

# Ofcom Consumer Panel Research Quantitative Research Findings

## Focus on people with a disability






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April 2005

## Report outline

- This report compares the findings for residential consumers with a disability with those for residential consumers in the **UK overall**
  - these consumers answering ‘Yes’ to the question ‘*Do you have any long-term illness, health problem or disability which limits your daily activity or the work you can do?*’
- Differences shown of  $\pm 5\%$  (where based on all respondents) are statistically significant
- Where findings for people with a disability are significantly different from the UK average this has been shown using green and red arrows
  - to indicate significantly higher or lower measures for people with a disability
- Unweighted base sizes are shown throughout the report to illustrate the number of respondents interviewed

## Profile of groups of interest by nation

Figures in **bold** indicate where the incidences of a group is significantly higher than for the UK as a whole or in comparison to other nations in the UK. Final row and final column indicate the number of interviews conducted for the Consumer Panel survey.

	England 	Scotland 	Wales 	Northern Ireland 	UK TOTAL 	<b>INTERVIEWS CONDUCTED</b>
Older people (aged 65 plus)	16%	16%	18%	14%	16%	<b>461</b>
Rural	13%	13%	<b>19%</b>	<b>55%</b>	15%	<b>398</b>
Non-white	<b>7%</b>	1%	2%	1%	6%	<b>331</b>
Limiting long term illness/ disability	14%	<b>18%</b>	<b>29%</b>	15%	15%	<b>488</b>
<b>TOTAL NATION SPLIT</b>	<b>84%</b>	<b>9%</b>	<b>5%</b>	<b>2%</b>	<b>100%</b>	
<b>INTERVIEWS CONDUCTED</b>	<b>1398</b>	<b>426</b>	<b>352</b>	<b>343</b>	<b>2519</b>	

## Summary of key findings for people with a disability compared to UK

### *Understanding*

- Less likely to have heard the terms broadband, digital TV, digital radio and 3G
- Less likely to understand the term digital switchover

### *Keeping informed*

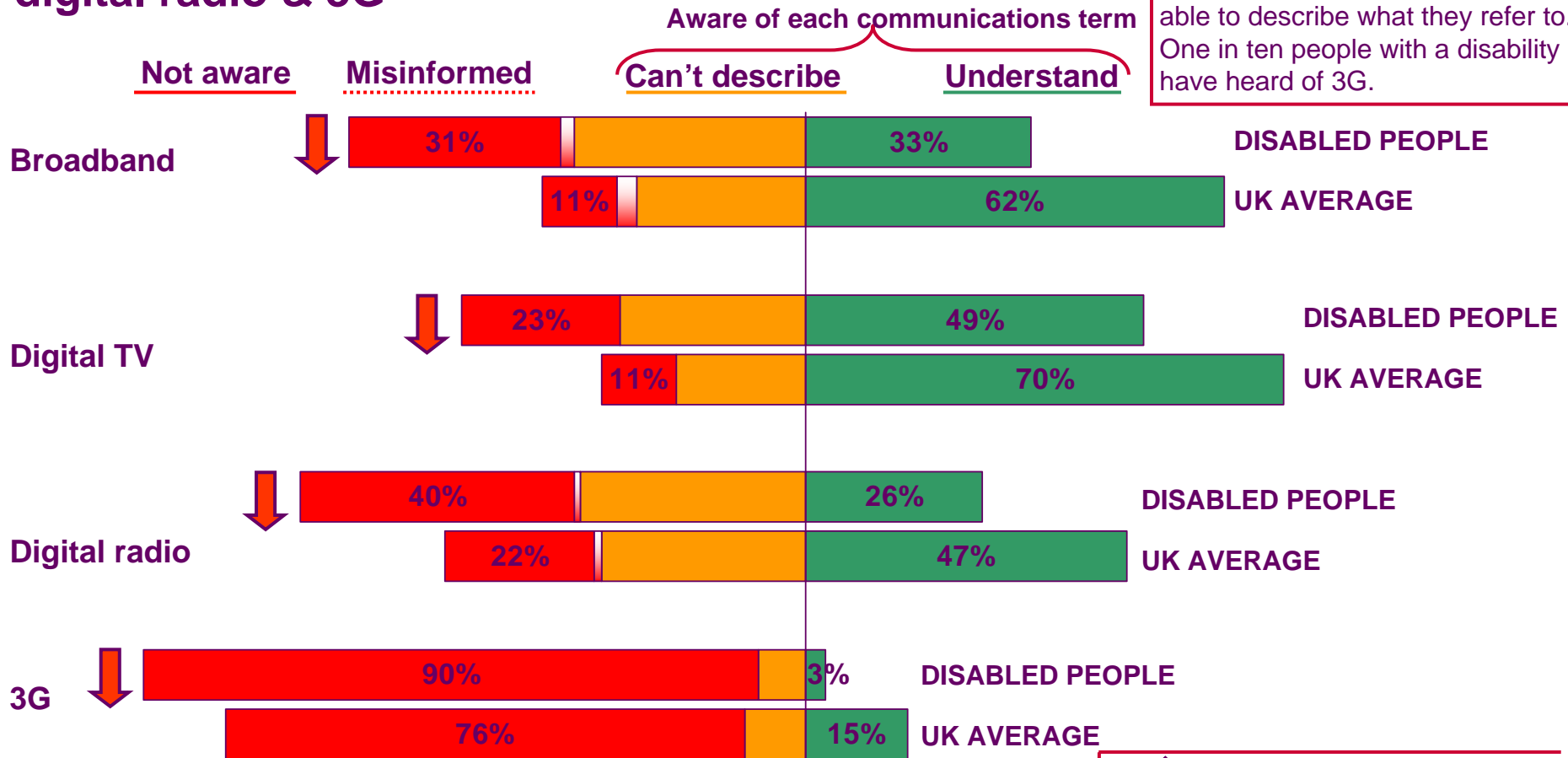
- Less likely to keep informed of developments in communications technologies at all
- Less likely to nominate any sources of information or advice on communications services

### *Ownership, use and satisfaction*

- No real difference in terms of ownership levels for landline, but less likely to have mobile phone, internet including broadband, and digital TV
- Higher levels of involuntary exclusion for internet access and mobile
- Less likely to access the internet at all
- Less likely overall to have ever switched supplier for their mobile phone service
- More difficulties using devices than UK average but similar levels of satisfaction to the UK

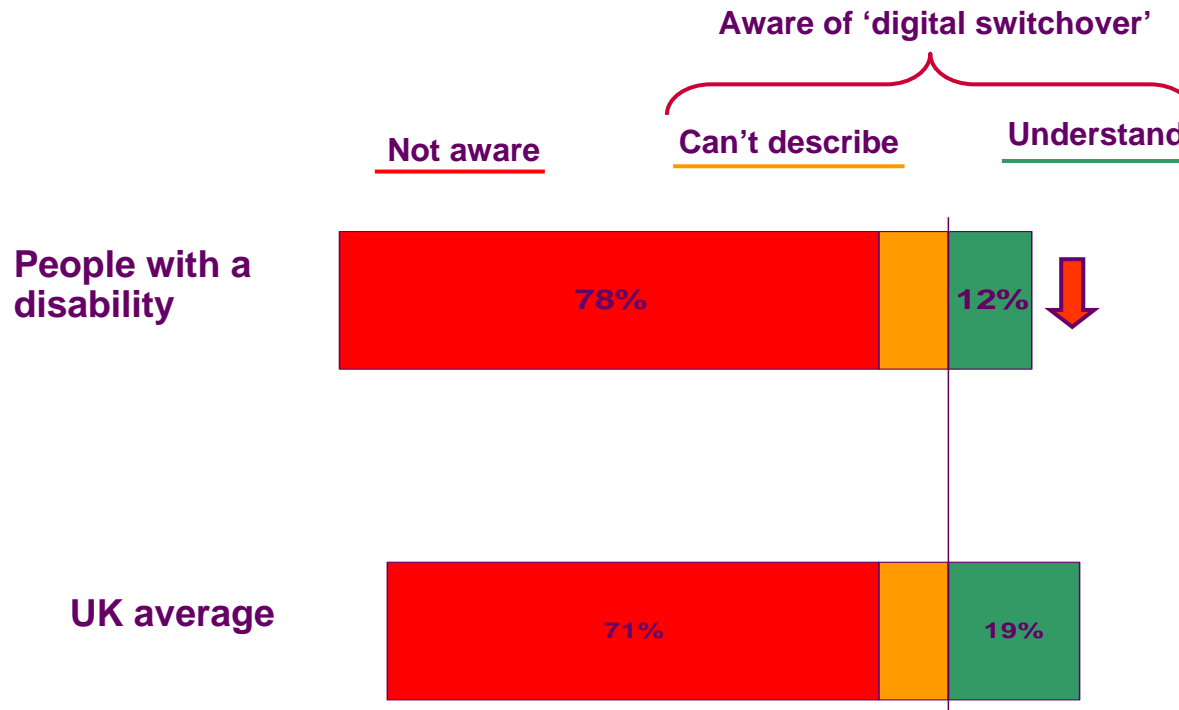
## Less likely to have heard of broadband, digital TV, digital radio & 3G

Whilst most people with a disability have **heard of** broadband, digital TV and digital radio, they are significantly less likely to understand the terms through being able to describe what they refer to. One in ten people with a disability have heard of 3G.



Base : All respondents with a disability (488) and UK overall (2519)

## Less likely than UK average to understand 'digital switchover'

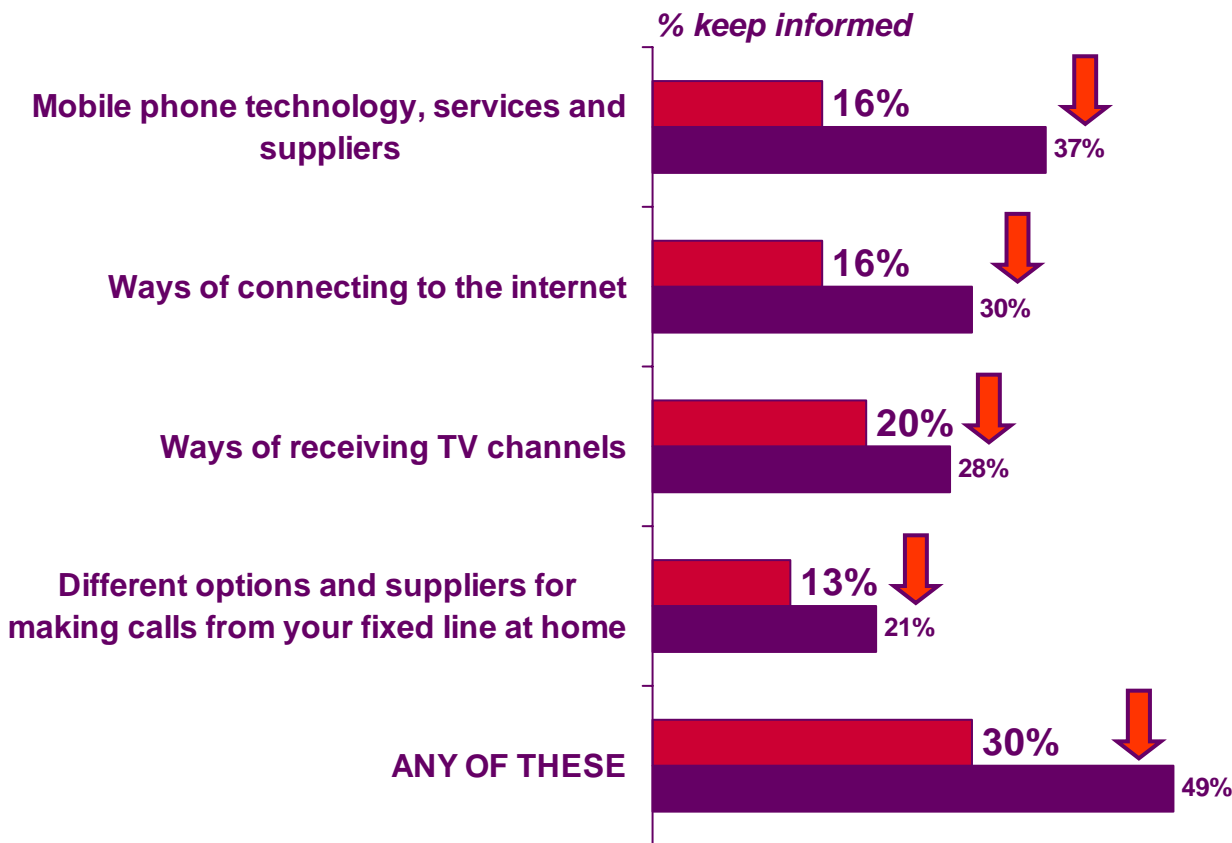


•One in ten people with a disability are able to correctly describe what the term 'digital switchover' refers to, and around eight in ten have not heard the term

↓ ↑ Indicates significantly lower or higher levels of understanding

Base : All respondents with a disability (488) and UK overall (2519)

## Significantly less likely to keep informed compared to UK average



Compared to the UK average, people with a disability are significantly **less** likely to keep themselves informed about new developments for each of the communications technologies, with just one in three people with a disability keeping informed about **any**.

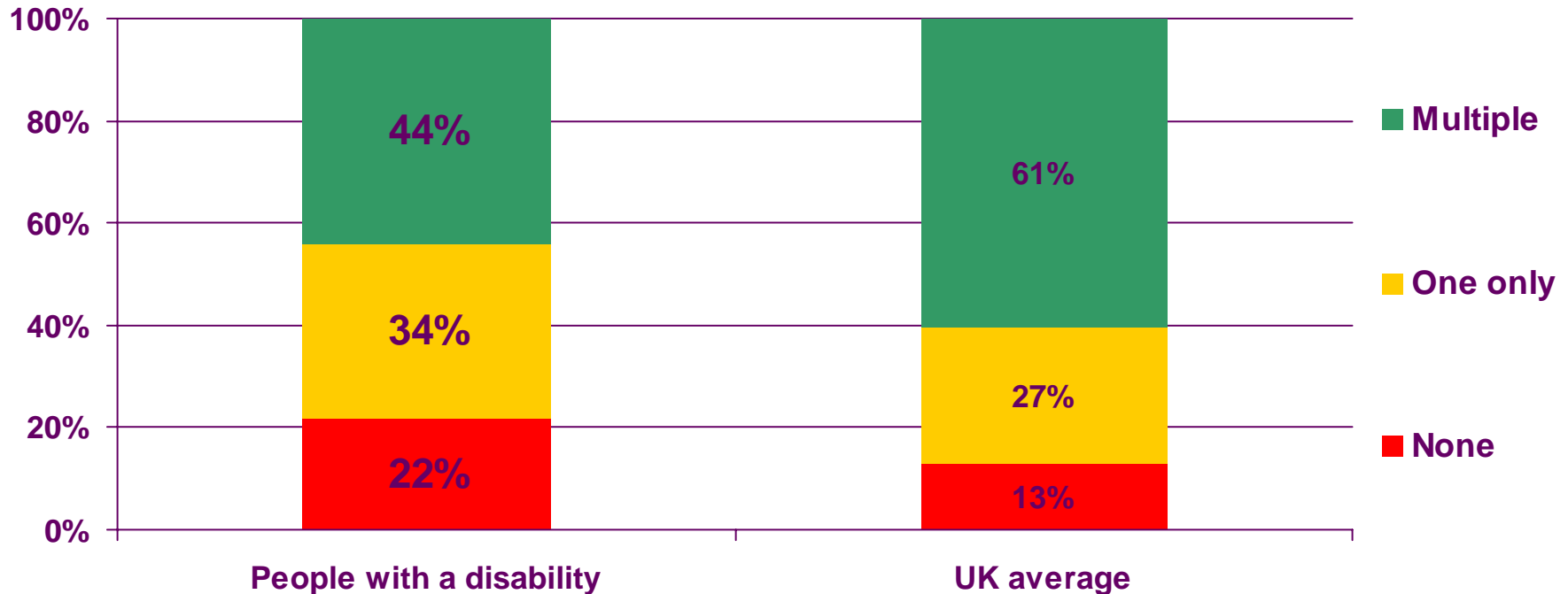
- People with a disability
- UK average

Indicates significantly lower or higher levels of keeping informed compared to the UK average

Base : All respondents with a disability (488) and UK overall (2519)

## Less likely than UK average to recall any sources of advice or information on communications services

Just under four in five people with a disability recall **any** sources of information, compared to the UK average of close to nine in ten

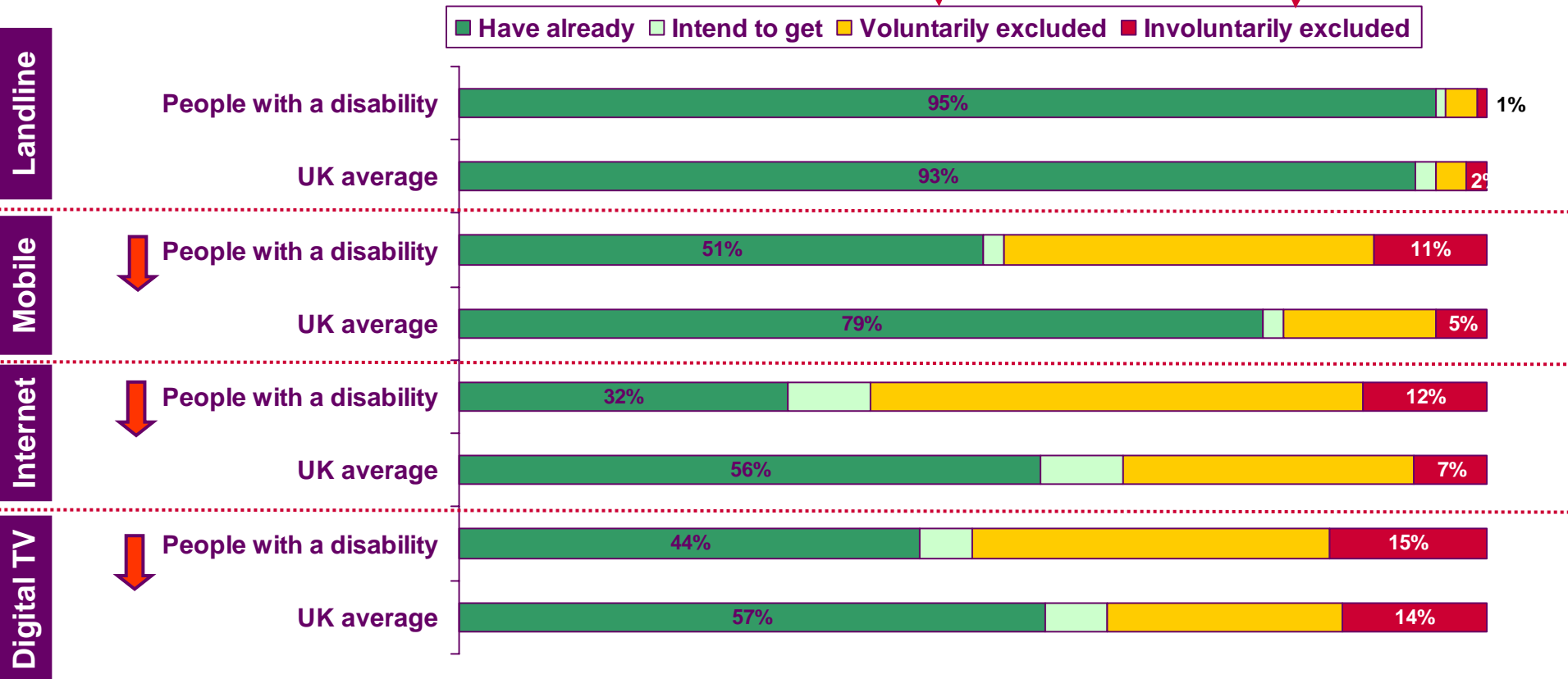


Base : All respondents with a disability (488) and UK overall (2519)

## Lower ownership of technologies except the landline

(i.e. No need/ don't want)

(i.e. Have not made a choice)

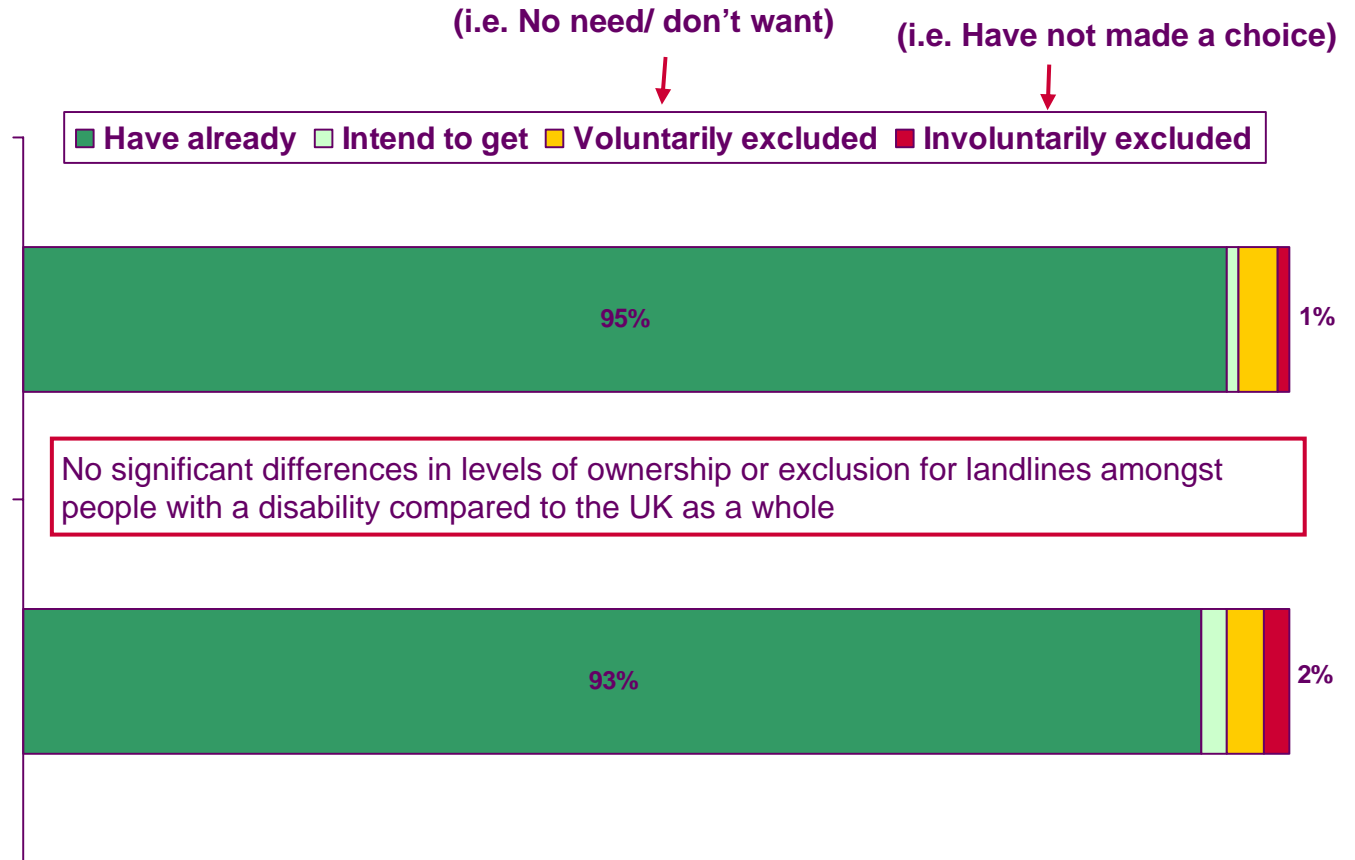


Base : All respondents with a disability (488) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

## Landline ownership is broadly similar to the UK average

Landline

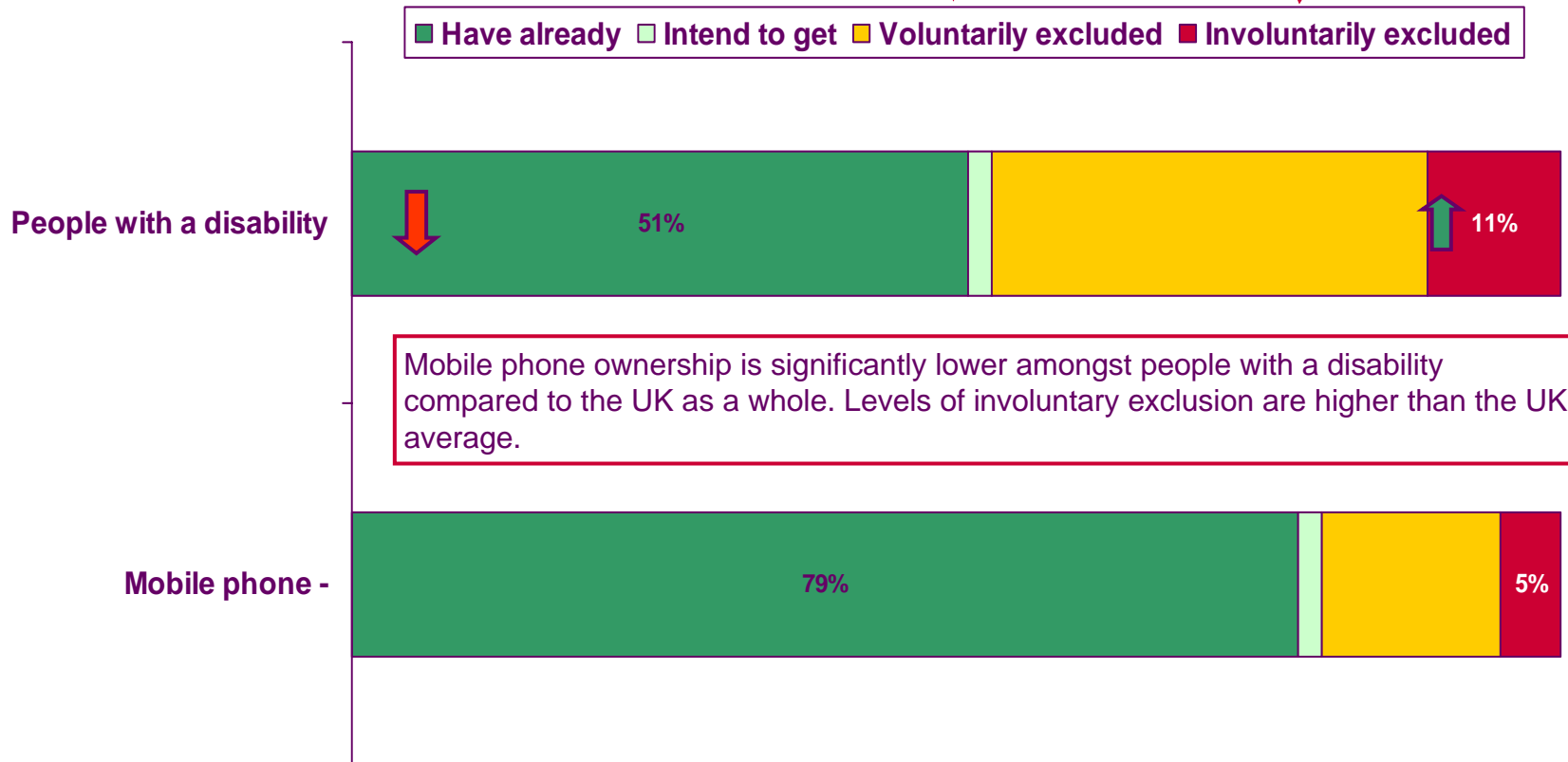


Base : All respondents with a disability (488) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

## Lower ownership and higher involuntary exclusion

(i.e. No need/ don't want) (i.e. Have not made a choice)



Base : All respondents with a disability (488) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

## Lower levels with internet at home and higher involuntary exclusion

(i.e. No need/ don't want)

(i.e. Have not made a choice)

■ Have already ■ Intend to get ■ Voluntarily excluded ■ Involuntarily excluded

People with a disability



One in three people with a disability have the internet at home, compared to over half for the UK as a whole. Higher levels of involuntary exclusion indicate that lower ownership levels are not always through choice.

UK average

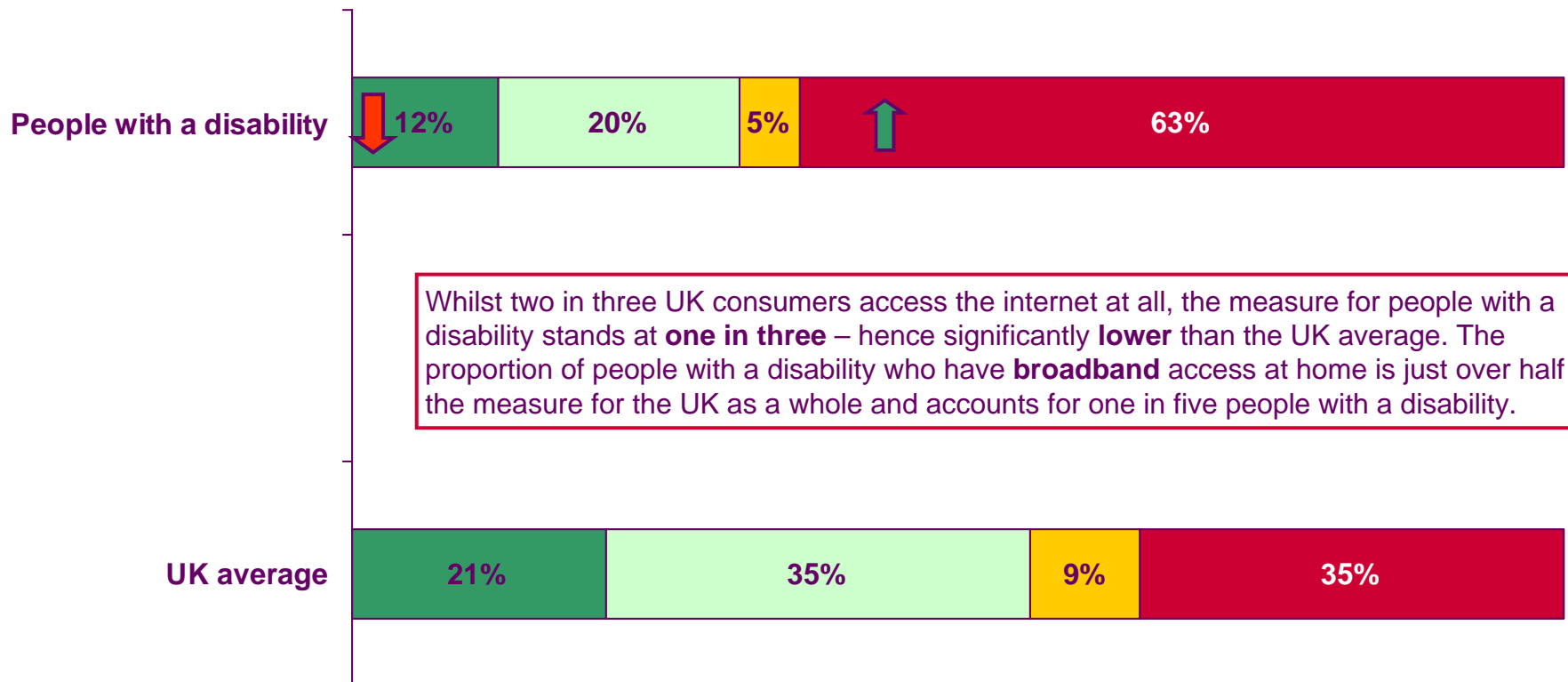


↑↓ Indicates significantly lower or higher levels of ownership

Base : All respondents with a disability (488) and UK overall (2519)

## Significantly less likely to access the internet at home, elsewhere or to use broadband

■ Broadband access ■ Dial-up access ■ Access elsewhere but not at home ■ Do not access the internet

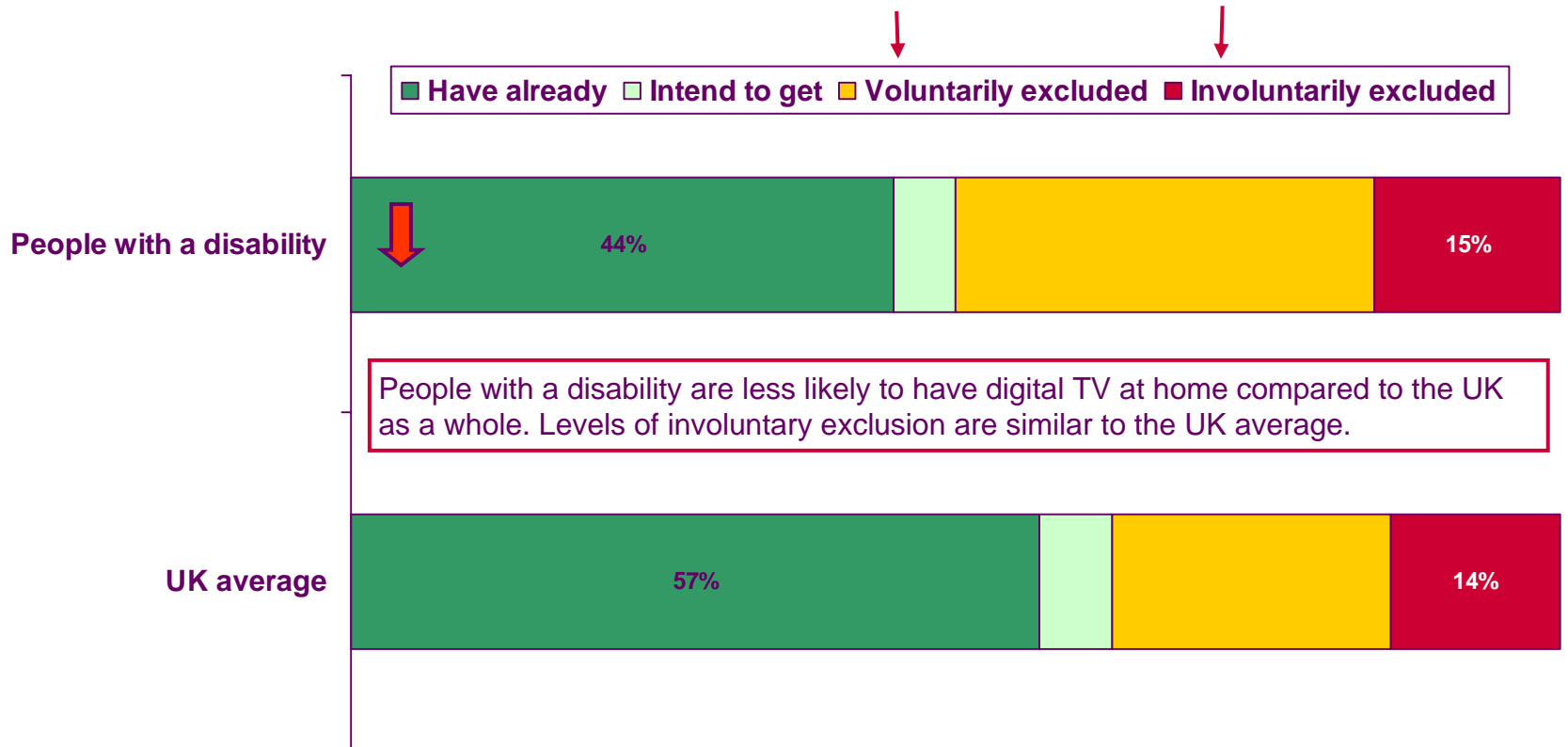


Base : All respondents with a disability (488) and UK overall (2519)

↓↑ Indicates significantly lower or higher levels accessing the Internet

## Lower ownership of digital TV

(i.e. No need/ don't want) (i.e. Have not made a choice)



Base : All respondents with a disability (488) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

## Levels of switching supplier are broadly similar to the UK average

% ever switched

Landline



Mobile



Internet



Digital TV



Compared to the UK average, consumers with a disability are significantly **less** likely to have switched supplier for their mobile phone service. Levels of switching for other technologies do not differ from the UK average.

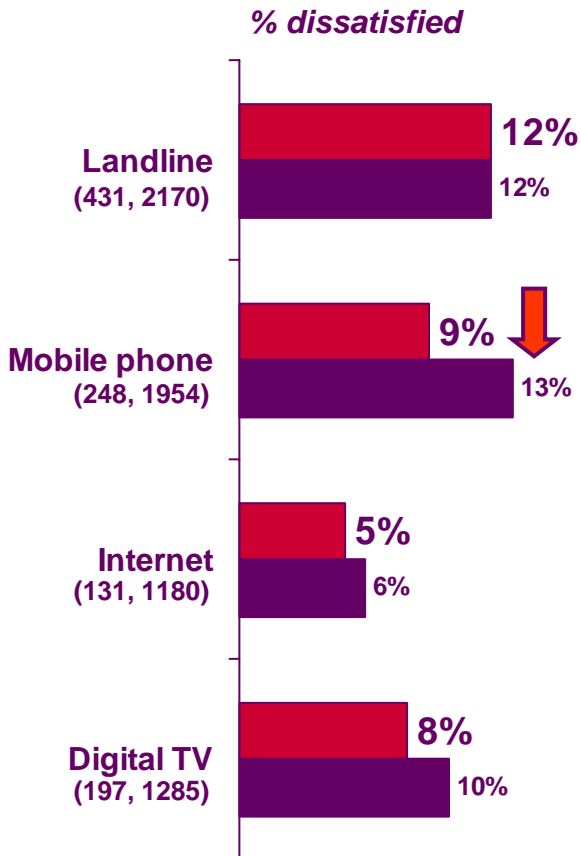
■ People with disability

■ UK average

Base : All with access to each service at home

Indicates significantly lower or higher levels of switching

## Levels of dissatisfaction with service broadly similar to the UK



Compared to the UK average, people with a disability are significantly **less** likely to be dissatisfied with the service they receive from their mobile phone network.

Whilst dissatisfaction regarding the Internet and digital TV service is lower than UK average, these levels do not differ significantly.

Higher levels of dissatisfaction are found amongst those who keep themselves informed, which is less common amongst people with a disability.

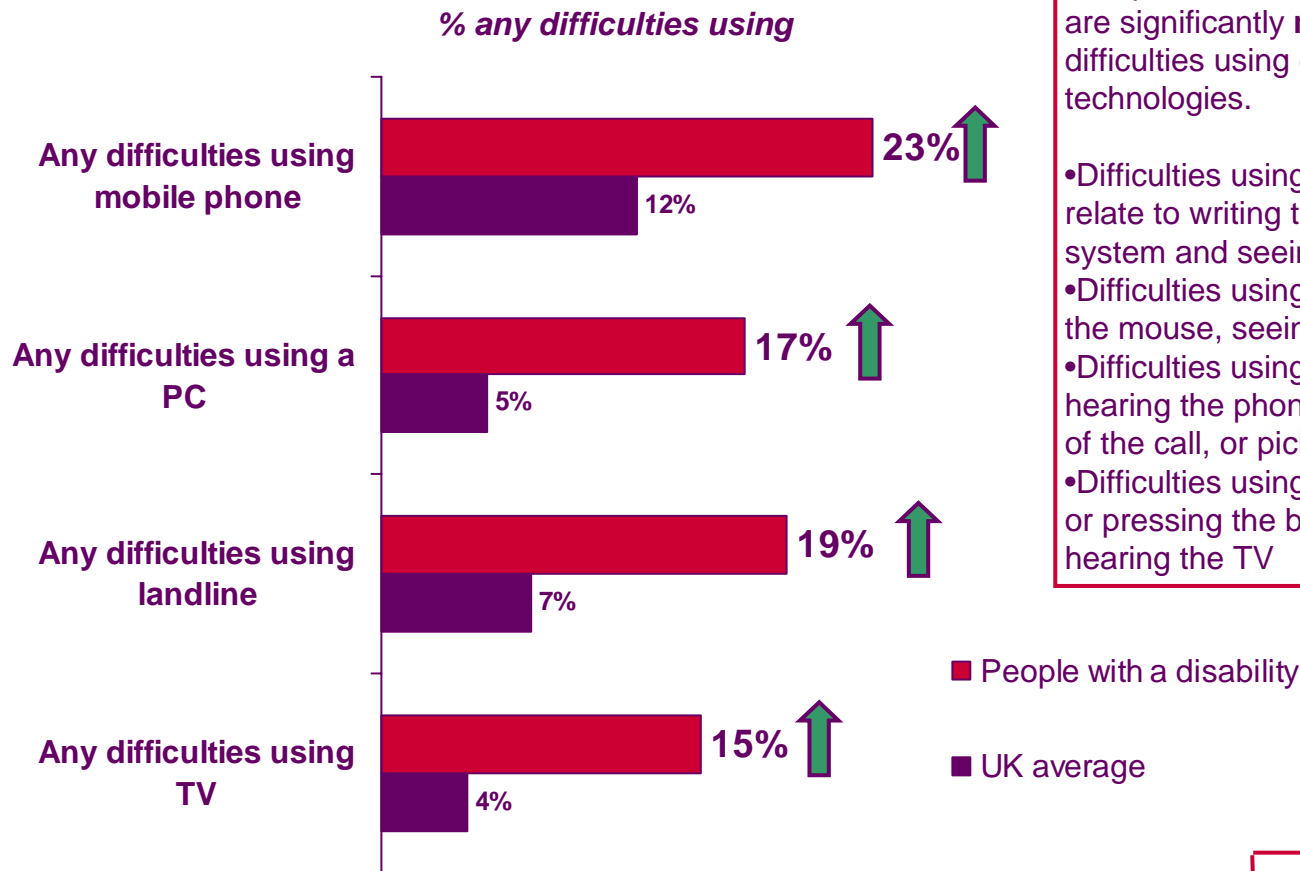
- People with a disability
- UK average



Indicates significantly lower or higher levels of dissatisfaction compared to the UK average

Base : All with access to each service at home

## More likely to have any difficulties using communications technologies



Compared to the UK average, people with a disability are significantly **more** likely to report they have any difficulties using each of the four communications technologies.

- Difficulties using a mobile phone more commonly relate to writing text messages, navigating the menu system and seeing the numbers used to dial
- Difficulties using a PC more commonly relate to using the mouse, seeing the display, or using the keyboard
- Difficulties using a landline more commonly relate to hearing the phone ring or the person on the other end of the call, or picking up the handset
- Difficulties using a TV more commonly relate to seeing or pressing the buttons on the remote control, or hearing the TV

Base : All respondents with a disability (488) and UK overall (2519)



Indicates significantly lower or higher levels reporting any difficulties using compared to the UK average