

# DIGITAL EXCLUSION

## IN GWENT

Digital technologies have transformed the way we live, work, and communicate. With the rapid development of technology, digital exclusion has become a critical issue that affects various aspects of our lives. In recent years, the COVID-19 pandemic has accelerated the need for digital access, making it an urgent priority for governments, businesses, and individuals.

The Gwent region of Wales is no exception to this trend, where a significant proportion of the population faces the risk of digital exclusion.





The Digital Exclusion Project is a 9-week research project conducted in the Gwent region, aimed at identifying the digitally excluded population and understanding the reasons behind their exclusion. The project also measures the success of existing initiatives and identifies areas where further action may be needed.

The research identified several initiatives that are in place to mitigate digital exclusion in the region, such as digital skills training, improved digital infrastructure, and affordable access to technology. However, the study also revealed that these initiatives are delivered in isolation, with no overarching governance to track or evaluate their success. Moreover, there needs to be more awareness and promotion of these initiatives, but due to limited resources inability to dedicate sufficient momentum.

The survey shows that digital skills training is a significant success and is welcomed by the residents. The number one motivation for people to get online is to help get a job. The overall Digital Exclusion Risk Indicator (DERI) score shows that the digital exclusion gap, including broadband access, is shrinking in the Gwent region. However, the deprivation score is slightly higher for Newbridge and Abersychan. The contact survey found that 13.8% of the population had no access to the internet or devices. The cost-of-living crisis is forcing people to prioritise food over home broadband. There is also a lack of formal monitoring and tracking of the initiatives by local LAs.

The report concludes with detailed findings, a comprehensive action plan, and a proposed governance structure to take the necessary actions forward. The proposed actions include creating a 'Regional Get Gwent Online' to reduce silo working, collecting data to understand the success of initiatives, collaborating with banks to create a safe spaces for online banking sessions and many more.

# Executive summary

In conclusion, the Digital Exclusion Project has highlighted the need for a collaborative approach to mitigate digital exclusion in the Gwent region. The proposed action plan provides a roadmap for the region's stakeholders to work together towards reducing the digital exclusion gap and ensuring that everyone has access to digital skills, technology and infrastructure.

# PROBLEM STATEMENT

## OVERVIEW OF THE PROBLEM



The problem identified is the lack of an evidence-based and comprehensive understanding of digital exclusion and its causes, including economic and infrastructure capacity and educational and device capabilities. This has resulted in a limited ability to identify those at risk of becoming digitally excluded and to design effective interventions.

Currently, relying solely on customer data and national statistics provides only a broad view of digital exclusion, limiting the ability to provide targeted and impactful support.





①

In Wales, 7% of the population aged 16 and over are not online – at around 180,000 people, that's a higher percentage than the rest of the UK.

②

Digitally excluded people are those who cannot get online because of lack of technical skills or access to the necessary technology or infrastructure. That isolation and those barriers contribute to poorer health for digitally excluded people.



## Gwent residents are disproportionately impacted by digital exclusion



ONS asked people in Gwent whether they had used the internet in the last three months.

Of those in **Monmouthshire and Newport**, 13 per cent said they had not recently been online, or had never used the internet – amounting to an estimated **24,000 residents**.

This level was higher in **Blaenau Gwent, Caerphilly and Torfaen**, where it was 15 per cent – around **38,000 residents**.

## BACKGROUND

Within Gwent, service providers are delivering numerous projects and initiatives. Digital Communities of Wales has committed to supporting approximately 102,000 individuals in achieving digital confidence by the year 2025, to recruit more than 3000 volunteers to provide support to citizens and to aid organisations in recognising and embedding digital inclusion in their strategic planning and delivery. Infrastructure projects, including Superfast Cymru, Access Broadband Cymru (ABC), Next Generation Access Broadband Wales, and the Local Broadband Fund, are also being delivered to support people getting digital.



## PROJECT OBJECTIVES

Gwent partners are awarded funding from the Local Government Digital Fund to run a project to understand the key objectives below. The focus of the project will be to undertake who in Gwent is most affected by digital exclusion. These factors contribute to their inclusion, digital capability and what digital inclusion would look like for them. Most of the activities would be user research.

- ✓ Present an evidence-based understanding of **who is digitally excluded and why?**
- ✓ Present an evidence-based understanding of **who is at risk of becoming digitally excluded and why?**
- ✓ Identify existing digital exclusion activities and review their effectiveness and impact
- ✓ Present recommendations and actionable next steps on how the Gwent Partners can implement measures to address the digitally excluded and preventative measures for those at risk of becoming digitally excluded

### Digitally excluded people are likely to be:

#### Older adults

41% of people over 75 have basic digital skills, compared with 87% of 16–49-year-olds.

#### Homeless people

Many people in these situations do have access to mobile devices and may face issues of affordable connectivity rather than complete exclusion from digital services.

#### Welsh speaking people and others who do not use English as their first language

Digital systems and their associated support processes need to be designed to accommodate the needs of Welsh speakers and speakers of common minority languages.

#### Those with lower educational attainment

93% of those with qualifications at degree level or above demonstrated all five digital skills compared with 51% of those with no qualifications.

#### Lower income individuals and families

Those who are economically inactive are less likely to visit a website (71%) than those in employment (82%). Lower income families and individuals may be affected by access to and affordability of devices and connectivity.



#### People with disabilities or long-term health conditions

89% of people with a disability or long-term health condition use the internet, compared with 93% of those without. People with disabilities may require help in identifying appropriate assistive technologies.



#### People in rural areas

People living in rural areas who are not online are usually excluded due to problems in broadband provision, both for fixed line and mobile broadband services. There are still many areas of Wales affected by not-spots.

What are the Welsh internet 'not-spots'?



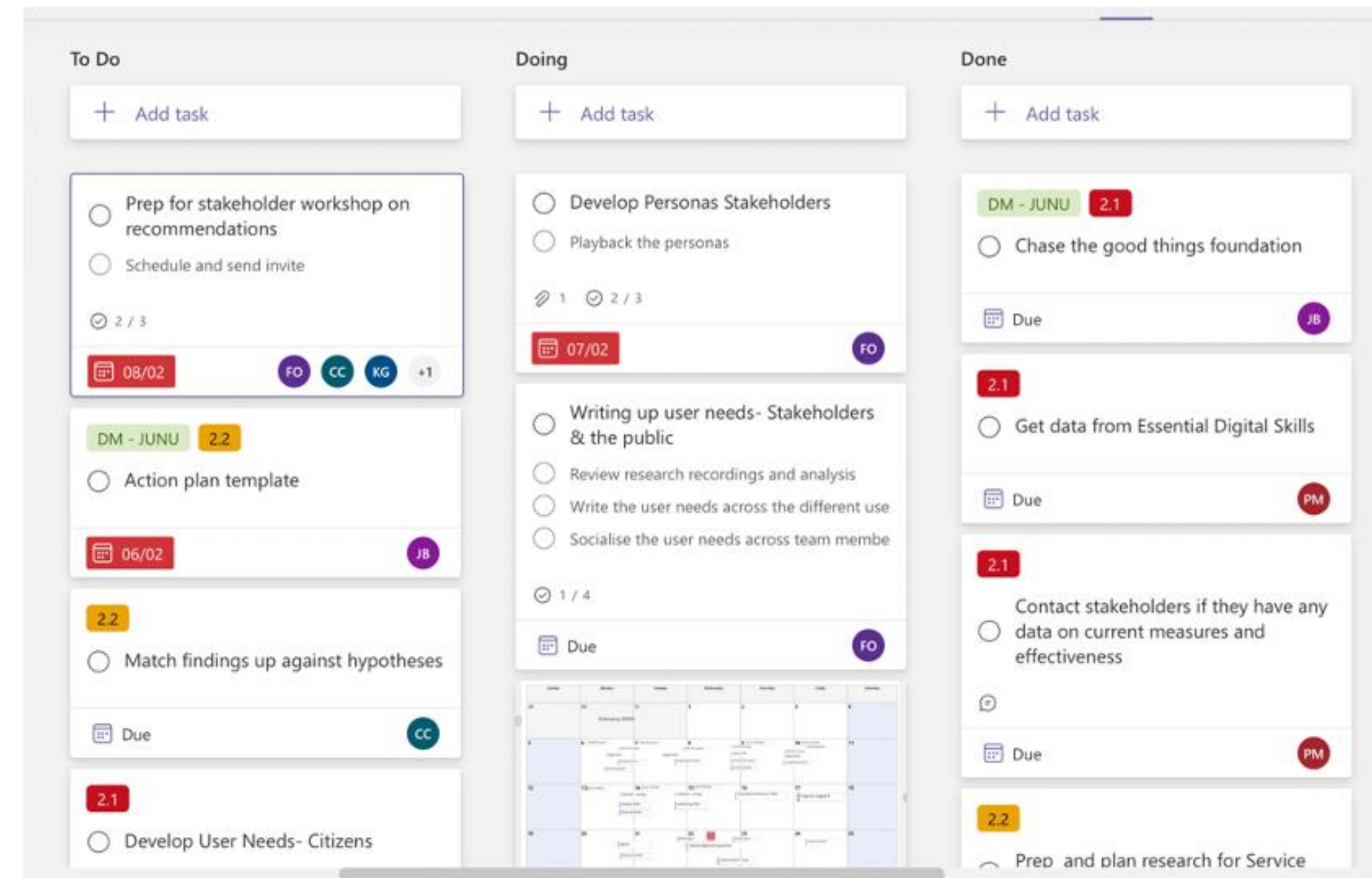
# PROJECT APPROACH

## METHODOLOGY



Our methodology is founded upon the Centre for Digital Public Service (CDPS) delivery standards in conjunction with the Local Digital Declaration. To implement this, we employed an Agile, iterative approach spanning a period of nine weeks, comprising three sprints and daily stand- ups.

Our methodology also involved conducting meticulous desktop and field research, administering surveys, and analysing the acquired data to formulate well-founded recommendations.





# Sprint Phases



## Sprint One: 3<sup>rd</sup> Jan – 23<sup>rd</sup> Jan

The initial phase involved conducting comprehensive desktop research and planning for the research approach



## Sprint Two: 24<sup>th</sup> Jan – 10<sup>th</sup> Feb

Recruit participants for user research and draft customer contact and digital skills survey



## Sprint Three: 13<sup>th</sup> Feb – 3<sup>rd</sup> March

Conduct field research, launch survey and analyse findings followed by recommendations





# TEAM MEMBERS

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**Junu**

Delivery Manager



**Chloe**

Senior User Researcher



**Pramod**

Data Analyst



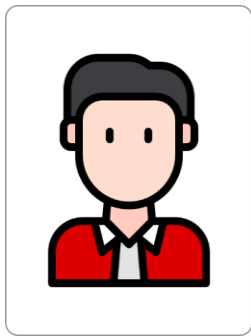
**Kelby**

User Researcher



# STAKEHOLDERS

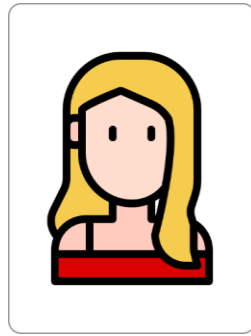
## LOCAL AUTHORITIES



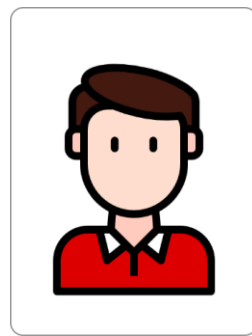
Torfaen  
Customer & Digital  
Delivery Lead



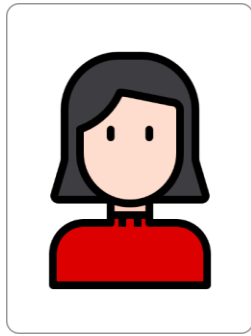
Torfaen  
Customer & Digital



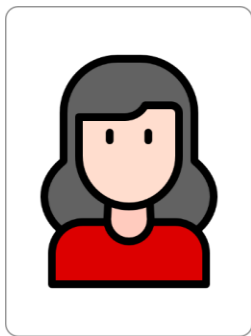
Newport  
Digital Services  
Project Officer



Newport  
Digital Services  
Manager



Blaenau Gwent  
Service Manager,  
Customer Experience &  
Transformation

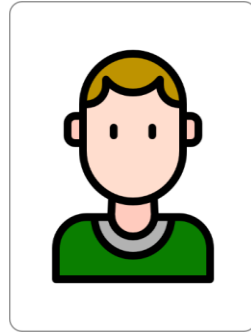


Monmouthshire  
Head of Digital,  
Design and Innovation



Caerphilly  
Adult Community Learning

## SERVICE PROVIDERS



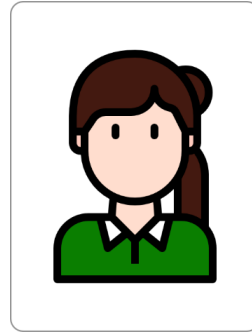
Digital Inclusion and  
Skills Programme  
Board



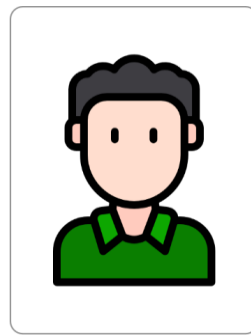
Digital Inclusion  
Alliance for Wales &  
Digital Communities  
Wales (DCW)



Good Things  
Foundation



Audit Wales



The Shared Resource  
Service (SRS)



CWMPAS

# DESKTOP RESEARCH



## Review

Office of National Statistics (ONS) Data

National Survey of Wales

Ofcom Report

Digital Exclusion Risk Indicator (DERI) Score

Caerphilly Report

Audit Wales



# DEMOGRAPHICS

	Local authority						
Data	Blaenau Gwent	Caerphilly	Monmouthshire	Newport	Torfaen	Source	
Population	69700	181100	94200	152800	91300	ONS	mid 2020
Age 65 and over	19.8%	16.6%	25.1%	16.8%	19.3%	ONS	mid 2020
Ethnic minorities	1.3%	1.8%	2.3%	7.2%	1.4%	ONS	mid 2020
Unemployment	6.8%	5.6%	3.6%	5.9%	4.4%	ONS	September 2021
Free school meals	28.3%	17.9%	11.4	20.6%	15.9%	Welsh Gov	2020/2021
Pupils at least 5 GCSEs	46.4%	51.8%	65.5%	52.8%	57.5%	Welsh Gov	2019/2020
Median weekly income before tax	£479	£506	£615	£516	£536	ONS	2020
Homes with 'Superfast' Internet available	98.9%	96.9%	95.3%	97.1%	98.4%	Ofcom	May 2021
Households with no internet access	7.3%	4.8%	4.4%	4.4%	4.8%	Welsh Gov	2021

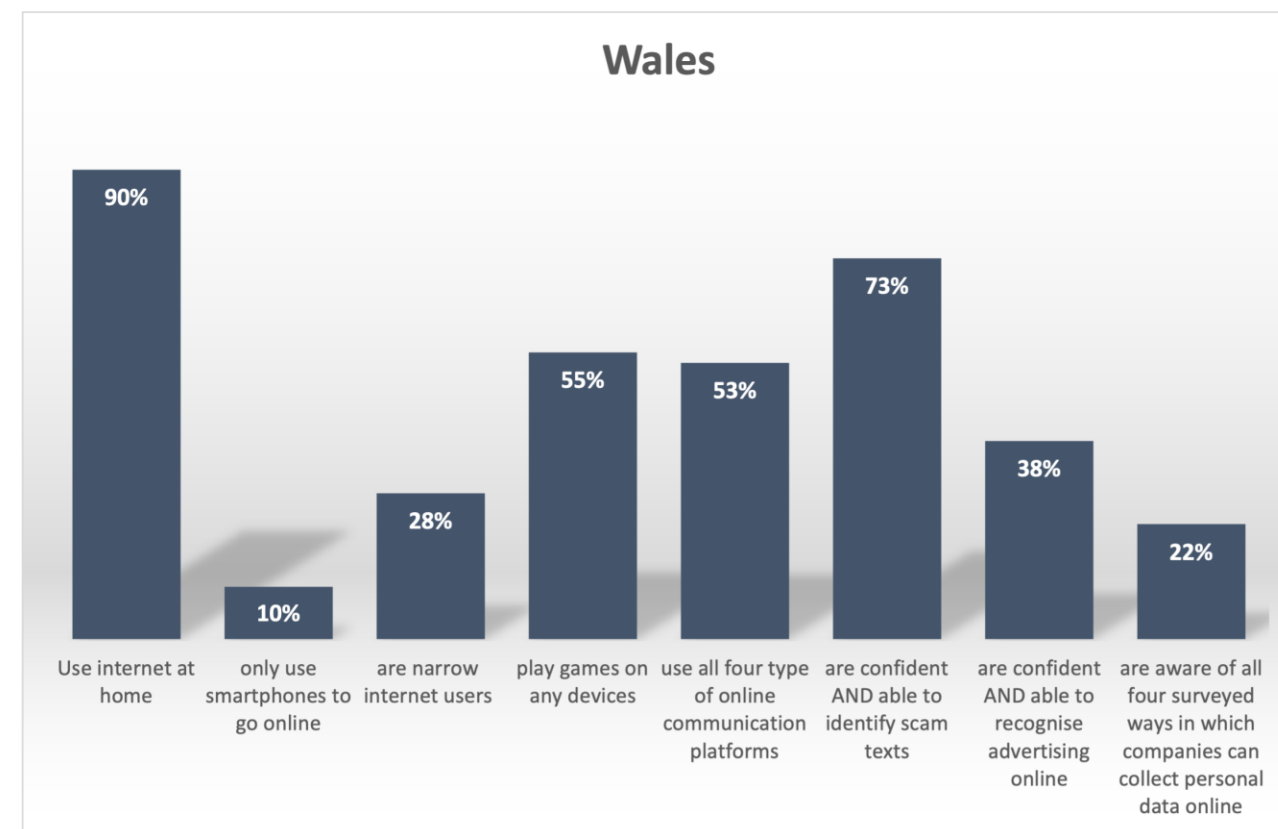
## Summary

Monmouthshire has the highest percentage of the elderly population, while Caerphilly has the lowest. Monmouthshire also has the highest percentage of pupils achieving at least 5 GCSEs, while Blaenau-Gwent has the lowest.

Regarding unemployment, Monmouthshire has the lowest rate, while Blaenau Gwent has the highest. It is worth noting that the unemployment rates in all five local authorities are below the UK national average of 4.6% (as of September 2021).

# THE DATA

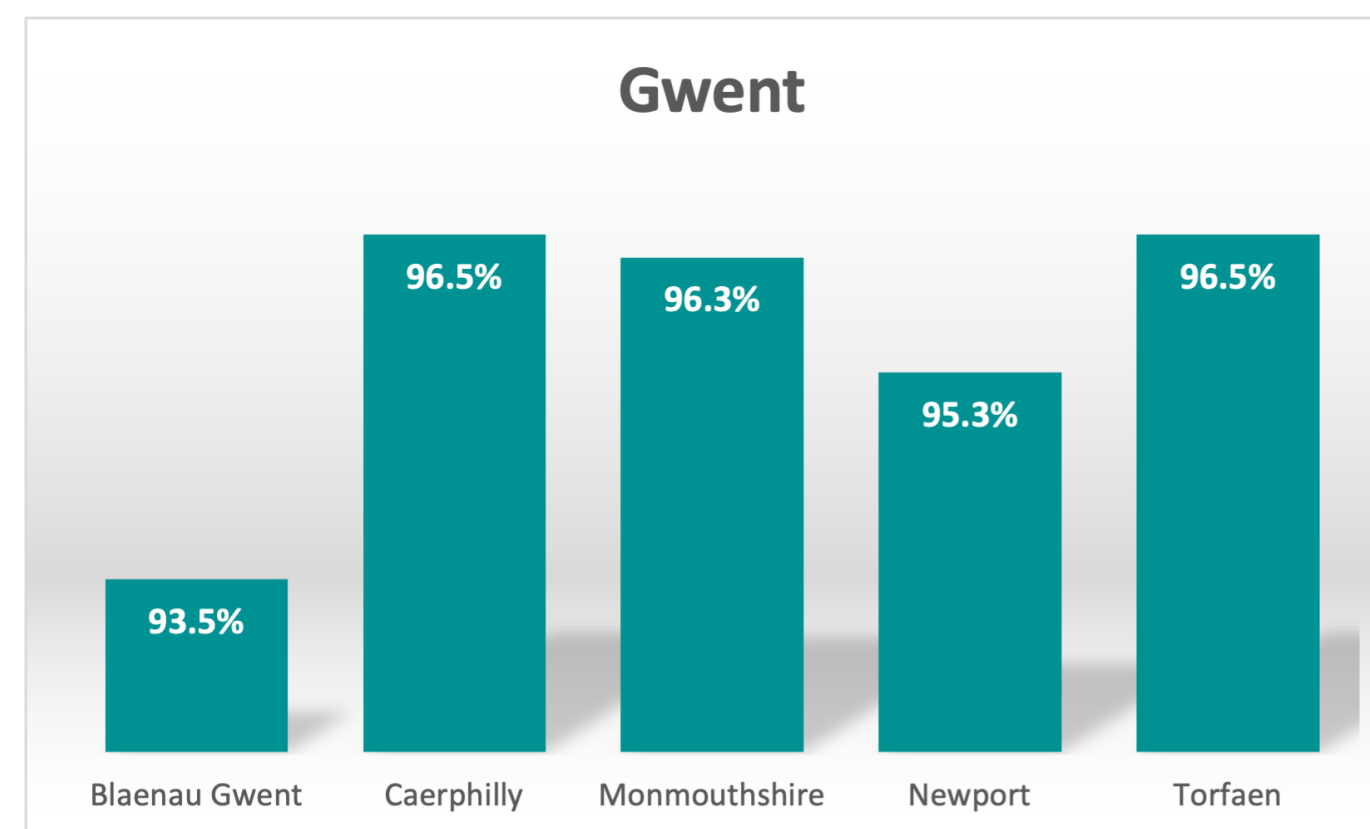
## Wales



**90%**

In Wales, 90% of individuals use the internet at home, whereas only 10% access it via a smartphone.

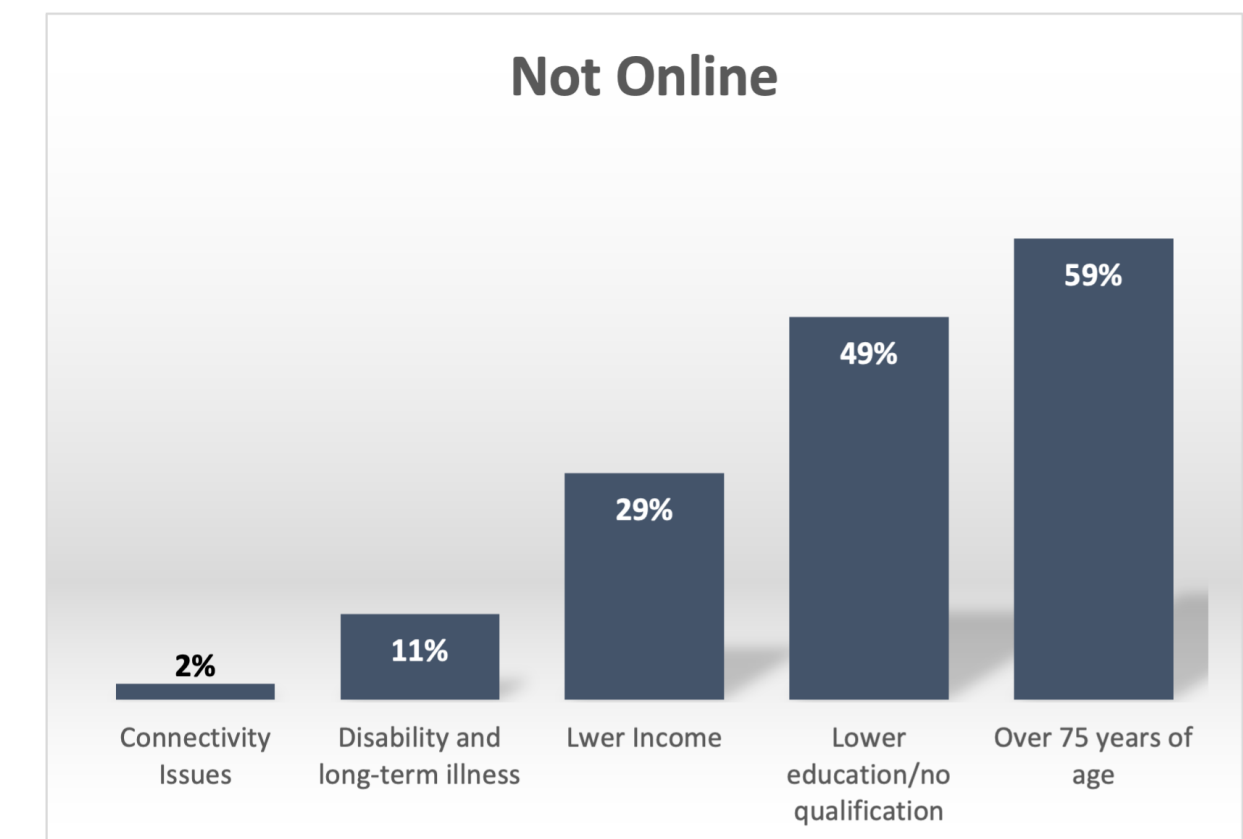
## % of access to superfast broadband



**93.5%**

The percentage of premises in the five council areas with access to superfast broadband, with the lowest rate of 93.5%, is found in Blaenau Gwent.

## Reason for not being online



**59%**

Of the total population of 180,000(7%), 2% experience connectivity issues. 59% of the elderly population is affected by digital exclusion, which means they do not have access to or cannot use technology effectively.



# AFFORDABILITY

## Summary

According to the recent report by Ofcom, there has been an increase in the number of individuals who are either unable to afford broadband or are opting to switch from landline to mobile service

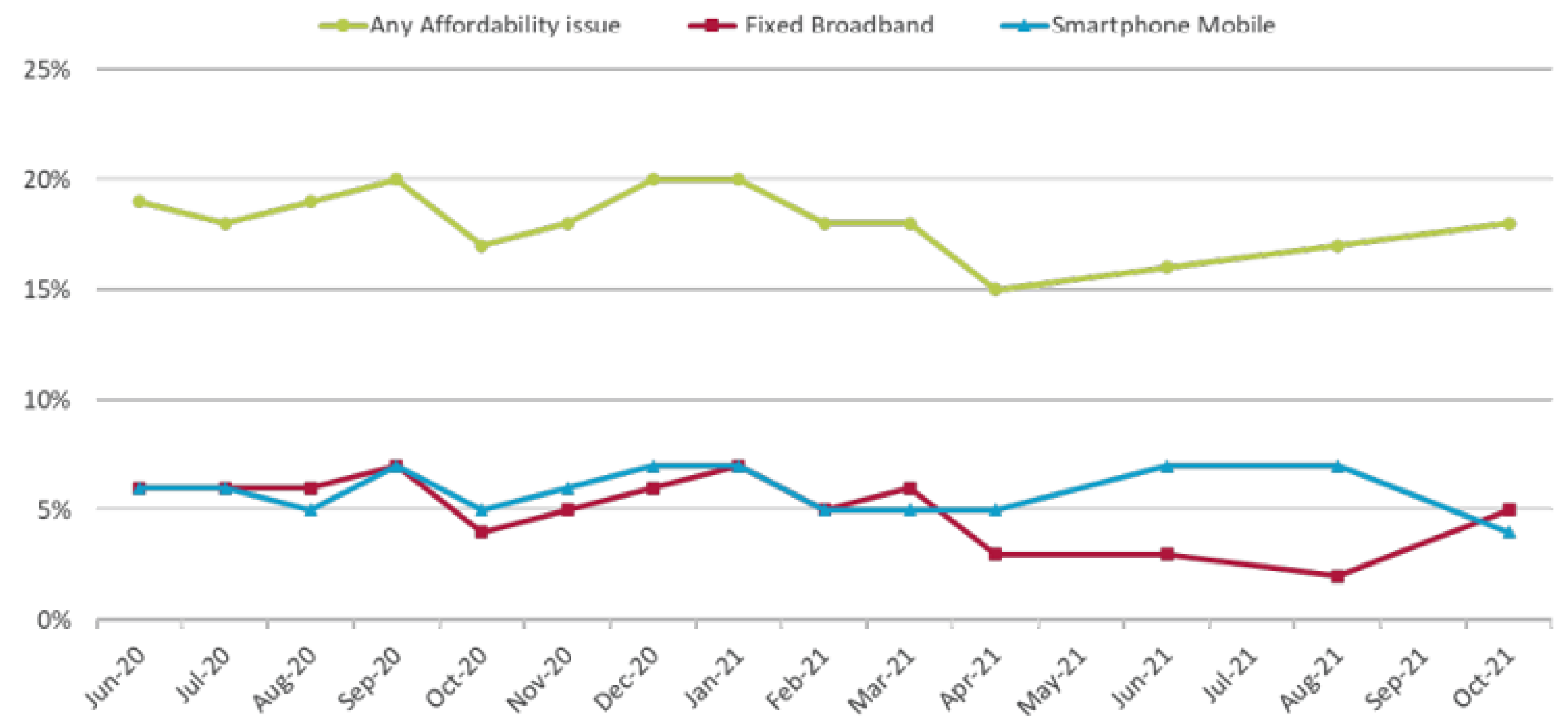


74% of people believe there is no need for them to go online therefore are unlikely to go online in the next 12 months. While 11% said using the internet is costly.



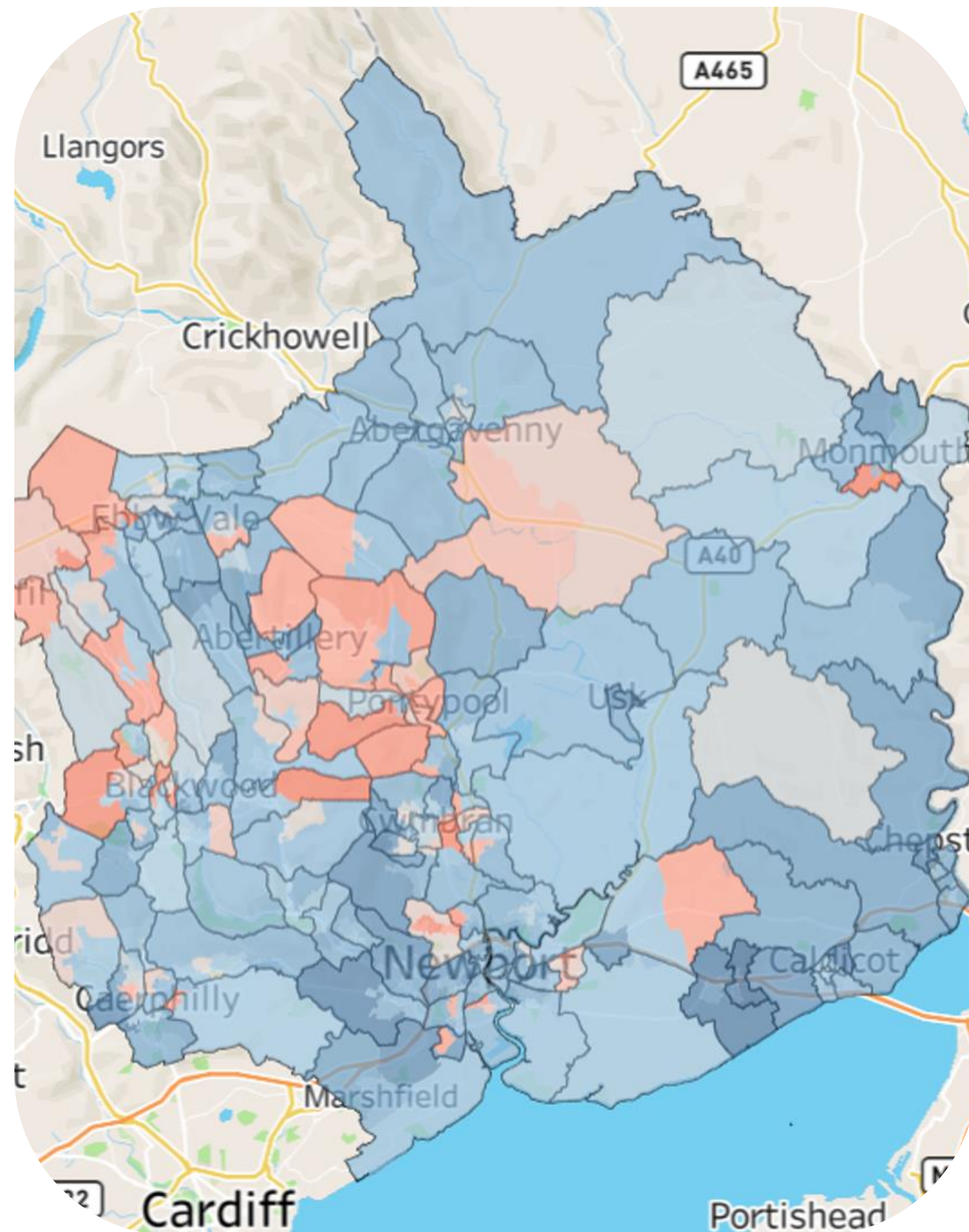
As of October 2021, data indicates that affordability has been less of a concern for people accessing the internet. However, other recent data suggest that with the rising cost of living in 2023, affordability may once again become a significant barrier for individuals to go online.

### Trend in experience of affordability issues





# SETTING A BASEPOINT



## DIGITAL EXCLUSION RISK INDICATOR

Using the Digital Exclusion Risk Index (DERI) map server as a basepoint, we could select the areas in Gwent most at risk of digital exclusion.

The information provided around Broadband availability and Deprivation allows us to draw hypotheses around the possible causes of Digital Exclusion. This allowed us to plan an effective research strategy and test the hypotheses in the field.

We decided on a previous map server version for the basepoint to get an accurate measure of the success of interventions that have been put in place. By comparing this and future versions of the server data, we can see if the risk of Digital Exclusion has been reduced.



# HYPOTHESES

## Information

A hypothesis refers to a tentative statement or assumption that proposes a possible explanation for a user behaviour, need, or problem. Hypotheses are typically formulated based on prior knowledge, observations, or data analysis, and they serve as a starting point for further investigation or testing.

In the context of the Digital Exclusion project, we have based our hypothesis on a prior understanding of the subject, Interviews with Key stakeholders and Service providers alongside data from various sources.

### #1 Circumstances & characteristics of residents at risk of digital exclusion have already been identified and well documented

We believe that **previous research into Digital Exclusion, and specifically within Gwent**, clearly shows the **groups that are most at risk of being digitally excluded**, and **recommends services** for those groups.

because previous research is **well-resourced** and **referenced**, and also **recent**.

This will be disproved if, **during our research**, we come across groups that have not been **included in previous reports** (although this is unlikely to be the main aim of our research)

**Very confident**  
there is a lot of evidence to support this hypothesis

**Fairly confident**  
there is some evidence to support this hypothesis

**Not confident**  
there isn't much evidence to support this hypothesis

#### Resources

[Caerphilly county council research](#)

[Bridging the digital divide in Wales - Centre for Digital](#)

[Digital Inclusion in Wales](#)

Relevant to this hypothesis

### #3 Even if excellent broadband connection is available, people in deprived areas will struggle to afford it

There are areas of Gwent that have **good broadband** connectivity, but **very high deprivation** - in these areas, we think that digital exclusion will still be high

Because residents of areas with high deprivation tend to be poorer, and therefore may **not be able to afford a home broadband and/or the devices needed to access the internet**

This will be disproved if we find **that residents of these areas have good home wifi and reliable devices**

**Very confident**  
there is a lot of evidence to support this hypothesis

**Fairly confident**  
there is some evidence to support this hypothesis

**Not confident**  
there isn't much evidence to support this hypothesis

#### Resources

[Charity Digital Research](#)

[Caerphilly county council research](#)

### #5 Older adults in Gwent are least at risk of remaining digitally excluded

We think, although older adults are an at-risk category, they are **less at risk of remaining digitally excluded when compared to other at risk categories**

because **rates of digital exclusion dropped** in this group during the **Covid-19 lockdowns**, and because **there are more services and provisions** geared towards older Gwent residents than any other at risk group

This will be disproved if **uptake of those services is low**, or **data shows that older people are not accessing digital services** in these areas

**Very confident**  
there is a lot of evidence to support this hypothesis

**Fairly confident**  
there is some evidence to support this hypothesis

**Not confident**  
there isn't much evidence to support this hypothesis

#### Resources

[Caerphilly county council research](#)

[Welsh Digital Companions Scheme](#)

[Charity Digital Research](#)

### #2 Cost will be a main, increasing factor in digital exclusion

We think **low household income / economic inactivity** will be one of the major contributing factors to digital exclusion in Gwent, and will be increasing

because this **user group has already been identified as at risk of digital exclusion**, and the **cost of living is rising dramatically**, meaning people won't be able to afford devices and/or home broadband

This will be disproved if we find that users with low household income are **more likely to prioritise technology and/or home broadband over other expenses**

**Very confident**  
there is a lot of evidence to support this hypothesis

**Fairly confident**  
there is some evidence to support this hypothesis

**Not confident**  
there isn't much evidence to support this hypothesis

#### Resources

[Caerphilly county council research](#)

[Charity Digital Research](#)

Relevant to this hypothesis

### #4 Residents will be accessing the internet via smartphones more than any other device

We believe that, due to the cost of living, an **increasing number of people will only have access to a smartphone**, as opposed to a **desktop computer or laptop, or perhaps even tablet**

because previous, recent **research shows that an increasing number** of digitally included people in **Caerphilly** are **accessing the internet solely via a smartphone** due to the **costs of home broadband and devices**

This hypothesis will be disproved if **site analysis shows no change** in the types of devices people use to access services

**Very confident**  
there is a lot of evidence to support this hypothesis

**Fairly confident**  
there is some evidence to support this hypothesis

**Not confident**  
there isn't much evidence to support this hypothesis

#### Resources

[Caerphilly county council research](#)

[Charity Digital Research](#)

[Welsh Digital Companions Scheme](#)

### #6 The main causes of digital exclusion differs with age

In older adults, **the main barriers to digital inclusion will be emotional**: lack of confidence, or fear. **In younger people, it will be financial**; the cost of a device, home broadband connection or mobile data.

the **cost of living is rising**, and previous research shows that **financial pressures are the main reason why the under 35s** could be digitally excluded.

This hypothesis will be proved wrong if we find that the **reasons for digital exclusion** are the same **regardless of the age of the participants**

**Very confident**  
there is a lot of evidence to support this hypothesis

**Fairly confident**  
there is some evidence to support this hypothesis

**Not confident**  
there isn't much evidence to support this hypothesis

#### Resources

[Caerphilly county council research](#)

[Charity Digital Research](#)



# STAKEHOLDER INTERVIEW

## Local Authorities(LA)

We interviewed the Key staff members from the five local authorities in Gwent to gain insight into the Council's perception of digital exclusion and the extent of the issue, as well as to learn more about solutions that had been implemented. A lack of digital skills and access to technology, the impact of deprivation and age on digital exclusion, and the need for interventions to address these issues were common themes that emerged.

Although some programs and initiatives to address digital exclusion, such as digital skills courses and device loaning, exist in certain areas, their success is sometimes unclear, and funding can be an issue. Improved data on digital exclusion and more transparent communication about interventions are identified as critical needs.

Access to technology is being improved by providing public Wi-Fi within Libraries and community hubs, loaning tablets, and providing access to data SIMs.

The pandemic has exacerbated digital exclusion, with some people losing jobs and experiencing financial hardship, making it even more difficult to access technology and develop digital skills. Better communication and collaboration between organisations and stakeholders working on digital exclusion, sharing best practices and resources, and identifying areas where there may be duplication of effort, are needed.

The consensus was that digital exclusion is a complex and multifaceted issue that requires a range of interventions and ongoing efforts to address, including improving access to technology and digital skills and addressing underlying issues such as deprivation and low motivation due to age.

# STAKEHOLDER INTERVIEW

## Service Providers

Conversations with organisations providing measures to mitigate digital exclusion revealed that deprived areas such as Caerphilly, Newport, and Blaenau Gwent, as well as older people, those in social housing, and the unemployed, are particularly at risk. Lack of access to equipment and services, skills, and connectivity are significant barriers to inclusion. Interventions include:

- Working with private and public organisations
- Digital training of staff and volunteers.
- Providing access support in community settings.
- Raising awareness of the importance of being online.

The Welsh Government leads policy on Digital Inclusion and basic digital skills, with the Digital Communities Wales (DCW) programme addressing device connectivity, data skills, and the minimum digital living standard. The DCW works with local authorities, health boards, and other organisations to increase digital exclusion awareness and support for those who are excluded.

The service providers highlighted the importance of addressing motivation, trust issues, lack of confidence, access to affordable broadband and mobile contracts, and reduced access to banking services. Initiatives such as the interactive map and resources for friends and family to help those digitally excluded are important.

The pandemic has increased the problem but also led to a shift in over-65s becoming digitally included, and the profile of someone who is included or excluded can change over time.

Overall, coordinated efforts and interventions from various organisations and stakeholders are necessary to ensure that everyone can use technology to fit their individual needs, and a digital strategy that includes digital inclusion is needed.



# FIELD RESEARCH

Blaenau Gwent -  
Tredegar library  
and Adult Learning  
Centre

Caerphilly - Adult  
Learning Centre

Torfaen - Cwbran Library

Monmouthshire -  
Cwbran Library

## Human Stories

During our field trip, we conducted visits and interviews with multiple individuals in various locations throughout Gwent to comprehend their transition to digital technologies and their underlying motivations. Our encounters with these individuals were diverse, providing an abundance of insights and opportunities for learning.





## No more “shh, you’re in a library”

The study revealed that the services provided by libraries are invaluable, extending beyond digital skills lessons. Knitters in the knitting circle used Facebook Messenger to communicate during the week. Socially included library users were more likely to engage in digital activities and seek help from friends. Even non-digital users became digitally included through social inclusion.



# HUMAN STORIES

## Nana Jean

is An 85-year-old avid knitter who has recently embarked on a digital journey. Three years ago, her grandson encouraged her to purchase an iPad and learn how to use it. She enrolled in Digital Skills classes and has been doing everything online, including shopping, booking holidays, checking the weather, and staying informed. Jean sees herself as a "proficient beginner" in the digital world and is always eager to learn more.

Her favourite thing to do with her iPad is video call her granddaughter, who is studying at university. They keep in touch through social media as well. Jean used typewriters and adding machines in her early career but has adapted and embraced new technology. Her granddaughter teaches her new things and helps her stay up-to-date with the latest trends. Nana Jean proves there is always time to learn something new and embrace the wonders of technology.

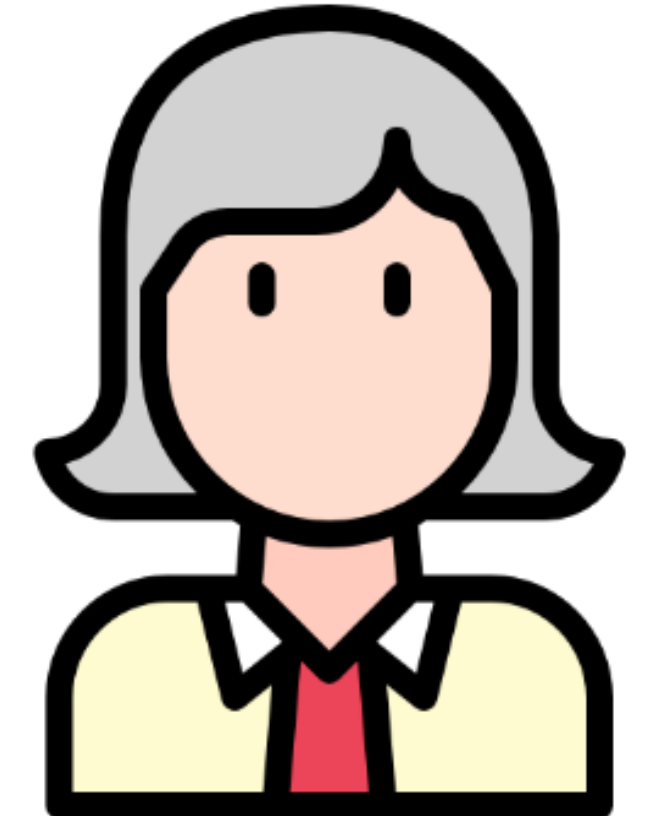


## Jillian

Lorem is a 70-year-old retiree who is an active member of the Monmouth Library Knitting Circle. She has a range of digital skills and uses her smartphone to stay in touch with family, download patterns, and sell items online. She also uses her iPad and laptop at home.

Jillian is a source of advice for her fellow crafters and often shares tips on using WhatsApp Group. Despite this, her confidence level is still lacking, and she sometimes hesitates to use her devices in front of others. However, with the help of her fellow crafters, she's becoming more proficient with her devices and building her confidence.

Jillian's story is a testament to the benefit of a supportive community in building digital confidence and learning new skills. She has access to many different devices and Superfast broadband at home and enjoys watching shows on Netflix on her TV. With the proper support, she can make the most of them..



## Sister John & Siter Smith

Two young women, who are missionaries for the Church of Jesus Christ of Latter-day Saints, were using the Wi-Fi provided by Monmouth Library on their phones to conserve their data usage. As missionaries, they only use the Internet for work and communicating with family members who are part of the church but live in other countries.

The sisters found their phones faster and more reliable than the computers available in their church, and they were content with using their phones for all their digital needs. They could research, communicate, process documentation, and even write essays on their phones.

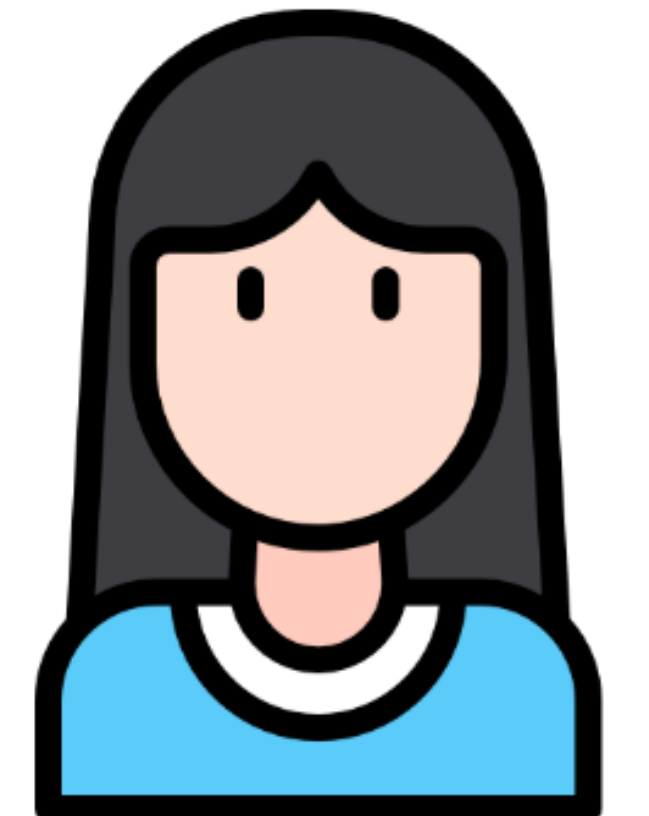
Their story is a reminder that digital inclusion is not just about having access to the latest technology but also about using technology in a way that meets your needs. The library's Wi-Fi was a valuable resource for them, and they were grateful to have it available.



## Catherine

Is a member of the Monmouth Library knitting club. She's a widow who continued to use her husband's email after he passed away. Initially had reservations about using the internet but has since taken part in Digital Skills classes and improved her digital skills. She uses her iPad to search for events and information about books, access online singing training for her choir group, and do online banking.

Catherine prefers using WhatsApp or text messages to keep in touch and finds online shopping convenient. She is reluctant to use the library's Wi-Fi due to its unreliability. Catherine's journey is a reminder that digital inclusion is not just about being able to use technology but also about feeling comfortable and confident using it. Despite some reservations, she has found ways to use the internet that work for her and make her life easier..



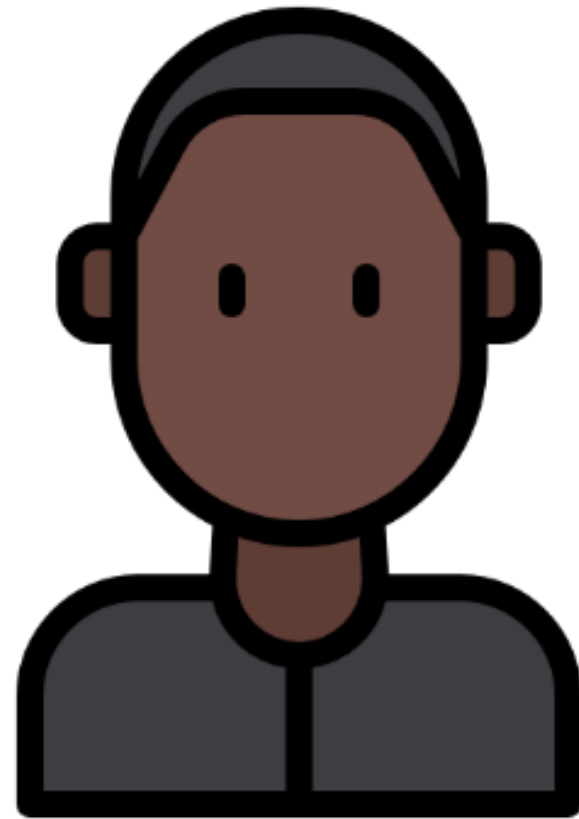
# HUMAN STORIES

## Nathaniel

is a busy young man who heavily relies on his smartphone for everything. He can't afford or doesn't want broadband at home, so he makes do with the data on his phone plan. He uses his smartphone to check his emails, stay connected with his friends and family, and even watch movies on it.

Whenever he needs to use a PC or print, he goes to his local library in Cwmbran. Nathaniel knows the librarians well. He logs in to an available computer and does what he needs to do without wasting time.

Nathaniel is happy with his simple lifestyle and doesn't see the need for a computer at home. He prefers to spend his free time exploring the city, going to the gym, or just relaxing with a good book. His smartphone is all he needs, and he is content with that.



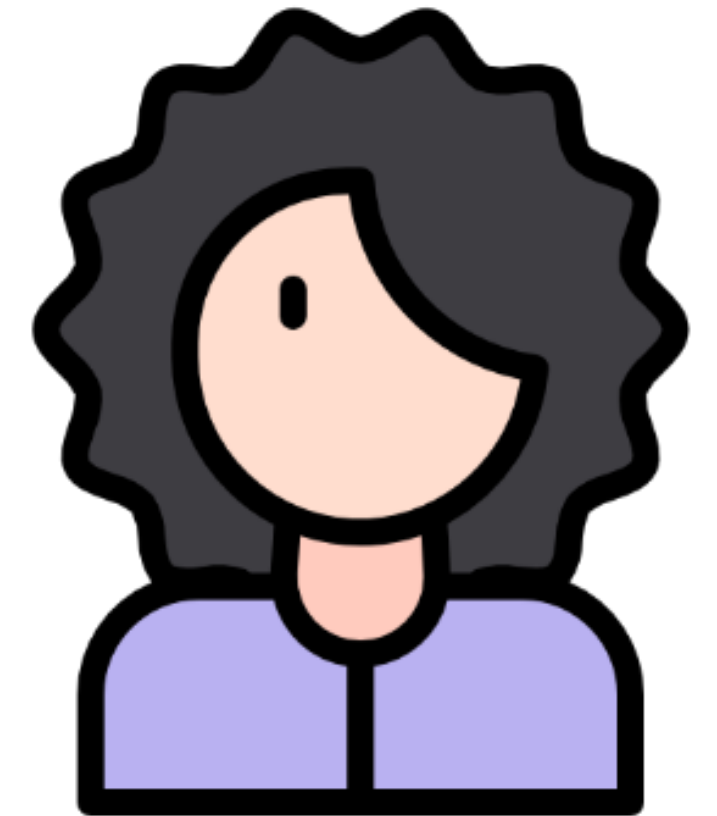
## Michael & Vanessa

Michael and Vanessa had always been a hardworking couple, striving to provide the best for their young child. However, their financial situation worsened when Michael lost his job as a bar manager due to cost-cutting measures. To make ends meet, they had to make some sacrifices, including getting rid of their home internet service.

Determined to find a new job and ensure the family was taken care of, Michael used the library's PCs to search for job openings and apply for positions online. Vanessa was there by his side, offering encouragement and support.

Despite the setback, Michael remained positive and hopeful, confident that he would find a new job soon. He worked diligently at the library, sending out resumes and filling out job applications while Vanessa cared for their child.

The couple was grateful for the library's resources and support, which helped them stay connected to the online world even without home internet access. With hard work and perseverance, Michael and Vanessa knew they could overcome their difficulties and build a better future for their family.



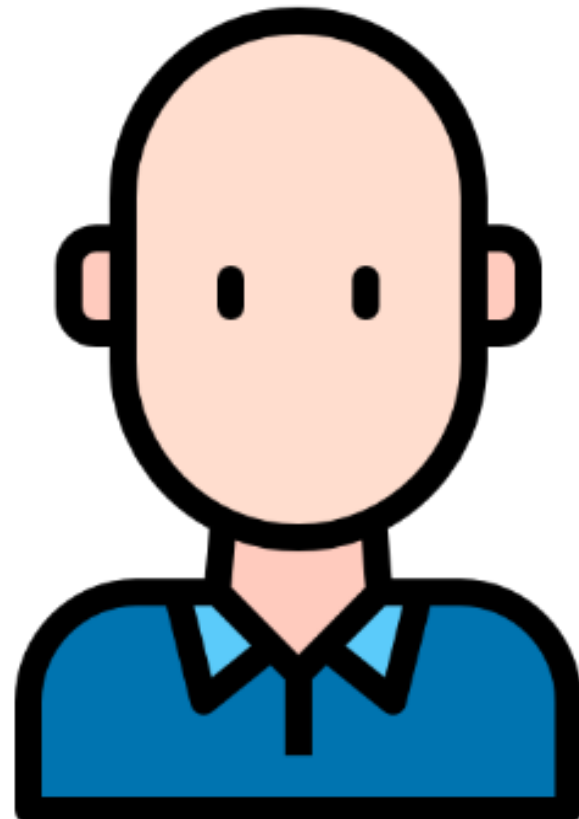
## Colin

is a passionate hobbyist artist who loves creating art on his old Windows 95 computer using Paint.

Recently, Colin has taken on a new project to create "correct" blueprints of the Nautilus, a submarine made famous by Jules Verne's classic novel "Twenty Thousand Leagues Under the Sea." Colin is convinced that the original blueprints have technical issues that could put the crew in danger, and he wants to create a more accurate representation.

Unfortunately, Colin's old computer is not powerful enough to handle other software, and he can only use Windows Paint to work on his project.

To transfer his work from his computer, Colin visits his local library and uses their computer to copy photos of his plans onto a flash drive. Although he is limited by his computer's capabilities, Colin's passion for his art and his dedication to his project inspire him to continue creating and improving his blueprints.





# HUMAN STORIES

## Digital Skills Class Blaenau-Gwent

The digital skills students in Blaenau-Gwent are learning about office apps, such as how to search, send emails, and type. The age range of the students is between 20 and 83, and the classes help to boost their confidence. Safety online classes are provided through Gwent police, and students have learned how to use PayPal to shop online with eBay. Some students bank online, while others find online banking worrying.

One lady purchased a top-of-the-range laptop to help with her learning, and some students use phones rather than tablets. During the pandemic, some students had to shop online for the first time.

Some use Zoom to do quizzes with family abroad, while others use Facebook to stay connected with family. People also use price comparison websites to find affordable car and house insurance.

One lady joined a WhatsApp sewing group and another for her housing estate. Some don't find council websites easy and prefer to call a human. One student does not want a video call as they don't want to be on camera. Home internet is expensive, so some use mobile for internet access.





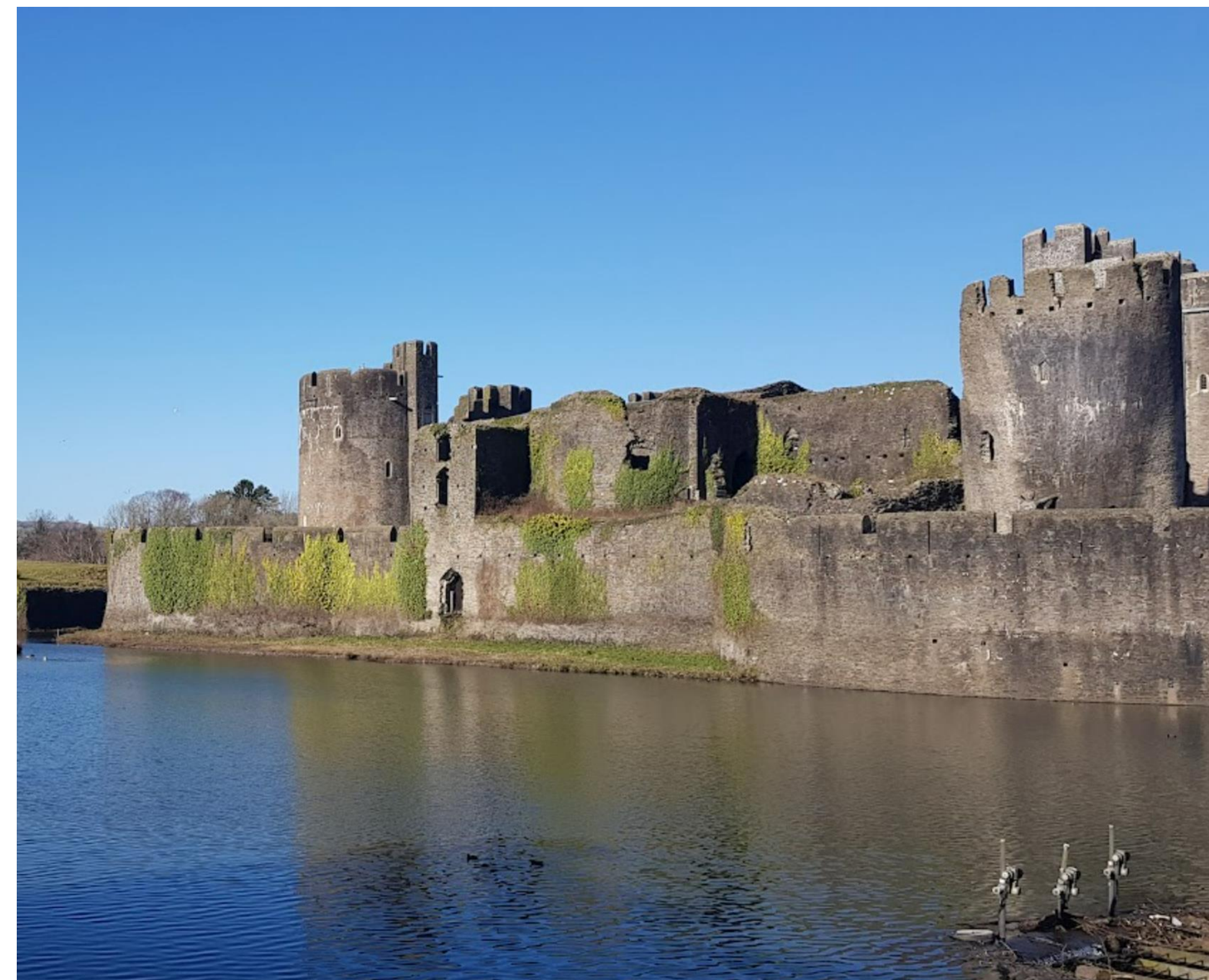
# HUMAN STORIES

## Digital Skills Class Caerphilly

The first student had previously used computers for work and council websites but wanted to learn more about the internet, including searches, banking, and creating and editing videos. They have become more confident through attending the course and now use video calling to see relatives abroad. They are aware of phishing and how to avoid it. They have been on the course for five years and do too much online shopping.

The second student accidentally crashed a digital skills class and has been attending it for four years, finding it 50% social and 50% educational. They now have a tablet, use email, ancestry.com, and shop on Next and Amazon to book holidays.

The final student started on an ILS course but outgrew it and joined Digital Skills. They use the internet to look up train and bus schedules and watch photography tutorials on YouTube. They prefer to pay cash in shops and don't shop online.





# INSIGHTS



## SUMMARY

Digital exclusion in Gwent is a complex problem that requires a comprehensive understanding of the underlying factors that contribute to it. Through research we have been able to create user personas, run surveys to gain deeper insight into Digital skills and reach a method of measuring the success of initiatives that have been put in place.




## User Personas

User personas are fictional representations of a group of users that are created based on research and data analysis. They are used to better understand the needs and behaviours of the target audience and help guide decision-making when designing services.





# USER PERSONA



**Alan 64**  
Full time employed


Low

High

Confidence

Income

Skill level



Uses computer at work


"My phone broke and I can't afford to get it fixed"

"It's hard to keep in touch these days or do my banking without the Internet"

## Alan

Alan is a 64-year-old man currently employed and living on a tight budget. He is moderately confident with technology and had experience using a smartphone before his device broke. However, his financial situation has resulted in him being digitally excluded, as he cannot afford to repair his smartphone or pay for internet access.

Alan's job requires him to use a computer, but he only has access to the company's equipment during work hours. He finds it challenging to keep up with his personal life without a smartphone or internet access, as he cannot check his email or access the internet for online shopping or banking. Alan's primary concern is his financial stability, and he often has to prioritise his expenses. He prioritises bills such as rent, utilities, and food and sees paying for internet access or repairing his smartphone as a luxury he cannot afford



**Mary 68**  
Retired

Low

High

Confidence

Income

Skill level

No device or Internet access

"My grandchildren ask me why I'm not online"

"It looks complicated, I might break something!"

## Mary

Mary is a 68-year-old retiree who is entirely new to technology. She has never used the internet or any devices before, but she is eager to learn. Mary feels left behind by the changing world and wants to catch up. She has no experience with computers, smartphones, or tablets but wants to learn how to use them to stay connected with her family and friends.

Mary is a patient person, but she can become easily frustrated when things are too complicated. She prefers a step-by-step approach and needs clear instructions to understand and retain information. She would benefit from a patient and understanding instructor who can teach her the basics in a way that she can easily understand.

Mary is a retired nurse who enjoys reading, spending time with her family and gardening. She is looking for a way to stay connected with her grandchildren, who live far away, and she would also like to learn how to use the internet to access information about her hobbies.



# USER PERSONA



**Joan 70**  
Retired

LowHigh

Confidence

Income

Skill level

No device or Internet access

"I'm too old to be bothered about computers"


"There won't be anything for me, I've coped so far without it!"

## Joan

Joan is a 70-year-old retiree who has chosen to be digitally excluded. She has no desire to go online and does not see the need for it at her age. Joan is content with her current lifestyle and prefers to do activities she enjoys, such as knitting, reading, and spending time with her family and friends.

Joan is a private person and values her independence. She prefers face-to-face interactions over digital ones and feels that online communication can be impersonal. She sees the internet as a source of stress and negativity and does not want to expose herself to it.

Joan is retired and living on a fixed income, so cost is not a concern. She is happy with her current lifestyle and does not feel the need to change it. She is content with her traditional methods of communication and has no desire to learn new technologies.




**Steve 25**  
Unemployed

LowHigh

Confidence

Income

Skill level



Uses smartphone for social media

"To get a better job I need to know about computers"

"Not sure where to get training I can afford"


## Steve

Steve is a 25-year-old unemployed gardener who is digitally excluded. He was not interested in computers while in school and preferred spending time outdoors. However, after losing his job, Steve realised the importance of technology in today's job market and wants to improve his chances of finding a better job.

Steve is a hands-on learner and prefers a practical approach to learning. He needs a solution that is both engaging and easy to understand. He is interested in learning how to use a computer for basic tasks such as creating a resume and searching for job openings.

Steve's financial situation is challenging, and he cannot afford to pay for expensive courses or devices. He is looking for affordable solutions that will not put him further into debt. Steve is determined to improve his situation and is willing to invest time and effort to learn new skills..


# USER PERSONA




**Carla 44**  
Unemployed on Disability

Low

High

Confidence 

Income 

Skill level 

No device or Internet access

"I can't get out easily due to my disability, the Internet would be great but it's so expensive"

"Feel quite alone at times"

## Carla

Carla is a 44-year-old unemployed individual on a disability allowance who is digitally excluded. Her disability makes it difficult for her to leave her home, and she does not have access to the internet or a device at home. As a result, she feels disconnected from the world around her and cannot access the resources she needs to find a job or improve her skills.

Carla is interested in learning new skills and improving her situation but needs a solution to accommodate her physical limitations. She requires a user-friendly solution that can be accessed remotely and does not require extensive technical knowledge. She is interested in learning how to use a computer for basic tasks such as keeping in touch with family, email, and online applications.

Carla's financial situation is limited, and she cannot afford to pay for expensive courses or devices. She is looking for affordable solutions that will not put her further into debt. Carla is determined to improve her situation, and she is willing to invest her time and effort in learning new skills.



# DIGITAL SURVEY

## Summary

The survey responses indicate a desire for more targeted IT digital awareness lessons due to banks and communities going online. Some want more opportunities to attend classes and continue learning.

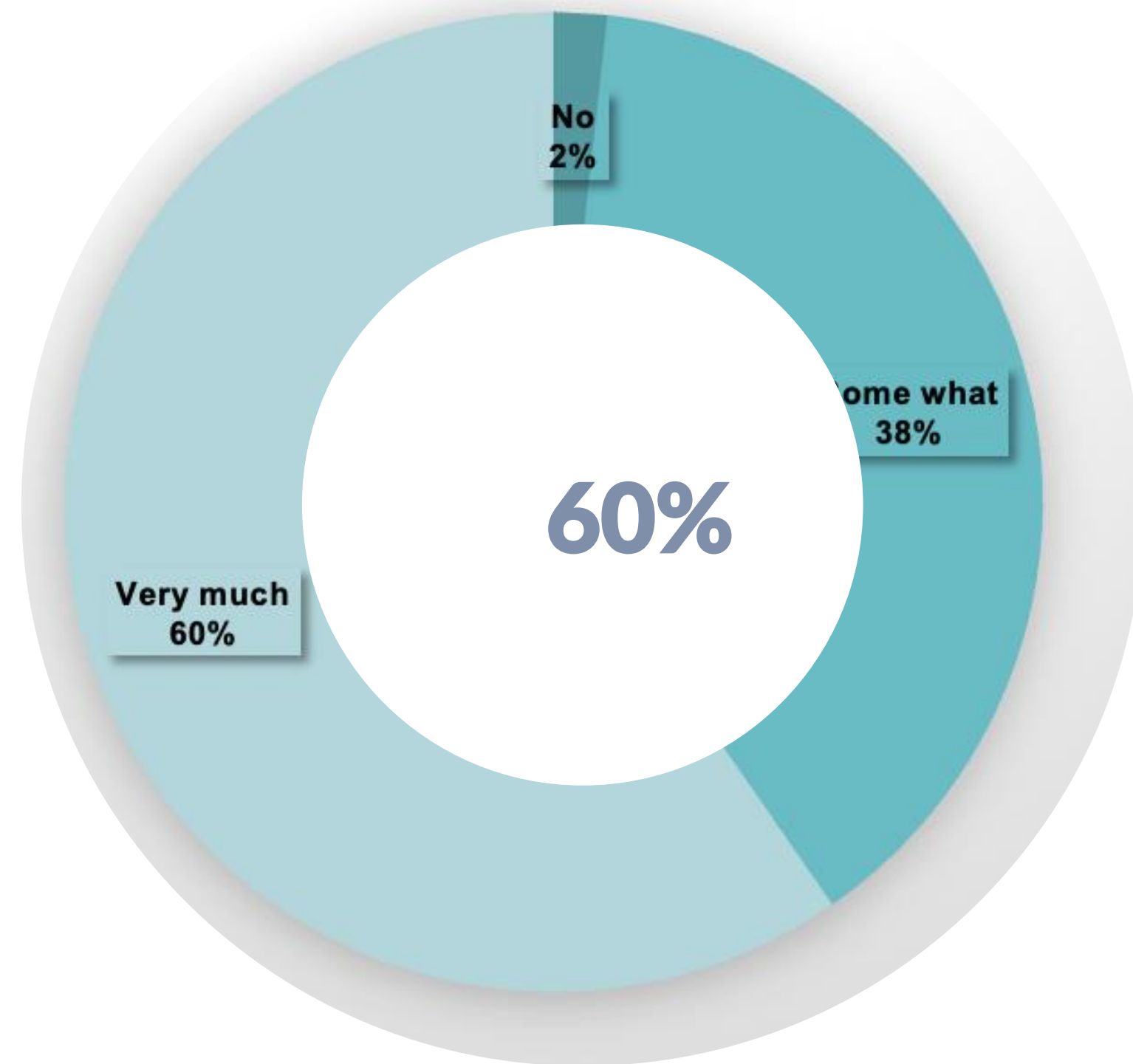
Many respondents have gained confidence through the course; some want more practice and training. Some suggest one-to-one sessions or classes during the school breaks. Others want more practice using digital devices and computer skills, with some wanting more materials in large print.

Overall, respondents are satisfied with the course and want to continue learning to gain more skills and confidence.



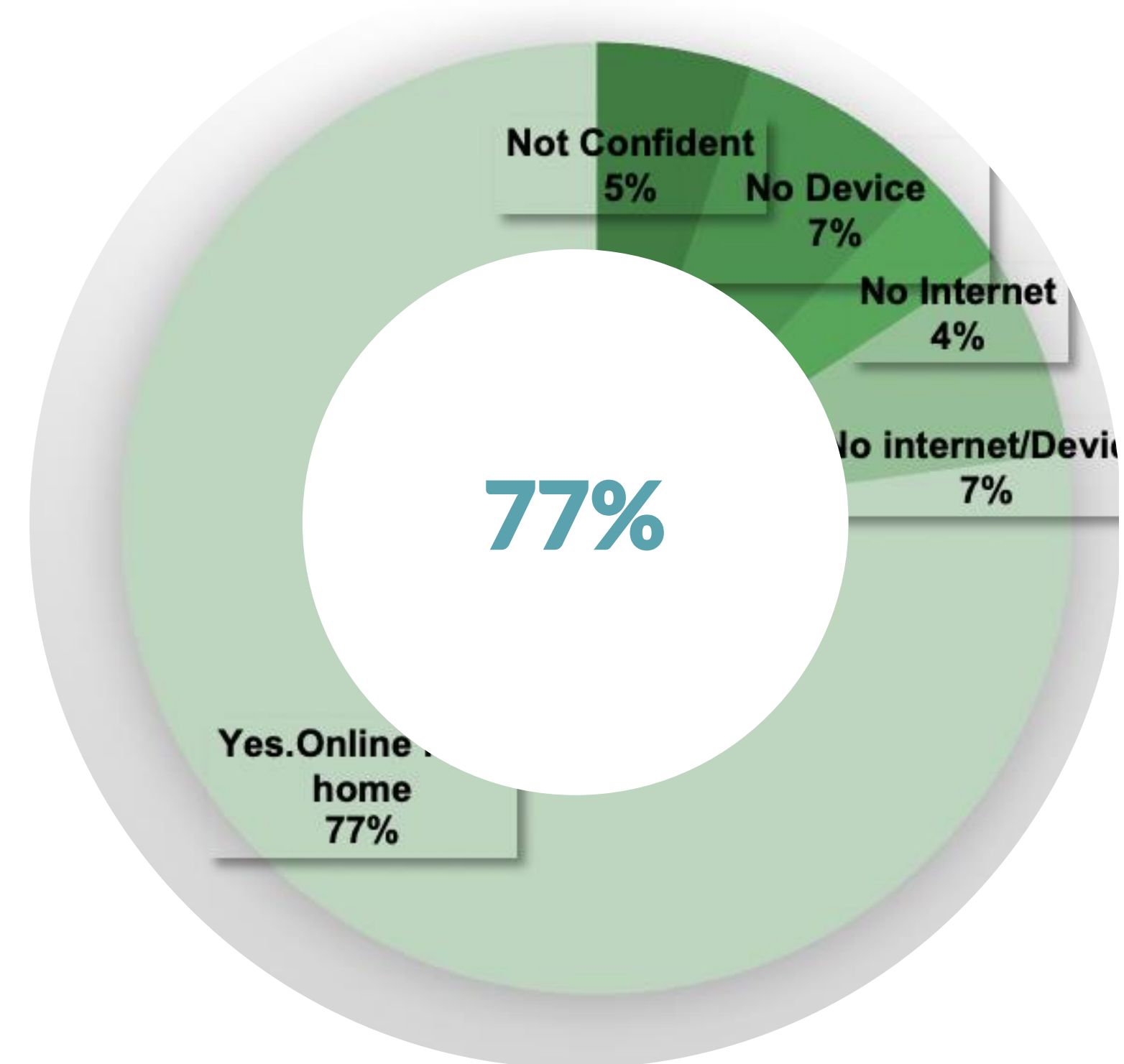


# HIGH LEVEL DIGITAL SKILLS SURVEY



## Improved Digital Skills

60% said their digital skills had improved very much since taking the training .



## Get Online from Home

According to the Digital skills survey 77% can go online from home while 18% have no access to internet or devices at home.

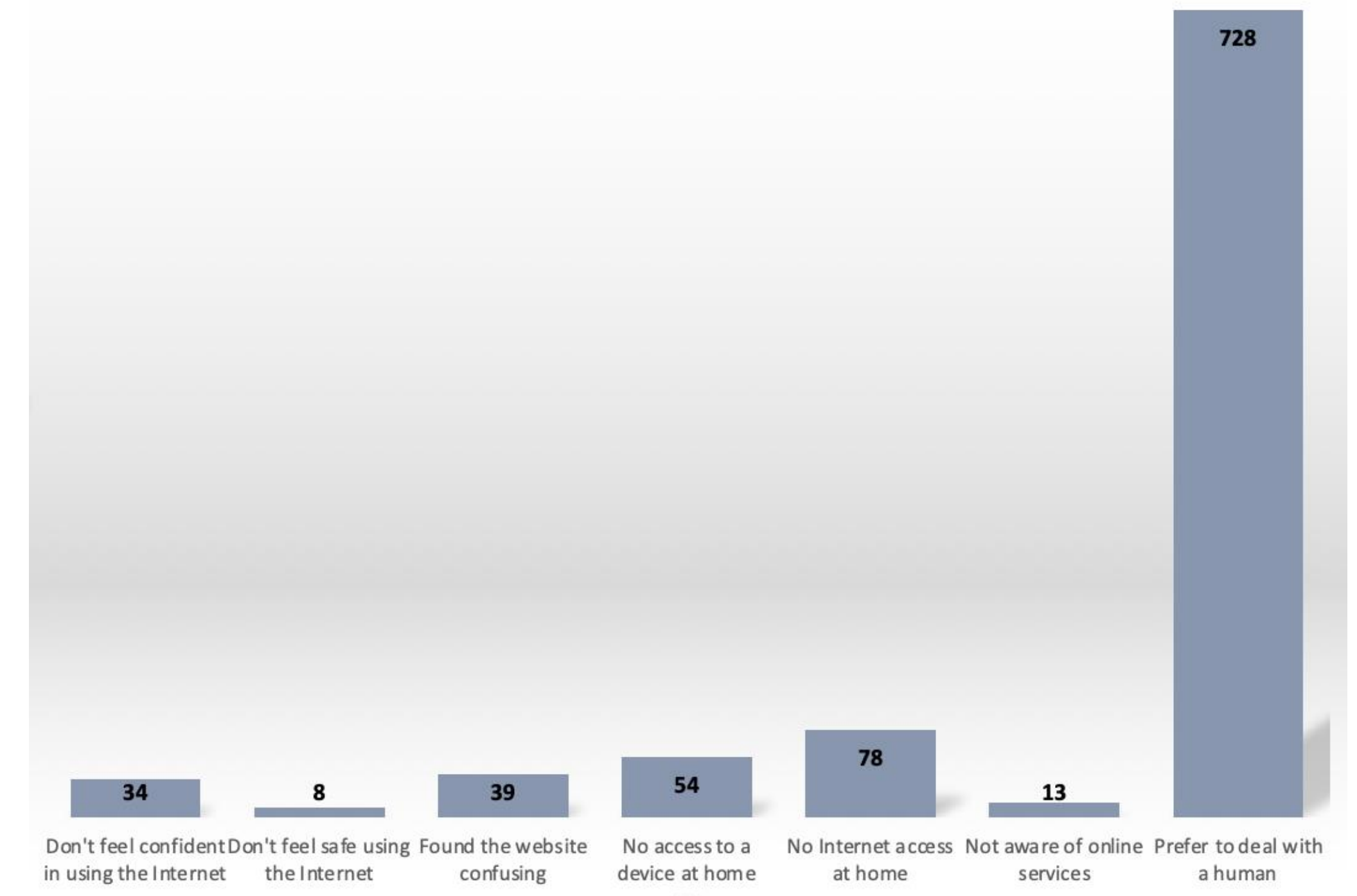


# CUSTOMER CONTACT SURVEY

## Summary

The survey responses indicate that a significant number of respondents (13.8%) do not have access to online services for various reasons, such as not having Internet access or a device at home. Many respondents find the website confusing, and a few feel unsafe or confident using the Internet. Most respondents prefer dealing with a human rather than using online services.

Overall, the survey highlights the importance of addressing barriers to accessing online services and providing support to improve confidence and digital literacy among users.





# INSIGHTS

## Difference with age

Age influences the reasons for digital exclusion or the risk of becoming digitally excluded. Older adults tend to be digitally excluded due to fear or lack of motivation, while younger people and adults are affected by the cost of devices and at-home internet. Although younger people and adults possess the necessary digital skills and experience, they are more likely to lose access to devices or home internet, which may lead to digital exclusion. For instance, if their device breaks, they may not be able to afford to fix it, or they may prioritize other expenses over home broadband



## Digital and Social

Social connection and keeping up with family and friends were significant factors in enabling individuals to become digitally included, especially among older adults who were previously excluded. During the pandemic, older adults were encouraged by their loved ones to use devices and the internet to communicate while in lockdown or isolation.

Additionally, we found that in social contexts, such as knitting groups, users motivated each other to engage digitally to stay in touch outside of those settings, resulting in many older adults becoming digitally included..





# INSIGHTS

## Cost is the main contributor

Cost is the primary risk factor for individuals becoming digitally excluded. Although most younger people and adults have the necessary digital skills and experience, they are more likely to lose access to devices or home internet due to financial constraints. For instance, if their device breaks, they may not afford to replace or fix it, and they may prioritize other expenses over home broadband, such as heating.



## Value for money

Despite cost being one of the main risks of becoming digitally excluded, many users are unaware of services that could help them.

We discovered that many users did not know about services or offers such as free 6 months of home broadband from TalkTalk if they are claiming Universal Credit.





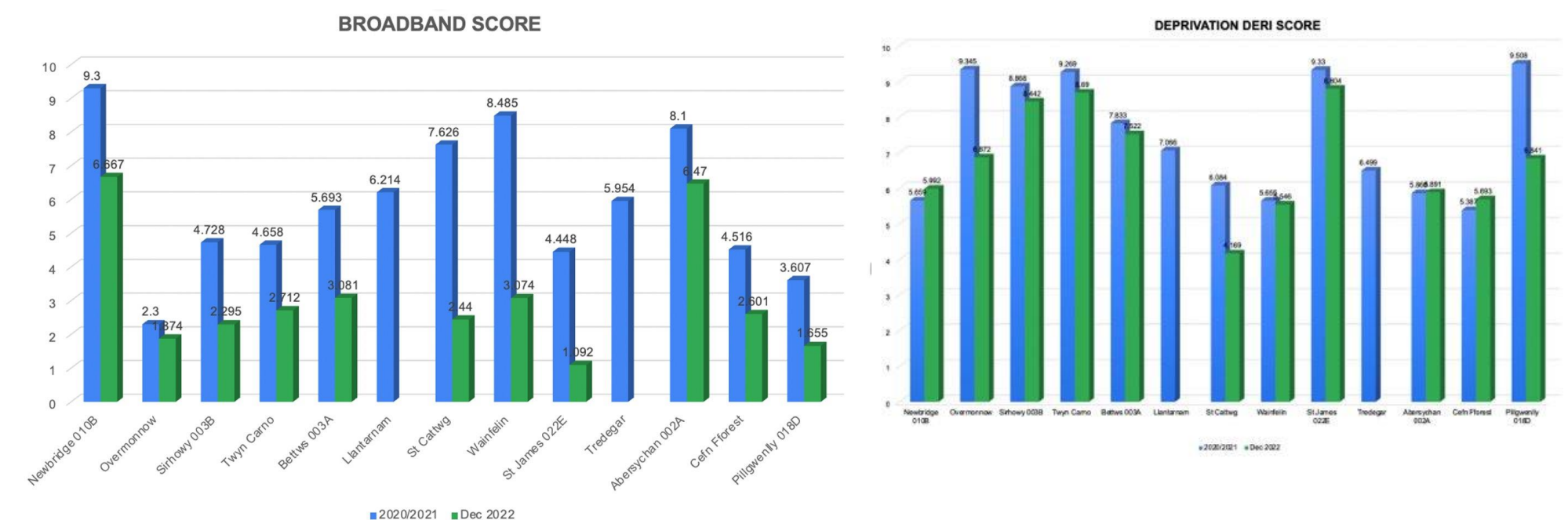
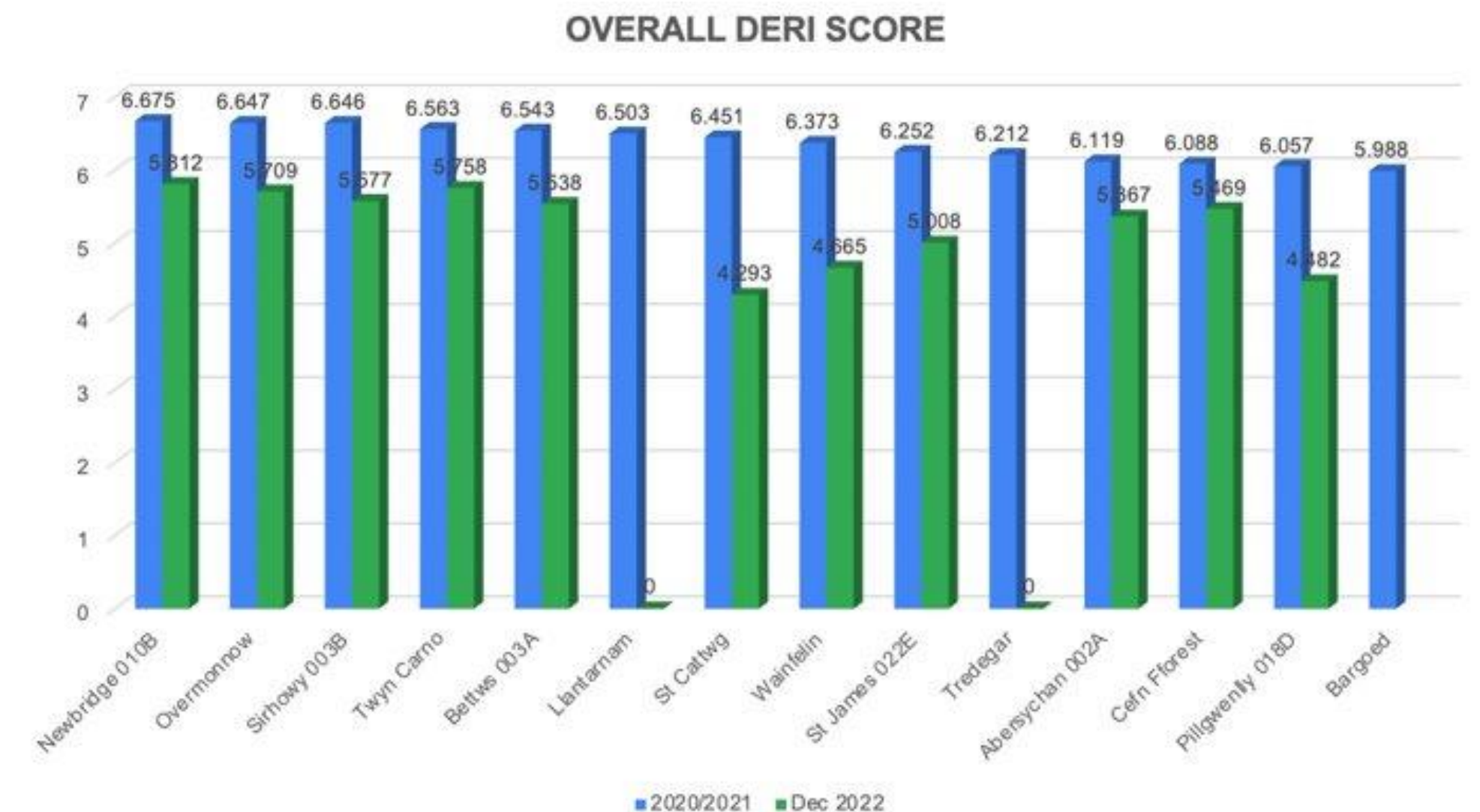
# MEASURE OF SUCCESS

## Summary

Earlier in the report, we explained how we had used a previous version of the DERI data to set a basepoint for the research. Here we can compare the original data set with the most recent version of the map server.

We can see that the Digital Exclusion risk score has decreased for the 12 areas initially chosen for further research.

From the new data, we can also see that the broadband situation has improved considerably for the 12 areas and a slight drop in the deprivation score for all but 4 of the areas.



Initial baseline data is taken from 2020/2021 version 1.5 map server. Current data is taken from the December 2022 version 1.6 map server.

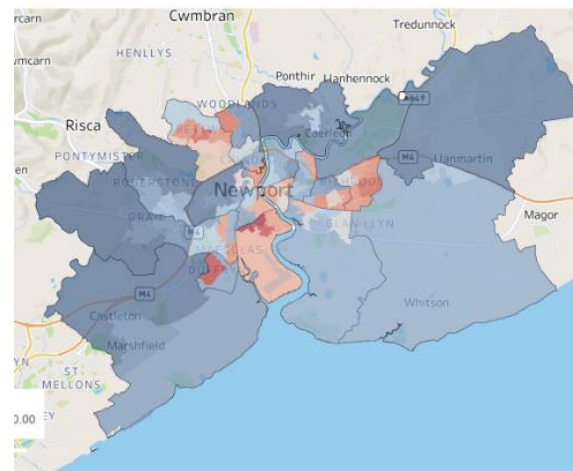


# MEASURE OF SUCCESS

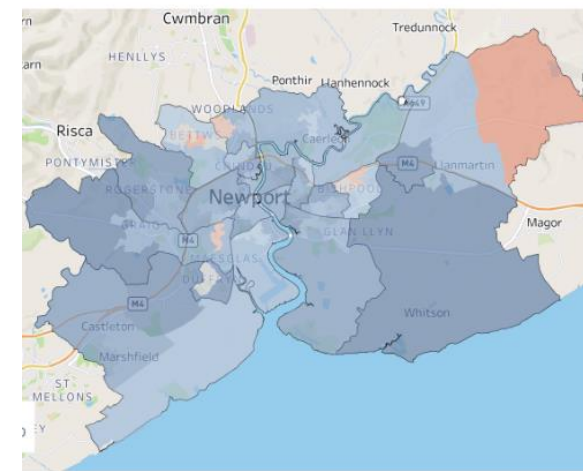
## Newport

Langstone exhibits a heightened risk of digital exclusion, with increased broadband scores suggesting possible connectivity issues, alongside a rise in deprivation, indicating a worsening of existing problem areas

2020/2021



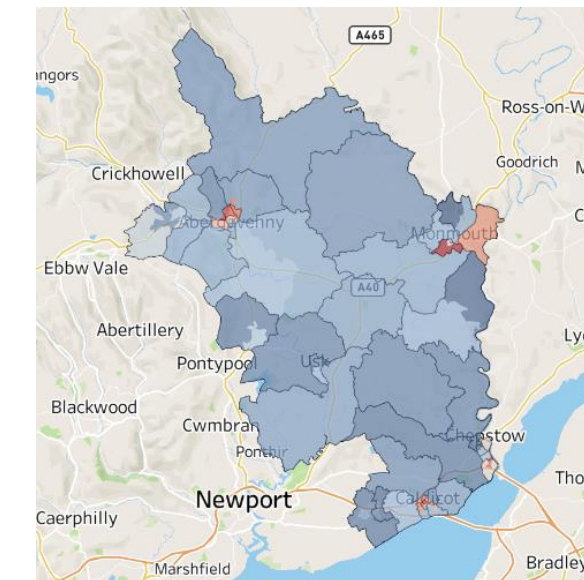
Dec 2022



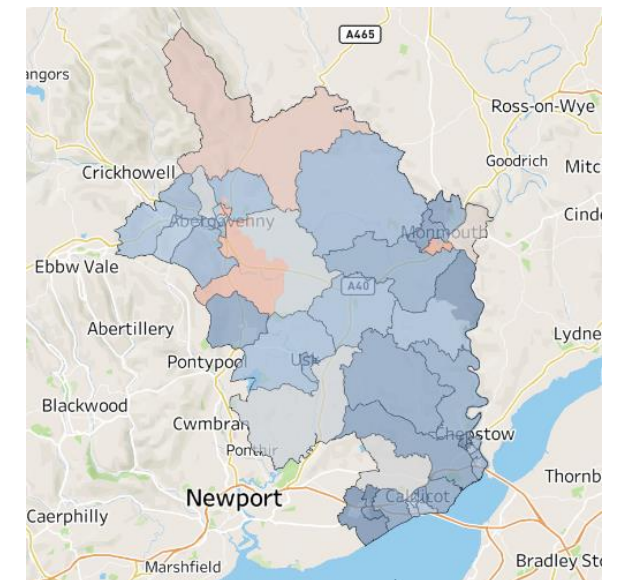
## Monmouthshire

Crucorney has a high digital exclusion risk with a significant broadband score increase and a slight rise in deprivation. Llanover shows a slight digital exclusion risk with a small broadband score increase and a slight deprivation decrease.

2020/2021

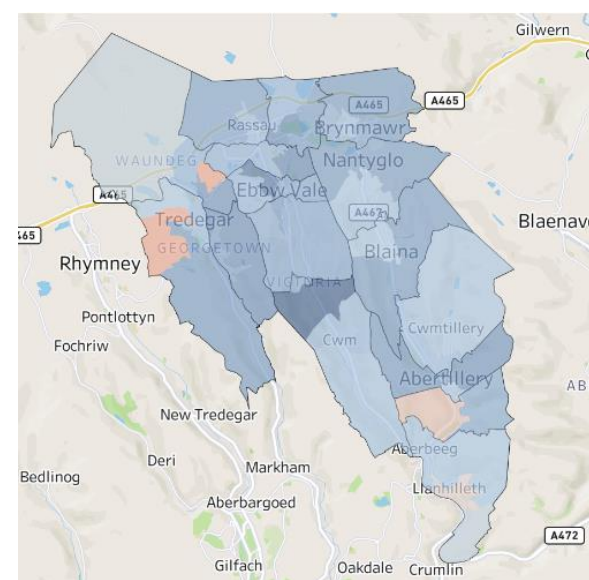
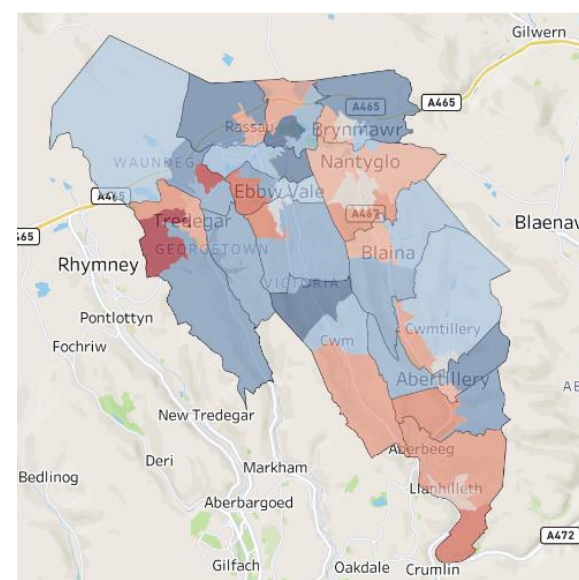


Dec 2022



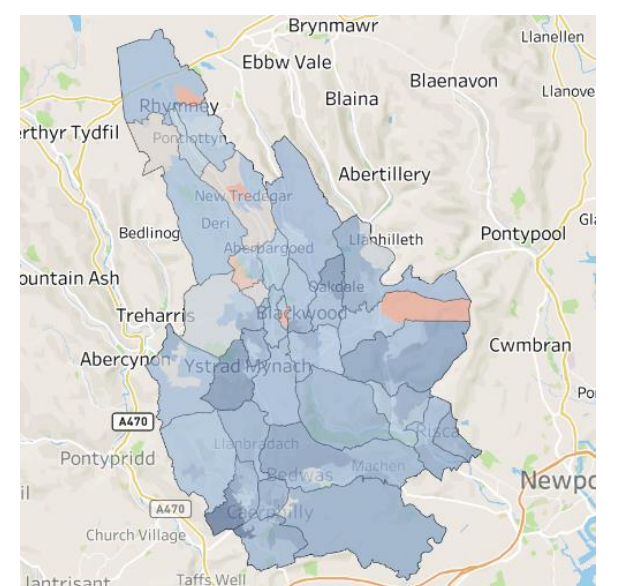
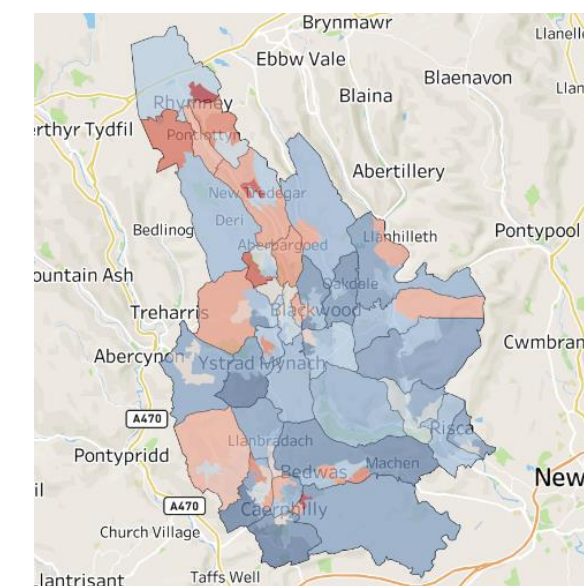
## Blaenau - Gwent

Overall improvement across area.



## Caerphilly

Overall improvement across area..





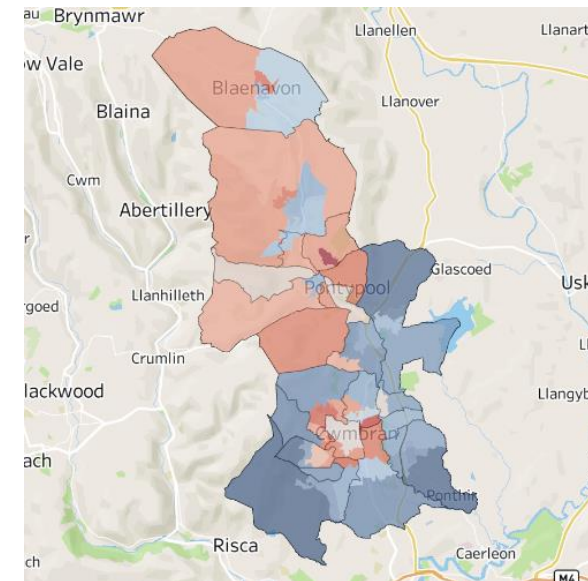
# MEASURE OF SUCCESS

## Torfaen

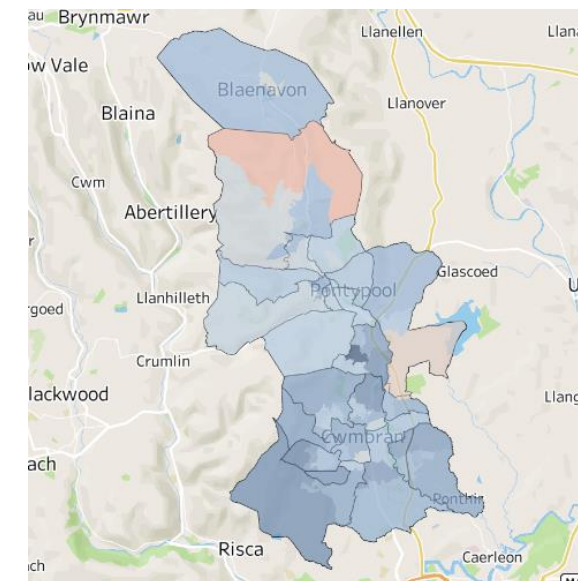
Based on the findings, it can be inferred that **New Inn** is experiencing a slight rise in the risk of digital exclusion, as evidenced by an increase in broadband scores, which may indicate potential connectivity issues.

The area is also witnessing a slight increase in deprivation, indicating a worsening of the existing problem areas. Despite these challenges, most areas in Torfaen have shown marked signs of improvement.

2020/2021



Dec 2022





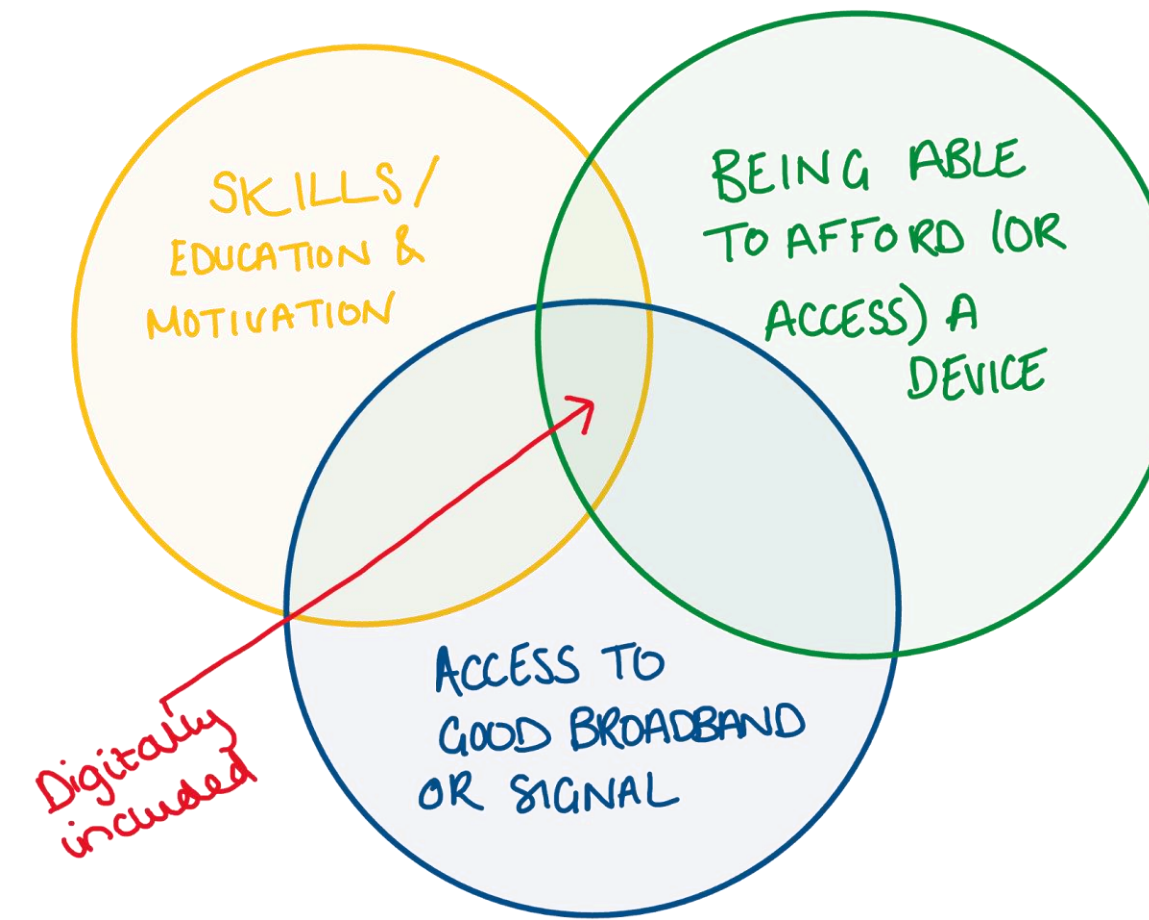
# REDEFINING DIGITAL EXCLUSION

## Users might have the skill but not the tools

To be classed as 'digitally included', you need to meet a set of criteria around your ability to search for information, stream content, communicate, and safely visit common websites.

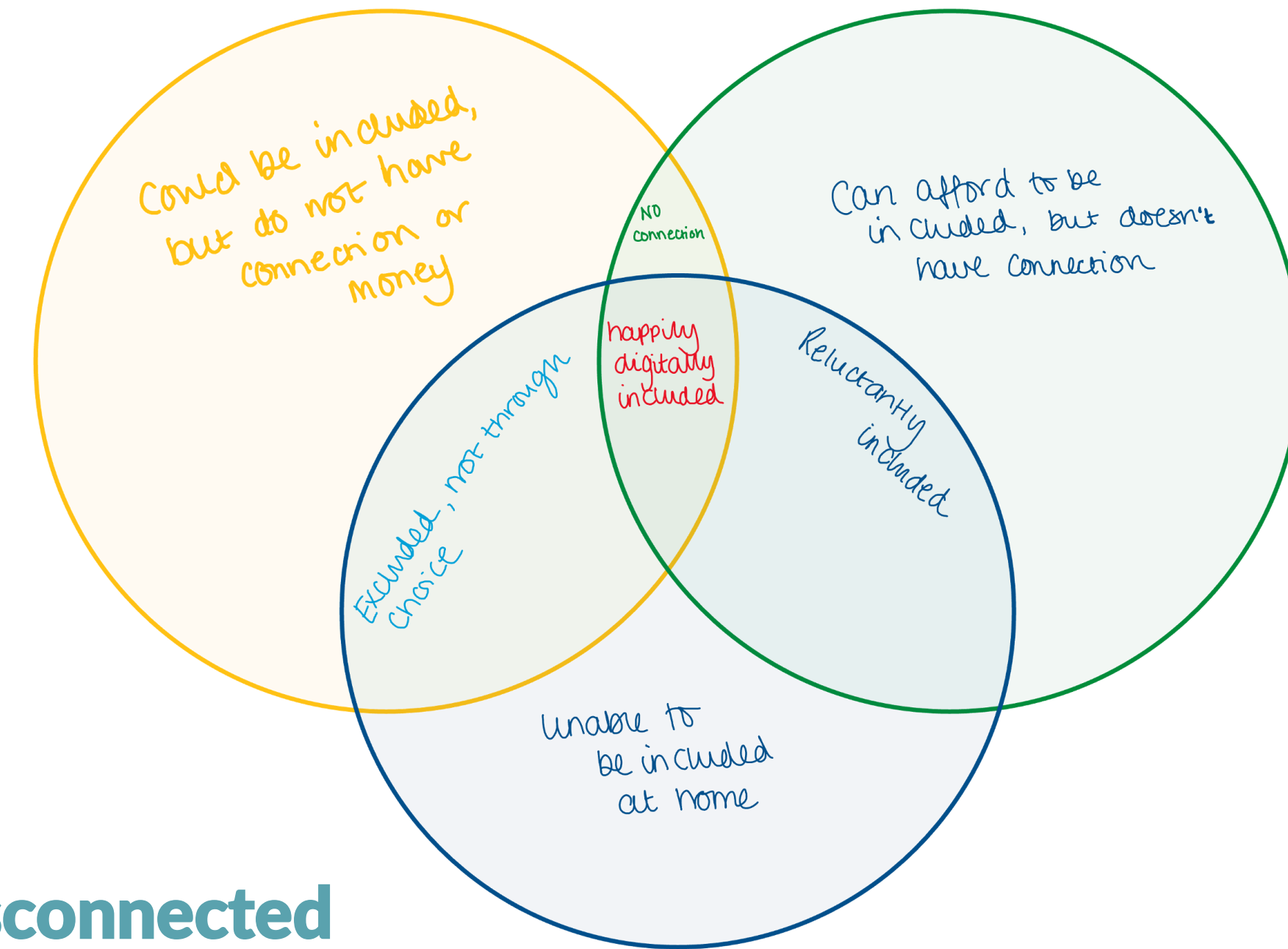
The term 'digitally excluded' has become a catch-all for anyone unable to access the Internet.

Digital exclusion should refer to those without the skills, desire or means to be digitally included.



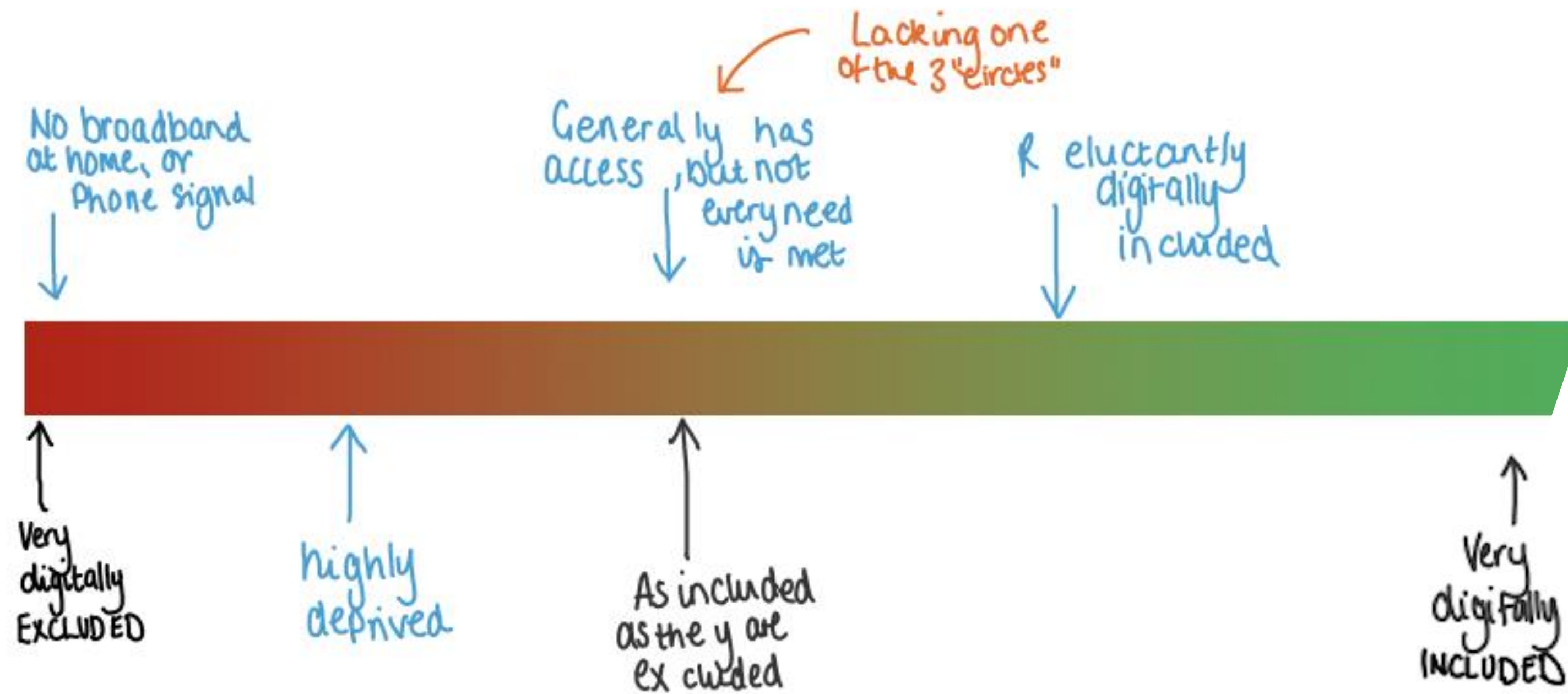
## Digitally disconnected

We propose adding a new category for those that become '**digitally disconnected**' through circumstance. These people would still meet the skills criteria for being classed as 'digitally included', but because of circumstances such as losing a job, and cost of living, they no longer have the means to afford to keep the device or access required to be able to use the internet.





# NOT A BINARY CHOICE



**WHAT IF DIGITAL EXCLUSION IS A SCALE, NOT BINARY?**



# RECOMMENDATIONS

## SUMMARY

The presentation provides a summary of recommended actions, but a more comprehensive list of recommendations has been collaboratively developed with stakeholders and service providers and can be found in Appendix 5. Moving forward with the action plan, Gwent partners need to convene and deliberate to determine the next steps. One effective initial step would be to schedule a meeting with the Digital Alliance Lead, to exchange information about other initiatives across Wales, which could help to reduce duplication and promote learning from each other's experiences. This collaborative approach will help to ensure the success and sustainability of initiatives throughout the Gwent region.





# ACTION PLAN

## Signpost to social tariff

As cost is a leading risk factor, and users are not aware of social tariffs that could help them with costs, signposting is essential.

These signposts could exist between citizens and the council in libraries and other contact points. They could also be highlighted at Jobcentres, places of worship and within the Universal Credit system.

Ask for more information at your local library, place of worship or jobcentre or visit

<https://www.ofcom.org.uk/phones-telecoms-and-internet/advice-for-consumers/costs-and-billing/social-tariffs>



## Collect data

Device loans are an excellent way to get devices out to people, but those who cannot afford to buy devices should be prioritised.

Instead of having a device loan system where anyone, regardless of their economic situation, can borrow a device from the library, priority should be given to those who cannot afford to buy their own; this way, those who are most at risk of becoming digitally excluded have provisions to prevent that from being the case.

## Run surveys

Run surveys to understand how successful measures have been.

We know there are some brilliant services in place across Gwent, but one way to understand how successful these measures have been, we need to understand if usage has changed.

A partnership across Gwent in digital should run surveys to understand what the baseline currently is, and then assess this at intervals to understand what needs to be done further.



# ACTION PLAN

## Continue encouraging digital skills

We've seen that digital skills and literacy lessons hugely improve the level of digital confidence and ability within the community.

Continuing to advertise and encourage these sessions with members of the public is a great way to ensure that skills continue to develop within the community and that groups within the community, most notably those who are out of work, are upskilling digitally.



## Collaborate with banks

One of the main reasons people did not want to engage digitally was fear.

Through our surveys, we found that citizens were scared to engage with the online world because they were worried about online security.

Collaborating with local branches could be a way around this, making sure that there is occasionally someone available to help set up citizens with online banking safely and securely to allow citizens to become digitally enabled with confidence. .

## Drop in sessions

Lean on community members to run drop-in sessions in communities across Gwent.

When we spoke to stakeholders, we discovered that these kinds of measures had been helpful in the past.

Not everyone who needs help can make the time to attend digital capability lessons; citizens may find it helpful to have individuals docked in libraries at certain times that can help them. This could be any member of the community or council.

In Blaenau Gwent, a member of the housing association is placed in a library once a week to assist with applications.



# Appendix

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## List of key appendices

1. Digital Exclusion Project Action Plan
2. Digital skills survey PDF
3. Digital skills survey results (PPT)
4. Customer contact survey PDF
5. Customer contact survey results (PPT)
6. Miro Boards – PDF downloads
7. One note – PDF downloads
8. Device loan survey (insight)
9. Device loan return survey (evaluate success)
10. List of initiatives
11. Lesson Learnt
12. Risk register



# Reading

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## Documents and reports

1. ONS Data <https://www.ons.gov.uk/>
2. National Wales data
3. Caerphilly Report <https://www.caerphilly.gov.uk/caerphillydocs/news/addressingdigitalexclusion>
4. Audit Wales
5. DERI Index [https://www.gmtableau.nhs.uk/t/GMCA/views/DigitalExclusionRiskIndexv1\\_6/DERIScoredashboard](https://www.gmtableau.nhs.uk/t/GMCA/views/DigitalExclusionRiskIndexv1_6/DERIScoredashboard)
6. Caerphilly Customer and Digital Strategy
7. Digital inclusion in Wales <https://www.digitalcommunities.gov.wales/digital-inclusion-in-wales-2/>
8. Digital Inclusion Alliance for Wales <https://www.digitalcommunities.gov.wales/wp-content/uploads/2021/04/DIAW-Inclusion-to-Resilience-0221-1.pdf>
9. Good Things Foundation – The digital divide <https://www.goodthingsfoundation.org/the-digital-divide/>



