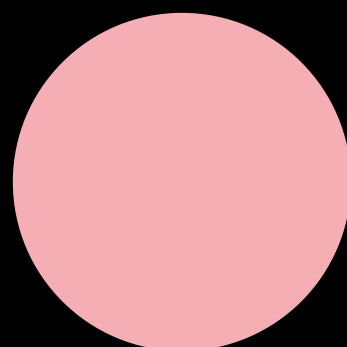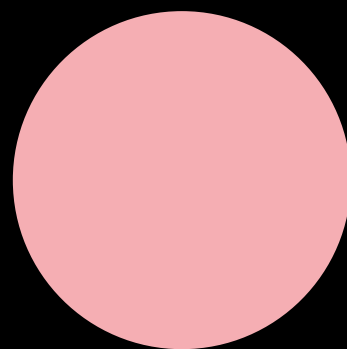30 October 2020

Digital Exclusion Research 2020

Understanding the impact of Covid-19 on digital exclusion

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1.   Broadband Stakeholder Group foreword

1.1.   Context

As we move into a second phase of the Covid-19 pandemic it is hard to conceive of a more relevant juncture in which to ask why, in late 2020, nearly 7% of the UK population is almost completely offline, and more than double that number lack relevant, basic, digital skills. All of this against a backdrop in which those who are online are gaining, whether by necessity or by choice, a degree of digitally dexterity through use of virtual platforms such as Zoom or Facebook: for many in this cohort, the pandemic has acted an incubator for digital skills.

With this in mind, the Broadband Stakeholder Group wanted to explore the correlation between the digital attitudes, aptitudes and appetites of a small sample of the UK population towards digital connectivity. Two years after our original digital exclusion research project begun (with the report being published in 2019), we commissioned Savanta ComRes to look once again at the current, lived experience of thirty individuals during the late summer of the pandemic. Reflective of the nature and composition of these audiences, respondents were largely drawn from less affluent socio-economic backgrounds and split equally between: the digitally excluded (no internet connection / functionality at home or on a mobile device); existing online adopters (online in the past 7 to 18 months, and are using new services as a result of Covid-19); and recent online adopters (online in past 6 months as a result of Covid-19).

1.2.   The 2020 research

The qualitative in-depth telephone interviews, undertaken between August and September 2020, revealed a number of archetypal personas including single parents, the elderly and those living alone. However, it remains, that there are many different situations and personas which intersect with digital exclusion.

The research highlighted the following findings:

- Internet adoption was predominantly driven by social needs during lockdown restrictions and the physical separation from family and friends; with entertainment or online shopping purposes being more secondary drivers and benefits
- Concerns surrounding the benefit and value of digital connectivity and a lack of digital skills were key contributors to digital exclusion, with responders citing an inability to decipher the steps to go online or build the digital literacy skills required. These barriers were amplified by attitudinal factors which related to a perceived lack of need for digital connectivity, with some respondents not seeing the benefits of learning digital literacy skills to enable them to use the internet.
- Respondents cited the negative aspects of being online, such as the 'keyboard warrior syndrome' linked to the rudeness of people who are compulsively wedded to their digital devices, as a reason for not adopting digital skills during lockdown. However, for some parents, digital literacy was required for their children's educational needs to do online classes and homework, and digital devices attractive for gaming.
- On a more positive front, fears around scamming, digital fraud, and identify theft that online adopters held prior to going online have proved to have been unfounded, prompting many to be grateful that they had developed digital literacy skills.

In summary, for the digitally excluded, the BSG-Savanta ComRes research suggests the pandemic hasn't fundamentally shifted underlying attitudes towards digital connectivity and encouraging movement away from an "analogue" life. In many instances quite the reverse is true. The perceived "lack of need" in the 2019 research is now conflated with some fervent and emotive

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views around both the pervasiveness of digital devices in society, and the "nastiness" of social media. The internet is not, as we would believe, "an unashamed good" for all. Moreover, this view is not yet mitigated by any compelling internet use-case, perhaps largely due to the support of family networks, for older participants, catering for any online requirements.

This latter point is underlined by the fact that the digitally excluded are rarely socially excluded, this comment being typical of many; "I have got a brilliant network where I live, because I've lived here for 39 years and I call them my comfort blanket".   There were a number comments that reflected that the status-quo was just fine, illustrated by, "I'm just happy what doing what I do" and " I don't think there is any benefit for me". This does not mean that these respondents lack awareness of the benefits for others, or that online services are becoming an inevitability (e.g. due to the closure of banks and post-offices). But these online developments are viewed with a degree of irritation rather than being immediately consequential.

There was however a definite correlation between the perceived lack of benefits of being online and the level of resistance to acquiring digital skills. Views were expressed that adopting the internet is simply not worth the hassle, given they need to put in a significant amount of effort for what is perceived to be a minimal gain. This contrasts with the experience of those who adopted the internet during the pandemic, who largely found the experience to be more straightforward than they had anticipated, and often "had their eyes opened". Many recent and existing online adopters also realised that they could do much more than they anticipated without help, increasing both feelings of confidence, competence and connectedness.

It should also be noted that the experience of online adopters (both existing and recent) has been positive on the whole; with a broad consensus of participants wishing they had gone online earlier and would recommend other individuals to do so. As per the previous themes, the report suggests that one of the key challenges or barriers to overcome is the internet being perceived as an 'experienced good'; in that individuals are only able to see and articulate the benefits of digital connectivity once have some experience of the internet.

1.3.   Final thoughts

Clare MacNamara, CEO of BSG, said: "This report illustrates how varied the lived experience of our respondents has been during the late summer of the pandemic. It has highlighted some of the reasoning behind why some people are still choosing not to move online whilst others have been coaxed, cajoled or coached online by friends and family. It also raises the question of what the overarching policy goals should be for the digitally excluded for whom the digital divide has become further widened as those online gain greater digital dexterity and economic gains".

Covid-19 has, however, helped "nudge" a number of internet sceptics into reluctant adopters, mostly via online platforms for social engagement and limited online shopping whilst "bricks and mortar" and face-to-face contact are out of bounds. Whilst accepting the usefulness and practical reasons for being online, it is still the case that for many, they hope to return to a largely analogue life. This is in fairly stark contrast to those for whom the internet has been a lifeline during the pandemic.

It is also clear that the internet is an 'experienced good' which can only be accessed with core digital skills, and with the financial means. However, industry and government stakeholders also need to consider how best to tackle digital inclusion for all those for whom an offline life is still a preferred lifestyle choice. An exclusively "analogue" existence will no longer be an option post-

2025 when fixed telephony becomes digital. BSG is working with its stakeholders to address all of these implications".[1]

2. Research background

2.1. Research aims & objectives

In our 2019 report on digital exclusion, we highlighted that the internet has been rapidly adopted over the course of the 21st century, with the vast majority of UK citizens now connected. Day-to-day life has increasingly been digitised, with online services from business and local authorities becoming more widely offered and used. Technology companies are also dominating the global economy more than ever before: the most valuable companies in the world in the 2nd quarter of 2020 were all technology or E-commerce businesses.

Against this backdrop, there remains a significant minority of UK citizens who are excluded from digital life. 3.6 million individuals – around 7% of the population – are almost completely offline, whilst 11.7 million lack the skills needed for everyday life[2]. Digital exclusion is therefore not just a matter of having a connection, but also of having the skills needed to participate in a digital society.

The Covid-19 pandemic has added an unexpected twist to this issue, and in many ways has accelerated the digitalisation of society as lockdowns have forced the majority of in-person activities to stop. Even now as we emerge from the first wave of the virus, technology is being used to halt its spread in the form of phone apps or QR code scanning to register details, as an example. This has deepened the digital divide and has been associated with unequal access to the likes of education[3] and healthcare[4].

In the context of the longstanding issue of digital exclusion, and in-light of Covid-19, Broadband Stakeholder Group (BSG), in collaboration with Savanta ComRes, undertook primary research in order to understand the lived experience of those with no access (digitally excluded), or those who have recently gone online (online adopters), and in particular, the impact Covid-19 has had on their digital behaviour, if any. We explored their life without the internet, as well as the experience of those who have recently been connected, with the aim of understanding the pros and cons that a more digitally connected life might have.

The report aims to uncover this lived experienced, understand behaviour change, what barriers to going online still exist, understand how the expectations of going online might have differed from reality; whilst also making recommendations for how to tackle the problem of digital exclusion in a context where ever-deeper connection appears inevitable.

[1] Between now and 2025 the telephone providers are upgrading the traditional analogue landline network (PSTN) to a digital one where voice will be carried over an IP network.

[2] Lloyds Bank UK Consumer Digital Index 2020: https://www.lloydsbank.com/assets/media/pdfs/banking_with_us/whats-happening/lb-consumer-digital-index-2020-report.pdf

[3] University of Cambridge: https://www.cam.ac.uk/stories/digitaldivide

[4] The Lancet: https://www.thelancet.com/journals/landig/article/PIIS2589-7500(20)30169-2/fulltext

2.2   Audience definitions

To understand a broad spectrum of experience, and make comparisons to the 2019 research where appropriate, the research was conducted across three key audiences:

Digitally excluded (10 interviews):
Those who **do not** have an internet connection set up at home or on a mobile device, or who have access but **don't use** internet functionality (e.g. could access the internet via a smartphone, but choose specifically not to).

Existing online adopters (10 interviews):
Those who have been accessing the internet – either though home broadband or a mobile device – for the last **7 to 18 months** and were previously digitally excluded. They also must have been using **new internet services** as a result of the **Covid-19 pandemic in the last 6 months** (March onwards).

Recent online adopters (10 interviews):
Those who have been accessing the internet – either though home broadband or a mobile device – **since the Covid-19 lockdown** (March onwards) and were previously digitally excluded.

2.3   Methodology

To gain a rich insight into the experience of digital exclusion and internet adoption, in-depth interviews were selected as the most appropriate methodology.

A **total of 30 interviews** were conducted, with 10 in each audience type (digitally excluded, existing online adopters and recent online adopters). Interviews were designed to be approximately 30 minutes in length and conducted via the telephone.

Owing to the natural profiles of the target audiences (and a propensity to be older and / or located in certain regions of the UK) the research was not designed to be representative of the UK population, instead we looked to speak to a range of relevant individuals across gender, ages and regions.

Fieldwork dates	Gender	Age range	Regions
Fieldwork was conducted during mid-August to mid-September	10 - male 20 - female	5 - aged 20 to 35 15 - aged 36 to 65 10 - aged 66 plus	Interviews were conducted across Southern England (5), the Southwest (3), the Southeast (3), London (5), the North (3), the Northwest (6), Northern Ireland (4) & Scotland (1)

3. Lived experience & impact of Covid-19

3.1. The lived experience of digital exclusion

Across all groups, participants tended to be less socioeconomically affluent, with a high prevalence of jobs such as taxi drivers, shop assistants, cleaners and hairdressers. Participants also typically stayed in these roles for long periods of their lives, rather than having multiple career changes. Life goals and priorities often revolved around ensuring bills and mortgages were paid, with little extra disposable income beyond this.

"I have to pay for my taxi, I have to pay my mortgage, I have to pay my bills"
(Recent online adopter; male, 36-65, Northern Ireland)

Financial hardship was mentioned as one of the major consequences of the pandemic, as we will explore later in the report. In contrast, other participants pointed out that they were slightly better off than before Covid-19, given that the lockdown had reduced costs such as a travel and non-essential shopping.

Amongst all the audiences, three archetypal personas emerged: single parents, the elderly and those living alone. Due to the limited nature of the sample, the suggestion here is not that individuals who lack internet access or have only recently acquired it will fall into these categories. However, amongst our sample, we saw a significant number of participants who came under these banners.

Crucially, those in these living situations often had priorities and difficulties that were specific to their group, which also compounded the effects of full or partial digital exclusion.

Single parents
- Life centred around childcare responsibilities, leaving little time for leisure / relaxation
- Particularly the case when children are pre-school age
- Often heavily reliant on family / friend / neighbour support network

The elderly
- Tend to have been retired for a number of years
- Reliant on carers – often through family visits
- Dependent on family / friends for mobility, for instance being driven to go shopping or socialise
- Social life can be quite active, but usually local and routine

Those living alone
- Divorced, widowed or single by choice
- Tend to engage in activities to keep them occupied e.g. listening to the radio all day, or having the TV on for company
- Found lockdown more difficult than the other audiences

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The digitally excluded are rarely socially excluded, with a high proportion engaging with a tight-knit social circle living nearby. For many, this comes as a result of growing up and staying in the same area, resulting in a rich network of long-standing connections.

"I've got a brilliant network… where I live, because I've lived here for 39 years and I call them my comfort blanket"
(Recent online adopter; female, 36-65, South East)

Entire family units that have stayed close together geographically and emotionally are also common, with an emphasis on regular and routine interaction. This is particularly true for those who rely on family for childcare responsibilities, or those who require care or care for others themselves. For example, one participant is a full-time carer for her parents, meaning that she would see her family every day and "*for large portions of the day*" (Existing online adopter; female, 36-65, Northern Ireland).

Older participants were also more likely to rely on family to help them even if they were living independently:

"If I was going over to my younger sons, I would be picked up, because they both drive. They've come and pick me up and bring me back home again"
(Digitally excluded; female, 66+, South West)

Whilst friends were seen less regularly than family overall, many participants had a close circle of friends who they saw on a regular basis.

"After the children were dropped to school I would have went for coffee with friends. Because I work in the middle of the day at lunchtime I would see them in the morning and then I would go to work and then I would come home and tidy up for an hour before I had to go back and pick up from school. So I would have been very sociable"
(Digitally excluded; female, 20-35, Northern Ireland)

However, there were exceptions, with some participants being socially isolated. One participant had moved from central Africa to London approximately five years ago and had struggled to make connections whilst living in the UK. He was reliant on the small amount of close family that had moved with him and had tried to get to know people at a local church. He found this difficult and is now looking to complete language courses to have a better chance at making social connections. He is a musician and would like to "*get in contact with other people doing the same thing*" (Recent online adopter; male, aged 65+, London).

The example of those who have moved into a new country or area struggling with social connections further demonstrates the importance of locality for those with limited or no access to the internet. Online access (via smartphone or a dedicated connection) can foster connectivity by providing a bridge to keep in touch with family and friends elsewhere and a mechanism through which to engage with likeminded people in an individual's current locality.

3.2   Leisure & hobbies before Covid-19

The kind of activities that participants undertook in their free time hugely depended on the amount of free time that they had. A standout group which barely had any free time at all were parents, particularly single parents, whose lives were based almost entirely around childcare responsibilities. Single parents rarely get a moment to themselves, and their choices of activities are dictated by their children:
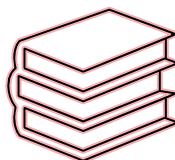
"We normally just get up and then we tend to do painting, things like that, with them. And if I have to go shopping then I go shopping about lunchtime, go back home, do some more stuff with them. If they want to sit and watch a film then they sit and watch a film"
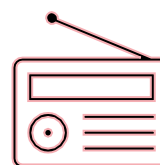(Existing online adopter; female, 20-35, South)

When looking at the consumption of entertainment and media, the top three formats accessed amongst <u>all</u> participants were:
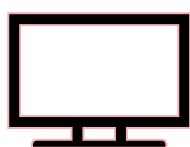
**Television
(20 mentions)**   **Books /
Literature
(9 mentions)**   **Radio
(9 mentions)**

Those who were digitally excluded typically expressed interest in more traditional media formats; television (8 mentions), books / literature (4 mentions), and radio (4 mentions) were the most common media formats accessed. However, participants rarely identified themselves as regular television watchers, perhaps suggesting digitally excluded people are unlikely to adopt other forms of technology beyond the internet or favour a life without distractions / noise.

Amongst online adopters, streaming / catch-up services (8 mentions) were the second most popular form of entertainment platform; behind the television only (12 mentions). Online adopters used media such as TV or radio more regularly, but often as a form of company or to simply have on in the background. This was particularly true of those who were more socially isolated, or spent large portions of time on their own:

"I have the radio on all day long while I'm driving"
(Digitally excluded; male, 36-65, North West)

"It's [the TV] just a bit of noise, a bit of company I suppose"
(Existing online adopter; female, 36-65, Northern Ireland)

Across both the digitally excluded and those who had adopted the internet, it was relatively rare to identify as avid consumers of television. This was the main reason that catch-up services tended not to appeal massively across all three groups – there was enough choice amongst the existing set of channels to keep them entertained. Some also expressed that they

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were used to the routine of switching on their television for certain programmes or at particular times:

> *"I suppose I'm so used to putting the TV on and sitting down and watching shows at certain times. It's part of the routine"*
> (Recent online adopter; male, 20-35, South)

A small subset of participants expressed an early interest in catch-up services, and even cited this as one of the main reasons that they wanted to connect to the internet in the first place. However, this was only the case for those that were already watching more television than the average participant, suggesting that initial demand for catch up services is driven by a pre-existing desire for a greater range of content.

However, a number of recent and existing online adopters went on to use services such as BBC iPlayer and Netflix, although this was not a key driver for going online in the first place. This was often because of friends / relatives, either in the form of suggestions of things to watch or through them actually installing the services on their behalf. For those with children, these services also provide a wealth of options for entertaining children and ease the pressure on parents.

> *"I watch catch-up TV. I have got Netflix. My grandson put it on my TV. He came round here once and wanted to watch something on Netflix and I didn't have it"*
> (Existing online adopter; female, 36-65, South East)

These motivations may have also been influenced by lockdown:

> *"I've connected to Netflix. I'm addicted to Once Upon a Time, which I probably would have never have watched before. You know, it's just different things come up and you think oh... it was my daughter that pushed me to that because she said, 'Mum, you're going to be bored, you're going to need something, there's so many things on there you can watch"*
> (Existing online adopter; female, 36-65, North West)

Participants generally conceptualised catch-up services (e.g. BBC iPlayer) and subscription-based streaming services (e.g. Netflix, Amazon Prime) as the same format, and they were usually described together as alternatives to traditional TV viewing. This being said, these services were typically accessed on smart TV devices (as opposed to laptops or mobile devices), suggesting that they were still used in a setting and context that resembled traditional TV viewing.

In terms of specific catch-up and steaming service platforms, Netflix was the most mentioned. Amazon Prime, BBC iPlayer and the ITV Hub were all secondary mentions that came up multiple times. In addition, those that use both catch-up and streaming services tended to suggest that they were more likely to use streaming:

> *"I can get it, but I don't do iPlayer very much"*
> (Existing online adopter; female, 35-65, South East)

The fact that broadcasters' catch-up services were less influential in driving new online activity perhaps seems counterintuitive given that participants generally expressed that they weren't looking for more TV choice, which Netflix and other streaming service providers offer. Catch-up services might therefore seem like a more likely gateway into the world of internet-enabled television given that users are able to access the same content but on-demand. On-demand

services are also provided by traditional TV networks (i.e. BBC and ITV), arguably making them more familiar and trustworthy.

The reason that streaming was more popular in spite of this seems to be that many participants didn't actively seek either type of service – but instead were introduced by friends and family. Most typically, those introducing them to such services were typically younger (children, nephews and nieces, for example), and Netflix was often the key service that they recommended or installed on their behalf. Given that many participants then enjoyed using streaming services more than they had expected to, they got locked into using these, without the need to catch-up on missed television.

Those that have used these services recently have found them to be high quality and more entertaining than they expected. This audience also tend to still use traditional television to some extent, suggesting that the introduction of catch-up services has increased their overall time spent watching television, rather than completely diverting their attention

One purpose for which participants relied on traditional TV was news consumption. Digitally excluded participants generally wanted to stay informed about news and current affairs, though often didn't see the need to use the internet to access this kind of content.

"I like to listen to the news to see what's going on"
(Digitally excluded; female, 66+, South East)

" I watched the news – probably once a day on the telly"
(Digitally excluded; male, 36-65, North West)

For those that were most sceptical about the internet / going online, reading the news was also often cited as one activity that would potentially be appealing. This was partly because the news was differentiated from other activities given that it was:

a) Something that participants consumed already, and is therefore familiar and also part of their daily routine

"I tend to watch the news once a day on the telly. And listen to it numerous times on the radio throughout the day, so, pretty up-to-date on current affairs"

(Digitally excluded; male, 36-65, North West)

b) Seen as useful and productive, rather than just for entertainment value or somehow unimportant

"I like to listen to the news to see what's going on"

(Digitally excluded; female, 66+, South West)

3.3 Internet usage & the impact of Covid-19 on the lived experience

Our interviews with existing online adopters (i.e. those who have adopted the internet within the past 7 to 18 months) suggests that, even in a relatively short space of time, engaging in online behaviour shifts the daily lived experience of individuals significantly. Those who had been using the internet for between 7 to 18 months suggested that internet usage had become a daily part of their lives, with some suggesting they engage in two or more hours of internet activity per day just for personal use. Interestingly, there didn't seem to be any difference between existing adopters and those who had recently started using the internet (i.e. within the last 6 months or since Covid-19), with many recent adopters also suggesting the internet had become a daily part of their routine.

> *"When I'm receiving messages on WhatsApp, it will vary but I would say some days are busier than others but mostly in the evening I would definitely be using WhatsApp, at least with my family... It can take one hour easily, the time for me to speak with my birth relatives. Sometimes it's just a quick message, but when it is a call it can be long to talk with everyone. Not every day, but some days it can be one hour a call"*
> (Recent online adopter; male, 36-65, London)

Internet usage varied depending on the type of devices participants were using. For example, those who were using desktop devices tended to go on the internet in single 'sessions' before logging off. In contrast, smartphones and tablets were used much more 'as and when', particularly if participants were using social functions such as WhatsApp, where messages are instantaneous.

Internet usage times also tended to frame the daily routine, with online adopters typically saying they were most likely to log in either first thing in the morning or last thing at night. Again, these different routines depended slightly on device and usage types:

Morning users:

- Tend to be on mobile devices, with the ability to check 'as and when'
- Using communicative services such as emails or messaging services (i.e. WhatsApp) – they are actively checking whether any new messages have come in

Evening users:

- Tend to be using desktop or fixed devices (e.g. smart TV), where there is a single or defined session of use
- This is most likely to be when participants have free time, particularly around other responsibilities such as work and looking after children
- Internet is predominantly used for entertainment during these hours e.g. for watching TV, looking at internet shopping, as well as for using more communicative functions such as Facebook.

Covid-19 also had a significant impact on the types of activities that online adopters were participating in, with most who have had the internet for more than 6 months saying that their habits changed over lockdown. The pandemic has provided a chance for some to explore the more practical benefits of the internet, such as shopping for food online. In general, shopping

transitioned from a fairly mindless essential task, to something far more planned and deliberate. For example, participants almost universally mentioned being wary of physically going to the shops, given this was one of the few contact points with the virus during lockdown.

Mitigation strategies for dealing with shopping risk varied between different groups of participants. However, an obvious differentiator was age and frailty. Older and more vulnerable individuals often stopped shopping for themselves, with family or friends doing so on their behalf.

"It's very rare I go out shopping myself, even now [restrictions have lifted]. Only for milk and things like that, I don't do a big shop"
(Digitally excluded; female, 66+, South West)

"I have got friends who take me shopping. I don't put myself at risk though. I don't go where there are loads and loads and loads of people. They take me when it's more quiet, maybe of an evening or something like that when it's not so busy because I'm exempt from wearing a face mask so that's another thing that I couldn't go out when there's a lot of people"
(Existing online adopter; female, 36-65, South East)

In contrast, those with access to the internet explored online food shopping, even though this wasn't a main motivation for adopting the internet in the first place. Across all three audiences, there was a general suspicion of online shopping for items such as clothes, with participants expressing that they preferred the tactile experience of in-store shopping, as well as the sense that 'you know what you're getting'. However, food shopping was seen as more appealing given there is less of a need to see what you're buying first – for example, many food items come in standardised sizes. However, participants still mentioned that they had reservations about online food shopping before trying it for the first time, also suggesting that the pandemic had forced them to face their fears.

"Online shopping for example, if it wasn't for Covid I'm not sure I would have ever started shopping online. I'm happy now that I'm doing that, but back then I really didn't have the need for that. I was happy living like that, the way I did before, so I didn't realise that I was actually falling behind with some people at work telling me. It's when you start that you really realise how helpful some things can be"
(Existing online adopter; male, 36-65, London)

"I tend to do the shopping online just to keep the kids at home"
(Existing online adopter; female, 36-65, North West)

It should be noted that those who had recently started online shopping continued to suggest that they would prefer in-person shopping, however, there was little evidence to suggest that participants had switched back to 'bricks and motor' shops since lockdown had been eased. This may tentatively imply that the convenience benefits of online shopping often go some way in making up for the lack of in-person shopping experience.

"If you do shopping at some supermarket where it's £40, they deliver it for free to your doorstep. When you shop yourself for £40, first it takes your time to get there, to shop. Second, it's heavy to carry. Are you going to take that to the bus or walking? It can make life easier"
(Recent online adopter; female, 66+, North)

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"It just takes away all the hassle of things like shopping and banking and things like that, you know, it's really made a difference. Especially with the disability, it's made such a difference"
(Existing online adopter; female, 20-35, South West)

Video calling platforms such as Zoom and FaceTime were also heavily adopted throughout lockdown. Video calls were not something that most adopters had used before, and those that had previously used these features found themselves using them much more frequently during lockdown. Participation was often encouraged by family members, with regular events and calls taking place:

"The biggest thing I would say, and it's worth me joining the Internet, is the Zoom. What we've been having on the Saturday with the family, there's been as many as 25. We've had quizzes and fancy dress, we've had all sorts, but always including alcohol, so you're having a few drinks and having a good laugh and I swear that's what it's all about"
(Existing online adopter; male, 66+, North West)

Most participants were cautiously optimistic that they would continue to use the internet more in the future. For example, using the internet on a more regular basis had eased the minds of many, who were perhaps more tentative before lockdown. The phenomenon of becoming more comfortable with the internet over time was related to digital skills and confidence, with participants expressing a fear of not understanding how to use the functionality of the internet, or making mistakes that would be difficult to fix. Using the internet eased these worries as participants suggested that the internet was more straightforward to use than they had originally anticipated, whilst their skills had grown at the same time.

"Because it's much easier than I thought and it can be very helpful. Especially if you want to know how to get somewhere or something like that or just want to look at the local news or even the weather. Things like that. It is so easy. Which I probably didn't think it would be"
(Existing online adopter; female, 36-65, South East)

Ease of use was highly related to how valuable participants perceived the internet to be, as it was part of the cost benefit analysis of whether they wanted to adopt. Many digitally excluded participants expressed that they didn't think they ever would be able to learn how to access and use the internet, and so the benefits of the internet would always be out of reach.

"If I could learn, if somebody could teach me, you know, the very basics and let me go from there. But I wouldn't even know how to plug in a laptop or something, I would not know how to do it. I would not know where you start... so, I need somebody to show me from the very, very beginning, and I don't think there's anybody going to show me that"
(Digitally excluded; female, 36-65, Scotland)

However, Covid-19 may have accelerated the digital skills of those who have adopted the internet due to individuals having more time to spend on learning how to use various functionalities:

"It also gave me the time to learn, because the way I was busy before Covid-19, sometimes if I wanted something I would just have to ask someone to do it for me, thinking it would it be faster that way. Well, I had more time during Covid-19, during the lockdown, to actually learn and do all of that stuff"
(Existing online adopter; male, 36-65, London)

However, participants also suggested that as we emerge from Covid-19, they would like to regain some aspects of their analogue lives, with digital perhaps not being as important. This was particularly true with socialising digitally, which was felt to be a good stand in for real-life socialising, but not a replacement. This was most true of those who had a strong network of friends and family living locally, for whom video calling was beginning to be less of a necessity as lockdowns were eased. In contrast, those with relatives or friends living far away or even abroad suggested that they were likely to continue using social platforms in an effort to keep in contact.

"It helps to connect people, that's probably good. But, you know, I still think you're probably better off doing things in person, in my opinion anyway. But, if it helps connect people who are far apart, I suppose it's a good thing"
(Recent online adopter; male, 20-35, South)

"I learn every day. Even my grandkids will be showing me stuff, and I'm talking seven and eight years old. 'Get on this WhatsApp, Granddad, and we'll do this, we'll do that, and be able to FaceTime you and this and that.' 'Oh right, okay, alright.' It's the future, isn't it? I must admit, it really is… for the amount of time that I've had one now, I'd find it very, very difficult to do without"
(Existing online adopter; male, 66+, North West)

4. UK as a digital society

4.1. Attitudes on the UK becoming more digitally connected

There was general agreement that UK society has become more digitally connected in recent years (prior to Covid-19). This was experienced through the observation of others, for example, noticing that other people are using phones much more often when they are out and about. Equally, it has also been experienced through participants' interactions with authorities, shops and services, particularly as cash has become slowly phased out and consumers are invited to conduct more and more of their activities digitally and / or online.

Attitudes towards the increasing role of digital connectivity in society were mixed, with many acknowledging that the topic is complex and there are both good and bad elements to the debate. However, in general, the digitally excluded were more likely to mention the negative aspects of the internet, drawing particularly on observations of others given their more limited experience. The concerns shared by digital adopters were broadly similar, but struck a slightly more optimistic note, or at least, suggested that the internet had some positives.

In addition, the digital adopters tended to take the attitude that the internet may in fact work well for other people, even if they themselves are perhaps slightly reluctant to use it or have been slow in their uptake. In contrast, the digitally excluded tended to suggest that the internet was negative for all, and that those who enjoyed using it were in some way deceiving themselves or had become too influenced by it.

"It just seems that nastiness comes out in a lot of people with it [the internet]... and you just think, would you really do that to someone face-to-face?"
(Digitally excluded; female, 66+, North West)

"It seems to have taken over a lot of people's lives. I see it when I'm out, people on the phone or on the internet all the time which I find very rude. I don't agree with that"
(Digitally excluded; male 36-65, North West)

Overall, participants described a marked split whereby the internet was a positive force when being used for 'functional' and 'practical' applications, but a negative force when being used for 'pointless' or 'unnecessary' activity. For many, this divide fell along the lines of the overuse of social media, which was perceived to be dominating people's lives and distracting them from the real world. In contrast, practical tasks such as reading the news or looking up the weather forecast were seen to be useful additions to a primarily offline or 'analogue' life. In an ideal world, participants wanted the internet to be a tool for enhancing their lives whilst leaving most things intact, and not detracting from any aspects of their 'real lives'.

"It's good for the UK as a whole, I suppose, because they need to keep up with the times but I think it's a bad thing for young people... I don't feel as though young people interact as much with each other, and they need to. I mean, everybody's trying to find a partner online. Do you know what I mean? They're trying to match people, and opposites attract. Even with kids going out to play, you know, you're all online with each other. They're not out playing, no. So, I think it's a good thing, as a whole, for the UK, probably for business reasons but I think it's a bad thing for social reasons"
(Digitally excluded; female, 36-65, Scotland)

"I do not believe children should have these iPhones, it's good that they know these things, but I don't think they should be taught so much so early. I mean, I've got four great-grandchildren and three of them have their own little phones that they talk to on it and I think it's so wrong"
(Digitally excluded; female, 66+, South)

"I think it has it's good points, but I also think it has it's bad points. I think, especially for young people, they don't get out and meet that often. They seem to do everything on social media, and then some people live their lives on social media. I don't think that's a particularly good thing"
(Existing online adopter; female, 36-65, South East)

For internet adopters, their impressions of the positive aspects of the internet were often informed by their own experiences of useful tasks that they had been able to perform on the internet:

"I get my tablet, like for instance last week, I was looking at breakdown insurance, and just decided to go on, and when you look at these other sites, you're saving money. You are literally saving money, so it's a great thing"
(Existing online adopter; male, 66+, North West)

"It makes me more independent because, before, I had to rely on others for small things, I could not do anything by myself. Now there are many things that I can do by myself. I feel more independent and I feel more connected to the world"
(Recent online adopter; female, 36-65, London)

"So we got the internet connected up to the house and that's been really good because it's introduced other things like this Alexa, I had a new boiler fitted and I've now got the Hive

that when I'm out I can tell it to switch the central heating on and so on. Which again, is all new to me and I find it fantastic. I've bought a couple of plugs so I can turn some of my lights on now. Unbelievable that you can just say, 'Alexa, lamps on,' and hey presto, the lamp's on"
(Existing online adopter; male, 66+, North West)

"I do think you need it, do you want to book a flight, do you want to get in touch with a counsellor, do you want to see what times the train's leaving, and all that sort of stuff is great"
(Recent online adopter; male, 36-65, Northern Ireland)

Notably, and related to the general belief that social media is a negative force, participants rarely pointed to increased social connections being a significant societal benefit of the internet. Social connectivity on the internet, particularly related to social media, was usually posited as a negative, specifically around themes of a lack of connection to the real world, abuse and trolling and the effect of the internet on children. In contrast, when prompted about Covid-19 specifically, the social benefits of the internet were often spontaneously mentioned, as examined later on in the report.

4.2 Exploration of the key concerns surrounding a digital society

Looking more closely at the negative effects of the internet on society, these fell into four distinct categories. The first three themes hinge around the idea that the internet isn't generally used for meaningful activities, and that social applications of the internet, in particular, have a negative impact on society. Finally, the last theme is based on the idea that the internet is unable to provide value beyond existing ways of doing things, and is therefore redundant, if not actively a negative influence.

Lack of connection to the real world

- Concerns were raised about the increasing amount of time that people spend online and the impact on their social lives. There was a perception that internet users are placing too much importance on virtual spaces such as social media, and placing too much emphasis on the opinion of others.

- This concern also relates to the fact that the internet is seen as addictive and all-consuming:

"Most people now are on it constantly… Everybody has a phone in their hand. They walk past you with a phone in their hand. There are cars coming and going, and there they walk along not caring if they bump into you, or fall over you, or anything else. It's like it's glued to their hand. They must answer it immediately"
(Digitally excluded; female, 66+, North West)

- Participant's also suggested that such a lifestyle made people much more irritable and impatient, as everyone is used to having everything on demand whenever they want it.

Keyboard warrior syndrome

- The lack of connection to the real world has resulted in the rise of trolling and general nastiness on the internet. The anonymous nature of the internet has resulted in behaviour becoming commonplace that is less likely to happen in person, because the human element of interaction has disappeared:

"I think it's made us more of a bitchy sort of society"
(Recent online adopter; male, 36-65, Northern Ireland)

Impact on children

- Young people are seen to be the most susceptible to the negative impact of being disconnected from the real world and participating or being subjected to nastiness online. The concerns stem from the fact that young people have grown up with these technologies, so they don't know any better, and are perhaps the most impressionable.

- There is a perception that digital connectivity shortens the attention span of children and make them less well-behaved. The only solution seems to be allowing children more screen time to appease them, creating a vicious circle.

- Digitally excluded parents are also concerned because they are aware that they don't necessarily understand the risks that their children might be exposed to if and when they start using the internet.

"I'm a bit nervous about that to an extent because I'm not very confident online, and I haven't really had loads of need for it in the past. I've always worried about when you hear things like scams and stuff like that, that you need to tread carefully. So, I think it's a different world now to when I was growing up. You've got things like online bullying and that type of stuff, where I don't quite know how you deal with that because of the whole new element of society that when I was a child you didn't have to worry about, it didn't exist"
(Digitally excluded; female, 36-65, Northern Ireland)

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What's wrong with the current way of doing things?

- Finally, participants often expressed that many aspects of their lives don't need to be digitalised, as the current way of doing things worked well. One participant expressed a preference for paper rather than doing things digitally because he didn't want to get internet access, so having bills in paper form was vital for knowing how much he was due to pay.

- Participants also often expressed a general preference for using cash rather than contactless.

"If you've got the cash in your hand, you can't overspend"
(Digitally excluded; female, 36-65, Northern Ireland)

- Participants also expressed concerns about being left behind and being unable to participate in society due to a lack of connectivity. Participants felt that there was an increased assumption that everyone would be able to access the internet to achieve certain tasks. For younger participants, there were also concerns for elderly relatives who were considered to be even more digitally excluded with a lower level of digital skill.

"For my energy bills, I think they charge me now because I have a paper bill. So, they charge me something like £1.50 or something for having a paper bill. So, you can see that they're trying to force people to have paperless billing"
(Digitally excluded; male, 36-65, North West)

- The fear of being left behind was also acute for parents, who were stuck in a dilemma whereby they believe that the internet will have negative effects on children's wellbeing, yet they are also concerned that they may be doing some harm by raising them without access to the internet. In particular, parents mentioned that more schoolwork was being done online (particularly as a result of Covid-19), meaning that they were unable to keep up over lockdown.

- Participants were also concerned that a pivot away from traditional ways of doing things would lead to job losses and have a negative economic impact. For example, the rise of online shopping tends to disadvantage local shops who can't compete with the likes of big businesses who can now reach any consumers with an internet connection.

4.3   Impact of Covid-19 on digital connectivity views

It is fair to say that the Covid-19 pandemic has accelerated many digitalisation trends, as the UK adapted to life under lockdown and strict social distancing measures. In some cases, this meant in-person services being forced to close, and customers / users having to either forfeit using them or learn to use them in a more digitised capacity.

Participants mentioned that one of the most pressing closures for them was Post Offices, where many of the digitally excluded paid their bills. Bank closures also caused issues as participants who typically paid in cheques found that they could no longer do so. This was seen as part of the general process of services being pushed online to the detriment of physical and in-person options.

"Well, one thing is the post office is shutting, and I used to pay my bills at the Post Office, but now I've had to set up direct debits. That has been a big change"

(Digitally excluded; female, 66+, South West)

For many participants, the process of being forced to change their behaviour is itself a cause of irritation, regardless of the actual change that is required. Trips to the bank or the Post Office are an established part of the life that participants lead, particularly in smaller towns and villages where these premises are very local, and those we spoke with may have been visiting the same ones for years.

However, those that have used services that have become digitalised during Covid-19 generally found that they were easier than expected to navigate suggesting that this is sometimes an issue of perception, and less of reality. For example, one participant described having a successful online GP consultation. Another suggests that the Covid-19 pandemic had forced her to try and use her debit card more, and, as a result, has become much more comfortable doing so:

"I suppose in the last six months you come to rely a lot more on using your debit card... I was quite nervous about it. But, I would say it's maybe forced my hand a bit to say 'right, okay, look', it updates itself fairly quickly and it tells you what you have"

(Existing online adopters; female, 36-65, Northern Ireland)

As well as being forced to use certain services, internet adopters have been using the internet on more of their own accord. In this way, Covid-19 has acted as an incubator for digital skills – participants have spent more time than previously engaging in digital activities, which has in turn made them more digitally confident, and meant that some of the initial fear of using the internet has subsided.

Adopters are much more positive about the role that the internet has played in the Covid-19 crisis, with many pointing to the social benefits of platforms such as Zoom and WhatsApp for staying in touch with family and friends (and work colleagues and customers to a lesser extent).

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A key element of the positivity towards socialising online was that it was seen as a genuine form of communication – participants were surprised at the extent to which they could evoke face-to-face social interactions. Again, an attitude which the digitally excluded were very unlikely to express when asked about the idea of socialising online.

"Me and my eldest brother have become so close and, I mean, I think we've spoken more when I was shielded than what I ever did in the 62 years I've been on this earth"

(Existing online adopter; female, 36-65, South East)

Entertainment benefits of the internet were also keenly felt by adopters – again, participants were surprised by this, having low expectations of services such as Netflix and / or Amazon Prime, or at least assuming that online entertainment is not something that they'd be interested in.

"I sort of looked at the internet more as a bad thing more so than a good thing. But now, I'm going, 'Jesus, that Netflix is good,' and that-, you know? Amazon Prime"

(Recent online adopter; male, 36-65, Northern Ireland)

Given that digitally excluded individuals don't have a chance to change their perceptions of connectivity based on usage, it is perhaps unsurprising that this group of participants were least likely to say that Covid-19 had changed their views about the internet. These individuals generally held firm in their beliefs that they didn't need the internet and couldn't think of any or many areas of life or tasks that would be enhanced by being digitally connected. For example, digitally excluded people often pointed out that the phone was just as useful for staying in contact with family and friends during lockdown and that excessive communication that wasn't in person was unnecessary.

"I wouldn't really know how to use any of that stuff so probably not... the phone book's just the same, I think"

(Digitally excluded; female, 20-35, Northern Ireland)

"I prefer to dial a number and talk and communicate with people like you. I prefer that. Not keep typing in words of a message and waiting for the message to come back to you. I prefer to have someone to talk to"

(Digitally excluded; female, 66+, South East)

Interestingly, social and entertainment benefits generally fall outside of the 'useful' and 'practical' tasks that participants identified as the parts of the internet that did the most good for society.

Based on this, there are several factors which have shifted perceptions about the social benefits of using the internet:

1) Firstly, the recent and existing online adopters were more open-minded about the positive benefits of the internet than their digitally excluded counterparts. Given that adopters were the most likely to see the potential benefits of the internet, despite often being sceptical, this may explain why several individuals were 'won round' to the social

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benefits of connection. In contrast, the digitally excluded remained stubborn about the fact that digital connection had a diminutive effect on real-life connection.

2) The Covid-19 pandemic is seen as a special case, whereby services such as Zoom have a legitimate place in the social fabric of people's lives. Whilst participants would have generally preferred in-person contact, the internet has been an incredibly useful to deal with the effects of social isolation over the past months.

3) As with other digital services, the act of using the internet for social purposes is likely to result in individuals forming more positive perceptions of the internet than they originally held through familiarity and understanding.

5. Barriers to digital connectivity

5.1 Summary of barriers & the extent Covid-19 has impacted

There was a clear separation between the online adopter audiences and their digitally excluded counterparts and their respective barriers to going online. Online adopters were most likely to reference concerns surrounding using the internet and their online experience, whilst digitally excluded participants cited a recurring lack of 'genuine need', issues with digital skills and confidence, and also the potential negative impact on society (repeating and substantiating themes previously referenced in the report).

As a result of these core themes for each audience, it can be suggested that Covid-19 hasn't perceptually impacted the core barriers / concerns about going online – but it is fair to argue that the crisis has helped 'nudge' recent adopters online, and that once audiences are online, their concerns surrounding using the internet are often alleviated with time and experience.

Often linked to their older age profile and a perception that they've already missed the opportunity digitally excluded participants' attitudes towards the internet and barriers to moving online are least likely to have shifted as a result of Covid-19.

5.2 Core concerns amongst the digitally excluded

Reflecting the themes previously discussed in this report, digitally excluded participants had several unique barriers to / concerns about going online, which included:

Perceived lack of a 'genuine need'

There remains a strong perception or belief amongst the digitally excluded that they don't need to go online, and they are consequently unable to recognise or articulate any benefits or value from doing so:

> *"I just don't want to go online... I'm just happy doing what I do"*
> (Digitally excluded; male, 36-65, North West)

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"I just don't think there's any benefit for me, personally. I can't see it changing my life if I went online. I'd still do the same things that I have been doing, you know, without the internet. I haven't missed it, or anything"
(Digitally excluded; female, 66+, North)

Part of this lack of need is also an attachment to a simple way of living without distractions – including digital technologies:

"I don't really think it would add much to my life"
(Digitally excluded; female, 36-65, Northern Ireland)

"I prefer life the simple way"
(Digitally excluded; female, 66+, North West)

A lack of a genuine need is also compounded by older individuals within this audience, who felt like they have already 'missed the boat' on learning about the internet:

"I just feel as though I've missed the boat, where I've, you know, left it too late to - it's that fast now, do you know what I mean. I'm a bit bamboozled"
(Digitally excluded; female, 36-65, Scotland)

However, concerns surrounding the increasing shift of services moving online (i.e. paying bills, banking services) could act as a 'nudge' to get the digitally excluded audience online – but this would likely be met with resistance:

"I wouldn't be very happy about it actually. I wouldn't like it at all"
(Digitally excluded; female, 66+, South West)

Lack of knowledge and / or digital skills

Digitally excluded participants were also likely to cite a lack of knowledge and / or digital skills as a barrier to going online – or even engaging with peers who are online about their experience:

"Whenever my friend speaks about the internet, I go, 'right, I'm going home now"
(Digitally excluded; female, 66+, North West)

"You can't teach an old dog new tricks... My children will have said something about the internet, and I'll go, 'Oh come on, talk English"
(Digitally excluded; female, 66+, South)

Perceptions surrounding the perceived lack of a genuine need was compounded with the issue of lack of knowledge: for many of the digitally excluded audience, adopting the internet is simply not worth the hassle, given they anticipate they would need to put in a significant amount of effort for minimal gain.

Negative impact on society

Also unique to the digitally excluded audience, there was a perception that the increasing shift of companies, products, services and entertainment / leisure activities online is having a negative impact on wider society – which is not just related to the internet, but a range of technological applications and solutions:

"When you go on a phone and you ring up the electric, the gas, BT, anything like that, they go, 'Press this one, press that one,' then they tell you all-, go through all everything, and then you go, 'There's four numbers, press one of them.' Oh, my God. Then we get to a person? And when you get there, they cut you off. So, you know, I like to communicate. That might sound strange to you, but to me it's not"
(Digitally excluded; female, 66+, South East)

"If the kids were allowed to, they'd just plug themselves in. They'd just sit there on the screen and not move"
(Digitally excluded; female, 20-35, Northern Ireland)

5.3   Core concerns amongst online adopters (recent & existing)

Digital security

Amongst both recent and existing online adopters, concerns about security were identified as a key 'top of mind' barrier to online activity; in particular, an individual's ability to keep their personal information and details secure online, and the need to be aware of and vigilant against internet scams and fraud:

"I do think sometimes it can be a dangerous place because you never know whether you're going on a decent website and I do worry about that, whether buying things off eBay and things like that, because I know there's a lot of scams about so I am wary... I would never click onto any emails, funny emails or anything like that... I think fraud is the biggest thing, the scams, the fraud..."
(Recent online adopter; female, 66+, North)

"I always have that little worry about the security. I had something happen last year where I had a scam email sent to me, but the email was sent to me from my email address and it stated inside it that it knew one of my passwords. It was an old password, but it was still a password that I had used in the past and it meant that I had to change my email address and all my passwords. So, that was a bit scary"
(Existing online adopter; female, 20-35, South West)

These concerns often surrounded internet shopping and / or online banking (which were generally perceived to be key conduits or opportunities for internet fraud and scams), with attitudes and opinions often being influenced by word of mouth (i.e. from friends and / or family) and the news:

"I suppose I worry like most people about being scammed or someone getting your bank account details or something like that. But, touch wood, I never had a problem"
(Existing online adopter; female, 36-65, South East)

"Just security, you know. You hear stories about people getting all your identity and your bankcards if you're shopping online or whatever"
(Recent online adopter; male, 20-35, South)

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However, as these audiences became more familiar with and comfortable using the internet, there was agreement that internet fraud and scams are not as prevalent as they originally thought (prior to shifting online), with some participants also being able to comment on how they look to keep themselves 'safe' when online. Simple signifiers, such as the secure padlock in the corner of an HTTPS site, gave users peace of mind about websites, even if the level of knowledge about the security protocol was minimal.

"I do feel more confident now, I must admit, I wasn't at the beginning because you hear of people being scammed, not that I've got a lot in the bank, but you just worry because it's something new"
(Existing online adopter; male, 20-35, South)

"For years I was really worried about the whole internet, you know, the crime on it… But I have been more and more using my bank card online. More and more"
(Recent online adopter; male, 36-65, Northern Ireland)

"I go to the ones [websites] that have a padlock in the corner. That means that they're safe, and if you don't have that padlock then you're not to be going to those sites"
(Existing online adopter; female, 36-65, Northern Ireland)

This kind of knowledge is usually gained from friends and family, who are often supporting digital adopters when they are in the initial stages of internet usage. For example, one participant mentioned that she often reaches out to her nieces and nephews to ask for advice on certain emails or links, to see if they think they are safe:

"They generally tell me whether you should click on it or not"
(Existing online adopter; female, 36-65, Northern Ireland)

Online activities were perceived to vary in terms of the security risk level that they involved. The safest activities were perceived to be looking up information such as the news online, or simply using search engines for information. This was because it didn't involve giving out any personal details, particularly bank details. In contrast, online banking was generally considered to be high risk, and a 'final step' in terms of the adoption journey. For some existing and recent adopters, online banking was a step too far, and something they felt sure they would not be interested in pursuing:
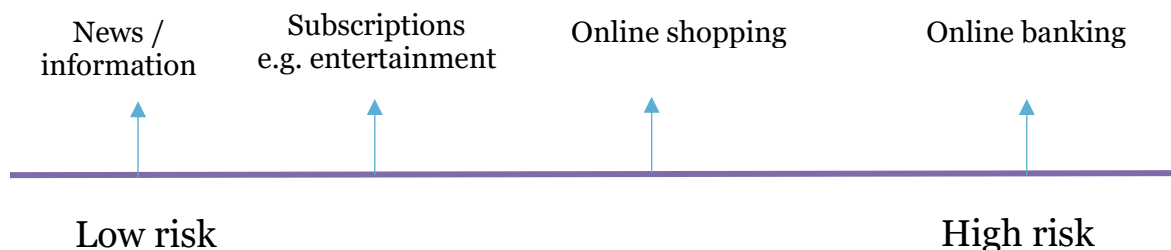
"I know they say, 'Oh, it's secure', but I sometimes wonder if somebody is so clever that they could do something to get in so, no, I won't do online banking… I am very sure I would never do that"
(Existing online adopter; female, 36-65, South East)

"I've just heard that if you're out and using the Internet, and you've got any secure things on there, like your bank and things like that, there used to be reports about people actually being able to access your details if they were near you and you were actually using online banking or something like that. So, I do have concerns about that, and I wouldn't do online banking"
(Recent online adopter; female, 36-65, London)

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Summary chart displaying online activities and level of risk associated:

News / information	Subscriptions e.g. entertainment	Online shopping	Online banking

Low risk   High risk

Interestingly, whilst shopping was mentioned as a concern to some extent, other activities where card details are entered online were seen as conceptually separate from banking. This suggests that reputational factors (of individual sectors and companies / brands) are more of a concern than the act of actually giving out card details themselves.

"Amazon's a big company so hopefully that should be okay, just in case anybody steals your money or your card details or something"
(Recent online adopter; male, 20-35, South)

Social media

Whilst not being a direct concern for either online adopter audience (as they are broadly not likely to be using social media), amongst those with children or grandchildren, there was also recognition of the dangers and negative effects of using social media – which could be linked to the recent increased media coverage of the impact of social media on individuals:

"I have some concerns about social media - particularly with the kids getting into this kind of thing"
(Existing online adopter; female, 20-35, South)

"I would love to be on Twitter, but at the same time, I don't think I want to sign up because I think that's where it takes up all your time and you can't do without it"
(Recent online adopter; female, 36-65, London)

As well as citing social media platforms and the availability of personal information on accounts as an 'enabler' for potential identity theft and wider fraud:

"Well, taking into account Facebook, and things like that, I would not want anybody knowing my business, and I think people can access your things - you hear all these people, that they get into your whatever… fraud and identify theft are a worry"
(Recent online adopter; female, 36-65, South)

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6. Journey to becoming digitally connected

6.1 Drivers / Reasons for going online

Across both the recent online adopters and the existing online adopters, the key differentiators between the two groups as to their reason to go online lies primarily with the Covid-19 pandemic. Existing adopters, unlike the recent adopters, did not have one pivotal event which essentially made the decision for them to move online. Their online adoption is more gradual and at a pace of their choosing, influenced by factors which are tailored to their particular needs, such as the requirement to engage with online banking or to enable their family members' internet needs.

"The main reason for getting the internet was so that the kids could play games on their tablets"
(Existing online adopter; female, 20-35, South)

"My mobility scooter's too big for public transport, so being able to do [banking] online appealed to me because it meant that I didn't have to struggle and it meant I could still keep an eye on my bank without having to go into town all the time"
(Existing online adopter; female, 20-35, South West)

For nearly all the recent adopters, going online was a way for them to stay in contact with their close family members, during the period of lockdown and restrictions on social interaction.

"I used to go to church, pay visits to my children, and go and visit friends and relatives. But since the lockdown was very severe, there was no way. And I could not spend all this time doing all this alone. I could not just stay like that, abandoned and cut off from all my relatives. I had to find a new way of communicating with them"
(Recent online adopter; female, 36-65, London)

The theme around communicating with family is not something exclusively linked to the recent adopters, with some existing adopters making the decision to go online because of family members who lived far away and the need to be able to communicate with them:

"I have a brother who is overseas. He's the baby of the family and he has youngsters now… [Online] you can stay in contact and there's different stuff that you could do. So, that was really the start of it"
(Existing online adopter; female, 36-65, Northern Ireland)

Thus a contrast can be seen in this factor as, for the existing adopters, geographic distance plays a big role in being unable to communicate with family members, while with recent adopters this distances in normal circumstances would not be an issue, but the lockdown and social restrictions on family meetings has forced them to resort to these similar measures.

Reasons for going digital for recent and existing adopters:

Existing	Both	Recent
£ 🎮	👥	📊
Banking Entertainment	Communication with family / friends	Business
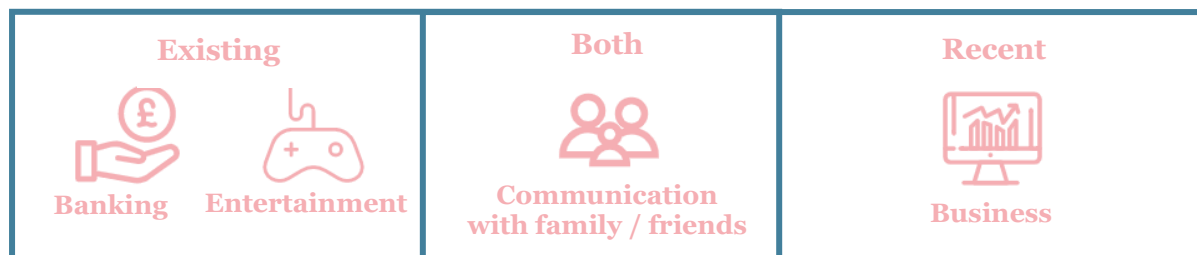
Finally, a small cohort of recent adopters who needed to move onto the internet did so primarily for business reasons, to enable them to continue working during the lockdown.

"It was mainly for my business, a lot of people were putting pressure on me, saying that I needed to be out there, because they wouldn't know whether or not I was available and if I was still working. With Covid, you couldn't have a crowd, you couldn't have people just walking in and out, so, you had to have an appointment system where you could know who's coming and what time they're coming"
(Recent online adopter; female, 36-65, London, Independent hairdresser)

6.2   Decision making process

As has been highlighted earlier, communication with family members plays a big role in the adoption of the internet and, as can be expected, family members play a very influential role in the actual decision-making process for online adopters. For many online adopters, family members play either one, or sometimes both, of two critical roles in the adoption process. The first being, the promoter of the benefits of the internet and overcoming obstacles to adoption, while the second is acting as the guide through the initial internet adoption journey.

Family members as drivers

For both adopter groups, family members are often the primary drivers of the decision to go online, this is via pushing the adopter towards adopting and also extoling the benefits and virtues of digital connectivity. Many adopters do not have an especially strong sense of antagonism towards the internet, thus having respected, close advocates pushing them towards internet adoption is something that they are not likely to resist:

"My cousin, he's quite into all that kind of stuff and he's been at me for ages saying 'Oh, you need to get this, you need to get on Facebook"
(Recent online adopter; male, 20-35, South)

"My daughter said, 'Mum, you'll need it for different things.' She said, 'What if you want to order something, if you need something? You're not going to be able to get it', she said 'And I might not be here to do it for you.' So, that's what I thought I'd better go online"
(Recent online adopter; female, 66+, North West)

Roadblock removal

As has been seen often, some of those who are digitally excluded, would like to go online, but find the entire process overwhelming and confusing, thus preventing them from enacting upon their desire to move online. With close family members able to guide them along this journey, these impediments are removed and the 'hard work' is taken off of the adopter's plate.

"My brother worked out the technical nature of the deals. He said which one he thought would be better for what he thought I was going to be doing"
(Existing online adopter; female, 36-65, Norther Ireland)

"It was mainly my son because I didn't even know what a gigabyte was. I really didn't. I didn't know what to look for, what was a better deal or anything like that, I didn't have a clue, my son told me, 'You're better off with that one mum"
(Existing online adopter; female, 36-65, South East)

However, not all digital adopters are reliant upon family members for installation. Some of the recent adopters were more than capable of the tasks required to move online. Their reasoning for not previously going online was not due to a lack of technical competence, but rather a lifestyle choice, one which due to Covid-19, was taken away and thus they were then required to engage in setting themselves up. This is also coupled with the ability of many adopters to link their online adoption with their current usage of satellite / cable television services; many of which offer package deals that allow the adopter to simply add their internet capabilities and costs into their current deals.

"Just looked at some different options, but I already had Sky TV, so decided to go with them because I knew them"
(Recent online adopter; male, 36-65, Northern Ireland)

For those who had decided to go with a Sky or Virgin internet addendum to their existing TV services, the installation process was broadly described as relatively easy, for existing adopters, an engineer was sent round to install the internet for them, but for those who signed up after Covid-19, this service was not readily available and as such they relied upon family members to install the internet for them.

"I had somebody come to visit because I had already put the cable underneath, the Virgin cable. They'd installed that years and years ago. I don't know why but they just installed it and it was just literally then them coming to the house and connecting it indoors"
(Existing online adopter; female, 36-65, South East)

"I had a fellow come, but I don't even think he came into the house. He just came and he was away in about five minutes. My cousin was there too, I think the router came in the post, so he just plugged everything in and that was it"
(Existing online adopter; male, 20-35, South)

"My niece installed it for me"
(Recent online adopter; female, 36-65, London)

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6.3   Influence of features & services in the decision

For existing adopters, streaming services such as Netflix, Amazon Prime and catch-up TV are often prevalent in their lives. Continuing the theme of family support, most of the existing adopters who had Netflix did so because they owned smart TVs and they gained access to the streaming service via accounts primarily owned by family members.

> *"I think these services are quite good. I watch catch-up TV and I have got Netflix. My grandson put it on my TV. He came round here once and wanted to watch something on Netflix and I didn't have it, so I'm connected there"*
> (Existing online adopter; female, 36-65, South East)

> *"I have now also got a smart TV so I am able to watch Netflix and I've got an Amazon account because I can watch Prime Videos and that on it"*
> (Existing online adopter; female, 36-65, South East)

Recent online adopters in most cases did not have access to Netflix, this is primarily due to their technological aversion. Only a couple of them owned smart TVs and many found the cost of extra television services such as Netflix too extravagant for their budgets. Their need to go online is driven by the practical life concerns such as communicating with family, rather than for entertainment purposes.

As noted previously, while Netflix has played a role in providing entertainment for online adopters during the pandemic, fewer adopters spoke about their usage of catch-up services such as BBC iPlayer and ITV Hub. Other figures show increased usage of BBC iPlayer and other on demand services - in particular during the pandemic.[5] The prevalence of Netflix mentions amongst participants might reflect individuals coming to the brand for the first time – it could be considered new and different to content duplicated by linear channels (i.e. BBC, ITV) that they also already consume.

> *"iPlayer? I'm not really sure what that is, but Netflix is where you can watch films, and things like that. No, there's enough on telly for me at the moment"*
> (Recent online adopter; female, 20-35, South)

For the few existing and recent adopters that do use catch-up services, demand for the services are varied, some who were previously removed from traditional television as the core of their entertainment have embraced catch-up services in a way which is new and exciting to them:

> *"I love the internet now because I can get ITV Hub and I can get BBC iPlayer and all of this. Even though I don't watch telly that much, sometimes I'll go on the Hub and have a look at what I've missed"*
> (Recent online adopter; female, 66+, North-West)

It may be interesting to potentially document a follow up to some of the participants, especially once social interaction and family engagement restrictions in the UK are lifted. As previously stated, other family members tended to own the account and they were also responsible for installation of Netflix on the existing adopters' televisions. Potentially, recent adopters and digitally excluded who are imminently about to make this leap are not able to access this familial resource and so they have not been able to, we see evidence of this in experience from an existing adopter who has not yet been able to get a streaming service on their smart TV.

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[5] https://www.bbc.co.uk/mediacentre/latestnews/2020/bbc-iplayer-lockdown-viewers
https://www.bbc.co.uk/mediacentre/latestnews/2020/iplayer-new-record
https://www.bbc.co.uk/mediacentre/latestnews/2020/iplayer-half-year

"I have got Amazon Prime on my Kindle, but although I've got a Smart TV, I can't seem to get it on my TV and watch it"
(Existing online adopter; female, 36-65, South East)

Participants across both the existing and recent adopters' groups generally do not seem keen on the premise of using the internet for educational purposes. However, there are some existing adopters who use Google as a source for answering questions and queries that they may have. This points to an acceptance that the internet can used on a peripheral level to attain knowledge, but the link between wider academic and educational services and the participants may not have been made yet. Age may be a relevant factor in this, but it can be estimated that this is probably due to lack of need at present.

"I Google everything. It might not be the right answer but it puts you in the right direction. My friends' little boy was a bit poorly not so long ago, so I Googled what he had. I wouldn't have done that years ago"
(Existing online adopter; female, 36-65, North West)

Regarding usage during the pandemic, some participants who use streaming services have seen their usage rise during the Covid-19 pandemic. With the amount of time spend indoors, these existing adopters have turned to streaming services to aid them in passing the time for them and their families.

"I normally just watch Netflix. I used to watch it then I stopped, then I started again, I'm watching more content on Netflix as a result of Covid"
(Existing online adopter; male, 20-35, South)

"I am spending extra on Netflix and Disney+, but it's keeping my kids entertained. So, it keeps their mind off like actually going out and things like that"
(Existing online adopter; female, 36-65, North West)

6.4   Expectations for digital connectivity / being online

Opinions are varied among digital adopters as to how they thought their internet experience would be. Many did not have any particularly strong or defined expectations about what they would be doing on the internet, other than using it for practical purposes. This could be tied into the lack of knowledge about what goes on with the internet and thus being unable to conceive what they would be doing with it.

"I didn't really have any, I thought that sometimes I'd go and browse clothes. I knew some friends, that they did things like that"
(Existing online adopter; female, 36-65, South East)

"I was purely only getting it for that purpose, just so that I could speak to my grandchild, that was purely all it was for"
(Recent online adopter; female, 36-65, South)

Others had grand hopes for their internet activity. The internet had been sold to them as beneficial and thus they expected results to positively impact them:

"The world was my oyster, at that point"
(Existing online adopter; female, 20-35, South West)

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Not all recent online adopters were positive about the initial experience of going online. Moving online was a big step for them and many of them held, and potentially still hold, some of the negative thoughts or perceptions that had prevented them from moving online in the first place, such as the removal of social capabilities in the real world or getting scammed online, so there is a trepidation about being new to the internet, but which is often overcome over time.

"There was a wee bit of fear I had from the start, but I think it's all extremely easy to use"
(Recent online adopter; male, 36-65, Northern Ireland)

6.5   Experience once digitally connected / online

Having had time to adjust to life online, adopters have different perceptions about what the benefits are of digital connectivity, but, by and large, they are very positive about what the internet has done for them. For some, particularly, the recent adopters who specifically moved online to be able to communicate with loved ones, the ability to speak to family during the Covid-19 pandemic a has been a key benefit, while for others they had had the chance to improve themselves through learning, or given themselves and their families access to previously inaccessible areas of entertainment.

"More things to do during lockdown has been a real positive. Also the ability to give the kids something to entertain themselves which gives me a little bit of breathing space around the house"
(Existing online adopter; female, 36-65, South)

"Now there are many things that I can do by myself. I feel more independent and I feel more connected to the world. It's really serious for me"
(Recent online adopter; female, 36-65, London)

Very few online adopters have experienced any drawbacks in their time online, with most commenting that they had not experienced any significant negatives while being online. Although many expressed fears about being scammed or defrauded, very few, had experienced this personally.

Of those who did have drawbacks, one of these experiences happened during the height of the initial wave of Covid-19 with a recent online adopter attempting to utilise new services (i.e. online shopping), with the lack of successful completion potentially being linked to their relative digital inexperience. Another recent adopter relayed how they had received negative feedback regarding their business. However, it is important to note, that these are more likely to be specific issues to individuals, as opposed to more general themes amongst the online adopter audience.

"At some point during the lockdown once, I tried to see if I could shop online, and have the groceries delivered. Someone was talking about it, but that wasn't easy. I ended up just going to a store as I usually do"
(Recent online adopter; male, 36-65, London)

"I have people review me and, some people could be really horrible. I'm not one to take criticism really well"
(Recent online adopter; female, 36-65, London, Independent hairdresser)

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7 Tackling digital exclusion

7.1 Impact of Covid-19 on digital exclusion & internet usage

The impact of Covid-19 upon UK society is something which most will agree has been great and all encompassing. Covid-19 has changed the world in which live on an unprecedented scale, but how people react to this change has varied, and this can be seen in how perceptions of the internet have changed and, in many cases, have not changed and potentially hardened due to the nation's reaction to the pandemic.

Firstly, among existing adopters, the Covid-19 lockdown saw their overall internet usage grow. For some this hasn't affected their perceptions and they say that the internet's importance has remained about the same as previously. But many have started using the internet for entertainment purposes, while others have used it as a way to keep in contact with family members or gain access to essential services. Covid-19 has given the internet and its variety of services a platform to showcase its positive aspects and wider uses. This has made the internet much more important for them.

"It's a good job I got connected. When the lockdown was happening, I was so grateful for the internet"
(Existing online adopter; female, 66+, South West)

"I think it's become more important, with shopping and things like that"
(Existing online adopter; female, 20-35, South West)

There are also recent adopters who due to Covid-19 have been forced to move online and existing users who have seen their usage increase, potentially against their will. These people have moved online not because they particularly wanted to, but because it was necessary for family and / or business reasons. These people appear to miss the lives they had before, one in which the internet played either a minor or no role whatsoever and though they may not return to a fully digitally excluded life, if or when life returns to normal, there are signs that they will decrease their internet usage from the levels that they currently engage in or at the very least keep usage levels at the state they are now:

"I used the internet a hell of a lot more during lockdown. I'm not going to let this be the way of it for the rest of my life"
(Existing online adopter; male, 36-65, Northern Ireland)

"It's not important, yes, you can actually speak to people online. But I suppose you can ring them up at the same time on a normal phone"
(Existing online adopter; male, 20-35, South)

This potential overexposure to the internet has not been missed by sections of the digitally excluded. For many of these people, living a life 'offline' and removed from the internet is seen as a badge of honour, a virtue which prioritises face-to-face communication and interaction, and minimising as much digital usage as possible. They may not use the internet themselves, but they see those around them using their smartphones in social spaces and using them more than ever and they feel isolated taking an opposing stance to this in their own lives:

"Everyone I know can do nothing unless they're in front of a screen. I do not believe children should have these iPhones... I've got four great-grandchildren and three of them have their own little phones that they talk to on it and I think it's so wrong"

(Digitally excluded; female, 66+, South)

For those who continue to live a life digitally excluded, these feelings of rejection not been negated due to Covid-19, if anything they have become more emboldened and the internet continues to be something they are happy to live without.

"I just don't give it any consideration. I have seen the advertising and, I don't know, it's just not affected me. I'm of the same opinion as I always was. Just not interested"
(Digitally excluded; male, 36-65, North West)

"Because I don't use it, I don't miss it. If I don't miss it I just plod on exactly how I'm doing. I don't think it'd alter me in any way"
(Digitally excluded; female, 66+, South)

These particular viewpoints appear to be strongest in those who are in the older demographic groupings. For these participants, there is a sense that their time to learn about the internet has come and gone and not even a pandemic will shift this thinking. Additionally, their family members may not be putting as much pressure on them to adapt to the internet as they might if the participants were younger. There is almost an unspoken acceptance that because they are old, that the internet isn't for them.

We also see among the digitally excluded that some of these participants are not fully averse to being online. They understand that the internet could have benefits for them, especially during the Covid-19 pandemic, but ultimately they have been unable to overcome the roadblocks such as being able to decipher the steps need to go online or build the digital literacy skills that would allow them to go online and, as such, they remain digitally excluded.

"I wanted to keep up with the news on Covid, but it hasn't at all influenced my likelihood of going online"
(Digitally excluded; female, 66+, South East)

"The main thing is that I would have liked to do some online shopping so that I could limit my exposure to the virus"
(Digitally excluded; female, 20-35, Northern Ireland)

On the other side of the spectrum exist the online adopters who have had their 'eyes opened' and have fully embraced the benefits of being on the internet. The Covid-19 pandemic and subsequent national responses, has allowed them to not only continue essential aspects of their lives, but also shown them new, fulfilling things that can be done too. Many people around the UK will have unexpectedly gained a large amount of extra time on their hands to engage in areas where they had no time to engage in before and being able to learn to use the internet will have been a boon for them.

7.2   Benefits which could 'cut through'

As a result of the Covid-19 pandemic, many people across the UK were forced to engage with the internet for the first times in their lives. This created a unique opportunity for some internet benefits to shine through in a way which wasn't possible before. The main benefit being the ability to communicate with family members. For many digitally excluded individuals this was not an issue before Covid-19, as they were free to see family members and for older members, they had family members who would often visit them every so often. But with Covid-19, this became impossible in some circumstances.

With the recent developments regarding future waves of Covid-19 and more lockdowns, be they local or national, this communication aspect needs to be focused on and encouraged more widely. When asked if family members being online would encourage them to go online, some digitally excluded participants responded affirmatively.

"Yes. We have a daughter that's in New Zealand"
(Digitally excluded; female, 66+, North)

"Using Zoom would have been useful for connecting with family and friends over the past few months"
(Digitally excluded; female, 20-35, Northern Ireland)

What may not 'cut through' is the necessity and adaption to their lives that the internet brings. As stated earlier, many, particularly older participants are already set in their ways. They have lives which do not demand the modern essentials that younger participants need and additionally, their "stubbornness" is rewarded in a way which would not be acceptable for younger participants. If these participants do need something absolutely critical that requires the internet, there is a tacit acceptance that they can call on a knowledgeable family member to engage for them and act on their behalf, thus gaining the benefits of the internet, without having to do it themselves.

"If I did not live so close to my family and I had to do it for myself, I would do it. I've got the convenience of saying, you know, I don't need a lot online, but if I do need something, I've got somebody that'll do it for me"
(Digitally excluded; female, 66+, South East)

"I think it's more sheer laziness, to be honest with you, and not taking the time to learn and finding it easier to ask somebody to do it for me than do it myself. If I didn't have so many people worrying about me, doing it for me, I probably would have had to, but I just don't need to"
(Digitally excluded; female, 36-65, Scotland)

This capability to peripherally engage with the internet when they need will ultimately prevent these types of digitally excluded people from moving online. As long as someone is around to help them, they will <u>not</u> go online. Working in tandem with this are the roadblocks that would need to be overcome to move online such as setting up the internet and deciding on packages and costs. These are significant roadblocks for many, and if there is no one trusted to even help with access to the internet, it cannot be expected that there will be someone trusted to guide them through the process of getting online.

This gap in help could be filled hypothetically by broadband agents who are there to answer questions and help those who want to go online, but yet these agents would not be able to be relied upon to do the actual work online, i.e. order your shopping for you or open your emails for you.

The recent online adopters may serve as the best way to examine which specific measures could be the biggest attractors for the digitally excluded. As has been mentioned by many of those who have gone online due to Covid-19, it was communication with family and friends which served as the factor or 'nudge' that pushed them into adoption. But of the communication forms spoken about, video communication services such as Zoom and Facetime are the areas which may hold the greatest potential.

"Using Zoom would have been useful for connecting with family and friends over the past few months"
(Digitally excluded; female, 20-35, Northern Ireland)

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It doesn't replace actually meeting people, but if you've got somebody who's on the other side of the world, it opens up a new way of staying in contact"
(Existing online adopter; female, 36-65, Northern Ireland)

"Hopefully this won't go on forever, but I'm happy now that I can talk to the children. If they're doing something at that time, they Zoom me, and I can see what they're doing"
(Recent online adopter; female, 36-65, South)

Strength of communications 'cut through' for adoption:
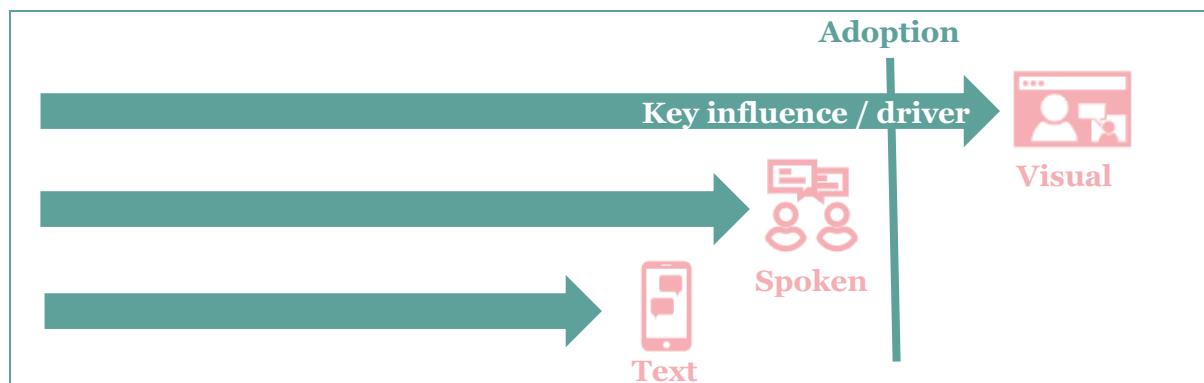
On a wider scale, the biggest impact on social interaction for the public has been in terms of face-to-face communications. Covid-19 has not affected individual's ability to call each other on phones or message each other through WhatsApp or SMS, but for many of the participants in our research, the enforced lockdown, meant that grandparents were unable to physically see their grandchildren and that adult children were unable to visit their parents (whether they live locally or abroad). Services such as Zoom and Facetime can serve as great proxies for this missing social interaction point. As previously referenced, one participant recalled that a well organised Zoom meeting can serve functions that many would long to be able to take part in and if the pathway were laid out for them, they might cross the threshold into online adoption:

"The biggest thing I would say is Zoom and it's worth me joining the internet and TalkTalk. We've been having gatherings on Saturdays with the family, there's been as many as 25 of us. We've had quizzes and fancy dress parties, we've had all sorts, so you're having a few drinks and having a good laugh and I swear that's what it's all about"
(Existing online adopter)

7.3 Making the leap to digital connectivity

As part of the final element of this research, existing and recent adopters were asked to give advice to digitally excluded individuals who could be considering going online but have not done so yet. For a particular subset of participants, who tended to be younger (i.e. aged below 40) and recent adopters, the advice tended to be straightforward and direct in expression; essentially 'Just do it'.

"I think just that if they can afford it just go for it"
(Recent online adopter; male, 20-35, South)

"I think just do it, go for it, you know, I pay, I think, about £20 a month for mine, at home and it's so worth it. It just takes away all the hassle of things like shopping and banking and things like that, you know, it's really made a difference. Especially with the disability, it's made such a difference"
(Existing online adopter; female, 20-35, South West)

This advice appears to come from their perspective where they do not think the digitally excluded are incapable of going online, but rather treated it as a mental and / or emotional barrier. Something which when initially overcome will be seen as not worth the initial fuss and bother.

However, others offered more nuanced advice, noting a need for personalisation and steadiness when deciding to go online:

"I think you've got to look into it, look at what you actually want. I think you've got to do it for yourself, not for what other people want"
(Existing online adopter; female, 36-65, Northern Ireland)

"I'd say to them, if you do go online, just be ready for the critics, because not everybody can handle criticism. So, just be ready for people to have an opinion"
(Recent online adopter; female, 36-65, London)

"If you need to go, you will find the way of going. I mean, everyone goes at their speed. If someone is thinking about going online, I will say it makes things easier"
(Recent online adopter; male, 66+, North)

This approach will likely be better suited to those from older age groups. For these groups, they speak often about how they have lived their entire lives not only without the internet, but without a wide range of technological products and tools that younger people think of as normal, such as mobile phones. Taking a slow and steady approach may need to be the best approach for some as the wealth of knowledge that is required to move online, may be overwhelming.

"I'd say give it a go, depending on their age. My dad has actually got the internet now but he never uses it because I think he's probably slightly too old to pick it up, if that makes sense. By the time we've shown him what to do he's forgotten it five minutes later"
(Existing online adopter; female, 36-65, South East)

Though the above quote may make it seem as if getting older people on the internet may be a futile exercise, with support, patience, and perseverance from close friends around them digital adoption for even the oldest members of the population can become possible. The father in the above situation may not fully remember all the things been shown to them, but it appears that individuals are willing to be shown how to use the internet by friends and or family, and that there is still an interest in adopting online practices.

However, the task in hand may need to be repositioned away from how can the digitally excluded be brought up to the standards of the modern tech savvy internet user towards, to which areas of online usage can be made simpler and easy enough that even in old age, potential users will be able to pick up these processes and move online.

8. Further information

Savanta ComRes provides specialist research and insight into reputation management, public policy and communications. It is a founding member of the British Polling Council, and a company member of the UK Market Research Society, as such, it is committed to the highest standards of research practice.

In July 2019, Savanta ComRes (previously known as ComRes) joined Savanta, a specialist market research company which has vast experience of research and consulting with clients in a range of industries and sectors on policy and communication research.

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