NODA

Presentation to Digital Inclusion Project Board

Date: 26th September 2022

The Norfolk Office of Data & Analytics

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Insight for action

Digital Connectivity – Norfolk Coverage

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Superfast (>24 Mbps):	**96.49%**
Superfast (>=30 Mbps):	**95.89%**
Gigabit (DOCSIS 3.1 or FTTP):	**47.05%**
Full Fibre (FTTP or FTTH):	**29.32%**
Alt Net FTTP: FTTP excluding Openreach, KCOM and Virgin Media RFOG	**3.18%**
Openreach FTTP:	**27.47%**
'Fibre' partial/full at any speed: (FTTC/VDSL/G.fast/Cable/FTTP)	**99.25%**

Below 2 Mbps down:	**0.47%**
Below 10 Mbps down: (Legal USO)	**1.33%**
Below 10 Mbps, 1.2 Mbps up:	**1.70%**
Below 15 Mbps: (High Speed Broadband)	**2.45%**
Ultrafast (>100 Mbps):	**48.47%**
Virgin Media Cable:	**24.03%**
Openreach (>30 Mbps):	**94.81%**
Openreach G.fast:	**3.29%**

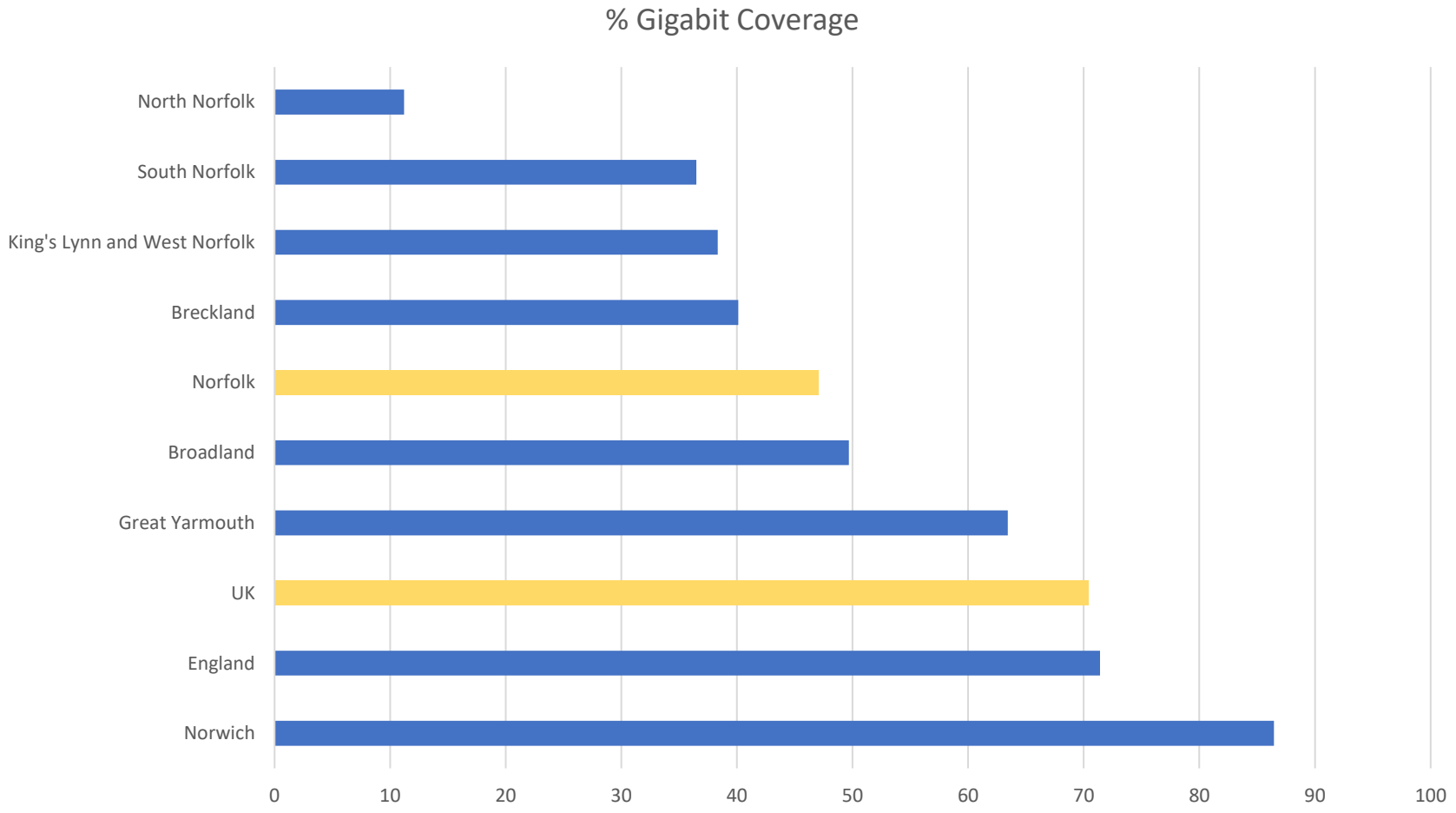
Compared with the rest of the UK, Norfolk has a comparable level of coverage for Superfast Broadband.

The percentage of premises where the internet speed is below the Universal Service Obligation (USO) is also comparable.

However, certain types of coverage in Norfolk are below the standard for the rest of the UK, chiefly Ultrafast broadband and Gigabit capable broadband.

Source: ThinkBroadband, September 2022

Digital Connectivity – Gigabit Capable Broadband



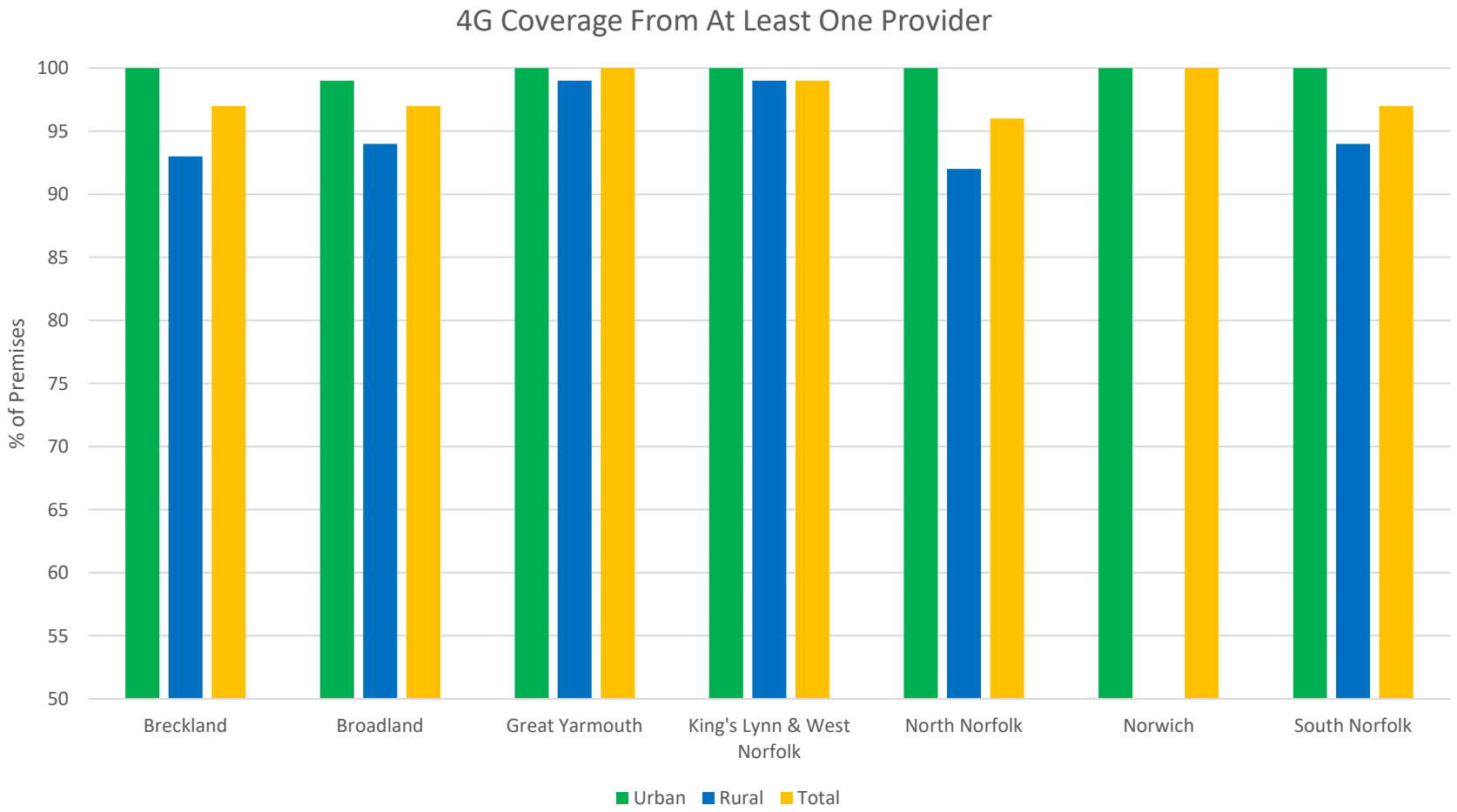
% of premises covered by gigabit capable broadband was identified as a key metric for Digital Connectivity in the Levelling Up White Paper. In this instance, % of premises covered refers to both residential and commercial premises

Gigabit capable broadband coverage in Norfolk currently falls around 23.4% behind that of the UK.

There are also noticeable disparities in coverage within the county, particularly between rural vs urban areas e.g. North Norfolk vs Norwich

Source: ThinkBroadband, September 2022

Digital Connectivity – 4G



In the UK 100% of urban premises receive 4G coverage from at least one provider. For Norfolk's districts, the proportion of urban premises covered by 4G from at least one provider is comparable.

In the UK, 96% of rural premises receive 4G coverage from at least one provider. 4 of 7 districts in Norfolk are currently below this standard.

Source: Ofcom, Connected Nations, Jan 2022

Digital Connectivity – Norfolk Performance & Usage

Area	Average download speed (Mbit/s)
Norwich	94.1
UK	**85**
Great Yarmouth	77.3
Broadland	69.4
Norfolk	**63.6**
South Norfolk	58.6
Breckland	51.1
King's Lynn & West Norfolk	48
North Norfolk	46.5

Area	Average monthly fixed data usage (GB)
Great Yarmouth	465
UK	**453**
Norwich	445
Breckland	421
King's Lynn & West Norfolk	406
Norfolk	**404.9**
Broadland	394
South Norfolk	388
North Norfolk	315

Again, this may highlight the potential disparities in performance and fixed data usage within the county.

Source: Ofcom, Connected Nations, May 2021

Digital Connectivity – Norfolk Performance

	Premises Below Universal Service Obligation	Premises Not Covered by Any Network
Breckland	960	150
Broadland	540	160
Great Yarmouth	40	8
King's Lynn & West Norfolk	490	60
North Norfolk	990	200
Norwich	2	0
South Norfolk	710	150
Norfolk	**3,700**	**730**
UK	**99,500**	**3,400**

*Please note that all figures have been rounded and therefore may not total.

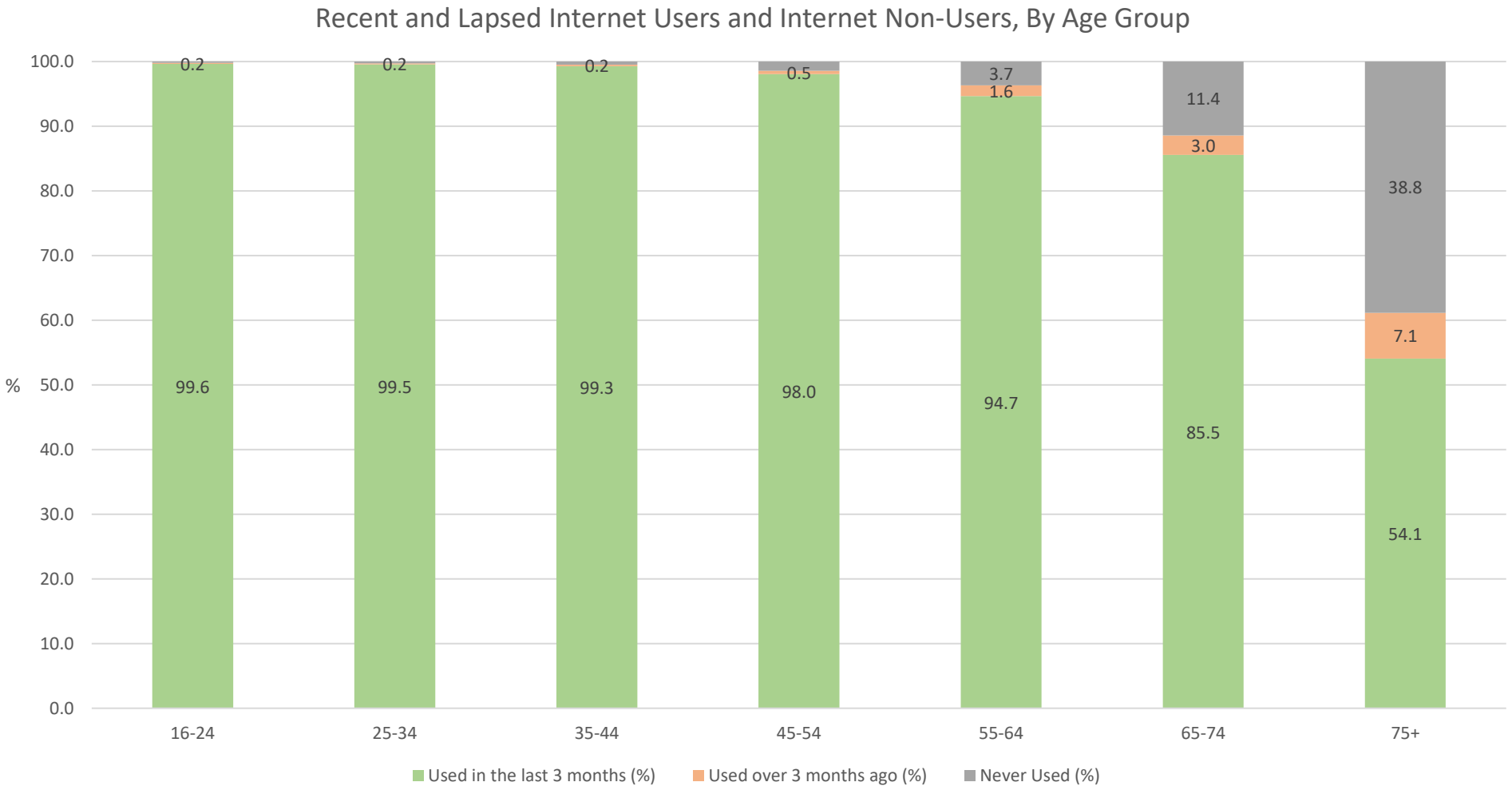
Source: Ofcom, Connected Nations, Jan 2022

The Government have defined a decent connection as one that can deliver 10 megabits per second (Mbps) download speed and 1 Mbps upload speed (along with other defined quality parameters)

The Norfolk districts with the highest number of premises receiving internet below USO are Breckland and North Norfolk.

Similarly, North Norfolk had the highest number of premises not covered by any network.

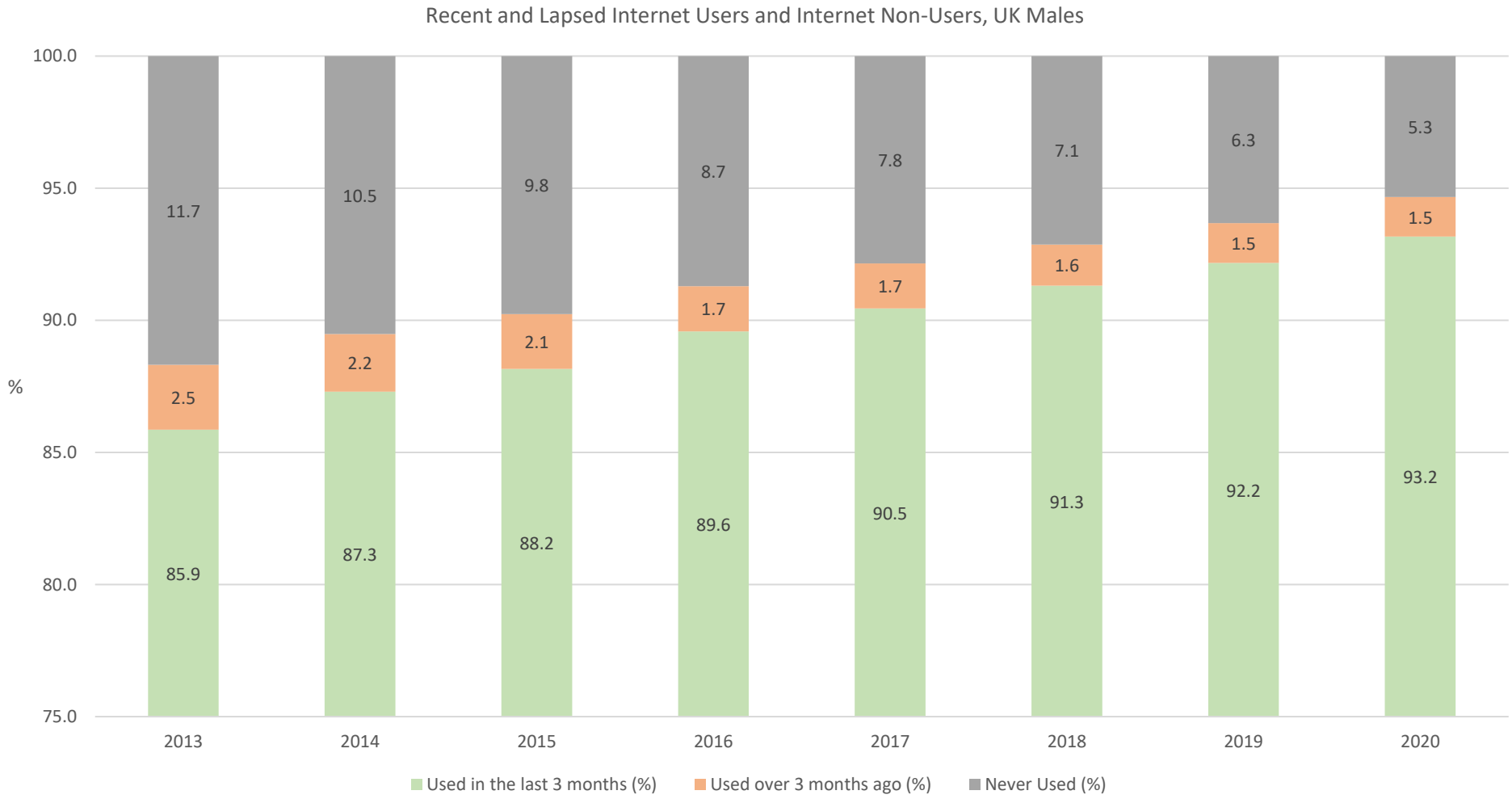
Internet Usage - UK



Internet usage decreases with age with around 85% of 65-74 year olds, and 54% of over 75 year olds reporting having used the internet in the last 3 months

Source: ONS Internet Users Survey 2020

Internet Usage – Males (UK)

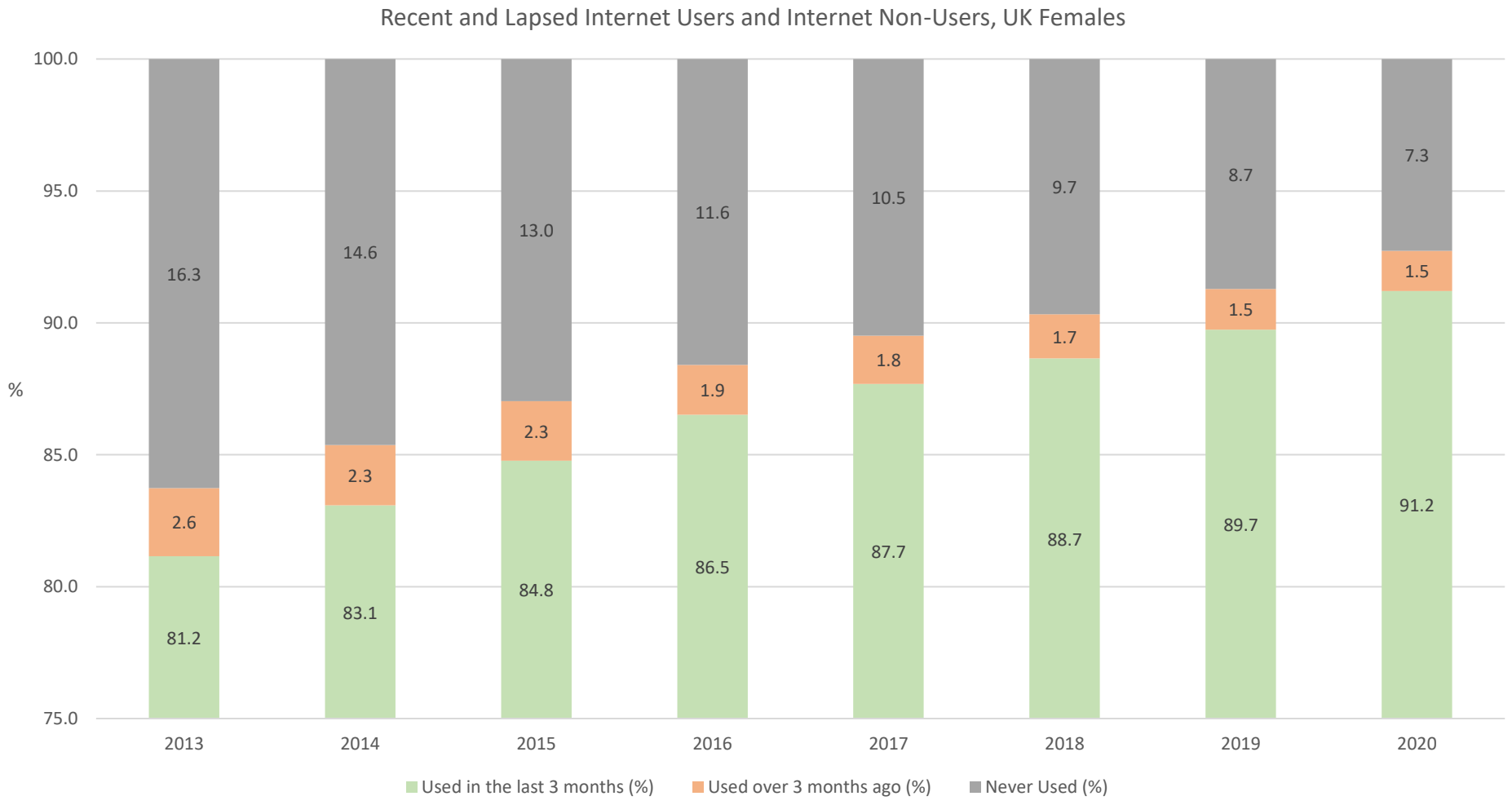


In Males across the UK, internet usage has increased each year since 2013. Overall, the number of UK Males reporting having used the internet in the last 3 months has increased by around 7.3% since 2013.

Similarly, the proportion of UK males reporting to have never used the internet has decreased by around 6.4% since 2013.

Source: ONS Internet Users Survey 2020

Internet Usage – Females (UK)



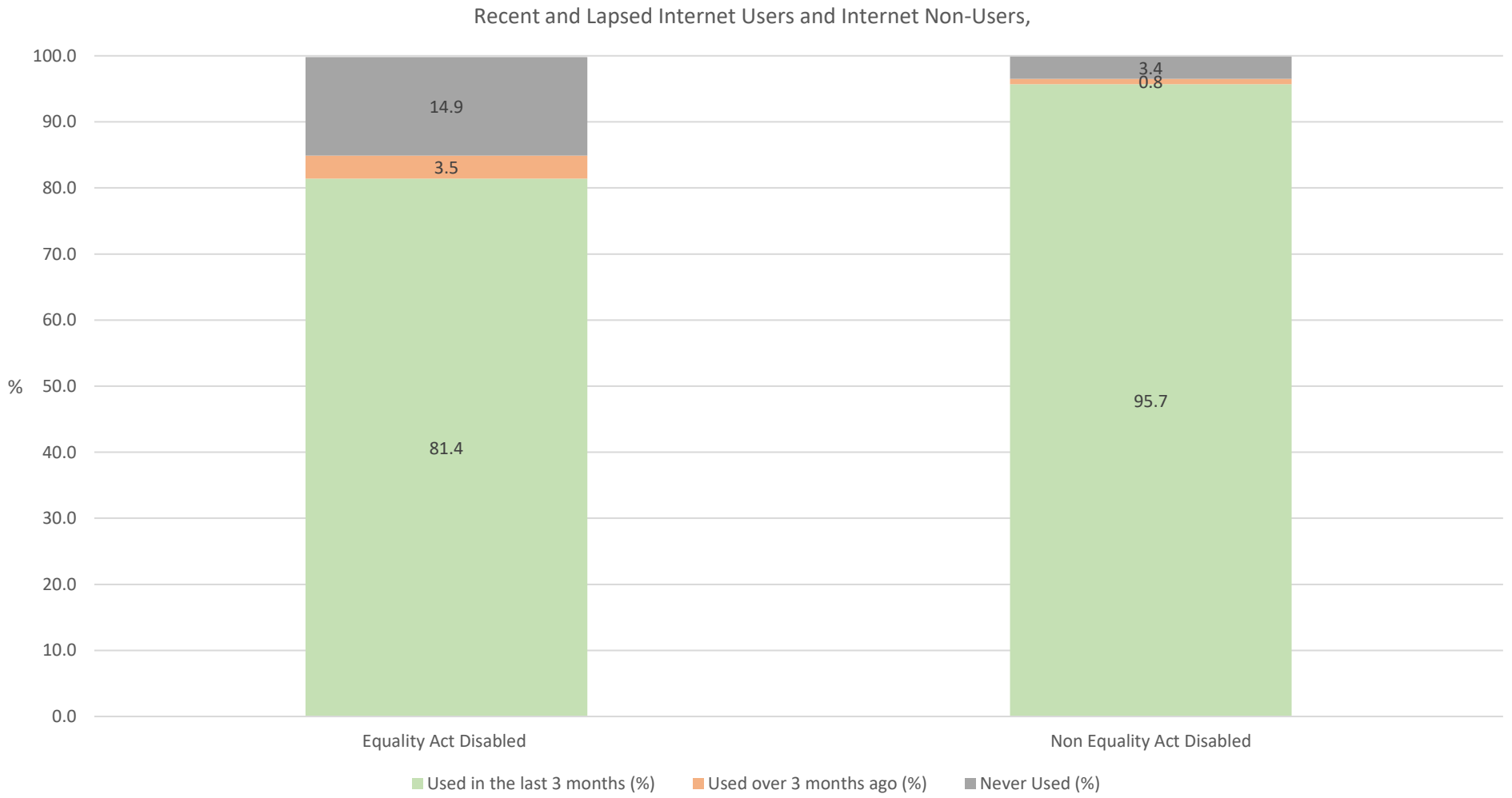
In females across the UK, internet usage has also increased each year since 2013. Overall, the number of UK females reporting having used the internet in the last 3 months has increased by around 10% since 2013.

Similarly, the proportion of UK females reporting never having used the internet has decreased by around 9% since 2013.

It should be acknowledged that internet usage among UK women is marginally lower than in men - as of 2020 internet usage was around 2% lower in female respondents.

Source: ONS Internet Users Survey 2020

Internet Usage – Disability (UK)

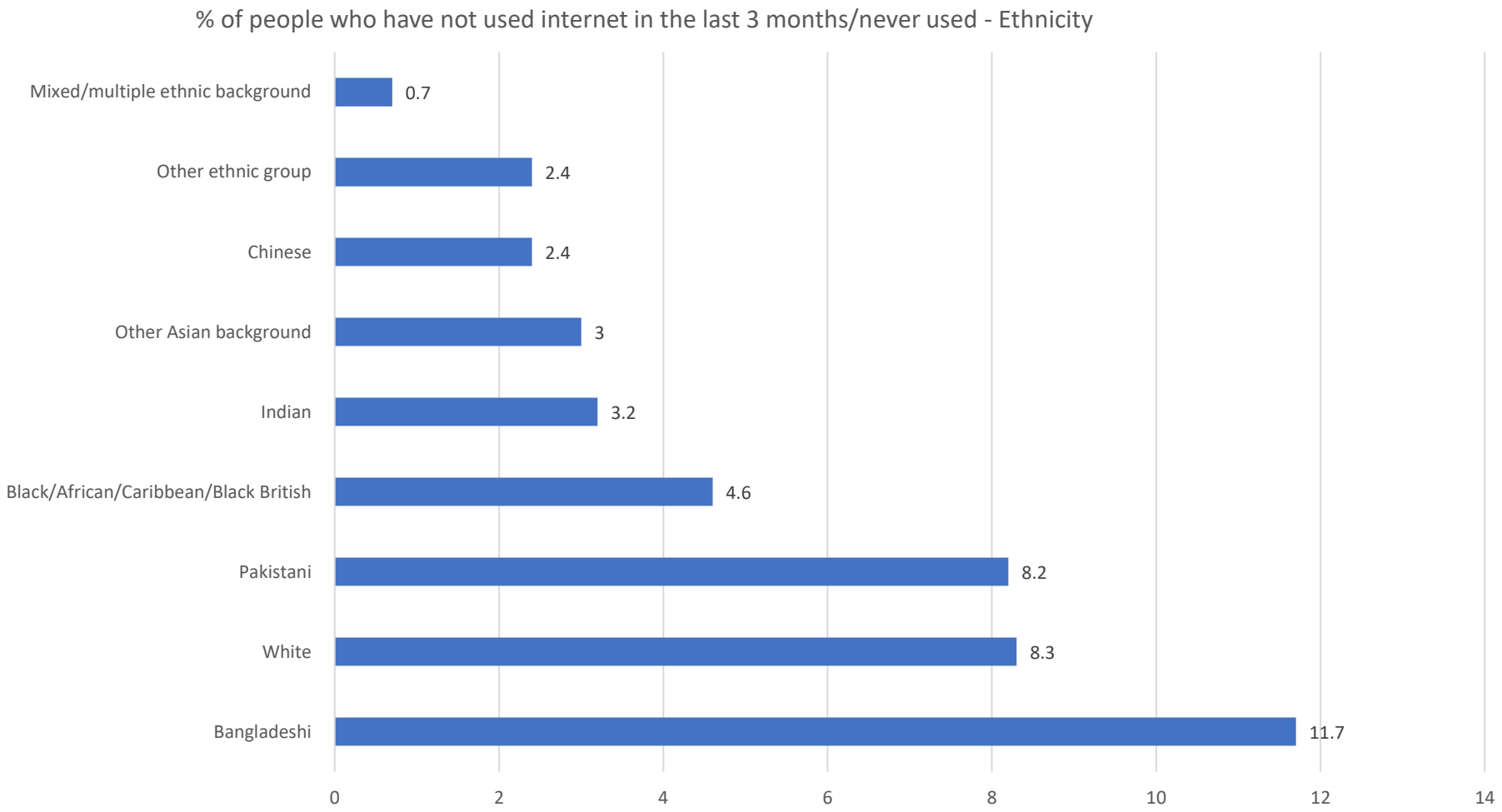


The proportion of people with a disability reporting having used the internet in the last three months is around 14.3% lower compared to those without a disability.

Similarly, the proportion of respondents with a disability reporting never having used the internet is around 11.5% greater than respondents without a disability.

Source: ONS Internet Users Survey 2020

Internet Usage – Ethnicity (UK)

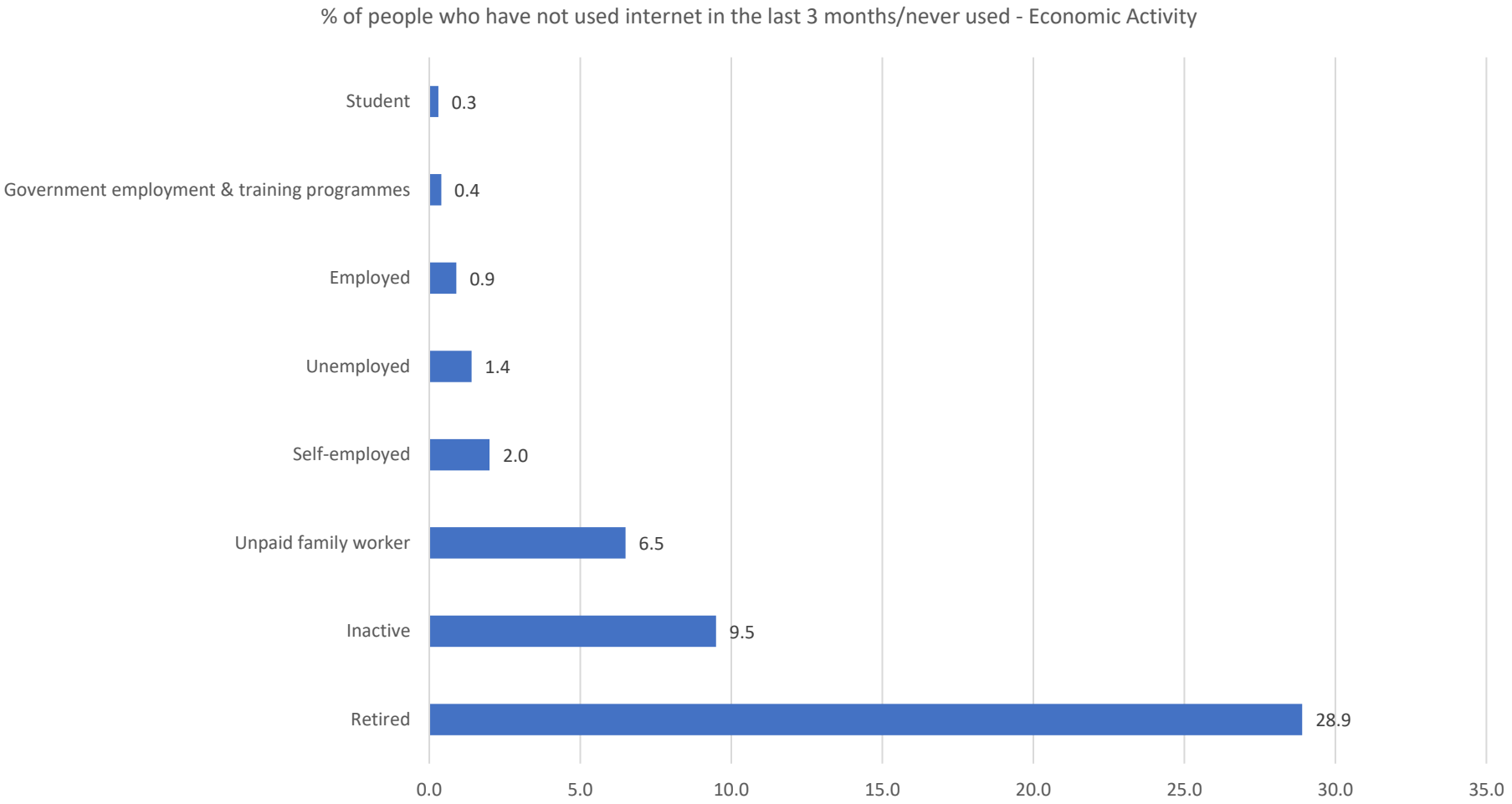


Source: ONS Internet Users Survey 2020

The ethnic group with the most significant proportion of respondents to have not used the internet in last 3 months or to have never used the internet was Bangladeshi.

Internet non-usage in this group was around 3.4% higher than in the next ranked group.

Internet Usage – Economic Activity (UK)



Retirees also reported higher internet non-usage than any other group.

The proportion of retired respondents who reported to have not used the internet in the last 3 months/never used the internet was 19.4% greater than the next ranked group.

Source: ONS Internet Users Survey 2020

Insights from Lloyds Index

- 2.6 million people in the UK are still offline
- It is now only 5% of the UK population who have not used the internet in the last 3 months
- The older the individual, the more likely they are to be digitally excluded
  - But, 10% of those offline are under the age of 50
- 55% of those offline earn less than £20,000 p/a

Source: Lloyds Consumer Index, 2021

Insights from Lloyds Index

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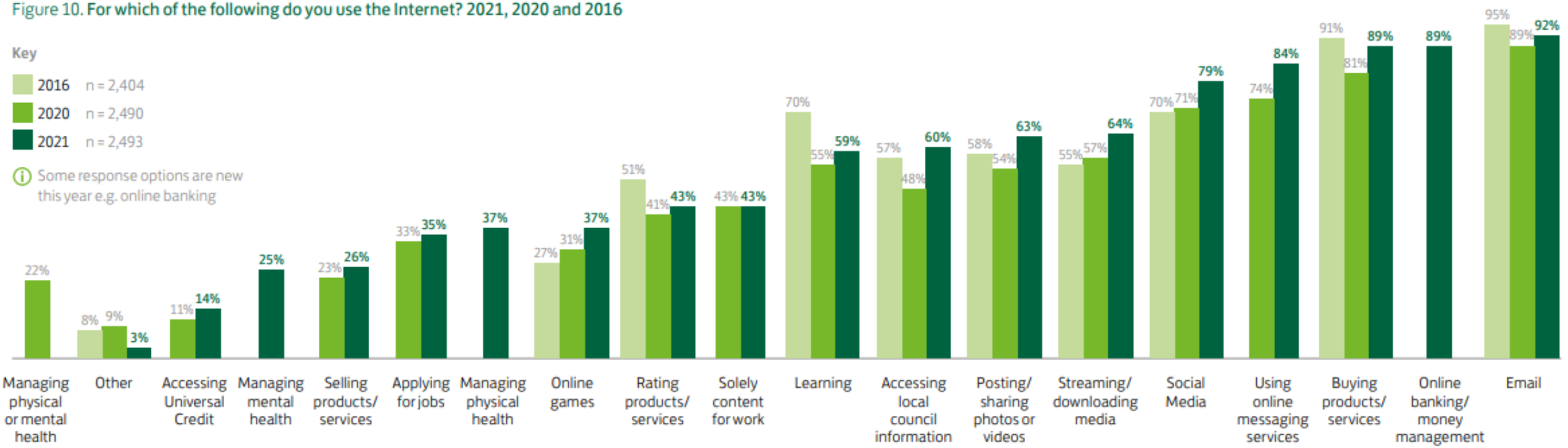
Figure 10. For which of the following do you use the Internet? 2021, 2020 and 2016



Source: Lloyds Consumer Index, 2021

Insights from Lloyds Index

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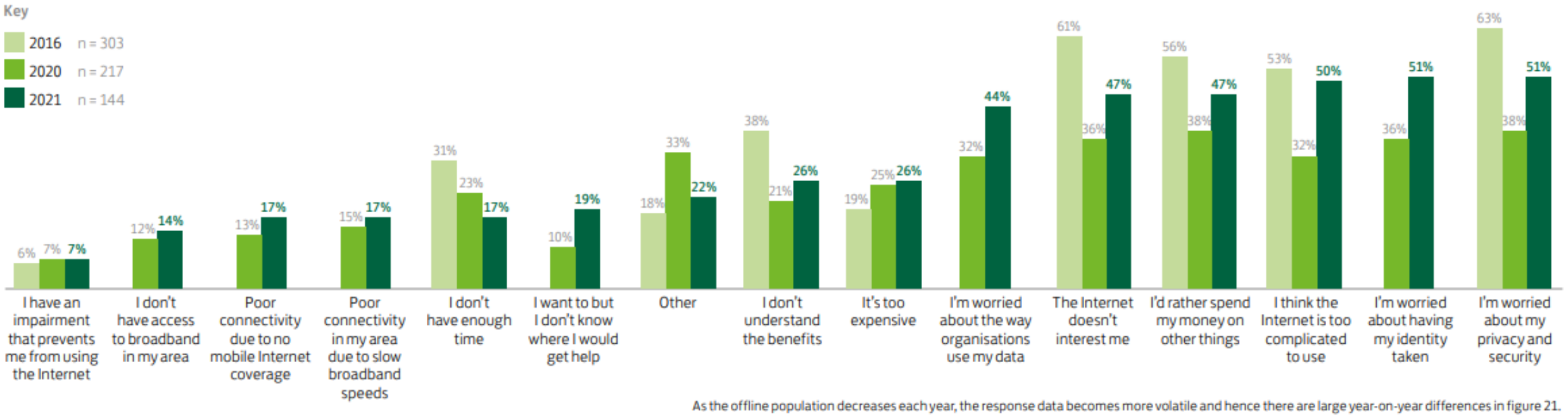
Figure 21. You have said that you have not used the Internet in the last three months. Please choose from the following options to say why you have not, 2021, 2020 and 2016



As the offline population decreases each year, the response data becomes more volatile and hence there are large year-on-year differences in figure 21.

Concerns over privacy and internet security ranked highest among respondents as reasons for not using the internet in the last three months (~51%). This was closely followed by a lack of skills (~50%).

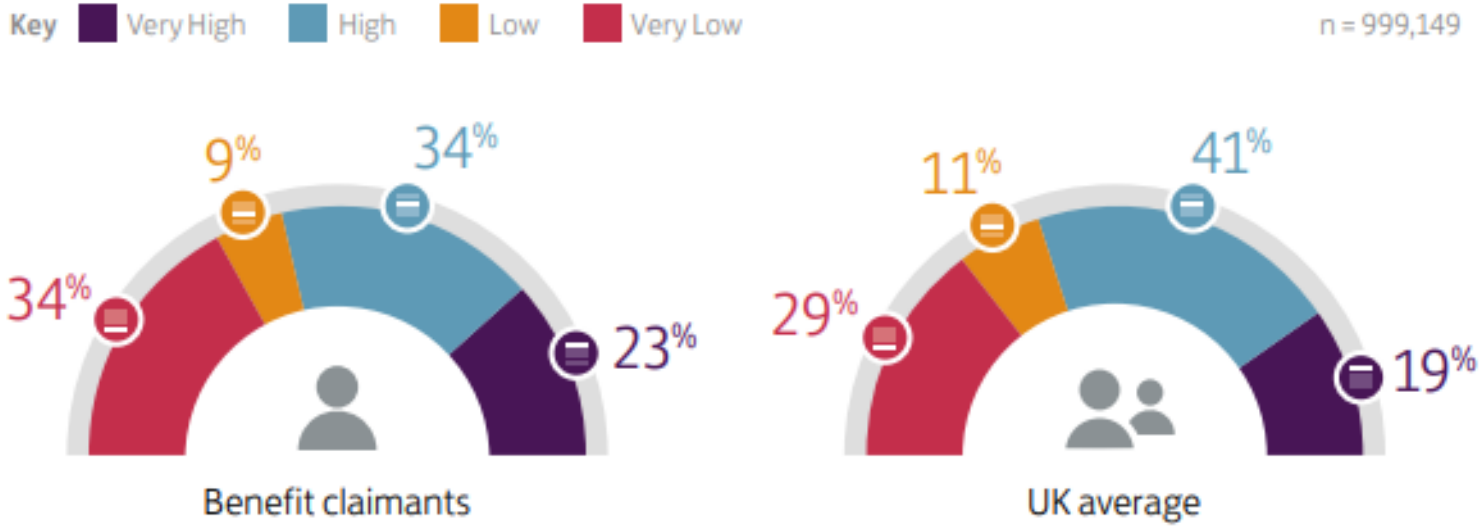
A lack of connectivity ranked relatively low by comparison (~17%)

Source: Lloyds Consumer Index, 2021

Insights from Lloyds Index

The Lloyds index categorises respondents into “Behavioural Segments” based on their “Digital Engagement Index Score”.

Figure 5. **Behavioural segmentation applied to benefit claimants, including those on Universal Credit, 2021**



Source: Lloyds Consumer Index, 2021

Benefit recipients were identified as a particularly polarising group with a higher proportion than the national average as having “very high” digital engagement (23% vs 19%)

At the same time, a greater proportion of benefit recipients were classified as having “very low” digital engagement – 34% vs 29% nationally

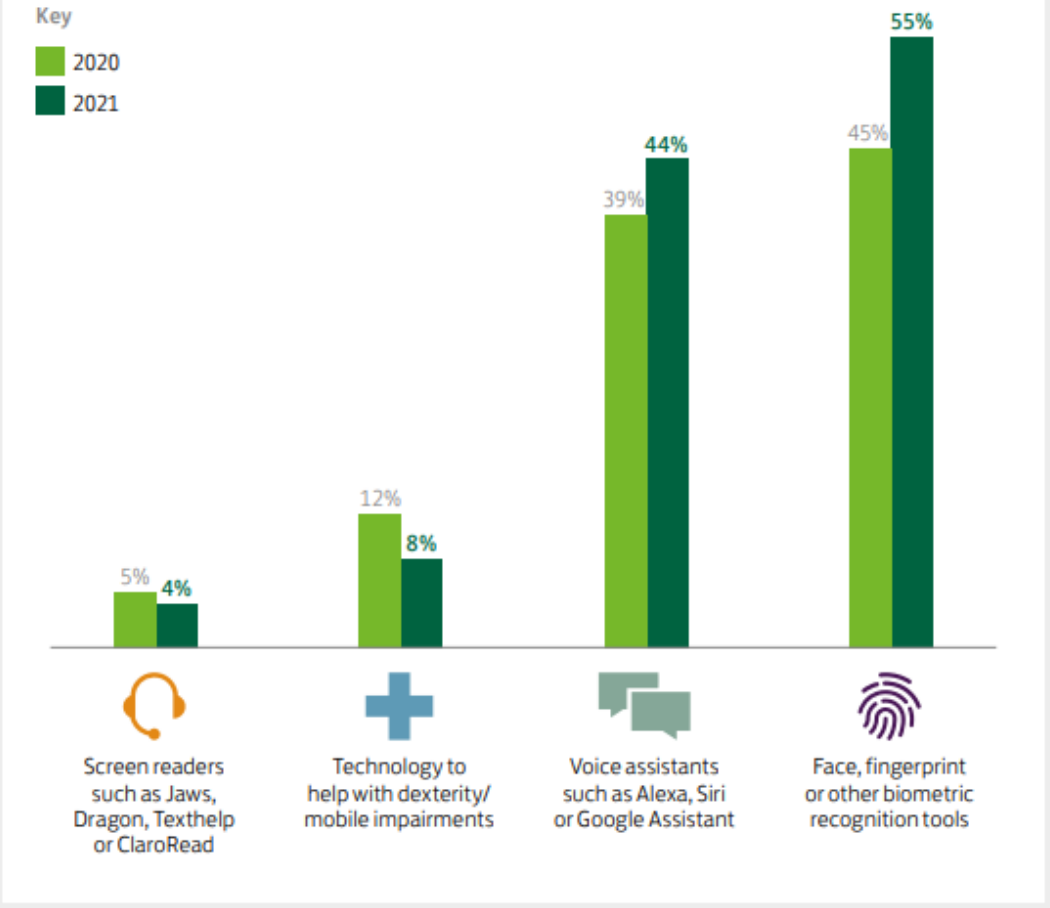
Highlights benefit claimants as a cohort that could be potentially more vulnerable to digital exclusion compared to the general population.

Insights from Lloyds Index

It was noted that while there has been an increase in the use of some assistive technology such as voice assistants and biometric recognition tools, these were more likely to be used by the “High” and “Very High” digital engagement groups.

This may highlight issues surrounding access to assistive technology for those with impairments who are less digitally engaged.

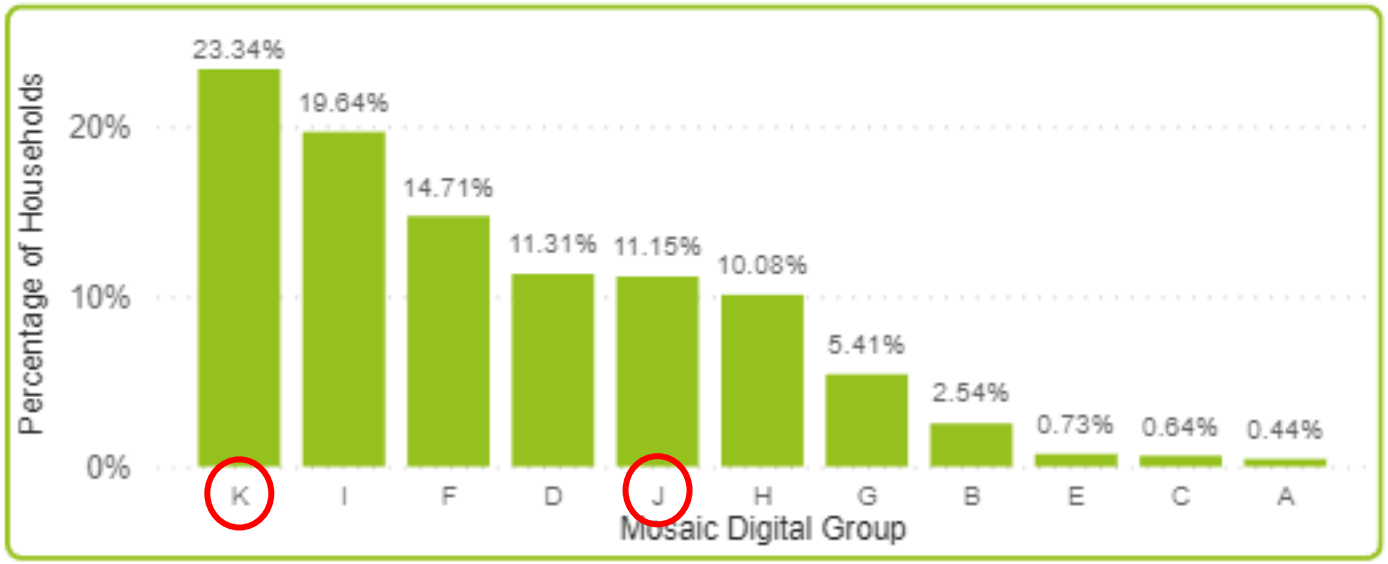
Figure 12. **Which, if any, of the following technologies do you use? 2021 and 2020** n = 2,703



Source: Lloyds Consumer Index, 2021

Insights from The Vulnerability Dashboard

Experian Digital Mosaic segments the population into 11 groups based on their online engagement and online behaviours. Groups **J and K** are considered to be digitally excluded groups.



Group J: Beyond Broadband	Group K: Tentative Elders
Remote Locations	Landline and Postal Channels Only
Intermittent Mobile Signal Coverage	Ancestry and Hobby Sites
Lowest Internet Speeds	Infrequent Internet Use
Visit Online Review Sites	Unlikely to Own Modern Devices
Likely To Use a PC	Unlikely to Use Social Networks
Traditional Contact Channels	Low Internet Competency

Source: Experian Mosaic Digital

Insights from The Vulnerability Dashboard

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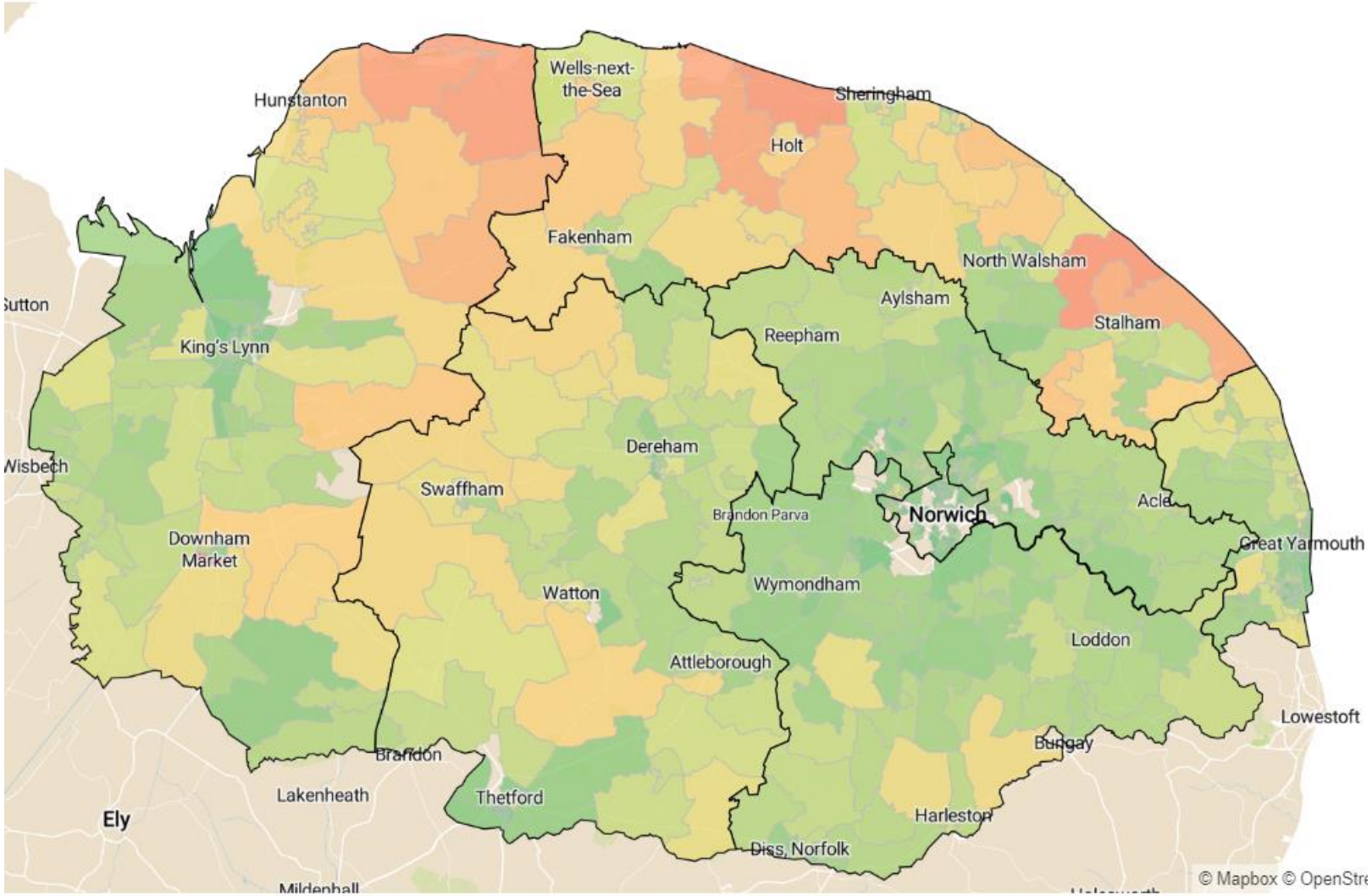
Green = Low number of households

Orange = Medium number of households

Red = High number of households

Rural and Coastal areas appear to have a higher concentration of households belonging to Mosaic groups J and K.

"Beyond Broadband" (J) and "Tentative Elders" (K)



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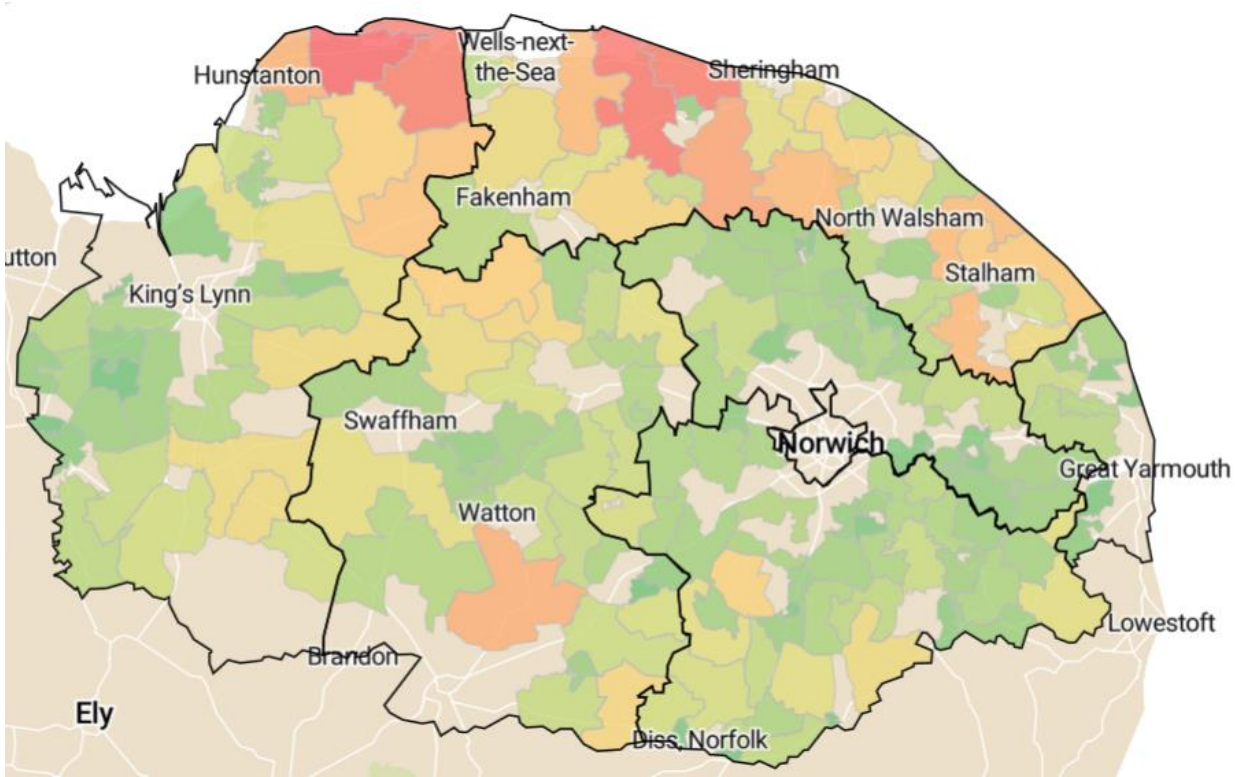
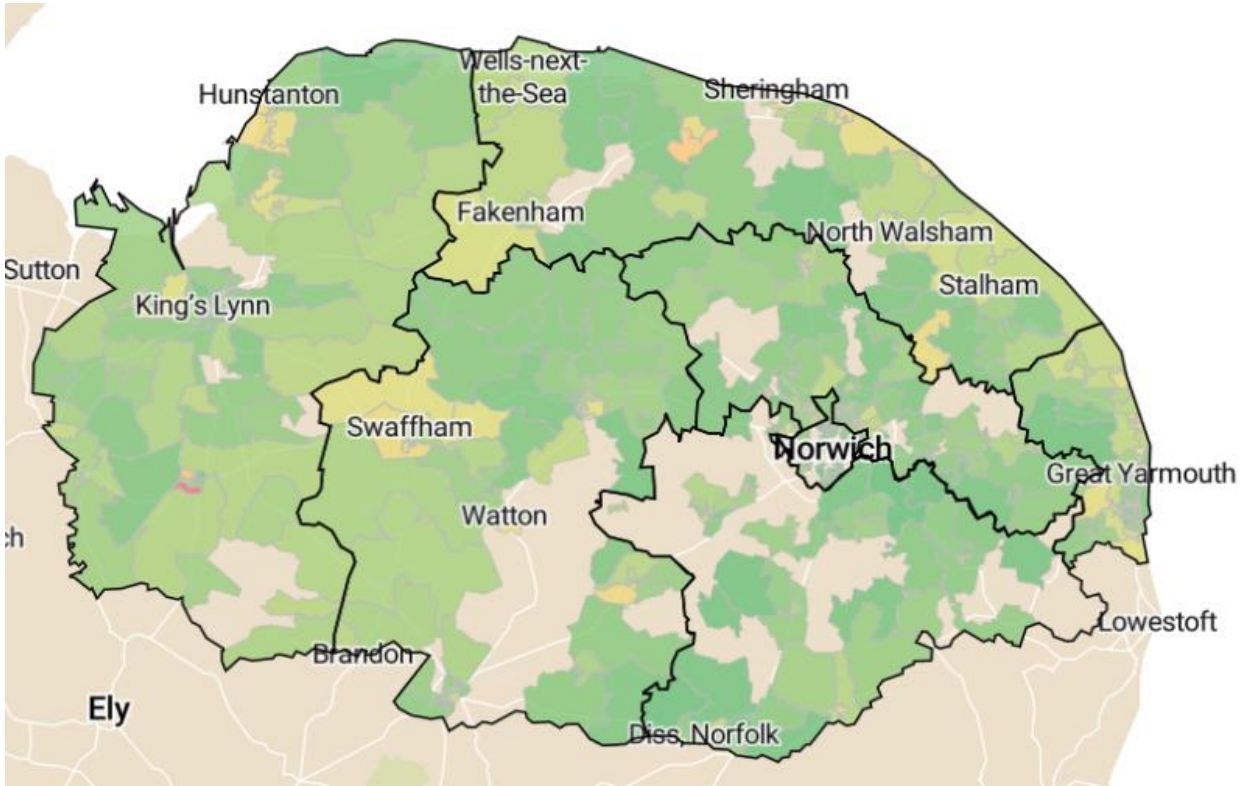
"Beyond Broadband"

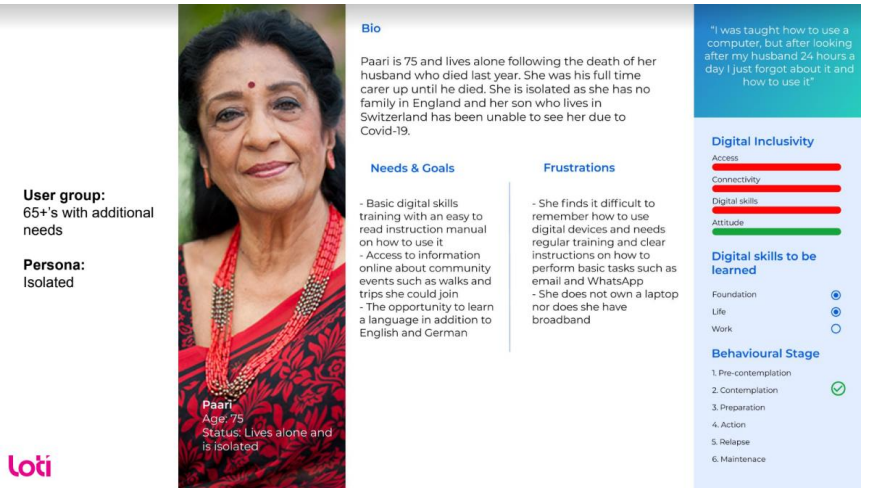


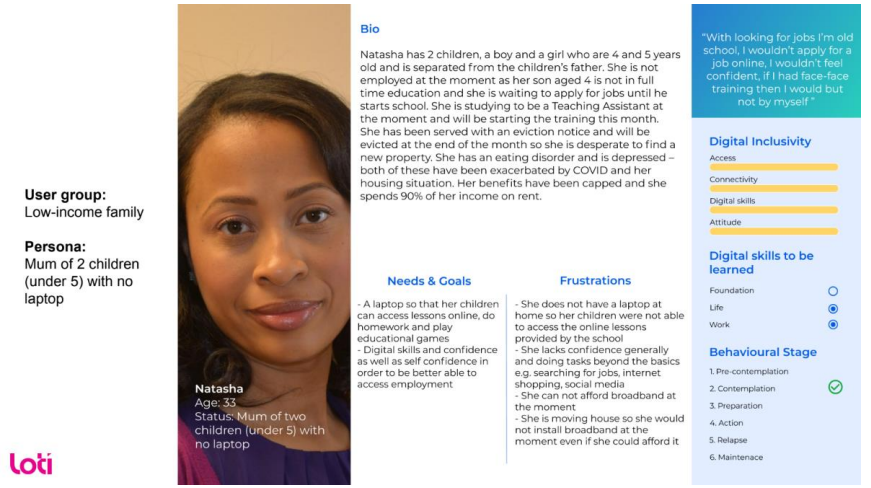
"Tentative Elders"



Digital Exclusion Personas – LOTI

- The London Office of Technology and Innovation (LOTI) have developed their own “Persona Bank” of digitally excluded individuals
- These 24 archetypes are designed to help understand the needs, experiences and barriers of people experiencing digital exclusion
- Developed from national, regional and local data to capture and identify the demographics, attitudes and behaviours of digitally excluded people
- Persona archetypes were then refined by Strategy & Intelligence and Policy teams and verified by internal service representatives





Thank you

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Questions?