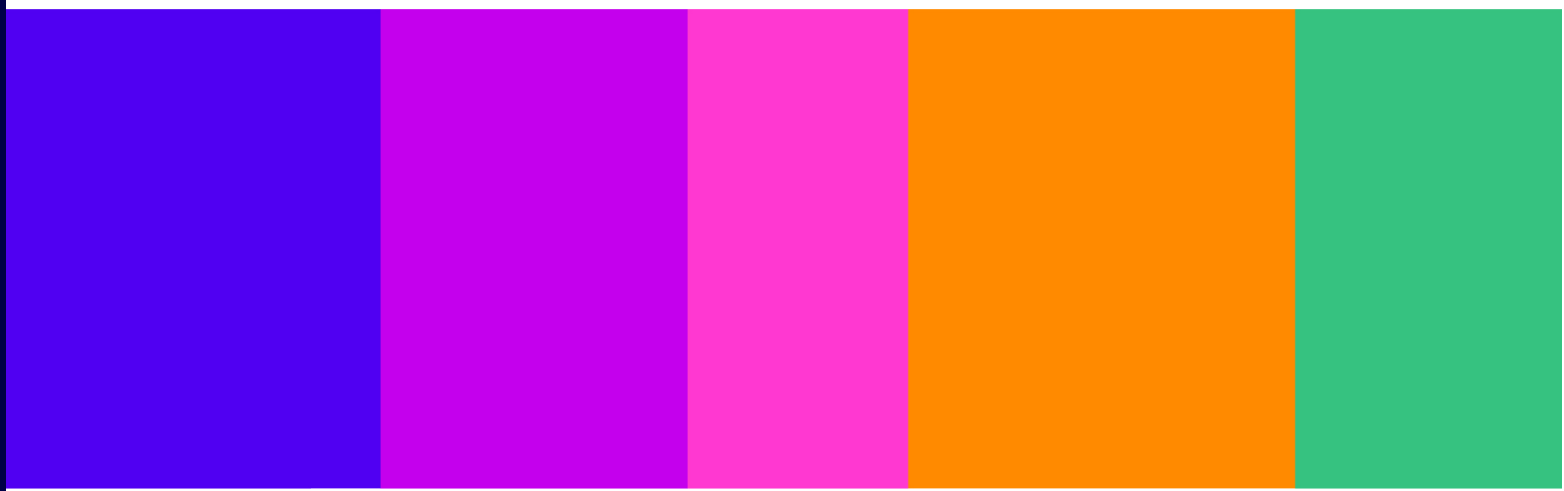# Exploring Digital Disadvantage

Ofcom Response to Research Findings

Report

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Our Response

Introduction

At Ofcom, our mission is to make communications work for everyone. As the regulator for the communications services that people in the UK use and rely on each day, we aim to ensure that people get the best from their broadband, home phones, mobile services, TV and radio, as well as making sure that online services meet their duties to protect their users. In doing this, we have a duty to consider the needs, opinions, and interests of consumers and citizens, including people who may be in vulnerable circumstances.

The internet underpins communication in modern society, and the services that people use and rely on every day are increasingly moving online – a shift hastened by the COVID-19 pandemic. Over the past five years, we have witnessed significant changes that are likely to persist. One notable example is the rapid advancement of generative artificial intelligence, which highlights the importance of updating our understanding of the evolving needs and experiences of those who may face disadvantages when using the internet and navigating the digital world.

We are observing a significant shift towards online service delivery in the sectors we regulate, mirroring society as a whole. A prime example is the future of TV distribution, where audiences are spending more of their time watching content online. This shift may leave some audiences, who rely on Digital Terrestrial Television to access services, without adequate support – especially if changing audience habits and rising costs force a 'tipping point' where more services become online-only. In our report to the Government[1] last year, we committed to further investigating the barriers citizens face in getting online and fully utilising digital services.

We are publishing new research that contributes to improved understanding of the barriers to getting online and digital engagement. First is a quantitative analysis of the demographic profile of those without access to broadband at home, which is published alongside this document. The second is an in-depth qualitative research study into digital disadvantage, which this document focusses on.

Speaking to 70 people from across the UK, we explored what challenges people faced when they went online, as well as people's reasons for being offline. As discussed below, the research finds that these barriers and negative experiences impact on their ability to access the internet, the quality of their digital engagement, or their ability to fully benefit from the opportunities provided by high-speed internet.

We adopt the term 'Digital disadvantage' in this research and use it as a broad term to describe the experiences of people who face barriers or negative experiences when using digital communications and services. This document summarises the background to and results from our qualitative research and outlines what steps Ofcom is taking in relation to the research findings.

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[1] Ofcom Report: Future of TV distribution

Who might face digital disadvantage?

Prior research suggests that there are various population groups who could face digital disadvantage currently, or in the future:

- The number of people without access to the internet has decreased from 13% to 5% in the last five years.[2] Despite being a small proportion of the UK population, this 5% nevertheless represents over two and a half million people who may face greater negative impacts over time from being offline in an increasingly digital society.

- A significant number of people in the UK are online but using legacy technologies in some capacity. For example, around 2.1 million people are still using devices reliant on 2G or 3G connectivity,[3] resulting in slower data speeds and reduced coverage as mobile providers phase out their 2G and 3G networks.

- Around 27% of people in the UK are classified as narrow internet users, who conduct only a small number of tasks online despite having connectivity.[4] Our research suggests that these users can be, in attitude, cautious or resistant to making use of a wider range of online services and functions.

- 18% of internet users go online exclusively via a smartphone, and 27% of these users say they feel disadvantaged as a result. Smartphone only users are more likely to be women, and individuals in DE socio-economic groups, suggesting that affordability may contribute to reasons for only going online via a smartphone.[5]

- 8% of internet users do not consider themselves confident online. Those in this category are more likely to be aged 55+, with impacting or limiting conditions and smartphone-only users.[6] This lack of confidence can lead to people feeling unsure/unsafe online, as well as potentially missing out on opportunities for productivity, connection and entertainment.

- Around 24% (16 million) of people in the UK population are people with disabilities.[7] Research shows that individuals with disabilities continue to face more challenges than others online and those with a physical disability are least likely to be able to complete the fundamental tasks to engage with a digital world.[8]

- Online harms can be disproportionately experienced by some groups. Research from 2024 shows that disabled people (76%) are more likely than non-disabled internet users (64%) to experience online harms. People in a range of minority ethnic groups are more likely to encounter hateful or abusive content online than the rest of the population; 48% of people from minority ethnic groups said they encountered such content targeting ethnicity in the 4 weeks prior to the research. Women are five times more likely to be the victims of intimate image abuse.[9]

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[2] Ofcom, Tech Tracker 2024.
[3] Ofcom, Connected Nations Report 2024
[4] Ofcom, Adults' Media Use and Attitudes Report 2024
[5] Ofcom, Adults' Media Literacy Tracker 2024
[6] Ofcom Adults' Media Use and Attitudes Interactive Report 2024
[7] House of Commons Research Briefing (October 2024): UK Disability Statistics: Prevalence and Life Experience
[8] Lloyds Bank, 2024 Consumer Digital Index
[9] Ofcom, Online Experiences Tracker 2024.

Which groups did we focus on?

Coming into this work, we recognised that:

1. Certain groups can be under-represented in research on digital experiences, such as those in insecure housing, with limited English proficiency, and lower internet users, including non-users. These groups are at risk of having poor experiences with essential services if offline options are unavailable or inaccessible.

2. Under-represented groups face wider challenges in society, varying from economic inequality to challenges accessing healthcare, meaning that if people in these groups are underserved online it can compound issues they encounter in daily life.[10]

3. While it is essential to monitor use of the internet and digital communications through robust quantitative metrics, it is also important to use qualitative research methods to continue exploring the nuances and diversity of behaviours relating to digital life. This helps to both challenge and inform our approach to quantitative research, which is particularly important at a time when how people use communication services has become more fragmented.

With these considerations in mind, we commissioned Blue Marble to carry out a qualitative study into digital disadvantage, to deepen our understanding of the experiences and challenges people face when using digital communications and services. The research focused on some of the groups of people who may face unique forms of digital disadvantage linked to their identity or circumstances. These groups include, but aren't limited to, disabled people, people in insecure housing, people from minority ethnic groups, people with limited English proficiency, and people with lower internet use.

The resulting report provides qualitative evidence about digital disadvantage, highlighting the challenges faced by the individuals interviewed, their attitudes towards the internet, and its impact on their lives. It explores the experiences of different groups whilst acknowledging the added complexity of intersectionality in people's identities, as well as cross-cutting issues that feature in digital experiences including weak connectivity, limited digital skills or confidence, and experience of online harm.

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[10] Examples of these challenges are detailed in the Exploring Digital Disadvantage report.

What are the key findings from the Research?

Most participants described experiencing some degree of challenge when participating in online life. We heard about issues with:

- **Weak connectivity**. This included people who believed they had limited broadband options in their home or area, as well as those who had 'not-spots' in their home, low-speed broadband, or who used only mobile data.

- **The cost of going online**. For example, people who only had mobile data to go online, but felt this didn't meet their needs, as well as people who thought having faster broadband or devices that better met their needs would be too expensive for them.

- **Online harm**. For example, participants who had been victims of financial fraud, 'catfishing' and whose social media accounts had been hacked. There were also many who talked about witnessing hateful posts online on social media.

- **Devices, software, apps and websites that were not meeting people's access needs**. For personal devices and software, concerns about cost and low knowledge about alternative options limited people's ability to improve their experiences.

- **People who felt unconfident online and/or that they lacked digital skills**. People talked about struggling to complete tasks or avoiding doing tasks online because of concerns that they wouldn't be able to complete them. There were also people who lacked confidence going online due to their trust or attitude towards the internet and/or technology.

These challenges were described as leading to a wide range of psychological, logistical, and societal impacts. As a result of difficulties faced when going online, people could experience mental health issues such as stress and anxiety, miss out on work opportunities, or withdraw from using social media.

Our research has also reinforced previous research suggesting the challenges people face whilst using digital services can be linked to their identity or circumstances. For example:

- Some disabled people described how going online can have a negative impact on their health.
- People in insecure housing described how their housing situations can make it harder to access the internet.
- Some people from minority ethnic groups described experiences of racism online.
- People with limited English proficiency described their reliance on others to participate in aspects of online life or use key digital services.
- Lower internet users - meaning the least frequent internet users in the research - included people who described a lack of money or support to help them do more online.

Our research has also identified a number of challenges that are relevant to people's engagement with digital services in future. For example:

- For some people, the prospect of an increasingly digital society can evoke fear and anxiety. Negative experiences, such as poor service provision, scams, and online hate, exacerbate these feelings and erode online confidence. Consequently, some individuals actively choose to opt out of digital services like social media or minimise their internet use in other ways, despite the potential negative impacts of such decisions.

- To participate online, many people relied on various workarounds and proxy use. This included using other people's technology or asking others to perform online tasks for them when they lacked confidence. A few people identified as non-internet users, but it became clear they were

not entirely offline, as they received help from family members who assisted with online tasks and, in some cases, had set up home connectivity for them.

- People who face unique challenges online do not always perceive themselves as digitally disadvantaged and often believe others are at higher risk of being 'left behind.' While the disadvantages of absolute digital exclusion were clear to participants, they often had a limited awareness of the internet's full benefits, resulting in a lack of desire for increased internet use, which in turn reduced the potential exposure to those benefits.

The research shows there was a great deal of diversity in people's relationships with and attitudes towards the internet, which impacted whether they considered the challenges they faced to be significant. A range of factors played a role in determining whether participants felt disadvantaged online, including: the perceived severity of issues experienced, the availability of workarounds, whether or not people had a support network of friends or relatives, and the value participants personally attached to being online. While some were frustrated about not being able to do more online, others were relatively comfortable with their existing relationship with the internet.

Next Steps

This research provides invaluable qualitative insights into experiences of people facing digital disadvantage. It illustrates that there are challenges faced by those in certain demographic groups which impact their ability and willingness to fully benefit from digital communications and services, even after they have crossed the threshold to get online.

The findings from this research will be important for informing:

- our understanding of the digital divide which could persist in the years ahead, despite higher overall levels of broadband adoption,
- our work on media literacy and on user empowerment,
- our work to support digital transitions from legacy technologies,
- our work on the future of TV distribution, and
- our inclusive research programme.

The Evolving Digital Divide

We have carried out a statistical analysis of the quantitative data from our Technology Tracker survey to unlock new insights about the characteristics of UK adults who do not use the internet at home (non-internet users), and those who have very limited internet connectivity. The findings of this work are detailed in our [publication](#) and provide further insight on some demographic groups who may be digitally disadvantaged specifically due to barriers to gaining or maintaining a suitable internet connection.

This work illustrates the need to further expand and challenge our understanding of people experiencing different kinds of digital exclusion. We are also currently overhauling our mobile coverage web-checker which helps consumers understand what mobile coverage is like in their area. This will improve accuracy and transparency and should drive stronger incentives amongst mobile providers to deliver better connectivity, which would in turn improve outcomes for individuals and households who rely on data for connectivity and/or are smartphone-only users. We will also continue to monitor whether providers are treating customers in vulnerable circumstances fairly including monitoring affordability indicators for communications services.

Media Literacy and User Empowerment

Our media literacy programme has piloted a number of [initiatives to improve digital skills among communities](#) to establish and amplify 'what works', alongside [data gathering](#) about a variety of digital experiences. The programme commits to embedding the skills needed for life online into existing digital inclusion work across the UK, for example by working with local authorities. In Birmingham, Glasgow, Rhondda Cynon Taf and across Northern Ireland, we are taking a place-based approach to embedding media literacy in the existing digital inclusion offer. Local expert steering groups are shaping the work to ensure it is relevant to the local context and meets the needs of the communities. We will be sharing insights and evaluation of this work to help inform practice for local communities across the UK.

We will be doing more in this area over the next three years, as set out in our [three-year media literacy strategy](#). We will also be publishing a Statement of Recommendations later in the year, which will make recommendations relevant to creating empowering digital services for users and will consider the findings of this research as it does so.

We will also be doing more as we implement the Online Safety Act and assess platforms' compliance with their obligations under the Act. In addition to our work relating to the protection of children and action against illegal harms, in 2026, we will publish proposed codes of practice covering tools for users to have more control over what content they see online.

Supporting Digital Transitions

In this rapidly evolving digital landscape, we recognise the intricate interdependence between transitioning from older applications, technologies, and infrastructure to modern, efficient digital ones, and ensuring that no part of the population is left behind or digitally excluded.

This research has highlighted the potential for people to be left behind and the various ways digital disadvantage can manifest, including:

- Self-exclusion from online connectivity: Some people opt out of connectivity altogether.
- Self-exclusion from services: Some individuals choose not to engage with certain digital services due to a perceived lack of digital skills or confidence.
- Settling for sub-par online services: People may accept services that don't fully meet their needs due to cost, device design, service availability, location, or living situation.
- Acceptance of poorer experiences: Some individuals may continue to use digital services despite experiencing online harms, which can impact their physical or mental health.

Digital transitions offer opportunities to improve digital inclusion, drive innovation, foster growth, and enhance cybersecurity. However, when done badly, they can also make essential services inaccessible, particularly for the population groups highlighted in this research. The insights gained from this research provide a platform for better understanding and addressing the challenges posed by legacy-to-digital transitions, and how we can support the industry in ensuring positive outcomes for all UK citizens.

In our recently published plan of work, we have committed to focusing on this area over the next year. We will continue to collaborate with industry and government to ensure that customers, particularly those who are vulnerable, are supported and protected through these transitions, and will consider how digital transitions across the sectors Ofcom regulates can contribute to the best outcomes for citizens, industry, and economic growth.

The Future of TV Distribution

We anticipate significant changes in regulated communications services over the next few years, necessitating support for both industry and citizens during these transitions. One specific area of focus in terms of supporting digital transitions is the future of TV distribution. As highlighted in our Future of TV Distribution report to the government: "TV distribution is changing rapidly again, as most audiences now enjoy some form of Internet Protocol Television (IPTV). Both industry and audiences expect this shift to online TV to continue, creating a range of challenges and opportunities for viewers." This transition could have significant implications for those who are entirely offline and those who may be digitally disadvantaged.

We recognise the importance of closely monitoring these impacts and will be doing so in the coming years. Additionally, we will continue to support the government with its ongoing work on the Future of TV Distribution, providing technical advice on various matters.

We have recently updated our accessibility best practice guidelines which give advice to broadcasters and video-on-demand providers on making accessibility features which are high-quality and easy to use. In implementing the Media Act 2024, we will be introducing accessibility requirements for certain video on demand online services, and regulated connected TV platforms, to reduce the barriers to their use for disabled people. Our programme of work around diversity in broadcasting (including annual monitoring and reporting) aims to promote a media workforce that represents and serves the whole of the UK.

Our Inclusive Research Programme

In line with our duties, we are required to understand consumer behaviour and attitudes across regulated sectors, especially those at risk of disadvantage, discrimination, or marginalisation. The digital disadvantage research is one of the projects conducted as part of our Inclusive Research programme. This work covers all aspects of diversity and inclusion in market research, from design and analysis to reporting and dissemination, and will enhance our wider market research approach.

The research conducted by Blue Marble has improved our understanding of the needs of those who can face digital disadvantage, and the findings will be important for continually challenging assumptions about people and society. We are conscious of the fact that millions of people, including those in more vulnerable circumstances, have recently gone online for the first time in the last five years. In light of this research, we recognise the importance of continuing to monitor and track the experiences of this newly online cohort, to ensure that they feel communications are working for them.