Digital Inclusion APPG
3rd State of the Nation Report

October 2024

Digital Inclusion | appg

Foreword from Digital Inclusion APPG Officer, Lord Clement-Jones

Today, 4 in 10 households with children do not meet the Minimum Digital Living Standard and 1 in 4 households with children have parents missing the critical skills for understanding and managing digital risk. Yet, we live in a world where that digital risk is very real with the propensity for young people to be exposed to online harm.

Over the course of the last year, the APPG has discussed how we tackle these issues head on, as barriers continue to prevail. Indeed, 22% of the population do not have the digital skills needed for everyday life in the UK and by 2030 it is predicted that 4.5m people will remain digitally disengaged.

Though we have seen good progress be made in recent years, there is still much further to go. The APPG has proudly been at the forefront of pioneering change and as we approach a new year, we will continue to act as a voice for those who are digital excluded.

In our last State of the Nation report, we stated that "eradicating data poverty should be a core task for the new Department for Science, Innovation and Technology" with a call for a "minister from that department appointed to chair a cross-departmental task force".

We can therefore celebrate the establishment of the cross-ministerial working group under the former Minister, which we were pleased to hear about at the last session of the APPG before the general election was announced. We hope this work continues now that there has been the election of a new Government.

We also welcome progress made on expanding digital skills, connectivity and accessibility. For example, we know that the former Government was working to design inclusion pathways which would benefit all users by ensuring all public sector websites are accessible on public devices and well-sign posted. Meanwhile, we also know there has been work with Ofcom to increase the number of social tariffs available to consumers.

Despite this progress there is a strong feeling that regional needs are largely overlooked despite local authorities gaining more power, for example over adult education budgets and with programmes which map digital skills provision with local needs. With greater devolution promised, this should be central to our thinking.

This year has been all change for the APPG, with our co-chairs Julie Elliott and Matt Warman leaving the House of Commons. We wish to pay tribute to them – and indeed all of our members who are no longer parliamentarians or who are no longer able to participate - for their commitment to this issue. We'd also like to pay special tribute to our former Co-Chair Darren Jones, who has left the group in the last year since his appointment as (Shadow) Chief Secretary to the Treasury. He was instrumental in bringing together the APPG and we look forward to seeing him pioneering digital inclusion initiatives in Government.

As the longest serving Officer of the Group I'd like to welcome the new members of the APPG and hope to build on our former members' legacies, helping to shape a digitally inclusive United Kingdom where everyone is equipped with the requisite skills and knowledge.

Lord Clement-Jones,
Digital Inclusion APPG Officer

Introduction

13-19 million

people aged 16+ in the million people aged 16+ in the UK are estimated to be digitally excluded in some way – whether that be a lack of access, devices, skills or connectivity.[1]
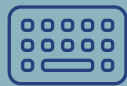
3.7 million

households with children do not meet the Minimum Digital Living Standard. This is 4 in 10 households with children in the UK today.[2]

£13.7bn

The potential positive externalities digital inclusion could have on jobs, housing and skills could total £13.7bn of economic benefit.[3]

16%

of adults in the UK lack the most basic 'foundation-level' digital skills.[4]

£8.5 million

adults in the UK lack the most basic 'foundation-level' digital skills.[5]

Progress since last year's report

In the year since the last Digital Inclusion APPG (then Data Poverty APPG) State of the Nation Report was launched, it has become increasingly evident how digital inclusion underpins policy objectives from all parties and across all sectors.

It has also moved up the agenda for all three major parties.

As Minister for Data Protection and Telecoms, Sir Chris Bryant MP told a Connected Britain conference in September 2024:

"Tackling digital inclusion is a key priority for this government. We want to take everyone with us - because if people are excluded by geography, age, financial status or lack of skills, that is a problem for the whole of society - and for you."[6]

Or, in the words of Shadow Minister for Science, Innovation and Technology, Saqib Bhatti MP, speaking in his previous brief as Minister for Tech and the Digital Economy:

"The Government have been absolutely clear that no one should be left behind in the digital age. Digital inclusion is a cross-cutting issue spanning many different areas."

The Liberal Democrat Manifesto meanwhile, called for a UK-wide target for digital literacy – a key component of digital inclusion.[7]

Last year's Data Poverty APPG State of the Nation Report looked at several sectors most affected by the issue, namely healthcare, education, financial services and access to the labour market. It found in each that the UK was being held back both socially and economically by inequitable access to the internet. In total, APPG partner Good Things Foundation estimated the latter's cost to the economy was as high as £13.7bn.

To remedy this divide, the APPG recommended 8 steps that the Government might take to improve digital and data access in the UK:

1. Make addressing data and digital poverty a core task of the new Department for Science, Innovation and Technology

2. Create a Digital and Social inclusion Fund

3. Develop a national digital inclusion forum with Ofcom

4. Create a 'one-stop shop' digital inclusion support service for consumers, charities, and government agencies.

5. Easier access to social tariffs and data voucher schemes for those on eligible benefits.

6. Increased provision of internet connectivity in public spaces.

7. A digital 'right-of-way' to public services and other essential services provided through the private sector.

8. Expand the number of zero-rated websites

Of these, progress was made in the last government through DSIT founding the cross-Whitehall ministerial group for digital inclusion. Social tariff numbers have continued to rise, with Ofcom's latest figures reporting 380,000 households are taking advantage of the deal,[9] although research from USwitch shows awareness is still low, with two-thirds of financially vulnerable households still unaware that low-income broadband tariffs exist.[9] A Private Member's Bill seeking to make zero-rating of government websites mandatory was curtailed by the calling of a general election and the dissolution of parliament.

Now, the Labour government has called for fresh impetus and collaboration between government and industry, and has raised concerns that the last official digital inclusion strategy was published a decade ago in 2014.[10]

The aims of this year's report

Underpinning all the recommendations of both this and last year's Digital Inclusion APPG reports is a recognition that two things need to happen to ensure the UK's digital divide is closed.

First, top-down leadership is required from the Government to first convene, then co-design and finally implement digital inclusion solutions in the UK.

Second, and stemming from this, the current patchwork of private, third-sector and regional solutions that currently make up the majority of the UK's digital inclusion support needs centralised co-ordination to make it more accessible for end users – many of whom will be time and resource poor.

While the previous Government made advances in coordinating different Departmental responses to digital inclusion - especially by founding the cross-Whitehall ministerial group for digital inclusion and continuing the work of the Digital Skills Council - it chose not to update its 2014 Digital Inclusion Strategy.[11]

The new Labour government's rhetoric around digital inclusion has been strongly encouraging, though both its and the Conservative's election manifestos were light on digital inclusion solutions. Labour focussed on data coverage – pledging full gigabit and national 5G coverage by 2030, AI regulation, and digital skills as part of a wider commitment to 'ensur[ing] every child can develop essential digital, speaking, and creative skills.'[12]

The Conservatives meanwhile only committed to 'Invest in new technology to achieve our ambitious broadband targets for hard-to-reach areas' – an important aim but one that in silo negates the numerous other critical issues forming the UK's digital divide.[13]

To build on the political foundations and pledges already in place, the Digital Inclusion APPG has therefore used its expanded remit this year to examine what a long-term settlement for digital inclusion from Government, and the creation of improved digital inclusion pathways for end users, might look like in practice.

By looking at digital inclusion from these twin angles, the Group aimed to provide an encompassing view of what a coordinated response to digital exclusion could be.

To this end, the rest of this year's report sets out some of the suggested solutions to these challenges that have been set out by the Parliamentarians, industry experts, third sector leaders, regional and local authorities, and academics who have contributed to the Group's meetings this year.

It then goes on to look deeper at some of the ongoing initiatives tackling digital exclusion from across the UK, and concludes with a series of updated recommendations drawn from the Group's work over the past year – to support parliamentarians from all parties in advancing the cause of digital inclusion in the UK.

Section One:
The Changing Digital Inclusion Landscape

Developments in the Causes of Digital Exclusion

Similarly to last year, one of the most significant causes of digital exclusion remains affordability.[14] Despite inflation reducing overall in the last twelve months, the key economic drivers of digital exclusion remain more pertinent and accentuated than ever. As the cost-of-living crisis continued, buying new technology and 'being online' were increasingly seen as luxuries and are often cited as the first thing households cut when budgets get slashed over time.

There are some signs of these concerns starting to abate. Ofcom's Community Affordability Tracker revealed 24% of UK households struggled to afford their communication services in July 2024, a decrease compared to April 2024. They found that concerns about broadband affordability peaked at 10% of consumers during the height of the inflationary period, and has now fallen to 8%. Meanwhile, only 7% of mobile customers and 6% of broadband customers stated they had affordability issues in the report.[15]

Despite this, the long-term results of the cost-of-living crisis have significantly exacerbated data poverty and digital exclusion in the UK. According to a Good Things Foundation Report, 2.4 million of the poorest households can't afford their mobile phone contract.[16] Meanwhile, those who are unemployed are 2-3 times as likely to be in digital poverty than the employed, according to the Digital Poverty Alliance.[17]

This increasing financial squeeze is no more starkly seen than with recent Artificial Intelligence (AI) innovations, which often bare a considerable price. For example, initial estimates by Jisc's national centre for AI (NCAI) have found that if a student were to subscribe to a full suite of popular generative AI tools and education plug-ins, it could cost them around £1,000 a year, pushing generative AI out of reach for many.[18] This divide would be exacerbated by it sitting on top of paying for essentials such as devices.

Online access issues continue to spring from low rates of digital literacy, confidence and skills. The rapid pace of technological innovation is not being met by requisite investment in skills provision across the board. According to the Good Things Foundation, around 8.5m adults lack the most basic 'foundation-level' digital skills,[19] while 3.7 million households with children do not meet the so-called Minimum Digital Living Standard.[20] This is equivalent to 4 in 10 households with dependant-age children in the UK today.

On the teaching side, educators are not being equipped well-enough with the adequate qualifications or knowledge to deliver lessons that encourage digital confidence and competence. A recent survey found that 24% of teachers felt their lack of online skills was a barrier to teaching effectively.[21]

Additionally, there remains no requirement in the QTS (Qualified Teacher Status) to be digitally competent and confident.[22]

With the rise of AI innovations like ChatGPT in the last year, people's confidence to deal with new and rapidly evolving online tools is not keeping pace with the rate of technological innovation. People routinely feel that AI innovations will take their (often low skilled, low wage) jobs and are thus reticent to engage with them in a meaningful way.[23] Government analysis found that only a small proportion of adults with very low digital familiarity think AI will have a positive impact on society. Most of those who are aware of AI associate it either a negative (38%) or neutral (42%) societal impact.[24]

Some people have become less digitally engaged over the past year. According to Ofcom, of the 7% of the population who are digitally excluded, 66% willingly choose not to be connected – indicating a robust apathy emerging towards technological development.[25]

This apathy has been accentuated by the fact that digital inclusion support is far too complex to access and awareness is low. Currently, individual departments use their own siloed programmes to reduce exclusion and gain little subsequent pick up or interest. The Department for Education's own data suggest that this isn't working, as in 2023 there were 1.5 million unemployed people seeking work, yet only 17,510 total people (including those seeking work) starting an EDS qualification.[26]

In the UK, the largest digitally excluded group are older people with more than 1 in 3 over 65's (4.7million people) lacking the basic skills to use the internet successfully. Despite the increase in older people going online over recent years, around 1 in 6 of people aged 65 and over, equivalent to 2.3 million people, can't confidently access the internet.[27] More broadly, around 4% of the total population cannot or do not connect to Wi-Fi.[28]

However, the relationship between online inclusion and age is not simple. Partially down to cost issues, younger adults – particularly students - are more likely to be impacted by exclusion than middle aged adults and it is estimated that women are 14-22% more likely to be in digital poverty than men.[29]

Developments in the Impacts of Digital Exclusion

13-19 million adults across the United Kingdom experience a form of digital poverty, such as low skills and motivation or a lack of devices or connection..[30] Close to 1 in 5 children grow up in a household without a suitable device to access to the internet, exacerbating health and educational inequalities, and creating a cycle of multiple exclusions.[31]

Over the past year, despite the former Government's launch of a cross-Departmental working group to tackle digital exclusion, there has still been no marked improvement across a number of areas, where the impacts of digital exclusion continue to prevent access to healthcare, justice and more. Therefore, in order for the subsequent benefits of digitisation to be felt, there must be a pronounced effort to improve peoples' digital skills and access to ensure the economic and social benefits.

Primarily, people earning different incomes still spend similar amounts on telecoms services. As such, those on lower incomes are paying a higher proportion of their income on these services. Indeed, for those in receipt of Universal Credit, Ofcom has estimated that a £27 per month broadband contract would cost a claimant 8.3% of their disposable income, although social tariffs are available at cheaper prices for these consumers.[32] Meanwhile, 92% of jobs are advertised online resulting in the exclusion of those without the digital skills and access from the labour market.[33]

Previously, it has been estimated that the elimination of digital poverty would see between 7 and 9 million people receive increased personal finances.[34] Whilst research by FutureDotNow, PwC and Lloyds Bank has also explored the economic case for closing the digital skills gap suggesting a potential £3.2 billion uplift to the UK economy through digital upskilling.[35] Additionally, Good Things Foundation's research points to the £1.4 billion in efficiency savings for Government, if digital skills and inclusion are invested into.[36]

Considering that, the most recent report of the House of Lords Communications and Digital Committee on digital exclusion explained that "The economic case for tackling digital exclusion is clear: it would improve productivity, support economic growth and alleviate pressure on some public services. Yet the Government does not appear to have conducted a single assessment of the economic impacts of digital exclusion in recent years."[37] Research continues to highlight the benefits digital inclusion brings, implying the disadvantages digital exclusion creates.

The impact digital exclusion has on access to healthcare cannot also be understated. Those without the access to devices and data, accessibility and ease of using technology, and the skills and capabilities are less likely to receive adequate healthcare

At an event earlier this year, the Digital Inclusion APPG heard how there is a £17bn skills premium if the digital skills potential of the population was realised.[38] Indeed, 25,000 lives could be saved if the digital skills divide was closed as it could vastly help older people better understand their health literacy. Last year, the King's Fund's research showed that close to 30% of people who are offline - with no online access or use - find the NHS to be one of the most difficult organisations to interact with,[39] risking blocking access to healthcare. Though this disproportionately impacts older people, evidence suggests this continues to effect other demographic groups. For example, among those seeking asylum in England, there is a perception that digital access is essential for access health information and healthcare, yet many were prohibited from doing so because of insufficiently up-to-date devices and invalid identity documents.[40]

Meanwhile, despite a widespread acceptance that technological understanding is central to education, with it being claimed that "learning facilitated and supported by digital technologies, is seen as an essential part of formal education", since the pandemic where the digital divide widened, digital exclusion continues to have detrimental impacts on education and schooling.[41] At the end of 2023, exam boards called on the government to make sure schools have the digital access and guidance they need for online GCSE exams.[42] Yet, those stark figures that 1 in 5 children grow up in households without a device or access to the internet continues to create inequalities.

The OECD has found that:

"Digital technology has the ability to support all students as they move through education, and can help promote equity and inclusion within systems. However, without support for equity and inclusion, technology can also be yet another barrier if factors such as digital inequalities and inclusive design are not addressed."[43]

Finally, where there are Mayoral Combined Authorities and Local Authorities leading the way on tackling digital exclusion, introducing programmes to mitigate its impact on other areas such as health and education, the lack of available national knowledge of regional gaps continues to act as a barrier for policymakers to properly understand both the impacts of digital exclusion and even further, the areas where it is most needed to be tackled. Though there is existing information on this, it is sparse.

Developments in the Proposed Solutions to Digital Exclusion

Leadership and Coordination

Over the course of the past year, a number of suggested digital inclusion solutions were discussed in meetings and submissions to the digital inclusion APPG. These, as well as wider industry and parliamentary input, have been used to inform the recommendations at the end of this report.

The strongest and most consistently made point by stakeholders is that top-down leadership is required from the Government to tackle the digital divide. This leadership has been called for with a number of objectives in mind.

First, to set a clear strategic direction for digital inclusion policy, with set goals and metrics and a structure in place to oversee their delivery. It was broadly agreed that a single Department needs to oversee the design and implementation of this strategy. DSIT was widely agreed to be the most natural fit, with the a digital inclusion unit in the Cabinet Office also touted as an option due to the cross-cutting nature of the issue.[44]

Following from this was the idea that, whilst one department should take overall ownership of the strategy, digital inclusion should be embedded across all policies and Departments – reflective of its importance to all aspects of public service provision, including healthcare, education, work and pensions, financial inclusion and more.

Finally, there was a consensus that top-down leadership is necessary to centralise the numerous digital inclusion initiatives that can currently be found in the UK, both in the private sector, third sector, and regionally and locally.

Whilst these initiatives have in many cases delivered transformative work in improving people's lives, there is an increasing recognition that their impact can be more greatly felt through centralised coordination, backed by UK-wide data and with clear strategic direction.

It would also be up to the Department responsible for digital inclusion to consult with industry and local/regional government to understand the parameters in which they are able to act, and where enhanced state support is needed. This need has been highlighted by the number of local, regional and devolved initiatives shared with the APPG over the past year.

These include the Greater Manchester Combined Authority's Get Online Greater Manchester Initiative, which coordinates local council digital inclusion efforts and acts as a trusted source of digital inclusion support.[45] Similarly, the GMCA's Digital Champions Network brings together industry, communities, local authorities and public sector volunteers to support digital skills and literacy for individuals and community-focussed organisations across the region.[46]

We have also seen Digital Essex, in partnership with Mortar and community volunteering services in Essex, develop a digital skills help finder tool. The tool will be made available, free to Essex residents and service providers to support residents in assessing their essential digital skills for work and life (based on the Essential Digital Skills framework), signposting to relevant online, self-paced learning modules to move up the skills ladder and access devices, data via our National Databank hubs and advice on social tariffs. The tool will enable service providers to map and manage learner journeys, via a dashboard that they can also use to bid for additional funding, showing the value they offer to our communities.

The APPG has also heard from 100% Digital Leeds in the past on the difficulty of pulling together funding for digital inclusion, and the need to draw funds from multiple different sources nationally in order to support digital inclusion initiatives. This speaks to the need to regularise funding.[47]

While these are just a cross section of initiatives from local, regional and devolved authorities across the UK, they demonstrate the variety of solutions already being implemented on this level, but also the challenges that they face in implementing digital inclusion support..

Funding

Where digital inclusion funding exists, it is spread across a patchwork of small pots. Discussions held by the Digital Inclusion APPG have seen consistent calls for these to be co-ordinated or merged as part of the digital inclusion strategy outlined above.[48] In particular, the point was made that the NHS and DWP have their own Digital inclusion programmes – essentially siloing them into small, inefficient pots that require centralisation.[49]

On top of this however, is an understanding that new funds are required to accelerate digital inclusion support in the UK. Research from Good Things Foundation and Cebr estimates a £1.4bn investment would lead be required to unlock the full £13.7bn of benefit from narrowing the digital divide.[50] To help move towards this aim, several funding mechanisms have been suggested.

First, reallocating 2% of Project Gigabit funding – a £5bn government infrastructure subsidy for rural fibre - would raise £100m to tackle the most pressing digital inclusion issues.[51]

A proposal published by LSE to essentially reinvest all tax receipts received from VAT on social tariffs into a newly formed social fund was also backed. This would provide an estimated "£2.1 billion per year to provide all 6.8 million UK households in receipt of means-tested benefits with equitable access to broadband, whilst still leaving £876 million every year to improve the funding of nationwide computer and laptop subsidy schemes and digital skills training."[52]

In terms of other pre-existing funds, the adult education budget, UK Shared Prosperity Fund and £2.6bn 'Multiply' scheme were all put forward as schemes which could be more effectively angled towards digital literacy.[53]

Finally, the prospect of TV reform was discussed, taking advantage of the move from broadcast to IP (internet protocol). To this end, it was noted that broadcast TV as it currently works has a fixed cost of about £300m a year to operate, despite the fact that TV is increasingly migrating online (50% are connected to the internet). At some point in the next 10-20 years, this means the BBC and ITV will need to go fully online, offering industry a huge opportunity to up-skill and include previously excluded groups like pensioners in the digital transition. This also offers an opportunity for content distributors such as Google and Netflix to pay into the transition, as their operating costs through IPTV are far lower than in broadcast.

Section Two:
Case Studies

The following case studies have been contributed from organisations tackling digital exclusion across industry, academia and the third sector.

They have been compiled both to highlight the ongoing work in the sector, as well as demonstrate some of the proposed solutions to digital inclusion issues presented to the Digital Inclusion APPG over the past year.

Good Things Foundation

Fix the digital divide: It's time to get to work

Digital exclusion in the UK

Banks are shutting their doors, healthcare is moving online, and the cost-of-living crisis continues. We live in the age of AI, yet one in five people feel left behind by technology. We believe that everyone should have the access, skills, and support to benefit from digital - and we're not alone:

- 77% believe being able to access the internet is an essential need.

- 92% believe that most essential services these days require internet access.

- 76% believe the UK Government should invest in digital skills support so everyone has the skills they need to get online.

The cross-party House of Lords committee's report on digital exclusion pointed to 'political lethargy' on fixing the UK's digital divide. There remains 8.5 million people lacking basic digital skills in this country and 2.4 million households unable to afford their mobile phone contract. Almost half of UK families with children do not meet the Minimum Digital Living Standard. A digital exclusion crisis is sweeping the UK.

Digital inclusion is integral to the Government's five missions. It's time for them to fix the digital divide to achieve them.

And we're not the only ones banging this drum, from our business and civil society partners to devolved powers - there is a cross-sector coalition necessitating greater centralised action to support digital inclusion, for every community in the country.

The UK's leading digital inclusion charity

For over a decade, Good Things Foundation has been at the forefront of tackling digital exclusion. We have connected almost 600,000 individuals with support since launching our Strategy 2022-2025 in partnership with Virgin Media O2, Vodafone, Nominet, and Accenture, as well as Google.org, JP Morgan, Virgin Money, HMRC, LOTI and the Greater London Authority.

At the heart of our charity is the National Digital Inclusion Network, which seeks to collate and coordinate all community organisations supporting people experiencing digital exclusion - currently 5,000 digital inclusion hubs have joined the Network.

Together we deliver free, hyperlocal services to help excluded people benefit from digital, such as the National Databank, National Device Bank, and Learn My Way.

In June 2024 we published our Manifesto to Fix the Digital Divide which laid out the opportunities for the Government to show **sustained, joined-up leadership on digital inclusion**.

Ahead of the UK General Election, the Secretary of State for Science, Innovation and Technology, Peter Kyle, announced that the Labour Party pledged their support to digital inclusion and visited a hub in Croydon to see the impact of community delivery firsthand.

Recommendations for Government: It's time to get to work

We believe it's now time to get to work. We're calling for digital inclusion policies to be embedded across Government - at all levels, in every corner of the UK - and advocating for five key short term actions. We're asking the UK Government to:

1. **Lead a cross-sector digital inclusion action plan by December**
   The UK Government should spearhead a co-ordinated, strategic approach by bringing together businesses, civil society, policymakers, and others to tackle digital exclusion on a national scale. An action plan developed by December 2024 will ensure that resources are aligned, and current momentum is taken advantage of.

2. **Remove significant barriers to digital inclusion and skills to help people into work**
   A key priority must be addressing the roadblocks preventing people from becoming and remaining digitally included, and acquiring digital skills. Removing these barriers will empower people, especially those in deprived areas, to access job opportunities and participate fully in work in the AI age.

3. **Commit to making their old devices available to families and adults who need them**
   The UK is the second-largest emitter of electronic waste per capita. The UK Government should commit to making end-of-use technology available through the National Device Bank, helping families and adults in need - while reducing e-waste.

4. **Co-invest in the National Digital Inclusion Network to provide community support for people to use online public services**
   By co-investing in the National Digital Inclusion Network, community-based digital support can be enhanced and people experiencing digital exclusion can effectively use essential online public services like healthcare, education, and benefits portals.

5. **Co-create a solution for the 1 million+ households in deep data poverty**
   Affordable internet access is vital for inclusion. The Government should work alongside us and our partners through our Data Poverty Lab to develop and implement solutions that make connectivity affordable for those most underserved - specifically those in incomes too low to afford the discounted social tariffs they are eligible for.

Conclusion

Digital inclusion is not a luxury but a necessity in today's world. As we navigate the complexities of the AI age, ensuring that everyone has the access, skills, and support to thrive online is critical. With our partners and supporters, Good Things Foundation has laid the integral groundwork – however, the problem is far from solved.

We call on the UK Government to embrace these recommendations and those in this report, to ensure no one is left behind in our digital society. It's time to get to work and fix the digital divide – for good.

Keep up to date about Good Things Foundation's policy work through our website at: goodthingsfoundation.org/fix-the-digital-divide/

Sources

- Frontier Economics for BT Group (2023), Low Income Households and Affording Connectivity[54];

- Good Things Foundation (2024), Digital Nation[55];

- Lloyds Bank (2023), Consumer Digital Index[56];

- Ofcom (2024), Affordability Tracker[57];

- Public First (2023), Poll for Good Things Foundation[58];

- Public First (2024), Poll for Good Things Foundation;

- Virgin Media O2 (2023), Polling Data.

Vodafone

Tackling the digital divide has long been at the heart of Vodafone's business strategy. In 2022, we donated connectivity to one million people, and pledged to go further to help a total of four million people and businesses cross the digital divide by the end of 2025 through our everyone.connected campaign.

The campaign has seen us donate connectivity and technology to those that need it most by working with our strategic partners, Good Things Foundation, The Trussell Trust, and NSPCC, to provide targeted, affordable tariffs and services alongside upskilling for businesses and communities.

Vodafone was the first network provider to offer social tariffs across both mobile and broadband. Our VOXI for Now mobile tariff costs just £10 a month with unlimited data, calls and texts. Alongside this we have a broadband social tariff for £20 per month with up to 73Mbps download speeds with no set up fees, no termination fees and no in-contract price rises.

We also recognise that social tariffs might not be the ideal solution for many. That is why we also have a range of partnerships and programmes to help give more people the connectivity and skills they need to stay connected and participate fully in an increasingly digital society. This includes:

- Great British Tech Appeal – any individual or business can donate old devices and we'll clean up, rebox and give the donated tech to someone in need through our charity partners, along with six months of free data, calls and texts.

- Charities.connected – any UK registered charity can apply for free Vodafone SIMs with 40GB data a month for six months, plus unlimited calls and texts.

- National Databank – Vodafone has joined the Good Things Foundation's National Databank to provide free data for the charity's network of community groups across the UK.

- Sports.connected – Partnering with Sported we offer free connectivity, digital skills training and a grant-giving scheme to young people in community groups.

With access to connectivity, it is equally important that people have the skills and confidence to stay connected and also ensure people are able to enjoy safe digital lives. This is particularly important as services and communities are increasingly moving online.

Through our digital parenting advice and resources, individuals are able to access expertise to help make the right digital choices for their family. Vodafone's Digital Parenting Pro is an interactive resource which provides helpful information about what parental controls and safety settings are available across the most popular apps, games and devices.

It is important to remember that the digital divide not only impacts individuals but businesses as well, particularly SMEs in danger of being left behind. We have found a clear demand for support from SMEs who feel they need to improve their digital skills and capabilities to thrive.

Looking ahead, we have pledged to upskill the online capabilities of 800,000 SMEs by 2025 through our online support centre V-Hub. This initiative provides a wide variety of free online training courses, mentoring and workshops to help SMEs maximise business opportunities online, adopt new technology, mitigate cyber-attacks and meet with other like-minded individuals.

This is an issue that has evolved over recent years, intensified by the pandemic and cost-of-living. With that we have continued to reassess our approach, to ensure we grow our thinking to help tackle the changing causes of digital exclusion and help those that are in most need. This is a complex problem affecting people for a wide variety of reasons and no single, simple solution.

To be able to fully close the digital divide, we need businesses, government, local authorities and charities, to work collectively on sustained long-term interventions. We need to ensure that those households and individuals that need help get it whether that is connectivity, devices, skills or a combination of all of them.

This must include:

- Government should publish an updated digital inclusion strategy **with a clear timetable to convert into a delivery plan with commitment** from departments across Whitehall to act and determine how **the whole sector** can, together solve this issue in the long-term working in **partnership with the third sector**. This includes individual departments playing their part to support closing the digital divide.

- We need better **data** on who needs help and what help they need – given it could be affordability, lack of available connectivity, digital skills perhaps linked to broader special educational needs or lack of an appropriate device.

- Identifying those consumers that require support has always proved difficult as we only know our own customer base. The Department for Work and Pensions have a direct relationship with benefit recipients through channels such as job centres and therefore Government should work with industry to deliver an **awareness campaign** using these channels.

- Consumers facing affordability challenges should have a voucher or funded scheme available to them. We would welcome replication of the successful models that have worked in other areas of the country where connectivity, devices and skills are provided to individuals, and this is **funded**.

BT Group

Digital inclusion and mission led Government

BT Group welcomes the new Government and its mission led approach. This moment of change represents a chance to reset and bring overlooked policy issues, such as digital inclusion, to the top of the new Government's agenda.

We believe that the country needs to move quickly to complete the digital revolution – both through completing ongoing infrastructure upgrades, but importantly also through supporting adoption of digital technology among the groups in society that have so far been left behind. There are around three million households offline, of which one million are working age but mostly not working, and two million are older.

Doing so in a coordinated way is a vital enabler to many of the Government's missions, in particular:

- Mission 1– kickstarting economic growth, especially improving productivity and creating good jobs

- Mission 3 – breaking down barriers to opportunity for young people in education and working age people that are not in work

- Mission 5 – build an NHS fit for the future that empowers people to live well for longer, especially older people.

For tech to transform society we need a new digital inclusion strategy to provide the required leadership and coordination to accelerate take-up right across society and the economy. Doing this would:

Improve rates of economic activity and employment

Recent research which BT commissioned from Frontier Economics found that there are at least one million working age households trapped in worklessness due to their very low incomes preventing them from being able to access connectivity and/or devices, and a lack of digital skills and confidence.[59]

The plans set out by the new Work and Pensions Secretary for a White Paper to tackle economic inactivity are welcome.[60] Developing effective programmes which empower very low income households to get the connectivity and devices they need AND to develop digital skills and confidence will be central to empowering these households back into the labour market and out of poverty.

A recent DWP study found that Job Seekers Allowance (JSA) claimants were more likely to be digitally engaged than Universal Credit claimants, and of those digitally engaged, JSA claimants were much more likely that UC claimant to use a laptop to access the internet (78% vs 46%).[61] This is consistent with Frontier Economics findings that lack of digital skills and access is a key barrier to working for those out of work.

Address poverty, especially child poverty

We likewise welcome the Government's announced review into child poverty. Poor and vulnerable households can often lack the money or skills to be a full part of the digital economy, and there is a risk this barrier is perpetuated to children currently growing up in poverty if it is not dismantled.

In research BT Group which has commissioned, Yonder found that digitally excluded low income households with children not only had incomes too low to be able to afford any form of connectivity, but also experienced a range of other barriers including:

- Language: Some households did not have an adult that was confident in English

- Financial confidence and literacy: Some households had never had a billing relationship with a company before, and either did not have or were reluctant to share banking details to access connectivity. The Lloyds Digital Index research has found that half of those with digital skills issues have low or very low financial literacy.[62]

BT's work with the Department of Education during the pandemic suggested there may be 250,000 households with school age children without broadband. As with the group that are working age but not currently working, supporting households that are currently digitally excluded to get connected and develop their digital skills offers both near term benefits (to better manage their budgets and increase their income via better work opportunities) and long term benefits (to support their children's education and own digital skills development to improve their long term life chances).

Support the digitization of public services like the NHS and improve outcomes for their high frequency users, especially older people

We welcome the new Government's ambitions to digitise public services, especially the NHS. For this to be feasible, it requires a supportive plan to enable the three million households that don't use digital services to be able to do so.

Of this group, more than two million are older households. Frontier Economics have found that few of them have affordability barriers to digital services (so pricing discounts do not motivate them), but all have significant skills and motivational barriers to using online services.

Some in this cohort have ended their working lives without ever having to use a computer, so the leap to be able to engage with more complex digital health services - such as a digital ward to manage a long term health condition - is large.

Yet for the NHS to be able to sustainably support an ageing population with an increasing number of long term conditions to manage, it is essential that this barrier is addressed, both to manage healthcare costs and to improve quality of life for those receiving care.

Therefore we urge the Government to develop a joined up nationwide programme to empower people of all ages to get connected, with a suitable device, and build the skills they need to use digital services that will improve their lives.

This programme should have two strands.

First, scaling up effective programmes which empower households to get the connectivity and devices they need AND to develop digital skills and confidence to use them. AbilityNet have previously shared their views of what good digital skills support looks like. There are other schemes of similar quality, but their provision at the moment is patchy

and it is not clear to either citizens or those running services which have service users needing support how to refer people over.

What's needed is a consistent nationwide support offer which the NHS, Job Centre Plus and other services can refer people to for support. Clearly this would need an innovative funding package, potentially including support from financial contributions from the larger technology giants. Policy makers should consider how comparatively small levels of additional funding – combined with dedicated additional Government funding - can be generated to support those so far left behind by digital transition.

Second, to reduce the complexity of digital services so less confident citizens find it easier to engage with online services. A good first step is moving the Government Digital Service (GDS) into DSIT; the Government should consider going further to develop new standards and requirements for simplification of digital services so that the level of digital skills required is more feasible for everyone. For example, creating a consistent layout of public facing websites and apps, as well as standards of consistency, interoperability and length of utility and support for apps and devices before they become obsolete.

Given the challenges facing us today BT Group believes that driving greater digital inclusion should be at the heart of the new Government's plans. Doing so will reduce inequality, empower citizens and support improved productivity and growth in the UK economy. At BT we stand ready to do our part, but a new strategy to set prioritisation, leadership and coordination from the Government will be the key to accelerating progress.

Helen Burrows
Content and services policy director

Will Black
Senior policy manager

Virgin Money

At Virgin Money, we have an ambition to become the UK's best digital bank. To achieve this goal, we need to ensure that our customers of today and those of the future are equipped with the tools and knowledge that they need to thrive in an increasingly digital world.

Virgin Money includes banking heritages from Clydesdale Bank, Yorkshire Bank and Northern Rock, but as recent research conducted with the Centre for Social Justice (CSJ) has shown, in our heartlands of Scotland, Yorkshire and the North East, levels of digital exclusion are far higher than the national average.[63]

What's more, our research has found that digital exclusion is impacting our ability to meet our ESG goal of tackling the poverty premium – that's the additional charge that 14 million people on lower incomes pay to access essential services. This is because people on lower incomes are twice as likely to be digitally excluded, and as a result of not being able to shop online are paying on average 25% more for goods and services.

This is why the bank is proud to have collaborated with Good Things Foundation to provide free 25GB SIM cards at every Virgin Money branch in the UK. These SIM cards are available to anyone impacted by broadband or data poverty, regardless of whether or not they are a Virgin Money customer.

At our branches, specially trained colleagues work with users to register their cards, show them how to get online and offer tips on how to stay safe when browsing.

Since the beginning of our collaboration with Good Things Foundation, the bank has distributed over 1,000 free SIM cards across the UK . But more importantly, we have seen hundreds of examples of this activity having a significant impact on people's lives, from helping people get accommodation, to securing jobs and maintaining vital social interactions with loved ones.

And we haven't stopped there. In May, we announced that beyond our own branch network we would be rolling out this programme to any banking hub where Virgin Money has a presence on our banking day. We have also ensured that our customer care team, who engage with vulnerable or potentially vulnerable customers, are able to direct anyone in data poverty to their nearest distributor of free SIM Cards.

Moving forward, our intention is to focus on what we can do to improve device donation and skills training for the digitally excluded. We have work underway to better help our colleagues and customers donate their old devices to those impacted by digital exclusion and we are rolling out the digital skills training platform "Learn My Way" for our customers. This will enable us to help them access online training to develop digital skills and confidence online.

Furthermore in 2023 the bank committed £3.3million to support the Virgin Money Foundation's ambition of tackling digital poverty in local communities. As a result of this, the Foundation has awarded £1.4million in new multi-year grants to neighbourhood based digital inclusion initiatives across Glasgow and the North East of England, supported 80 local schools across the UK to tackle digital poverty in their school community and trained over 100 Virgin Money colleagues as Digital Champions.

While we are proud of the progress that we have made, to deliver meaningful and lasting change, collaboration with Government is needed. That is why we hope the new Government will commit to:

- Introducing a new UK Digital Inclusion Strategy that sits at the heart of an updated National Digital Strategy. The UK's digital inclusion strategy has not been updated since 2014 and a refresh is essential to preventing people getting left behind as the world digitises. It is essential that this aligns with any new Financial Inclusion Strategy given the inextricable link between these two issues.

- Review the efficacy of broadband social tariffs, to improve take-up among those who are eligible while developing a sustainable solution for this who simply can't afford access.

- Committing to funding for a long-term digital skills programme targeted at unemployed people and those with limited digital skills, that will keep pace with fast-moving technological developments in the workplace and at home.

These measures will help to move the dial on this issue and re-engage individuals and communities that have become isolated due to the digitisation of our society. What is more, it could provide a significant boost to the UK economy, with research from Good Things Foundation suggesting that increased digital inclusion could result in a £13.7 billion uplift to UK GDP.[66]

The work that has been done by expert organisations and businesses to tackle digital exclusion, many of whom are members of the APPG, have provided a variety of proof of concept that if adopted and scaled-up by Government could address the barriers to digital inclusion and unlock the UK's economic potential.

We look forward to working alongside our partners in the APPG and the Government to help secure the changes needed to meaningfully tackle the digital divide.

Nominet

Fixing the Digital Divide

The last twelve months have been an important year for Nominet and its ambition to address digital exclusion at scale across the UK.

It is the first year that our partnership with Good Things Foundation has been in full delivery. Our commitment to Fixing the Digital Divide for good and supporting over 1 million people is being realised through this strategic partnership with funding of £1.5m per year.

This means that the initiatives we've helped shape and define since the pandemic - the National Data Bank and the National Device Bank - are making a real, tangible difference in communities across the UK.

The Data Poverty Lab

A particular focus of our partnership with Good Things Foundation has been our groundbreaking approach to data poverty. After bringing attention to this form of digital exclusion over the last number of years, we established the Data Poverty Lab to explore, test and bring a greater depth of insight into this newly recognised aspect of digital poverty.

The lab has entered its 3rd and latest phase in the last 6 months following on from the seminal Fellowships programme, with the focus evolving to explore which of the many interventions and innovations at our disposal can have the most potential for scale and impact. It will evaluate the role of social tariffs, zero-rating, the National Data Bank, Community Wi-fi, Wi-fi-in-a-box and other pathways, exploring what can work now and in the future. We'll be publishing the findings of this work in the coming months.

A new settlement for Digital Inclusion

This year also saw Nominet and Good Things Foundation bring forward proposals to the APPG for how central government can better organise, resource and coordinate efforts to tackle digital exclusion – moving the agenda from an aspiration to a reality for millions of people across the UK.

Together, we made the case that the social infrastructure, expertise and motivation to tackle digital exclusion already exists right across the UK, in civil society, local government and combined authorities. And that with more determination, coordination and direction centrally - as highlighted by the House of Lords report - our ability to have a transformational impact is within reach.

Young People and Digital Exclusion

Nominet launched its 3rd annual Digital Youth Index this year. The report, which hears the attitudes, behaviours and beliefs of over 4,000 young people across the UK yet again highlighted how access and connectivity, key drivers of digital exclusion, continue to affect social mobility, access to education and early-stage careers.

Findings from this year include:

- We estimate up to 2 million young people across the UK aged 8-25 lack access to a learning device (a laptop or desktop computer), 14% of all young people in the UK.

- Nearly 570,000 young people in the UK may not have an internet-enabled device.

- 15% of all young people are without broadband access at home. Young people in receipt of free school meals remain worse affected than the overall population (23%). This represents a 5% increase on our findings in 2022.

- Combined these figures have worrying implications for educational equality and social mobility.

"I wish my teacher understood why I take longer to do assignments as I don't have access to the internet as easy as everyone else."

18 year old female

"A lot of young people that we work with, they do have a phone but it doesn't have internet, or it doesn't have a sufficient camera or it only works with WiFi, which is a bit up and down in various places. And again, WiFi in homes, that can be pretty difficult to come by for some of our young people as well, especially if they're living in a youth hostel."

Social Worker

First steps to a better future

It's clear from our work across the programmes and projects Nominet supports that digital exclusion is no longer determined simply by age. As such this year, working closely with the Micro:bit Education Foundation and the BBC, we delivered over 650,000 BBC Micro:bits to over 90% of primary schools. Alongside curriculum guides, projects and teacher support, we're giving every child in Key Stage 2 across the UK a chance to create, build and engage with physical computing and technology.

As we see more and more young people and families struggle to connect or afford devices, we need to help young people maintain the skills, confidence and motivation to thrive in a society that is inevitably digital by default. Our work on universal digital skills for young people goes some way towards recognising the link between the two.

Virgin Media O2

Virgin Media O2's continued action to close the digital divide

At Virgin Media O2 we continue to work with our partners to address the digital divide. Since 2022, we have provided meaningful, long-term connectivity for over 260,000 digitally excluded people through our free and affordable connectivity initiatives:

- **We provide free data:** Our flagship initiative, the National Databank, co-founded with Good Things Foundation, has more than doubled the amount of community Hubs to over 2500 across the country since the last report. This includes the initiative being rolled out to 241 of our retail stores. These Hubs have provided free SIM cards with 25GB data per month, free calls and texts for up to 12 months.

- **We provide free devices:** Working in partnership with Hubbub, our Community Calling programme has now distributed over 20,000 devices with 12 months of free connectivity to the most digitally excluded groups across the UK. Hubbub and Virgin Media O2 also collaborate to run the Time After Time fund. In February 2024, the fund allocated a second round of grants totalling £500,000. The grants support solutions that help connect the 1.5 million households in the UK who are digitally disconnected and have limited access to devices or the internet while reducing e-waste and promoting circularity in technology. The eight projects selected deliver impact through device repair, refurbishment, and rehoming, supporting disadvantaged people across the nation. The fund aims to bridge this gap by supporting innovative approaches to digital inclusion that leverage e-waste, surplus devices and the circular economy - ensuring tech can be used by those that need it, time after time.

- **We provide affordable services:** In addition to our existing broadband social tariffs, Essential Broadband and Essential Broadband Plus, we recently launched a mobile social tariff. The O2 Essential Plan provides people on low incomes with a low-cost tariff. For £10 per month customers get 10GBs of data, unlimited calls and text messages and EU roaming, and benefit from O2 Priority which provides low-cost and priority access to food and beverages, lifestyle and entertainment, helping people to make further savings when digitally connected. Across Virgin Media and O2, we continue to provide specialist team who support existing customers who are struggling to pay their bills, support includes alternative payment plans.

- **We zero-rate essential websites:** O2 customers can access more than 60 websites with O2 that offer financial, health and wellbeing information, without using any of their data allowance. This includes the Money Advice Service, Citizens Advice and Samaritans. Ensuring access to these websites even if customers have no data left.

- **We work in partnership to expand digital infrastructure:** Virgin Media O2, working in partnership with Government and other providers, delivered 227 sites contributing the first phase of the Shared Rural Network programme, bringing faster and more reliable 4G connectivity to rural communities across the UK. And in the last 14 months, Virgin Media O2, as the build partner for nexfibre, have extended their fibre network to reach one million premises.

Digital exclusion isn't just an issue of access and affordability, we also focus on making the internet a safer place, building people's skills, confidence and motivation to use it, and increasing trust in the digital world.

Since 2022, we have equipped over 5.2 million people with online tools and knowledge to thrive through digital literacy training and online safety guidance for young people. In addition, our staff continue to use their five paid days of volunteering to deliver digital literacy and online safety support in the community through Connect More, our employee-led digital skills training programme. Our recent campaign in partnership with Internet Matters, Action for Children and Good Things Foundation, supports parents and guardians to have conversations with their children about staying safe online. Launched to align with summer school holidays, the Find the Right Words campaign, also highlights online safety guards on both O2 and Virgin Media that parents and guardians can set.

With being a scam victim often having a knock-on impact in people's confidence online, we're working hard to prevent fraud from presenting another barrier to people using the internet. We are dedicated to our efforts to block scams and fraud from reaching our customers. Via our O2 network, in 2023 we blocked over 89 million phishing text messages from reaching our customers and in 2024 we're launching free AI-powered scam and spam detection tools on devices to further protect our customers. We also raise awareness of potential risks to customers; in January we contacted customers about one time authorisation code fraud and provide general tips for staying safe from scams. We also support the Good Things Foundation's Learn My way platform which provides people with training on how to deal with scams.

Work to be done

There remains a lot to do to address the digital divide. Virgin Media O2 stand committed to connecting 1 million digitally excluded people by end of 2025 and equipping 6 million with the tools and knowledge to thrive in the online world.

The digital divide is persistent, it isn't going away. A collective and coordinated approach is the only way to close the digital divide. We will continue to work in partnership with our peers, with our partners and with the digital inclusion movement. We welcome the ongoing work of the Digital Inclusion All Party Parliamentary Group on this integral policy area.

A time for leadership

There have been encouraging signs from the new Government that they understand the importance of digital inclusion and empowerment – as seen by Peter Kyle's pre-election commitment to enhancing digital skills and confidence as well as pledging to repurpose old government tech for digital inclusion at London Tech Week. We are also optimistic given Chris Bryant's comments at Connected Britain that " we want to work with you to find creative solutions to digital inclusion" We welcome this as a positive beginning and further call on Government to:

1. Implement a new Digital Inclusion Strategy that delivers real leadership for the UK;

2. Reduce VAT on broadband and mobile social tariffs to at least 5% to align with VAT rate on domestic gas and electricity; and,

3. Increase digital literacy and citizenship education in schools to develop the nation's ability to navigate the internet safely and thrive. Failure to develop a strong digital literacy programme will only worsen the digital divide.education in schools to develop the nation's ability to navigate the internet safely and thrive. Failure to develop a strong digital skills programme will only worsen the digital divide.

Jisc

Digital Technologies

Jisc is responsible for collating one of the largest datasets of students' digital experiences in the UK.[65] The data helps UK higher education (HE) and further education (FE) institutions to shape their digital strategies, make investment plans and provide support to students and staff as the learning environment continues to change.

Jisc's digital experience insights (DEI) survey (2023/24) shows that students in HE and FE have experienced a wide range of difficulties when using digital technologies in learning. The findings of the survey showed that access to even basic connectivity continues to be a challenge for learners, highlighting digital inequalities. 45% of FE learners and 42% of HE students experienced problems with mobile data access. The quality of connectivity is also a major concern, with 55% of HE students and 60% of FE learners reporting problems with poor Wi-Fi connections.

As well as connectivity, there is perhaps the more fundamental issue of students having access to a suitable device. 41% of FE learners said they had problems with digital technologies in learning because they didn't have a suitable device, with 34% of HE students experiencing the same. In FE, 5% of learners relied solely on a smartphone for learning.

Four years on from its onset, the COVID-19 pandemic has transformed the learning landscape irrevocably. As well as supporting learners with their continuing connectivity needs, Jisc has identified the need for institutions to upgrade the devices that learners receive to help them access learning. There is a currently a pressing need for institutions to re-invest in newer devices for learners, particularly due to the oncoming Microsoft migration to Windows 11 in 2025, which will see the end of security updates and technology support for Windows 10 devices.

Digital literacy and support

Although students and learners are generally positive about the overall support offered to them for learning using technology, Jisc's DEI surveys found that support for individual skills and competencies, and support for employment related skills, received less positive feedback from students.

In HE, 54% of students reported receiving guidance on the digital skills required for their courses. Additionally, 37% of students had their digital skills and training needs assessed, and the same percentage had opportunities to develop digital skills for future employment. In FE, these figures were 52%, 40%, and 40%, respectively.

Given the low delivery levels of digital skills, assessment and training, Jisc has identified the need for institutions to review how they assess and support their learners with their digital skills development. There is also a need for institutions to incorporate into their curriculum the digital vocational skills that learners will need when entering the workforce. For example, these could include using drones within logistics roles, surveying and across public services, or using the latest digital techniques in hairdressing and beauty therapy.

Generative AI

Learners are continually exploring the capabilities and boundaries of generative AI (genAI). They are using genAI tools to augment their learning, seeing them as an effective digital assistant to support them to learn in an efficient and effective way. For example, learners with limited support from family and friends are using genAI tools to proofread their work and provide feedback, in the same way a parent or carer would do. There are also excellent examples of genAI tools being used to address inclusion, such as a project at Hull College where they are using genAI tools to support learner induction and integration into college life for English for Speakers of Other Language (ESOL) learners.[66]

Learners highlight that they are increasingly concerned about equity, bias and accessibility issues related to genAI and want educators to address these challenges in a safe, inclusive and responsive way.[67] Jisc notes the cost to access genAI tools can prevent some demographic groups, such as, learners from low-income families from accessing them. Given learners with access to these tools can benefit from 'an on demand virtual digital assistant' there is a danger the digital divide will increase without institutional support to provide universal access to these tools.

Jisc encourages institutions to ensure they incorporate relevant generative AI literacy skills into curricula as this will be essential for keeping learners safe, secure and helping them identify trustworthy information thus preparing learners for future.

Digital accessibility

To ensure the best use of technology and real change, disabled people need robust infrastructure, on-going support with using assistive technology, and for digital information and commercial products to meet global accessibility standards.[68]

Jisc supports the proposed creation of a National Centre for Accessible and Assistive Technology to provide expert guidance to disabled people and service providers.[69]

Rapid advances in AI are enabling more disabled people and neurodivergent people to independently learn, work, and be active participants in society.[70] For example, inbuilt assistive tools to support writing and understanding, are popular with students to the extent these are viewed as non-specialist productivity tools.

Innovation must be guided to benefit society as a whole, including disabled people, or there is a risk of further disadvantage. Collaboration between researchers, industry and policy makers has been identified as a priority for participants in Jisc's Accessible Digital Futures project.[71]

Another priority is upskilling of workers to develop awareness of assistive technology and to ensure digital content is accessible. Jisc's projects on building a training matrix and our online course about legal and regulatory expectations could represent scalable methods to achieve this.[72,73]

Jisc's mission to improve lives through digital transformation in education and research has never been more pertinent than it is now. The need for digital to be seen as a critical part of the learning experience, for learners and staff alike, is imperative as wider society embraces the benefits of technologies in our public services, education sectors and wider workforces. Jisc continues to work to enable and support education providers to digitally transform, providing the expertise and tools to keep institutions digitally mature, maintaining the UK's position as a global leader in world class education.
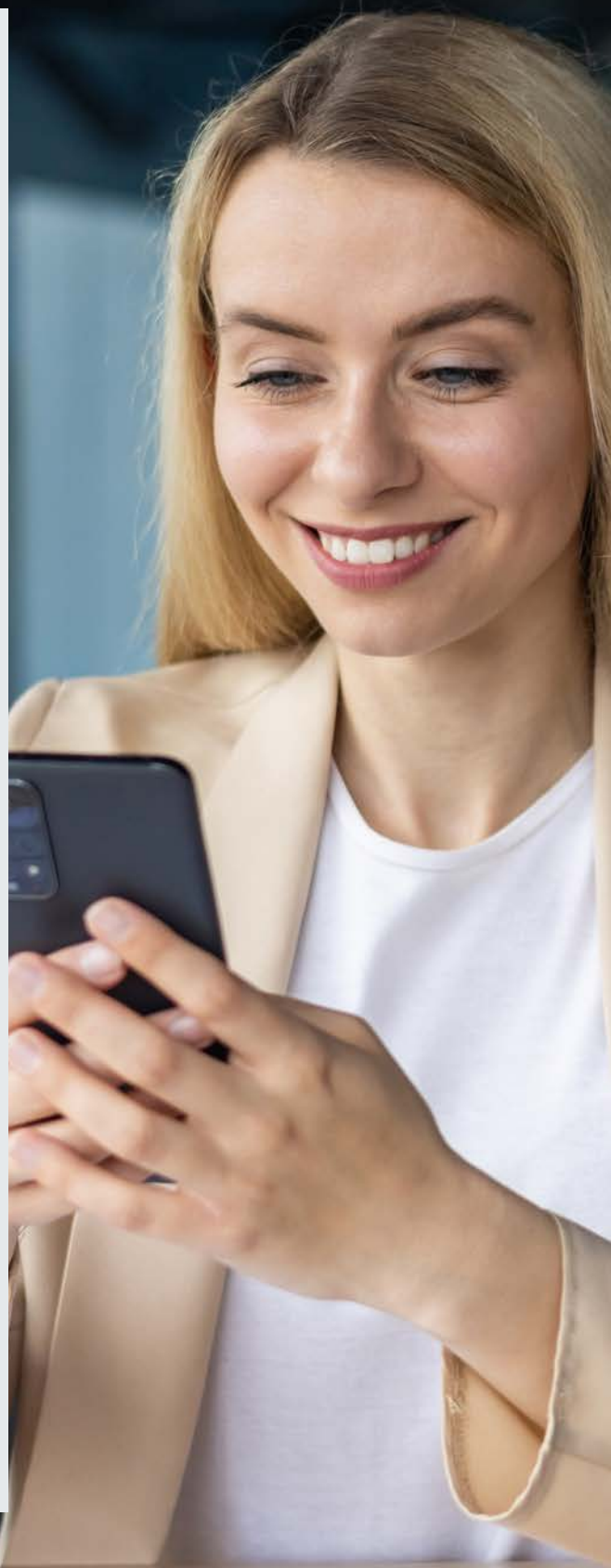
We Are Group

We Are Group – empowering people to live better lives.

We Are Group is a social impact company specialising in delivering national and regional inclusion and support initiatives. For over a decade, we have provided enhanced digital inclusion by providing skills training and assistance to combat the unintended consequences of transformation and automation, rendering tens of thousands of UK citizens unable to access crucial everyday services, such as banking, insurance policies and online forms. We empower people to live better lives, ensuring they are not left behind and contribute to restoring their mental health and well-being.

Throughout 2023, we initiated digital inclusion programmes for individuals with minimal digital skills by teaching them how to access online resources and services. We facilitated comprehensive initiatives, delivering sessions across the United Kingdom to engage over **16,000** individuals. Notably, **67% of participants experienced improved confidence and increased benefits** from digital resources, becoming empowered to make positive lifestyle choices and to feel more in control of their daily lives.

Digital Inclusion through Digital Skills Training

In 2023, our Digital Skills support programmes empowered 5,006 people with essential digital knowledge, long-term skills, and confidence to use digital devices and online services adeptly. Our digital trainers, who form part of our nationwide network of Community Partners, delivered a total of 4,622 remote one-to-one training sessions, with each session providing a significant step towards digital inclusion.

During the comprehensive sessions, participants learn how to navigate digital devices and platforms independently. They establish internet connectivity, communicate via email and messaging apps, shop online, practice online safety, use online banking services to manage their money effectively and harness the benefits of using price comparison websites.

As part of our commitment to ensuring access to essential digital tools, we supplied 1,411 free devices. Our collaboration with Vodafone also enabled us to provide 1,184 free SIM cards with six months of data, bolstering individuals' journey towards digital inclusion.

After completing their Digital Skills Training, a significant 73% of participants reported feeling more connected to others with a reduction in feelings of isolation. 67% of participants also expressed confidence in applying the digital skills they had acquired.

We played a crucial role in supporting residents of Sanctuary Housing, Orbit Housing, the Royal Borough of Kensington and Chelsea, and the Royal Borough of Kingston Upon Thames. Residents in these areas experienced a significant improvement in their digital skills and overall independence.

Orbit Housing residents, in particular, were considered to be significantly vulnerable for various reasons. Through our digital skills training, we improved these residents' access to online welfare services, digital health services, and the usage of online shopping and comparison websites, all underpinned by internet safety.

Our work with Sanctuary Housing supported residents, support staff, and volunteers with digital skills training, developing skills, and reducing digital exclusion within the Sanctuary community.

Digital Inclusion through Assisted Digital

In 2023, our Assisted Digital programmes, which we delivered on behalf of HM Courts and Tribunals Service and the Home Office, provided essential support to 10,644 individuals, enabling them to successfully complete online forms. Our comprehensive assistance includes supporting individuals in collating the necessary information and documentation for online form submissions, filling in the online form (either by supporting the individual to type or by typing for them), reviewing the forms for accuracy, and ensuring successful and timely submission. As a result, 5,987 online forms were successfully submitted by the end of the individual's first Assisted Digital appointment with us.

Accommodating individuals' preferences and catering to convenience, we conducted 3,952 remote and 6,582 in-person appointments. The appointments enable thorough and accurate, right first time completion, review, and submission of forms whilst also enabling our trainers to establish a personal connection with individuals to genuinely comprehend their circumstances and motivations, and alleviate stress. A significant 65% of individuals reported reduced stress levels and improved mental health due to the relief they experienced after receiving our Assisted Digital support, with an overwhelming 89% attributing their successful outcome to our service.

We are seeing a rise in the need for assisted digital services due to poorly managed digital transformations, excessive automation, and limited human intervention options. This lack of support can lead to missed deadlines, payment arrears, and individuals feeling lost and out of control with nowhere to turn.

Digital Inclusion through Helplines

Our dedicated Helplines have been thoughtfully designed to offer convenient and accessible support to individuals without geographical constraints or personal limitations. Working with Lloyds Banking Group to deliver their Digital Helpline proved a lifeline for thousands who could not attend bank branches to manage their money during the COVID-19 pandemic.

Post-pandemic, the Digital Helpline has remained a popular service due to ongoing bank branch closures. The Digital Helpline teaches individuals how to set up devices, navigate the internet, use online banking, shop online, cyber safety and more.

Through a strategic collaboration with The Bread and Butter Thing and Lloyds Banking Group, we extended our outreach to provide digital guidance in low-income and local communities, providing digital skills to over 400 digitally excluded individuals.

What We Are Group would like to see from the Government.

- Enhanced Digital Literacy Programmes: More than 12.6 million people in the UK lack essential digital skills. The government should initiate and expand existing programmes to enhance digital literacy, particularly targeting the most vulnerable sections of society. The Government should also ensure that school-age children leave school with the necessary digital skills to succeed in life and at work.

- Investment in Digital Infrastructure: To achieve digital inclusion, the Government should invest in digital infrastructure, particularly in areas with poor internet connectivity. Rural communities are being left behind. Approximately 53% of rural premises in England cannot access a gigabit-capable broadband connection, and 55% cannot access full-fibre broadband. Improving infrastructure would enable more people to access digital services, create better connectivity for workplaces and education institutions, support the local business economy, and increase local communities' access to health and well-being services.
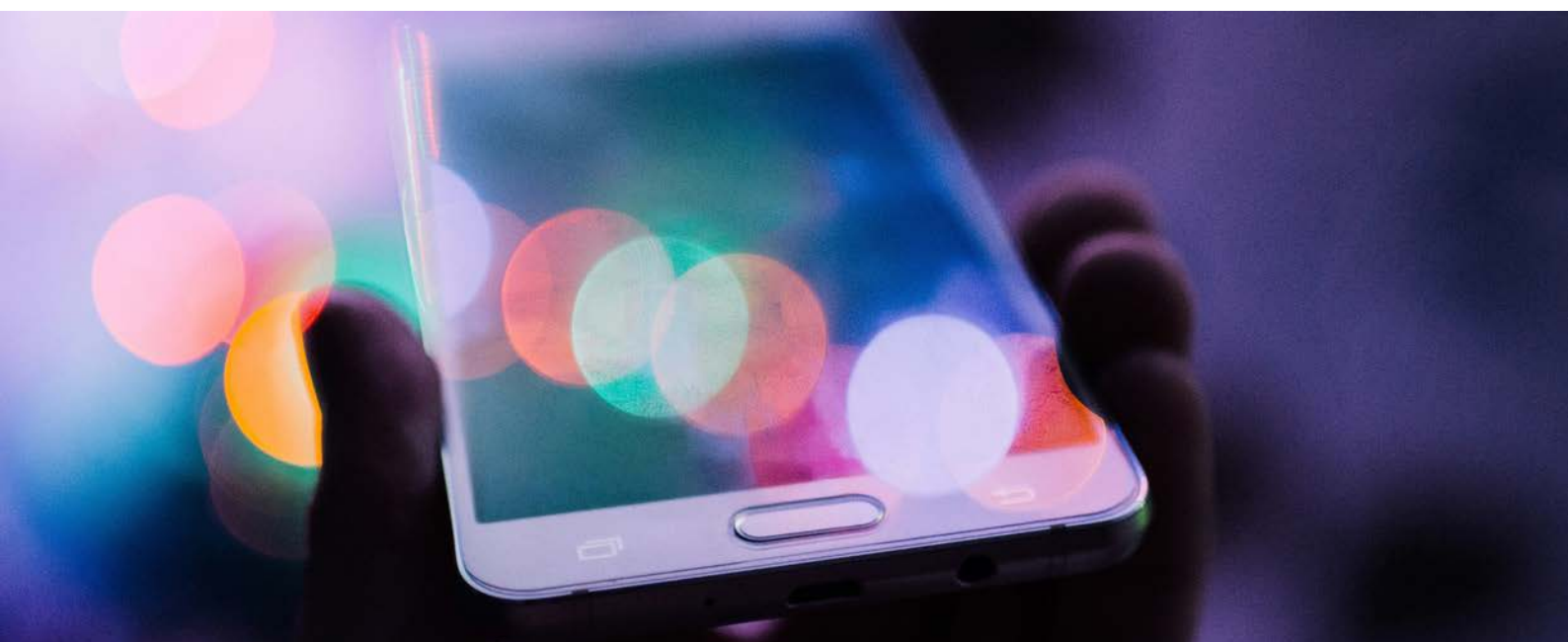
Minimum Digital Living Standard

Setting a Minimum Digital Living Standard

The Minimum Digital Living Standard, or MDLS, is a way of answering the question, "What do people in the UK need to be able to feel digitally included and take part in the world around them?"

MDLS is unique in the world in that it is:

- **bottom-up** - defined by members of the public through a structured, deliberative process

- **holistic** - across digital goods and services (devices, broadband, mobile) and practical skills (digital literacy) and critical understanding (media literacy); all are needed - in combination - for inclusion

- **household** - where other digital inequality measures focus on individuals.

Already developed for households with children, MDLS is now being extended to other household types:

- households with school-age children (already developed)

- single and couple working-age households with no school-age children (in progress)

- single and couple households of pension or retirement age (in progress).

Developing MDLS

The MDLS team is a collaboration between University of Liverpool, Loughborough University, Good Things Foundation and others, supported by the Nuffield Foundation, Nominet, Welsh Government, and Scottish Government. The team worked with members of the public to develop this definition:

A minimum digital standard of living includes having accessible internet, adequate equipment, and the skills and knowledge people need. It is about being able to communicate, connect and engage with opportunities safely and with confidence.

The team then uses a structured process with members of the public to arrive at a list of basic goods, services, and capabilities. Some households will have different needs or face additional barriers (e.g. related to disability, rurality, housing circumstances), but MDLS provides a starting point for thinking about needs, barriers to meeting needs, and how barriers can be overcome by families and by others with a role to play.

Stark inequalities across UK families

As the shift to digital service provision continues, this year's survey findings from the MDLS team are a stark reminder of the depth of digital inequalities between households.

Using the MDLS contents to develop a set of questions, we did a face-to-face survey of 1,582 households, generating data on 4,616 children and adults, to find out how many families meet or fall below the standard, and what affects this. This found:[74]

- **3.7 million households with children do not meet the Minimum Digital Living Standard.** This is 4 in 10 households with children in the UK today.

- **Poverty is a barrier to meeting the MDLS.** The main predictors of being below the MDLS are: low socio-economic status, living in a deprived area, being a single parent household, a household with more than 2 children, a household led by someone with disability and/or non-white ethnicity.

- **14% of households with children** do not have a parent who feels confident to use an online system to engage with their child's school.

- **27% of households with children** do not have a parent with the critical skills (media literacy) needed for understanding and managing digital risk.

These findings do not surprise given that nearly 3 in 10 children are in poverty in the UK.[75] They are deeply worrying in a country where digital access is widely accepted as essential for education and family life; and digital safety and wellbeing are major public concerns.

A framework for action

The MDLS gives us more than an evidence base for action. It is a framework which any organisation can use to assess their own roles - separately and collectively - in supporting households who fall below the benchmark.

A wide mix of stakeholder organisations are already engaging with MDLS findings and the framework - from user researchers in central government digital services teams, to CSR leads in businesses, to place-based networks with a focus on digital innovation, digital inclusion, or tackling poverty. Welsh Government has led the way in developing the Welsh Minimum Digital Living Standard and building this into policy. Scottish Government is following suit. Some local authorities are using MDLS to guide digital inclusion plans in their workforce and galvanise place-based partnership. There is interest from organisations in Australia, Canada, the USA, World Economic Forum and the United Nations Development Programme.

Ensuring all households can achieve a Minimum Digital Living Standard is not a task solely for Government. But the new Government does have a role in setting a vision of what good looks like. The Minimum Digital Living Standard could be that vision; a shared goal around which cross-sector stakeholders can join forces for change.

Prof. Simeon Yates (University of Liverpool) and Dr Emma Stone (Good Things Foundation)

To find out more or request a presentation, please contact: Professor Simeon Yates (simeon.yates@liverpool.ac.uk) and Dr Emma Stone (emma.stone@goodthingsfoundation.org).[76]

Digital Poverty Alliance

In 2024, not having access to digital services means not having access to the necessities of life. Health, education and skills, jobs and work, communication and benefits are all increasingly online by default and exclusion from the digital world amplifies inequality in all these areas.

With the high cost of living still putting pressure on households, many are still having to make difficult choices. In April 2024, Ofcom found that around one in ten households were struggling to afford basic connectivity (broadband and data). A study by the Digital Poverty Alliance and Deloitte in 2022 found that 13 – 19 million people experience at least one dimension of digital poverty.

2024: A Pivotal Year for Tackling Digital Poverty

The DPA has had a landmark year in 2024. We were proud to launch our updated National Delivery Plan in June (NDP), the DPA's roadmap for ending digital poverty, which will give targets to work towards over the next several years.

The NDP is split into four phases and contains plans to build on our delivery programmes, including:

- Tech4Families, which provides suitable devices to families in some of the UK's most digitally deprived areas.

- Tech4Youth, which has started providing laptops and skills workshops in North West Leicestershire.

- An individual device donation pilot in Ealing (with plans to expand to more areas), which distributes suitable devices to local people in need.

These projects are designed to gather data on how practical solutions to digital poverty can have a transformative effect on people's lives.

The NDP also lays out our advocacy framework, which will allow us to build relationships and call for practical and effective solutions to digital poverty. We also launched our Charter for Digital Inclusion in 2024, a call to action for organisations across all sectors to embed digital inclusivity into their daily operations.

What Do We Need Now?

We have identified practical policy solutions that will help close the digital divide. We are advocating for:

- A transparent and accountable cross-departmental government task force to deliver and implement a new digital poverty strategy.

- Increasing awareness of digital poverty – digital poverty still hasn't received the public attention it needs. Increasing awareness will increase pressure on government to act decisively.

- Improving signposting to support schemes – Many still aren't aware of the support that they can access. By identifying and signposting appropriate support schemes, we can provide immediate relief for households around the country.

Lightning Reach

Digital access is key for financial inclusion and resilience

Digitisation of financial support applications brings many benefits, including quicker, more secure processes, reduced perception of stigma and the ability to access support at a time and place that is convenient. However, the costs of data and devices (amongst other issues such as digital skills and confidence) can be a significant barrier to accessing support online. Awareness of social tariffs which reduce data costs in particular remains low, with only 5% of those eligible signed up.[77]

This means vulnerable individuals may face challenges accessing the support available to them, or incur further costs (e.g. printing and postage) in the process. For organisations, paper or phone based processes are slow and inefficient, reducing the number of people they can support with the same staff size.

Support to overcoming initial barriers to access

Lightning Reach has developed a financial support portal that provides personalised access to over 2500 grants, social tariffs and other support to individuals across the UK. The recently launched "apply on behalf" functionality was developed with input from the sector specifically to support digitally excluded individuals, allowing support workers to securely find support on behalf of their clients. This encourages the inclusion of digitally excluded individuals, ensuring they are able to access support that they are eligible for.
As well as finding general financial support, the portal also connects individuals to social tariffs and digital skills support, so they can get on the path to digital independence.
A fantastic example of this are Lightning Reach users, Elizabeth (62) and Michael (79), who improved their digital confidence through applying through Lightning Reach and were further offered computer skills training through the Vodafone Digital Skills Helpline and We Are Group (read their story here).

What's needed looking forward?

The Government must take action to improve access to social tariffs for broadband and mobile, ensuring these are made available by all providers and promoted through accessible, relevant channels through which individuals may seek support such as the Lightning Reach portal.

As not all individuals have access to a frontline support worker or digital support hub, resources should also be put into setting up a pilot grants programme for digital devices that individuals can apply for directly in a self-serve manner. This would complement the fantastic place-based work being done by the likes of The Good Things Foundation.

APLE Collective

APLE Collective (Addressing Poverty with Lived Experience) is a national collective of individuals and groups who have lived experience of poverty. We work with organisations that support us to take positive action to eradicate poverty. We are campaign partners with the Digital Inclusion APPG.

We live in a world that is increasingly dependent on technology, for some this has been positive and revolutionary, enabling people to connect, entertain themselves, pay bills and save time. But there are a significant minority of people who are not on line. Their connections, support and networks are significantly reduced. COVID-19 shone a light on the impact of digital disconnection, the Cost of Living Crisis has exacerbated this digital inequality and we at the APLE Collective are calling for the new Labour Government to listen to us and take action to address this issue.

APLE Collective members met recently to engage in a conversation (July 2024) in order to offer a case study response for the Digital Inclusion APPG.

We at the APLE collective have a responsibility to provide a medium to amplify the voices of people living in poverty and with that in mind, we ask that:

- The new government prioritise working with communities who are not connected via the internet at this time and consider working towards introducing fully accessible wi-fi for vulnerable low income groups coming out of this current crisis.

- The Digital Inclusion APPG Facilitate an opportunity for MPs and Business Leaders to discuss how people with lived experience of socio-economic disadvantage and who directly face this challenge of digital division are able to ensure support packages to build skills, knowledge and confidence are designed to best effect.

Improving both digital access and the skills to maximise its use holds the potential to have a life changing effect on people living poverty as well as the wider economy.

As part of our participatory conversations to answer these questions we discussed a range of policy levers and recommendations;

- Digital Training to support digital inclusion.

- Funding allocated to public libraries to allow people to access digital devices and get online in free public settings.

- There should be less barriers to public WiFi.

- DWP funded to offer Data and Digital Devices (e.g Laptops) to support low income job searchers

- Free WiFi / Data in public spaces such as Social Housing, Older peoples Homes and Hospitals.

- A charter could be signed by businesses to agree to invest in digital inclusion good practice. This could be linked to tax relief to big companies who provide free data.

- There should be lived experience voices on the policy making bodies within central and local government that design and deliver data and digital inclusion policies

Section Three:
Recommendations

The last time a national Digital Inclusion Strategy was published was 2014, over a decade ago. Given the rapidly-evolving nature of the issue, a new strategy is urgently needed to bring the Government's position up to date. While the strategy should be the responsibility of the Department for Science, Innovation and Technology, it should look to reflect digital inclusion's critical role underpinning the new Government's five missions, and be supported with the appropriate feed-in from other relevant Departments and regional and devolved authorities.

The below recommendations would form the basis of this overarching strategy, and reflect some of the most significant and impactful opportunities to create a long-term settlement for digital inclusion, that improves access, skills and engagement.

Recommendations

1. **Build on the creation of the cross-Ministerial working group on digital inclusion, to ensure digital inclusion policies are embedded across all Departments.**

   Following the Digital Inclusion APPG's recommendation in our last State of the Nation Report that a cross-departmental task force be commissioned by DSIT to bring different Government Departments together to focus on digital inclusion, the Government launched the cross-Whitehall ministerial group for digital inclusion.

   Now, as part of the new Government's Digital Inclusion Strategy, the taskforce should now be required to meet at regular intervals and agree targets for different Departments to meet.

   The taskforce should also be supported by an advisory body from industry, local, regional and devolved government, and the third sector – allowing them to contribute their expertise and feedback in an advisory capacity.

   Relevance to 5 missions
   The cross-Departmental nature of the working group means it holds the potential to play a critical role in facilitating dialogue between different areas of government, keeping DSIT's digital inclusion efforts consistently linked with the delivery of the Government's wider missions.

2. **Create a Digital and Social Inclusion Fund**

   VAT on broadband is charged at 20%, whereas for other goods and services deemed 'essential' it is charged at 5%. The Treasury should conduct a review into the costs and benefits of making broadband products 'essential', with social tariffs being brought into line and/ or the 15% 'extra' charged on all other broadband products (£2.1 bn a year) ring-fenced to help fund the Digital Inclusion Strategy

   Relevance to 5 missions
   The social inclusion fund will be allow for significant investment to unlock the economic potential of digital inclusion, as well as realising the benefits set out above to all five of the Government's missions.

3. **Develop a national digital inclusion forum with Ofcom**

   This forum would assist relevant bodies to develop and share best practice locally and nationally on digital inclusion solutions. It would provide a platform for collaboration between different levels of government and across geographies and jurisdictions, while providing an evidence-base for scalable solutions for the Government to implement nationally.

   Relevance to 5 missions
   The evidence accumulated by a national digital inclusion forum would play a vital role informing the progress of digital inclusion policies, and could be tied to all five of the Government's missions.

4. **Create a 'one-stop shop' digital inclusion support service for consumers, charities, and government agencies.**

   This platform would bring together pre-existing and future solutions to digital and data poverty in a single directory, able to clearly direct those in need to the support available to them.

   This would be accessible online at home for those with pre-existing internet access, and should be zero-rated to ensure it is available for those who have little or no data. It should also be made available to access in community spaces such as charities, foodbanks, libraries and job centres, and through private sector organisations on the high street. Funding for this service would come from the proposed Digital and Social Inclusion Fund.

   Relevance to 5 missions
   Whilst benefitting all five missions, a 'one-stop shop' for end users would be particularly impactful in breaking down barriers to opportunity, by providing a single, trusted resource through which the digitally excluded could access support.

   This in turn would have a positive economic affect and improve access to vital services such as the NHS, Universal Credit and jobseekers' support.

5. **Continue expanding access to social tariffs, data voucher schemes and other affordable internet schemes for those on eligible benefits.**

   DSIT and the Department for Work and Pensions should make better use of Ofcom data to support targeted interventions for those unable to afford internet connectivity, offering tailored solutions including social tariffs and data vouchers, or signposting to areas with free Wi-Fi.

   Relevance to 5 missions
   Social tariffs, data vouchers and other internet access schemes are a critical tool for assisting those on low-incomes to get online. This in turn would help unlock a series of social and economic benefits to drive the Government's five missions.

6. **Increase provision of internet connectivity in public spaces.**

   Publicly owned buildings and spaces should have free Wi-Fi provision for those who require it. Where not already implemented, this should include spaces such as government buildings, educational spaces, libraries, GP surgeries and hospitals, care homes, and other community spaces.

   Relevance to 5 missions
   As above, the public provision of internet is another important route to supporting people online, and accessing the individual and collective benefits available via the internet.

7. **Expand the number of zero-rated websites, including all online government services**

Websites for essential services, including accessing government, NHS, certified educational services, debt advice and the proposed digital inclusion 'one-stop-shop' should be zero-rated. A Private Members Bill to legislate for zero rating was introduced in the last Parliament but curtailed by the general election – the Government should look into reviving this.

Relevance to 5 missions
By enabling free access to vital services on any devices, access to public services such as the NHS becomes more equitable – providing greater opportunity for individuals and relieving pressure on organisations and services.

8. **A digital 'right-of-way' to public services and other essential services provided through the private sector, starting with the NHS and Universal Credit.**

As part of a new mandate to design digital public services in a way that meets the needs of all citizens, relevant departments should ensure public bodies (such as NHS providers and schools) ensure a digital 'right-of-way' solution so that users experiencing data poverty can still access digital-only services. Of most pressing importance would be creating this right of way for Universal Credit claimants and NHS patients with online records.

Relevance to 5 missions
Modernised and digitised public service provision from organisations such as the NHS will need to ensure that access is possible and equitable for all its users.

9. **Convene regional learnings for a national framework**

The Government should consult with devolved and regional authorities on how a national digital inclusion framework might scale up local and devolved programmes as well as cater for regional and national differences.

Relevance to 5 missions
The Government's five missions are to be delivered in partnership with local, regional and devolved authorities around the UK. For digital inclusion policies to effectively support the missions, they too will require co-designing with other UK administrations.

10. **Donate used Government devices to the National Databank**

The Government should mandate that all old and unused technology are wiped and donated to Good Things Foundation's National Device Bank, so that they can be used to support people across the country in getting online.

Relevance to 5 missions
Device access breaks down barriers to opportunity by allowing more people to get online and access the benefits of the internet. By donating old devices, the Government will also be able to cut down on e-waste and support the environment.

11. **Review the digital switchover TV to provide digital connectivity to households**

The Department for Culture, Media and Sport should undertake a review into what policy interventions are required to ensure the switchover to digital from satellite television is also used to boost digital inclusion.

Relevance to 5 missions
Recognition of the digital switchover in TV's potential to bring internet access to households who otherwise wouldn't have the motivation or opportunity to get broadband, marks a huge chance to break down barriers to opportunity amongst these groups.

12. **Invest in Digital Skills Provision**

Existing digital skills programmes, such as the EDS Entitlement and EDS Qualifications in England should be scaled up, and support offered to all public sector staff. Essential digital skills support should be offered for jobseekers, allowing them to access a full range of services and opportunities while unemployed.

Relevance to 5 missions
This will directly support the Government's opportunities mission, while supporting economic inclusion and development.

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