

Primary Research in Digital Exclusion 2022 Dumfries and Galloway



Where are we now and what next?
22 June 2022

Welcome

- Key stakeholders from public sector
- Members of the project reference group
- Project team



Dumfries and Galloway Primary Research in Digital Exclusion 2022

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- Context and 2020 desk research
- Project timeline, milestones and statistics
- Methodology and analysis
- Headlines
- Breakout session
- Questions for further consideration
- Launch of final report



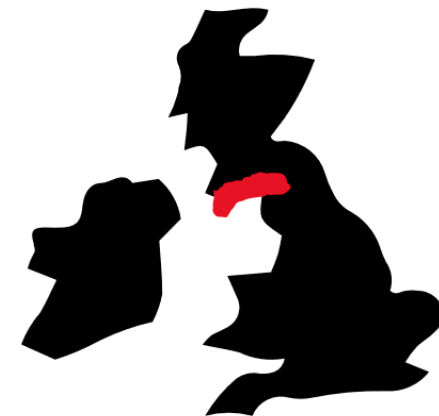
Purposes of Session

- To stimulate engagement and buy-in to this research
- To create the opportunity for key policy makers to start thinking about the implications of this research
- To start thinking about the possibilities of joint working with other organisations



Digital Exclusion in Covid

- During Covid TSDG was invited to lead on several digital exclusion projects.
- As a result we identified key gaps in strategic understanding and commissioned further research into digital exclusion in Dumfries and Galloway.



Digital Exclusion Desk Research Report – October 2020



THIRD SECTOR
Dumfries and Galloway

Digital Inclusion in Dumfries and Galloway



Stuart Harrison
Oct 2020

- In October 2020 TSDG commissioned a piece of digital exclusion desk research to be undertaken.
- Purpose of this research was to investigate the extent of digital exclusion D&G.
- This research used national/Scottish evidence and then applied a population ratio to estimate data for D&G.



Third Sector
Dumfries and Galloway

Digital Exclusion Desk Research Report

December 2020-key findings

- Up to 30% of the population in D&G could be digitally excluded by lack of access, skills, or motivation.
- Those most likely to be digitally excluded were also likely to be disadvantaged in other ways such as age, disability, or poverty.
- **No primary research** about digital exclusion for D&G; the data in the 2020 report required to be tested in a primary context.
- No one agency was identified as the 'lead agency' for digital exclusion in D&G.
- No overall strategic approach to digital exclusion in D&G.



Definition of Digital Exclusion

Digital exclusion is lack of:

- **Access** (to kit, broadband, the means to pay for them, or design limits access)
- **Motivation**
- **Skills**



Digital Exclusion Primary Research Project

– Schedule Oct 21 to Mar 22

Established Project reference Group (PRG)
Appointed project team
PRG Terms of Reference agreed
Connections made with IRISS

Completed interviewers' pack
Training conducted for pilots
Project pilots completed
Mass expression of interest email sent

Conducted training for 41 TSOs
Interviewers' packs sent out
Held three PRG meetings Jan-Mar
Received 898 questionnaires

By start
Oct
2021

By start
Nov
2021

By end
Nov
2021

By end
Dec
2021

By end
Mar
2022

By end
April
2022

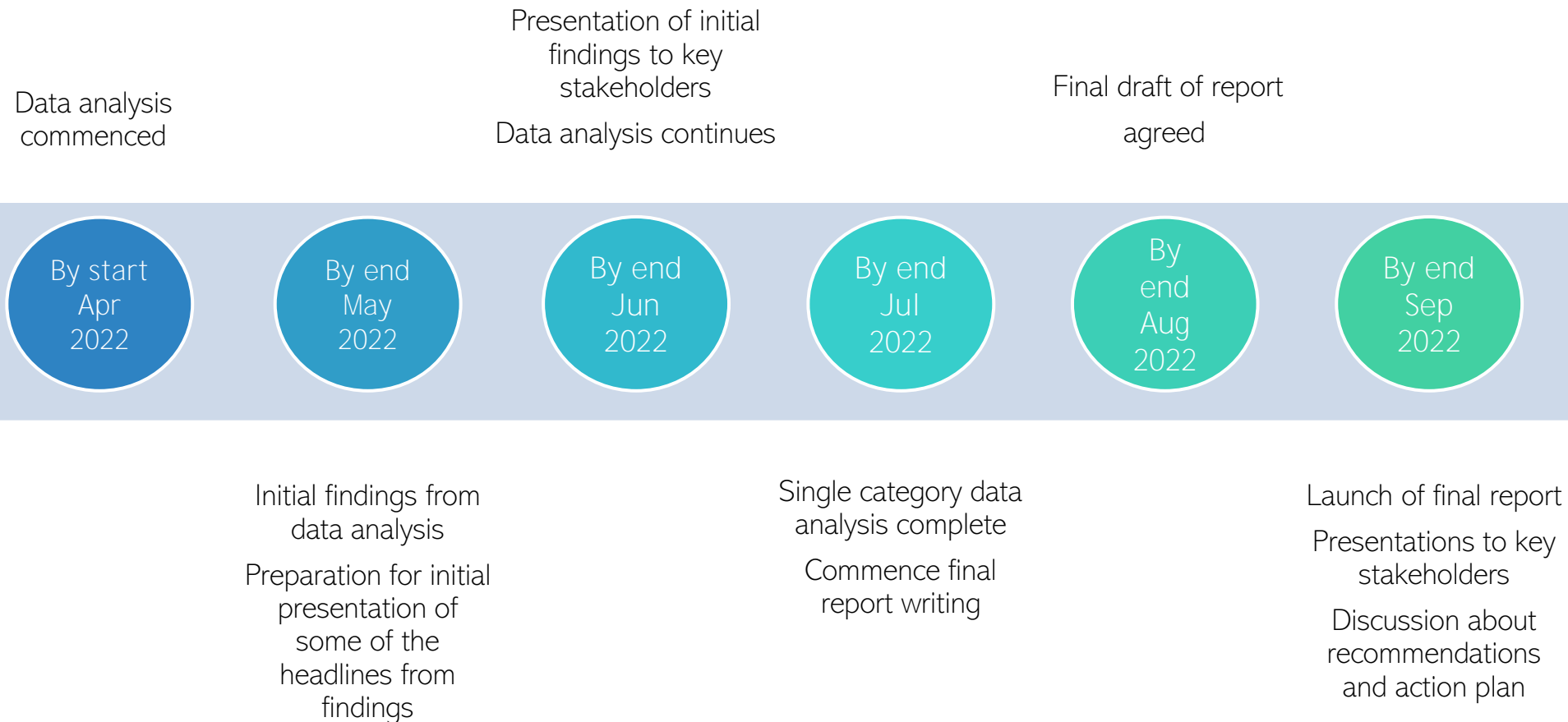
Finalised project questionnaire on Microsoft Forms
Questionnaire tested by TSDG staff

Two information webinars held
Amended questionnaire based on pilot feedback
68 expressions of interest
Recruited 41 TSOs

Closed survey
Appointed project manager for analysis phase
Planned analysis phase

Digital Exclusion Primary Research Project

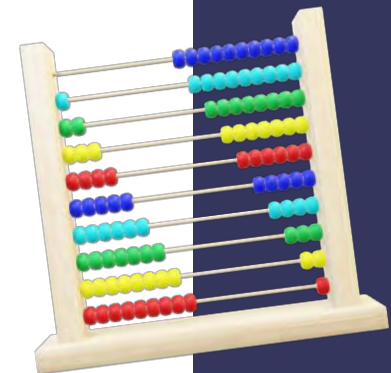
Schedule April 2022 to Sept 2022



Statistics and Numbers- phase one



No. of initial expressions of interest	68
No. of Organisations that attended training	41
No. of Organisations that returned signed research agreement	38
No. of organisations that completed data gathering	38
Final number of questionnaire responses	898

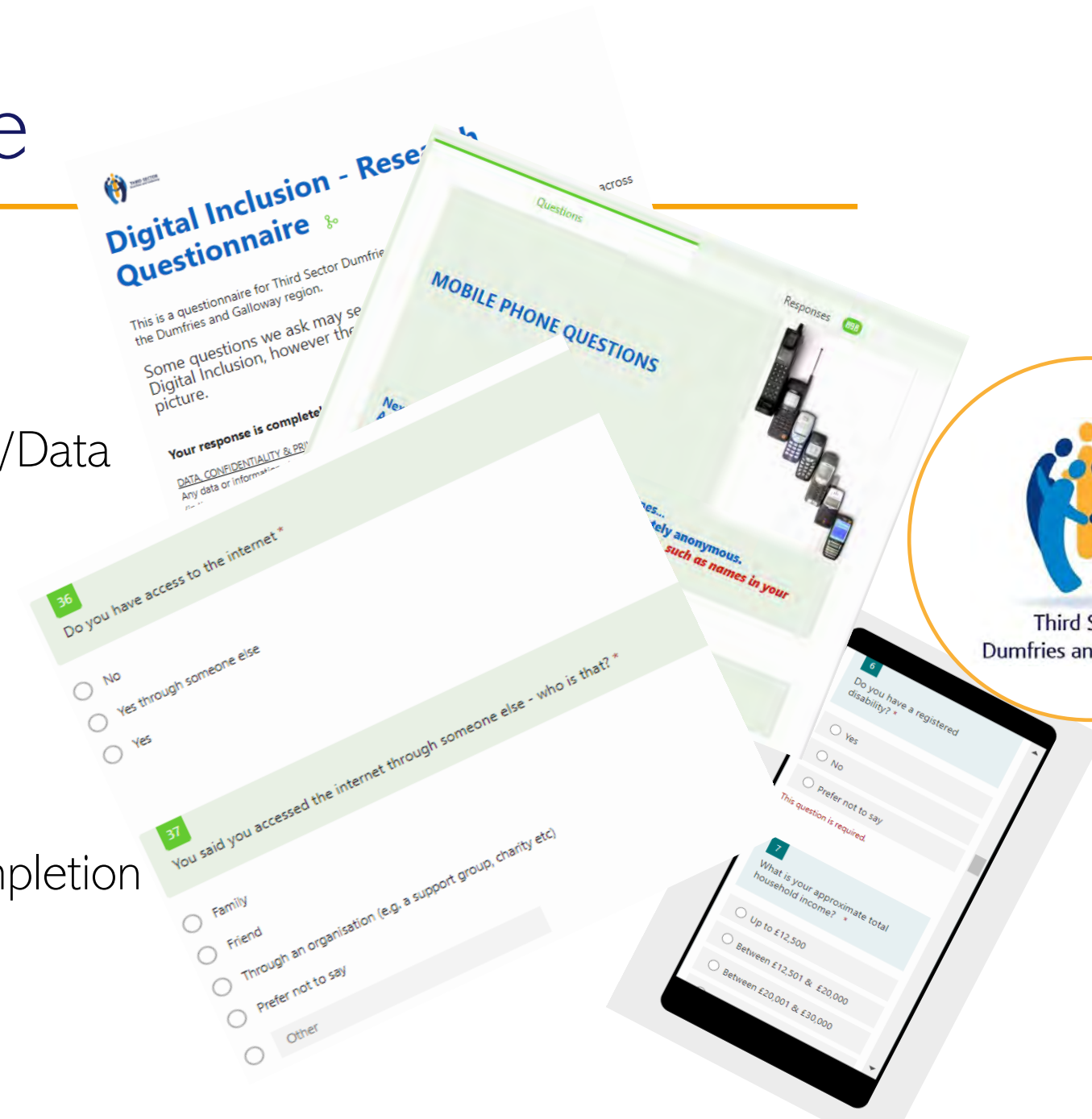


Questionnaire

58 questions maximum

1. Survey demographics/Data protection
2. Mobile phone
3. Internet (& devices)
4. E-mail

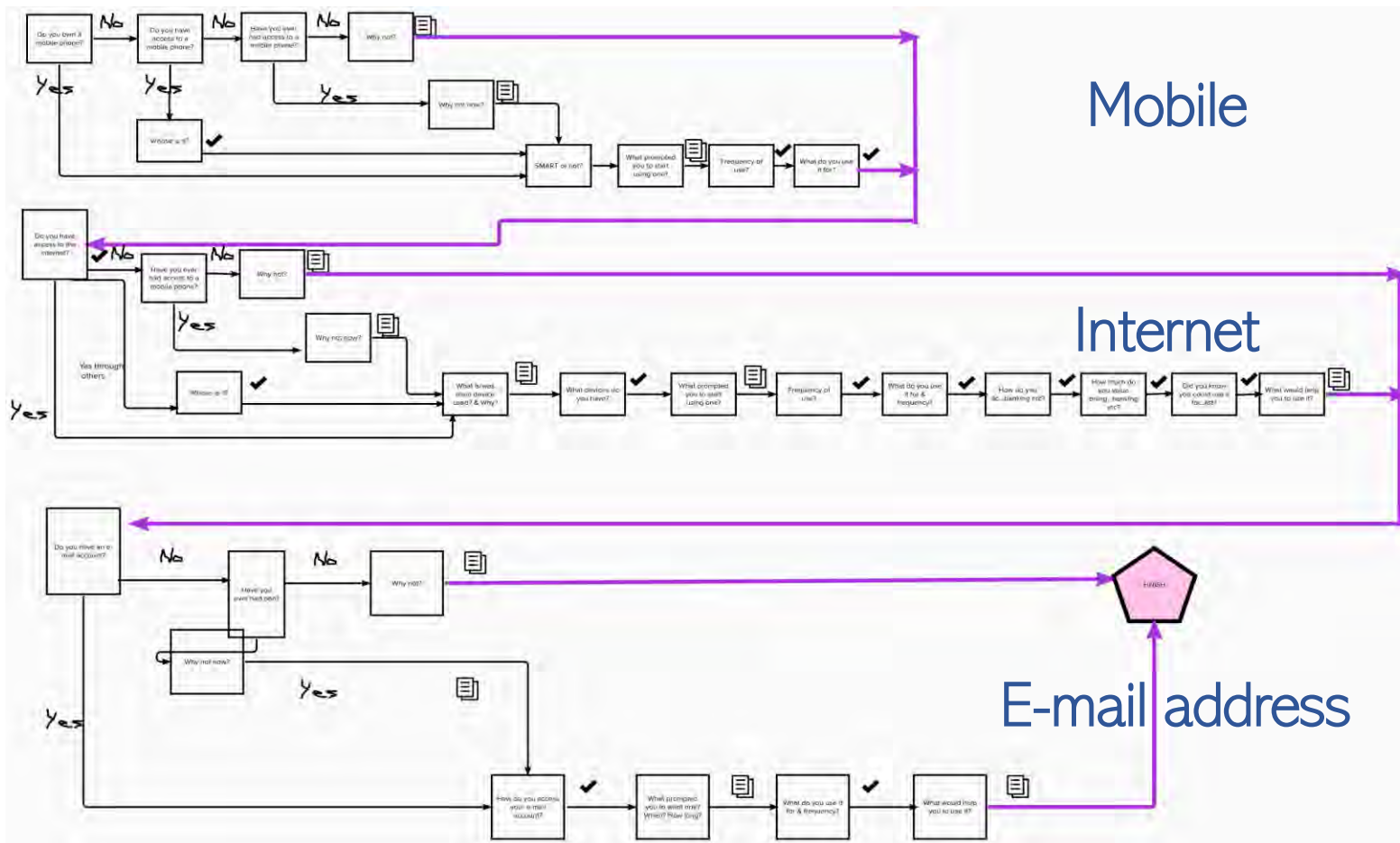
24 minutes average completion time



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Questionnaire Flow Diagram

Demographics/GDPR/Exclusions



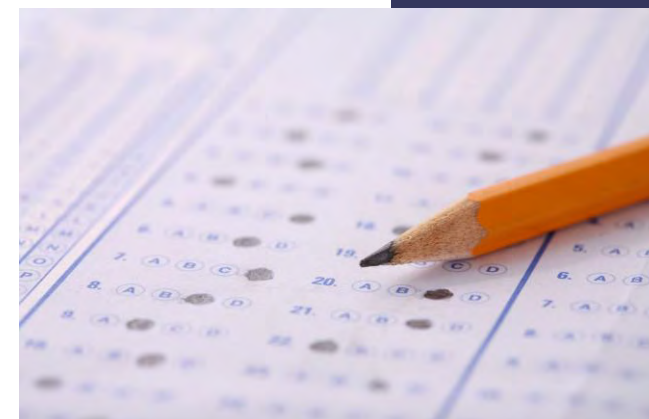
Analysis so far and planned

Completed	Scheduled	Beyond Scope
<ul style="list-style-type: none">• Age• Income• Disability• Caring for others• Those with no mobile/no internet access• LGBTQ+• Language barriers• Literacy barriers	<ul style="list-style-type: none">• Household data• Benefits• Ethnicity• Sex• Specific analysis for each Third Sector Organisation	<ul style="list-style-type: none">• Postcode• Religion• Relationship Status• Accommodation Type



Survey demographics

- **898** Responses from third and public sector service users
- Generated **145,632** individual response items of raw data
- Across all age ranges from 16-80+
- Across all income groups under £12.5K to over £40K
- Standard demographic definitions taken from national protocols



Survey demographics

Excel spreadsheet

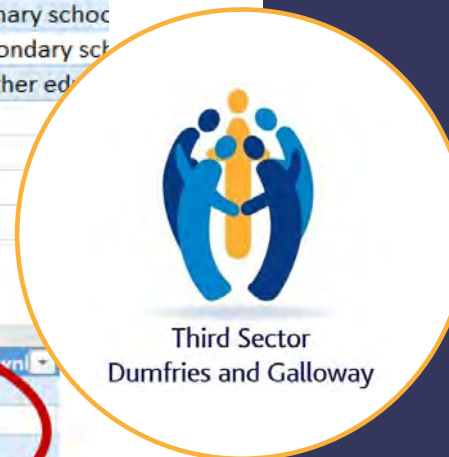
Mining the data further

“4 dimensional” thinking

G	H
What age range are you in?	What sex are you?
18-24	Female
80+	Female
40-54	Prefer not to say
40-54	Female

I	U	V	W
What is your approximate annual household income?	What is your working status?	Which if any of the following services do you use?	What is your highest level of education?
Between £20,001 & £30,000	Work full-time (30 hours or more)	None	University
Up to £12,500	Retired;	Cold Weather Payments	Primary school
Up to £12,500	Looking for work;	Universal Credit; Jobseeker's Allowance	Secondary school
Between £12,501 & £20,000	Work part-time (less than 30 hours)	Carers Allowance; Disability Living Allowance	Further education

BX	BY	BZ	CA
How often do you use the following services?	Make or receive phone calls	Listen to or download music	Watch online videos
Monthly	Daily	Monthly	Weekly
Never	Never	Never	Never
Weekly	Weekly	Monthly	Monthly



How many 55-64 year old low income men have access to a mobile phone and what do they use it for?

Headlines so far

- This is the first time we have Dumfries and Galloway specific data for digital exclusion
- The 2020 key findings have been tested against this new data
- Covid has changed the nature of the challenge— digital exclusion still exists but not in the shape and places we might have thought
- We anticipate surprises and complexity



Headlines so far...Access

- Access to the internet is no longer the main issue
- Only 2% have no access to the internet
- It is now about:
 - cost, connectivity and speed
 - frequency of access,
 - age/quality of device used to access,
 - income affects the type of device and functionality
 - availability of a device within the household due to sharing.



Headlines so far...Skills

- **Skills** - not perceived by the respondents to be an issue
- Only 1.1% (9 people) requested additional skills...
- ... remember this is a self-perception
- However, low use of the internet for more sophisticated purposes - website management, vlogs, blogs, political engagement, IT and security issues



Headlines so far...Motivation

- **Motivation** to use the internet remains a significant issue
- Nearly a third of people across all groups prefer **not** to use online transactions and highly value other approaches:
 - 14% of all transactions are conducted face to face
 - 9% engage family/friends to do things
 - 7% use landline or post
- 19% of all ages have know-how but no desire to use internet for transactions
- More than 12% of the over 80's claim to know how to use the internet but prefer not to



Headlines so far...a few more

- **Household income:** The poorer the household, the more digitally restricted
- More children in a household mean fewer devices per household
- **Disability:** Internet access and usage much higher than previously thought **but** technological accessibility (poor design) is still a significant barrier
- **Literacy:** Nearly 8% see literacy as a barrier in conducting transactions regardless of whether technology is involved
- No motivation to use the internet amongst those with language and literacy barriers



Summary

- The analysis to date is focused on individual demographic categories
- Findings to date are more nuanced, precise and useful to the region compared to previous studies.
- Final report will contain a significant and valuable series of findings.
- There is significant potential to interrogate the data with more complex scenarios
- Future analysis requires guidance as well as time and money.



Digital Inclusion Desk Research Report

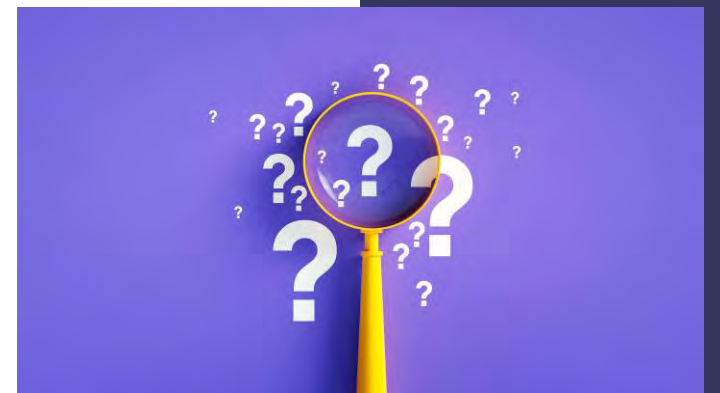
December 2020-key findings

- ✓ Up to 30% of the population in D&G are digitally excluded by lack of access, skills, or motivation.
- ✓ Those most likely to be digitally excluded were also likely to be disadvantaged in other ways such as age, disability, or poverty.
- ✓ **No primary research** about digital exclusion for D&G; the data in the 2020 report required to be tested in a primary context.
- ✗ No one agency is identified as the 'lead agency' for digital exclusion in D&G.
- ✗ There is no overall strategic approach to digital exclusion in D&G.



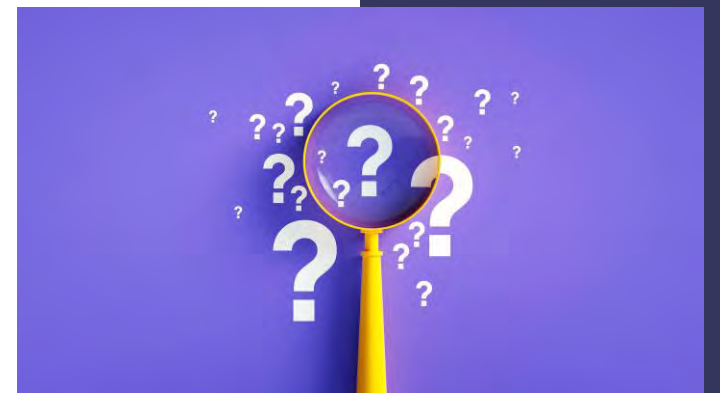
Questions?

1. What value would there be in creating a single strategic approach to this?
2. What are the benefits of creating a single voice on digital inclusion for our region?



Questions for further consideration

1. What **strategies** do you have that might be informed or revised by this research?
 - o Consider strategies directly related to digital inclusion such as digital skills and infrastructure
 - o Consider strategies indirectly related such as employability, children's services, fair work
2. What current **services** do you run that could be informed or shaped by this research?
 - o Consider which service users might be digitally excluded by limited access, skills or motivation



Questions for further consideration



3. What **services** are you planning which could be informed or shaped by this research?
 - o Consider which service users or potential users might be digitally excluded by limited access, skills or motivation
 - o Which people or groups of people (staff, elected members, volunteers, trustees) in your organisation would benefit from the outputs of this research and should influence decisions about how it is used in your organisation?

4. Which partners should we engage with?



Final Report Launch



- 2pm 28th Sept
- Venue tbc

