

Understanding digital exclusion in the West of England

A report to inform the West of England Mayoral Combined Authority's digital inclusion programme

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Good Things
Foundation



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This research was commissioned by the West of England Mayoral Combined Authority as part of their programme on Digital Inclusion. The analysis and views are those of the authors and do not necessarily represent those of the commissioning body.

Summary

Good Things Foundation, Cosmic, Better Places, and University of Liverpool used a combination of research and stakeholder engagement to produce a snapshot of issues, provision, and opportunities to improve digital inclusion in the West of England.

Why digital inclusion matters

Digital inclusion means being able to access the internet and engage online – **safely and confidently - when you need and want to.**

With opportunities and services increasingly online, digital inclusion is a basic need. At a minimum, it requires a combination of access to a device and data connectivity, basic digital skills (also **confidence, motivation, trust**), and access to support when needed.

Awareness is rising about the damaging impacts of digital exclusion for economic growth, and for people's access to opportunities, services, and social and economic participation.

What the data tells us

- The West of England compares well against many parts of the country. According to the 2024 UK Consumer Digital Index, the South West has the highest number of people able to complete all 8 Foundation Level tasks for everyday life. However, there **is still a significant digital exclusion challenge** for the region.
- Bespoke analysis of Ofcom data on population internet usage estimates that over 14% of adults in the region are non-users or very limited users of the internet. This equates to over 100,000 residents.
- The total population across non-users, very limited users, and limited users

who don't use social media is around 204,000 adults. This contrasts starkly with the population of 227,000 adults who are extensive internet users. This paints a picture of "Two Gorges" – Silicon Gorge and a digital divide.

- Regional analysis of national data using a holistic benchmark, the Minimum Digital Living Standard for Households with Children, estimates 39–41% of households with children in the region fall below this. These families lack some or all of the devices and connectivity, practical skills, or critical thinking skills needed to engage safely and effectively online today.
- Digital exclusion is deeply intertwined with other forms of disadvantage, including poverty, unemployment, lack of education, life-impacting conditions, and living in areas of deprivation. There is also a clear link between older age and being **offline. Given the region's geographic and demographic make-up, this means there will be digitally excluded households in more affluent areas (like Bath), as well as in areas of greater deprivation (like South Bristol).**

What we heard about challenges facing residents and businesses

- **Affordability: Poverty is a significant barrier** to digital inclusion, with individuals often choosing between basic needs (such as food, medicine, **heating**) and digital access. Concerns were raised about a 'poverty premium', where people pay more for mobile or broadband services they cannot afford; and the costs of buying or replacing devices which get broken or out-of-date.

- **Awareness of digital inclusion support:** Several residents have had support from libraries and local charities to get online. Some said it **is hard to find out what is available.** People wanted provision to be better publicised, and better coordinated **efforts to help people find the support they need.**
- **Access to digital inclusion support: Specific challenges for people in rural areas and less well-connected urban areas were raised, as well as the lack of support for particular groups (e.g. older people who seek digital support for social inclusion rather than for employment; people seeking asylum).**
- **Accessibility and design:** Frustrations about poorly designed online services were high. These present extra barriers for people with accessibility, language, or literacy needs. Several residents described experiences of navigating online systems (e.g. health, welfare, **job seeking**) as **time-consuming and frustrating.**
- **Concerns about digitalisation:** Concerns ranged from the challenges, and costs, of keeping pace with digital hardware and software; to keeping up with future workforce skills, and fears about the negative impacts of **artificial intelligence (AI) on economic opportunities;** to concerns about social media, risks of online abuse, time-wasting, and temptation to overspend.
- **Businesses face challenges too:** Analysis of digital skills audits across a **number of sectors identified common challenges: low digital confidence in some roles and sectors (e.g. charities, social care); underuse of productivity features; challenges related to digital connectivity and remote access; a need for role-specific training; and a lack of digital strategy awareness.**

A snapshot of digital inclusion provision in the West of England

Nearly 200 providers of digital inclusion support (including libraries, community **organisations, contracted providers**) were **identified. Type, level, and availability** of support varies widely (e.g. help with devices and/or connectivity; with digital skills and online safety; with using online **services or the NHS App**).

Mapping provision against the Digital Exclusion Risk Index¹ and Minimum Digital Living Standard for Households with Children², we found broad alignment between the location of provision and areas with the highest likelihood of need, although there are some gaps that would **benefit from further exploration led by** those who know the localities best.

Over 60 organisations are already in the National Digital Inclusion Network; around half use the National Databank to access free mobile data for people who cannot afford this. Some use Learn My Way (free **basic digital skills learning tool**), or have had devices from the National Device Bank, or attended training sessions.

There is scope to grow the use of these, and other, free resources to tackle digital exclusion in communities; and to raise awareness of support such as discounted 'social tariffs' for broadband and mobile.

Some digital inclusion support is embedded in wider programmes (e.g. help with cost of living, employability, **small business support**), and often directed towards more deprived areas and marginalised communities. There are several positive examples of good practice, innovation, and partnership working, such as the Bath Digital Divide Collective.

Digital inclusion providers face challenges, including:

- **Funding:** Short-term funding and lack of coordination between funding streams were highlighted, alongside particular challenges for small organisations without capacity to manage large grants, despite their deep community connections.
- **Digital capabilities in the voluntary, community, faith and social enterprise (VCFSE) sector:** Limited digital capabilities and capacity in voluntary, community, faith, and social enterprise organisations are preventing these organisations from providing better support to digitally excluded people – even though these are the organisations which have the reach and relationships.
- **Intermediate digital skills:** Some **flagged a gap in support for people** who are seeking careers beyond entry-level but do not yet have higher digital skills. In some areas, such as South Bristol, people felt there is little provision beyond entry-level.

Opportunities for the West of England Mayoral Combined Authority

Digital inclusion is now a priority for the UK Government, held by the Department for Science, Innovation and Technology, and across several combined and local authorities.

Hallmarks of effective digital inclusion approaches include: taking a holistic, cross-sector, collaborative approach; embedding digital inclusion as a cross-cutting theme in wider strategies **and programmes (eg. skills, health);** recognising the need for community support; and seeing digital inclusion as ‘everyone’s business’ – a whole-of-society issue.

Across the region, many stakeholders are positive about the combined authority’s

engagement with the digital inclusion agenda to date. Five areas emerged with scope for adding value and impact: Leadership, Funding, Partnership, Evidence, and Ecosystem. Recognising the constrained funding environment, and the interrelated nature of potential **opportunities, stakeholders identified the** following as potential priorities:

- Establish a West of England digital inclusion network or taskforce, open to a wide range of stakeholders, to foster collaboration
- Explore ways to use existing regional and local funding to deliver more digital inclusion support in communities
- Co-produce regional digital inclusion goals and priorities
- Leverage the potential contribution of regional ‘anchor institutions’ – such as NHS Foundation Trusts, universities, local businesses
- Raise awareness of nationally available resources which could be **used to benefit more people in the** region
- Raise awareness of digital exclusion and inclusion to secure buy-in from local and regional stakeholders.

In summary

Commissioned by the West of England Mayoral Combined Authority, building out of the West of England Digital Plan³, this discovery project has revealed a strong appetite among a wide range of stakeholders to work together, with leadership from the Combined Authority, to tackle the digital divide. The region’s creative and tech industry strengths risk masking the realities of the digital divide, so there is work to be done in bringing others on board; but there is also already a solid foundation of existing provision, and some positive examples of good practice and partnership working.

1. Background, aims and approach

Digital inclusion means being able to access the internet and engage online – **safely and confidently - when you need** and want to.

With opportunities and services increasingly online, digital inclusion is a basic need. This requires access **to a suitable device, sufficient data** connectivity, basic digital skills – also **confidence, motivation, trust - and** access to support when needed.

The Minimum Digital Living Standard **definition (which has been developed with and defined by members of the public) reflects that all are needed in** combination: **“A minimum digital living standard includes accessible internet, adequate equipment, and the skills and knowledge people need. It is about being able to communicate, connect, and engage with opportunities safely and with confidence.”**

Across the country, awareness is rising among policy makers, service providers, businesses and in communities about the importance of digital inclusion – a necessity rather than a ‘nice to have’ – and about the damaging impacts that digital exclusion has on people’s access to opportunities, essential information and services, and their social and economic participation.

This report provides a snapshot of the key issues surrounding digital exclusion in the **West of England, drawing on the findings** of a rapid review commissioned by the West of England Mayoral Combined Authority to inform the development of its digital inclusion programme. Working collaboratively with the Combined Authority’s digital transformation team, the project was led by Good Things Foundation, the UK’s leading digital inclusion charity, in partnership with Cosmic, Better Places, and the University of Liverpool.

The West of England Mayoral Combined Authority (covering Bristol, Bath and North East Somerset and South Gloucestershire **councils) and North Somerset Council** jointly published a West of England Digital Plan in Autumn 2023, setting out their shared digital ambitions for the wider region. The report highlights that people who are digitally excluded are ‘more likely to experience poor outcomes that affect quality of life’ and sets out key commitments including:

- To reduce digital exclusion, focussing on those most affected.
- To improve digital skills at all levels so that:
 - Residents have the foundation skills they need to get online.
 - Residents have the digital skills for life.
 - Residents have the digital skills needed for work.
 - Residents and businesses can **benefit from advanced digital** skills.

Within this context, the report explores which places, populations, and businesses are most affected by digital exclusion in the West of England Mayoral Combined Authority region, what services currently exist and how are they funded, as well as the main pathways to impact and priorities for action.

The findings offer an evidence-based springboard which can be used to inform subsequent phases of the Combined Authority’s work, including continued stakeholder engagement and the development of a new regional digital inclusion action plan.

¹ Greater Manchester Combined Authority, [Digital Exclusion Risk Index](#)

² [Yates, S et al \(2024\), Minimum Digital Living Standard for Households with Children](#)

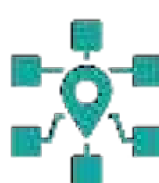
³ [West of England Combined Authority \(2023\), West of England Digital Plan](#)

1.1. Approach

The approach included the following activities, conducted over a ten-week period between September and December 2024:



Desk-based research and analysis of key national datasets, including Ofcom data; the Lloyds UK Consumer Digital Index; the Digital Exclusion Risk Index; and the Minimum Digital Living Standard for Households with Children.



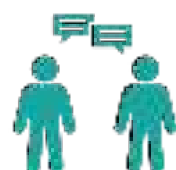
Mapping of digital inclusion providers across the West of England, **including voluntary, community, faith and social enterprise (VCFSE)** organisations, education and skills providers, local government services and businesses, including over sixty organisations that are already members of the National Digital Inclusion Network supported by Good Things Foundation.



Analysis of business skills audits conducted by Cosmic, exploring the digital skills of staff and volunteers in businesses across the region.



A series of online workshops and interviews engaging over 50 local and regional stakeholders from across sectors and geographies in the West of England.



Three face-to-face sessions involving West of England residents with **lived experience of digital exclusion (one in each local authority area)**.

⁴ Yates, S et al (2024), [Minimum Digital Living Standard for Households with Children](#)

⁵ Developing a Minimum Digital Living Standard for Households is a collaboration led by the University of Liverpool. A key pillar is engaging with members of the public through a structured process to arrive at consensus on what households need to feel digitally included. For more information: www.mdls.org.uk

⁶ West of England Combined Authority (2023), [West of England Digital Plan](#)

2. National Context

National data reveals a digital divide, impacting millions of children and adults across the UK. The data is brought to life in Good Things Foundation's Digital Nation 2024.⁷ At the UK level, data from Ofcom, the Lloyds UK Consumer Digital Index, the Nominet Digital Youth Index, and other sources gives us a picture of the extent of digital exclusion, the multi-faceted nature of digital exclusion (there is no single statistic that captures the total number of people or households who are affected at any point **in time**), **the characteristics of people most likely to be digitally excluded, and the benefits of being digitally included.**

Figure 1: Digital Nation UK 2024



Source: Good Things Foundation

Lloyds UK Consumer Digital Index 2024

In November, the latest annual snapshot of Essential Digital Skills was released as part of the 2024 Lloyds UK Consumer Digital Index. The Index uses findings from a nationally representative sample survey to estimate how many adults can do all, some, or none of the practical tasks associated with Essential Digital Skills at three levels: the Foundation Level, the Essential Digital Skills for Life, and the Essential Digital Skills for Work. This tells us that:

- Almost **eight million adults (18%)** are still without the Foundation Level in the

UK today, of whom nearly one million adults are wholly digitally disengaged, and the remainder have the Partial Foundation Level only. Those most likely to be in this group are older; live alone; have lower levels of educational attainment; and/or have impairments or life-impacting conditions.

- Almost **four million adults (7%)** lack the Essential Digital Skills for Life with around 800,000 adults unable to do any of 26 tasks within the Life Skill level.
- Over **seven million** adults of working age (**18%**) lack the Essential Digital Skills for Work, of whom over **two million** cannot do any of the 20 tasks within the Work Skill level.

The Index highlights strong links between digital exclusion and personal, social, health, economic, and area characteristics. For example, among people without the Foundation Level: 50% **have no formal qualifications**, 77% are over 65 years old; and 69% have a disability or health condition. While the Index finds no significant difference in overall digital confidence and capability between men and women, the gender gap is increasing when it comes to the Essential Digital Skills for Work. Fewer women (44%) can complete all 20 essential tasks for work than men (52%).

Nominet Digital Youth Index 2023

The Nominet Digital Youth Index 2023⁸ highlights that 'digital access is now a prerequisite for learning, career development, social contact and so much more that is essential to a young person's wellbeing'. Yet around **two million young people (14%) lack access to a learning device (a laptop or desktop computer)**, and nearly **570,000 young people** lack both a learning device and home internet connection.

The report also draws attention to the continued impact of the high costs of living and its disproportionate impact on young people experiencing poverty. Almost **one quarter of young people (23%)** in receipt of free school meals are without broadband access at home, compared to **15%** across the population as a whole.

The Index also shows that as young people enter the world of further education or employment, their satisfaction with digital skills training decreases. **Over half of young people (53%) are curious about how they can use artificial intelligence (AI) in their lives**, although many are worried about what it might mean for future jobs. Research by The Prince's Trust⁹ shows that 71% of young people recognise that digital skills matter to employers.

Minimum Digital Living Standard for Households with Children Survey 2024

The Minimum Digital Living Standard for Households with Children Survey 2024¹⁰ used a measure defined by parents and young people to reflect social norms, and covering what families need in terms of: digital goods and services (e.g. **devices, broadband**); the practical or functional skills to engage online (e.g. managing data usage, using school **online systems**); and the critical thinking skills to understand and manage risks (e.g. managing social pressures and time online, evaluating friend requests, **secure passwords**). They also considered what would be different depending on the number of adults and children in a household, and the age or school stage of children. This information was used to develop a survey administered face-to-face with a nationally representative sample of 1,582 households with children. This found:

- **45%** of households with children did not meet the Minimum Digital Living Standard benchmark. Within these households:
 - **8.3% specifically lacked skills for children** (mix of all ages and skills)
 - **17% specifically lacked skills for adults** (mix of skills)
 - **7.2%** lacked the digital devices and/or connectivity but had the skills
 - **12.5%** were below the benchmark across all of skills, equipment and connectivity.

Statistical modelling found clear correlations between being below the benchmark and characteristics strongly associated with poverty: lower socio-economic status; living in a deprived area; single-parent households; households with more than two children; households **receiving at least one state benefit**; households where the lead respondent has a long-term health condition or **disability**; and/or identified as **ethnically non-white**.

Ofcom Communications Affordability Tracker

Ofcom's Communications Affordability Tracker¹¹ regularly monitors people's experiences of the affordability of communications services (combining home broadband, mobile phone, **landline and pay TV services**). The latest research, conducted in July 2024, highlights the close relationship between digital exclusion and poverty. Over **three-fifths (62%)** of households overall, and **86% of the most financially vulnerable households**¹², that found it **difficult to afford their communications services also had difficulty affording other household items and services**, including food, clothes and gas/electricity.

The Tracker also shows that only a third (**34%**) of eligible decisions makers were aware of broadband and/or mobile social tariffs. However, awareness is **significantly lower among households** that are only able to access the internet using their mobile phones. Less than a quarter (**23%**) of mobile-only households were aware of social tariffs for **fixed broadband**, and **11%** for **mobile** (compared to 35% and 14% respectively for households that also have access to **fixed broadband**).

DCMS Participation Survey 2023/24

The Department for Culture, Media and Sport (DCMS) Participation Survey 2023/2024¹³ (which, as an online survey, has limitations in terms of understanding **digital inclusion**) shows that the likelihood of having **engaged in digital or online skills training** is higher among younger age groups, non-disabled adults, males, **all other sexual orientation classifications** other than heterosexual or straight adults and higher socio-economic **classifications**.

The Survey shows that for adults over the age of 54 years old, their **engagement with training decreases steadily**, from 40% for the age group 55–59 years old, to 5% for adults aged 80 or over.

The Survey also highlights wide variation in engagement among adults of **different religious groups**. For instance, **Hindu adults (48%) were more likely to have taken training in digital or online skills than Christian (33%), Jewish (35%), Muslim (36%), and adults of no religion (38%)**.

Engagement also varies among adults based on ethnicity. For instance, adults **from Chinese (36%), black African (50%), mixed white and black African (50%), any other white background (42%), or any other ethnic group backgrounds (43%)** were more engaged than white British adults (34%).

⁷ Good Things Foundation (2024), [Digital Nation 2024](#) and Good Things Foundation (2024), [Digital inclusion: What the main UK datasets tell us](#)

⁸ Nominet (2023), [Digital Youth Index](#)

⁹ The Prince's Trust (2024), [Decoding The Digital Skills Gap](#)

¹⁰ Yates, S et al (2024), [Minimum Digital Living Standard for Households with Children](#)

¹¹ Ofcom (2024), [Communications Affordability Tracker](#)

¹² Ofcom's definition of financial vulnerability is based on a measure that combines household income, working status and the size of the household.

¹³ Department for Culture, Media and Sport (2024), [Participation Survey 2023/2024](#)

3. The nature and extent of digital exclusion in the West of England

Insights from the West of England Mayoral Combined Authority's **State of the West of England 2024** report¹⁴ suggest a complex picture given different demographics and geographies. Whilst the region has many strengths, some communities and parts of **the West of England do not benefit from the region's prosperity, due to factors including** lack of training and job opportunities, low income and educational attainment, poor connectivity, and poorer health and wellbeing.

Ofcom data on internet usage in the West of England

Bespoke analysis of Ofcom data on internet usage¹⁵ conducted as part of this project, shows that the West of England Mayoral Combined Authority region is **'middle of the road'** as compared to similar areas in the UK- not as digitally included as London but more so than some other regions.

Table 1: **Internet usage (cluster analysis) modelled for West of England Mayoral Combined Authority region**

Type of user	UK	West of England (%)	West of England (population)
Extensive users	24.0%	28.0%	227,892
General users (social media)	21.9%	18.3%	149,092
General users (limited social media)	12.6%	16.1%	131,381
Limited (social media) users	10.9%	12.4%	101,078
Limited (no social media) users	11.9%	11.8%	96,304
Very limited	10.9%	8.4%	68,631
Non-users	7.9%	4.8%	39,227

Source: Ofcom/University of Liverpool

Minimum Digital Living Standard (MDLS) for Households with Children 2024

Regional analysis of the Minimum Digital Living Standard (MDLS) for Households with Children 2024 estimates that around **39–41% of households in the West of England region fall below the MDLS Households with Children benchmark average** for the UK as a whole. This aligns with the Ofcom data analysis, suggesting that the West of England is 'middle of the road', with higher levels of digital inclusion than other combined authorities including Greater Manchester, Liverpool City Region and the North East of England.

Table 2: Minimum Digital Living Standard for Households with Children, West of England

Local authority	Average households with children below the MDLS Households with Children benchmark	Estimated number of households with children below the MDLS Households with Children benchmark
Bath and North East Somerset	0.39	19,171
Bristol	0.41	46,495
South Gloucestershire	0.39	32,139

The maps below show MDLS scores for each local authority, grouped into high (red), medium (orange), and low (green), to show how far areas fall below the Standard. As with the Digital Exclusion Risk Index, most areas fall within the 'medium' category. There is some overlap between the areas that are shown to fall the lowest beneath **the MDLS and areas of high deprivation identified in the State of the West of England 2024 report¹⁶** (for example, Lawrence Hill in Bristol, and Twerton in Bath and North East Somerset).

Figure 2: Bath and North East Somerset mapped against the Minimum Digital Living Standard (MDLS) for Households with Children 2024



Figure 3: Bristol mapped against the Minimum Digital Living Standard (MDLS) for Households with Children 2024

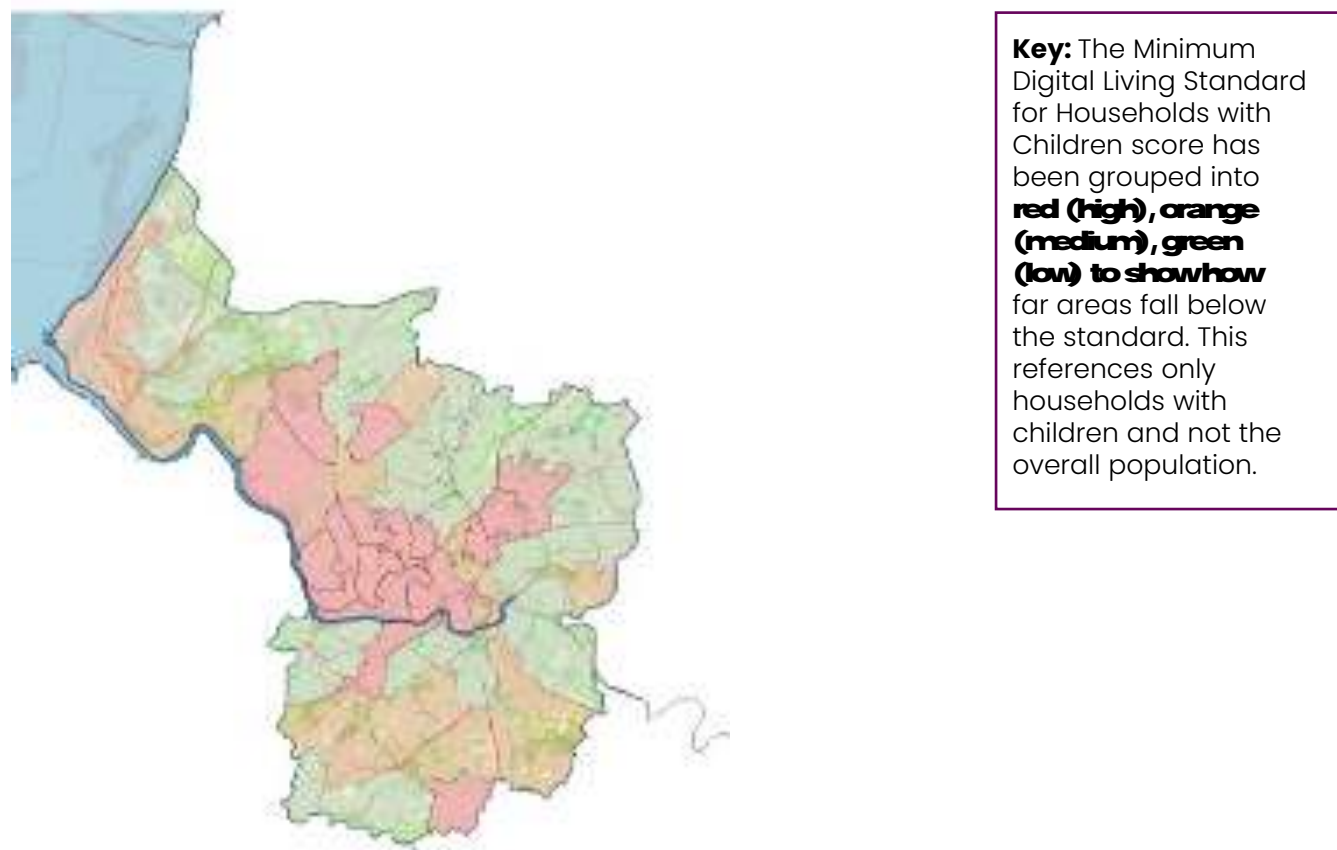
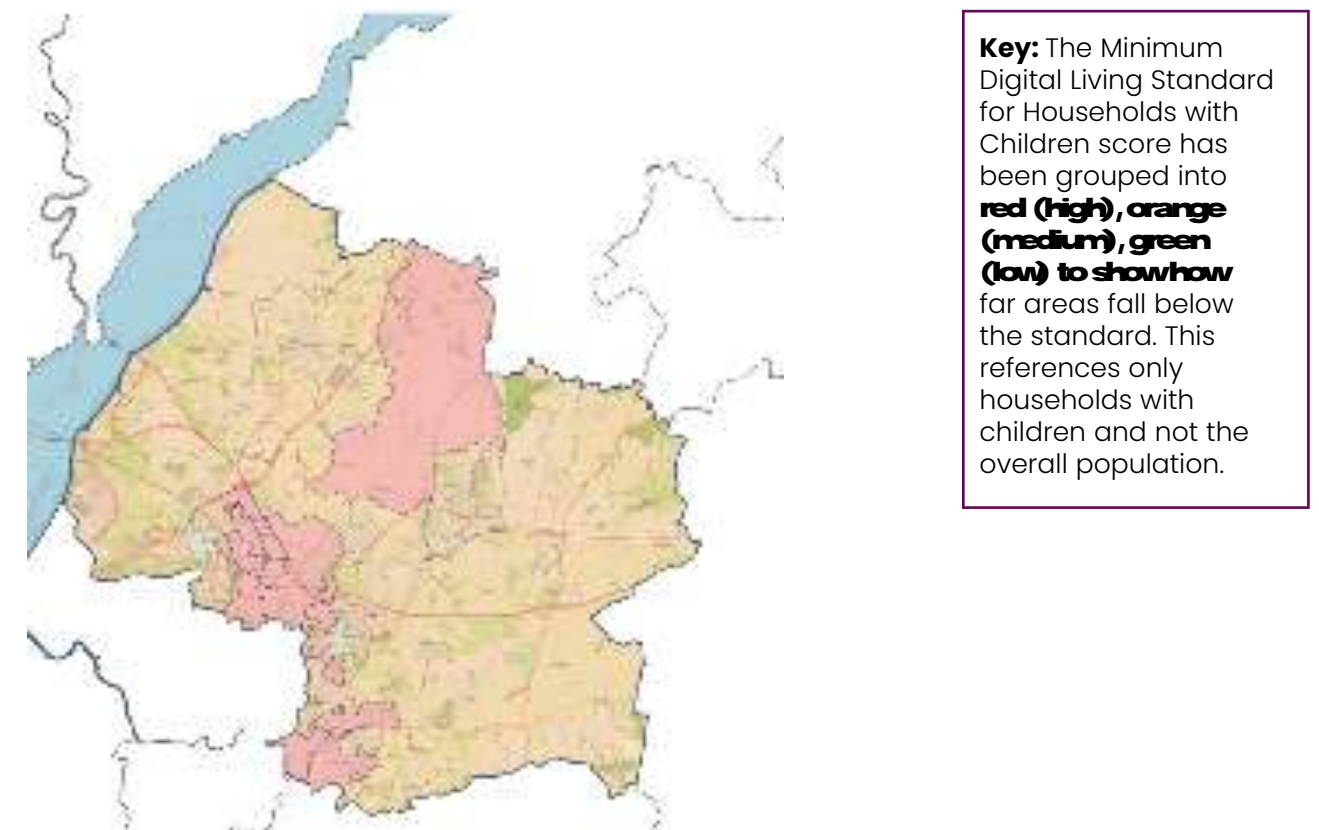


Figure 4: South Gloucestershire mapped against the Minimum Digital Living Standard (MDLS) for Households with Children 2024



The West of England Digital Plan 2023¹⁷ highlights key strengths within the region, including **distinctive creative, digital and tech sectors**, and says that, 'the region is often highlighted nationally as a **'Tech for Good' hub, based on the prominence of organisations aiming to have a positive societal impact.**'

While the West of England has thriving digital innovation and infrastructure, many residents still **lack access to essential digital resources**, particularly in more deprived areas. Digital exclusion is deeply intertwined with other forms of disadvantage, including **poverty, unemployment and lack of education**. The State of the West of England 2024 report highlights that the region has **significant disability and minority ethnicity employment gaps**, and the **number businesses who struggle to fill job vacancies is higher than the national average**. Individuals and small businesses also need support with starting or growing their businesses, particularly those who may lack digital skills and tools to succeed.

In Bristol, the Quality of Life Survey 2023/24¹⁸ **highlights that confidence** in digital skills has declined over the past year, and there are wide gaps in responses for different groups. For example, 25.9% of full-time carers said they were uncomfortable using digital services, compared to 9.4% overall.

However, research by Bristol University and Knowle West Media Centre¹⁹ highlights a complex picture, stating that use of digital is higher than might be expected within some deprived neighbourhoods. Conversely, digital upskilling and reskilling **is a priority in more affluent areas as new, green jobs require different types of training and skills.**²⁰

Likewise, the Lloyds UK Consumer Digital Index (2024)²¹ highlights that while a higher percentage of individuals in the South West (the closest geographical category available) **possess fundamental digital skills** compared to the national average, a slightly lower than average percentage of the workforce possess essential digital skills for work (82% across the UK, 79% in the South West).

3.1. Residents' experiences of digital inclusion

An overview of the people and communities most affected by digital exclusion in the West of England are set out in Table 3 below, highlighting a digital divide based on characteristics including age, language, socio-economic status, health and social inclusion, and geography.

Table 3: People and communities most affected by digital exclusion

Characteristic	Priority groups
Age	Older people, especially people over 60 years old, young people seeking employment, and people over 40 with few or no qualifications
Language	People who are less fluent/confident in using and understanding the English language
Socio-economic disadvantage	People who are unemployed, people on low incomes, people with lower levels of literacy, people with few or no qualifications, single parents, carers people living in areas of high deprivation
Health	People with long-term health conditions, people with mental health issues, people with physical and learning disabilities, care home residents
Social exclusion	Veterans, people experiencing addiction, people experiencing homelessness, people in contact with the criminal justice system, people experiencing domestic abuse, refugees and people seeking asylum
Geography	People living in areas with inadequate broadband and mobile data coverage (for example, rural communities in Bath and North East Somerset, and South Gloucestershire), people living in more urban, digitally connected areas but with higher levels of deprivation and/or poor transport links (for example, South Bristol)

During workshops²² with people who have lived experience of digital exclusion in the West of England, residents explained that they use digital tools and services across many aspects of their lives. This includes, for example, searching for jobs, studying and/or finding information, online shopping, ordering prescriptions, online banking, checking emails and entertainment.

Residents use a variety of devices to get online, including laptops and mobile phones. Most commonly, they use smartphones, supported by either mobile data or Wi-Fi (either at home or in public spaces).

Key barriers to digital inclusion

Residents, and the organisations supporting them, identified several key barriers to digital inclusion, which are reflective of challenges identified through quantitative analysis.

Affordability of digital tools and services

Providers and other stakeholders highlighted that poverty is a significant barrier to digital inclusion, with individuals often having to choose between basic needs (such as food, medicine and heating) and digital access. They noted that these challenges are sometimes hidden from view, with both Bristol and Bath characterised by thriving wealthier areas, while nearby communities lack access to the same resources.

"If you get £45 a week to live on... you prioritise other things, like food or medicine." (Provider)

Concerns were also raised about a 'poverty premium', with people who are already digitally excluded finding themselves having to pay more for mobile or broadband services, despite being less able to afford them. Residents and providers alike highlighted that there is a widespread lack of awareness about social tariffs that could help reduce costs. Likewise, a shift towards digital-only public services, including transport and healthcare, can disadvantage digitally excluded people.

"They [my internet provider] basically said no, there's no social tariff... even though I could prove I was on Universal Credit, they still wouldn't do that." (Resident)
"People in social housing... have specific [social] tariffs that are available to them, which we've discovered are actually more expensive." (Provider)

"You can't buy a return for the bus unless you do so on the app... it's making transport more expensive." (Provider)

Access challenges are also evident among young adults who may be skilled in using mobile apps but struggle with more formal digital tasks, like writing CVs or applying to college. Providers expressed concern that a lack of consistent access to the right types of technology (in this case, a PC or laptop) can hinder young people and prevent them from reaching their full potential.

"What we are sometimes seeing is young adults coming through... they're digitally capable on a phone with apps... but actually if it's something more substantial... being able to write a letter of application or a CV, they struggle." (Provider)

Awareness of digital inclusion support

Many residents highlighted that they have accessed support from libraries and local charities for help to get online. Residents were highly positive about the support they have received, particularly when it is one-to-one, and several would like to be able to access support more frequently. Some residents also talked about the indirect benefits attending digital skills training, which they felt had helped to reduce their feelings of loneliness and isolation.

"The library is very good here. If you get there early, you can get space." (Resident)

"I was given a charity laptop, an old model... I was grateful because I was actually saving up couple of hundred [pounds] for something really basic." (Resident)

"It's about being confident digital skills and getting confidence, but it's also about the social side as well." (Resident)

Some residents said it is difficult to find out about the digital inclusion support available to them. They expressed a desire for provision to be better publicised, including signposting by other services they may access (e.g. Jobcentres). Others suggested there could be a more joined-up approach across the region, coordinating efforts to help people find the support they need.

"There needs to be better publicity for accessing these services... it's hard to know about them unless you hear by word of mouth." (Resident)

"I don't think the Jobcentre necessarily tells you about these other organisations that can help you with technology or training." (Resident)

"I think there are things out there for people who are not as confident... but whether there's enough of it, I don't know." (Resident)

"The issue is that people accessing that provision is kind of quite difficult. And it can be a massive rabbit sort of hole to go down." (Stakeholder)

Access to digital inclusion support

Residents and organisations alike highlighted specific accessibility challenges for people in rural and less well-connected urban areas (reflecting wider issues about transport and connectivity in the region²³). There is a shared sense that access to digital inclusion provision relies on residents' ability to travel to a city or town centre, which may be limited by geography, health or other barriers.

"When we moved here there were... buses going to Yate twice an hour... it's been cut down to half-hourly... and often cancelled." (Resident)

"A lot of young people... have a hard time even getting to the city centre because they don't have that means, and they don't feel confident that they actually are part of ... the city centre." (Provider)

"Transport is a major issue, And I know that sounds a bit bizarre when we talk about digital inclusion, but it's not because to access support, people need to walk through our front door. But if they only have one bus a day that comes into their village..!" (Provider)

Alongside challenges associated with geography and proximity, stakeholders expressed concern about a lack of digital inclusion support for particular groups. For example, this includes older people, who are not necessarily seeking employment opportunities but may have other motivations for being digitally connected (for example, social connection and relationships with family members). One resident shared that people of his age (over 80) sometimes felt pressured into using digital devices, as certain services are no longer available without them.

"I worry potentially that there is a gap if you look at the older community who aren't maybe heading into work... that doesn't seem to be a strategic goal [in the region]." (Stakeholder)

"When we're talking about getting older people online... on the face of it, it's to make their life easier, but actually it's to make them less lonely. Because that's the killer." (Provider)

Accessibility and design

Residents and providers shared that poorly designed digital tools can hinder access to essential services and observed that the majority do not cater to accessibility needs (for example, larger fonts), or the needs of people who do not speak English as a first language.

One resident with mobility issues highlighted that the size and design of smaller devices, especially smartphones, affected his ability to use them comfortably. Another spoke about their experiences of ADHD, which they said made it difficult for them to access digital services without clear and comprehensive instructions.

"We work with people that have many languages, so it's difficult to do that." (Provider)

"If the systems that people are accessing, or trying to access, are not [accessible and inclusive], you're basically shutting out a significant proportion of the population before you even start." (Provider)

"I have problems with my hands. I can't use these little phones. It would be easier to have something bigger." (Resident)

Other residents said they preferred to access face-to-face services, highlighting that their experiences of navigating complex systems, like the Jobcentre or welfare support, is both time-consuming and frustrating.

"I'd rather go to the cash machine and get money out. That's how I know how much I've got to spend." (Resident)

"You only get limited information [online] ... sometimes doing things in person actually is easier." (Resident)

Concerns about digitalisation

Residents said that the rapid pace of technological change sometimes discourages them from engaging with digital tools and services, and some spoke about the short life span of devices such as smartphones, which are often rendered obsolete quickly and are expensive to replace.

"Once you buy like a smartphone, it's already very quickly out of date... I feel like none of my phones work beyond about two years anymore." (Resident)

Others raised concerns about how they will be able to keep pace with future workforce needs, underpinned by fears that artificial intelligence (AI) will negatively affect their employment opportunities. Some residents described feeling scared and overwhelmed

by these advancements. This was echoed by some providers, who expressed worries for people who are developing basic digital skills but may struggle with more advanced technologies.

"The problem is that I... just can't keep up with the technology." (Resident)

"We're obviously at the moment going through this rapid, maybe slightly scary, growth in things like artificial intelligence technologies... [I'm worried for] the future of jobs and what those are going to look like." (Resident)

"I think we're going to get another layer of digital exclusion coming along... people will understand the basics but struggle with the next step. AI is the next thing that is going to deepen the digital divide." (Provider)

Concerns about social media

Some residents said they felt discouraged from getting online due to concerns about social media, focusing on its negative impacts, including risks of online abuse, concerns about privacy, and time-wasting.

"People are killing themselves over it [social media] ... someone has made a horrible threat and so on... I've never had any interest in that anyway." (Resident)

"I like Internet to watch what is happening every day... if I don't get Internet, I'm sick." (Resident)

"I feel like sometimes technology is a bit addictive... you can just be scrolling adverts... I don't really have that kind of inclination to be influenced to do certain trendy things." (Resident)

"I don't have mobile banking because I've seen too many horror stories." (Resident)

3.2. Businesses' experiences of digital inclusion

Analysis of 442 digital skills audits completed by staff and volunteers who have participated in training with Cosmic highlights a range of key issues, including **low digital confidence and training needs, lack of awareness of advanced digital tools, and connectivity and remote access challenges**. This is echoed by other skills providers in the region, one of whom said, **"we have a number of small businesses that have existed for years and years... there's just a complete lack of basic digital skills around finances, around word processing, around social media around websites, etc."**

A key issue to emerge is **lack of awareness and time to engage with advanced digital tools**. Almost **two-thirds (65%) of staff working in education** and 70% of staff working in housing associations primarily use basic Microsoft 365 features, with minimal engagement in advanced tools like SharePoint and Power Automate, which could streamline operations. **Three-quarters (75%) of staff in health and social care** rely on WhatsApp instead of more comprehensive tools like Teams, revealing an opportunity to introduce collaborative platforms.

The digital skills audits also highlight that many businesses have been affected by **hybrid and remote work arrangements**. For example, 35% of higher education, 40% of hospice staff and 45% of charity staff noted issues with remote access and device syncing, affecting productivity. Only 25% of charity staff, and 30% of education and housing association staff are aware of the capabilities within the Microsoft 365 suite, indicating a need for increased guidance.

Training needs also vary between sectors, highlighting the need for a nuanced approach. For example, staff in housing association tended to **show moderate digital confidence but minimal engagement with digital tools**. By contrast, staff in the charity sector demonstrate low digital engagement **and confidence, underscoring a need for practical, sector-relevant training and role-specific support to accelerate digital adoption**.

¹⁴ West of England Mayoral Combined Authority (2024), [State of the West of England 2024](#)

¹⁵ Ofcom (2024), [Technology Tracker 2024](#)

¹⁶ West of England Mayoral Combined Authority (2024), [State of the West of England 2024](#)

¹⁷ West of England Mayoral Combined Authority (2023), [West of England Digital Plan](#)

¹⁸ Bristol City Council (2024), [Quality of Life Survey 2023/24](#)

¹⁹ Lee, C et al (2024), [How wide is the divide? Assessing digital inequality in Knowle West](#)

²⁰ University of Bath, Bath Spa University, Bath & North East Somerset Council and the Royal United Hospitals Bath NHS Foundation Trust (2024), [Future Ambition Civic Agreement](#)

²¹ Lloyds Banking Group (2024), [Consumer Digital Index 2024](#)

²² Cosmic conducted three workshops with residents in the West of England (in Bath and North East Somerset, Bristol and South Gloucestershire). Residents invited to participate have lived experience of digital exclusion, and were identified based on their engagement with existing digital skills support programmes.

²³ West of England Mayoral Combined Authority (2024), [State of the West of England 2024](#)

4. Digital inclusion provision in the West of England

Basic digital skills – having skills and confidence to engage online safely for life and work

Specialist providers play a crucial role in supporting people from diverse backgrounds, such as refugees, migrants, people recently released **from prison, and those feeling domestic violence**, by helping them develop the digital skills necessary to engage with modern technologies and participate fully in the workforce. Many organisations also extend their support to businesses, particularly startups, by offering guidance on essential business operations, helping them adopt digital tools, and providing expertise on using data and improving business processes.

Royal United Hospitals Bath NHS Foundation Trust

The Royal United Hospital (RUH) in Bath is working to tackle health inequalities and digital exclusion at the same time, by helping patients access and use technology to manage their health conditions and improve their wellbeing. The hospital has created new dedicated roles to help patients with the use of technology in an increasingly digitalised healthcare system. The team can support patients with using the NHS app, accessing medical electronic letters, engaging with health forum or community groups online and the use of wearable health devices.

Recognising that digital exclusion is often linked to other societal inequalities the team also helps patients to access services in the community to address non-medical needs that affect people's health.

Hospital stays or hospital appointments often present "teachable moments" where patients are more receptive to information and learning. During this time, the digital inclusion team supports **patients to develop confidence and skills** to use technology safely. By integrating technology with patient care, RUH Bath seeks to improve health access and equity across its patient population.

Community support – having access to trusted support to learn new things and get help

Libraries and other public spaces are highlighted as neutral venues that can host digital inclusion activities, allowing people to access technology and training without judgement. This is particularly important when offering workshops, such as those for English as a second language or women's-only sessions, which allow participants to feel comfortable.

Within healthcare contexts, a key focus of primary care is supporting uptake of the NHS App. In some secondary care settings, there is also a focus on supporting in-patients with digital inclusion, taking advantage of 'teachable moments' during their hospital stay.

Many organisations working with people facing complex issues (e.g. domestic **abuse, homelessness**) **are not digital inclusion specialists** but recognise the importance of getting online. VCFSE organisations are highly trusted, building **confidence and creating safe spaces** for people to engage with skills and resources.

Age UK South Gloucestershire

Age UK South Gloucestershire's Digital Support Service is available to support anyone over the age of 50 living in South Gloucestershire who would like to know how to access the internet, use new technology, stay connected or access vital services.

The Digital Inclusion Programme aims to address digital skills support, and provide relevant technology and connectivity, through learner-led sessions delivered by staff and volunteer digital champions.

The sessions seek to inspire and motivate older people to get online and encourage and support them to develop their digital **skills and confidence in group or one-to-one sessions**. Participants can also loan tablets and internet connectivity, enabling **them to gain confidence in using digital tools** for free.

Alongside direct delivery, multiple networks are playing a key role in creating the conditions for greater digital inclusion (for example, Tech4Good South West **and the Digital Divide Collective**). These networks are perceived to be critical in spotting opportunities and aligning work programmes around digital inclusion across spaces and sectors.

The Digital Divide Collective

The Digital Divide Collective is an innovative partnership working to address digital poverty in Bath and surrounding areas, particularly in disadvantaged communities. The Collective is taking a collaborative, community-driven approach, bringing together tech companies, local businesses and the VCFSE sector, anchored by Bath Bridge CIC and Tech4Good South West.

The Collective currently aims to serve the most disadvantaged areas of the city, particularly Twerton and Whiteway, and there is growing energy in the Collective's work. Alongside working to raise awareness of digital poverty in Bath, the Collective's activities have ranged from mapping the challenge to prototyping solutions and advocating for action. They have also adopted a 'digital playground' approach, providing spaces to create curiosity and interest, engage people in play, and is both interactive and inspiring.

The Collective believes it is filling a critical gap in addressing digital exclusion in the region. Their future plans include continuing to strengthen relationships with regional stakeholders, bringing together greater resources and knowledge to address community challenges – piloting projects, learning what makes a difference, and growing from there.

Design – digital services and initiatives that are designed for accessibility and inclusion

A key strength in the region's approach to accessible and inclusive design is the emphasis on bridging the creative and tech sectors. This cross-sector collaboration offers a valuable opportunity for innovation, with the potential to improve accessible design practices.

Additionally, many VCFSE organisations are actively designing accessible digital tools for the people they support. For example, an independent living charity has developed a digital tool to help disabled people co-produce their support plans, showing a commitment to community-centred design.

Knowle West Media Centre

Our Digital City at Knowle West Media Centre (KWMC) aims to create a truly inclusive 'smart city' where no one is left behind and everyone can access the benefits of technology. Beyond Knowle West, the team is working closely with Hartcliffe and Withywood, St Pauls, Easton, Barton Hill, Lockleaze and Southmead. KWMC is connecting people using creative approaches to new technologies, supporting social change and developing resources for the city. Examples of their work include:

- **Online digital skills with Our Digital City:** As part of their ongoing mission to equip community organisations with the digital skills necessary the modern world, Our Digital City delivered a series of filmmaking workshops via online video conferencing during the period of national lockdown.
- **Film training programme:** The Our Digital City team worked with Hartcliffe & Withywood Community Partnership (HMCP) to teach a group of local residents and community leaders how to shoot, edit and produce their own short film, showcasing the excellent volunteer work being done by local residents and groups within their community.
- **Co-creation with WECIL:** The Our Digital City team took several laptops and digital drawing kits to the Creative Challenge sessions run by the West of England Centre for Independent Living (WECIL). Every participant got the chance to try out the kit and the software and enjoyed the new and interactive way of creating art.

4.2. Challenges and considerations for digital inclusion providers

Funding for digital inclusion provision

To date, funding for digital inclusion in the region comes from a range of sources, including: the Combined Authority Investment Fund (for example, the Adult Skills Fund); local authority core funding; Integrated Care Boards; business investment; and grant programmes. Many have also benefited from the UK Shared Prosperity Fund, although there is concern that this may soon come to an end.

Many stakeholders highlighted an increasing reliance on short-term funding and a lack of coordination between funding streams. A recurring theme is the challenge of accessing funding for smaller organisations that don't have the capacity to manage large grants, despite their deep community connections.

"Everything is funded on really short timescales. If you find anything that's funded for even two years, that's unusual." (Provider)

"Digital inclusion is all about ongoing support which isn't necessarily always available, because usually these projects are timebound. I guess the question is, 'where do people access support following when funding ends?'" (Provider)

"There's lots of different funding that's coming out for very short-term amounts of money." (Provider)

Some providers have chosen to use the funding available to them in innovative ways, for example ring-fencing funding to prioritise the needs of the most marginalised communities, saying **"being able to access those communities where we don't always have a direct impact just amazing. . it allows them [people who are digitally excluded] to take that next step."**

Digital capabilities and capacity within the VCFSE sector

Some stakeholders expressed concern that VCFSE organisations are expected to meet the needs of people experiencing high levels of digital exclusion and play a **key role understanding the needs of specific populations (for example, migrant communities, unemployed adults) – but do not currently have access to the resources they need to build their own digital capabilities.** Alongside this, many VCFSE organisations are experiencing – as highlighted in research by Quartet Community Foundation – challenges associated with increasing scale and complexity of need, with reduced levels of funding.²⁴

"The task is to... have a combination of different community organisations that can help build relationships with particular parts of the community, understand what their specific issues are, and build solutions from there." (Stakeholder)

"An area of concern is around digital skills within the VCFSE sector. Obviously, they're supporting priority communities, but I think they themselves do not have access to the same resources, the same capabilities, the same structures that are supporting commercial sector organisations and programmes that are growth focused." (Stakeholder)

Linked to this, a challenge remains in ensuring that tools and services are co-created with communities themselves. Stakeholders observed that to be valuable, accessible digital solutions must not only be well-designed but must also be grounded in the lived experiences of the communities they aim to serve. VCFSE organisations are perceived to be critical to this process due to their research into communities but need the skills and capacity to do so.

Intermediate digital skills

While basic digital skills provision is widely available across the region, some stakeholders highlighted that there is an absence of support for intermediate-level digital skills, especially in specific areas, such as South Bristol, where there is little provision for adult learners to upskill beyond entry-level courses. Others noted that funding has shifted focus towards upskilling existing employees rather than helping those who are out of work or transitioning to a new career. Addressing this gap, particularly for people who are seeking careers beyond entry-level but do not yet have higher digital skills, is considered crucial.

"You can go and do a course to use a fancy bit of software. Or you can do a course to learn a basic process. It's the middle bit that's never really had the light shone on it. That would be the area I'd be looking at." (Provider)

"There is no middle ground [in digital skills provision] for me, especially from the area we deliver in which is South Bristol. If you look at our schools, our colleges, none of them are offering mid-level courses, especially for adults. So that is something completely lacking in this area especially." (Provider)

"There is a major gap ... you can get an entry-level admin job but there is no route through all the way through to Level 5 equivalent roles." (Provider)

"There's no funding for Level 2 courses in IT anymore... you can get funding Level 1 and then you can get funding for Level 3. There's no Level 2 funding." (Provider)

4.3. Mapping current provision

VCFSE organisations, education & skills providers, local authority services and businesses all play a key role in providing digital inclusion support in the West of England, ranging from entrepreneurship and startup support to helping marginalised people and communities overcome digital barriers.

At least 198 organisations are currently providing some form of digital inclusion support. In some instances, this may be delivered as a standalone programme, but in many cases is embedded as a smaller component within broader business, educational or community initiatives.

Figure 5: Digital inclusion providers in the West of England



Among the providers identified are 66 digital inclusion hubs, who are part of the Good Things Foundation Digital Inclusion Network²⁵. The Network is made up of over 5,000 organisations supporting their local communities with digital inclusion to different degrees. Some organisations draw on resources available through Good Things Foundation, such as free mobile data through the National Databank²⁶ or use the online learning platform to support beginner digital skills training – Learn My Way²⁷. A small number have applied for and received devices through the National Device bank. Some have accessed digital inclusion small grant opportunities from Good Things Foundation's Fix The Digital Divide Fund, and several have accessed training and peer support sessions provided for Network members.

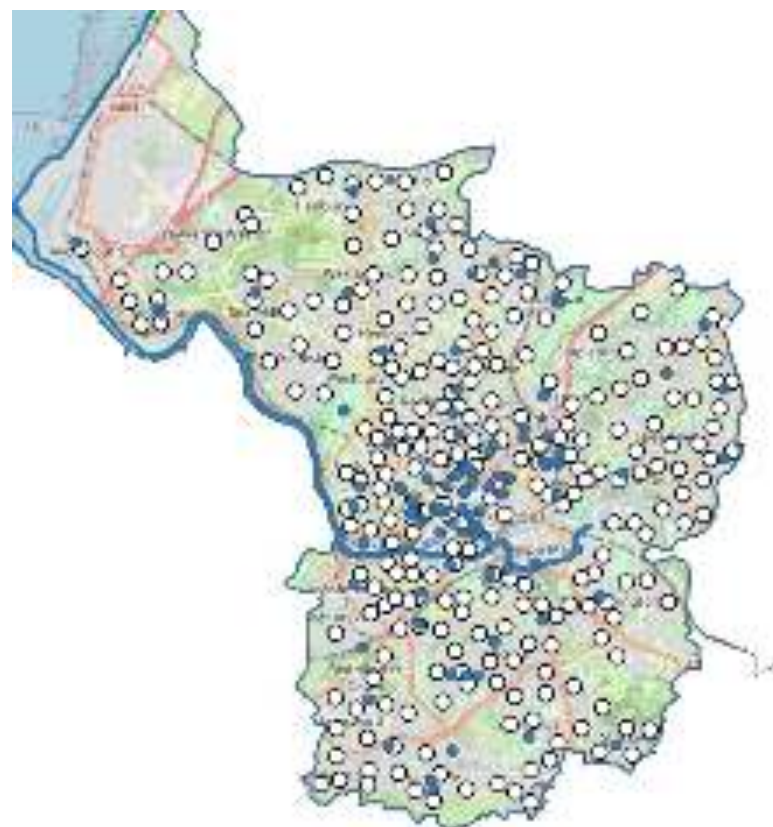
Key: The blue dots show organisations currently providing some form of digital inclusion support.

4.4 Alignment of digital provision to community needs

It is possible to observe the extent to which existing digital inclusion provision in the West of England aligns with community needs by comparing the geography of provision with population density and datasets including the Minimum Digital Living Standard for Households with Children²⁸ and Digital Exclusion Risk Index (DERI, developed by Greater Manchester Combined Authority, visualises the risk, or likelihood of digital exclusion for every Lower Super Output Area (LSOA) in England and Wales (and every data zone in Scotland). It brings together a broad range of information about factors that are associated with digital exclusion, including age, disability, deprivation, broadband connectivity, **poverty, and skills**)²⁹.

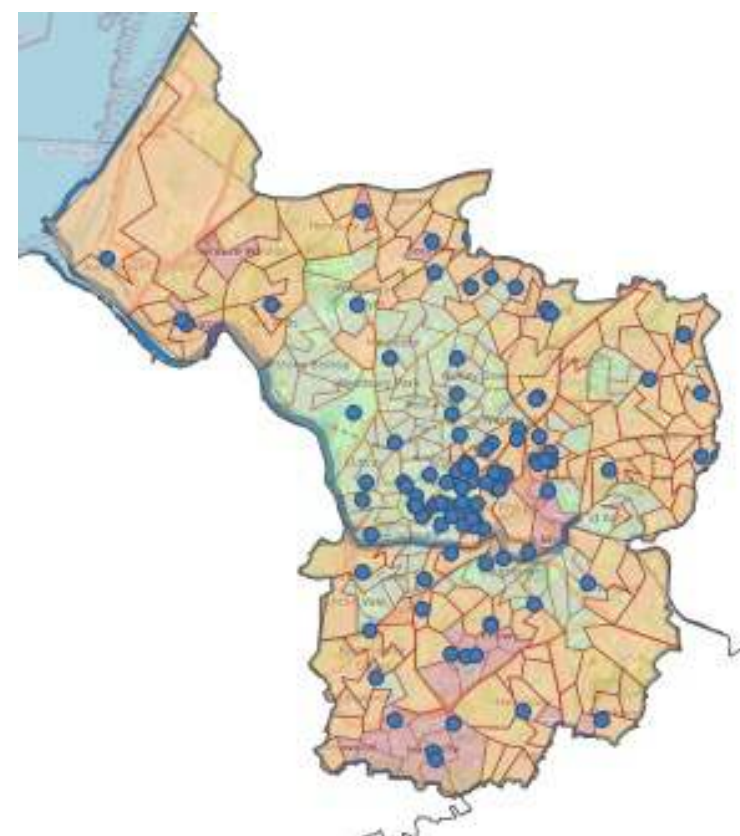
In each of the images below, the white dots show where the **population** is concentrated. In all cases, digital inclusion provision is indicated in blue, and areas of population concentration are indicated in white. The **Digital Exclusion Risk Index (DERI) score has been grouped into high (red), medium (orange) and low (green)** risk factors for digital exclusion. The **Minimum Digital Living Standard for Households with Children (MDLS) score has been grouped into high (red), medium (orange) and low (green) to show how far areas fall below the MDLS benchmark.**

Figure 6 Digital inclusion provision in Bristol, mapped against population density



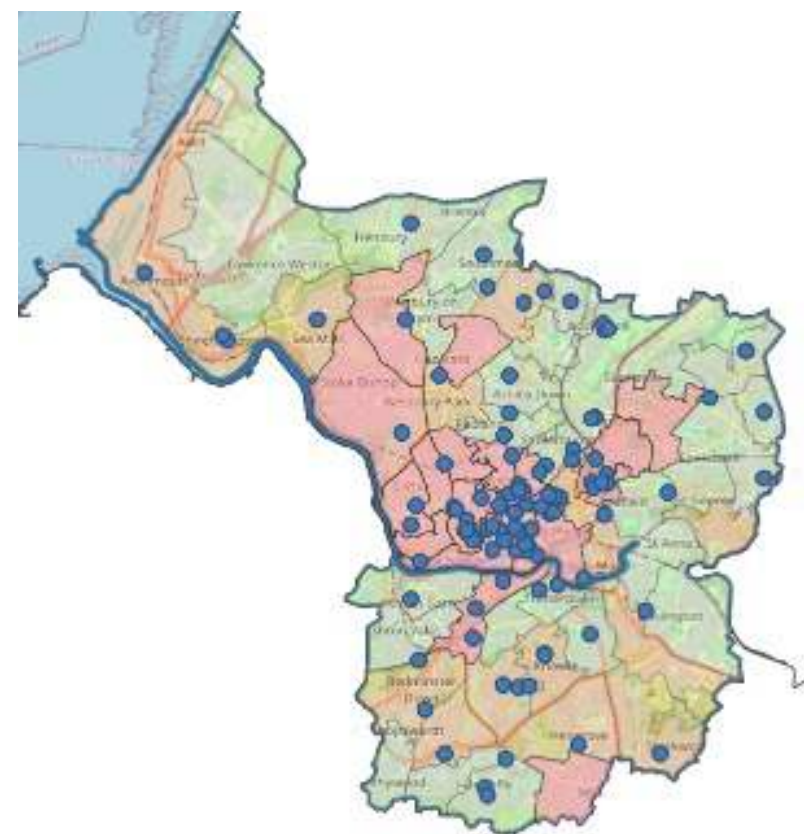
Key: The blue dots show organisations currently providing some form of digital inclusion support. The white dots are Population Weighted Centroids, which is the central point for the population of an area.

Figure 7: Digital inclusion provision in Bristol, mapped against the Digital Exclusion Risk Index (DERI)



Key: The blue dots show organisations currently providing some form of digital inclusion support. This has been mapped against Digital Exclusion Risk Index scores, grouped into **red (high), orange (medium), green (low)** to show the likelihood of being digitally excluded.

Figure 8: Digital inclusion provision in Bristol, mapped against the Minimum Digital Living Standard for Households with Children



Key: The blue dots show organisations currently providing some form of digital inclusion support. This has been mapped against Minimum Digital Living Standard for Households with Children scores, grouped into **red (high), orange (medium), green (low)** to show how far areas fall below the standard.

Figure 9: Digital inclusion provision in Bath and North East Somerset, mapped against population density



Figure 11: Digital inclusion provision in Bath and North East Somerset, mapped against the Minimum Digital Living Standard for Households with Children



Figure 10: Digital inclusion provision in Bath and North East Somerset, mapped against the Digital Exclusion Risk Index (DERI)



Figure 12: Digital inclusion provision in South Gloucestershire, mapped against population density

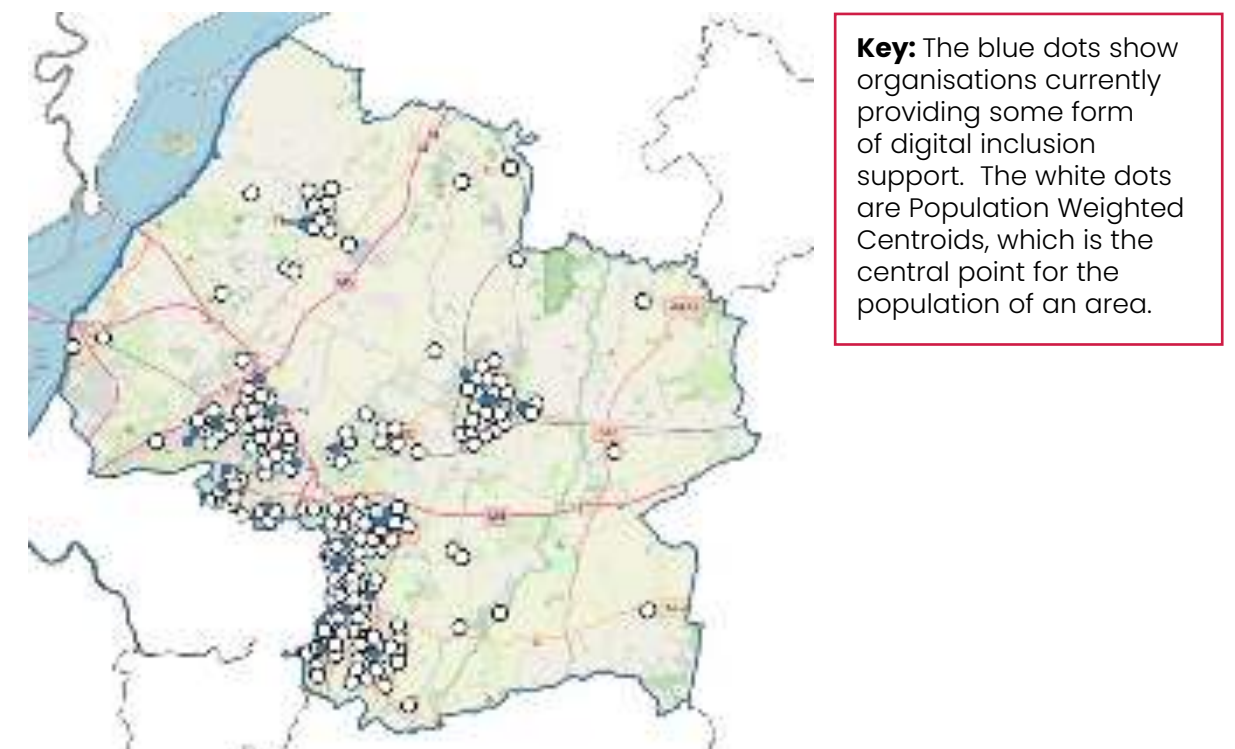


Figure 13: Digital inclusion provision in South Gloucestershire, mapped against the Digital Exclusion Risk Index (DERI)



Key: The blue dots show organisations currently providing some form of digital inclusion support. This has been mapped against Digital Exclusion Risk Index scores, grouped into red (high), orange (medium), green (low) to show the likelihood of being digitally excluded

Figure 14: Digital inclusion provision in South Gloucestershire, mapped against Minimum Digital Living Standard for Households with Children



Key: The blue dots show organisations currently providing some form of digital inclusion support. This has been mapped against Minimum Digital Living Standard for Households with Children scores, grouped into red (high), orange (medium), green (low) to show how far areas fall below the standard.

Across all three local authority areas, there is a broad alignment of digital inclusion with the highest concentrations of the population. Mapping against the Digital Exclusion Risk Index and Minimum Digital Living Standard for Households with Children shows that there is an apparent correlation between the location of digital inclusion provision and the highest levels of digital exclusion, although there **are some notable gaps that may benefit from further exploration (for example, parts of South and West Bristol, the outskirts of Bath, and to the north of South Gloucestershire).**

5. Opportunities

Digital inclusion is now a priority for the UK Government, held by the Department for Science, Innovation and Technology. While, at the time of writing, it is not yet clear what this means in terms of future strategy, actions, or funding from central government, it is nonetheless positive **that the department's draft definition of digital inclusion reflects a holistic approach across four pillars: Access, Skills, Digital Services, and Confidence.**

For a number of mayoral combined authorities, and devolved governments in Wales and Scotland, digital inclusion is already an established priority – albeit in a very challenging funding environment. Funding constraints combined with the relevance of digital inclusion to all aspects of people's lives and services, necessitates an approach which is holistic, cross-sector, collaborative; which **embeds** digital inclusion as a cross-cutting theme

in wider strategies and interventions (such as skills, health, education, civic **participation**); which recognises that digital inclusion is 'everyone's business'; and recognises the need for community support for those most disadvantaged. Together, these are hallmarks of digital inclusion approaches in the UK and internationally.

While recognising that digital inclusion is everyone's business, a key focus for this discovery project was to consider where the **West of England Mayoral Combined Authority** could add most value and drive impact. What are the opportunities for the Combined Authority to play a key role in improving digital inclusion for residents and for businesses? Which opportunities would stakeholders prioritise?

²⁴ Quartet Community Foundation (2023) *Vital Signs 2023*

²⁵ Good Things Foundation, *National Digital Inclusion Network*

²⁶ Good Things Foundation, *National Databank*

²⁷ Good Things Foundation, *Learn My Way*

²⁸ Yates, S et al (2024), *Minimum Digital Living Standard for Households with Children*

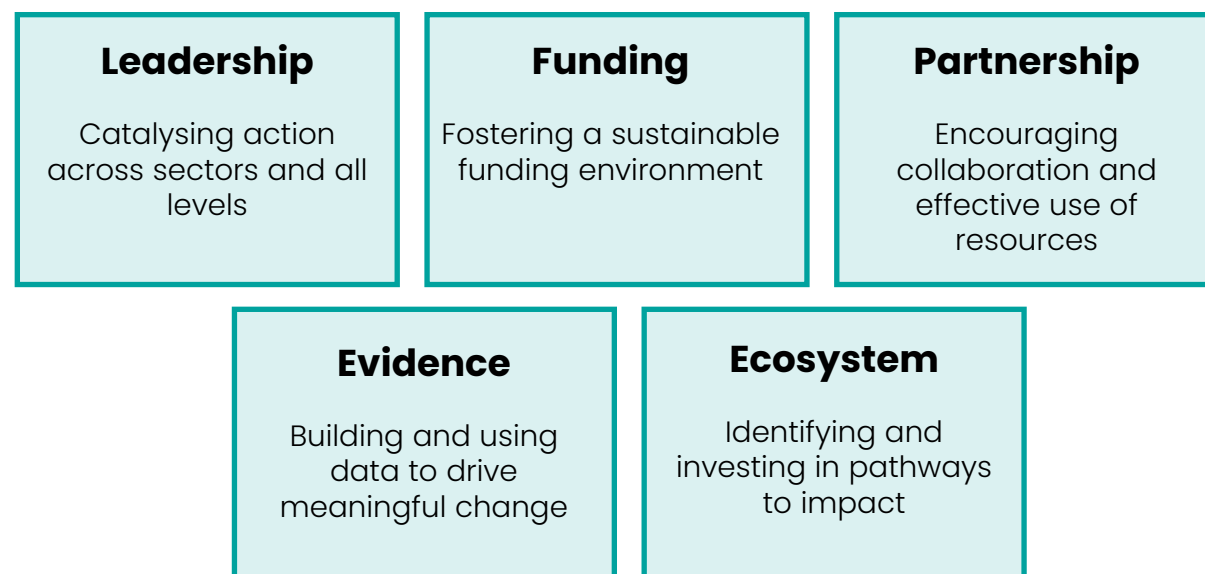
²⁹ Greater Manchester Combined Authority, Digital Exclusion Risk Index



5.1. Opportunities for the West of England Mayoral Combined Authority

"I'm so impressed by the [West of England Mayoral Combined Authority] team's willingness to understand and tackle issues around digital inclusion as part of the wider digital policy agenda. They have been so engaged with [our work] and been in a place to listen, understand and then take forward the key elements that matter." (Stakeholder)

Over ten weeks, we engaged more than 50 local or regional stakeholders. Many are very positive about the West of England Mayoral Combined Authority's engagement with the digital inclusion agenda to date. Through this engagement, and also drawing on experience in other parts of the country, **five key areas** emerged in which the Combined Authority could play a more active future role in promoting digital inclusion across the West of England: Leadership, Funding, Partnership, Evidence, and Ecosystem.



When tested with stakeholders, they saw the biggest opportunities for the Combined Authority to make a difference within the spheres of partnership and leadership, including the establishment of a West of England Digital Inclusion Network or Taskforce. This would convene cross-sector stakeholders to share knowledge, and drive collective action (**"not a talking shop"**). Other priorities were exploring new and better ways to use existing funding for digital inclusion, and co-creating regional digital inclusion goals and priorities with stakeholders.

Leadership – catalysing action across sectors and all levels

Stakeholders identified that the Combined Authority's unique position means it is ideally placed to introduce ambitious and transformative goals for digital inclusion in the region. There is a sense that the Covid-19 pandemic led to temporary solutions but left behind new challenges, including those relating to AI, governance and data management.

"You do need to have that kind of strategic oversight... local authorities are definitely better placed to reach into those community groups because they have existing networks. But... there does need to be a shift in thinking because the reality is there's less money available, we need someone who is setting the overarching priorities." (Stakeholder)

The Combined Authority is well-placed to raise awareness about the scale and impact of digital exclusion with stakeholders who may not recognise the issues, especially since the extent of digital exclusion is not as marked as in some other English regions.

Some felt the Combined Authority could lead on creating a bolder narrative about tackling the digital divide, within the context of an existing regional narrative which celebrates Silicon Gorge, tech and the creative industries (**"a story of Two Gorges"**).

Building awareness within the tech sector is perceived to be key: **"How do we make the tech sector more responsible... to participate in this narrative?"**

"One of the things we've come up against is, particularly in the commercial sector, they don't see this problem exists. They are thinking, 'Surely people have the devices they need', 'Surely people have the data they need' and 'Surely people can do basic navigation'." (Stakeholder)

Stakeholders expressed a desire to learn from other regions leading the way on digital inclusion. Key ingredients for success in regions like Greater Manchester, Liverpool City Region, Greater London, and the West Midlands include: personal interest and leadership from the elected Mayor; a dedicated digital inclusion team within the combined authority to drive cross-sector coordination, stakeholder **communication, awareness raising, finding resources, and advocacy, and a branded identity and strategy** – co-created with regional and local stakeholders.

Importantly, there is also opportunity for the Combined Authority to 'lead by example'. For instance, ensuring that the Combined Authority website and online services are **designed in ways that work for people with low digital access, skills, and confidence**, and/or in developing an IT equipment reuse strategy that builds in device donation, refurbishment, and distribution to people who are digitally excluded; and/or in undertaking a digital skills audit for Combined Authority staff.

Potential opportunities for the West of England Mayoral Combined Authority

- Co-produce regional digital inclusion goals and priorities – building on the discovery insights, continuing to engage stakeholders
- Lead by example, e.g. improve the design of Combined Authority online services **so they work better for people with limited digital access, skills, and confidence**
- Raise awareness of digital exclusion and inclusion in the region to secure buy-in **from other local and regional stakeholders (Two Gorges)**
- **Raise awareness of nationally available resources which could benefit more people locally (e.g. 'social tariffs' for broadband, National Databank)**

Funding – fostering a sustainable funding environment

Most stakeholders recognised the current financial constraints. This necessitates finding ways to embed digital inclusion in existing, broader programmes such as economic inclusion, addressing inequality, and supporting employment readiness.

The West of England Mayoral Combined Authority could encourage more strategic, collaborative use of existing budgets (such as Adult Skills Fund, UK **Shared Prosperity Funds**), or foster the development of collaborative funding applications. This approach could mitigate the risks of new funding leading to more fragmentation of public and voluntary sector provision.

“The combined authority is in a good place to facilitate the right behaviours. [They can] expect when people bid for funding to demonstrate that they are going to work with other providers and are working in the interests of their participants.” (Stakeholder)

“There is a lack of visibility or understanding of what’s out there. So, when you do get new funding, you get a flurry of activity that might duplicate rather than address gaps.” (Provider)

Finding out about funding opportunities, getting support with bid-writing, and being supported to develop collaborative bids were ideas from stakeholders that could foster a more strategic, sustainable funding environment. The Combined Authority could explore these opportunities with regional charitable trusts (e.g. Quartet **Community Foundation**) and third sector infrastructure organisations (e.g. **3SG** and **VOSCUR**).

Harnessing Social Value in public procurement is another route that is being used to secure support for digital inclusion, such as affordable broadband connectivity, provision of devices and volunteer time to help with digital skills training. Work is underway at a national level, led by FutureDotNow, to develop a clearer framework for using Social Value to promote basic digital skills training in the workforce.

Potential opportunities for the West of England Mayoral Combined Authority

- Explore ways to use existing funding to deliver more digital inclusion support in **communities (e.g. Adult Skills Fund, UK Shared Prosperity Fund)**
- Explore opportunities to increase digital inclusion support by leveraging funding with local or regional charitable trusts
- **Consider using Social Value (in public procurement) to secure support for digital inclusion (e.g. for affordable access, and basic digital skills support)**

Partnership – encouraging collaboration and effective use of resources

There are several examples of productive partnerships, which come into their own when community meets digital. The Bath Digital Divide Collective, with Tech4Good South West, Bath Bridge and several other organisations, is a great example. More broadly, there is a sense that digital inclusion provision is fragmented or “patchy”, driven by budget constraints and differing priorities between local authorities. Collaborative efforts are also hampered by boundaries which can get in the way of pooling resources to match provision to local needs (for example, **across healthcare providers and local government**).

“I haven’t seen evidence of any sort of regional collaboration.” (Stakeholder)

Stakeholders said they were keen to learn about what others are doing, what’s happening in other parts of the region, and nationally. Collaboration between local authorities, healthcare providers, voluntary sector, and community groups could streamline efforts and improve access to resources and support.

“There are good news stories from people around the UK, but we haven’t necessarily got anything that relates to local [provision]... we’re trying to come up with some good news stories from people locally like, you know, ‘I generally feel more digitally included because I’ve been able to access this local support, which I didn’t necessarily know was available before’.” (Provider)

There is also scope to harness the expertise, assets, and financial support of larger employers with a strong local or regional footprint – ‘anchor institutions’ such as universities, colleges, NHS Foundation Trusts, and local businesses.

Potential opportunities for the West of England Mayoral Combined Authority

- Establish a **West of England digital inclusion network or taskforce**, open to a wide range of stakeholders, to foster collaboration and action
- Facilitate the active **sharing of knowledge, best practice, resources and opportunities** across providers of digital inclusion support. (This is seen as **crucial for spreading successful models and preventing duplication**).
- Leverage the potential contribution of regional ‘anchor institutions’ – such as NHS Foundation Trusts, universities, local businesses

Evidence – building and using data to drive meaningful change

Accurate, up-to-date statistical data on digital exclusion and digital inclusion is a challenge across the whole country. As described above, there are a number of valuable national digital inclusion datasets, but none are large enough to enable granular analysis of digital exclusion and inclusion in local areas, and over time.

Some stakeholders highlighted that they would benefit from better access to current data to understand the digital divide across the region. Linked to this, they highlighted a need for greater consistency in the sorts of questions that are asked when collecting data, and how these questions are asked, in order to build better data and understanding of needs. This suggests a role for the Combined Authority in finding creative, resourceful ways to embed questions about digital access, skills, and support into other surveys of residents, businesses, and specific population groups (directly, and through influencing data collection led by others, such as local authorities or major service providers working with target populations).

Already, the data-based maps generated through this discovery project provide a valuable opportunity for the Combined Authority and others to dive deeper into specific localities, and build a clearer picture of needs, provision, and gaps in support.

“There’s a real opportunity here to join with the community groups in sharing intelligence to address the gaps, to understand where those gaps are coming from.... they really know what’s happening on the ground.” (Stakeholder)

Sharing knowledge about who is doing what (locally, regionally, and in other parts of the country) and sharing examples of good practice also emerged as priorities for a potential West of England digital inclusion network or taskforce.

Potential opportunities for the West of England Mayoral Combined Authority

- Lead by example and encourage others to use a consistent methodology to collect data on digital inclusion. For example, a standardised set of questions could be used by all three local authorities in resident surveys. (There is work underway nationally to develop a core set of metrics).
- Use the data and maps from the discovery phase for deep dives into areas which appear less well served by existing provision
- Identify opportunities to ask questions related to digital access, skills, use, and support through other surveys led by the Combined Authority or appropriate partners

Ecosystem – identifying and investing in pathways to impact

There was a shared sense that, while funding is important, creating a supportive infrastructure that fosters learning, trust, and access to resources can have a long-term, sustainable impact. For example, many initiatives, such as IT recycling and refurbishment, exist but are fragmented. Stakeholders were keen to see more regional coordination and leadership to unify these efforts.

There was an emphasis on the importance of community-led initiatives, which **are rooted in local context and responsive to the specific needs of different areas. Participants identified that the Combined Authority has an important role to play in widening the ecosystem by securing the support and buy-in of wider stakeholders, including ‘anchor institutions’ such as businesses, hospitals and other healthcare providers, universities, colleges, and local authorities.**

“I think there’s a need to help partners realise their space in the ecosystem and how they fit together, and that by working together they will all benefit, and our residents will benefit...” (Stakeholder)

“Wouldn’t it be great if we could just get everyone in a room ... and talk about ways in which we can support people? Because there’s already support available, we just need to pull it all together.” (Provider)

“It’s about having [all key stakeholders] involved... universities, community organisations, businesses – and mapping out who can play what role in achieving those solutions.” (Stakeholder)

Potential opportunities for the West of England Mayoral Combined Authority

- Challenge existing boundaries to secure digital inclusion provision to match **need and key services (eg. across health and local government)**
- Develop a ‘Growth Hub’ type model for digital inclusion providers to build their digital capabilities
- Use the creative and tech strengths of the region to improve design of digital services for better accessibility and inclusivity
- Invest in capacity in the VCFSE sector as trusted providers of digital inclusion provision to ‘hard to reach’ groups, focused on new needs (e.g. emerging technologies) **as well as core needs (eg. bid writing support)**

Conclusion

The West of England Digital Plan³⁰, published by the West of England Mayoral Combined Authority in 2023, recognises that people who are digitally excluded are “more likely to experience poor outcomes that affect quality of life”. The plan sets clear commitments:

- To reduce digital exclusion, focussing on those most affected
- To improve digital skills at all levels so that: residents have the foundation skills they need to get online; the digital skills for life; the digital skills for work; and residents **and businesses can benefit from advanced digital skills.**

While the West of England compares well against many parts of the country, **there is still a significant digital exclusion challenge.** Analysis of Ofcom data estimates that over 14% of adults in the region are non-users or very limited internet users. This equates to over 100,000 residents. Digital exclusion is deeply intertwined with other forms of disadvantage, including poverty, unemployment, lack of education, life-impacting conditions, and living in areas of deprivation. There is also a clear link between older age and being **offline. This means there will be digitally excluded households in more affluent areas (like Bath), as well as in areas of greater deprivation (like South Bristol).**

People with lived experience of digital exclusion, and stakeholders from **across sectors all identified challenges** facing digitally excluded groups, and facing those providing support. These

included: affordability, low awareness of what is available, frustrations with poorly designed online services, **specific gaps in skills provision, short term funding, and low digital capability in some organisations** – including with a role to play in digital inclusion.

Positively, the project also revealed a strong appetite among a wide range of stakeholders to work together, with leadership from the combined authority, to tackle the digital divide. There is a solid foundation of existing provision (nearly 200 providers offering **some form of support**), **with scope to** make better use of available resources, and several positive examples of good practice and place-based partnership working. Establishing a West of England digital inclusion network or taskforce – to convene a range of stakeholders to share knowledge, best practice, co-create an action plan, and harness respective strengths – could be a timely next step in the region’s digital inclusion journey.

³⁰ West of England Combined Authority (2023), [West of England Digital Plan](#)

Annex and Acknowledgements



Annex 1: Prioritisation of opportunities

The table below is based on a diamond-ranking exercise carried out as part of an in-person stakeholder event on 28th November 2024, involving nearly 40 people from across the region. The relative priority of each opportunity discussed **is indicative, as stakeholders noted they were difficult to rank due to their interrelated nature.** Insights from the discussion were used (alongside insights from the stakeholder interviews and workshops) to inform the recommendations.

1	Partnership	Establish a West of England digital inclusion network or taskforce, open to a wide range of stakeholders, to foster collaboration
2	Funding	Explore ways to use existing regional and local funding to deliver more digital inclusion support in communities
3	Leadership	Co-produce regional digital inclusion goals and priorities
4	Partnership	Leverage the potential contribution of regional ‘anchor institutions’ – such as NHS Foundation Trusts, universities, local businesses
5	Leadership	Raise awareness of nationally available resources which could be used to benefit more people in the region
6	Leadership	Raise awareness of digital exclusion and inclusion to secure buy-in from local and regional stakeholders
7	Leadership	Lead by example in improving the design of Combined Authority and local authority online services
8	Ecosystem	Tap into the creative and tech strengths of the region to improve the accessibility and inclusivity of (public sector) digital services
9	Ecosystem	Invest in digital capabilities of skills provider organisations (e.g. by developing a ‘Growth Hub’ type model for digital inclusion providers)
10	Funding	Explore opportunities to leverage funding together with charitable trusts and foundations with a stake in the West of England region
11	Partnership	Facilitate the active sharing of knowledge, best practice, resources and opportunities across providers of digital inclusion support
12	Evidence	Use the data insights from the discovery phase for deep dives into those areas which appear less well served by existing provision
13	Ecosystem	Invest in capacity within the VCFSE sector as trusted local or regional providers of digital inclusion support to priority target groups
14	Funding	Tap into work underway nationally on using Social Value (in public procurement) for affordable access, and basic digital skills support
15	Evidence	Encourage stakeholders to use a consistent methodology and set of questions to collect data on digital inclusion (e.g. resident surveys)
16	Ecosystem	Combined Authority to challenge existing boundaries and secure digital inclusion provision to match need and key services (health)
17	Evidence	Tap into work in progress nationally on developing a core set of metrics and survey questions for digital exclusion and inclusion

Annex 2: Selected resources on digital inclusion

This section provides a list with links to useful resources relation to digital inclusion. This list of resources was not developed through a systematic review and is not exhaustive or comprehensive.

Datasets

Department for Culture, Media and Sport (2024), [Participation Survey 2023/2024](#) (note: online survey)

Greater Manchester Combined Authority, [Digital Exclusion Risk Index](#)

Lloyds Banking Group (2024), [Consumer Digital Index 2024](#)

Nominet (2023), [Digital Youth Index](#)

Ofcom (2024), [Online Nation 2024](#)

Ofcom (2024), [Technology Tracker 2024](#)

Ofcom (2024), [Affordability of communications services \(series of research reports, updated\)](#)

Yates, S et al (2024), [Minimum Digital Living Standard for Households with Children](#)

Resources on digital exclusion and inclusion

Department for Work and Pensions (2024), [Digital skills, channel preferences and access needs: DWP customers](#)

Department for Work and Pensions (2024), [Digital skills, channel preferences and access needs: PIP customers](#)

Good Things Foundation (2022) [The economic impact of digital inclusion in the UK](#)

Good Things Foundation (2024), [Digital Nation 2024](#)

Good Things Foundation (2024), [Digital inclusion: What the main UK datasets tell us](#)

Good Things Foundation with Connected by Change (2024), [Partnership working to promote digital inclusion for health: Local authority perspectives on working with NHS primary care](#)

House of Lords Communications and Digital Committee (2024), [Digital exclusion in the UK](#)

Local Government Association (2023), [The role of councils in tackling digital exclusion](#)

NHS England (2023), [Inclusive Digital Healthcare: A Framework for NHS Action on Digital Inclusion](#)

Walker, T. (2022) [Tackling digital poverty in rural communities](#)

Resources relevant to protected characteristics

Age

Age UK (2024), [Facts and figures about digital inclusion and older people](#)

Barnardo's (2024), [Changing childhoods, changing lives](#)

Good Things Foundation (2022), [Doing digital in later life: A practical guide; Supporting evidence](#)

Older People's Commissioner for Wales (2024), [Access Denied: Older people's experiences of digital exclusion in Wales](#)

Reengage (2022), [Online in your 80s: Lifeline or waste of time?](#)

The Prince's Trust (2024), [Decoding The Digital Skills Gap](#)

Disability and long-term conditions

AbilityNet, [Resources – including guides on Website Accessible Guidelines](#)

Digital Communities Wales (2021), [Good practice guide to digital for care homes](#)

Thrive by Design (2022), [Inclusive digital transformation in mental health: Knowledge into action](#)

Race and ethnicity

British Red Cross (2023), [Offline and Isolated: How digital exclusion impacts access to healthcare for people seeking asylum in England](#)

Friends, Families and Travellers (2019), [Digital exclusion in Gypsy and Traveller communities in the United Kingdom](#)

Good Things Foundation (2020), [Supporting digital inclusion of adults with low English language skills](#)

Looked after and accommodated children and young people

Catch22 (2021), [Digital disadvantage: Barriers to digital skills and access](#)

Carers (unpaid family members)

Carers UK (2023), [Carers' assessments: developments, digital, diversity, co-production and good practice](#)

Carers UK (2024), [State of Caring 2024](#)

Hospice UK (2023), [Promoting digital inclusion in palliative and end of life care](#)

Parent Zone (2021), [Digital poverty: what still needs to happen](#)

People on low incomes and/or living in areas of deprivation

Allmann, K 2022, [UK digital poverty evidence review](#) (**Digital Poverty Alliance**)

Dixon, K 2022, [Scaling solutions to data poverty in the UK](#) (**Data Poverty Lab Fellowship**)

Faith, Band Hernandez, F (2022), [Digital poverty in the UK](#) (**IDS Policy Briefing**)

Good Things Foundation (2022), [Towards solving data poverty](#)

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3SG BaNES

Age UK Bath and North East Somerset

Age UK South Gloucestershire

Bath and North East Somerset Council

Bath Bridge CIC

Bath Mind

Be Astute

Borderlands

Bristol City Council

Bristol Digital Futures Institute

BSW Primary and Community Care Training Hub

Bristol Refugee and Asylum Seeker **Partnership (ERASP)**

Bristol, North Somerset and South Gloucestershire **(BNSSG) Integrated Care Board**

Clarke Willmot

Clean Slate

DigiLocal

Digital Divide Collective

Eastside Community Trust

Feeding Bristol

Hartcliffe & Withywood Ventures

JobnetworkBristol

Knowle West Media Centre

Libraries Connected

Mayden

Meshii

North Bristol Advice Centre

OneCare

Quartet Community Foundation

Royal United Hospitals Bath NHS Foundation Trust

Seetec Pluss

Skills Connect

South Gloucestershire Council

Southside Family Project

Tech4Good South West

The American Museum Bath

Transform UK

University of Bristol

UWE Bristol

Voscur

West of England Centre for Inclusive **Living (WECL)**

West of England Growth Hub

YTKO



Good Things
Foundation



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LIVERPOOL



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PLACES