Digital Connectivity: Focus on Levenmouth

Fife Council Research **March 2021**

Summary

Over the last year, while people have been encouraged to stay at home to stay safe, technology has become a necessity for keeping connected, working remotely and accessing vital information. While levels of internet use continue to grow, people can still be digitally excluded because they lack the skills to be able to confidently and safely navigate the digital world.

This paper outlines the benefits of digital skills and public wifi to local economic recovery. Levenmouth Area does not appear to be significantly different from Fife in relation to internet use and digital skills.

Introduction

In an increasingly digital age, those who are not engaging effectively with the digital world are at risk of being left behind. Technological change means that digital skills are increasingly important for connecting with others, accessing information and services and meeting the changing demands of the workplace and economy.

This is leading to a digital divide between those who have access to information and communications technology and those who do not, giving rise to inequalities in access to opportunities, knowledge, services and goods. Over the last year, while people are being encouraged to stay at home to stay safe, technology has become a necessity for keeping connected, working remotely and accessing vital information.

Overview of Internet Use

Of all households in Great Britain, 93% had access to the internet in 2019 (ONS, Opinions and Lifestyle Survey). This was a rise of 3 percentage points from 2018 and an increase of 23 percentage points in the last decade.

Fixed broadband has continued to be the most popular type of household internet connection since first measured in 2015, with 98% of households with internet access having this type of connection in 2019. However, many households that connect through fixed broadband also connect using mobile broadband while at home, with 64% of households connecting via mobile broadband in 2019. Among all adults, 84% had used the internet “on the go” in 2019, using a mobile phone, smartphone, laptop, tablet or handheld device.

While almost all households had access to the internet, 7% did not. Most of these did not have access to the internet as they felt that they did not need it, with 61% reporting as such in 2019. Lack of skills and privacy or security concerns were also factors, at 34% and 33% respectively.

Digital Exclusion

The key barriers associated with digital exclusion are understood as:

- The basic/essential digital skills gap;
- A lack of access to a connection and/or device;
- The motivational barriers preventing people from engaging

Motivation is one of the key barriers to doing more online – over one-third of those offline say the Internet 'doesn't interest me', and other reasons given include: 'the support I need is not available to me', 'it's too complicated' and 'the cost of going online is too much for me'. 48% of the digitally excluded state that 'nothing' could motivate them to get online. Men are much more likely to have motivational barriers to getting online.

There is still the potential that the cost of Internet access is a barrier. Monthly broadband cost is estimated at being between £30-35 and of the offline population, more than half (53%) may not have the disposable income to afford an average monthly broadband bill.

Here are some headlines about non-users in general:

- 12% of UK adults do not go online currently (non-users) (Ofcom, 2018)
- This equates to approximately 6.3m people (applied to ONS' Mid year population estimate, 2018)
- Non-users are now increasingly synonymous with those saying "the internet is not for me" or "it's not safe", rather than more tangible barriers such as a lack of skills or available equipment.

The six most reliable indicators of whether someone is a non-user of the internet are:

- The age at which people leave full-time education
- The presence of children in their home
- Their level of confidence with reading and writing - i.e. general literacy
- Their income
- Their social grade (according to the NRS classification)
- Their age

Age remains the biggest indicator of whether an individual is online. Age itself is not necessarily a predictor of non-use. Many of the other indicators correspond with age but are more reliable predictors on their own.

Digital Skills

It is important to recognise that digital skills are as important as internet usage. Users of the internet can still be digitally excluded because they lack the skills to be able to confidently and safely navigate the digital world.

According to the Lloyds Bank Consumer Digital Index Report 2020, an estimated 9 million (16%) people in the UK are unable to use the Internet and their device by themselves. Around 2.7 million (5%) people can access the Internet but lack the ability to use it to its full advantage; in total, an estimated 11.7 million (22%) people in the UK are without the skills needed for everyday life.

The Tech Partnership Basic Digital Skills framework describes five basic digital skills that can be used to measure digital inclusion and the activities someone should be able to do to demonstrate each skill. These are:

1. **managing information**: using a search engine to look for information, finding a website visited before or downloading or saving a photo found online.
2. **communicating**: sending a personal message via email or online messaging service or carefully making comments and sharing information online.
3. **transacting**: buying items or services from a website or buying and installing apps on a device.
4. **problem solving**: verifying sources of information online or solving a problem with a device or digital service using online help.
5. **creating**: completing online application forms including personal details or creating something new from existing online images, music or video.

To be considered to have a digital skill, respondents need to be able to do one of the activities listed under it.

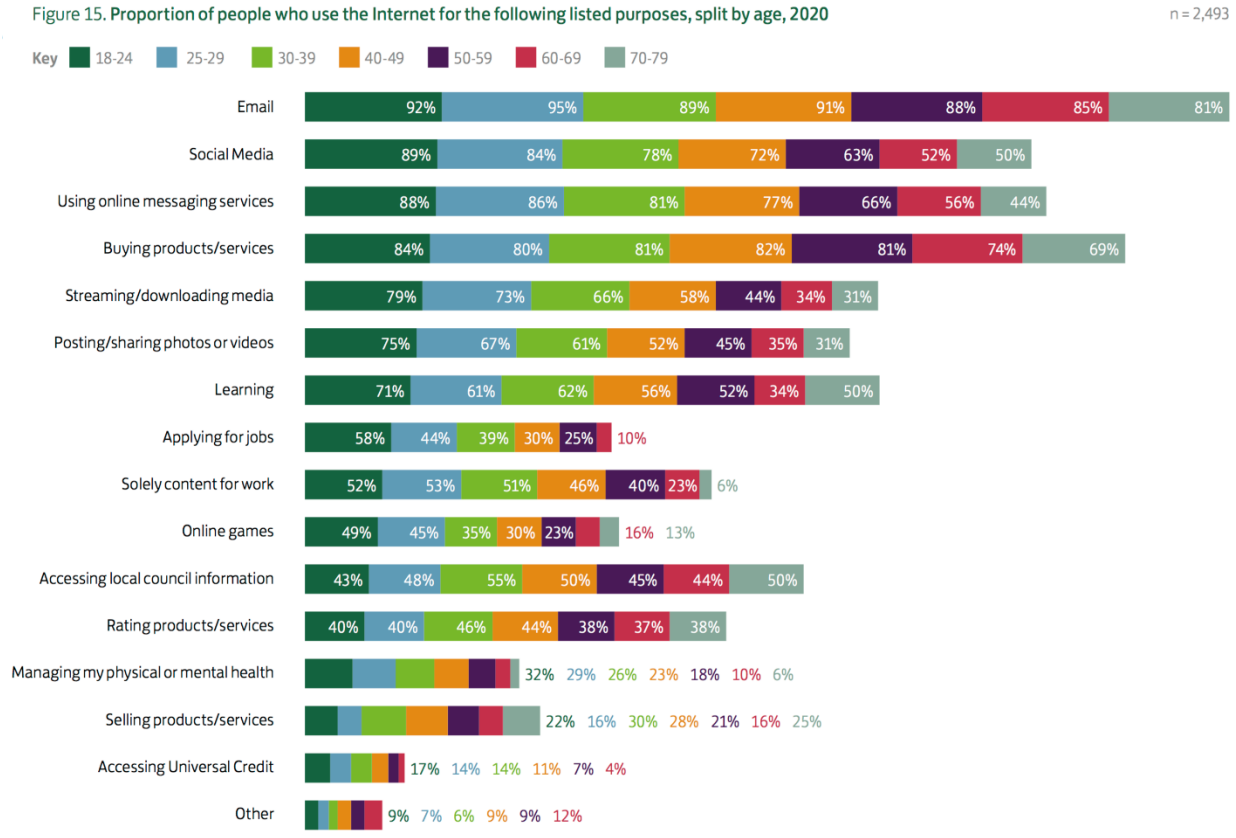

Figure 1 – Proportion of people who use the internet for the following listed purpose, by age (Source: Lloyds Bank Consumer Digital Index Report 2020)

Internet Use and Digital Skills in Levenmouth Area

Local information on internet use and digital skills is available from Fife People's Panel Survey 30 on Communications (as at 2018). A full breakdown of the results by Area is given in Appendix 1 (page 7).

Baseline results for the Levenmouth Area are summarised below.

Note: while some results from Levenmouth may appear higher or lower than Fife, this does not represent any significant differences between Levenmouth and Fife in relation to either use of the internet or the level of digital skills.

89.1% of Levenmouth residents connect to the internet for personal use, just below 90.8% for Fife.

Levenmouth has slightly lower levels of personal use for most activities compared with the Fife average (excluding social media (55%) and information searches (83.7%)). Levenmouth has the lowest levels of all the areas for buying goods / services (75.2% compared to 80.9% for Fife), accessing Government / business websites (55.8% compared with 59.2% for Fife), and internet banking (55.0% compared to 62.4% for Fife).

Levenmouth has the lowest level for accessing the internet by using a personal computer/laptop (69.8%) and the highest level for access by using a mobile/smart phone (69.0%) or a games console (11.6%). Levenmouth has slightly lower levels of personal use for accessing the internet from various venues or locations compared with the Fife average.

Levenmouth has slightly lower levels of use for carrying out most digital tasks compared with the Fife average (with the exception of creating images/music/video).

Levenmouth has the lowest levels of all the areas for finding a previous website, downloading or sharing a photo, making comments or sharing information, buying items/services, and completing online application forms for personal details.

Benefits of Digital Skills

The Centre for Economics and Business Research (CEBR) have identified five areas in which individuals who acquire basic digital skills are able to benefit:

1. **earnings benefits**: these relate to increased earnings of between 3% and 10% through acquiring digital skills.
2. **employability benefits**: this reflects the improved chances of finding work for someone who is unemployed and an increased likelihood that someone who is inactive will look for work.
3. **retail transaction benefits**: shopping online has been found to be 13% cheaper on average than shopping in-store.
4. **communication benefits**: basic digital skills can enable people to connect and communicate with family, friends and the community 14% more frequently.
5. **time savings**: these relate to the time saved by accessing government services and banking online rather than in person, estimated to be about 30 minutes per transaction.

Free Public WiFi

Wifi has become so engrained in society now that it is almost taken for granted in many situations. There is a growing expectation that when you are out and about in town centres and other public areas, that there will be free public wifi available.

Unfortunately, there is limited evidence on how much providing free public wifi influences the growth in economic prosperity for local businesses and the wider local community. There are, however, a number of factors that are evident from those towns, council areas and businesses that have introduced free public wifi that are worth highlighting.

Benefits to customers and visitors include:

- Free: this is a big attraction for most people, particularly those on low incomes, students/pupils, or others with limited internet access, as it saves on mobile data charges, and so people are drawn to areas providing free public wifi.
- It can promote productivity: venues and areas that provide free public wifi allow people to work on-the-go, rather than being fixed to designated areas or locations for internet connection.
- In emergency situations: having access to free and reliable wifi provides an added benefit of safety and security.

Benefits to businesses include:

- As a means to encourage residents and visitors in the area to stay for longer and visit more shops, businesses, hospitality and other venues.
- Having access to anonymous footfall data from the wifi usage, helps in the collection, identification and analysis of trends, and to monitor the impact of changes to town centre areas, which can help to shape future improvements and regeneration projects.
- It helps local businesses to better target their marketing to customers by introducing apps, social media links and other specific advertising for the products and services that are on offer in the local shops and businesses.
- It encourages more visitors and tourists to an area if there is free public wifi, making it easier for them to access local information, and can provide a marketing advantage over other areas that don’t have free public wifi.

Some of the limitations of public wifi include:

- Reliability issues: some public wifi may be less reliable, particularly if a lot of people are using it at the same time, such as, at peak times.
- Third party advertisements: some public wifi provision may include advertisements, which some people may find annoying.
- Security issues: public wifi networks tend to be less secure, as several people access the network at the same time on the same spot, and it is safer not to send or access confidential and personal data while on a public wifi network.
- Slow speed: a public wifi network is usually accessed by several people at the same time. This can result in a considerable loss of bandwidth leading to a slow network speed.
- Access to public wifi: the recent ‘stay at home’ orders, closure of public and community facilities, and physical distancing restrictions will have impacted on both the availability of public wifi and people’s ability to connect to it.

Attitudes to digital engagement during COVID-19

A YouGov Survey was undertaken as part of Lloyds Bank Consumer Digital Index Report 2020 to help gauge the impact of the COVID-19 pandemic, 78% of people agree that the pandemic has escalated the need for digital skills and 80% agree that using technology has been a vital support to them. Half of people (51%) believe the need for digital skills in their home/work life due to the lockdown has been more necessary. 35% state their motivation has been for non-work-related reasons, and as this proportion increases with the number of children in the household; this could be due to the requirement on using tools and platforms to help with schoolwork.

More than half (54%) of people have shared that the key skills for lockdown are knowing how to use video chat and social media for their social life and to check on loved ones. 47% have found buying products and services online important to them while only 36% thought that understanding how to stay safe online was important. 37% agree that they have used more technology than usual to help with their mental health and well-being during the crisis. 31% have improved their digital skills solely for work-related reasons.

Changes in consumer spending behaviour

There have been radical changes in consumer spending behaviour since the start of the pandemic. With the forced closure of all but essential offline retail stores, consumers were forced into sourcing many goods and services online. There are obvious benefits to online shopping in the last year, such as lowering health risks, while also promising lower costs and more choice.

81% of internet users currently make online purchases, therefore if a substantial increase in digital grocery shopping is to happen, it is likely to be from those who are already familiar with how to shop online. The least digitally engaged are at a real disadvantage. They are more likely to be paying higher household bills irrespective of income, household or age; for utilities alone, they are spending an average of over £348 more per year. They are also less likely to earn as much as those who are digitally engaged (around £2,000 a year less).

It is thought that several years of gradual, structural change towards higher usage of online shopping has rapidly accelerated in a matter of months. Online spending naturally became a bigger share of total UK household consumption during lockdown.

These changes in spending patterns are occurring alongside broader changes in household finances occurring during the pandemic. There is an already familiar Covid-19 narrative: the crisis has generated a sudden, sharp shock to UK household finances and lifestyles. Many households are not equipped to deal with financial shocks of such severity.

While offline spending has risen since restrictions eased, there is early evidence of a ‘new normal’ in which online spending is roughly 25% higher than its pre-pandemic level. It is not clear yet whether the recent shift to online will be a new permanent structural feature of consumer retail, or simply a short-term result of location-constrained consumers sourcing goods and services from available outlets.

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Appendix 1 – Fife People's Panel Survey 30 – Communications (2018)

Internet Usage by Area Committee

Q6a. Do you connect to the internet for personal use? Yes.

Dunfermline	Cowdenbeath	Glenrothes	Kirkcaldy	Levenmouth	North East Fife	South West Fife	Fife
91.3%	91.1%	91.7%	92.3%	89.1%	91.5%	88.8%	90.8%

Q7b - What personal use do you make of the internet?

Activity	Dunfermline	Cowdenbeath	Glenrothes	Kirkcaldy	Levenmouth	North East Fife	South West Fife	Fife
Send and receive emails	83.2%	82.3%	83.9%	82.4%	79.1%	85.4%	78.4%	82.1%
Buy goods or services	82.6%	84.7%	83.3%	80.6%	75.2%	83.3%	75.4%	80.7%
Use Social Media	56.4%	61.3%	51.6%	48.2%	55.0%	43.5%	50.7%	52.4%
Search for information	83.9%	84.7%	87.0%	78.4%	83.7%	82.9%	76.9%	82.5%
Play or download games, films or music	42.3%	40.3%	41.7%	32.0%	36.4%	32.9%	33.6%	37.0%
Make telephone/video calls over the internet	32.9%	32.3%	29.7%	29.3%	27.9%	33.7%	27.6%	30.5%
Create websites or blogs	7.4%	4.0%	2.6%	3.2%	3.9%	7.3%	3.7%	4.6%
Look for/apply for jobs	33.6%	27.4%	32.3%	25.7%	26.4%	17.5%	25.4%	26.9%
Government business tax / benefits / DVLA etc	63.1%	62.1%	60.9%	57.7%	55.8%	59.8%	56.7%	59.4%
Local council business council tax / housing etc	35.6%	40.3%	38.0%	37.4%	34.1%	28.0%	26.9%	34.3%
Order repeat prescriptions/ book medical appointments	30.9%	24.2%	32.8%	26.6%	27.9%	37.4%	30.6%	30.1%
FifeDirect	46.3%	45.2%	46.4%	41.4%	41.1%	35.0%	35.1%	41.5%
Internet banking	64.4%	66.1%	68.8%	62.6%	55.0%	62.2%	59.0%	62.6%

Q7c - Where do you connect to the internet for personal use?

Venue/Location	Dunfermline	Cowdenbeath	Glenrothes	Kirkcaldy	Levenmouth	North East Fife	South West Fife	Fife
At home	92.6%	88.7%	90.6%	91.4%	89.1%	90.2%	87.3%	90.0%
A government/council office	3.4%	4.0%	5.7%	4.1%	3.9%	1.2%	5.2%	3.9%
At work	27.5%	22.6%	27.1%	24.8%	17.1%	19.9%	15.7%	22.1%
Public library	4.7%	7.3%	4.7%	6.3%	5.4%	7.7%	5.2%	5.9%
School, college, university etc	1.3%	0.0%	1.6%	0.5%	1.6%	0.8%	0.0%	0.8%
Community or voluntary centre / organisation	2.0%	1.6%	2.1%	0.9%	1.6%	2.8%	2.2%	1.9%
Internet cafe or shop	4.7%	7.3%	3.6%	3.2%	3.9%	6.5%	5.2%	4.9%
On the move via a mobile phone / tablet	51.0%	49.2%	53.6%	40.1%	45.7%	43.1%	41.8%	46.4%
At another person's home	22.8%	20.2%	19.3%	14.9%	16.3%	11.4%	15.7%	17.2%

Q7d - How do you access the internet for personal use?

Method	Dunfermline	Cowdenbeath	Glenrothes	Kirkcaldy	Levenmouth	North East Fife	South West Fife	Fife
Personal computer or laptop	80.5%	70.2%	79.2%	79.7%	69.8%	77.6%	74.6%	75.9%
Digital, cable or satellite tv	22.1%	16.9%	22.9%	18.0%	19.4%	17.9%	18.7%	19.4%
Mobile / Smart phone	64.4%	68.5%	66.7%	62.2%	69.0%	56.9%	67.2%	65.0%
Games console	7.4%	7.3%	8.3%	3.6%	11.6%	3.7%	7.5%	7.1%
Tablet iPad etc	65.1%	62.1%	57.3%	53.6%	57.4%	51.2%	56.7%	57.6%

Digital Skills by Area Committee

Q8 - Which of the digital tasks listed below are you able to do if required?

Digital Task	Dunfermline	Cowdenbeath	Glenrothes	Kirkcaldy	Levenmouth	North East Fife	South West Fife	Fife
Use a search engine to look for information online	89.9%	91.9%	90.6%	89.2%	89.1%	87.8%	88.1%	89.5%
Find a website you have visited before	90.6%	89.5%	86.5%	85.6%	85.3%	87.0%	86.6%	87.3%
Download/save a photo you have found online	79.9%	72.6%	70.3%	71.6%	69.0%	67.9%	71.6%	71.8%
Send a personal message by email or online messaging service	89.9%	91.1%	89.6%	86.0%	88.4%	87.0%	90.3%	88.9%
Carefully make comments and share information online	71.8%	65.3%	63.0%	64.4%	58.9%	62.2%	64.2%	64.3%
Buy items or services from a website	85.2%	90.3%	83.9%	83.3%	78.3%	85.4%	84.3%	84.4%
Buy and install apps on a device	71.1%	71.0%	66.7%	58.6%	64.3%	59.3%	60.4%	64.5%
Verify sources of information you have found online	65.1%	63.7%	56.8%	59.9%	59.7%	55.3%	64.2%	60.7%
Solve a problem with a device/digital service using online help	71.8%	67.7%	66.1%	63.5%	62.8%	60.2%	64.2%	65.2%
Complete online application forms which include personal details	80.5%	79.8%	76.6%	71.2%	64.3%	72.8%	73.9%	74.2%
Create something new from existing online images/music/video	43.6%	46.0%	37.5%	35.6%	40.3%	31.7%	32.1%	38.1%