



Locked out: the Smartphone Deficit



August 2018

Digital access for consumers only
using smartphones to access the
internet

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Executive Summary

In the summer of 2017, Citizens Advice Scotland undertook a paper-based survey around digital access, and over 1,200 people took part¹. We found that almost a fifth of clients never used the internet and many more lacked basic internet skills. We reported on this in the February 2018 report 'Disconnected'.

A key finding from the initial research was that, of those who do use the internet, one in five (20%) could only access the internet through their smartphone. This report looks in more detail at these consumers, analysing their characteristics and assessing their digital access and skills.

Key findings:

Younger consumers were more likely to report that their only access to the internet came through Smartphones

- For consumers aged under 45, over a quarter (27%) only accessed the internet through their Smartphone
- For 18-24 year olds who took part in the research, internet access only through a smartphone was their most common source of access
- Advisers in a focus group explained that there is often a disparity between perception and the wider understanding of internet skills, with young people very experienced in using some apps but less experienced at emails

Smartphone use was related to relative deprivation, but less so to types of urban/rural areas

- Almost a third of consumers in the most relatively deprived areas of Scotland only used smartphones to access the internet (compared to 8% of consumers in the least deprived areas)

¹ Disconnected; understanding digital inclusion and improving access (CAS, 2018): https://www.cas.org.uk/system/files/publications/cas_disconnected_report.pdf

- Consumers living in 'accessible small towns' were slightly more likely to report only using a smartphone for internet access, but this type of consumer was present in all areas of urban and rural Scotland

Smartphone only consumers used the internet and emails less often

- Almost half (49%) of consumers who were Smartphone Only accessed the internet "often", compared to three fifths (57%) of all consumers with access
- Smartphone Only consumers were less likely to say that they can use a computer 'very well' (28%)
- A third of Smartphone Only consumers 'very rarely' used emails or didn't have an email address.

Smartphone only consumers were less able to undertake basic internet tasks compared to other internet users

- Only a minority of Smartphone Only consumers reported being able to undertake basic internet tasks such as downloading and saving forms (34% compared to 47% of all those online), completing a form (34% compared to 48%) and uploading a form (24% compared to 29%)

Smartphone only consumers were more likely to report barriers to using the internet

- More than 4 in 10 smartphone only consumers indicated that costs were a barrier to them, particularly data/phone costs. This may indicate that these consumers experienced periods where they are unable to access the internet due to being unable to afford data.

The data supports the idea of **Smartphone by Circumstance** consumers, who are likely to be constrained in their choice of device by costs and other barriers, and who achieve worse digital outcomes as a result.

The implications of these findings are that some consumers are online, but in a way that significantly curtails their ability to undertake basic tasks and access essential services. These consumers are effectively on the digital fringe. These findings show the importance of public services being available to access on smartphones, as well as the continuing necessity of supporting consumers to be able to afford broadband and develop skills to use the internet.

Introduction

More and more services, public and private, are shifting greater amounts of their services, processes and information online. This impacts on consumers who use their smartphone to access the internet.

This shift is partly expressed in the form of the UK Government's 'Digital by Default' strategy, an example of which being the online-only Universal Credit state benefit. This online focussed strategy has a number of implications for those that have limited or no digital access, including those whose primary method of access to the internet is through their mobile phone. For example:

- how well some web pages are optimised for mobile viewing will greatly impact the functionality and amount of information available
- the impracticality of carrying out certain tasks on a mobile, like looking for a home/job and completing an application online
- the cost of mobile data and the anxiety of running out of mobile data
- privacy can be difficult to obtain for a number of reasons e.g. if there is limited access to the internet at home then this can create a greater reliability on free Wi-Fi in public spaces

Given the ubiquity of mobile phones across the country, the numbers of those potentially affected by a 'Digital by Default' strategy are substantial.

- **40%:** Number of internet users in Scotland that consider smartphones to be their most important device for going online²
- **66%:** Number of UK adults that say they go online via their mobile phone³

Mobile phones are fast becoming the preferred means for accessing the internet, including our own website⁴, with just under half of all traffic coming from mobile phones between August 2016 and August 2017.

² Communications Market Report: Scotland (Ofcom, 2016):

https://www.ofcom.org.uk/_data/assets/pdf_file/0024/43476/CMR_Scotland_2016.pdf

³ Internet Use and Attitudes (Ofcom, 2016):

https://www.ofcom.org.uk/_data/assets/pdf_file/0023/63950/Internet-use-and-attitudes-2016.pdf

⁴ www.cas.org.uk

This research

In the summer of 2017, Citizens Advice Scotland undertook a paper-based survey around digital access, and over 1,200 people took part⁵. The people surveyed sought advice in June 2017 from one of the 33⁶ participating Citizens Advice Bureaux in Scotland. Respondents were asked about using computers, what devices they use to go online, where they go online, their abilities to perform basic tasks such as completing electronic forms, and any barriers they faced trying to use the internet.

The findings of the survey indicated that there remain significant barriers to the digital world for a large number of bureaux clients, such as, age, location, access, cost and a lack of digital skills. The findings also suggested limitations to digital access specific to smartphone users as well as these users' reliance on such a device as a means of accessing the internet.

A key finding from the initial research was that, of those who do use the internet, 20% could *only* access the internet through their mobile phone. This report looks in more detail at the research data around these consumers, analysing their characteristics and assessing their digital access and skills.

To augment the research data, CAS also held a focus group of citizens advice bureaux advisers who have been involved in projects or issues that have involved digital access. The focus group was held in Glasgow as Ofcom data has indicated that Glasgow has a particularly high number of consumers who access the internet through a mobile phone connection. The recent increase in internet take up in the city has largely been achieved through the increased use of smartphones, which increased in use from 61% of consumers in 2015 to 85% in 2016. Smartphone take up for Scotland is 70%, lower than in Glasgow, but on a par with the rest of the UK.

⁵ Disconnected; understanding digital inclusion and improving access (CAS, 2018): https://www.cas.org.uk/system/files/publications/cas_disconnected_report.pdf

⁶ Please see Appendix 2

Smartphone Only consumers

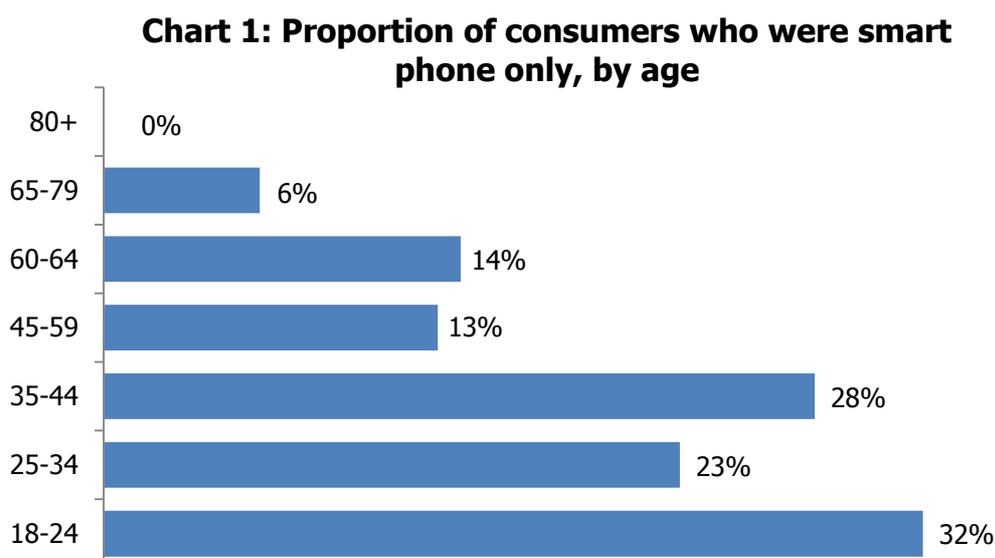
Our research identified 209 consumers - out of a sample of 1,267 consumers - whose only access to the internet came through use of their mobile phone. This equates to 16% of the sample, or 20% of those who reported that they had access to the internet.

The Smartphone Only consumers ranged across geographies, areas of high and low deprivation and across age groups. However, there were some characteristics that were more pronounced than others in this group.

Age

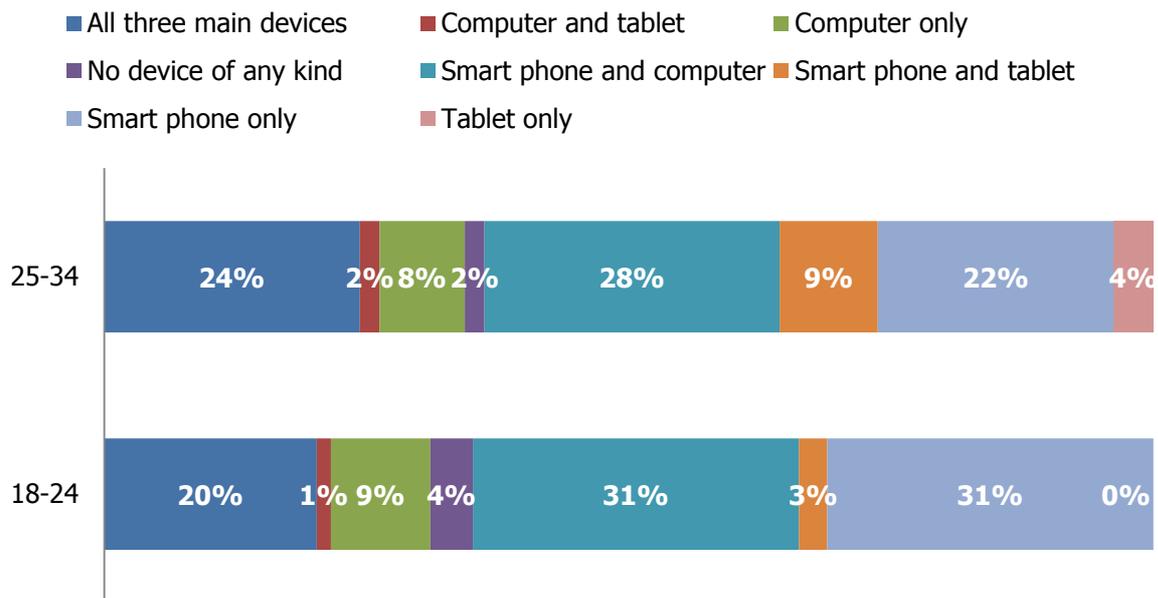
Younger consumers were more likely to report that their only access to the internet came through Smartphones, including almost a third of 18-24 year olds surveyed (n = 74) and almost a quarter of 25-34 year olds (n = 161). It should also be noted that those aged 35 to 44 were also likely to be Smartphone Only. The largest number of Smartphone Only consumers in the research was in this age bracket. For consumers aged under 45, 27% of those who had access to the internet only did so through a smartphone.

Chart 1 outlines the proportions of consumers in each age bracket who report that they only accessed the internet through their phone:



Looking in more detail at the youngest age groups in the research, Chart 2 outlines the full range of devices (and combinations) that consumers used to access the internet. The majority of those in the 18-24 age group (85%) and 25-34 age group (83%) use a smartphone to access the internet. However, many consumers lack an alternative device, with Smartphone Only being the most common internet source for the youngest age group.

Chart 2: Device by age



In our focus group of advisers in Glasgow, participants were asked about their experiences of advising younger people accessing the internet on their smartphones. The focus group reported that younger clients can be found to experience problems stemming from how they perceive their own digital skills and competence. For example, while they may be very experienced in accessing social media and using certain applications on their mobile phone, they may struggle to access an email account. The latter is often an essential skill and barrier to many online activities. This disparity between perception and the wider understanding of basic digital skills was partly explained due to limited access to computers (sometimes due to lack of availability/affordability) as well as limited experience of carrying out more complex interactions online.

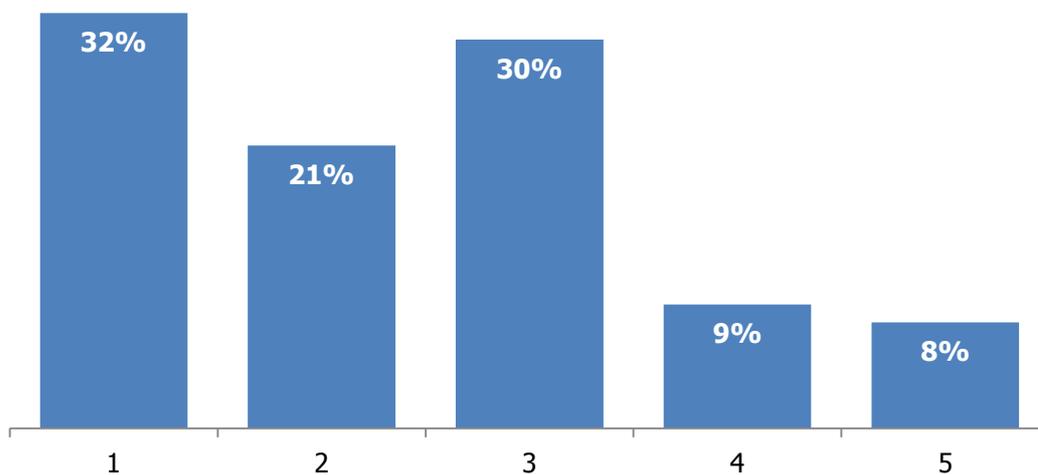
Gender

There were some differences in use of smartphones by gender. Female participants (55%) were more likely than their male counterparts (47%) to use a smartphone. However, the proportion of male and female participants who were Smartphone Only consumers was very similar (15% and 17%).

Location

The survey used postcodes to map location against areas of relative deprivation as measured by the Scottish Index of Multiple Deprivation (SIMD). Chart 3 outlines the proportion of consumers who only used smartphones for internet access by relative deprivation.

Chart 3: Smartphone Only by relative deprivation

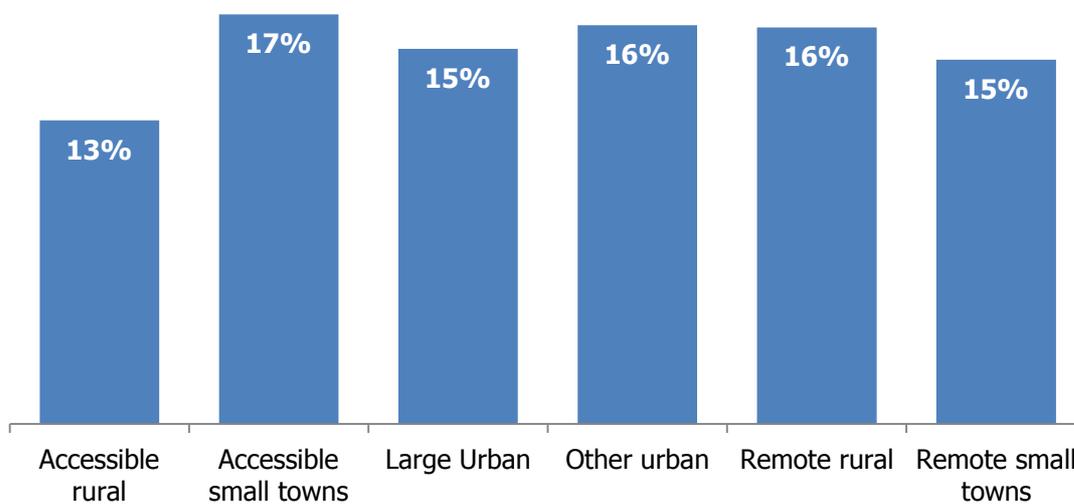


The chart shows that there is a relationship between relative deprivation and the use of a Smartphone as the only method of access to the internet. Almost a third of consumers in the most deprived areas were Smartphone Only (32%). This relationship maintained to the second and third quintiles of relative deprivation, but then dropped off significantly thereafter.

The data was collected in 19 local authorities in Scotland and there is some evidence of disparities between consumers in different local authorities. Consumers in Clackmannanshire, Glasgow, Fife and Aberdeenshire were above the average for using mobile phones to access the internet. However, the sample sized for each area was relatively small (between 40 and 100 consumers), so further research would be needed to confirm these trends.

The data is also able to show variation by urban/rural location of consumers. As can be seen in Chart 4, Smartphone Only consumers are located across different types of urban areas. However, the data show that consumers were more likely to be from 'accessible small towns' than 'accessible rural' areas. Aside from this difference, there did not appear to be significant differences between urban and rural areas in terms of consumers only using their phone to access the internet.

Chart 4: Smartphone Only by Rural/Urban classification



Use of and ability to use the internet

The research asked consumers how often they used the internet. Chart 5 outlines the use of the internet by Smartphone Only consumers compared to consumers who used any device to access the internet. Consumers who use their Smartphone as their only access to the internet were less likely to use the internet 'often' (49% compared to 57%), and more often to say they used the internet 'sometimes' (39% compared to 32%). It appears that those with Smartphone Only access the internet less often than those with other methods of access.

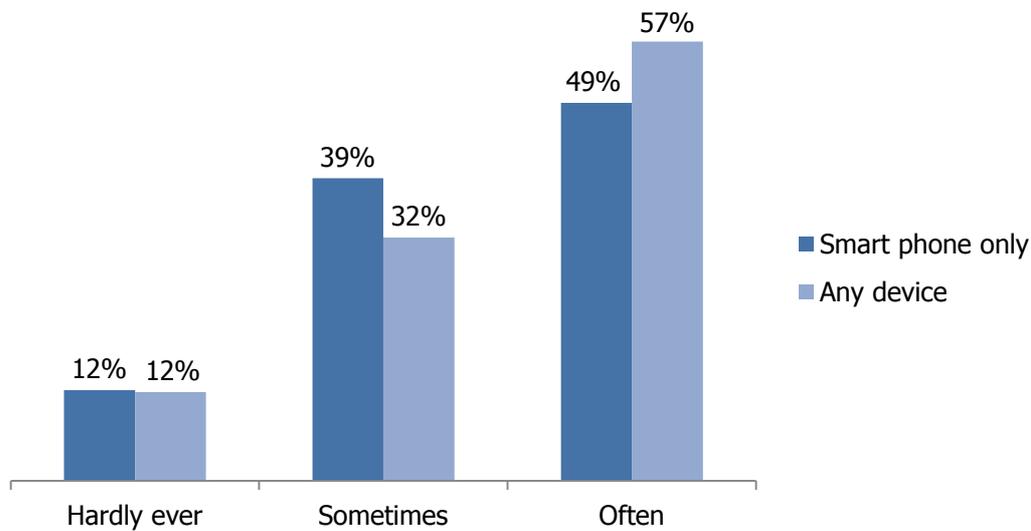
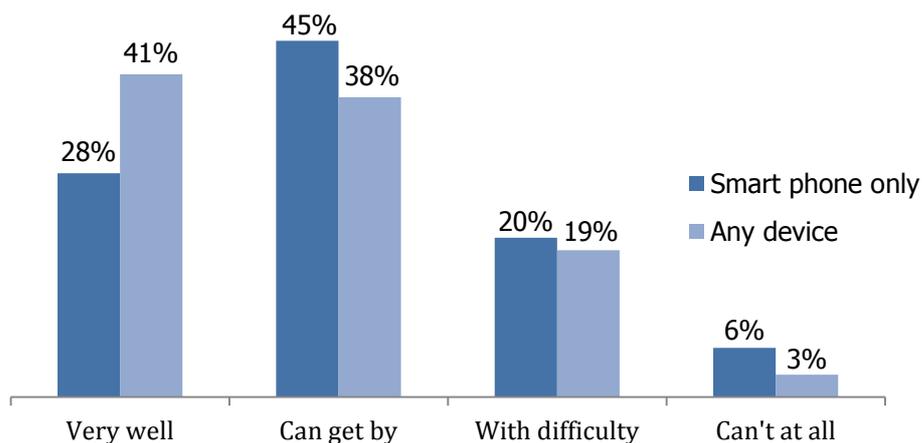
Chart 5: Use of internet

Chart 6 shows the ability to use a computer by Smartphone Only consumers and by those with access to any device to use the internet. Perhaps unsurprisingly, given that they had already reported that they did not have access to a computer, Smartphone Only consumers were less likely to say that they can use a computer 'very well' (28% compared to 41%).

Chart 6: Ability to use a computer

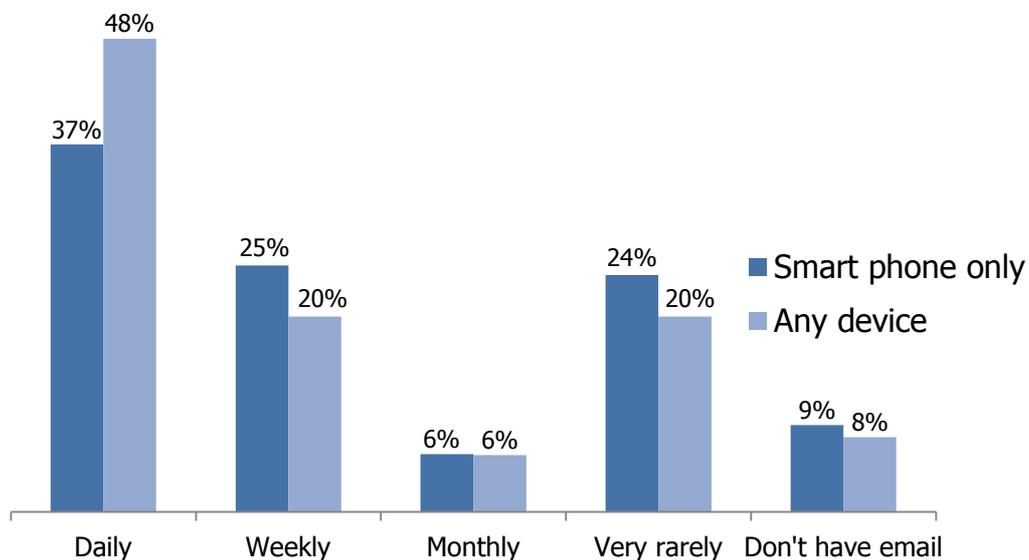
Consumers were also asked about their ability to use the internet privately. 63% of Smartphone Only consumers said that they could, while 28% said that they could sometimes. This was only a small difference from all consumers with access to the internet, with 69% of consumers saying that they could access the internet

privately. Given the potential security issues with online banking and completing forms online, it is important consumers are able to access the internet in privacy when needed.

In the focus group of advisers, it was noted that some clients appear to “feel safer” both in terms of internet security on their phones than they do using a public computer, as well as the fact an individual “owns” the phone and is familiar with using it is a factor in this. An example was given of where clients had been assisted to register for a particular service on a desktop computer but, once that was completed; they logged in separately on their phones to continue using the online service even though the desktop computer was already setup and enabled them access in the first place. This was considered to be particularly common in younger people (aged in their 20’s and younger).

The research also asked consumers about whether they had an email address and how often they used emails. Chart 7 outlines the use of email by Smartphone Only consumers compared to those with access to any device. Smartphone Only consumers were less likely to access their email ‘daily’ (37% compared to 48%) and more likely to access emails ‘very rarely’ (24% compared to 20%).

Chart 7: Use of email



Digital tasks

The research asked consumers about a range of common digital tasks that they would be required to undertake to be able to access public services, and to operate as a consumer in modern markets. The results show that Smartphone Only consumers had a lower level of capability than consumers with other methods of access to the internet. Table 1 outlines the different responses given by consumers.

Table 1: Ability to carry out digital tasks

Task	Smartphone only		Access to any device for internet	
	No problem	Not at all	No problem	Not at all
Download and save an online form	34%	25%	47%	21%
Complete form	34%	17%	48%	14%
Scan a document	22%	42%	37%	32%
Upload form	24%	33%	29%	34%
Complete a benefits application online	31%	21%	42%	17%

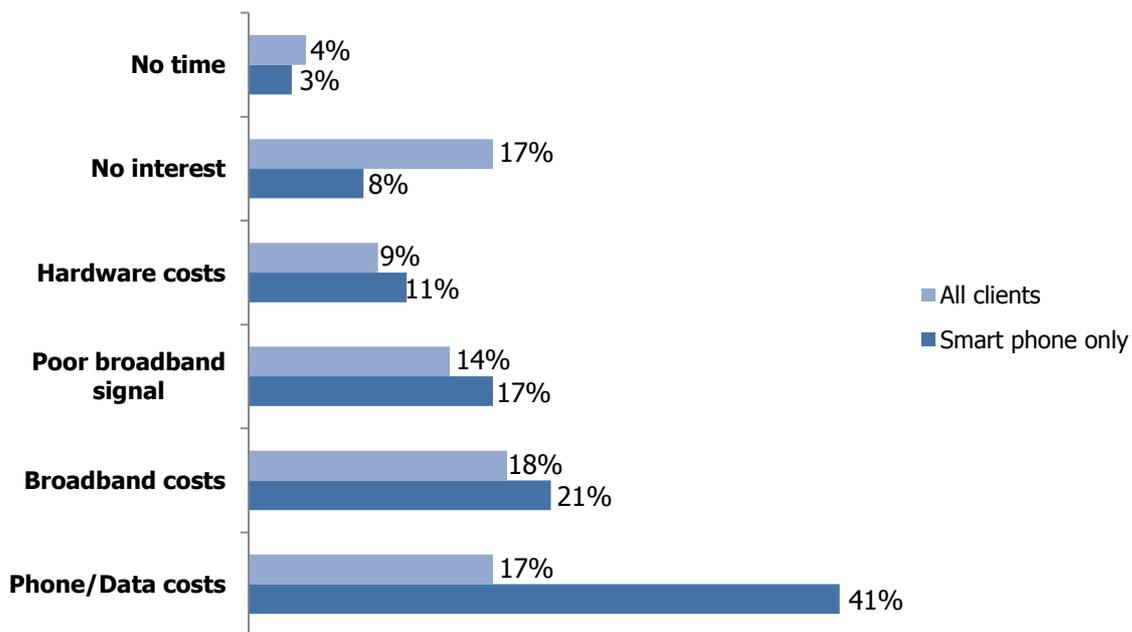
Table 1 shows that Smartphone Only consumers were less likely to report that they could carry out a task 'no problem' and more like to say 'not at all' when asked about a particular task. This applied to all common tasks that were asked about in the research. This could show two things: that the use of a smartphone prevented consumers from undertaking these tasks; and that these consumers are unable to develop these skills due to a lack of access to other online devices.

The implications of this lack of ability to perform basic online tasks are significant. Many important and even essential services – such as benefit applications, job searches, cheaper online deals – are only available to those who are able to undertake most, if not all, of the tasks listed above. The findings above suggest that only a minority of Smartphone Only consumers would be able to successfully manage these tasks without support. This means that this group of consumers are likely to be struggling to access essential services as a result.

Barriers to using the internet

The research asked consumers whether they experienced any barriers to using the internet. Chart 8 outlines the responses of Smartphone Only consumers compared to all clients surveyed in the research. It is clear from the chart that consumers using their phone for the internet experienced more barriers than other consumers.

Chart 8: Barriers to using the internet



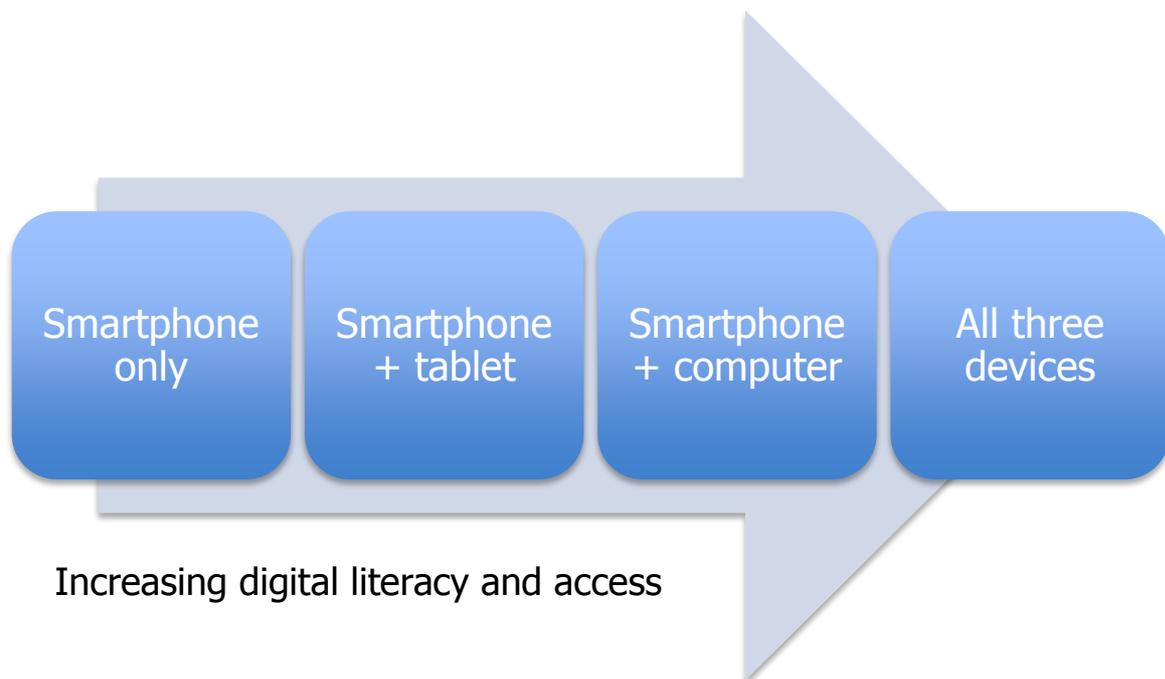
The findings show that the major barrier to using the internet for these consumers was related to cost, particularly costs for their phone. More than 4 in 10 consumers in this situation reported problems with phone/data costs. This suggests that these consumers face issues with keeping their access to the internet open, with the likelihood that costs will mean that consumers face periods where they are unable to access the internet through their phone. This could result in 'end of the month' access issues, where clients are waiting either for their data to renew or for pay/benefits to be able to top up their phone. The implication is that these consumers may be unable to respond to an online request or undertake an online task depending on their current data situation.

Smartphone Only consumers were also slightly more likely to report broadband costs, hardware costs and poor broadband signal as barriers to the internet, which suggests that these might be factors in why they only use their phone to access the internet.

Smartphone by choice or circumstance?

It is important to note that the research data supports Ofcom research that suggests there are at least two groups of smartphone users: Smartphone by Choice and Smartphone by Circumstance⁷. The first group use smartphone internet access when it suits them, often when flexible, quick, and mobile use is required. When a smartphone is not best suited to an internet task, such as an online form, this group of consumers is able to switch to a more suitable device. Smartphone by Circumstance consumers were using their smartphones because their situations (often financial) meant they were unable to access other devices.

Our data supports the Ofcom finding that Smartphone by Choice consumers were more digitally literate and engaged than those who were limited to using a smartphone through their circumstances. Across almost all questions asked in the survey, there was a digital gradient:



Across a range of measures, consumers who had access to more devices had better digital literacy and access. Interestingly, those with a smartphone and computer generally reported better access than those with a smartphone and tablet. Table 2 outlines some of these findings.

⁷ Ofcom – Digital by Default

Table 2: Digital indicators by internet devices used

	Smartphone only	Smartphone + tablet	Smartphone + computer	All three devices
Use internet often	49%	62%	73%	91%
Use emails daily	37%	60%	67%	79%
Use a computer very well	28%	45%	60%	79%
Broadband costs a barrier	21%	19%	19%	16%
Can download and save an online form 'no problem'	34%	55%	74%	88%
Complete a benefits application online 'no problem'	31%	53%	62%	76%

Table 2 clearly shows that consumers who are Smartphone Only have lower digital access and capability than consumers with access to other devices. The data appears to show that digital outcomes improve with greater access to different devices. The data supports the idea of the Smartphone by Circumstance consumers, who are likely to be constrained in their choice of device by costs and other barriers, and who achieve worse outcomes as a result.

Smartphone access to public services

More and more services, public and private, are shifting greater amounts of their services, processes and information online. This impacts on consumers who use their smartphone to access the internet. As is shown in the following cases, being a Smartphone Only consumer can have serious drawbacks when an online service is not designed for the device:

A South of Scotland CAB reports of a client who made a Housing Benefit claim on her smartphone which was then not received by the local authority. The client is struggling with rent payments and thought she had made a successful application. The bureau phoned the local authority for confirmation of the application, but was told that the council is aware that applications made using mobile phones or small tablets are not being received by them. This is not stated on the website or online form that claimants complete. This could affect the amount the client can claim, as payments can only be backdated by a month.

A North of Scotland CAB reports of a client who is using mobile credit to access his Universal Credit journal. The client regularly needs to check and update his UC journal, which he is only able to access through his phone. He is low on money and has already had to top up his mobile phone to access the journal. The client was recently made unemployed and is having to borrow money to get by.

An East of Scotland CAB reports of a 28 year old client who is experiencing technical problems trying to use the Universal Credit Jobmatch on her mobile phone. The client is writing down all her job searching activity to make sure she covers what was agreed with the Jobcentre. The client is going to try to access a computer at the local library.

The Glasgow focus group of advisers provided a number of insights into how accessing online public services through a Smartphone can be problematic for consumers.

- Website construction can also be a barrier for clients, one example of which being websites that cover too much information with a non-logical layout. These concerns were in addition to other service design issues, such as, difficulties uploading documents or other tasks involving online processes and/or applications.

- It was noted that certain services take a 'mixed' approach to access; for example, while many benefits can only be applied for online, the appeals process is carried out exclusively by phone; as such, the system is quite disjointed at times. Applications for the Social Welfare Fund were also mentioned, with this proving particularly difficult to achieve via telephone.
- Forms need to be properly optimised for mobile phone use, such as through having shorter pages. It was noted that benefits forms require a considerable amount of scrolling, saving and returning to prior pages, all of which are particularly difficult on a mobile phone due to often not being able to view a form in its full size.
- When required, uploading files was identified as one of the particular difficulties in completing benefits forms online. The 'solution' offered by the DWP is to take a photograph of the required document, but this still assumes an individual will have an appropriate phone, the knowledge to use it and enough data available to send photos.
- Raising a claim in the Sheriff Court for £5,000 or less under simple procedure rules, provides an illustrative example of the range of difficulties that mobile phone users could be faced with when accessing an online public service. The simple procedure claim form runs for eleven pages before any information is entered by the user, and the forms include text boxes where parties need to input fairly large sections of text to explain the relevant circumstances of their case to the Court. In addition to the forms themselves, prudent parties may seek to refer to the legislation which sets out the procedural rules and standardised forms, which come to over 200 pages when printed.
- Screen size can dictate to the user how much of a document they can view at a time, often meaning that only a portion of a single page of a document can be viewed at any one time. Keyboards on smartphones are designed to input small amounts of text at a time; they are not optimised like a full sized keyboard to input large volumes of text over a sustained period of time which could be very likely with the simple procedure online. As one survey respondent reported:

"I can access [the internet] easily on my phone, but if I have to fill in forms etc. I'm not confident that I can do this properly."

Policy implications and concluding remarks

The findings from this research indicate that there is a significant minority of consumers who use a smartphone as their only method of accessing the internet. Our findings show that these consumers are likely to be under the age of 45, are more likely to live in relatively deprived areas, and live in both urban and rural areas. Their responses to the survey show that they use the internet and emails less often than other connected consumers, and lack the ability to undertake basic internet tasks. They are also much more likely to report barriers to internet access.

The implications of these findings are that some consumers are online, but in a way that significantly curtails their ability to undertake basic tasks and access essential services. Qualitative evidence from the Glasgow focus group indicated that use of smartphones may be leading consumers to believe they are digitally competent but find themselves struggling when it comes to more conventional, desktop-based digital skills expected from many online public services; especially those skills that do not lend themselves particularly well to mobile phones, such as, printing and viewing documents online. These consumers – Smartphone by Circumstance - are effectively on the digital fringe. Supporting these consumers to access other internet devices would be likely to increase their digital access and capability.

However, another way to look at this is to consider whether public services and commercial websites are set up to support this group of consumers. Where online services are important or essential – such as applying for a job or benefits – it could be argued that they should be accessible by smartphone. Ofcom data has already shown the majority of consumers consider smartphones to be their most important device for going online, which is likely to increase as smartphone ownership increases. Designing services for the smartphone format would promote digital inclusion for consumers on the digital fringe.

Appendix 1

Citizens Advice Scotland (CAS) would like to acknowledge all the time and effort provided by the staff and volunteers across the 33 Citizens Advice Bureaux who helped survey people for this report:

Aberdeen CAB	Edinburgh CAB
Airdrie CAB	Grangemouth & Bo'ness CAB
Bridgeton CAB	Greater Pollok CAB
Castlemilk CAB	Hamilton CAB
Citizens Advice and Rights Fife	Inverness, Badenoch & Strathspey CAB
Central Borders CAB	Maryhill and Possilpark CAB
Clackmannanshire CAB	Moray CAB
Clydesdale CAB	Motherwell & Wishaw CAB
Dalkeith & District CAB	North and West Sutherland CAB
Denny and Dunipace CAB	Peebles & District CAB
Drumchapel CAB	Penicuik CAB
Dumfries and Galloway Citizens Advice	Perth CAB
East and Central Sutherland CAB	Roxburgh and Berwickshire CAB
East Ayrshire CAB	Skye and Lochalsh CAB
East Dunbartonshire CAB	South West Aberdeenshire CAB and
Easterhouse CAB	Stirling CAB.
East Kilbride CAB	

Citizens Advice Scotland would also like to thank the survey respondents who took the time to tell us about their ability to access and use online content.

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