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GMCA DIGITAL INCLUSION PILOT: RESEARCH REPORT

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INTRODUCTION

Following his re-election in May 2021, Mayor of Greater Manchester, Andy Burnham, announced ambitions for Greater Manchester to become one of the first city regions in the world to equip all under-25s, over-75s and disabled people with the skills, connectivity, and technology to get online.

As part of his reinforced commitment to get residents online, he established a Digital Inclusion Action Network. The aim of this Action Network is to lead targeted action to combat digital exclusion with a specific focus on supporting under-25s, over-75s and disabled people in Greater Manchester.

"If Greater Manchester is truly going to be a world leading digital city region, we have to make a big commitment to fix the digital divide, the consequences of not doing so are severe – with our people at risk of further social isolation, lack of equal opportunities and not being able to access support."

Andy Burnham, Mayor of Greater Manchester

Acting on this pledge, the Greater Manchester Combined Authority (GMCA) launched a series of pilots including the Social Housing Digital Inclusion Pilot.

Background to the GMCA Social Housing Pilot

The Social Housing Digital Inclusion Pilot represents one of the largest attempts of its kind undertaken in the UK. This pilot started in September 2022 and sought to link up to 5,000 households, across five Social Housing Providers (SHPs), with five Internet Service Providers (ISPs). In doing so, by establishing a partnership between the public and the private sectors, it aims to explore what socially and economically viable options for social tariff and digital inclusion support (including equipment, access, and training) may exist for social housing tenants. Partners on the pilot project include:

Public sector partners:
• GMCA
• Wythenshawe Community Housing Group
• Bolton at Home
• Stockport Homes
• Wigan and Leigh Housing
• Southway Homes

Private sector partners:
• Virgin Media O2
• Hyperoptic
• BT/Openreach
• Talk Talk/Freedom Fibre
• Vodafone

Led by Professor Simeon Yates, this collaborative research study between the Digital Media and Society Institute and the Heseltine Institute, both at the University of Liverpool, was conducted with a view to analysing outcomes from the pilot project, identifying key points of learning, and considering what these might mean for future projects of this type.

Why social housing was selected

The digital exclusion challenge is greater for people living in low-income households, including social housing tenants. We estimate that 55% of social housing tenants (500,000+ people) are digitally excluded in some way.[1] With one in five residents in Greater Manchester living in social housing,[2] exploring models that address barriers and improve take-up and outcomes for people in social housing would make a significant impact on reducing digital exclusion for the region.

This approach was chosen as social housing providers are trusted organisations with a strong commitment to supporting tenants in ways that go beyond their landlord/tenant relationships including such things as employability, addressing loneliness and health. The majority of social providers are well integrated with community partners, support groups and local authorities, with a willingness to address digital inclusion through existing and new initiatives.

Conversely, ISPs have traditionally struggled to engage with social housing providers in advancing the rollout of full-fibre investment and there are significant gaps in high-speed connectivity coverage in social housing in Greater Manchester. Therefore, bringing these organisations together could potentially benefit both, while achieving better outcomes for tenants.

Pilot project aims, objectives and framework

GMCA wanted to understand to what extent it is possible to create a sustainable model for digital inclusion in social housing, while working with the market to understand the optimal conditions for this to happen. To try to find the answer to this, GMCA developed the logic model for the project (see Figure 1). The overarching aims for the project were:

1. To lift people out of digital exclusion by providing internet connections, devices, and support.
2. To improve people's lives by getting them online.
3. To improve outcomes for social housing providers.
4. To create a model of purchasing digital connectivity for larger groups, collectively.

By using this model, GMCA hoped to achieve the following objectives:

1. To create a long-term sustainable solution to address digital exclusion in social housing through a demand aggregation model.
2. To determine what the role of the social housing provider working with the ISP and the local authority needs to be to make a model work.
3. To determine the extent to which a viable commercial model is possible through demand aggregation which is both attractive enough to tenants to get them to register AND could enable recycling of some revenues to support the digitally disadvantaged.
4. To determine which solutions deliver the best outcomes for our target digitally excluded groups (over 75s, disabled groups and young people) – and where other public funding interventions may be required.
5. To shape the optimum model for GM Wide Rollout – including standardising wayleaves to maximise investment and competition.

The research question

The Greater Manchester Social Housing Pilot therefore posed the following research question:

Figure 1: *Logic model (GMCA)*

To what extent is it possible to create a sustainable model for digital inclusion in social housing, working with the market to optimise the conditions for this to happen?

The pilot has very much stress tested this question as we will report below. In doing so, it has clearly identified the limits to which market response (e.g., from ISPs) can deliver digital inclusion (see Section 5.3.5 and Section 6.1.1). It has also identified areas where regional and devolved government can help to improve conditions (see Section 8.2) as well as highlighting issues for national policy.

National context

In the broader context of digital inclusion, much research has been undertaken on the demographic predictors and consequences of digital exclusion. The challenges of digital exclusion and inequalities are not new. Evidence from research and intervention[3], much of it from research team members, point to a complex interplay between levels and types of social and digital inequalities. Digital inequalities encompass differences, lacks and limitations in access, skills, and capabilities with regard to digital systems that have significant tangible consequences for citizens, households and communities. Those most disadvantaged have the potential to continue to lose out further. The COVID-19 pandemic and current cost-of-living crisis reveal *absolute* digital exclusion where already vulnerable individuals find themselves significantly disadvantaged – socially disconnected, economically struggling to access benefits or government assistance, or make online payments. They also reveal the complexity of *relative* digital exclusion, making visible the challenges faced by 'limited users', those millions with access who yet fail to fully benefit from access to digital systems due to a lack of skills, support and capabilities. Previously documented evidence showed that the opportunities and abilities to utilise digital tools to work from home[4] and provide educational opportunities[5] are inequitably distributed.

1 According to analysis of Ofcom Tech Tracker data conducted by Prof. Simeon Yates, 55% of people renting from a Local Authority, Housing Association or Housing Trust in the North West of the UK are Non-Users, Very Limited, or Limited Users of digital systems (whether accessing these via home broadband or mobile data).
2 https://www.greatermanchester-ca.gov.uk/media/7877/230414-housing-tenure-accessible.pdf

3 Blank et al (2017) "Local Geographies of Digital Inequality", Social Science Computer Review. 36 (1) 82–102; Clayton and Macdonald (2013) The limits of technology: social class, occupation and digital inclusion in the city of Sunderland, England. Information, Communication & Society 16(6); Helsper (2012) A corresponding field model for the links between social and digital exclusion. Communication Theory 22(4); Helsper and Reisdorf (2017). The emergence of a "digital underclass" in Great Britain and Sweden: Changing reasons for digital exclusion. New media & society, 19(8); van Deursen and Helsper, (2018). Collateral benefits of Internet use: Explaining the diverse outcomes of engaging with the Internet. new media & society, 20(7), 2333–2351; van Dijk, J., & Hacker, K. (2003). The digital divide as a complex and dynamic phenomenon. *The information society, 19*(4), 315–326; Yates and Lockley (2018). Social media and social class. American Behavioral Scientist, 62(9), 1291–1316; Yates, Kirby and Lockley (2015). Digital media use: Differences and inequalities in relation to class and age. Sociological research online, 20(4), 1–21; Yates and Lockley (2020), "Digital Engagement and Class: Economic, Social, and Cultural Capital in a Digital Age" in Yates, S.J., Rice, R., eds. (2020).
4 Hargittai (2001). Second-level digital divide: Mapping differences in people's online skills. arXiv preprint cs/0109068.
5 Robinson, (2009). "A Taste for the Necessary: A Bourdiesuian Approach to Digital Inequality.", Information, Communication and Society, Vol. 12, No. 4, p. 488–507; Selwyn, (2003). Apart from technology: understanding people's non-use of information and communication technologies in everyday life. Technology in society, 25(1), 99–116.
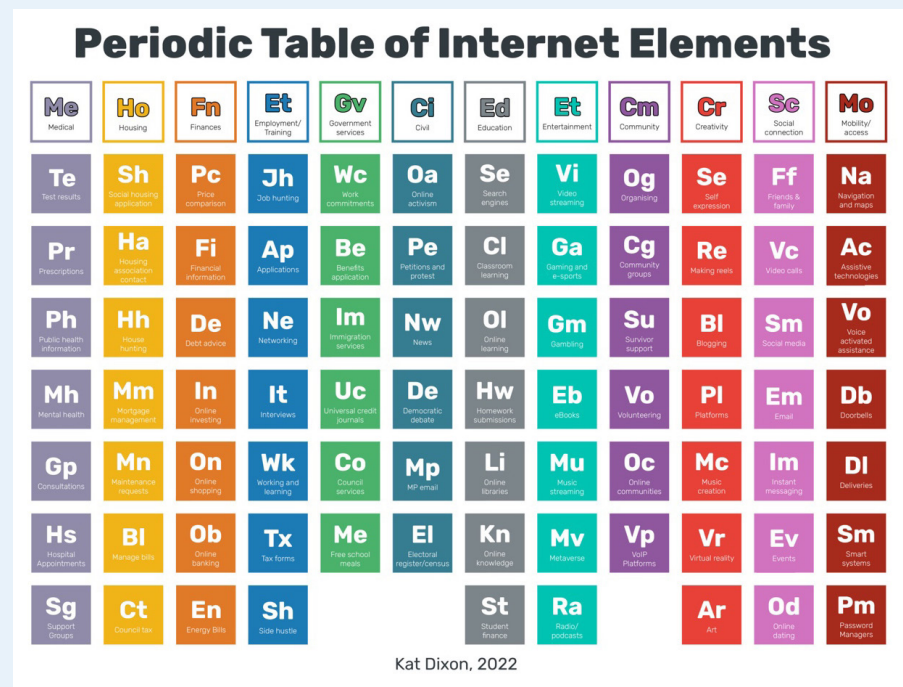
Periodic Table of Internet Elements

Kat Dixon, 2022

Figure 2: *Periodic Table of Internet Elements (Dixon, K., 2022)*

To help researchers, policy makers and the public appreciate the breadth of the range of impacts that digital exclusion can have, Dixon[6] devised the "Periodic Table of Internet Elements" (See Figure 2). This graphic was derived from the assessment of each social domain and the kinds of social and personal activity that have become wholly, mostly, or partly digital. It clearly demonstrates the breadth of impact that a lack of digital access and skills can have on individuals and households. In Section 3 we provide GMCA and UK level evidence of the prevalence of digital exclusion among social housing tenants.

Alongside the GMCA study reported

here, the research team has been undertaking a UK wide and additional devolved nation (Wales) collaborative project to develop a Minimum Digital Living Standard (MDLS) for households. Initially assessed for households with children (see Blackwell et al., 2023[7]), our deliberative group work with members of the public reached a consensus definition of MDLS:

A minimum digital standard of living includes, but is more than, having accessible internet, adequate equipment, and the skills, knowledge, and support people need. It is about being able to communicate, connect, and engage with opportunities safely and with confidence.
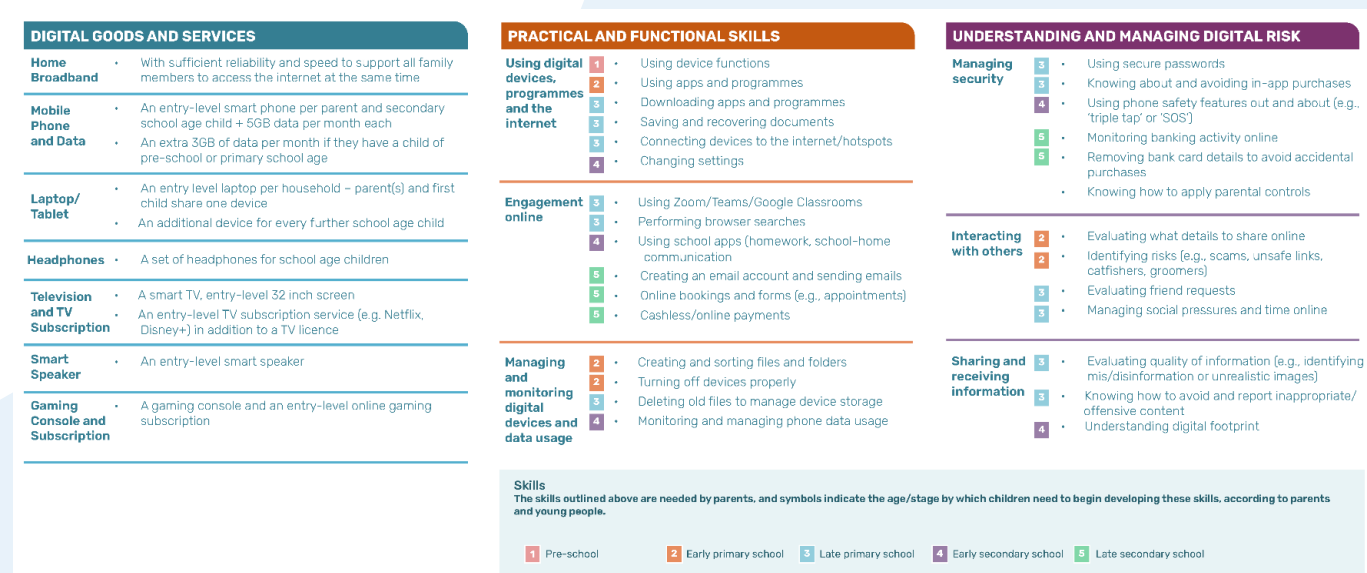
The three key components of the MDLS (see Figure 3) clearly complement the findings presented later in this report:

- Digital goods and services
- Practical and functional skills
- Understanding and managing digital risk

One of the key findings from MDLS is that access via a mobile phone is not enough. To reach a reasonable level of digital inclusion requires both mobile data and broadband access. Though mobile access with sufficient data is necessary, it is not sufficient to sustain reasonable digital access and opportunities.

Figure 3: *Minimum Digital Living Standard Definition*

6 https://www.goodthingsfoundation.org/insights/internet-periodic-table/
7 https://mdls.org.uk

RESEARCH METHODOLOGY

Research study aims and objectives

The University of Liverpool was commissioned by GMCA to undertake an observational and reflective study of the social housing digital pilot. Led by Professor Simeon Yates, the aims of the research project were to undertake the following:

1. Initial assessment of digital access, skills, and community support for each area, including new survey data and administrative data

2. Qualitative exploration of impacts of digital exclusion in target communities and observational and ethnographic documentation of the programme set-up and implementation in each target area

3. Quantitative assessment of the uptake of the programme and demographics of households

4. Qualitative examination of household and community experience of programme participation

5. Qualitative and quantitative assessment of digital exclusion factors in each area

As we will note in the report below, the material circumstances of social housing tenants and the pressures on frontline staff impacted the ability to collect data in some contexts. Though this has limited the research overall, it is itself a key learning point. Digital inclusion projects undertaken in social housing contexts are taking place within an already complex service delivery environment. Both housing tenants and housing providers are under a range of personal and organisational constraints. These conditions had a key impact on both the delivery of the intervention and the ability to document this at scale. As a research team, we are very keen to stress that our descriptions and discussions of the challenges and limitations of the pilot are not to be read as criticisms for three reasons. First, as is evident in this report, all parties made best if not sterling efforts to make the pilot a success. Second, this was a very

ambitious pilot and was undertaken in part to identify, address, or propose solutions to the issues encountered. In this respect, we assess the pilot to have been very successful. Third, the pilot started as the COVID-19 pandemic was still in flow and has continued through the current cost-of-living crisis. This has placed significant strains on the participating organisations but also created a very different context than was in place when the pilot was planned.

Methods

This study adopted a mixed method approach. Both qualitative and quantitative methods were deemed suitable, given the nature of the project, to explore the breadth and depth of the social housing digital pilot. The research design and fieldwork were carried out by the research team from the University of Liverpool and followed an iterative process, informed by periodic discussions with GMCA and SHPs. As part of this project, the research team also committed to holding regular sessions to share the findings, which were convened by GMCA and were open to organisations from within and outside the city region.

After conducting a review of relevant literature, fieldwork took place from November 2022 to April 2023, across the areas included in the pilot project. In terms of data collection, the methods used were:

1. Semi-structured stakeholder interviews (n = 15) – these were conducted and recorded online via Zoom or Microsoft Teams, with three representatives of local authorities, five SHPs from each of the five areas taking part in the pilot project and six ISPs. Interviews were 45 minutes to an hour long and interviewers followed an interview schedule devised by the research team. Interviews were recorded via Zoom or Teams, transcribed using Otter.ai and anonymised.

2. Focus groups with tenants, in groups of between two and eight – these

were conducted in December 2022 with tenants recruited by the SHPs that were part of the Digital Inclusion pilot. Focus group discussions were held in community centres and at Bolton at Home offices. Timings were between 30 minutes and an hour. Interviewers loosely followed an interview schedule devised by the research team and conversations were allowed to reach an end organically. Focus groups were recorded via Dictaphone, transcribed using Otter.ai and anonymised.

3. A telephone survey of tenants – this combined a survey conducted by Stockport homes (n = 481) and a follow up survey (n = 96) using a reworked version of the Stockport template conducted by *TeamResearch* covering other SHP areas on behalf of the University of Liverpool. These two surveys took place in 2022 and between July and August 2023 respectively.

Participants were selected via the research team's partners in the project, who acted as gatekeepers. For the stakeholder interviews, GMCA provided the research team with the contact details of relevant stakeholders: ISPs, SHPs and the Digital leads from the Local Authorities. The research team then reached out via email with information about the project and an invitation to interview. Each of the SHPs were well integrated within their local community. Beyond the traditional landlord and tenant relationship, the providers offered services including young persons' groups, support for older people, community food pantries, interventions related to health and wellbeing and skills and employability.

For the focus groups, tenants were recruited with the support of the engagement teams from the SHPs, who publicised the research project, both in their newsletter and their social media networks. The research team sought to recruit tenants from a range of demographic backgrounds in terms of, e.g., ethnic background, age, ability, gender (though this information was

not requested as part of the consent process). To raise awareness of this project, members of the research team attended activities within SHPs' local communities with the aim of recruiting participants for the focus groups.

Participants for the telephone survey were recruited with the support of the SHPs. Textual data from interviews and focus groups was transcribed using Otter.ai and anonymised, then four members of the research team coded the data and conducted qualitative analysis using NVivo. The team coded the data thematically using three sub-categories: ISPs, SHPs and tenants. Themes were derived from the data and analysis was conducted iteratively through regular meetings, discussions and note-taking by the research team. Survey data and national datasets were analysed using SPSS and R.

GMCA TENANTS COMPARED TO UK DATA

The survey data looked at a range of issues:
- Comparison to national datasets
- Views on social tariffs

Comparison to national data

A key argument for this project is the link between being a social housing tenant and being offline. We have therefore compared regional data with national trends to confirm that this holds for GMCA. Overall, the survey data present a very similar picture to that nationally across a range of key measures:
- Being totally offline
- Age
- Health and disability
- Device use
- Dependence on mobile (data) access to the internet (rather than broadband)

Social housing non-users

Levels of non-use, never going online or using the internet in the UK currently stand at about 8% of the population. Analyses of the Ofcom 2023 Tech Tracker data puts the percentage of social housing tenants in the UK who are non-users at 13%. The GMCA survey data puts this number even higher at 23% for GMCA social housing tenants.

Age

As with national figures, age is a key predictor of being fully offline for those in social housing (see Figure 4). Non-users in GMCA and nationally, who are in social housing, are more likely to be older (56+). Though it is a key predictor nationally, it is more pronounced for those living in social housing in both GMCA and UK as a whole.

Health and disability

A similar pattern can be found in GMCA as nationally, with those social housing tenants declaring a disability or limiting health condition being more likely to be offline (see Figure 5).

Device use

Similarly, GMCA social housing tenants, like those in the wider UK, are more likely to be smart device (phone or tablet) users or have no devices (see Figure 6). A larger proportion of GMCA social tenants had 'no device' (25%) compared to the social tenants in the UK as a whole (13%). A similar proportion of GMCA tenants are smart device (phone or tablet) only users (41%) compared to the national social housing tenants (45%). A deeper analysis for GMCA residents indicates that:
- Over 75s are least likely to have a smartphone, under 55s are more likely.
- Hardly any respondents of any age or backgrounds have PC/Desktop.
- Those 36 or older are more likely to have a smart TV.
- Those over 56 are unlikely to have a laptop.
- Overall, less than 50% of all respondents have a laptop.
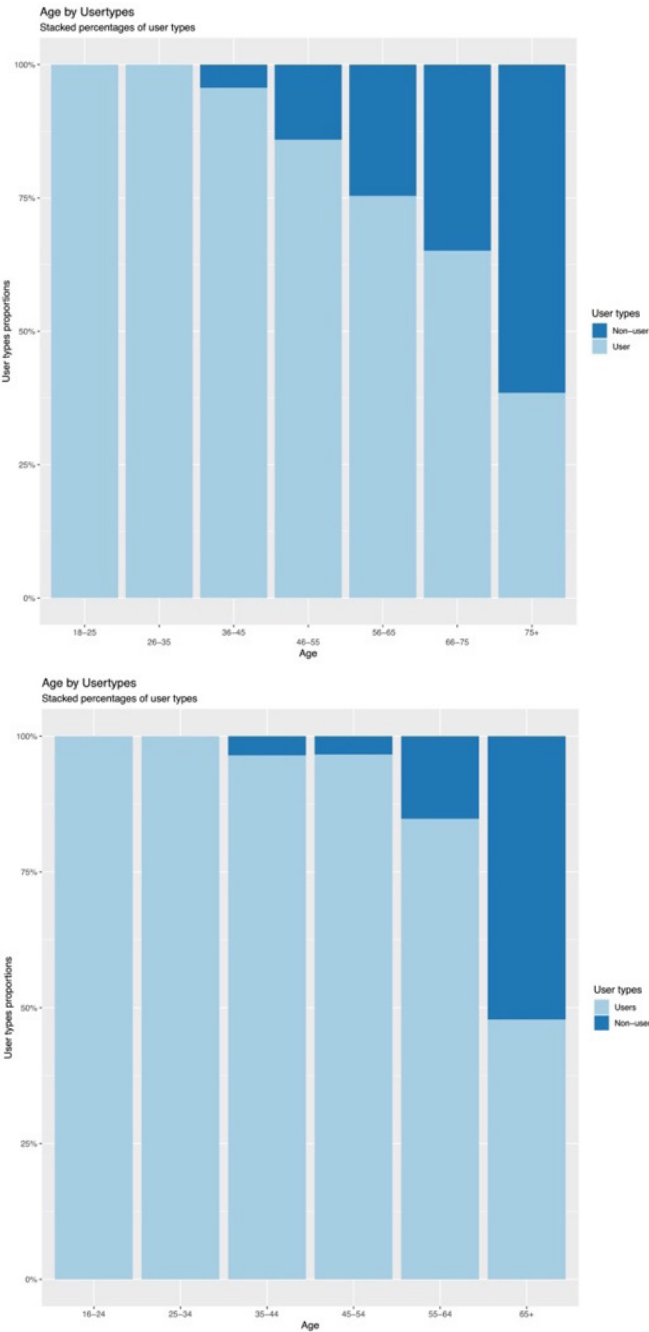
Figure 4: *Stacked Bar Percent of Age and Internet use (Top: GMCA, Bottom: UK)*

- Tablets are more common across all age groups.
- Over 50% of people in the 26-35 age group have a tablet device.
- 16% of residents are smartphone only users.

As with the national picture, social housing tenants are unlikely to have the digital equipment to best support access to services (tablet or laptop) or to support access to employment opportunities and skills (laptop).

8

9
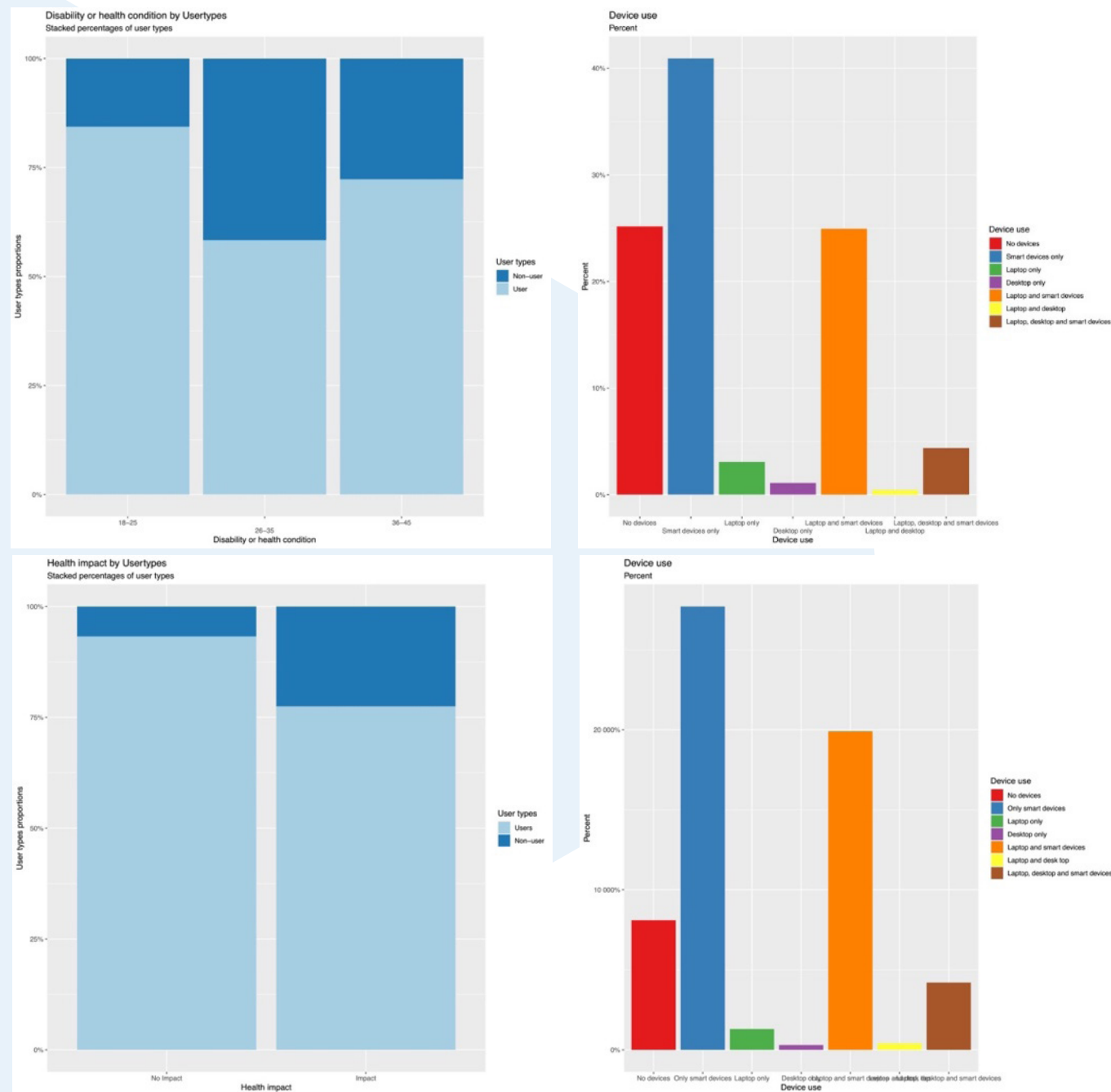
Figure 5: *Stacked Bar Percent of having Health Impacts or a Disability and Internet use (Top: GMCA, Bottom: UK)*

Figure 6: *Bar Percent of Device access for social housing tenants (Top: GMCA, Bottom: UK)*

Broadband vs mobile data access

GMCA residents in social housing are slightly more likely to be accessing the internet on mobile data only plans (28%) as compared to the broader national picture (24%) (see Figure 7). However, this has to be assessed in the context of higher numbers of overall non-users.

Overall comparisons

GMCA social housing residents appear to have a similar profile to national residents. In particular:
- Older users are less likely to be online.
- Those offline are more likely to have a long-term health condition**.**
- They are very likely to have no digital devices or to only have 'smart devices' (smartphone, tablet).

- They are notably more likely than the UK average to use mobile data solutions for access to the internet.

Given the similarities to the national picture, we can infer several further features of social housing tenants in GMCA. First, like their national counterparts (see Figure 8), GMCA social housing tenants are more likely to be Limited or Non-users of the internet and digital services. Limited users are those with very low probabilities of undertaking any of the 18 internet activities measured by Ofcom in their Media Literacy and Tech Tracker surveys. These include such things as online banking and shopping, using local and government services and the use of social media[1]. Second, they are very likely to have low digital literacies, low awareness of good cyber security practices and limited knowledge of how

Figure 8: *Bar Percent of User Types for UK social housing tenants*

As we also note below (see Section 6.2), Non-users in the UK have fallen from 20% in 2010-2013 to 8% in 2023. Fully offline users are now some of the most vulnerable older (though not all) people in the UK, often with very low incomes. A larger group often in social housing are people who use the internet in limited ways, may have intermittent access, and have low digital skills. These results emphasise the importance of social housing as a key context where digital inclusion interventions are both acutely and chronically needed.

Figure 7: *Bar Percent of Type of internet access for social housing tenants (Top: GMCA, Bottom UK). Note mobile data only is orange for GMCA and red for UK*

contemporary digital platforms work[2]. This puts them at a greater risk of online harms, misinformation and scams.

Conclusions

From this analysis we can conclude the following:
- Social housing both in the UK and GMCA is a key context in which many residents are more likely to be fully digitally excluded or Limited digital users.
- GMCA social housing tenants appear to be slightly more likely to be offline or only have mobile access compared to social housing tenants in the UK as a whole.
- GMCA social housing tenants who are Non-users have a similar profile to UK social housing tenants in regard to age and health status.

1   Yates, S.J., Lockley, E., (2020), "Digital Engagement and Class: Economic, Social, and Cultural Capital in a Digital Age" in Yates, S.J., Rice, R., (eds.), *The Oxford Handbook of Digital Technology and Society,* Oxford: Oxford University Press (ISBN: 9780190932596); Yates, S.J., Carmi, E, Lockley, E., Pawluczuk, A., French, T., Vincent, S., (2020), "Who are the limited users of digital systems and media? An examination of UK evidence". First Monday, Vol. 25, No. 7. (ISSN:1396-0466).

2   Yates, S.J., Carmi, E., Pawluczuk, A., Lockley, E., Wessels, B., Gangneux, J., (2021), *Understanding citizens data literacies research report,* University of Liverpool.

INTERVENTIONS

The interventions in each area are described in Table 1. We would note that rollout of the interventions took place at different rates and times with breaks and some reorientations as the project progressed. As will be explored later in Section 5, some of these delays arose from the complexity of delivering these interventions. One ISP noted:

ISP1: *Reflecting, it took too long for us to be able to get everything pulled together. We were slightly later in being able to deliver than we would have liked and a number of reasons for that was to do with process and legal requirements and then actual delivery requirements which we're still challenged with at the moment. The project has been complicated, but it's not been about the people. It's just about the processes and the levels of additional requirements that we need to do to each to meet the conditions of the SHP.*

In terms of the format of the interventions, below (and as shown by Table 1) is a summary of what took place in each area:

- **Bolton**: Hyperoptic (ISP) worked with Bolton at Home (SHP) to offer 1000 social housing residents with access to their own network. As part of this initiative, they allowed residents to choose either a social tariff of between 15 and 25 GBP, depending on a package of their choice, or a special offer of 5 GBP a month. Of the 1,000 residents, 49 took the special offer and three the social tariff, with 52 being the total uptake figure.

- **Southway**: Vodafone (ISP) worked with Southway Homes (SHP) to offer free data sim packages to 1000 social housing residents for six months. Due to restrictions on the amount of data offered (i.e., 20 Gb per month),[1] 596 residents did not take up the offer and those who were already

in contract with a different provider decided to remain with them. By contrast, the rest of the residents took up the offer, with 404 being the final uptake figure. After six months, these residents were given the option to have the same amount of data for 5 GBP a month on a rolling contract.

- **Stockport**: BT (ISP) worked with Stockport Homes (SHP) to offer a social tariff, to social housing residents in the area, that is available across the UK. As part of this initiative, they connected two community hubs for six months. In addition, they worked collaboratively with a local community learning group called Starting Point, which provided basic digital skills training to some of the residents. BT contributed to Starting Point a six-month payment for the delivery of this training. No data is available about the number of residents in Stockport who took the social tariff or training.

- **Wigan**: TalkTalk (ISP) worked with Wigan and Leigh Housing (SHP) and Freedom Fibre, a company providing digital infrastructure, to offer connectivity to 1000 social housing residents in the area. As part of this initiative, they also wanted to connect, free of charge, local community hubs in the area (e.g., through libraries and community centres). Unfortunately, after a period of planning for this intervention to be rolled out, the council decided to contract another provider. As a result, the intervention planned by TalkTalk, never took place and no data was collected.

- **Wythenshawe**: Virgin Media O2 (ISP) worked with Wythenshawe Community Housing Group (SHP) to offer connectivity for 12.50 GBP per month to 1000 social housing residents in the area. In addition, 52 Virgin Media O2 volunteers delivered 190 hours of basic digital skills training to some of the residents. Delivery of this training was customised to residents needs and focused, for example, on completing online forms or uploading and managing online photos. In terms of final uptake figures, 39 of the 1,000 residents accepted the connectivity offer with 19 residents as new customer and 20 existing customers. In particular, the existing customer chose the offer that was less expensive than their current package. As for digital training, 136 people were supported by the delivery of these services (see Section 10, Appendix B).

Table 1: *Interventions*

Area	ISP	SHP	Offer of connectivity	Digital training	Target number of residents	Uptake
Bolton	Hyperoptic	Bolton at Home	Social tariff of between 15 and 25 GBP or a special offer of 5 GBP a month	N/A	1000	52
Southway	Vodafone	Southway Homes	Free data sim packages (of 20 GB per month) for six months	N/A	1000	404
Stockport	BT	Stockport Homes	Social tariff and connection of two community hubs for six months	Worked with Starting Point, which provided basic digital skills training	1000	N/A
Wigan	TalkTalk	Wigan and Leigh Housing	Planned offer of connectivity and connection of community hubs but intervention never took place	N/A	1000	N/A
Wythenshawe	Virgin Media O2	Wythenshawe Community Housing Group	12.50 GBP per month	52 Virgin Media O2 volunteers delivered 190 hours of basic digital skills training	1000	39 (took up the connectivity offer), 136 (were supported by digital training)

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1   At the time of the pilot Vodafone offered 20Gb of data per month. After the pilot, their offer increased to 40Gb of data and this is currently provided in the National Databank programme.

FINDINGS

In the following section of this report, we set out the findings from our qualitative research in line with the three sub-categories used in analysis:

- Social Housing Providers (SHPs)
- Internet Service Providers (ISPs)
- Tenants

Social Housing Providers

The data from SHPs fell into three thematic areas:

- Digital inclusion activities
- Situating digital inclusion within social housing provision
- Working in partnership

Digital inclusion activities

Prior to the beginning of the pilot, all the SHPs we spoke to had already been offering some support to get tenants online.

These included community-based interventions with names like 'Silver Surfer' and 'Tech and Toast' sessions, aimed at helping older people and the wider community to improve their online skills and confidence. In addition to this, all offered some form of "Community Online Group" which focused on staying safe online and making the most of digital technologies and devices. These often provided *ad hoc* informal support, for example with filling in forms online and access to databanks. SHP1 and SHP5 described the kinds of initiatives they had in place before the pilot started:

SHP1: *We do inset computer courses which are beginner courses. Our community centres are free for tenants. We have volunteers called digital champions who basically go around to tenants' homes or public places wherever and help them with devices.*

SHP5: *Digital champion network 'techmates' targeting those offline during pandemic, up very quickly, through last 18 months-2 yrs moved into recovery & techteams assisted support in community centres & libraries,... tablet-lending library with*

unlimited data (this is massive barrier for residents), this is also for partners – project loans for community partners, they loan these to residents for sessions.

SHP1 also spoke about infrastructure developments that they implemented before the pilot project began, describing how they had previously piloted a project which involved refitting tower blocks with lower cost broadband (tenants had the opportunity to opt out). As wrap-around support, they turned a void property within the block into a temporary training/digital support hub.

Additionally, throughout the pandemic, the SHPs had been a focal point for their communities, playing an integral role in the distribution of SIM cards, devices and kit recycling schemes.

SHP4: *So, I do laptop loan schemes which is you know free equipment for tenants, free tablets for tenants. We probably have about 100 in circulation six months on they return them six months and then six months off. So, they have a six month period where they can't load it again because so we can distribute it to all our tenants. We have modified dongles that we give out free to tenants.*

Providers were at different stages of their 'digital inclusion journey' when they made the decision to take part in this pilot project. As a result, some were perhaps more developed in this than others. They were all committed to delivering the support which best met the needs of their tenants. The economic and social benefits of tenants being digitally connected was at the forefront of the providers' engagement with the pilot project.

SHP5: *If they can afford to get a connection, the wider benefits & what it means to them – link to social care, understand how to link with council rather than relying on phone, can link in with tablet lending & technical support, with tea parties, then learning what they can do online, interacting with council but also*

health; tenant struggling to contact GP & they can understand how to do this digitally; also housing – can check rent, log issues online.

Providers hoped that by being part of this pilot, learning could be shared which would help them plan future service delivery.

Situating digital inclusion within social housing provision

SHPs are ideally placed as support infrastructure to improve uptake and participation in schemes such as this pilot project. They have existing long-term relationships with local communities and are cognisant of specific tenants' needs, allowing for localised and tailored approaches to digital inclusion support. As well as providing housing, SHPs are often engaged in other activities and schemes to support tenants such as this pilot project which could become another 'business as usual' facet of delivery embedded in wider strategies around tackling poverty and social inclusion.

However, delivering such activities alongside their core work is often difficult. While SHPs were enthusiastic about the possible benefits of the pilot project and its potential positive outcomes for tenants, capacity in the social housing sector is always stretched, and our interviews came at a time when many colleagues within SHPs were also delivering initiatives in response to the cost-of-living crisis including warm hubs and community food pantries.

The complexity of their everyday work meant that SHPs valued the intervention of the GMCA social housing digital inclusion pilot. The role which GMCA took in convening the relationships with the ISPs was seen by SHPs as a keep asset, particularly by their senior teams that can influence the development of social tariffs, deployment of infrastructure (e.g. cabling) and sharing expertise.

Working in partnership

At the heart of the pilot is the partnership between public (GMCA, SHP) and private (ISP) sector partners, which to our knowledge is one of the first times this has been trialled at scale in the UK. Our interviews pointed to SHPs and ISPs having a shared understanding of the barriers for social housing tenants to digital inclusion. These included issues related to costs, infrastructure and sustainability. The issues of capacity mentioned above emerged both as a talking point in interviews with SHP stakeholders and general issues of engagement within the project as noticed by the research team.

Our discussions with colleagues from the SHPs pointed to there being no one "natural" home for issues related to DI within their organisations. This is a persistent finding across many organisations where digital inclusion, being a multifaceted issue cutting across functions, may lack a clear home. Often, it may be placed within one 'leg' or function of the organisation. In our research around GMCA, we found digital inclusion work being led from adult education, infrastructure, older persons services and tenant engagement sections. In no case was this led by a senior member of the organisation (board or senior leadership team). Colleagues were therefore required to work both up and down hierarchies and then across silos. To successfully deliver this project, colleagues needed a broad overview across their organisation's services including legal, IT, training, facilities management and tenant engagement. Lines of communication were sometimes slow as responsibility was not always clear, and messages passed through several people/ departments before reaching the appropriate person or receiving the appropriate approvals. As one of the ISPs noted (see also Section 5.3.4):

ISP1: *What typically is that the benefit of digital inclusion sits in one part of an organisation because it's going to affect your tenants and your rental pounds. The challenges sit somewhere else because asset management don't want you to poke a hole through their fire stopping and they're going do a refurb or you know, all of those challenges. There has to be gatekeepers, what you need to do is to make sure you've got all the right stakeholders in the right place, and they understand the whole picture, in order to be able to manage that benefit delivery.*

Issues of capacity also arose relating to staffing numbers. While SHPs were committed to making this pilot work, staff capacity was insufficient to allow for the development of relationships properly and fully with ISPs. The successful delivery of projects of this type is dependent on good lines of communication which determine speed of delivery and take up of interventions. Further clarity around lines of communication, both within the partnership and with tenants, required further consideration from the onset of the project. Notably, there remained the challenge of providing long-term digital support to tenants due to financial restrictions which is often fixed with sustainability remaining a key issue. Moreover, with the current cost-of-living crisis to consider, a focus must be on making fixed term contracts sustainable.

Key takeaways

- Though all the SHPs recognised the considerable importance of digital inclusion, this was just one of many pressing issues.
- Though all SHPs had someone with responsibility for digital inclusion, they were not in a significantly senior position within the organisation.
- Resourcing of digital inclusion activity was varied across the SHPs. Only in two cases did the digital inclusion lead have clear departmental resources to draw upon. In other cases, they were part-time responsibilities working up, down and across the organisation.
- SHPs' interventions appear to have been across the full range of infrastructure, skills and training support. Often these have been targeted at specific properties or tenant groups (e.g., older people, job seekers). Very often interventions have been time limited and dependent on short term or siloed funding (e.g. infrastructure, education).
- Connecting with ISPs was complex, and ISPs and SHPs may have found it challenging working across two different organisational structures and approaches.
- Throughout the project, the research team observed and noted the considerable pressures that the aftereffects of COVID-19, the cost-of-living crisis, and limited resources created for SHP partners when trying to deliver the project. It was not often the most important nor critical activity that needed to be addressed by the SHP teams.

Residents' perspectives

The other element of this study was the research team's engagement with social housing tenants. These were in the form of focus groups consisting in groups of between two and eight. To facilitate an open-ended discussion, a semi-structured interview schedule was used for these. In addition to those focus groups facilitated by the research team, SHP4 conducted their own sessions and provided feedback. Even though these sessions provide a rich seam of insights and information, overall recruitment levels were low, and some sessions were poorly attended compared to numbers invited. This was despite extensive efforts by SHPs to recruit participants., which reflects two things:

- The challenging circumstances tenants find themselves in – motivation to take time to attend a focus group session may not be very high.
- SHPs were undertaking this recruitment on top of existing challenging workloads.

During the focus groups with social housing tenants, a range of issues were discussed. These related to internet access points, reasons for using the internet, awareness of providers/social tariffs, devices, awareness of risks and confidence (digital literacy). We would note that the participants' levels of digital engagement and awareness in the focus groups appeared to the research team to be higher than the overall figures presented in Section 3 above, though many of the points made would align with the survey data.

Use of the internet

In line with Section 3 above, participants' use of the internet was mainly via phones and laptops. Key uses include examples such as online shopping, entertainment, work, utilities, social media, learning languages and searching for information. Again, in line with the survey results, participants particularly commented that the internet is very useful for social activities. For example, one participant commented that they use this for reconnecting with old friends and using forums:

FG2: *I find it very, very helpful in terms of reconnecting with old friends and stuff like that …but also things like forums…Facebook, international accessibility, and forums within, which have been invaluable.*

The focus groups found that most participants access the internet at

home, while some also access it in libraries and community centres. The majority of the participants in the focus groups had their own private space to use the internet with only a few having to use it in a communal space:

FG3: If I've got a Zoom meeting or anything like that, I just take my phone into the bedroom and do it from [there].

Broadband and mobile access

Those participants who we spoke with were mostly happy with their broadband and data packages. A key group with concerns about their internet provision were the young respondents (18-25) whose internet access was smartphone focused, and therefore, having enough data at their disposal is essential. This sometimes meant being dependent on using or sharing their relatives' data. Also, Wi-Fi access was provided either by their parents or by their landlord. Limited data for their phones meant that they rely on Wi-Fi at home for sustained smartphone use. Another way in which these young people access the internet is via specific locations that offer free Wi-Fi service (shops, cafes, and libraries at their colleges). Buses were mentioned as one of the locations where they miss having free Wi-Fi access. Many participants mentioned the adoption of strategies such as turning their data off for periods of time to conserve amounts over the month. They also reported a sense of 'disconnection' in circumstances in which they are away from home without any data or when their data runs out.

Social tariffs

Few participants knew about social tariffs, and they thought that these are inequitable as they are targeted to people on specific benefits, rather than all those on a low income:

FG2: People like myself will fall through the cracks. I'm only on benefits but I'm not on Universal Credit or anything like that. I can't go on Universal Credit because I've got money saved up.

Moreover, tenants commented that the data provided within social tariffs packages is not always sufficient for their needs. For example, the respondent below discusses the limitations of some offers:

FG2: Social tariffs, they tend to be around 50 megabytes per second.

Okay, myself, I've got, I think it's 138. Now, that wouldn't be good enough for video.

Participants also expressed concerns that value for money was about more than just the cost of their package, it was also about the quality of the product.

FG2: It's more than I need but I get 250 gigabytes with it. But once you start getting a phone of that calibre, it works out better. Right. Okay to get that put in terms of usage, I would get a contract that was less than 20 gigs.

In contrast to social tariffs, older respondents reported cases of being sold expensive 'combined' packages including multiple TV channels, landline phone services and mobile phones in excess of £100 per month. In each of these cases relatives intervened to change or challenge the contract.

Digital skills

In general, participants in the focus groups felt confident in their digital skills. However, as noted above, FG members were self-selecting in response to SHP recruitment and appeared to have engaged with digital training and support provided by the SHP. Most participants were self-taught and some had also attended some formal training:

FG2: I've learned a lot myself. Yeah, but I've done training courses.

They often learned through interaction with family (e.g., grandchildren) and friends. This reflects repeated findings in other studies where individuals' local personal networks are key to their digital literacy.[1]

FG5: I think I just gradually learned myself because it wasn't like one specific person who taught me how to use it but think combination of school, like my dad maybe pushed me in the right direction.

However, there were participants who recognised their difficulties in interacting with digital services.

FG3: I don't like computers particularly. For a start when I tried to do anything on a computer like filling out the forms, it times me out on it constantly..., it wouldn't be so bad if it actually saved it so that when you timed out, you could go back to that bit and carry on. Now you've got to start from the beginning again.

Participants also spoke about their level of confidence and how a lack of wider understanding of digital literacy can be a barrier for engaging fully with technology.

FG2: And it comes back to skills because if people say oh...pick up a computer or they get the phone, but they don't know about things like VPNs.

It is important that training is accessible to all groups in the community and that this is structured in a way that is cognizant to everyone's individual needs.

FG3: We do need to act for all groups. Different groups have different needs.

Awareness of digital service transformation

There was an awareness amongst the participants that there is a shift towards a digitalised society, and there was a risk that, without targeted support, some groups might be left behind.

FG3: A big risk for the older generation and I still think some younger people with learning disabilities are partly restricted because they've not necessarily got the vocabulary skills and reading skills, the right typing skills. We're moving more and more ... to digitalization. How can you know how they're gonna survive ... if they're going to be encouraged to try and lead some kind of independent life?

The internet also comes with risks including scams, online abuse, and internet addiction, as shown in the quote below. One participant, when questioned as to why they joined Facebook, commented that they did so due to the abuse that her daughter had experienced.

FG2: There's an element of the internet not being very safe in itself because, obviously, then people can, you know, try and either rip you off or like, you know, the scams, but also people that would abuse and every single sort of situation. But there's also the element of ... you hav[ing] the skills and the knowledge [so that] you can somehow protect yourself from it

Regarding suitability of devices, discussions indicated that participants did not always have the right device for the task they needed to do. For example, in the quote below, one participant found it very difficult to read the small text on their phone. They also mentioned that they use their laptop

for internet banking and only use their mobile phone for verification purposes.

FG2: So I'm using a phone, which I find very difficult to see the tiny text on a small device. I don't do it on the phone, but I will on the computer. Okay. So..., internet banking ...Then I get a message on the phone, just to confirm it, that it's me and then go back to the laptop.

Our discussions showed that the internet is not just necessary for accessing services but, more fundamentally, it provides individuals with an equal footing in society.

FG2: Exactly, it's an equaliser for independence. And if you've not got the starting blocks, I don't know how you would get to that independence and it being genuinely equal.

Key takeaways

The research team see the following key takeaway points from the resident interviews:

- Use of digital tools and systems was highly varied but mainly focused on some practical activities (shopping) and social activities (communication) with friends and family.

- Residents are aware of the need to engage with the use of digital technologies and the 'digital by default' shift in many areas of provision.

- There were general concerns about lack of digital skills leading to lack of access to services.

- There was limited awareness of social tariffs and considerable scepticism about them, their value and the practicalities of taking them up.

- Even though participants seemed confident of their digital skills, the research team would note that the majority of activities described by respondents would not require more than the basic elements of the government's essential digital skills framework www.gov.uk/government/publications/essential-digital-skills-framework/essential-digital-skills-framework).

ISP views

Each of the participating ISPs along with BT Openreach were interviewed about the issues, challenges and opportunities provided by the pilot project. We have identified a number of key topics within the interviews:

Motivation for being part of the pilot

Despite the challenges we will outline below, all of the ISPs were motivated to be part of the pilot:

ISP1: It is about being part of a solution to an evident problem, seeing what we can do as an organisation to support our local communities and be a good corporate citizen essentially.

ISP2: I think it was a really interesting opportunity to bring people together in a very different way and it has its challenges. But equally, it was an opportunity to think about it different[ly]. And I think even now moving forward, there's learning.

ISP3: Our day-to-day business and engagement, so understanding the space and the customers is really important to us because we're here to try and give an excellent customer experience and that's what we want to learn from engaging with the space to be able to continue to support doing that.

ISP3: [ISP3] thoroughly believes that access to the internet is a social good. It is something that enables or is the enabler to activities in life and touches on all of that very complex interactions that we have, but it basically supports education, work, learning, social activity. The business was set up to provide cost effective access (to broadband)

Challenge of dealing with the breadth of the organisation

All the ISPs noted that delivering the pilot and similar interventions in the UK created challenges in working across the organisation. Many different departments had to come together to deliver support. It was necessary to link up such things as:

- Physical provision of broadband or SIMs
- Customer services to engage with tenants
- Corporate social responsibility to engage GMCA or SHPs or arrange volunteers for tenant training sessions
- Finance to address tariff levels
- Legal advice to address such things a wayleaves

As was noted about SHPs' engagement with the pilots, this was complex additional work for already busy teams. As some ISPs noted:

ISP1: I have somebody on the ground because I live in Manchester to make

sure that we're engaging here in the North West because a lot of my corporate affairs team are based in London for obvious reasons, because they have to, the regulator room, political Westminster stuff down there, but they need somebody doing that kind of engagement up here.

ISP1: if you imagine me being the person speaking externally, there's loads of internal teams behind me who are working at the process.

ISP2: I need to have agreement from my networks team to make donation of connectivity and my logistics team in order to physically send out SIMs and it needs to sit within the strategy that I have in my team, that's external affairs and sustainability,

As with the SHPs' digital inclusion work, though important, is not always central to 'business as usual' within the organisation and was in nearly all cases tied to aspects of corporate social responsibility. As with the SHPs, unless there is a strong steer from very senior leads this complex coordination up, down, and across 'silos' is very challenging. As one of the ISPs noted:

ISP3: Originally [we] had some of the director of digital involved from the offset but actually because she was so high level the sort of message didn't trickle down into the different stakeholders and delivery team.

Physical and legal issues

All the ISPs who were delivering physical infrastructure (e.g., broadband to specific locations, buildings) highlighted the multiple complexities that are both material and legal. They noted many issues about installing broadband in multi-occupancy buildings such as sets of low-rise flats and tower blocks as well as older or substantially repurposed buildings. This could include everything from asbestos to fire regulations, and all noted the challenge to gaining all necessary wayleaves. As two different ISPs noted:

ISP1: From our point of view, each building in advance is surveyed, reviewed and if, it is an age pre 2000, there are quite stringent conditions on asbestos that are required. We have to survey for asbestos, do safety checks and sign off all the relevant legal consents that we need to be able to work in a safe environment. That's expensive. But on top of that, we then need to secure a wayleave.

ISP4: One of the biggest challenges we face in the UK is actually access to multi dwelling units, whether that be

1   Yates, S.J., Carmi, E., (2023), "Citizens' networks of digital and data literacy", in McDougall, J., Fowler-Watt, K., (eds.), *Palgrave Handbook of Media Misinformation*, New York: Palgrave McMillan.

through social housing or commercial provision. We tend to get slightly more traction, whether it is social housing related, because there's a need and a desire to improve the services [… for] those either vulnerable people or people that are residing … [there].

Importantly, the ISPs were aware that these issues were prevalent in the social housing sector:

ISP4: *The focus for us is really on that. It's about driving the maximum level of connectivity. And I would say the housing portfolio we have is not the easiest portfolio that we could have got out of all the mix. It is not the easiest buildings to navigate. They're certainly not new buildings, they're quite old. From a cost point perspective, costs are quite significant for any commercial provider to manage. I think from a pilot point of view it's interesting, but there are cost points that we have to consider in the mix as well.*

Working with the SHPs and GMCA

All the ISPs noted issues and challenges working with the SHPs. They clearly articulated this in terms of a 'contrast' in working cultures and available resources. The ISPs all noted that they found the SHPs decision making and implementation processes much slower than they were used to dealing with. This was not raised as a criticism but as a realisation that they were working with lower resourced organisations with their own significant and complex challenges. As several ISPs noted:

ISP1: *I totally understand that [SHPs deal with crisis]. But then if that is going to be a barrier, then how do we get around that cause if's everyone's got a day job, haven't they? Everyone's got different priorities.*

ISP2: *I think there's probably a resourcing issue there [with the SHP] and that's not to say that they haven't done a great job. I just think that you know that that's sort of on the ground day-to-day help that's needed might not be able to be provided by [a] housing provider.*

ISP 1: *Slight frustration is that, you know, we want to do the right thing, but then it gets stuck somewhere for a few months. It then reappears, and then it gets stuck again and it's kind of this cycle.*

ISP 1: *I think two challenges really to kind of draw out really and you referenced it earlier, it's about the*

speed at which people kind of work. … I have found it little bit like walking through treacle, trying to get anything off the ground… We talk a lot and then there's not much action, if I'm being absolutely honest.

As noted in Section 5.1.3, both SHPs and ISPs highlighted how these difficulties can become more complex as different parts of each organisation seek to link up and address the various material, organisational, and legal barriers. Overall, the ISPs were very impressed with the way GMCA had brought together all parties for this pilot intervention:

ISP2: They [GMCA] were very good at pulling things together and, you know, and making things happen. I was impressed at how they set up the pilot and matched us with our housing provider and kicked all of that off and the intention that they have is really wonderful.

Pricing and value

A goal of the GMCA pilot was to see if commercially viable solutions to provision of broadband to social housing tenants could be achieved through the collaboration of SHPs, ISPs, and local/regional government. As we will note in a moment, there remain key issues of affordability for tenants. Separate from this, all the ISPs raised concerns about the potential to offer commercial/market solutions or social tariffs for this sector in the long term. Across the interviews the research team identified a background concern that was directly articulated by one ISP:

ISP2: *I think it's quite difficult, isn't it, relying upon the private sector to bridge the whole gap.*

The "gap" needing to be bridged was between, on the one hand, the ability of social housing tenants to pay for service and their ability to be regular and reliable customers for the ISPs, and, on the other hand, the prices ISPs could commercially charge, the costs of serving this customer base in terms of both its variability/unreliability and the costs of installation into the housing stock. This issue of the cost of installation emerged a number of times. Outside of the GMCA pilot, such provision is costly and may not meet "cost-benefit" requirements for the necessary investment if the likely customer base and service take up will be low, with clients being only likely to take up lower price products. As one ISP noted:

ISP4: *What doesn't seem to resonate with housing associations and*

some local authorities is that it is a commercial provision here. You have to make a return of investment on the commercial provision. They can create [this] through the processes [and] ability for me not to provide services, and I I'm not saying I have that with this specific housing group. I will say if I wasn't in a pilot, it wouldn't be the first choice that I would be building into.

Nearly all the ISPs provided some form of "social broadband" as part of their corporate social responsibility provision and activity under which this pilot work operated. More broadly, they offered social tariffs which were improved (I.e., lower price) during the pilot. That said, they noted the limits of this provision:

ISP2: *Our social broadband is sold at a loss. So, there's a limit to how much we can sell of that and how long we'll be able to do that for. But it is nonetheless out there at the moment.*

ISP1: *We operate on such tight margins because we are a value provider. That means that our options are limited.*

These commercial limits meant that getting overall corporate support for changing social tariffs and offers was challenging. Raising again the issue of having to work across multiple aspects of the organisation:

ISP1: *The other challenge that we came across, and this was an internal challenge, was, you know, we can't just create new tariffs. It's very, very complicated to do that. And so that's what led us to try and kind of change to find a solution that we could try and find to help without having to create a new tariff. It's almost looking at what is available and using if available and as opposed to trying to create a new thing.*

Identifying those able to take a social tariff

At the start of the pilot only one ISP had access to the Department for Work and Pensions (DWP) API such that they could assess tenants' rights to be awarded a social tariff. This created complexity for other ISPs who had to undertake other methods to assess eligibility. These were often complex and ISPs had to seek information from tenants who would likely deter engagement. Fortunately, during the pilot, the DWP API became available to a wider set of ISPs.

Key takeaways

The research team see the following key takeaway points from the ISP interviews:

• There are commercial limits to social tariffs.

• Social tariffs are useful but they are a "one size fits all" solution for people in complex circumstances.

• The delivery by ISPs of programmes to support social housing tenants through social tariffs, provision of broadband to housing stock, data SIMs, local support interventions such as "digital champions", and engagement with SHPs requires complex co-ordination across the whole ISP organisation sector.

• Interaction between ISPs and SHPs is further complicated by the need to link two complex organisations with multiple "silos". There are also significant differences in available time and resources as well as specific work priorities and pressures that make aligning timetables and workload difficult across these very differently focused types of organisations.

UPTAKE

Table 2 details the initial goals of the pilot in terms of tenant reach. Unfortunately, in all cases uptake of the various ISP offers was low, only rising above several hundreds in one case. ISPs noted in interview evidence that even those taking up the service were not making full use of the available data nor or broadband throughout.

A couple of ISPs reflected on why final uptake was low. As explained by one of them:

ISP1: The take up of the SIMS has been remarkably low. Perhaps it's partly because an [SHP] member of staff left. Partly it might be because there's also a little bit of scepticism, I think from residents, about taking free stuff. Maybe they don't want to swap out their SIM in their phone, maybe they think that it will cost them money in some way.

It is clear to the research team that the SHPs and ISPs put in considerable effort to make the intervention offers visible to the relevant tenants. Examples of outreach communication are presented in Appendix A.

Looking at the evidence, the research team believe that there are three main reasons for limited uptake:

- Social tariffs do not meet many tenants' needs.

- The project's main focus was on access.
- It was hard to matching offers to tenant base.

Accessing social tariffs

At the core of the GMCA pilots was a desire to explore how ISP engagement with SHPs and a review of social tariffs might lead to a market sustainable intervention to increase digital access and digital inclusion. As noted above and further unpacked below, actual uptake of the ISP offers was low. It is fair to suggest that price remains a major barrier, which is coupled with limited awareness of social tariffs as an option to support broadband or mobile data access.

A significant 51% of GMCA respondents stated that they were not interested in a social tariff, and a majority of 88.2% of those who are offline and could take a social tariff also declared that they were not interested. Those interested in a social tariff, however, are more likely to be under 36 years old and more likely to have children. Respondents were not willing to pay up to £15 for a social tariff. There was no statistically significant difference between how much people are currently paying for broadband and their interest in a social tariff. Nor was there a statistically significant difference between users of

smartphone only and other residents in their interest in a social tariff.

This fits with national UK situation with regard to social tariffs. Nationally, citizens are not aware of social tariffs and 39% of people who could claim a social tariff did not think it was aimed at them. Yet, of those who are eligible for a social tariff, 20% have had challenges paying for digital technologies or devices. However, having had these challenges does not affect attitudes to social tariffs (analysis of Ofcom Affordability data).[1] Nevertheless, nationally all income groups are struggling with the cost of digital technologies, with the least socio-economically advantaged being least confident that they can maintain payments.

Costs of social tariffs

In our survey of GMCA residents, we found that very few people who qualified for a social tariff were prepared to pay more than £15 for this. The majority of respondents were prepared to pay between £11 and £15 per month for a social tariff. However, a significant number (30%) would not be prepared to pay more than £10 per month (see Figure 9). In our focus group interviews, we noted residents had concerns about the quality and speed of social tariffs, questioning the
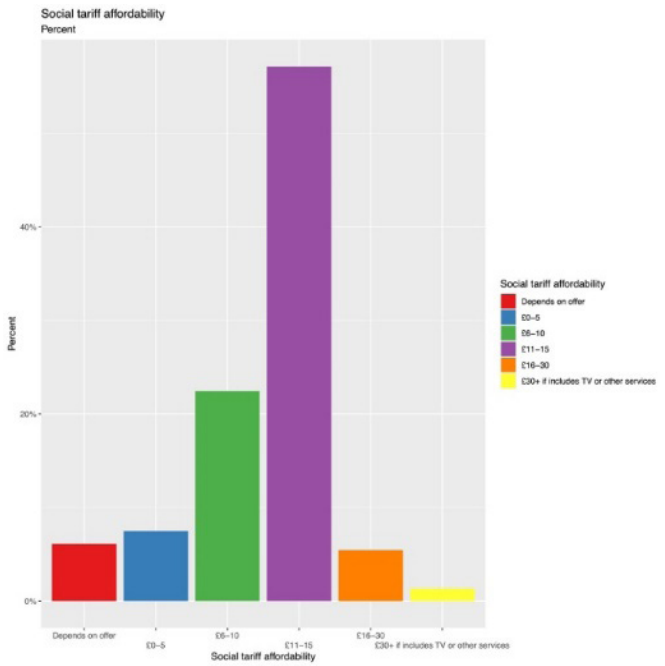
Table 2: *Intervention target and final uptake numbers*

SHP	Size of portfolio	Pilot size	Property Type	Target Group	ISP	Uptake
Bolton at Home	18,000	1,000	Multi	Mix	Hyperoptic	52
Southway Homes	6,000	1,000	Single	Young people	Vodafone	404
Stockport Homes	12,000	1,000	Multi	Mix, incl. disabled groups	BT	N/A
Wigan and Leigh Housing	22,000	1,000	Single	Unemployed groups	TalkTalk	N/A
Wythenshawe Community Housing Group	14,000	1,000	Multi	Over 75s & Care leavers	Virgin Media O2	39 (took up the offer), 136 (were supported by digital training)
TOTAL	72,000	5,000				
TOTAL IN GM	203,000					

1   https://www.ofcom.org.uk/research-and-data/multi-sector-research/affordability-tracker

Figure 9: *GMCA tenants social tariff affordability*

cost-benefit of a social tariff. There were also concerns about the complexity of the process of moving onto a social tariff and length of contract "tie-in". These results align with other work on social tariffs. The London School of Economics has used Ofcom affordability data to calculate a comparable (proportional) cost for social tariffs for those on benefits as compared to those on average incomes.[2]. They concluded that social tariffs need to be £4-£7 per month for broadband to be as affordable for households that are more socio-economically disadvantaged.

A similar conclusion is drawn in work by Promising Trouble.[3] This work found that current broadband costs for those on the lowest incomes are more than four times higher (4.7%), as a proportion of disposable income after housing, than for those in the highest income brackets (1%). For those on benefits who could claim a social tariff, the average cost of broadband services is between 3.85% and 8.41% of after-housing disposable income. Even social tariff rate cost to households on benefits remains between two and four times higher relative to higher earners. For households on benefits, social tariffs would need to fall from an average of £16.50 to £8 to be equally affordable (see Table 3).

These findings align with national research results. In multiple surveys, the costs of broadband and equipment are some of the primary reasons given for not taking up internet service alongside "No need to go online, not interested" and

the complexity of taking up a social tariff (see Section 6.1.2 below). Table 5 details the main reasons given in the Ofcom 2023 Tech Tracker survey for not taking up the internet – overall, 29% of these were about cost.

During the pilot, several of the ISPs reflected on the viability of social tariffs leading to new national offers at lower price points closer to or at £12.

Other reasons not to take up social tariffs

Other reasons given by GMCA social housing residents for not wanting a social tariff were:

1. Not interested: they do not want home internet at all.
2. They are happy with their current situation – including using only their smartphone.
3. They would want more services than those provided by basic packages.

These findings reflect both national data and insights from the ISP interviews. Nationally, in multiple surveys, the single main reason given by those offline for not taking up internet access in the next 12 months is "not interested". In the 2023 Ofcom Tech Tracker survey, of those currently offline (8% of population), 67% gave "No need to go online, not interested" as the main reason not to take up internet provision (see Table 5).

In focus groups, respondents queried the complexities of taking up a social tariff such as changing provider, changing phone number, or having to have new equipment and apps. Anecdotally, this appeared to be a potential barrier, especially for older residents. Again, this aligns with the national findings where 20% of the reasons given for not taking up the internet related to complexity or the option for others to use the internet for you (proxy use). We would argue that this concern also likely holds for switching either broadband or mobile provider.

Focus group members also queried the value of social tariffs. If the provision is at a very low level (< 30MBs) or around the national service minimum (10MBs), social tariffs may not be seen as having sufficient value to commit anything from 2% to 9% of non-housing expenditure (see Table 3 above). We would note that the deliberative consensus definition of a minimum broadband speed derived from the MDLS study is (see Section 1.4):

Sufficient reliability and speed to support all family members to access the internet at the same time.

Even though this is not a fixed number, we would argue that residents may consider internet speeds that are unable to

Table 3: *Proportion of income needed after housing costs for standard and social tariff broadband*

Household type	Standard tariff	Social tariff
Median	1.28%	n/a
Out-of-work UC claimant	8.41%	4.61%
Part-time UC claimant	3.61%	1.98%
Individual in receipt of disability benefits	6.68%	3.67%
State pension and pension credits	3.85%	2.11%
Low-income household not eligible for benefits (most will not be eligible for a social tariff)	4.74%	2.60%

2   https://blogs.lse.ac.uk/medialse/2022/09/28/social-broadband-objectives-at-risk-of-being-undermined/
3   https://www.promisingtrouble.net/blog/internet-access-a-universal-right

Table 4: *Social tariffs available in GMCA (2023) from Ofcom data*

Package	Price	Average speed	Where it is available*
Fourth Utility Social Tariff	£13.99 a month	30 Mbit/s	England
BT Home Essentials	£15 a month	Around 36 Mbit/s	UK
BT Home Essentials 2	£20 a month	Around 67 Mbit/s	UK
EE Basics	£12 a month	Up to 25 Mbit/s	UK
Grayshott Gigabit Connect	£19 a month	100 Mbit/s	England
Hyperoptic Fair Fibre 50	£15 a month	50 Mbit/s	England, Scotland, Wales
Hyperoptic Fair Fibre 150	£20 a month	150 Mbit/s	England, Scotland, Wales
NOW Broadband Basics	£20 a month	36 Mbit/s	UK
Shell Essentials Fast Broadband	£15 a month	11 Mbps	UK
Shell Essentials Fibre Broadband	£20 a month	38 Mbps	UK
Sky Broadband Basics	£20 a month	36 Mbit/s	UK
Virgin Media Essential Broadband	£12.50 a month	15 Mbit/s	UK
Virgin Media Essential Broadband Plus	£20 a month	54 Mbit/s	UK
Vodafone Fibre 1 Essentials	£12 per month	38 Mbps	UK
Vodafone Fibre 2 Essentials	£20 per month	73 Mbps	UK

Table 5: *Reasons not to take up the internet (Ofcom Tech Tracker 2023)*

Reasons why you are unlikely to get internet access at home in the next 12 months? (Multiple options could be selected)	%
"No need to go online, not interested"	69.7%
"Broadband set up costs are too high"	18.4%
"Using the internet is too complicated"	17.6%
"Someone else can go online for me if necessary"	13.5%
"Monthly cost of a fixed broadband service is too high"	12.3%
"Cost of a desktop, tablet or laptop computer to use the internet is too high"	10.7%
"Cost of a mobile phone handset to use the internet is too high"	9.0%
"Getting online getting connected to the internet is too complicated"	7.8%
"Other"	7.0%
"Monthly cost of a mobile phone service is too high"	6.1%
"Poor eyesight"	6.1%
"Concerned about security fraud privacy"	4.9%
"Happy to use the internet at work elsewhere"	4.5%
"Concerned about harmful offensive content"	1.6%
"Broadband is too slow where I live"	1.2%
"Don't have broadband where I live"	0.8%
"Don't know"	0.8%

deliver this as not being value for money. ISPs were aware that offering just the bare minimum on a social tariff might be an issue:

> **ISP5:** *The conversations that went on internally were around the fact that, okay, this is a social tariff, but it doesn't necessarily mean that what you're trying to achieve is the bare minimum of everything across the board.*

In focus groups, many respondents gave examples of internet service "dropping out" if multiple household members were using it at the same time. Our survey work indicates that those GMCA social housing tenants unable to use the internet at home report poor internet speeds and connectivity as the key issue (43%).

Project focus on access

Even though two of the interventions included providing some access to training, the overall focus of the project has been on the provision of broadband access. This is key and the base of all digital inclusion but, even though it is

necessary, it is not sufficient to support sustained digital inclusion. This finding has been a key part of the research literature briefly presented in Section 1.4. Much of the work of this project has been about getting access to residents, whether that was as complex as broadband installation into older properties or as simple as handing out a SIM card. As such, the GMCA digital pilot reported here consisted of five projects that were a "one size fits all" baseline approach in each area.

Access is, of course, most relevant to those who are offline. This group of complete non-internet users has reduced from over 20% of UK population[3] in period 2010–2013 to 8% now (see Section 3.1). As noted above in Section 3.1.6, this group now primarily consists of some of the most marginalised, older, and vulnerable groups. Even though supporting this group to access and use the internet is important, there are far larger numbers of people who are limited internet users. The major contemporary challenge is moving these citizens with intermittent access (broadband or mobile), low levels of use and limited skills into a situation where they can better engage with digital services, media, employment, and the broader "digital" society.

Reflecting on this, one of the ISPs noted greater success in targeting interventions:

> **ISP1:** *What we've learned here is that a more targeted approach is more effective. So, we've done the targeted voucher scheme through the [UK Government Department]. So that has been a scheme by the future Prosperity Fund, I think. And so it's funded by government. But it's targeted at job seekers to get them online rather than prescribing that people need to take a certain tariff. If that more targeted approach or that best practice was to be kind of extended across other government departments, that might be a better approach than a kind of one size fits all, social housing thing or social tariff or whatever.*

This point relates to motivation. Providing broadband to a previously unconnected tower block or providing a young person with data SIM may bring the internet "to their door", but it does not address any specific needs they might have. These might include a device capable of making video calls to stay in contact with relatives or skills to use devices well to gain employment. In the context of Dixon's Internet Elements (see Section 1.4, Figure 2) there may be a need to focus delivery on whichever of the "elements" tenants most need support with or are most interested to engage with. In many cases, those tenants engaging with social tariffs or free SIM offers were not those completely offline but those with existing but poor access.

Matching offers to tenant base

Following on from questions about taking a more targeted approach, we would also highlight an issue raised by both SHPs and ISPs. The initial matching of SHPs and ISPs, though not arbitrary, was driven more by aspects of location (where ISPs were working) and other organisational factors, not the appropriateness of the ISP offer to the SHP client base. For example, the initial contact at Southway Homes worked with older residents. However, the offer of a data SIM was likely more of relevance to their younger client base. It was noted that providing a combination of solutions to tenants that would have allowed them to select something more appropriate to their needs (e.g., SIM vs broadband) might have increased uptake.

Key takeaways

- Social tariffs do not meet the financial nor contextual needs of many tenants at current price point.

- ISPs may not, in fact will not likely be able to, bridge the gap between social tariffs currently at the £12–£20 level with social housing tenants' ability to afford service, which may be closer to £4–£8.

- Social tariffs are only available to groups on key benefits many other low-income social housing tenants cannot take these up.

- Reasons for low uptake are multi-faceted but cost, complexity, contract worries, and "value for money" may be key factors.

- Targeted interventions addressing specific tenant needs (e.g., employability, access to health, access to friends and family) may be more effective than broad access interventions.

- Ensuring access remains key.

OTHER KEY LEARNING AND REFLECTIONS

Reflecting on the overall findings and results, the research team would highlight the following issues.

The importance of digital inclusion to SHPs

Digital inclusion is a key issue for SHPs. The benefits of addressing this issue among tenants is well noted by SHPs involved in this pilot. However, while there is the will to act, SHPs are limited by a lack of dedicated officers whose role would be to coordinate organisational response to digital inclusion, including asset management, data security and sharing, tenant engagement.

The ambition of the pilot

Even though target uptake numbers were not reached, this was an exploratory learning pilot achieving both extensive insight and helping to drive forwards policy in GMCA and nationally. The pilot operated an ambitious multi-layered public and private sector structure which did produce benefits for tenants. Partners reported good relationships were in place across the pilot but issues regarding a lack of connectivity between public and private sector systems and legislative frameworks were reported. Going forward, it would be useful to consider having discussions between partners, local and national government to establish standard working practices/agreements prior to activity commencing.

Centrality and limits of what ISPs can do

The ISPs have been an active partner in the development and delivery of this pilot, working flexibly to accommodate issues with housing stock and developing tariffs. However, it needs to be understood that, as these are commercial organisations, there is a limit to which they can provide lower cost services while maintaining their own financial viability. Central and Regional Government need to

consider the gap between what these organisations provide and what actions and funding are required to promote digital inclusion.

Diversity of SHP tenants

The digital inclusion training needs of SHP tenants are diverse and the question of how best to meet these needs requires some careful consideration as the training needed should be about not just employability but also how to be a "digital citizen" in a "digital society".

Bridging the value gap, bringing in other sector partners

There is a question as to where the "value" of supporting social housing tenants to be online sits. This pilot has mainly focused on the direct value to tenants, the secondary value to ISPs of having new clients, and the more distributed value to SHPs and local government of tenants using digital services. There are others who also gain value from tenants being online. Healthcare services benefit as tenants may utilise online as opposed to in-person systems and support. Key government departments (NHS, DWP, etc.) gain from having a digitally enabled client base. The research team would therefore question why the onus has been on the ISPs to bring social tariffs closer to tenants' affordability threshold or to undertake the expense of fitting supply to complex housing. There may be an argument for cross public and private sector work – bringing together all parties who may benefit – to bridge this "value divide".

CONCLUSIONS

In discussion with GMCA colleagues, we have identified the following key summary comments and recommendations.

Key learning

1. **Social tariffs on their own do not work.** At over £10 they are not affordable for people on benefits, drawing upon findings from the University of Liverpool and others, which used the national average baseline. If 1.3% of disposable income, the level other households spend on digital access, was applied for those on Universal Credit, a more affordable tariff would be £4–£5 or £7 for part time workers. This is well below the minimum tariff that is commercially viable for internet service providers.

   Recommendation:
   Radical intervention is needed to avoid those on benefits having to make a choice between food, heating, and access to digital services. Intervention options include provision of "near free" baseline Wi-Fi connectivity that is available to tenants on benefit across social housing portfolios or much lower social tariffs.

2. **The commercial value/margins for ISPs from social housing tenants is not as high as other tenures.** This means that SHPs need to make it as attractive as possible if gaps in connectivity coverage, which are still a problem in some social housing areas, are to be addressed.

   Recommendations:
   Reduce costs of market investment, as far as possible, through:

   a. Securing agreement of standardised wayleaves and specification across social housing in GM. This will both speed up commercial rollout (as the legal costs of wayleaves are high) and the lack of modern infrastructure in multi-home housing blocks and tower blocks. A draft agreement has now been produced by three ISPs and four SHPs as a starting point for wider agreement.

   b. Increase take-up of digital services by aggregating tenant demand through partnerships with ISPs with joint branding, which will increase trust. ISPs can support this through connecting community hubs to attract new customers and through supporting skills sessions.

3. **Capacity in social housing providers is not high enough to manage the process of engagement and development of partnership working with ISPs.** There are currently few dedicated digital inclusion roles within social housing providers.

   Recommendation:
   Social housing providers should consider identifying digital inclusion leads and explore pooling expertise and resources with other SHPs to create more capacity in this important area, which will increase impact upon the life chances of their tenants and their ability to engage with all support services.

Key pilot outcomes

The GM Digital Inclusion Social Housing Pilots has achieved a series of important outcomes:

1. A rethink by several ISPs involved in the pilot about the market opportunity in providing access to social tariffs. This has resulted in a number of **new social tariff offers being made** which have since been rolled out across the UK.

2. More effective targeting on those in need of support was made possible through **industry-wide access to DWP's API** which enabled providers to target social tariff offers to tenant on benefits.

3. Identification of the key administrative barriers to market investment in connectivity in social housing – leading to the **development of a standardised bulk wayleave and specification agreement.** This will reduce administrative burden for SHPs and rollout costs for the market leading to more investment in connectivity and

social value benefits. Adoption of this approach by all GM SHPs will now be encouraged.

4. **Identification of the clearer role and opportunity for social housing providers** to be more proactive in creating mutually beneficial partnerships with ISPs which can accelerate full fibre rollout and deliver high levels of social value.

5. Provision of an important evidence base for partners on the project to **embed minimum digital standards within GM's emerging Landlords Charter**.

6. **Identification of market failure for key groups of people** within social housing (over 75s and disabled groups) that can only be addressed by external intervention.

7. **Recognition of the importance of social housing providers to have access to data to enable them to better understand who the vulnerable tenants are** within their portfolio. This will be particularly important in the context of the switch over of the public service telephone network which will be complete by 2025.

8. **Development of the following forward options for the social housing providers to consider as part of the wider rollout across the City Region:**

   - **Supportive approach** – supporting the market to address gaps in full fibre coverage and providing strong competition where tenant have a choice of infrastructure provider (not just a choice of ISP). There is the opportunity to take advantage of corporate social responsibility offers and minimise disruption and impact of capacity by using wayleave/specification agreement. This would not involve the encouragement of take up of digital services for any individual ISP by the SHP.

   - **Proactive approach** – where SHPs enter into a non-exclusive partnership with an ISP with joint branding of a range of offers

aimed at accelerating take up. The pilots demonstrated the value of the promotion of social tariffs, connection of community hubs to promote offers to tenants, essential skills support, access to devices; and possibly targeted tariffs aimed at the most vulnerable.

- **Transformational/ Disruptive approach –** where the SHP procures time-bound partnership with ISP to provide network access across portfolio to support facility management needs (e.g., damp, energy, breakdown monitoring) in ways that are potentially linked with health and social care offers. There is the potential here to derive added social value from the procure, which could include targeted provision of free network access for vulnerable tenants (as have been delivered in Rochdale).

Next steps

These pilots have created the foundations for a far more constructive and mutually beneficial relationship for social housing providers and internet service providers.

The three options for SHPs above form the basis for further discussion with ISPs, which needs to reflect the reality that every place is different. For example, those SHPs with high levels of tenant poverty may take the view that a transformational approach is needed because of high vulnerability combined with low current levels of connectivity take up. In contrast, SHPs with lower levels of benefit claimants may be able to partner with an ISP to address digital exclusion through a proactive approach because there is a greater commercial opportunity for the ISP.

The Public Switched Telephone Network switchover is a significant challenge but opportunity for social housing providers that will impact upon vulnerable tenants and many of the support services they receive. Digital exclusion makes the problem worse and therefore social housing providers will need to determine the level of risk it presents to tenants.

The pilots have proved that the market can only go so far in addressing digital exclusion in social housing. ISPs are limited by lower financial margins in social housing areas and, whilst the reduction in costs of delivery is helpful (e.g., through standardised wayleaves and specification), it does not fund significant investment in social value. This can only be achieved through a transformational approach that would

involve a procurement.

The original objective to target particular groups of people in social housing (young people, over 75s, disabled people) could not be realised because of the lack of commercial return. Public intervention is therefore needed in these areas because of proven market failure. The provision of a social tariff is not enough.

The current UK Universal Service Obligation is a misnomer because it is aimed at addressing access to connectivity (currently 10 Mbps) rather than delivering a basic minimum service, which is needed by people who are digitally excluded. This is an issue that the Government working with Ofcom should seek to address – working with the market to ensure any solution does not impact on market competition.

APPENDIX A: TENANT COMMUNICATION

Wythenshawe

ARE YOU A SOUTHWAY TENANT?

vodafone

If so, you can now claim a **FREE SIM CARD** with FREE MOBILE DATA AND CALLS FOR SIX MONTHS! No contract!

To find out more, look inside…

WHAT HAPPENS AT THE END OF THE SIX MONTHS?

You will have the option of using the sim as a pay as you go sim on a pay as you go tariff, or just discard it as there is no contract. Information on Vodafone's tariffs can be found here - **www.vodafone.co.uk/mobile/everyone-connected-bvb**

HOW DO I CLAIM MY FREE SIM CARD?

If you are a Southway tenant and would like a sim, please contact us and leave a message for our Digital Inclusion Officers, **Joe and Essie**, on **0161 448 4200**, email **connect@southwayhousing.co.uk** or visit our office between 10am and 3pm, Monday to Thursday.

vodafone   Southway Housing Trust

T / 0161 448 4200
E / connect@southwayhousing.co.uk

HOW CAN IT BE FREE?

As more and more parts of our daily lives and services move online – from booking GP appointments and managing your benefits or Southway tenant account, to everyday banking and shopping - we want as many of our tenants as possible to be able to take advantage of the digital world.

But we know some people face barriers to getting online. You might have never used the Internet before and don't know how or where to start. Or possibly can't afford the cost of paying for broadband or mobile data.

Southway Housing Trust and Vodafone have now teamed up to offer SIM cards to eligible tenants for six months for free.

This is part of a big Digital Inclusion Project for people living in social housing properties, organised by the Greater Manchester Combined Authority.

HOW DOES IT WORK?

The SIM cards will work in a mobile phone, tablet or dongle and provide 20GB of free mobile data (i.e., access to the Internet) per month, as well as free calls and texts.

IF YOU REQUIRE A DONGLE PLEASE LET US KNOW AND WE WILL BE ABLE TO PROVIDE YOU WITH ONE.

This is usually more than enough data for the average person, but you can buy more if you run out in an individual month. Streaming TV or video, for example, can use a lot of data.

WILL MY PRIVACY BE PROTECTED?

The SIMs will be 100% private and anonymous. The websites you visit and the numbers you call will not be monitored.

Researchers from Liverpool University and Vodaphone will collect some 100% anonymous statistics, such as the amount of data used and at what times of day, to assess the overall success of the project.

WHAT IF I DON'T HAVE AN INTERNET DEVICE OR KNOW HOW TO USE ONE?

In addition to the free SIM card, Southway also offers a range of other support to help people of all ages and backgrounds to get online. This includes:

Equipment Loans

Southway can loan laptops and tablets to tenants for free for six months. Internet access is also provided in the form of the new SIM card offer above, or for those who don't qualify, a MiFi device if they do not already have broadband - contact us to apply.

Help buying a computer

If you are interested in buying a computer, Southway tenants get discount at Computer Recyclers - just contact us!

Computer Courses

Our Internet Savvy course is free and can help you with everything from basic computer skills and using email to searching online for jobs and using the Southway online portal to manage your tenant account. At the end of the course, we will pay half the cost of a laptop and can advise on the cheapest way to get online. For more information contact the Digital Inclusion Officers - **Joe Sandwick** or **Essie McNally** using the details at the bottom of this leaflet to find out about the next course.

Good Connections – IT support for people over 65

Using a digital device like a smartphones, laptop or tablet can feel daunting, as you get older. Our Good Connections service offers group sessions, which focus on how to use the internet safely, how to send emails, and how to use a digital device to maintain your social connections. The sessions are relaxed and slow paced, so you have time to build confidence. We have a few tablets to loan, so you can try using a digital device before making the financial commitment to buy. For more information contact us.

Digital Champions

We offer one-to-one help with using a computer in the form of our 'Digital Champion' volunteers. If you need a little help, just let us know and we will put you in touch.

Helpful Guides

We have published a range of guides on our website covering everything from getting started online to using social media, WhatsApp and making video calls over Zoom.

vodafone   T / 0161 448 4200   E / connect@southwayhousing.co.uk   Southway Housing Trust

APPENDIX B: TENANT TRAINING

DMSI

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THE ORIGINAL

REDBRICK