to get and keep people online	Who they work with The kinds of consumers they meet and offer support to
Opportunities and challenges Now and in the future	Beliefs about what works How is it best to get and keep people online
	Opportunities and challenges Now and in the future

Stage 2:
In-home visits among people with low levels of digital engagement

A total of 48 consumers (12 per digital engagement segment) were selected randomly from 14 points across the United Kingdom. Coverage included urban, suburban and rural areas. In-home visits took place in January and February 2012.

Figure 11.1 Representation of low digital consumer segments in the four nations

Scotland (8):

- Glasgow (4)
- Edinburgh (4)

Northern Ireland (8):

- Belfast (8)

Wales (8):

- Swansea (4)
- Cardiff(4)

North England (12):

- Liverpool (4)
- Manchester (4)
- Sheffield (4)

Midlands (6):

- Nottingham (2)
- Leicester (2)
- Birmingham (2)

Southern England (6):

- Croydon (2)
- Southampton (2)
- Plymouth (2)

These in-home visits were conducted among lapsed, proxy, narrow and new users, with the aim to understand the barriers and triggers to participation. Each visit was approximately 90 minutes in duration. A detailed observational and interview guide was used. Video and audio recordings were made subject to the participants' permission.

The content and order of main topics covered in these interviews was as follows . . .

Introduction
Background, work, interests, household composition, etc.

Activity
Typical week in their life

Devices in the home
Interest, attitudes and beliefs about technology

The internet
Attitudes to online usage and the internet
Current online experience and skills (if any)

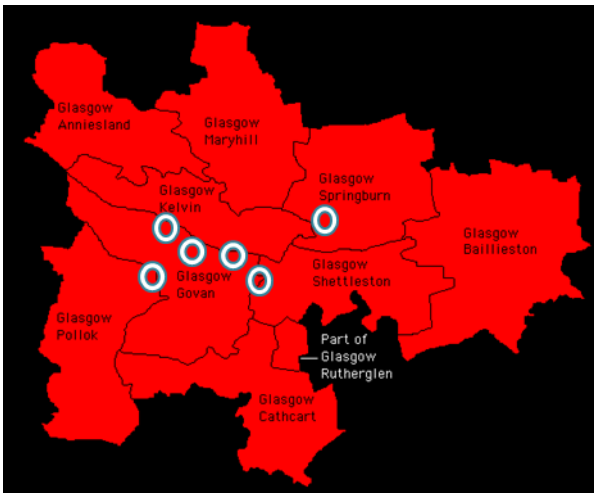
Online usage as a journey
Key sources of influence
Barriers and triggers to participation
Sources of support (informal and formal)

Requirements for online engagement & development
Now and in the future

Stage 3:
In-depth interviews in an area of extreme deprivation

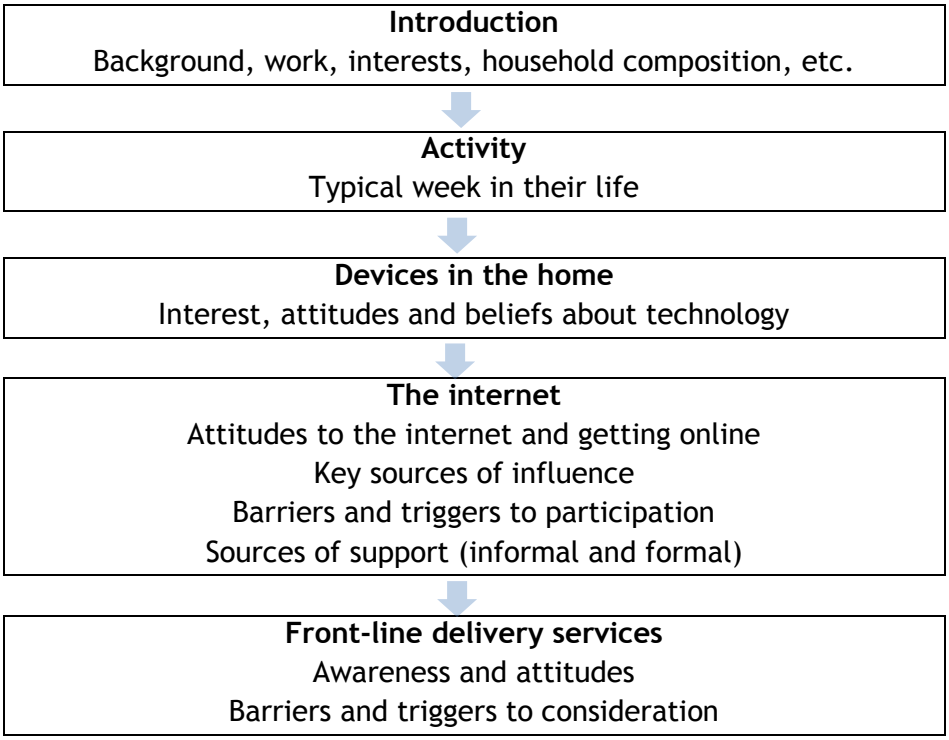
The add-on study which sought to investigate offline consumers in an area of extreme deprivation was conducted in Glasgow. A total of 14 individual in-depth interviews were conducted among offline consumers. None had any experience of online usage. Interviews were conducted in February 2012.

Figure 11.2 Representation of offline consumers in constituent areas of Glasgow



Crookston (1)
Govan (6)
Pollockshields (3)
Drumoyne (2)
Ibrox (1)
Robroyston (1)

Each visit was approximately 60 minutes in duration. A detailed interview guide was used. The content and order of main topics covered in these interviews was as follows:



Annex C: Sample breakdown for Stages 2 & 3

Table 11.1 Lower digital engagement consumers – Lapsed segment breakdown

Region:	Location:	Segment:	Gender:	Age:	SEG	Marital status	Location type:
Scotland	Edinburgh	Lapsed	Female	58	E	Divorced	Suburban
Scotland	Glasgow	Lapsed	Male	53	D	Married with children	Suburban
Wales	Cardiff	Lapsed	Male	52	C2	Married	Urban
Wales	Swansea	Lapsed	Male	65	D	Married	Rural
Northern Ireland	Belfast	Lapsed	Male	54	C2	Single	Suburban
Northern Ireland	Belfast	Lapsed	Female	65	E	Married	Suburban
North England	Liverpool	Lapsed	Female	64	D	Single	Suburban
North England	Manchester	Lapsed	Male	44	D	Single	Suburban
North England	Sheffield	Lapsed	Male	54	E	Married	Urban
Midlands	Nottingham	Lapsed	Male	55	E	Married	Suburban
South England	Plymouth	Lapsed	Female	75	C2	Widow	Rural
South England	Southampton	Lapsed	Male	44	D	Married with children	Urban

Table 11.2 Lower digital engagement consumers – Narrow segment breakdown

Region:	Location:	Segment:	Gender:	Age:	SEG	Marital status	Location type:
Scotland	Glasgow	Narrow	Male	49	C2	Married empty nester	Urban
Scotland	Edinburgh	Narrow	Female	63	E	Married empty nester	Suburban
Wales	Cardiff	Narrow	Female	69	D	Single	Rural
Wales	Swansea	Narrow	Female	61	E	Single	Urban
Northern Ireland	Belfast	Narrow	Male	65	D	Married empty nester	Suburban
Northern Ireland	Belfast	Narrow	Female	44	C2	Married	Suburban
North England	Liverpool	Narrow	Male	69	E	Divorced	Suburban
North England	Manchester	Narrow	Female	54	C2	Single	Urban
North England	Sheffield	Narrow	Female	57	D	Married empty nester	Urban
Midlands	Leicester	Narrow	Male	60	E	Married empty nester	Suburban
Midlands	Nottingham	Narrow	Male	74	E	Widowed	Urban
South England	Southampton	Narrow	Female	51	D	Married with children	Urban

Table 11.3 Lower digital engagement consumers - New segment breakdown

Region:	Location:	Segment:	Gender:	Age:	SEG	Marital status	Location type:
Scotland	Edinburgh	New	Male	61	D	Divorced	Suburban
Scotland	Glasgow	New	Female	24	E	Single mother	Urban
Wales	Cardiff	New	Female	28	E	Single mother	Suburban
Wales	Swansea	New	Female	66	E	Single	Urban
Northern Ireland	Belfast	New	Female	55	E	Single	Suburban
Northern Ireland	Belfast	New	Male	69	E	Single	Suburban
North England	Liverpool	New	Female	69	D	Single	Suburban
North England	Sheffield	New	Male	27	E	Cohabiting	Suburban
North England	Manchester	New	Male	55	D	Married with children	Rural
Midlands	Birmingham	New	Female	73	E	Married empty nester	Suburban
Midlands	Leicester	New	Female	62	E	Married with children	Suburban
South England	Croydon	New	Female	21	E	Living with parents	Suburban

Table 11.4 Lower digital engagement consumers - Proxy segment breakdown

Region:	Location:	Segment:	Gender:	Age:	SEG	Marital status	Location type:
Scotland	Edinburgh	Proxy User	Male	60	B	Married	Suburban
Scotland	Glasgow	Proxy User	Female	54	C2	Married with children	Suburban
Wales	Cardiff	Proxy User	Male	49	B	Married	Suburban
Wales	Swansea	Proxy User	Male	56	D	Married with child	Suburban
Northern Ireland	Belfast	Proxy	Male	44	B	Living with partner	Suburban
Northern Ireland	Belfast	Proxy	Female	44	C2	Single	Suburban
North England	Liverpool	Proxy	Male	44	D	Married with children	Suburban
North England	Manchester	Proxy	Female	29	C1	Single	Suburban
North England	Sheffield	Proxy	Male	20	C2	Cohabiting	Suburban
Midlands	Birmingham	Proxy	Female	38	C1	Cohabiting	Suburban
Midlands	Redditch	Proxy User	Female	65	C2	Single empty nester	Rural
South England	Croydon	Proxy User	Female	58	C2	Single	Suburban

Table 11.5 Offline Consumers in Glasgow - sample breakdown

Location:	Segment:	Gender:	Age:	SEG	Marital status	Location type:
Glasgow	Offline User	Female	71	D	Married	Suburban
Glasgow	Offline User	Male	45	E	Single	Suburban
Glasgow	Offline User	Male	45	E	Divorced	
Glasgow	Offline User	Male	44	E	Single	
Glasgow	Offline User	Female	50	E	Single parent	Suburban
Glasgow	Offline User	Male	36	D	Married	Suburban
Glasgow	Offline User	Female	70	C2	Married empty nester	Suburban
Glasgow	Offline User	Male	47	E	Single	Suburban
Glasgow	Offline User	Female	57	D	Single	Suburban
Glasgow	Offline User	Male	55	D	Married empty nester	Suburban
Glasgow	Offline User	Female	49	D	Single	Suburban
Glasgow	Offline User	Male	32	D	Married	Suburban
Glasgow	Offline User	Female	71	C2	Widow	Rural
Glasgow	Offline User	Male	39	C2	Divorced	Suburban

Annex D: Research Update

Section 1

Key points

The observations detailed in the 2010 Panel's research review[81] remain broadly relevant.

Some further points to note:

- Internet home access continues to increase but there is some evidence that it is beginning to level off and certain hard-to-reach groups remain offline.
- Internet access is increasingly mobile and new types of connected devices are beginning to find audiences. This is increasing the division among internet users, with some groups of people using the internet widely and across a range of devices, and others confined to limited use.
- Despite an increase in take-up across demographics, certain factors (age, education, occupation and income) continue to divide users from non-users.
- As people go online and become more familiar with the internet their general online confidence grows. But some people remain offline, or, if online, have not acquired enough skills to build confidence and participate fully.
- The Communications Consumer Panel 2012 research: *Bridging the Gap* (Futuresight) found much to support the issues highlighted in the 2010 review. Of particular note is the requirement for ongoing informal support for people who are less digitally engaged, in particular older people, people in lower socio-economic groups and other groups who may be disadvantaged through a lack of confidence and skills.

[81]Communications Consumer Panel, (May 2010) : *Digital Participation Research Review*
http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation

Section 2

Introduction

About this review

In 2010 the CCP published a *Digital Participation Research Review* which set out the evidence for the *Consumer Framework for Digital Participation*, reflecting citizens' and consumers' views of what they need to get online and get the most from the internet.[82]

The increase in the number of people online over the past two years and significant further developments in technology mean that an update of the *Digital Participation Research Review* is required.

This research update looks at new research since the publication of the CCP's *Digital Participation Research Review* in May 2010. It covers large-scale regular sources including Ofcom's various tracker surveys, ONS output, the Oxford Internet surveys and other independent research.

This report is not designed to replace the previous review but to provide an update of some of the information reported in it. This report should be read alongside the previous review.

This report is divided into the following sections:

- Take-up and use
    - an overview of current statistics about internet take-up and use. This includes an update on the following key consumer groups to match the groups that were interviewed as part of the independent qualitative research project.
        - People who have been online but are now offline (lapsed users)
        - People who use other people to access the internet (proxy users)
        - People with a limited breadth of online use (narrow users)
        - People who are recently online (new users)

      In addition the report looks at any new information on people not yet online (offline).

- What people need to get online and participate
    - an update of any evidence underpinning each element of the framework

[82] In May 2010 The Panel published a review of existing research and new consumer research into people's experiences of getting online and getting the most from the internet to accompany the Panel's Consumer Framework for Digital Participation.
http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation

- Socio-economic differences in take-up and use
    - an update on take-up and use and any evidence regarding the areas of the framework, where relevant.

Section 3

Take-up and use

Take-up and use: adults[83]

By the first quarter of 2012 the number of people who had 'ever' used the internet was 42.16 million, or 83.7% of the adult population. This left an estimated 8.1 million adults in the UK who had never used the internet, or 16.1% of the adult population. This is about 1% lower than 2011 Q4 and 7% lower than 2011 Q1.[84]

There was a decrease of 83,000 adults who had never used the internet, compared with the previous quarter. This is a smaller decrease than the previous quarter: 224,000 adults who had never used the internet between the third and fourth quarters of 2011.

Among 55 to 64 year olds, there were 56,000 fewer non-users by 2012 Q1, compared with 2011 Q4, with the percentage of non-users in this age group decreasing from 18.7% to 18.0%. Among 65-74 year olds there were 53,000 less non-users. However, in this quarter the number of non-users aged 75 and over actually increased by 87,000: 72.5% of this age group claimed never to have used the internet in 2012 Q1.

Internet use is linked to various socio-economic and demographic characteristics, such as age, disability, location and earnings. Adults who were less likely to have used the internet included the over-65s, and those with a disability.[85]

Internet home access continues to increase but there is some evidence that it is levelling off. Eighty per cent of the UK population aged 16+ now have internet access at home, via any device at the end of 2011, up from 70% in 2009. Most of these connections (76%) are broadband, with a further 3% using only their mobile phone for home internet access. Only 1% now has narrowband. Seventy-eight per cent of UK adults have the internet at home and use it at home, so a small proportion, 2% of adults, have access at home but do not use it.[86] Eighty-two per cent of UK adults aged 16+ say they ever use the

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[83]Note: Internet usage is tracked in a number of surveys. While take-up figures may differ slightly between surveys, depending on differences in questioning and/or methodology, figures from the ONS broadly support the findings from Ofcom's regular Technology Tracker survey which is published three times a year. This research review refers both to end 2011 data from the tracking survey for up-to-date figures as well as to data from Quarter 1 2011 published in the *Communications Market Report* which has been analysed in more detail and has larger sample sizes.

[84]ONS Internet Access Quarterly Update 2012 Q1 http://www.ons.gov.uk/ons/rel/rdit2/internet-access-quarterly-update/2012-q1/index.html

[85]http://www.ons.gov.uk/ons/dcp171766_256200.pdf

[86]*Ofcom Technology Tracker Quarter- Main Set. Ist October - 10th December 2011* *http://stakeholders.ofcom.org.uk/binaries/research/statistics/2012jan/Ofcom_Technology_Tracker_Wa3.pdf*QE2. *Do you or does anyone in your household have access to the internet/ Worldwide*

internet anywhere, i.e. including out of the home, an increase of five percentage points on Q1 2010.[87] This suggests that around 4% of adults use the internet outside the home but do not have home access. The recently-published *Media Literacy Audit* found that 79% of adults accessed the internet at home on any device.[88]

While internet growth has continued to rise over the past two years, there is some evidence that growth is levelling off. Ofcom's research on the international communications market supports the hypothesis that there may be a plateau for internet growth and that the last group of non-adopters may be hard to convert. It finds that fixed broadband take-up is slowing across many countries where broadband has reached mass adoption level. [89]

Internet access is increasingly mobile and new types of connected devices are beginning to find audiences. There has been a notable increase in the use of the internet on a mobile device, rising from 20% in 2009 to 40% in 2011.[90] Much of this is due to the rapid increase in use of smartphones and more recently the arrival of tablets. By the end of 2011, 40% of UK adults had a smartphone, up from 27% in the first quarter of the year. Over one in three adults (34%) is now using a mobile phone to access the internet and over one in five (22%) use a mobile phone to go online outside the home.[91]

Six per cent of households claimed to have a tablet computer (e.g. iPad) and 4% claimed to have a smart TV in the last quarter of 2011. These figures are likely to increase.[92]

Web at HOME (via any device, e.g. PC, mobile phone etc)? QE7 (QE9). SHOWCARD Which of these methods does your household use to connect to the internet at home? NB: total broadband including and excluding mobile phone responses rebased on total adult sample for percent of population. *OFCOM NATIONS & REGIONS TRACKER - QUARTER 1 2009. 10th January to 28th February 2009. Q E2 Do you or does anyone in your household have access to the Internet/Worldwide Web at HOME (via any device, e.g. PC, mobile phone etc)?*

[87] http://stakeholders.ofcom.org.uk/binaries/research/statistics/2012jan/Ofcom_Technology_Tracker_Wa3.pdf Ofcom: *Technology Tracker Quarter- Main Set. Ist October – 10th December 2011* and *Technology Tracker Wave 1 2011*: QE2 (as above) and QE3 (IN6). *Do you ever access the internet anywhere other than in your home at all?*

[88] Ofcom: *Adults' Media Use and Attitudes - March 2012* http://http://stakeholders.ofcom.org.uk/market-data-research/media-literacy-pubs/

[89] *Ofcom (December 2011l) International Communications Market Review (ICMR).* http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr11/international/ *Section 5.3*

[90] OxIS Dutton, W.H. and Blank, G. (2011) *Next Generation Users: The Internet in Britain 2011.* Oxford Internet Institute, University of Oxford. Locations of Use (QC1)

[91] *Ofcom Technology Tracker Quarter- Main Set. Ist October – 10th December 2011* QD4 (QD24B). Do you personally use a smartphone? Re-based on total population.

[92] *Ofcom Technology Tracker Quarter- Main Set. Ist October – 10th December 2011. QE1. Does your household have a PC, laptop, netbook or tablet computer QH26 (QH62). Are any of your TV sets "Smart TVs"? These are new types of TV that are connected to the internet and can stream video directly onto your television screen, without the need for a computer, set-top box or games console*

Next-generation users. The Oxford Institute for Internet Studies (Oii) in its OxIS survey has identified a new group of users who are making the most of this growth in portable devices: the next-generation user. These are defined as users who access the internet from multiple locations and devices. OxIS found that this group has been growing swiftly over time and uses the internet much more broadly than people who do not access the internet from multiple locations and devices, classified as first-generation users.

First-generation users account for 40% of adults and next-generation users for 32%. (The remainder are not online, according to this survey). Next-generation users are more likely to be producers of content, to use the internet for entertainment and leisure and to go to the internet first for all kinds of information. First-generation users, on the other hand, focus more on consumption rather than production.[93]

Internet users are spending more time online and over 80% claim to be confident in their internet use. Self-reported weekly hours spent online have risen from 9.9 hours in 2005 to 15.1 in 2011. That said, considerable differences by socio-economic group (SEG) and by age remain. Younger users on average spent longer online than older users. This pattern reflects additional online use at work among younger people and people in higher socio-economic grades[94]. Over eight in ten internet users, 84%, claim to be confident in their internet use.[95]

People are increasingly using the internet at the same time as other media devices. Research by Ofcom has found that, on average, nearly half of people's waking hours (45%) are spent using media and communications services. By multi-tasking, people squeeze more media and communications consumption into this time; an equivalent of 8 hours 48 minutes into 7 hours. [96]

Attachment to mobile phones and the internet is growing. When people are asked which medium they would miss the most if it were taken away, there are clear differences in response by age-group. Overall, 46% of people interviewed in 2011 said they would most miss their TV –up slightly on 2010 (44%), while 17% said they would most miss the internet – more than double the proportion five years ago (8% in 2005) and level with 2010. In 2011 18% say they would most miss their mobile, compared with 12% in 2010. But this masks huge demographic differences; mobile phones and the internet are most popular among younger people.[97]

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[93]Oxii Dutton, W.H. and Blank, G. (2011) *Next Generation Users: The Internet in Britain 2011*
[94]Ofcom: *Adults' Media Use and Attitudes - March 2012*
http://http://stakeholders.ofcom.org.uk/market-data-research/media-literacy-pubs/Q IN6A/ IN6B/ IN6C
[95]*Ofcom*(2012) *UK Adults' Media use and Attitudes Report - March 2012IN12C Overall, how confident are you as an internet user?*
[96]http://stakeholders.ofcom.org.uk/market-data-research/market-data/digital-day/
[97]*Ofcom: Adults' Media Use and Attitudes - March 2012*

Email use remains the most popular use of the internet. The *Adults' Media Use and Attitudes Survey* enables tracking over time as questions are asked regularly. Seventy-nine per cent of internet users use the internet to send and receive emails on a weekly basis. Use of the internet to send or receive email has remained relatively constant since 2005. The next most popular activities are general surfing/browsing the internet (73%) and looking at social networking sites (53%). (For a fuller breakdown please see Section 4 of this research review). Activities which have shown the greatest increase in take-up (not just weekly use) among internet users since 2005 are: [98] finding information about public services (68% in 2011 vs. 49% in 2005), finding information for leisure time (79% vs. 61%) and looking at news websites (67% vs. 51%). Social networking started to be tracked from 2007 and has increased from being an activity done by just over one third of internet users (37%) in 2007 to just under two-thirds of internet users (64%) in 2011.[99]

Despite an increase in take-up across demographics, certain factors (age, education, occupation and income) continue to divide users. Younger people are far more likely to have the internet at home and use the internet than are older people. By the end of 2011 home internet access by age group was:

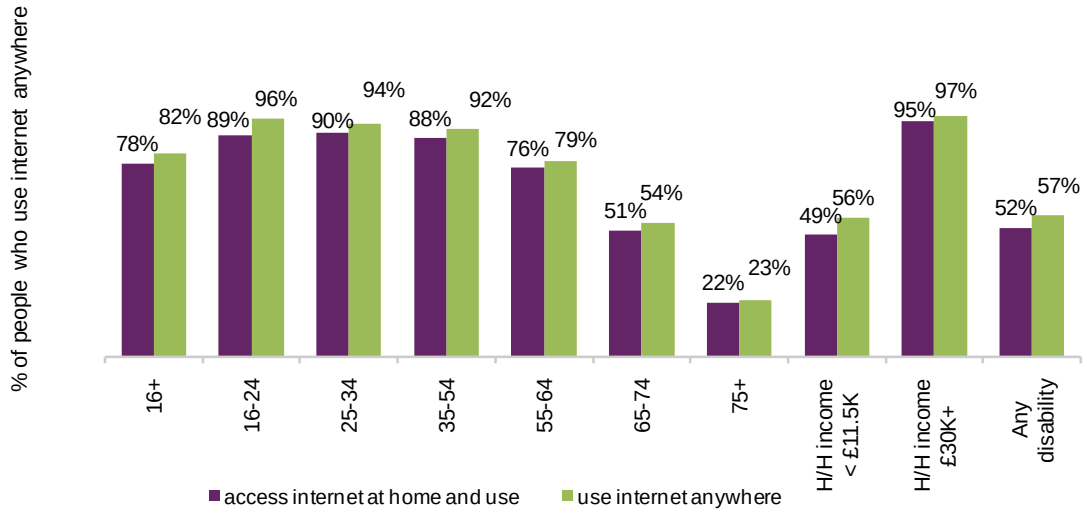
- 91% of 16-24s
- 91% of 25-34s
- 90% of 35-54s
- 80% of 55-64
- 57% of 65-74
- 26% of 75+.

Among those aged 65-74, in Q1 2006 only four in ten had internet access at home (42%), but by the end of 2011, this had risen to over half of this age group (57%). This compares to a quarter (26%) of those aged 75+ who had the internet at home in Q1 2011 (up from 15% in 2006).[100]

As noted earlier, not everybody with home internet uses it and there are some people who use the internet outside the home. The chart below shows the proportion of each demographic who use the internet at all, at home and elsewhere.

[98]Note: this reflects activities where there is tracking data available
[99]*Ofcom Adults' Media Use and Attitudes - March 2012* Figure 41: Individual internet activities ever undertaken: http://stakeholders.ofcom.org.uk/market-data-research/media-literacy/archive/medlitpub/medlitpubrss/adults-media-use-attitudes/
[100]Ofcom Technology Tracker Quarter 3 2011 and *The Communications Market 2011 Figure 1.60*

Figure 1: Internet use anywhere



Source: Ofcom (2012a) Technology Tracker Quarter- Main Set. Ist October – 10th December 2011 Q
QE2. Do you or does anyone in your household have access to the internet/ Worldwide Web at HOME (via any device, e.g. PC, mobile phone etc)? (SINGLE CODE) and QE3 (IN6). SHOWCARD Do you ever access the internet anywhere other than in your home at all? IF YES: Where is that? (MULTI CODE)
Base: 2240

The young, wealthy and well-educated continue to be the most engaged online. The elderly, the retired and those with few or no qualifications tend to be least likely to use the internet, and have the lowest confidence in the technology. Retired people and non- or ex-users are the most fearful of the technology 'breaking' or 'failing' when they need it most.[101]

Literacy is still a barrier for a minority

While the majority of people claim they are confident about their ability to read and write, a small minority, 2% of adults, claim to be not very, or not at all, confident. Among people in the DE socio-economic group this figure stands at 4% with only 75% claiming to be very confident, compared with 87% of all adults.[102] Low literacy levels can be a substantial barrier to people going online.[103]

[101]OxIS Dutton, W.H. and Blank Q 1 and QB1 – agreeing with statement: I fear I might break new technologies, Technologies fail when you need them most
[102]Ofcom Adults' Media Use and Attitudes - March 2012 Figure 41: Individual internet activities ever undertaken: http://stakeholders.ofcom.org.uk/market-data-research/media-literacy/archive/medlitpub/medlitpubrss/adults-media-use-attitudes/C8 which of these options best describes how you feel about your ability to read and write?
[103]*Bridging the Gap* (Futuresight)

People are increasingly confident about using the internet and have fewer concerns than in the past. Safety and privacy skills remain variable

Ofcom's recently published *Adults' Media Use and Attitudes* report found that concerns about media have reduced over time, and confidence online remains high. The belief that online content is regulated has increased.

One in two users describe themselves as very confident internet users, with over eight in ten (84%) saying they are either very or fairly confident.

The survey found that in general safety and privacy skills are varied. There has been a steady increase in the proportion of people saying they would decide whether or not to enter personal details based on "formal" signs such as padlock signs and system messages, with just over half of respondents saying they use such types of formal judgement. This varies considerably by socio-economic group.

There has been little change since 2005 in the extent to which people are happy about giving out various types of personal information online, with about half saying they would give out credit card details, albeit with some reservations. Around one in six(16%) social networking site users are potentially sharing their contact details with people not known to them, and around one in 20 (5%) of all internet users say they are happy for anyone to see various types of personal information online.

People's attitudes towards their online privacy, and their level of skills to protect their personal details, appear mixed. While there is high awareness of website terms and conditions/ privacy statements, only one in four (24%) internet users say they read these thoroughly, with the same proportion (24%) saying they never read them.

The research found that over six in ten internet users bank online or use government websites, and close to eight in ten shop online. Around two-thirds of those who use government websites or bank online say they are happy to enter their personal details, and just over half of people that shop online say they are happy to do so.

Among those who do not undertake these activities online, security concerns do not appear to be a significant barrier to use; lack of interest is more commonly nominated as a reason. However, security concerns are more likely to inhibit banking online than shopping online or using government websites.[104]

[104] *Ofcom: Adults' Media Use and Attitudes - March 2012*

Take up and use: children[105][106]

Over 90% of children have home internet access. There has been continued growth in children's household access to the internet. The *2011 Children's Media Literacy Audit* found that nine in ten (91%) children aged 5-15 live in a household with internet access via a PC/laptop, up from 87% in 2010. Home internet access has increased for children in C1 households (96% vs. 92%) and in DE households (80% vs. 74%) since 2010. However, internet access at home in AB and C1 households is close to universal (98% and 96% respectively).

Children are accessing the internet via a range of devices. While slightly more than eight in ten children (82%) use the internet at home through a PC or laptop, some (17%) go online via a fixed or portable games console/ games player (17%), a mobile phone (14%), a portable media player (7%) or a tablet PC (2%). Use of a mobile phone to go online at home has increased since 2010 among children aged 12-15 (29% vs. 23%) and 8-11 (9% vs. 4%). This is driven by an increase in smartphone ownership since 2010 among 12-15s (41% in 2011 vs. 35% in 2010).[107] Younger children are less likely to own a smartphone, accounting for 12% of 8-11s and 2% of 5-7s. Given the increase in smartphone ownership in the adult population over the past year, as noted previously, it is very likely that uptake among children will increase. Ofcom's *Children's Media Literacy Audit* is due to be published in autumn 2012.

Around one in twenty 5-15s (5%) use the internet only at school; a decrease since 2010 (5% vs. 7% in 2010). One in twelve (8%) of all 5-15s do not use the internet at all, in any location; this has not changed between 2010 and 2011.

Going online is thoroughly embedded in children's lives. These findings are true across Europe, where going online is thoroughly embedded in children's lives across Europe. The EU Kids Online survey [108], published in 2011, also found that internet use is becoming increasingly privatised – used in a bedroom, other private rooms or via a mobile device.

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[105]Ofcom (April 2011) *UK Children's Media Literacy*http://stakeholders.ofcom.org.uk/market-data-research/media-literacy/medlitpub/medlitpubrss/ukchildrensml11/

[106]Ofcom (October 2011) Children and parents: media use and attitudes reporthttp://stakeholders.ofcom.org.uk/market-data-research/media-literacy-pubs/

[107] Research published in Ofcom's 2011 Communications Market Report found that 47% of 12-15s have a Smartphone. Please note that there is a difference in methodologies between the two surveys - online panel versus face-to-face - and the difference is not statistically significant. It is also important to note that in the Communications Market Report, 67% of Smartphone owners said they had purchased it in the last six months which points towards a dynamic market. The Communications Market Report is available from Ofcom's website: http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr11/

[108] Sonia Livingstone and Dr Leslie Haddon (2011) EU Kids Online *http://www2.lse.ac.uk/media@lse/research/EUKidsOnline/EU%20Kids%20II%20(2009-11)/EUKidsOnlineIIReports/Final%20report.pdf*

Children aged 12-15 are now more likely to say they would miss their mobile phone or the internet most. While television continues to be the medium that children aged 5-15 say they would miss the most, this declined between 2010 and 2011 among 8-11s (from 45% to 39%) and 12-15s (from 24% to 18%). Children aged 12-15 were more likely in 2011 to say they would miss their mobile phone (28%) or the internet (25%) than television.

One third of 12-15 year olds (38%) agree that their phone is more important for accessing the internet than any other device, and three-quarters (74%) of teens have used their smartphone for social networking. Almost half (47%) of all teens (aged 12-15) have a smartphone. Teens, in particular, are likely to say they have high levels of 'addiction' to their smartphones, with 60% rating their level of 'addiction' to their phone at seven or higher. Teen girls are more 'addicted' to their phones than boys.[109]

Internet use increases with age. Younger children are most likely to use the internet for games, while older children are most likely to use it for homework or social networking . As found previously, internet use increases as children get older. PC/laptop internet use at home ranges from 65% of 5-7s, 85% of 8-11s to 93% of 12-15s; an increase for this oldest group since 2010 (88%). The estimated weekly volume of internet use at home increases with the age of the child (5.5 hours for 5-7s, 8.0 hours for 8-11s and 14.9 hours for 12-15s). Older children are much more likely than younger children to have PC/laptop internet access in their bedroom (43% of 12-15 year olds compared to 14% of 8-11s and 4% of 5-7s).

Children in AB households are more likely to use the internet at home (93% vs. 82%) compared to all households with children aged 5-15 and children in DE households are less likely to use the internet (72% vs. 82%). This reflects the lower levels of household take-up of the internet in DE households. However, compared to all children aged 5-15, those in AB households spend fewer hours online in a typical week (9.2 hours vs. 10.3 hours) while those in DE households spend more time online (11.4 hours).

Three-quarters of 12-15s with the internet at home have set up a social networking profile. Social networking activity has not increased since 2010: 3% of 5-7s, 28% of 8-11s and 75% of 12-15s have an active profile. Social networking is one of the most popular activities among 12-15s with a smartphone, with 50% going on social networking sites via their phone at least once a week.

There has been little change in the levels of knowledge and understanding about content online. Some 8-11s and 12-15s show evidence of differentiating between the truthfulness of different types of television content and also between different types of online content.

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[109]Ofcom (2011)*The Communications Market 2011* http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr11/

Close to half (45%) of 12-15s who ever use search engines make some type of critical judgement about search engine results, thinking that some of the sites returned will be truthful and some won't be. One in three (33%) believe that information on a website listed by a search engine must be truthful. Both of these measures are unchanged since 2010.

Since 2010, internet users aged 12-15s are more likely to make certain checks when visiting websites new to them, but the overall extent of making any checks is unchanged, at 63%.

The vast majority of children say they feel they know how to stay safe online.

Children aged 8-11 and 12-15 with a social networking profile were asked about specific dislikes relating to social networking. The most common responses were that they didn't like the possibility that people sometimes get bullied on these sites or that strangers may find out information about them.

Take-up and use: Different types of internet users

The internet can be accessed in many different ways by different types of people. This section summarises the information about those groups who either access the internet out of the home, via a proxy, or whose internet use is limited, or who are still offline or offline after having lapsed.

Out-of-home use

Home access remains the primary way to access the internet but, as identified in the 2010 *Digital Participation Research Review*, not everyone without home internet access is a non-user. As noted above, around 4% of adults use the internet outside the home and do not have home access. While accessing the internet at work has remained static over the last four years, at one in four, the proportion using an internet connection in a library, educational institution or at someone else's house has gradually declined since 2008, as more people access the internet in the home.[110]

However, out-of-home internet access still remains important for certain groups of people. Libraries, on mobile devices, and at another person's home tend to be more important for people with lower incomes, whereas work and home access are more common among the higher-income groups.[111]

[110]Ofcom (2011) *The Communications Market 2011 Figure 5.84 Location of Internet Access*
[111]OxIS (2011) Dutton, W.H. and Blank, G. Next Generation Users: The Internet in Britain 2011. P 10

Proxy users

Proxy use remains a very important link to the internet for over two-thirds of people who do not use the internet themselves. Ex-users are more likely than non-users to know someone whom they could ask for help using the internet, at 62% vs. 44%. [112] However, that does not translate into necessarily using a proxy. An estimated 23% of non-users had proxy use of the internet in the past year; that is, they asked someone else to send an email, get information from the internet, or make a purchase from the internet on their behalf.[113] This equates to around 5% of the UK adult population and just under 2.5 million adults. [114]

Non-users

Eighteen per cent of adults don't use the internet anywhere and 20% do not have access at home, as noted above.[115]

The 2010 *Digital Participation Research Review* suggested that some people will probably never use the internet, owing to deeply entrenched anti-internet sentiments and a conviction that the effort involved to get online vastly outweighs any benefit that they might gain from it (Essential Research, 2010).

Further evidence for this is that the majority of people living in a household with no internet say they are not planning to take up the internet in the next 12 months. The proportion of adults saying they don't intend to get internet at home has decreased as access has increased, but in 2011 over 70% of people with no internet connection had no plans to get the internet in the next twelve months.

Most give reasons relating to a lack of interest, as in previous years (78% in both 2011 and 2010), although it is recognised that a respondent may feel more comfortable stating that they are not interested than saying that cost is a barrier. The next most likely reason for not intending to get internet access relates to cost (30% vs. 35% in 2010), followed by reasons relating to ownership / availability (20% vs. 26%); typically that they do not have a computer (18%), with some saying that they do not have a landline telephone (1%). Those who do not intend to get the internet at home then give reasons that relate to knowledge (14% vs. 17%); typically that they don't know how to use a computer (13%).[116]

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[112]OxIS (2011*)* Dutton, W.H. and Blank, G. *Next Generation Users: The Internet in Britain 2011.* Oxford Internet Institute, University of Oxford.
[113]*Ofcom*(2012) *UK Adults' Media use and Attitudes Report - March 2012*
[114] *Ofcom*(2012) *UK Adults' Media use and Attitudes Report - March 2012 and* ONS Annual Population Survey. Oct 2010 -Sep 2011
[115]Ofcom(2012) *Technology Tracker Quarter- Main Set. Ist October – 10th December 2011*
[116]Ofcom: *Adults' Media Use and Attitudes - March 2012*

Lapsed users

According to the Oxford Internet Institute, around 4% of adults are lapsed or 'ex-users'. Ex-users (who have used the internet before) are more likely than non-users (who have never used the Internet) to plan to get access in the next year: 35% of ex-users were planning to get access to the internet in 2011 compared to 10% of non-users. The reasons people give for no longer being online are varied. Cost, access, interest and skills are all important; however, their relative importance varies depending on the situation of the ex-user. For example, for ex-users who are employed, the most important stated reason for non-use is no longer having a computer available. But for retired ex-users the most important reason is lack of interest.

Cost, access and lack of interest in using the internet are all reasons people give for not using the internet. While ex-users are more likely to go back online they are increasingly mentioning that cost is a barrier, while people who are not yet online still need to be convinced of the benefits.

The OxIS survey has found a steady rise in the proportion of ex-users who say the internet is too expensive; it now approaches two-thirds of ex-users (62% in 2011, 50% in 2009, and 35% in 2007).[117] The internet is not only not seen as cost-saving, but actively seen as a cost drain.

Narrow users

Narrow users of the internet are those who have not progressed beyond 'narrow/basic' usage. Narrow users are defined by the Media Literacy Audit as those who carry out 1-6 out of 18 types of online activity, and comprise two in ten (21%) of all internet users.

In terms of demographics, older adults, DE adults and newer users are more likely to be narrow users. Narrow users are considerably less likely, compared to all internet users, to have ever used the internet for banking or paying bills or for downloading software, downloading or listening to music or watching video clips or webcasts. Narrow users are also more likely to stick to 'tried and tested' websites and are less likely to say they visit websites they haven't visited before.

In terms of making judgements about websites, narrow users are more likely not to trust websites to be secure, and are less likely to say they would make a judgement about a website.

As well as doing less online, narrow users are less confident users and tend to have a lower overall volume of use. Just one in four narrow users describe themselves as very confident overall as an internet user, compared to half of all users (25% vs. 52%).

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[117] OxIS (2011)

Just three of the 18 categories of internet use are ever undertaken by around half or more narrow users, compared to 12 categories by all internet users. Seventy-seven per cent of narrow users have used the internet to find out information for personal use compared with 94% of all users, 73% have used email, compared with 92% of all users and 49% have used it for buying or selling, compared with 81% of all internet users. Narrow users are considerably less likely to ever use websites in the categories of banking/ paying bills (20% vs. 63%) or social networking (21% vs. 60%).

Narrow users have a lower overall volume of use (7.1 hours a week) compared to all internet users (15.1 hours).[118]

Newer users

According to Ofcom research, across all UK adult internet users, 8% are new users, who first accessed the internet up to three years ago. Older adults and DE adults are more likely to be newer users (16% of people aged 75 and over are newer users, as are 15% of people in DE socio-economic groups).

There is a large overlap in behaviour with narrow users. Newer users have a lower estimated weekly volume of use compared to established users (10.4 vs. 15.5 hours).Two-thirds of newer users only use the internet at home and not anywhere else, compared to just over one-third of more established users (68% vs. 35%). They also visit fewer websites and have lower confidence than more established users. Just one in five newer users describe themselves as very confident overall as an internet user, compared to nearly six in ten more established users (19% vs. 56%).

[118]Ofcom: *Adults' Media Use and Attitudes - March 2012*

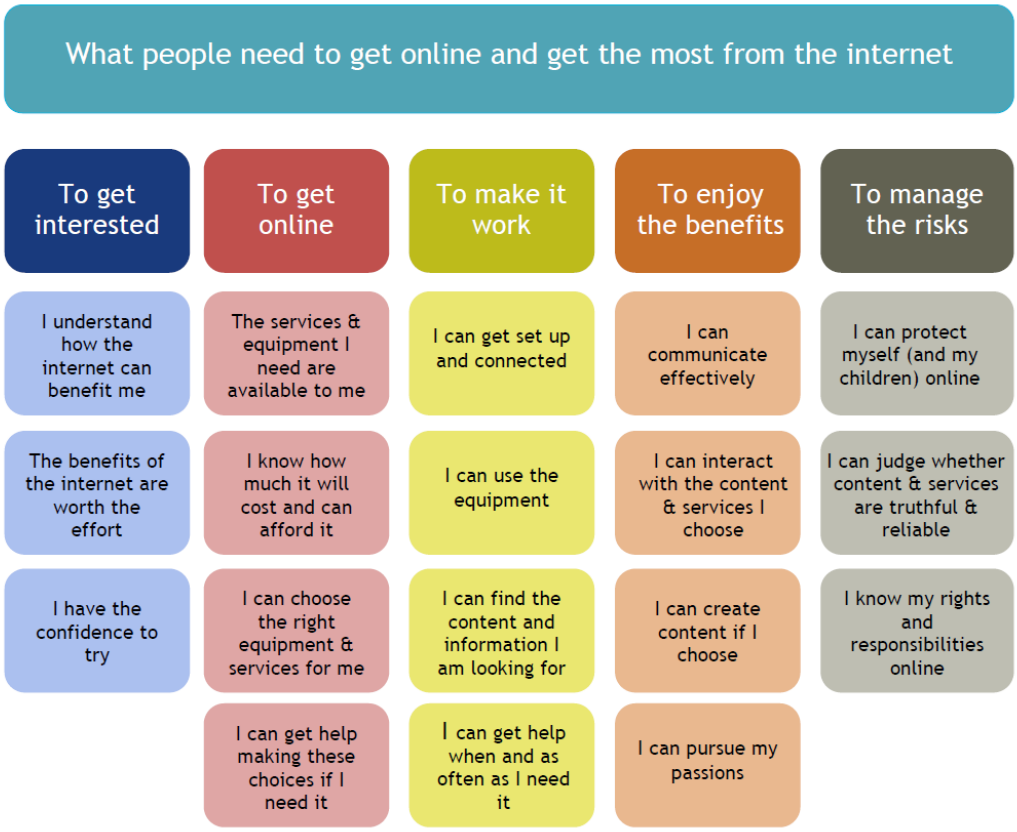
Section 4

What people need to get online and participate

An update on evidence underpinning each element of the framework

The research underpinning the Framework identified five stages in the digital participation journey: to get interested, to get online, to make it work, to enjoy the benefits; and to manage the risks

Figure 2: The Consumer Framework for Digital Participation



To get interested

Please also refer to fuller observations in the 2010 research review[119].

- **I understand how the internet can benefit me**
- **The benefits of the internet are worth the effort**
- **I have the confidence to try**

As the 2010 *Digital Participation Research Review* points out, understanding what the internet can do and how that translates into personal benefits is crucial when deciding to get the internet. The key points identified in the previous report, which drew on qualitative research from 2009, have not significantly changed. The report identified that the features which people value can be broken down into categories of benefits:

- Accessing information
- Communicating
- Online services/transaction
- Entertainment
- Cost savings
- Time savings
- Increased social mobility
- Civic participation and public services

The report also identified that non-users were generally less positive about the benefits and made the point that a lack of knowledge was strongly linked to indifference among non-users. This observation is borne out by the recent work by Futuresight which identified that many people who were less digitally engaged were disinclined to participate because the offline world was perceived to offer more benefits than the online world. This research supported the previous findings that the internet did not fit their lifestyles and that the internet was not for 'people like them'. As observed previously, to get interested, people need to understand the specific improvements that the internet will bring them personally.

[119] Communications Consumer Panel, (May 2010) : *Digital Participation Research Review*http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation

Equally, if people have a family and/or support network then benefits can be demonstrated and communicated. [120] It is estimated that one in seven (15%) UK adults do not have the internet at home and do not intend to get access in the next 12 months. Lack of interest continues to be the most-mentioned reason for not intending to get internet access at home and there is no single online activity that a majority of non-users are interested in, with around one in eight (14%) or fewer expressing an interest in each activity.[121]

Non-users are far less likely to think technology is making things better (37%, compared with 76% of ordinary users and 88% of next-generation users), and far more likely to think that technologies can't be trusted because they fail in times of need (55% of non-users compared to 14% of first-generation users and 8% of next-generation users).[122]

It is not only the offline people who need to be convinced that the benefits outweigh the effort of getting online. Less digitally-engaged consumers are at risk of lapsing or not progressing due to a number of barriers. The complexity of technology and the pull of the offline world are key, but so are other barriers such as lack of time, low literacy levels, low confidence and, crucially, a lack of informal ongoing support from others. [123]

Looking at use of the internet by type of activity sheds more light on perceived benefits. When types of use are grouped into categories it is clear that communication, work/studies/information, social networking, transactions and entertainment are the activities undertaken most frequently overall. However, there are differences by demographic, revealing that different users perceive different benefits. [124] For more detail on activities undertaken by demographic please see Figures 3 and 4.

There are also differences between generations in their motivations for using the internet. Older people in general appear to have a much more functional approach to the internet, using it primarily 'to find out or learn things' and 'for contact with other people'. By contrast, younger people are much more likely to also use the internet for entertainment: for fun', 'to relax' and 'to pass the time'.[125]

As noted earlier, cost is a barrier for many ex-users while lack of interest is the main reason given by non-users for not going online.

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[120] *Bridging the Gap* Futuresight (2012)
[121] Ofcom: *Adults' Media Use and Attitudes* - March 2012
[122] OxIS (2011)
[123] *Bridging the Gap* Futuresight (2012)
[124] Ofcom The Communications Market 2011 Fig 1.67. http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr11/ NB. This is from the Technology Tracker so is a slightly different question from that in the Media Literacy Audit although overall trends are similar.
[125] Ofcom (2011) UK Adults' Media use and Attitudes Report http://stakeholders.ofcom.org.uk/market-data-research/media-literacy/medlitpub/medlitpubrss/adultmedialitreport11/

Lack of confidence is also a barrier to going online and progressing online. This can manifest itself as low self-esteem, lack of empowerment and assertiveness and is sometimes also related to low literacy levels.[126]

While one in two users (52%) describe themselves as very confident internet users, less than half of users aged 45 or over describe themselves this way. Confidence decreases with age: only 31% of people aged over 55 say they are 'very confident' overall as an internet user.[127]

As noted in the previous research review, a lack of confidence can be part of a general approach to life or confined to people's relationship with technology. Technology and the language in which it is described is a significant barrier to people considering going online and, once online, to progressing. [128]

Other research points to the fact that levels of confidence have increased across all age groups and social groups between 2009 and 2010. The biggest increases in confidence came among 45-54s and 55-64s, with a ten percentage point rise in both age groups on the Technology Tracker.[129]

To get online

Please also refer to fuller observations in the 2010 research review.[130]

- **The services and equipment I need are available to me**
- **I know how much it will cost and can afford it**
- **I can choose the right equipment and services for me**
- **I can get help making these choices if I need it**

For a small number of people the availability of services and equipment remains a problem. Amongst people currently offline, not having a computer at home or available was the main reason given for not being online by 7%, with 20% giving it as a factor. Lack of interest and affordability continue to dominate.[131]

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[126] *Bridging the Gap* Futuresight (2012)
[127] Ofcom: Adults' Media Use and Attitudes - March 2012
[128] Futuresight (2012)
[129] Ofcom The Communications Market 2011 Figure 4.24 Confidence as an internet user, by age, gender and SEG IN10D – Overall then, how confident are you as an internet user? (Prompted responses, single coded)
[130] Communications Consumer Panel, (May 2010) : *Digital Participation Research Review*http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation
[131] *Ofcom (2012) UK Adults' Media use and Attitudes Report*

The perceived complexity of technology and the language used to describe it is very off-putting to non-users and less digitally engaged people. Many people who are lapsed or narrow users have a lack of ongoing support while people who have managed to develop often did so because their pre-disposition to learn was bolstered by support. They tended to get support immediately and readily. [132]

To make it work

Please also refer to fuller observations in the 2010 research review.[133]

- I can get set up and connected
- I can use the equipment
- I can find the content and information I am looking for
- I can get help when and as often as I need it

There remains a group of people who are less confident. As identified in the 2010 Research Review[134], the more confident people are, the more functions they use and the more sites they visit. As noted above, older and new users are sometimes less confident and their internet use is narrower as a result.[135]

As identified above, the extent to which people progress depends on the level of support they receive. Digital participation initiatives tend to reach those people who are already pre-disposed to learn, and often for reasons of funding and resource have been focused on getting people online rather than supporting them along the journey. Formal training is seen as off-putting by people who are less digitally engaged. Even though users may have had help to get set up and started off, if their learning is not embedded, their use can stall. The skills acquired in learning how to do one task are not identified as being able to support the users through to other tasks. The loss of a key source of ongoing help can also be a major factor in people lapsing. Developing users, however, have good access to ongoing support.[136]

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[132] *Bridging the Gap* Futuresight (2012)
[133]Communications Consumer Panel, (May 2010) : *Digital Participation Research Review*http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation
[134] Communications Consumer Panel, (May 2010) : *Digital Participation Research Review* page 37
[135]*Ofcom* UK Adults' Media use and Attitudes Report - March 2012
[136]*Bridging the Gap* Futuresight (2012)

To enjoy the benefits

Please also refer to fuller observations in the 2010 research review.[137]

- **I can communicate effectively**
- **I can interact with the content and services I choose**
- **I can create content if I choose**
- **I can pursue my passions**

Communication remains a key benefit of the internet. Eighty-two per cent of internet users communicate using the internet at least once a week. This is unchanged since 2010 (82% vs. 83%). Sending and receiving emails remains the main activity for all age groups; 79% of adult internet users communicate this way weekly, while 75% of people aged over 65 who use the internet also do this weekly. The second most common activity is general surfing and browsing, which is done by 73% of adult users. Although older people do this slightly less, 58% of users over 65 claim to do this weekly. Social networking, which includes using social networking sites and sending or receiving Twitter updates, is done by 54% of adult users; using the internet for work/study is cited by 52% of adult users; and transactions by 48%. These activities skew heavily towards people under 54.

Broadly speaking, younger internet users and people in the AB socio-economic group have a broader weekly internet use. While three-quarters of internet users say they visit at least one or two new websites in a typical week (an increase from around two-thirds in 2009) this still leaves one-quarter of internet users using only tried and tested websites in a typical week, with older users and those in DE groups being more likely to do this.

While around two-thirds of internet users say they feel confident about carrying out 'creative' activities – active content generation – there has been little change since 2007. Fifty-nine per cent of UK users surveyed in 2011 said they had set up a social networking page or profile. This typically involves uploading photos, which explains why 54% of UK internet users say they have uploaded pictures. This masks large age differences: 90% of internet users aged 16-24 have set up their own social networking profile compared with just 19% of people aged over 65. [138]

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[137]Communications Consumer Panel, (May 2010) : *Digital Participation Research Review*http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation

[138]Ofcom UK Adults' Media use and Attitudes Report - March 2012

Figure 3: Individual internet activities carried out at least once a week in 2010 and 2011, and by age in 2011

	2010 Total	2011 Total	16-24	25-34	35-44	45-54	55-64	65+
Sending and receiving emails	79%	79%	78%	80%	81%	76%	79%	75%
General surfing/ browsing the internet	NA	73%	81%↑	77%	71%	72%	66%	58%↓
Looking at social networking sites	45%	53%↑	80%↑	75%↑	49%	45%	21%↓	14%↓
Finding information for your work/ job/ studies	45%	46%	57%↑	49%	49%	50%	32%↓	14%↓
Banking and paying bills online	33%	36%	25%↓	44%	44%↑	33%	36%	22%↓
Looking at news websites	31%	31%	25%	37%	35%	25%	34%	26%
Using online chat rooms or Instant Messaging	30%	30%	50%↑	42%↑	27%	22%↓	16%↓	10%↓
Watch online or download short video clips	20%	26%↑	48%↑	34%↑	22%	20%	12%↓	6%↓
Listen to or download music online	22%	22%	41%↑	28%	20%	14%↓	11%↓	6%↓
Buying and selling things online	17%	20%	20%	23%	23%	16%	15%	13%↓
Finding information for your leisure time including cinema and live music	17%	18%	26%↑	23%	17%	15%	14%	7%↓
Watch online or download TV programmes or films	14%	18%↑	31%↑	24%↑	15%	12%	9%↓	4%↓
Playing games online	15%	16%	22%	20%	15%	18%	8%↓	6%↓
Looking at job opportunities	16%	16%	28%↑	24%↑	12%	11%	10%	0%
Downloading software	11%	13%	15%	18%	13%	8%	11%	3%↓
Making or receiving calls over the internet (e.g. Skype)	8%	11%↑	11%	13%	12%	7%	10%	9%
Listening to radio stations online	15%	11%↓	12%	14%	9%	10%	9%	5%↓
Finding information about public services provided by local or national government	8%	10%	9%	12%	9%	11%	10%	8%
Maintaining a website or blog	10%	10%	19%↑	11%	7%	6%	7%	3%↓
Finding information about health related issues	9%	9%	9%	11%	8%	9%	10%	6%
Finding information for booking holidays	6%	7%	5%	7%	6%	8%	11%	6%
Send or receive Twitter updates	NA	7%	12%↑	7%	8%	5%	4%	1%↓
Complete government processes online	4%	5%	3%	4%	7%	4%	5%	3%
Doing an online course to achieve a qualification	5%	4%	6%	8%	3%	3%	4%	1%↓
Looking at political/ campaign/ issues websites	6%	3%↓	4%	1%	2%	6%	4%	4%
Online gambling	4%	3%	4%	4%	2%	2%	2%	2%
Looking at adult only websites	2%	2%	4%	1%	0%	2%	1%	2%
Visiting dating websites	1%	1%	1%	3%	1%	2%	2%	0%
Sign an online petition	NA	1%	1%	1%	2%	1%	2%	1%
Contact a local councillor or your MP online	NA	1%	1%	1%	2%	0%	2%	2%

IN14/15 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, single coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (1489 in 2010, 1369 in 2011, 216 aged 16-24, 237 aged 25-34, 268 aged 35-44, 183 aged 45-54, 188 aged 55-64, 277 aged 65+) .
Significance testing shows any change between 2010 and 2011 and between any age group and all adults aged 16+.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to October 2011

Figure 4: Individual internet activities carried out at least once a week, by socio-economic group and gender: 2011

	2011 Total	AB	C1	C2	DE	Male	Female
Sending and receiving emails	79%	87% ↑	87% ↑	74%	58% ↓	81%	76%
General surfing/ browsing the internet	73%	76%	75%	73%	65% ↓	73%	72%
Looking at social networking sites	53%	50%	56%	51%	54%	49%	57% ↑
Finding information for your work/ job/ studies	46%	63% ↑	55% ↑	31% ↓	21% ↓	50% ↑	42%
Banking and paying bills online	36%	44% ↑	39%	34%	24% ↓	38%	35%
Looking at news websites	31%	36%	35%	29%	21% ↓	38% ↑	25%
Using online chat rooms or Instant Messaging	30%	31%	34%	24%	29%	31%	30%
Watch online or download short video clips	26%	28%	26%	22%	26%	28%	24%
Listen to or download music online	22%	26%	22%	19%	20%	25%	20%
Buying and selling things online	20%	24%	20%	21%	13%	17%	22%
Finding information for your leisure time including cinema and live music	18%	24% ↑	16%	19%	13%	20%	17%
Watch online or download TV programmes or films	18%	21%	17%	15%	16%	21% ↑	15%
Playing games online	16%	11%	19%	14%	20%	18%	14%
Looking at job opportunities	16%	17%	14%	13%	19%	19% ↑	14%
Downloading software	13%	14%	13%	11%	10%	16% ↑	9%
Making or receiving calls over the internet (e.g. Skype)	11%	16% ↑	10%	10%	4% ↓	12%	9%
Listening to radio stations online	11%	12%	11%	10%	8%	12%	9%
Finding information about public services provided by local or national government	10%	11%	11%	11%	7%	10%	10%
Maintaining a website or blog	10%	9%	10%	9%	9%	10%	9%
Finding information about health related issues	9%	11%	9%	6%	9%	6%	12% ↑
Finding information for booking holidays	7%	10%	7%	6%	5%	7%	7%
Send or receive Twitter updates	7%	8%	9%	3%	6%	8%	6%
Complete government processes online	5%	4%	6%	7%	3%	7% ↑	3%
Doing an online course to achieve a qualification	4%	4%	6%	3%	5%	4%	5%
Looking at political/ campaign/ issues websites	3%	5%	3%	2%	2%	4%	3%
Online gambling	3%	3%	3%	3%	3%	3%	3%
Looking at adult only websites	2%	0%	1%	4%	2%	2%	1%
Visiting dating websites	1%	1%	2%	1%	2%	1%	2%
Sign an online petition	1%	1%	1%	2%	1%	1%	1%
Contact a local councillor or your MP online	1%	1%	1%	2%	0%	1%	1%

IN14/15 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, single coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (1369 in 2011, 354 AB, 448 C1, 264 C2, 303 DE, 678 male, 691 female) . Significance testing shows any difference between any socio-economic group and all adults aged 16+ or between males and females.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to October 2011

To manage the risks

Please also refer to fuller observations in the 2010 research review.[139]

- **I can protect myself (and my children) online**
- **I can judge whether content and services are truthful and reliable**
- **I know my rights and responsibilities online**

Among internet users, there has been a significant decrease in levels of concern since 2005 and confidence among users is growing, as has been noted above.

Ofcom's qualitative longitudinal study, Media Lives, has found that parents are playing a proactive role in regulating their children's online activities, and informal support networks are spreading media literacy skills. Those with most expertise share their knowledge with their family and friends. Often these 'family technicians' (as one participant called herself) are younger than those they are helping – sometimes much younger. As skills and knowledge are acquired, they are passed on. Although some concerns do remain about online safety and security, especially in relation to young people, most participants have grown steadily more confident that they can, for example, shop or bank safely online, so long as they take the right precautions. Positive experiences have built trust and confidence, and word-of-mouth from fellow users has also played an important role in reassuring them about trying new things. On the whole, these informal support networks seem to be working well for cultivating basic 'access' skills, such as how to perform specific tasks safely online.[140]

While levels of comfort/confidence about being online are high, and levels of concern relatively low, people's skills and strategies in this area are variable. There has been little change since 2005 in the extent to which people are happy about giving out various types of personal information online, with about half saying they would give out credit card details, albeit with some reservations. There has been a steady increase in the proportion of people saying they would decide whether or not to enter such details based on 'formal' signs such as padlock signs and system messages. This varies considerably by socio-economic group.[141]

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[139]Communications Consumer Panel, (May 2010) : *Digital Participation Research Review*http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation

[140]Ofcom : October 2011 *Media Lives – Research Overview 2005-2010)*

[141]Ofcom UK Adults' Media use and Attitudes Report - March 2012

Section 5

Socio-demographic differences in internet take-up and use

The 2010 research review identified that different groups of people need different things to help them get online and get the most from the Internet. It examined take-up and use among a number of vulnerable groups which might be in need of more support. It also summarised any evidence about the extent to which they possess the skills and attributes identified in the framework. This section updates any information or evidence for these groups. The groups are:

- older people (65 and over);
- young people (16-24);
- parents;
- disabled people;
- people on low incomes; and
- people in rural areas.

As noted in the previous review, the analysis is not comprehensive for a variety of reasons, and people can also fall into a range of different groups, such as over 65 and low income.

Having reviewed the latest data the following observations can be made:
Please also refer to fuller observations in the 2010 research review.[142]

Overview – socio-demographics

As noted earlier in Section 3 of this report, despite an increase in take-up across demographics, certain factors (age, education, occupation and income) continue to divide users.

Take-up and use remains highest among younger, degree-educated, high income, AB consumers. Conversely, the groups with lowest levels of take-up remain:[143]

- Older people, particularly those over 75

[142]Communications Consumer Panel, (May 2010) : *Digital Participation Research Review*http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation
[143]Ofcom 2012, ONS 2011 and Oxis 2011

- Low-income consumers, particularly those with a household income below £11,500 a year
- People in DE socio-economic groups
- People with a visual, hearing or mobility impairment
- People with no formal qualifications
- The unemployed

Many people not online share many of the above characteristics.

Older people (65 and over)

Take-up and use

Older people remain the least likely to use the internet and use falls off steeply with age. By the end of 2011, while just under four in ten (39%) of people aged 65+ claimed to use the internet somewhere on some device, this drops steeply with age. While over half of people aged 65-74 are internet users (54%), the figure drops to under a quarter (23%) of older people.[144]

When looking at the broadest definition of internet exposure, i.e. 'ever used' the internet, the difference between younger and older groups remains pronounced: 73% of people aged 75 and over and 39% of 65 – 74 year olds had never used the internet by Q1 2012, compared to 1% of 16-24 year olds. However, there was a drop of 55,000 among those aged 75 and over who had never used the internet between the third and fourth quarters of 2011, which suggests some growth in this demographic.[145] By 2012 Q1, the number of non-users aged 75 and over actually increased by 87,000: 72.5% of this age group claimed never to have used the internet in 2012 Q1.

There is evidence that some older people have the internet at home but do not use it; 56% of people aged over 55 have access at home but 4% of this age group do not use it.[146]

Older internet users (16% of those aged over 75) and those in the DE socio-economic group (15%) are more likely to be newer internet users, compared to all internet users (8%).

Just under 90% of people aged 65+ who were offline said they were not likely to go online in next 12 months.[147]

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[144]Ofcom Technology Tracker Quarter- Subset. Ist October – 10th December 2011http://stakeholders.ofcom.org.uk/market-data-research/statistics/
[145] ONS (2011) *Internet Access Quarterly Update 2011 Q4*
[146]Ofcom Technology Tracker Quarter- Main set. Ist October – 10th December 2011

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

Please also refer to fuller observations in the 2010 research review.[148]

To get interested

For most over-65s without internet access, the main reason is a lack of interest; 31% said that the main reason for not having internet access was that they had no need for it, with 24% saying they were too old to use the internet and 17% saying they did not want a computer. A significant minority (15%) said that their main reason was that they did not know how to use the internet or a computer, and 3% said that it was too expensive.[149]

Older internet users aged 65-74 and aged 75 and over have a lower weekly volume of use compared to all internet users (7.4 hours for 65-74 and 6.9 hours for those aged 75 and over compared to 15.1 hours for all adults).[150]

To get online and make it work

Older people have the most experience of traditional, offline methods of interacting and transacting with the outside world, and habits and preferences for traditional channels are often deeply entrenched. Many of these people are not motivated to seek help to do something online that they consider they can do more easily (and often more quickly) offline. A lack of experience online and awareness of the possibilities compounds this approach. Many older people cannot see a compelling, tangible benefit to investing their time, effort and money in getting access, learning to use a computer and developing new habits.

Older people can feel that the internet is for younger people and not for them, and may not understand the language that is used. It is a language that many hear their grandchildren using. Many feel that they need to learn a new language before they can learn to use a computer.[151]

The accessibility of equipment is also a significant barrier for many older people who encounter problems with small font sizes or readability issues on websites, or equipment that requires a high level of dexterity. These people are likely to need assistance to

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[147]Ofcom UK Adults' Media use and Attitudes Report - March 2012
[148]Communications Consumer Panel, (May 2010) : *Digital Participation Research Review*http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation
[149]Ofcom (2011) Nations and Regions Tracker – Quarter 1 Subset. 4th January to 28th February 2011
[150]Ofcom UK Adults' Media use and Attitudes Report - March 2012
[151]Bridging the Gap Futuresight (2012)

locate, afford and learn to use accessible equipment. Two-thirds of internet users aged over-75 claim to have difficulty using their PC.[152]

Many older people have low confidence in their ability to use the equipment and are fearful of technology 'breaking' or 'failing' when they need it most.[153] Users aged 65 and over are three times more likely than all internet users to describe themselves as not confident (24% vs. 8%).[154]

To enjoy the benefits and manage the risks

Generally, older users undertake fewer activities online. Among users aged 65-74, 46% are narrow users compared with 17% of all adults, and 50% of users aged 75 and over. The main activity done by users aged 65 and over is sending and receiving emails, which is undertaken by 75% on a weekly basis. Fifty-eight per cent surf or browse the internet. After that, looking at news websites is a weekly activity for 26%, and banking and paying bills online is a weekly activity for 22%.

Forty per cent of people aged 65+ say they are confident using the internet to do creative things, like making blogs, sharing photos online, or uploading short videos to the internet. This compares with 69% of all adults. Twenty-five per cent claim to have uploaded photos to a website, compared with 54% of adults; 19% had set up a social networking page and 11% had commented on somebody's blog.[155]

Young people (16-24)

Take-up and use

Virtually all 16-24 year olds have used the internet.[156] The vast majority (89%) of young people use the internet at home and a further 7% use it elsewhere, with 96% claiming to use the internet anywhere. [157] They are confident online, and are more likely to use the internet for a range of communication, entertainment and creative activities.

Internet users aged 16-24 have a higher weekly volume of use compared to all internet users in 2011 (19.6 vs. 15.1 hours).[158]

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[152]*Ofcom (December 2011*) Consumer Experience: Ofcom's annual report into the consumer experience of the fixed and mobile, internet and digital broadcasting markets http://stakeholders.ofcom.org.uk/binaries/research/statistics/2012jan/Ofcom_Technology_Tracker_Wa3.pdf
[153]OxIS 2011
[154]Ofcom UK Adults' *Media use and Attitudes Report* - March 2012
[155]Ofcom *UK Adults' Media use and Attitudes Report*
[156] ONS (2011) Internet Access Quarterly Update 2011 Q4
[157]Ofcom (2012) Technology Tracker Quarter- Main Set. Ist October – 10th December 2011
[158]Ofcom UK Adults' Media use and Attitudes Report

The internet and mobile phones are the key media for this group. Around one in seven 16-24 year olds have a smartphone.[159] When people are asked which medium they would miss the most if it were taken away, 40% of 16-24s choose their mobile phone (40%), an increase of 12% versus 2010 for this age group, meaning mobile phones are now the most-valued medium for this age group.

Use of mobiles to go online is increasing substantially; 71% of mobile phone users aged 16-24 use their phone to go online, compared with 41% of adult mobile phone users.

Young people are also broader users of the internet than many older people. Internet users aged 16-24 are more likely than all internet users to use the internet at least weekly for five of the ten types of use: social networking (82% vs. 54%), general surfing /browsing (81% vs. 73%), work/ studies information (67% vs. 52%), entertainment (65% vs. 44%) and leisure information (29% vs. 21%).

Younger users, aged between 16 and 34, are more likely than all users to say they are very confident in using the internet to do creative things (71% for 16-24s, 54% for 25-34s vs. 44% for all). [160]

A small proportion of 16-24 year olds remain offline. Only 1% of 16-24 year olds have never used the internet[161] and around 4% do not use the internet anywhere.[162]

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

Please also refer to fuller observations in the 2010 research review.[163]

To manage the risks

Compared to all adult internet users, 16-24s are less likely to be concerned about offensive /illegal content (19% vs. 33%) or about risks to others/ society (9% vs. 14%).

Younger people are less likely to be concerned about their privacy, and less likely to take protective steps than older adults. For example, while 48% of respondents say that they would not want anyone to see information about how they are feeling about work/college, this decreases to 21% of 16-24s, with 13% saying they would be happy for anyone to see this information, compared to 6% across all internet users.

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[159]Ofcom Technology Tracker Quarter-.Ist October – 10th December 2011 and Ofcom *UK Adults' Media use and Attitudes Report*
[160]Ofcom *UK Adults' Media use and Attitudes Report*
[161]ONS 2012 ONS (2011) *Internet Access Quarterly Update 2011 Q4*
[162]Ofcom Technology Tracker Quarter. Ist October – 10th December 2011
[163]Communications Consumer Panel, (May 2010) : *Digital Participation Research Review*http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation

16-24s are more likely than all adults to share photographs with people that may not be known to them (38% vs. 30%).[164]

Parents

Take-up and use

Internet take-up is highest among 25-34s (88%) and 35-54s (87%). This is related to a strong correlation between internet access and having children in the household – across the UK as a whole, 91% of households with children have internet access, compared to 66% of households without children.

Overall, parents are more likely to have the internet than are UK adults as a whole. Those without the internet generally recognise its potential benefits and think that it would bring advantages to their children.[165]

What parents need to get online and get the most from the internet

Please also refer to fuller observations in the 2010 research review.[166]

To manage the risks[167]

Most parents of 5-15s trust their child to use the internet safely (81%), feel that the benefits of the internet outweigh the risks (65%), and say that their child has been taught at school how to use the internet safely (79%). However around half of parents (49%) say their child knows more about the internet than they do. Parents of 5-15s are more likely to be concerned about television content (31%) than internet (23%), mobile phone (16%), games (19%) and radio (5%) content.

Parents have relatively low levels of concern about different aspects of their child's internet use; with less than one-third saying they are very or fairly concerned about their child giving out personal details to inappropriate people (28%), being bullied online/ cyberbullying (27%), who their child is in contact with online (24%), the content on the

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[164] Ofcom *UK Adults' Media use and Attitudes Report*
[165] Communications Consumer Panel, (May 2010) : *Digital Participation Research Review* http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation
[166] Communications Consumer Panel, (May 2010) : *Digital Participation Research Review* http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation
[167] Ofcom (2011) *Children and parents: media use and attitudes report* http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/oct2011/Children_and_parents.pdf

websites their child visits (23%), or any illegal downloading (14%). Parents of 12-15s have lower levels of concerns across several of these aspects than they did in 2010.
Most parents have rules in place for each medium with rules more likely to be in place for 5-7s and 8-11s for internet and gaming, and more likely to be in place for 8-11s than for 12-15s for mobile phones. Among parents whose child has a mobile phone that can be used to go online, one in three (31%) say they have limited access to the internet to exclude websites aimed at those aged 18 or over.

There has been no change since 2010 in the incidence of internet controls or filtering software being in place, accounting for four in ten (39%) households where a child aged 5-15 uses the internet at home. However, since 2008 there has been a decline in the incidence of controls/filters.

Over half (54%) of parents of 5-15s say they have rules about the internet related to active supervision, with parents of 5-7s (63%) and 8-11s (61%) being more likely to do so than parents of 12-15s (42%). This has increased since 2010.

Four in five parents of 5-15s say they have spoken with their child about staying safe online (83%) and a similar proportion say they feel they know enough about how to help their child stay safe online (82%). Nine in ten children aged 8-15 say they have been given information about staying safe online.

One in four parents (27%) of children who use the internet at home use a combination of any of the 'technical' parental controls, and have rules relating to supervising their child's internet use and say they have talked to their child about staying safe online. One in twenty (5%) do none of these things, and a further 15% have only talked to their child about staying safe.

Disabled people

Take-up and use

By 2012 Q1, there were just over 4 million disabled adults who had never used the internet. This represents 34.6% of those who are disabled and just under half of the 8.1 million who had never used the internet. Of those adults who reported no disability, 10.9% had never used the internet.[168]

By the end of 2011, 56% of disabled people had internet access at home and 57% had used it anywhere. [169]

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[168]ONS (2011) *Internet Access Quarterly Update 2011 Q4*
[169] Ofcom Technology Tracker Quarter. Ist October – 10th December 2011

As identified in the previous research review, disabled people may be particularly likely to benefit from using the internet. However, they are less likely than the general population to have access to the internet at home and there is relatively little research into what disabled people themselves see as the benefits of and barriers to digital participation.

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

Please also refer to fuller observations in the 2010 research review.[170]

Many of the issues that apply to older people also apply to people with some disabilities as there is a strong overlap between the groups.

Low income adults and adults in lower socio-economic grades

Take-up and use

People on low incomes are less likely to have the internet at home and less likely to have exposure to the internet outside the home than people on higher incomes. Of those adults whose gross income was less than £11,500 a year, only 49% had home internet access and 56% had access anywhere, compared with 78% and 82% for adults.

Looking at socio-economic grades, home take-up and use is 62% for people in DE socio-economic groups, compared to 92% of AB households.[171]

What people on low incomes need to get online and get the most from the internet

Please also refer to fuller observations in the 2010 research review.[172]

Lack of interest was again the most common reason, with 25% saying they had no need for the internet. Cost is also a main concern for some of these households, with 17% saying that their main reason for not having an internet connection was that the service, set-up, or computer was too expensive and 16% saying they did not want a computer.[173]

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[170]Communications Consumer Panel, (May 2010) : *Digital Participation Research Review*http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation
[171]*Ofcom* Technology Tracker Quarter- Ist October – 10th December 2011
[172]Communications Consumer Panel, (May 2010) : *Digital Participation Research Review*http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation
[173]Ofcom (2011) Technology Tracker – Quarter 1. 4th January to 28th February 2011

People in homes classified as falling into lower socio-economic grades are more likely to be narrow internet users; 38% of people in DE households with home internet access are narrow users, compared with 21% of adults.

Many people on low incomes are unsure what equipment they will need to get online. People on low incomes are also more likely to lack confidence with using technology and will need ongoing support to help them setup and use the equipment.

People in rural areas

Take-up

73% of adults living in rural areas have home internet access and 77% access it anywhere, compared with 79% of adults in urban areas having home access and 83% using it anywhere.[174]

For details on what people in rural areas need to get online and get the most from the internet please refer to fuller observations in the 2010 research review.[175]

[174]Ofcom *Technology Tracker Quarter- Ist October – 10th December 2011*
[175]Communications Consumer Panel, (May 2010) : *Digital Participation Research Review*http://www.communicationsconsumerpanel.org.uk/smartweb/research/digital-participation

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