

DIGITAL NATION UK 2020

FACTS, STATS AND FIXING THE DIGITAL DIVIDE

UK DIGITALLY EXCLUDED

7m
NO internet access at home⁵

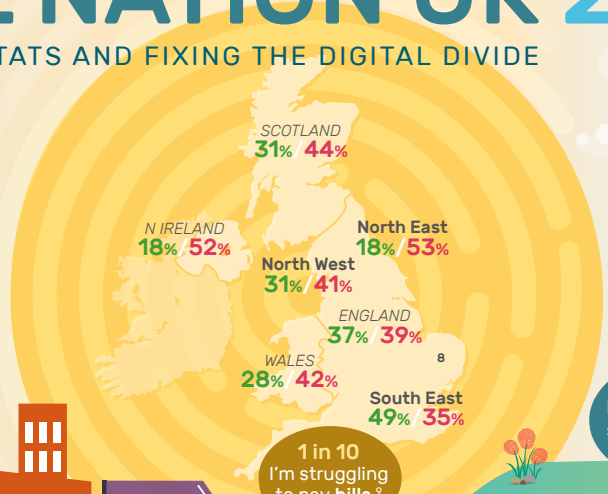
9m
CAN'T USE INTERNET WITHOUT HELP¹



38% non or lapsed users worried about privacy + security⁷

1.2m increase in basic device + internet ability since 2019³

<£20k earners with least digital engagement pay **42% more on utilities** than the most digitally engaged.⁴



42% of population worried about fraud + scams⁶

5
ESSENTIAL DIGITAL SKILLS FRAMEWORK

UK DIGITALLY INCLUDED

27.6m
HIGHLY ENGAGED²

£348
I saved on utility bills alone.²⁸

80% Digital is a vital support for me in lockdown.¹⁴

11k+ devices with data + support delivered by Good Things during the pandemic.³⁵

77% Online learning benefits my mental health.²⁶

44% I manage my health + wellbeing online.³⁰

10% of UK economic output is linked to online learning for work²⁷

DIGITAL STRATEGY FOR ALL

49k+ more Good Things online learning episodes.³⁶

900+ Good Things community partners continue support including remotely.³⁷

4 in 5 adults use a smartphone.³⁴

55% I feel more part of a community.³²

87% I connect better with my friends and family.³¹

57% I earn £2,160 more per year.²⁹

76% I have improved my job / prospects.³⁸

MOTIVATION

I'm a financially vulnerable full time carer.

11m use the internet for social media and entertainment.²³

I don't know where to get help.¹³

1 in 10 I'm struggling to pay bills.⁹

I can't afford home broadband or mobile data.¹¹

2.7m claimant count. **730k** less employed in July than March. Many need new digital skills to find work.¹⁰

DATA POVERTY LAB

61% The internet should be a utility.¹⁸

56% I'm furloughed and want to learn new digital skills.¹⁷

29% I was helped to use the internet for the first time.³⁹

57% I improved my digital skills in lockdown.¹⁶

27% I used mobile payments for the first time.¹⁵

75% Every community needs a place to get Internet skills help.¹⁹

73% of small business owners agree that IT skills are essential for their business to thrive.³³

CONFIDENCE

I live in a city and have never worked or had a long term job.

I'm young, in semi/unskilled work, unlikely to go to university.

I have a longterm health condition / disability.

I'm retired and financially vulnerable.

10m do not or rarely use the internet.²⁰

I live alone in rented / sheltered accommodation.

17m use the internet for limited purposes.²²

I live alone with little contact and am vulnerable to COVID-19.¹²

SMARTPHONE ONLY
9x more likely in DE than AB households. It can affect critical engagement.²⁴

I'm a late-career parent with children at home, struggling to get or keep work.

SKILLS

I have no/few qualifications, am isolated rurally and lack confidence in digital skills.

13.6m workers have digital life skills but lack digital work skills.²⁵

DIGITAL CATCH UP

COVID-19 exacerbates the digital divide



Good Things Foundation

Improving lives through digital

Digital Nation UK 2020 Explainer

On the horizon 9m struggle to use the internet independently.¹ 27.6m are highly digitally engaged.² 1.2m more people gained basic internet abilities since last year.³ The benefits of digital inclusion can be greater for those earning less.⁴ But 7m (11%) are still offline.⁵ Online safety is an issue for all,⁶ and can be a big barrier for some.⁷ **The map** shows some differences between extensive internet users (in green) and limited or non-users (in red), using Ofcom data.⁸

Digital Nation UK 2020 carries a warning: 'COVID-19 exacerbates the digital divide.' 3 bridges set out ways to **cross this divide**: a Digital Catch-up scheme; a Data Poverty Lab; and a Digital Strategy for all. In the **left COVID-19 zone: challenges compounded by COVID-19** include reduced incomes,⁹ redundancies,¹⁰ not being able to afford internet access,¹¹ isolation,¹² and not knowing where to turn.¹³ In the **right COVID-19 zone: how digital has helped people in the pandemic**: as a vital support,¹⁴ using mobile payments,¹⁵ improving skills,¹⁶ and wanting to improve skills.¹⁷ A new public poll indicates support for internet access to be recognised as a utility¹⁸ and for every community to have a place to get help with Internet skills.¹⁹

Digitally Excluded UK (on the left, in red), are those who **never or rarely use the internet**.²⁰ Some use the internet but lack adequate home access to broadband or suitable devices.²¹ A worrying number of 'limited internet users' (in orange) are online but using the internet for very few things.²² For example, young people with no or few qualifications who only use the internet for social media or entertainment.²³

Many limited users only have a smartphone; this can affect critical engagement.²⁴ Many still lack the digital skills needed for work.²⁵ **Four signposts** point to access, motivation, confidence and skills as factors needed to cross the digital divide.

Digitally Included UK (on the right, in green) shows the **benefits for those digitally engaged**, including the mental health²⁶ and economic benefits²⁷ of online learning generally. Saving money,²⁸ increased earnings,²⁹ managing health and wellbeing,³⁰ connecting with family,³¹ and community life³² as well as helping businesses.³³ Many own a smartphone.³⁴

Finally, examples of **how we and our network have helped people before and during the pandemic**: supplying data, devices and support,³⁵ free online learning,³⁶ offering local and remote support,³⁷ developing skills,³⁸ and helping people go online for the first time.³⁹

References

1. Lloyds Bank UK Consumer Digital Index 2020.
2. Lloyds Bank UK CDI 2020.
3. Lloyds Bank UK CDI 2020.
4. Lloyds Bank UK CDI 2020.
5. Ofcom Adults' Media Use and Attitudes Report 2020 / Ofcom Technology Tracker.
6. Ofcom & ICO (2020), Internet Users' Experience of Potential Online Harms.
7. Lloyds Bank UK CDI 2020.
8. Ofcom 2020 Adults' Media Use & Attitudes / Yates. Analysis of Ofcom data by Prof. Simeon Yates for Good Things Foundation. Latent class analysis to understand characteristics of 'non-users', 'limited users' and 'extensive users'.
9. ONS Coronavirus and the Social Impacts on Great Britain Survey (3.7.20) 11% of adults (5% pre-COVID-19).
10. ONS Labour Market Overview UK: Aug 2020.
11. APLE Collective (2020), Coronavirus response must include digital access to connect us all. JRF.
12. BT Skills for Tomorrow (2020), Fears for over 70s struggling with digital isolation during lockdown - post 15.5.20.
13. Good Things Foundation (2020), COVID-19 Response Report. Updated with September 2020 data.
14. Lloyds Bank UK CDI 2020. (Attitudes towards digital engagement during COVID-19).
15. Nationwide (2020) Average Brit goes 44 days without using cash - post 23.3.20.
16. Lloyds Bank UK CDI 2020. (Attitudes towards digital engagement during COVID-19).
17. Make it Click (June 2020) Research on furloughed workers, drawn from a UK sample of 2,003. Censuswide 1.6.20-3.6.20.
18. Research by Ipsos MORI for Good Things Foundation. Nationally representative quota sample of 2,219 adults aged 16-75. Online I: Omnibus. 28.08.20- 31.08.20.
19. Research by Ipsos MORI for Good Things Foundation.
20. Ofcom 2020 / Yates analysis.
21. Ofcom 2020 (Children and Parents: Media use and attitudes 2019) / Yates. Analysis of Ofcom data by Prof. Simeon Yates for Good Things Foundation.
22. Ofcom 2020 / Yates analysis.
23. Ofcom 2020 / Yates analysis.
24. Ofcom 2020 Adults' Media Use & Attitudes. Smartphone-only users are less likely to recognise sponsored links preceding search results.
25. Lloyds Bank UK CDI 2020. Note, the Essential Digital Skills Framework covers skills for life and for work.
26. Demos (2020), The Learning Curve.
27. Demos (2020), The Learning Curve.
28. Lloyds Bank UK CDI 2020.
29. Lloyds Bank UK CDI 2020.
30. Lloyds Bank UK CDI 2020.
31. Lloyds Bank UK CDI 2020.
32. Lloyds Bank UK CDI 2020.
33. Make it Click (August 2020) Research on 503 UK small business owners and sole traders. Censuswide 1.6.20-3.6.20.
34. Ofcom 2020 Adults' Media Use & Attitudes.
35. Good Things Foundation (2020).
36. Good Things Foundation (2020).
37. Good Things Foundation (2020).
38. Good Things Foundation (2020).
39. Good Things Foundation (2020).