



Ofcom Consumer Panel Research Quantitative Research Findings






Focus on people with a disability

June 2006

Report outline

- This report compares the findings for residential consumers with a disability with those 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?*’
 - comparisons are shown for those with a disability aged either 15-64 or 65 and over
 - plus measures for the 2004 survey are also shown for comparison
- Differences shown of $\pm 4\%$ (where based on all respondents) are statistically significant
- Where findings for people with a disability are significantly different from the UK average or measures have changed significantly between 2004 and 2005 this has been shown using green and red arrows
 - to indicate significantly higher or lower measure for people with a disability  
- Unweighted base sizes are shown throughout the report to illustrate the number of respondents interviewed

Profile of vulnerable groups by nation

	England 	Scotland 	Wales 	Northern Ireland 	UK TOTAL 	Interviews conducted
Older people (aged 65 plus)	16%	16%	18%	14%	16%	463
Rural	13%	16%	22%	35%	12%	266
Limiting long term illness/ disability	14%	18%	29%	15%	15%	738
Household income under £11,500	26%	32%	43%	29%	27%	1080
TOTAL NATION SPLIT	84%	8%	5%	3%	100%	
INTERVIEWS CONDUCTED	1507	460	366	356	2689	

Source: Census 2001-Office of National Statistics and for rural areas Business Geographic 'Urban Indicator'

Knowledge

- Lower understanding of each of the communication terms compared to the UK average, but increase since 2004 in understanding of broadband, digital TV and 3G
- Overall awareness (aware of term or aware of service capability) for each of the services except digital TV is lower than the UK average
- Less likely than UK average to keep informed of developments regarding mobile phones and the internet
- Friends and family are by far the most popular source of advice, and people with a disability are less likely to refer to online sources than the UK average. Younger people with a disability do not differ in this respect from the UK average.
- Awareness of digital switchover does not differ from the UK average, with a significant increase since 2004

Ownership

- Less likely than UK average to have a mobile phone, digital TV, internet access generally and broadband internet access in particular, and as likely as the UK average to have a landline at home
- Higher level of involuntary exclusion for digital TV compared to the UK average, but all other services see higher levels of voluntary exclusion suggesting that lower ownership is through choice
- Increase since 2004 in ownership of mobile phone, digital TV and internet and broadband access to the internet

Usage

- Use made of mobile phone is much narrower than the UK average, also fewer uses made of the internet generally

Attitudes

- Generally similar levels of concerns or worries regarding services amongst owners compared to the UK average, but an increase in levels for landline and digital TV since 2004
- More likely to rate landline service as essential, with an increase in the importance of mobile phone service since 2004
- Whilst satisfaction with landline service exceeds the UK average, satisfaction with the internet service is lower. There are indications of increased satisfaction since 2004 for internet users

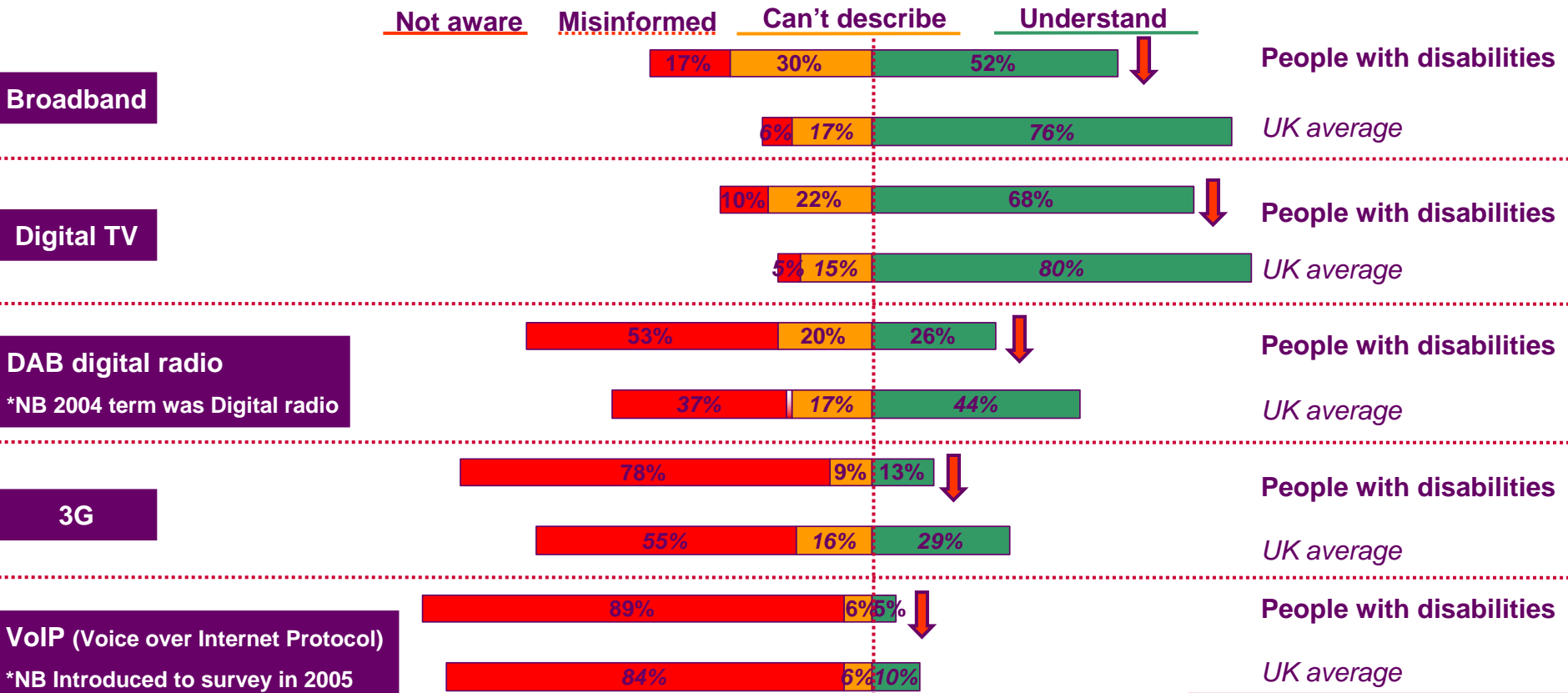
CONSUMER PANEL

Awareness and understanding of communication terms - comparison to UK

PEOPLE WITH DISABILITY

Knowledge

- Higher awareness for digital TV and broadband than all other communication terms amongst people with a disability, with lower awareness of 3G and VoIP
- Amongst people with a disability awareness and understanding of each of the communication terms is significantly lower than the UK average
- People with a disability in low income households are the least aware of communication terms



↓ ↑ Indicates significantly lower or higher than 2005 UK average

Base : All respondents with a disability (738) and UK overall (2,689)

CONSUMER PANEL

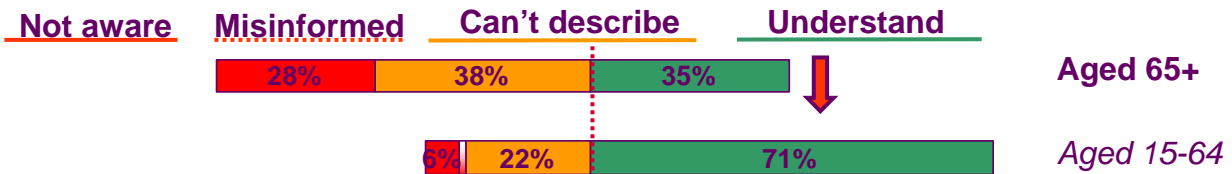
Awareness and understanding of communication terms - comparison by age

PEOPLE WITH DISABILITY

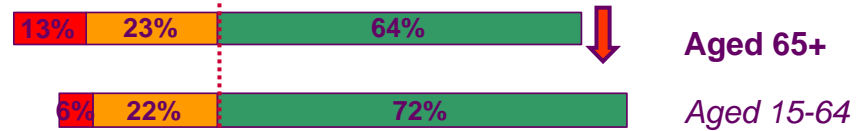
- Older people (aged 65 and over) with a disability are significantly less aware of each of the communication terms compared to younger people with a disability, and people with a disability overall
- Largest gap between younger and older people with a disability regarding awareness and understanding of broadband, and the smallest gap regarding digital TV

Knowledge

Broadband



Digital TV



DAB digital radio



3G



VoIP (Voice over Internet Protocol)



↓ ↑ Indicates significantly lower or higher than 2005 people with disabilities

Base : All respondents with a disability aged 65+ (273) and aged 15-64 (465)

CONSUMER PANEL

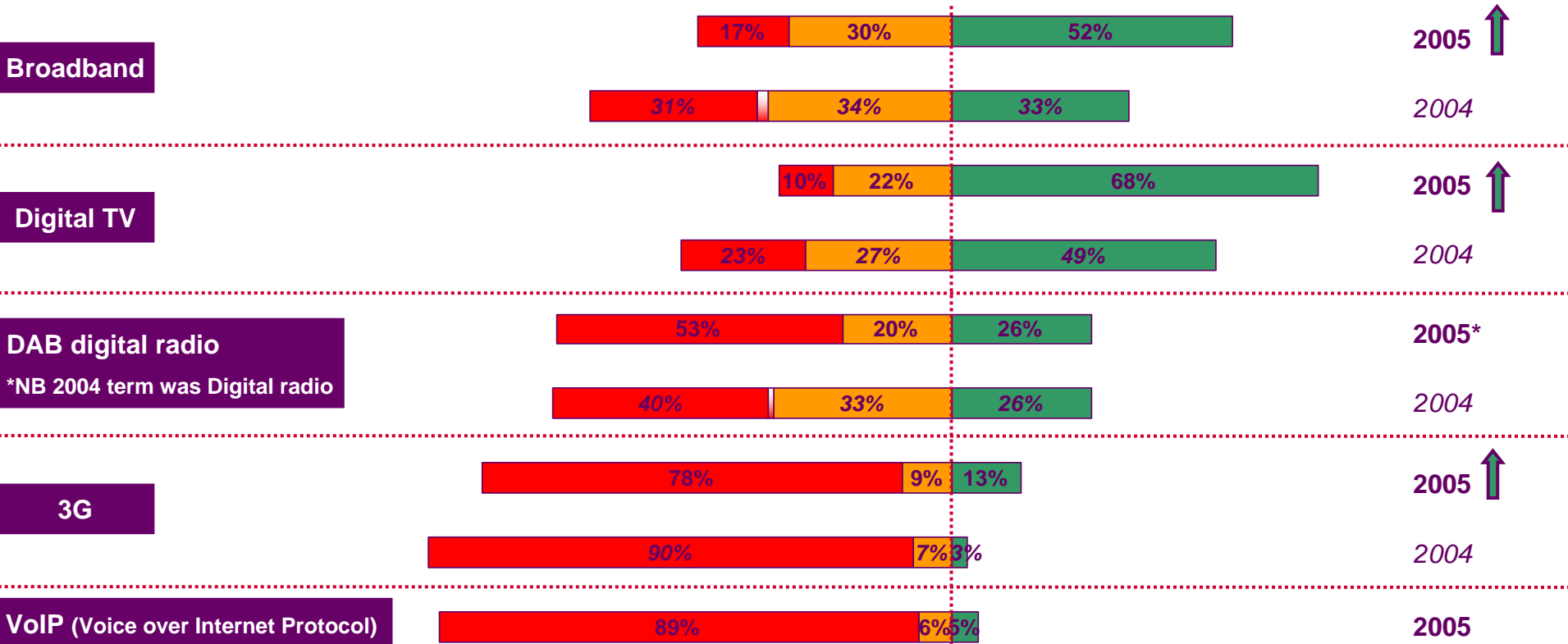
Awareness and understanding of communication terms – change since 2004 across all people with disability

PEOPLE WITH DISABILITY

- Significant increase amongst people with a disability in awareness and understanding of the communications terms broadband, digital TV and 3G

Knowledge

Not aware Misinformed Can't describe Understand



↓ ↑ Indicates significantly lower or higher than 2004 people with disabilities

Base : All respondents with a disability (738) and 2004 (488)

CONSUMER PANEL

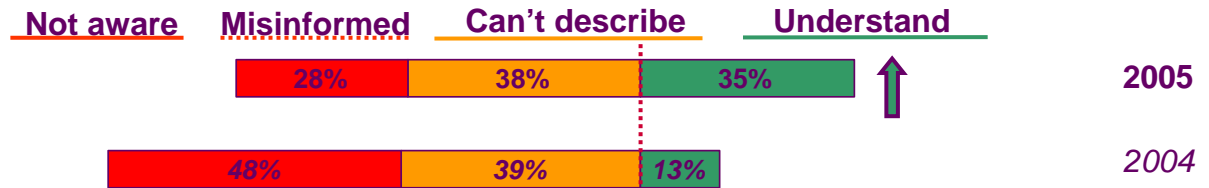
Awareness and understanding of communication terms - aged 65 and over change since 2004

PEOPLE WITH DISABILITY

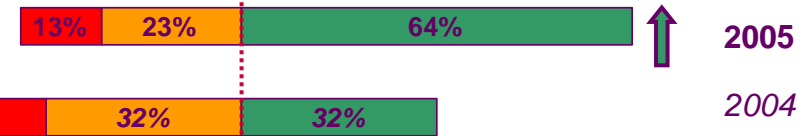
- Amongst older people with a disability, significant increase in awareness and understanding of the communication terms broadband and digital TV since 2004

Knowledge

Broadband



Digital TV

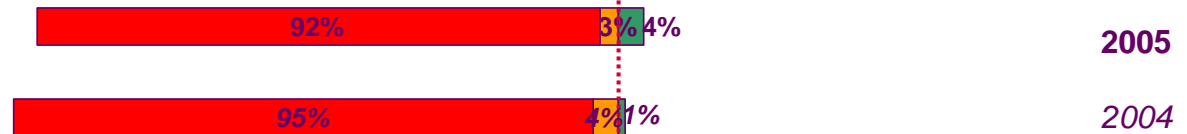


DAB digital radio

*NB 2004 term was Digital radio



3G



VoIP (Voice over Internet Protocol)



↑ ↓ Indicates significantly lower or higher than 2004 people with disabilities aged 65+

Base : All respondents with a disability aged 65+ 2005 (273) and 2004 (233)

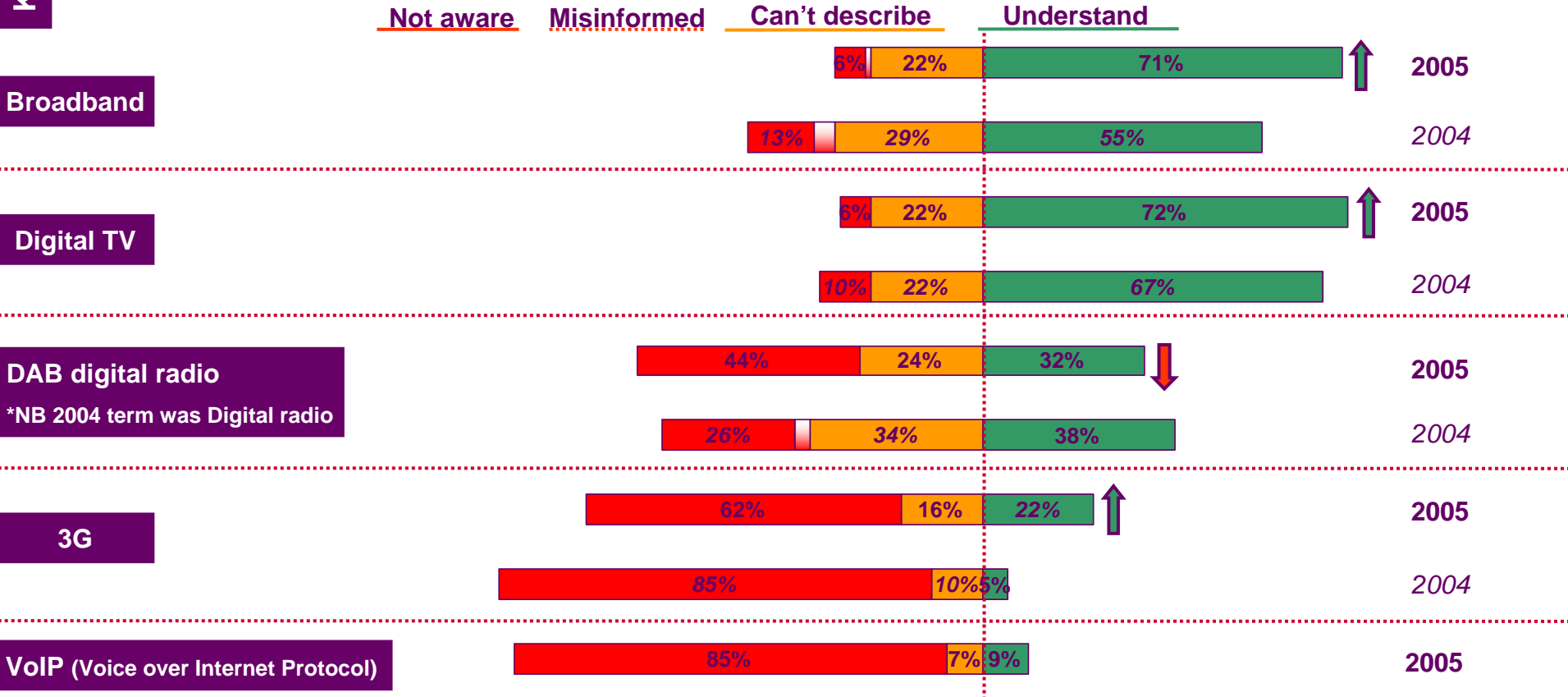
CONSUMER PANEL

Awareness and understanding of communication terms - aged 15-64 change since 2004

PEOPLE WITH DISABILITY

- There has been a significant increase amongst younger people with a disability in awareness and understanding of the communication terms broadband, digital TV and 3G since 2004

Knowledge

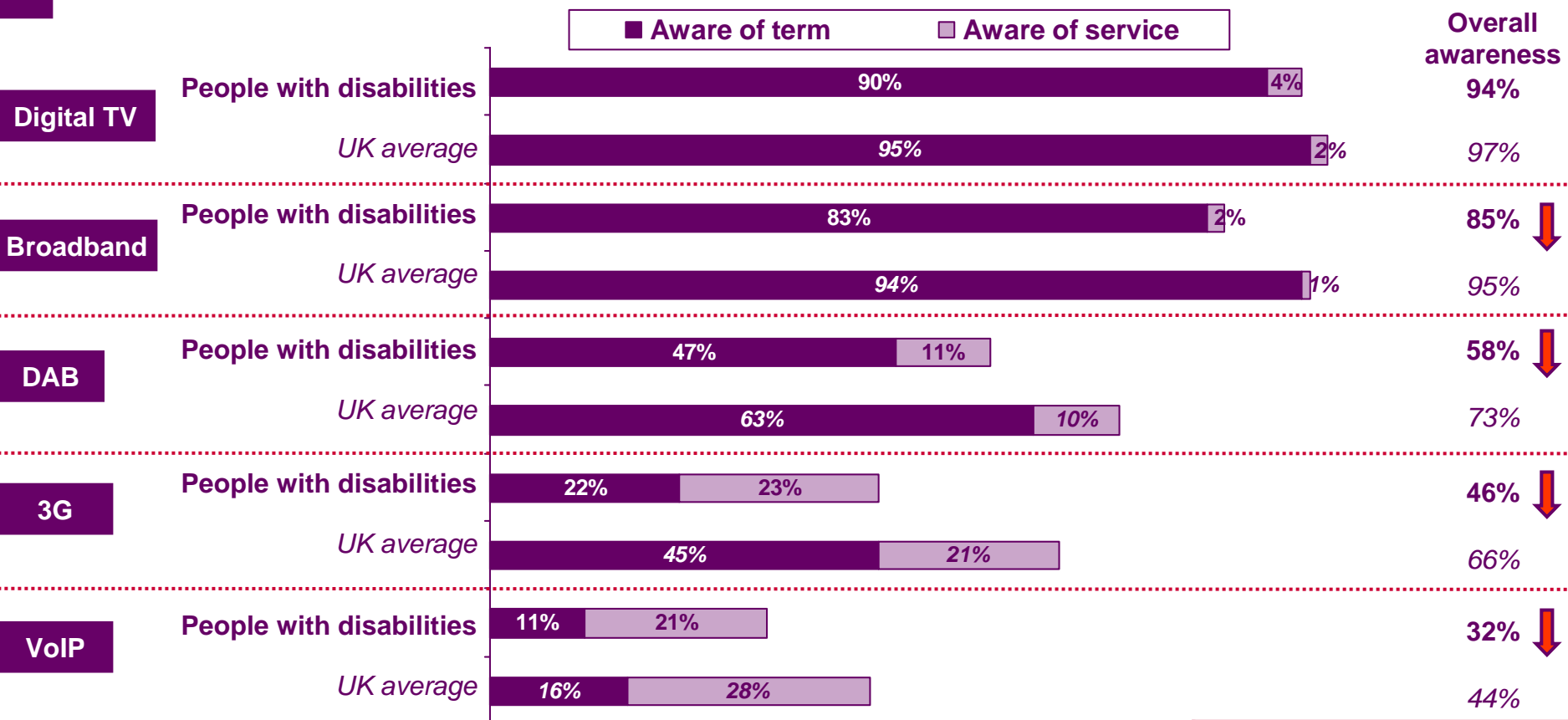


↑ ↓ Indicates significantly lower or higher than 2004 people with disabilities aged 15-64

Base : All respondents with a disability aged 15-64 2005 (465) and 2004 (255)

- A significant proportion of people with a disability are aware of the capability of DAB digital radio, 3G and VoIP once they are read a description of what these services provide
- Levels of overall awareness amongst people with a disability for each of the services except digital TV are significantly below the average for the UK

Knowledge

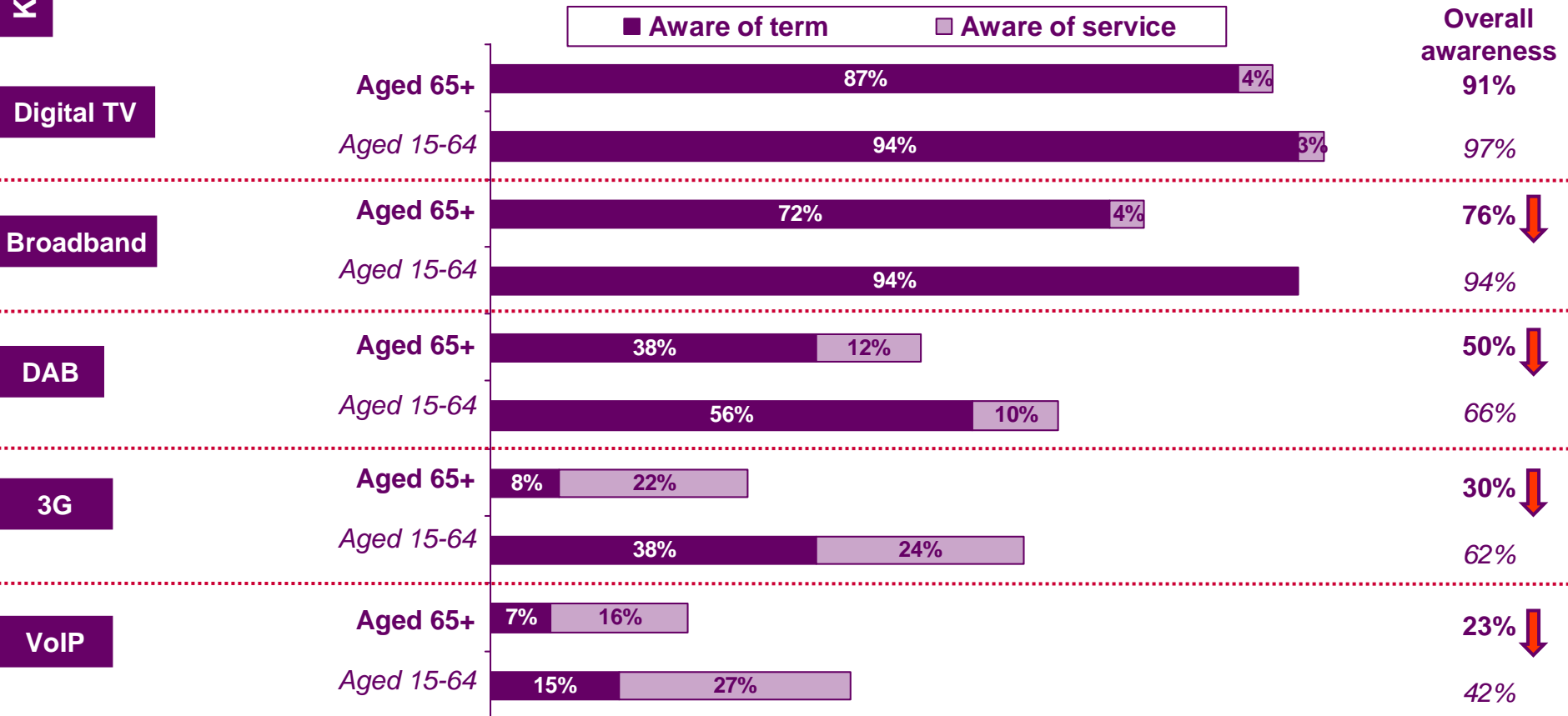


↓ ↑ Indicates significantly lower or higher than 2005 UK average

Base : All respondents with a disability (738) and UK overall (2,689)

Levels of awareness amongst older people with a disability for each of the services except digital TV are significantly below the average for younger people with a disability, and people with a disability overall

Knowledge

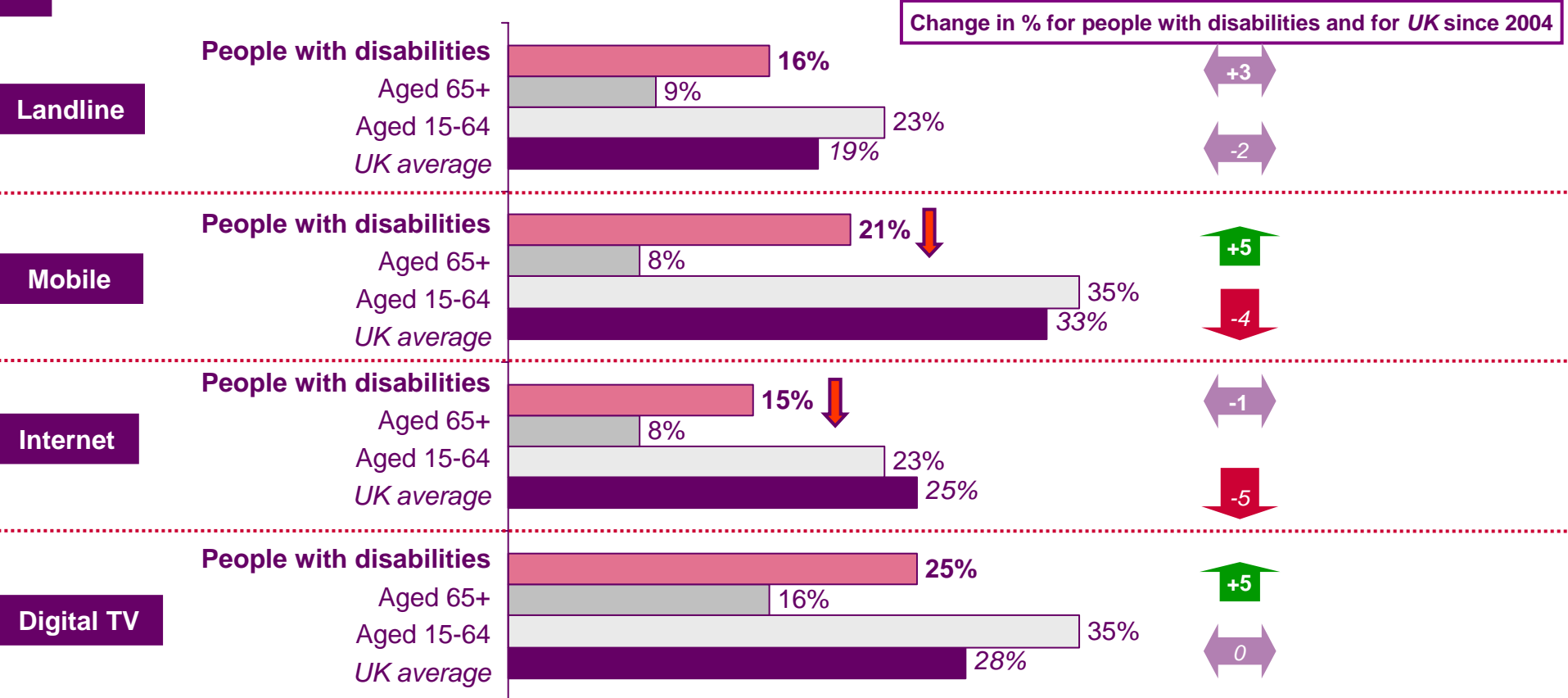


↓ ↑ Indicates significantly lower or higher than 2005 people with disabilities

Base : All respondents with a disability aged 65+ (273) and aged 15-64 (465)

- People with a disability are significantly less likely to keep themselves informed about developments for mobile phones and the internet compared to the UK overall, but it is clear that age is a key discriminator; with younger people with a disability at or above the UK average for each measure
- Largest gap between older and younger people with a disability in keeping informed about mobile phone services, and smallest gap regarding landlines
- Compared to 2004, people with a disability are more likely to keep informed about mobile phones and digital TV

Knowledge



↑ ↓ Indicates significantly lower or higher than 2005 UK average

Base : All respondents with a disability (738) and UK overall (2,689)

- Friends and family are the most popular source of advice and information on communications sources for people with a disability, and see a significant increase in nominations since 2004, as do media sources (e.g. TV, radio, press) and on-line sources
- Older and younger people with a disability differ considerably in terms of sources of advice, with younger people with a disability matching the UK average (indicated by the lines below). The greatest gap between older and younger people relates to on-line sources of advice and information

% Change since 2004 people with disabilities

+19

+5

+11

0

-4

% Change since 2004 UK

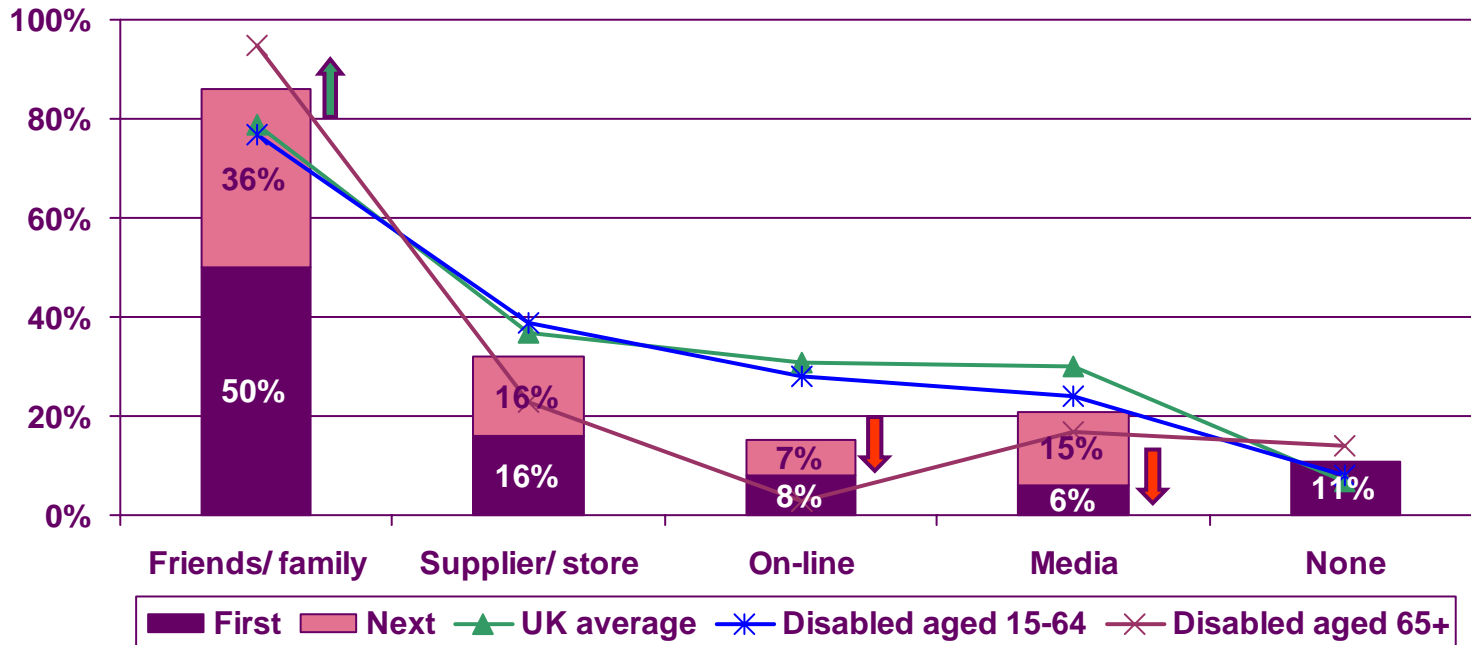
+10

-2

+9

-1

-1

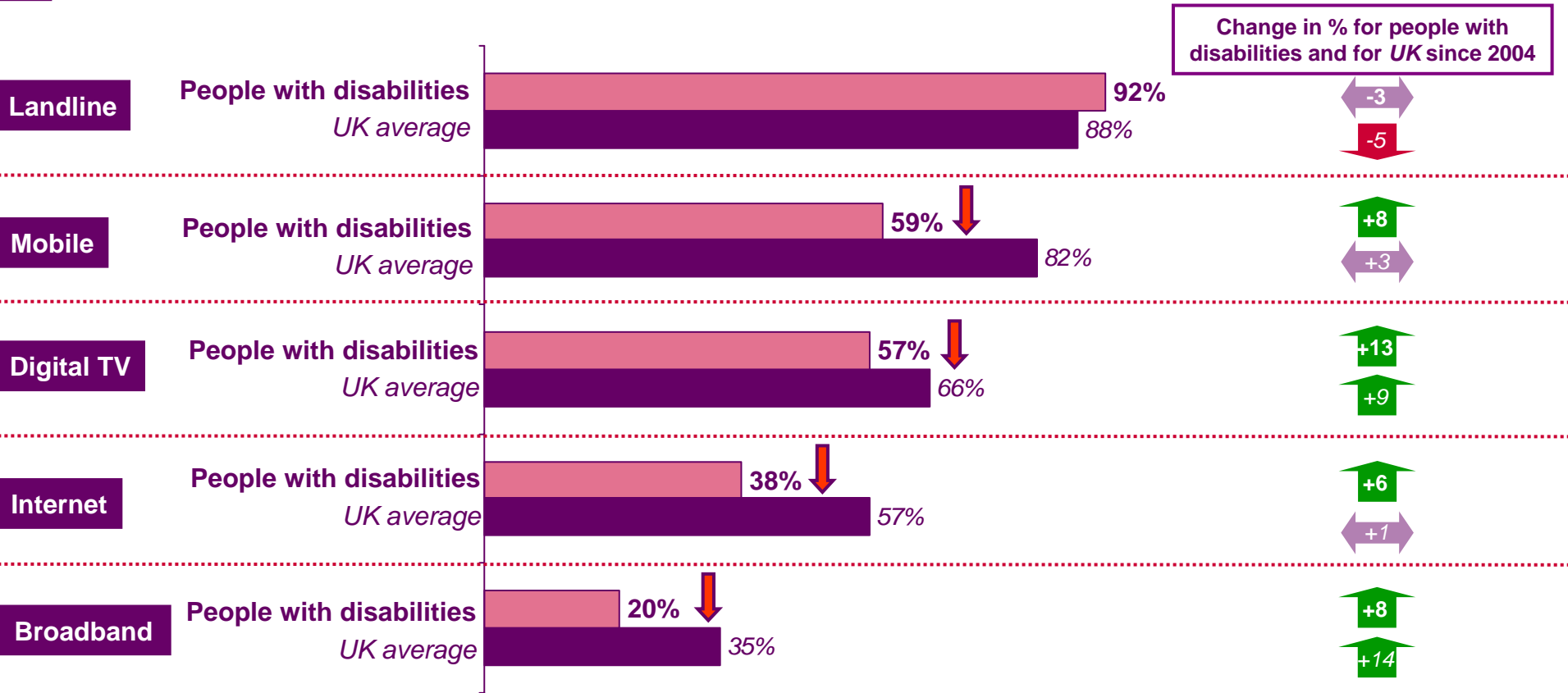


Significantly lower or higher than 2005 UK average

Base : All respondents with a disability (738) and UK overall (2,689)

- People with a disability are significantly less likely to have each of the platforms compared to the UK average, with the exception of a landline at home
- However, ownership of mobile phones, digital TV, the internet generally and broadband access specifically has increased significantly since 2004

Ownership



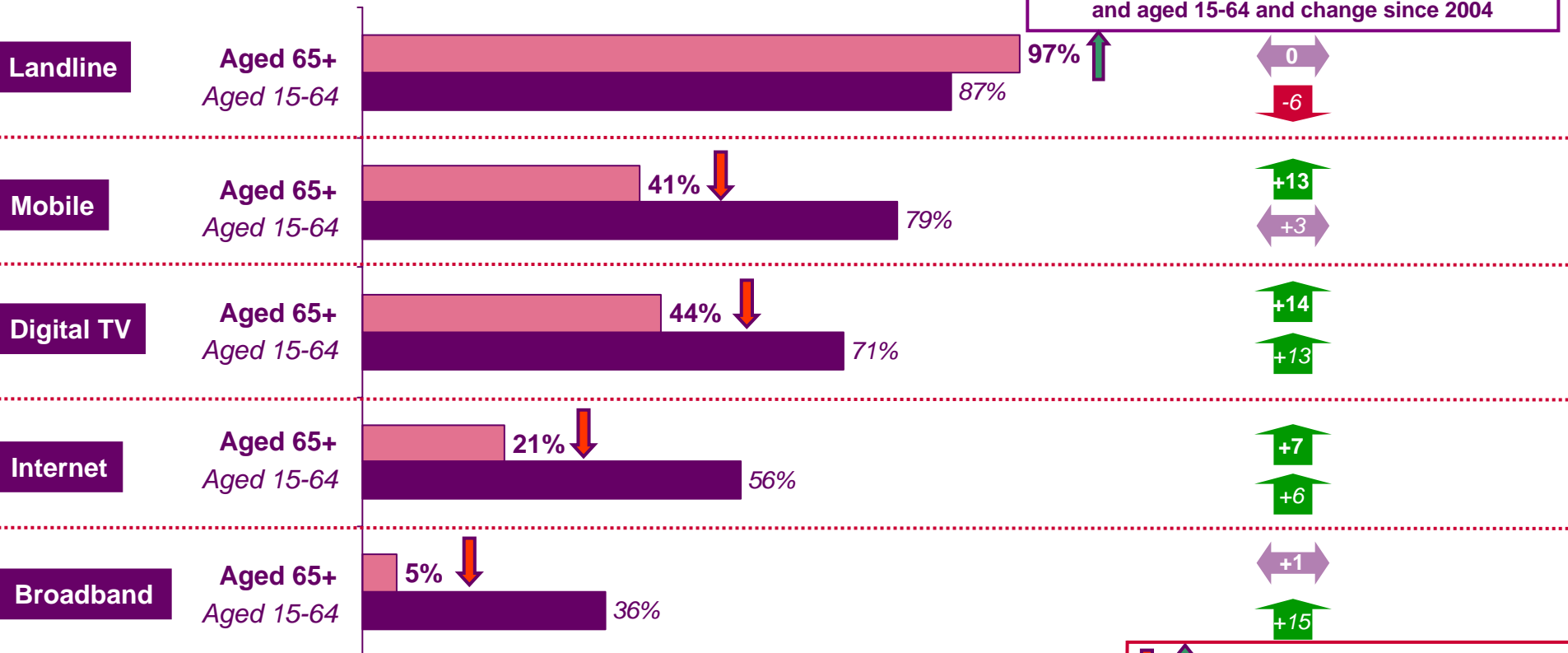
Base : All respondents with a disability (738) and UK overall (2,689)

↑ ↓ Indicates significantly lower or higher than 2005 UK average

- Older people with a disability are significantly less likely to have each of the platforms compared to younger people with a disability and people with a disability overall, with the exception of a landline at home
- However, ownership of mobile phones, digital TV and the internet generally has increased significantly amongst older people with a disability since 2004. The same is true for younger people with a disability for digital TV, the internet generally and broadband access specifically

Ownership

Change in % for people with disabilities aged 65+ and aged 15-64 and change since 2004

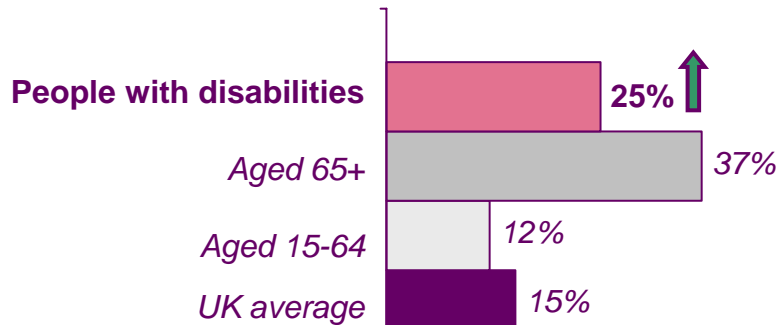


↓ ↑ Indicates significantly lower or higher than 2005 people with disabilities

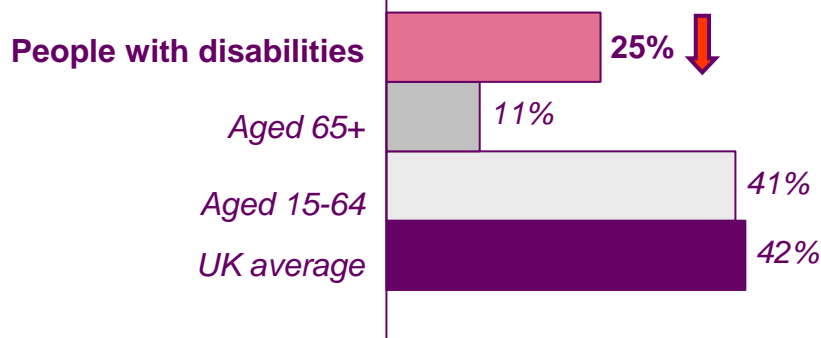
Base : All respondents with a disability aged 65+ (273) and aged 15-64 (465)

- One in four people with a disability own just one of the four communications technologies (landline, mobile phone, digital TV or the internet) – typically just a landline phone. Amongst older people with a disability, the proportion owning one platform is much higher; at 37%.
- Owning all four of these types communications technology is significantly less common amongst people with a disability compared to the UK as a whole, due to lower ownership levels for each of the platforms other than landline phones. Younger people with a disability match the UK average, however.

Have just one of
landline, mobile, digital
TV or internet at home



Have all four of landline,
mobile, digital TV and
internet at home

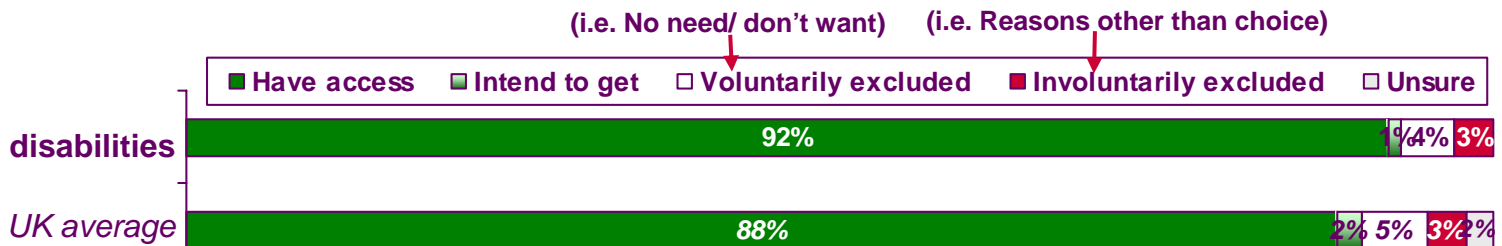


↓ ↑ Indicates significantly lower or higher than 2005 UK average

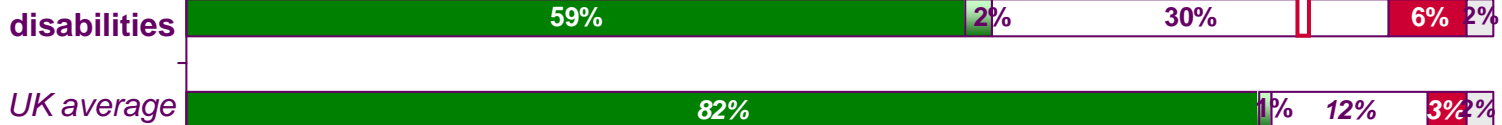
- For each of the four communications technologies, involuntary exclusion is principally due to affordability (i.e. monthly charges, usage charges, cost of equipment)
- Lower ownership levels see people with a disability significantly more likely than the UK average to be voluntarily excluded for mobile phones, internet and digital TV – although people with a disability are also more likely to be involuntarily excluded for digital TV

Ownership

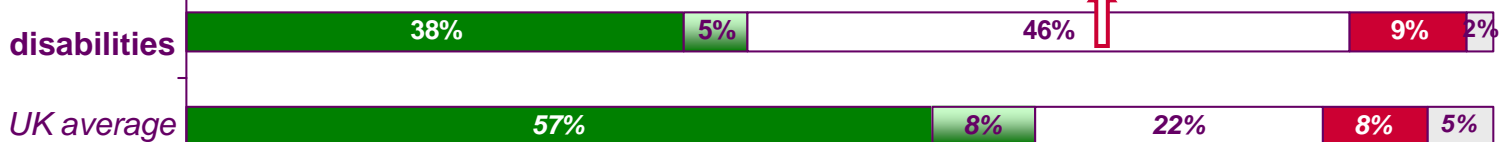
Landline



Mobile



Internet



Digital TV



↓ ↑ Indicates significantly lower or higher than 2005 UK average

Base : All respondents with a disability (738) and UK overall (2,689)

- Lower ownership levels of mobile phones and the internet amongst older people with a disability result in higher levels of voluntary exclusion compared to people with a disability overall
- Younger people with a disability match the UK average for levels of voluntary and involuntary exclusion

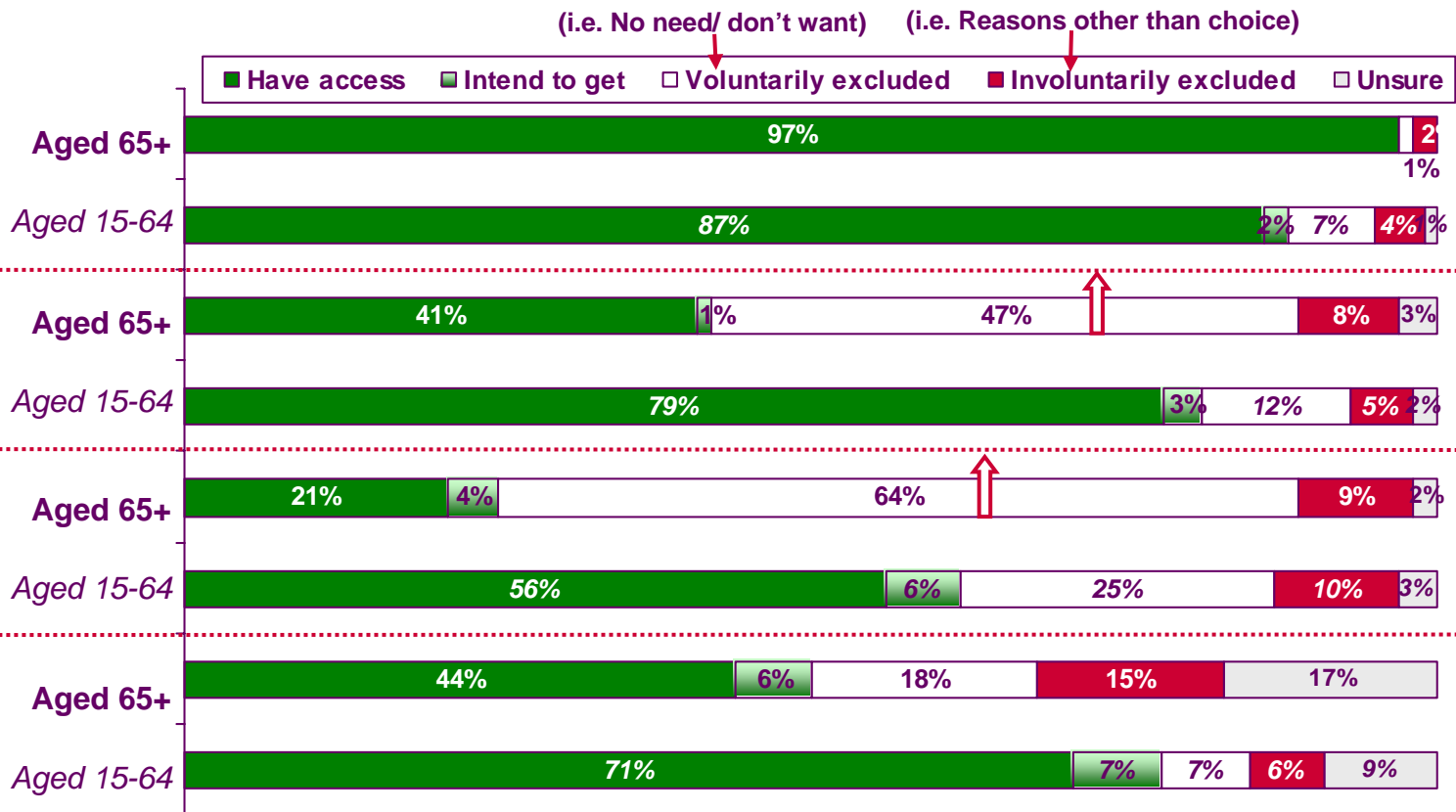
Ownership

Landline

Mobile

Internet

Digital TV



↓ ↑ Indicates significantly lower or higher than 2005 people with disabilities

Base : All respondents with a disability aged 65+ (273) and aged 15-64 (465)

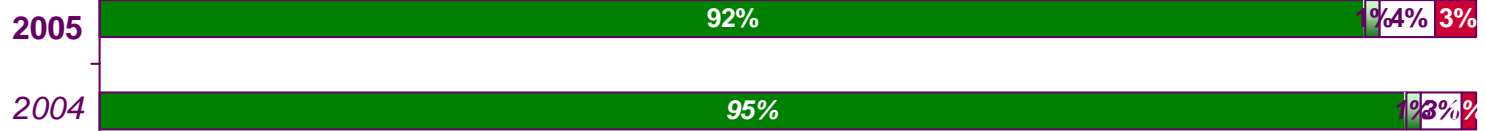
- Compared to 2004 increased ownership of mobile phone and digital TV sees a significant drop in the levels of voluntary exclusion for people with a disability
- Digital TV remains the service with the highest levels of involuntary exclusion amongst people with a disability, and also the highest proportion unsure whether they will get the service or not – possibly related to lower than average understanding of what digital TV is amongst people with a disability
- Involuntary exclusion is higher amongst people with a disability in low income households for each of the services

Ownership

(i.e. No need/ don't want) (i.e. Reasons other than choice)

■ Have access ■ Intend to get □ Voluntarily excluded ■ Involuntarily excluded □ Unsure

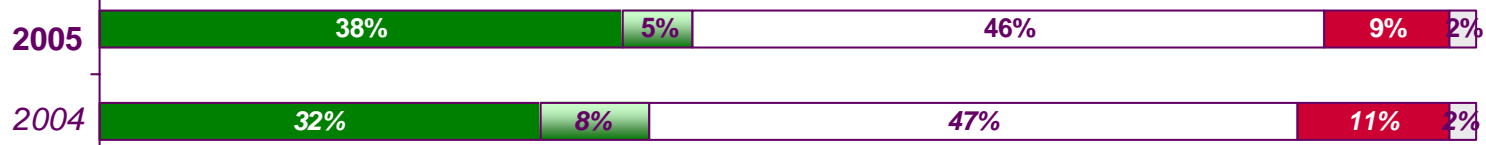
Landline



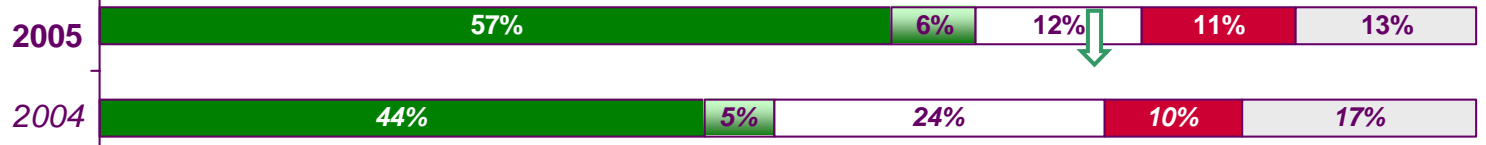
Mobile



Internet



Digital TV



↓ ↑ Indicates significantly lower or higher than 2004 people with disabilities

Base : All respondents with a disability (738) and 2004 (488)

- Compared to 2004 involuntary exclusion is lower amongst older people with a disability for mobile phone services and digital TV services, however there has been little change in involuntary exclusion for internet services which stands at more than three in five amongst this group of consumers

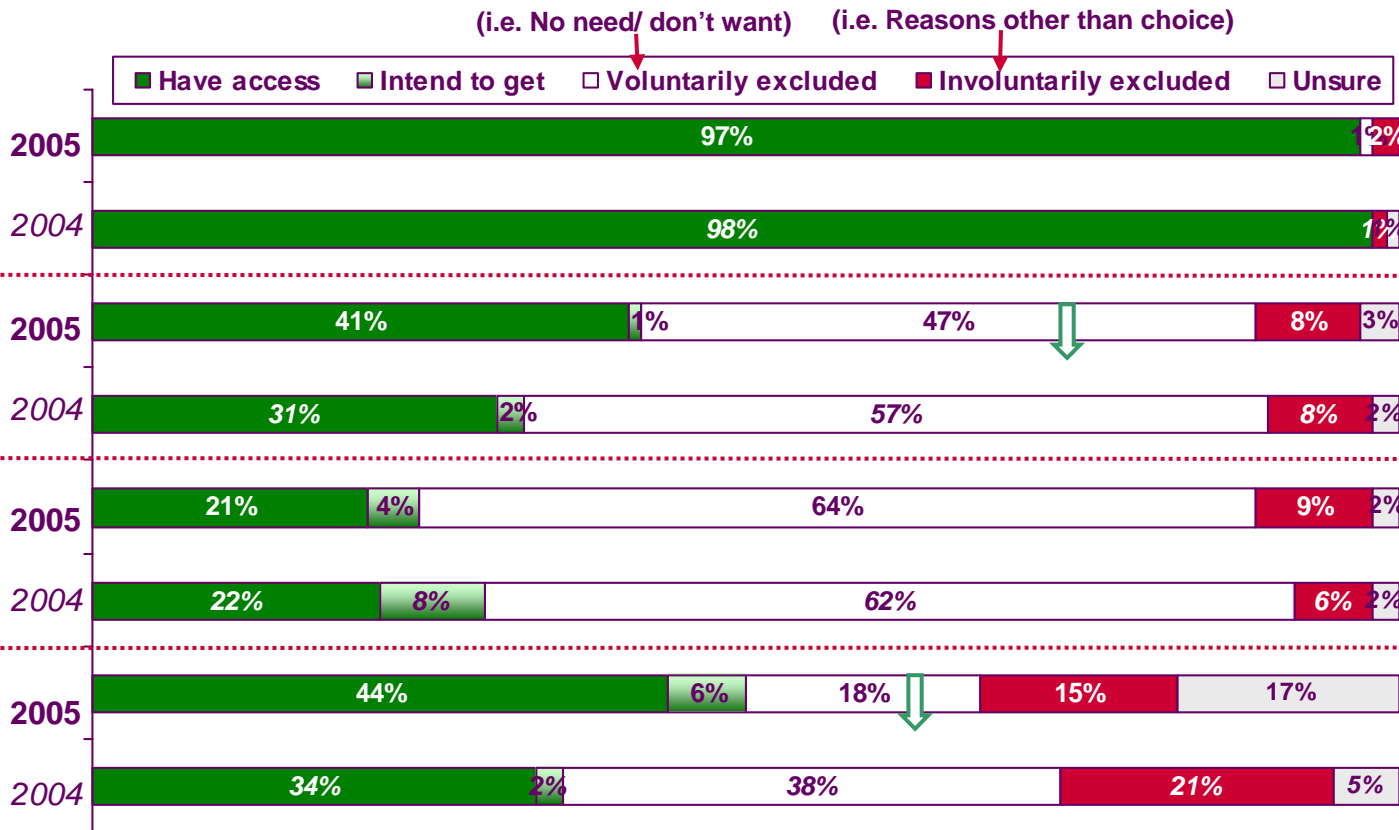
Ownership

Landline

Mobile

Internet

Digital TV



Indicates significantly lower or higher than 2004 people with disabilities aged 65+

- As found for older people with a disability, levels of involuntary exclusion for mobile phone services and digital TV services have fallen significantly amongst younger people with a disability since 2004

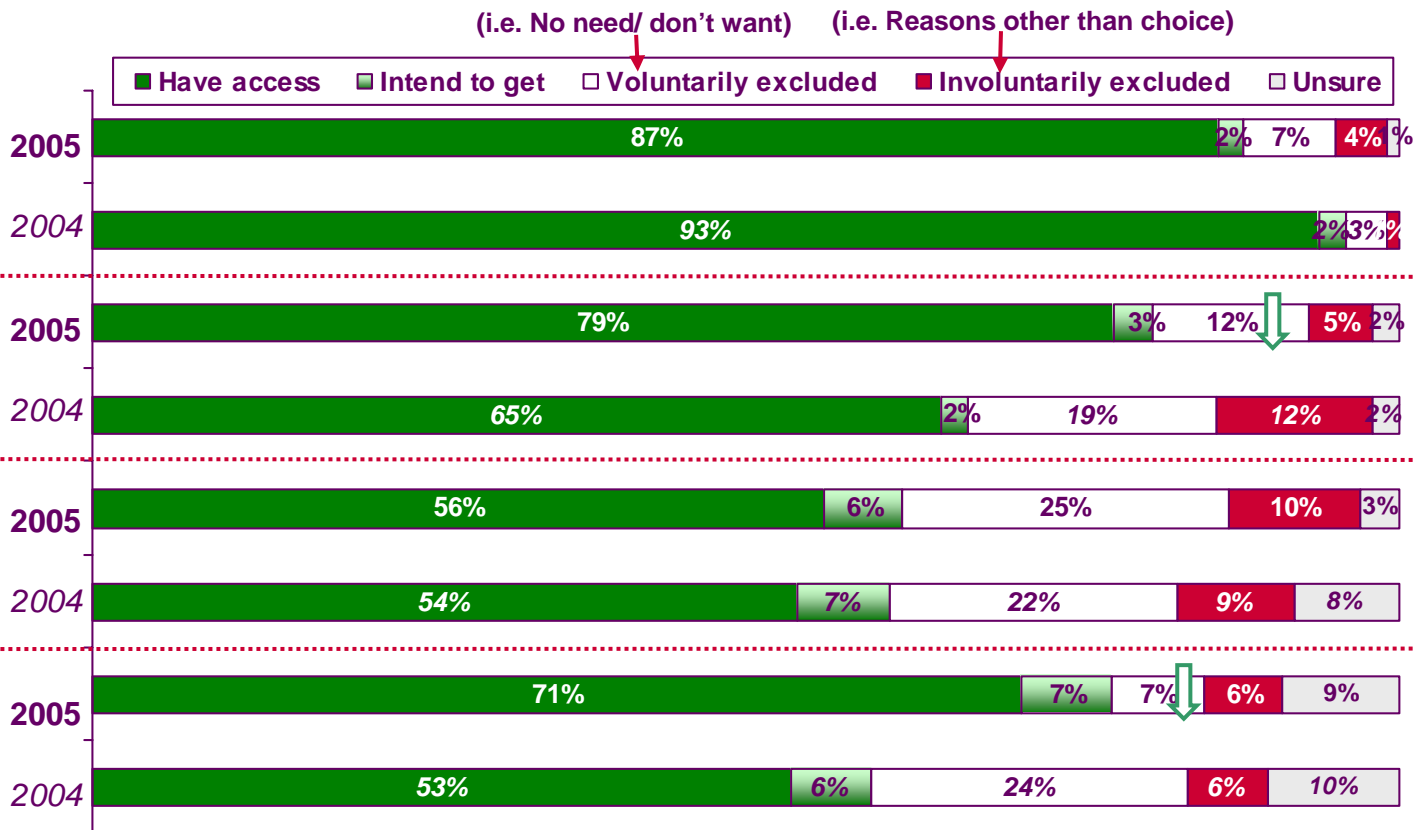
Ownership

Landline

Mobile

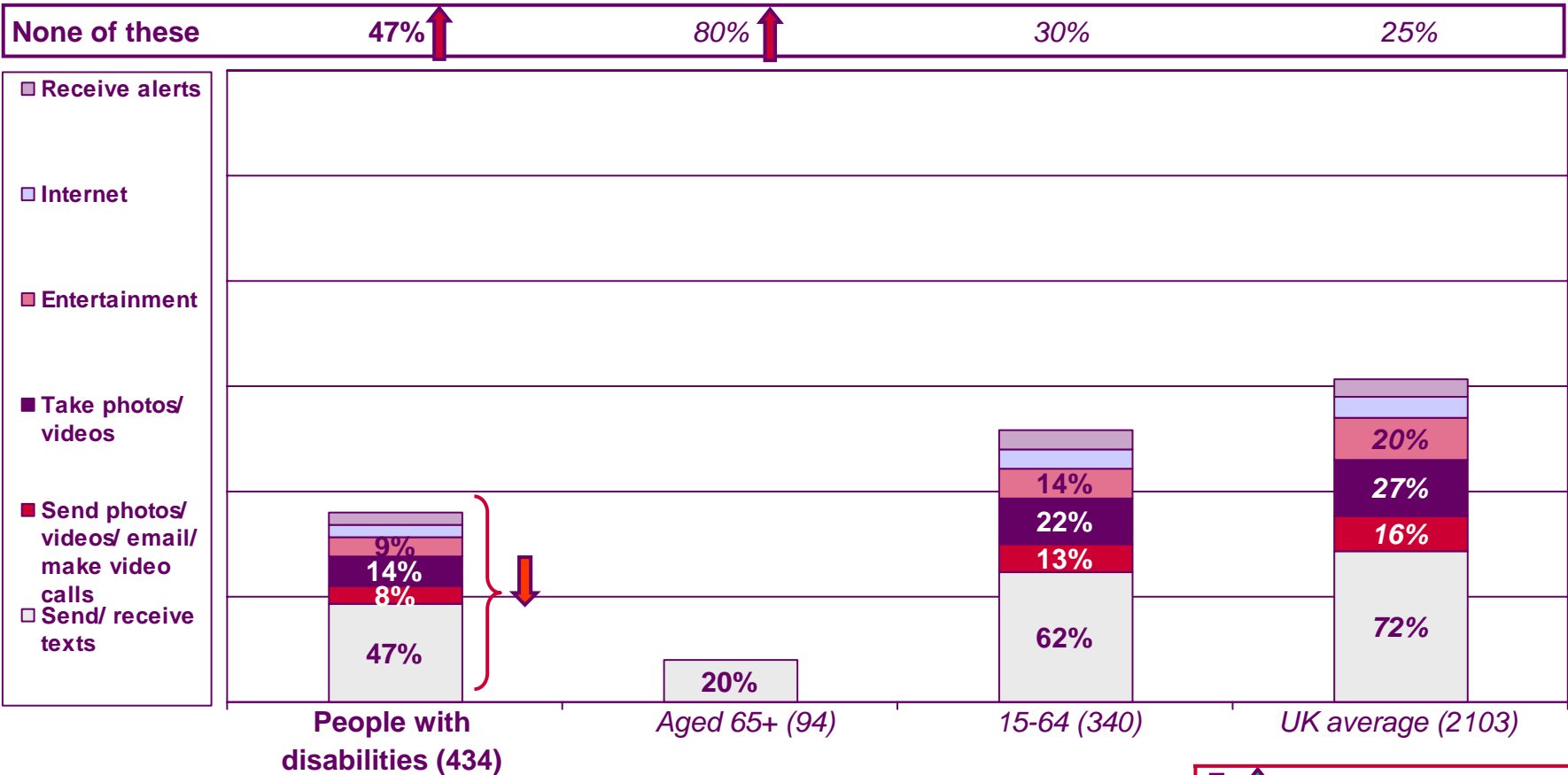
Internet

Digital TV



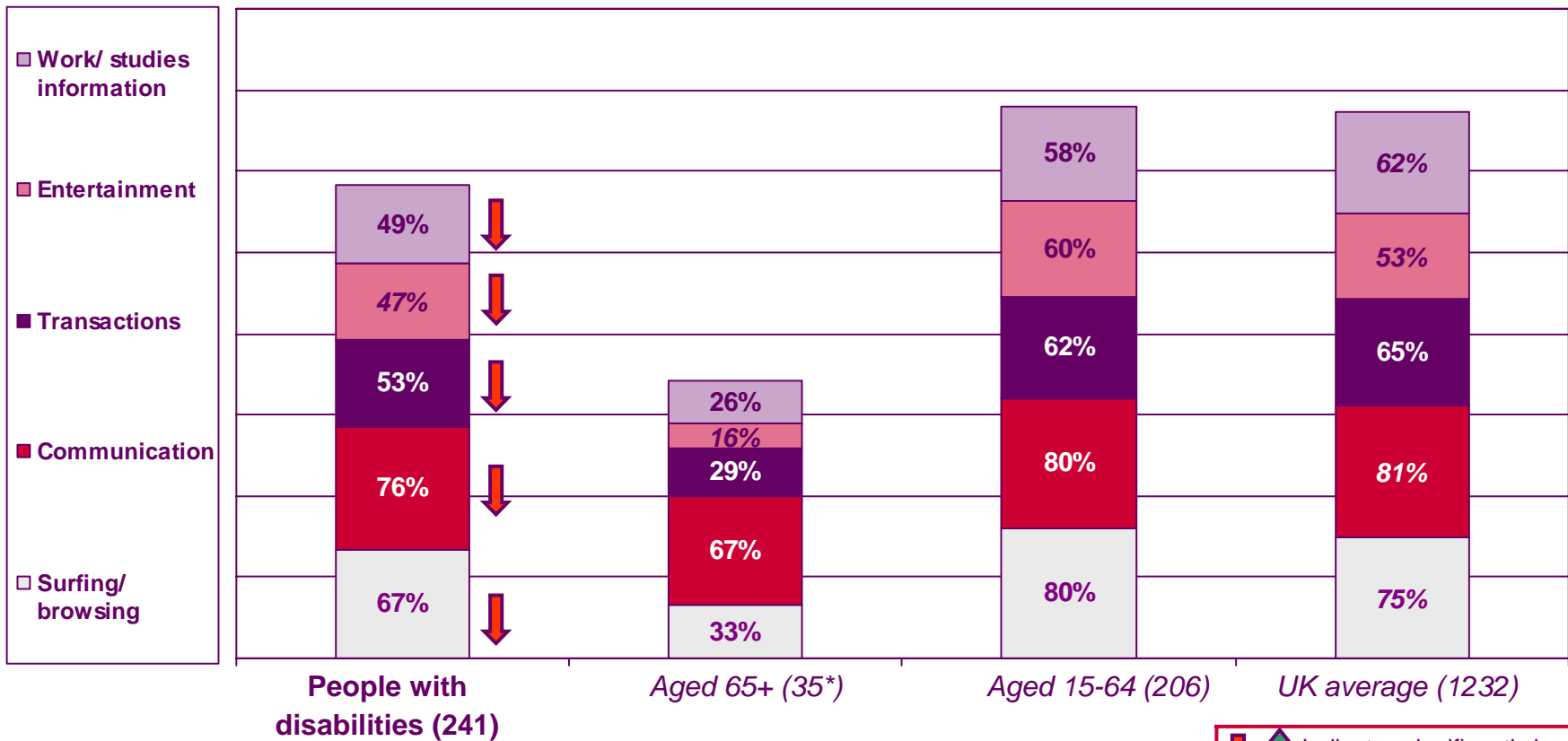
↑↓ Indicates significantly lower or higher than 2004 people with disabilities aged 15-64

- Amongst people with a disability a minority of mobile phone owners use their phone on a weekly basis for any of the uses shown - including sending and receiving text messages - with half of all mobile phone owners with a disability not making **any** of these uses on a weekly basis
- Age is a key discriminator, with younger people with a disability more likely to make any of these uses of their mobile phone



↓ ↑ Indicates significantly lower or higher than 2005 UK average

- Amongst people with a disability, those with internet access at home make a narrower use of the internet compared to the UK average, with lower use of the internet for each of the types of uses shown – most notably transactions (e.g. banking, shopping online) and finding/ downloading information for work/ studies.
- Again age is a key discriminator, and younger people with a disability do not differ from the UK average in terms of the uses made of the internet



↓ ↑ Indicates significantly lower or higher than 2005 UK average

Base : All with internet access at home NB: Low base size - treat as indicative only

- Amongst people with a disability with each type of service the average self-reported monthly spend is notably lower for the mobile phone service, but otherwise close to the UK average
- Change in spend compared to 2004 also differs from the UK average for mobile phones, but shows similar increases for the other services

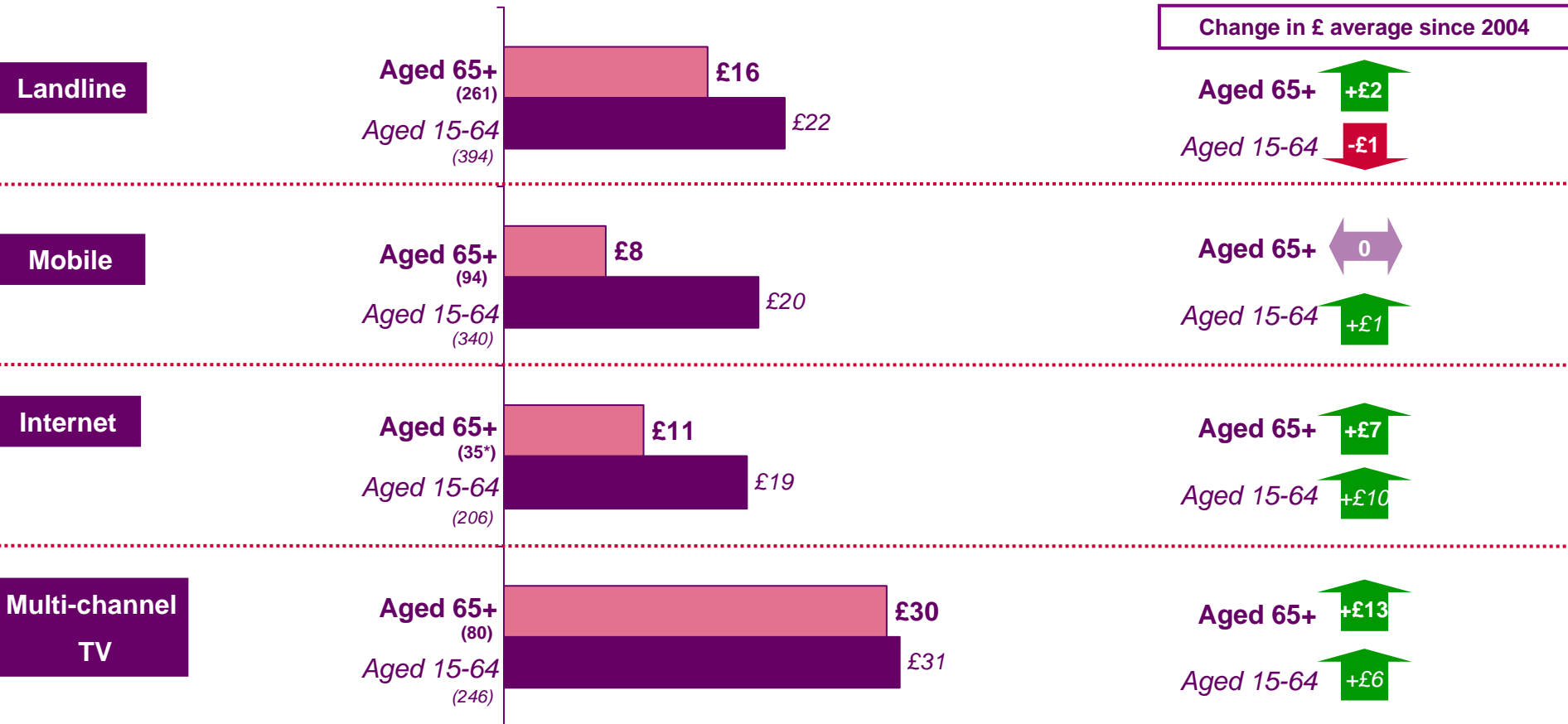
Usage



Base : Owners of each type of device/ service

- Compared to people with a disability overall, average monthly spend is notably lower amongst older people with a disability for each of the services, with the exception of multi-channel TV
- Since 2004 older and younger people with a disability have shown an increased spend for the internet and multi-channel TV

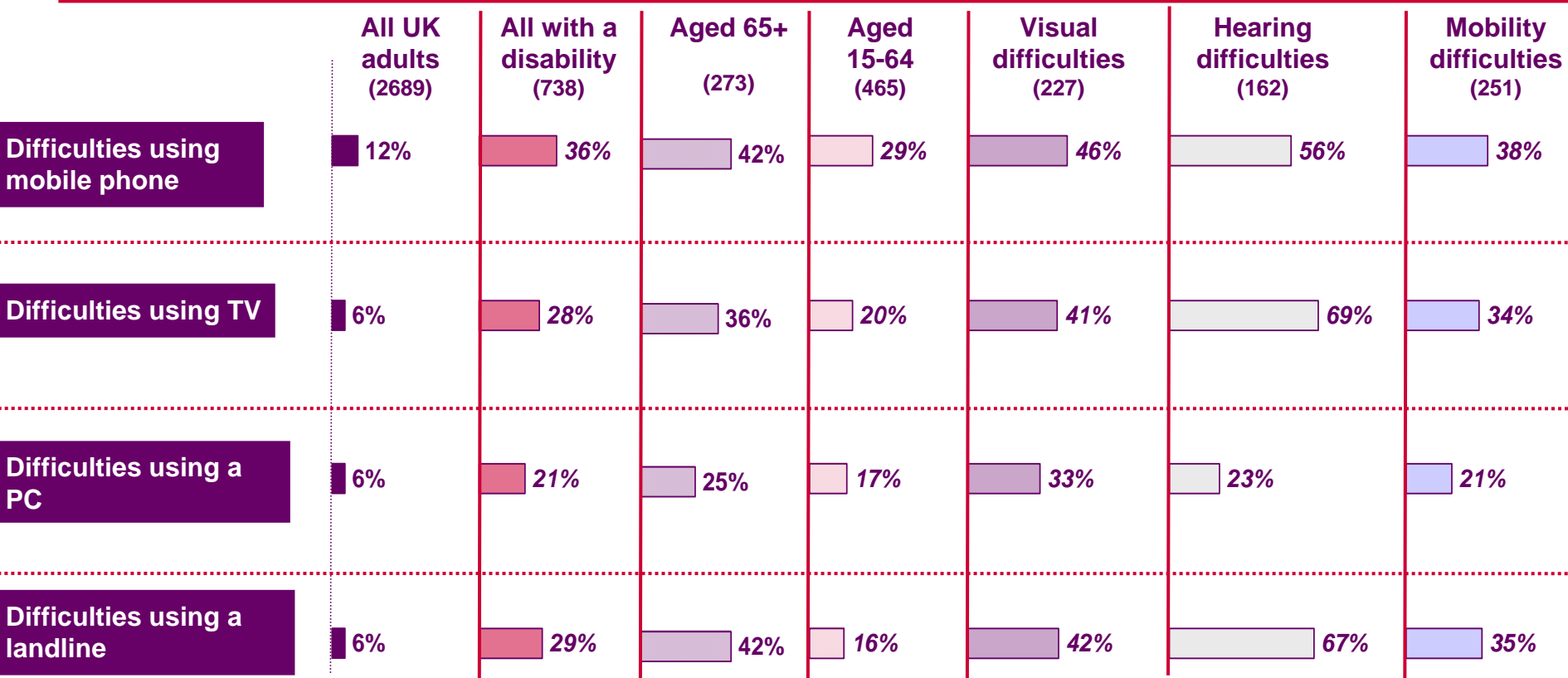
Usage



Base : Owners of each type of device/ service NB: Low base size - treat as indicative only

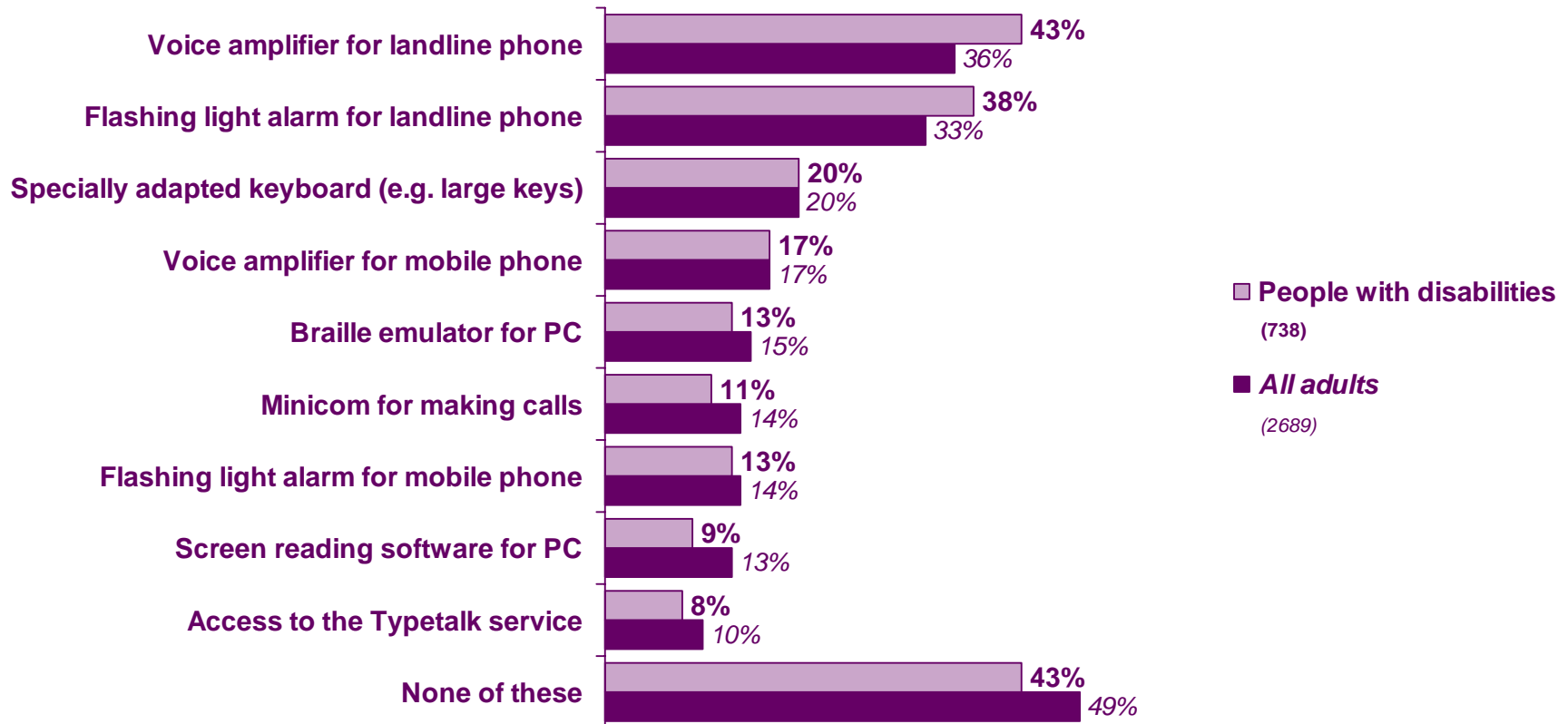
Usage

- Amongst all people with a disability mobile phones appear to attract the highest levels of stated difficulties – reported by one in three people with a disability, compared to around one in ten of all adults
- Older people with a disability are more likely to report difficulties using any of these home communication technologies than younger people with a disability
- Those with hearing difficulties are more likely to report any difficulties using a mobile phone, TV or landline, which those with visual difficulties are the most likely to report any difficulties using a PC

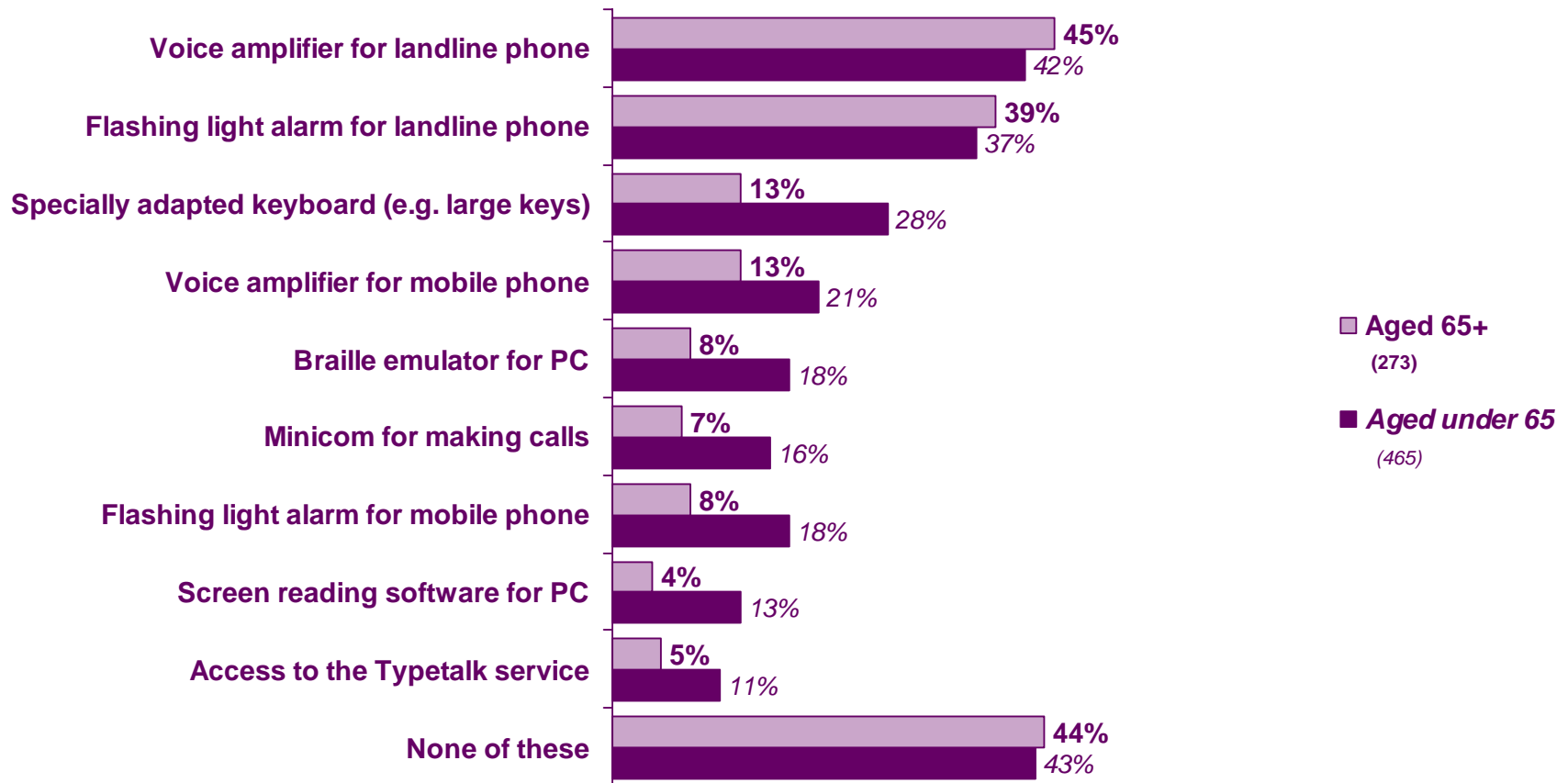


Base: All respondents with a disability (738) and UK overall (2,689)

- Amongst all people with a disability, a minority are aware of the individual types of specialist equipment to assist with the use of landline phones, mobile phones and personal computers listed below. In all, three in five people with a disability know of any of these types of equipment, compared to half of all adults.
- Awareness is generally higher amongst those with mobility difficulties

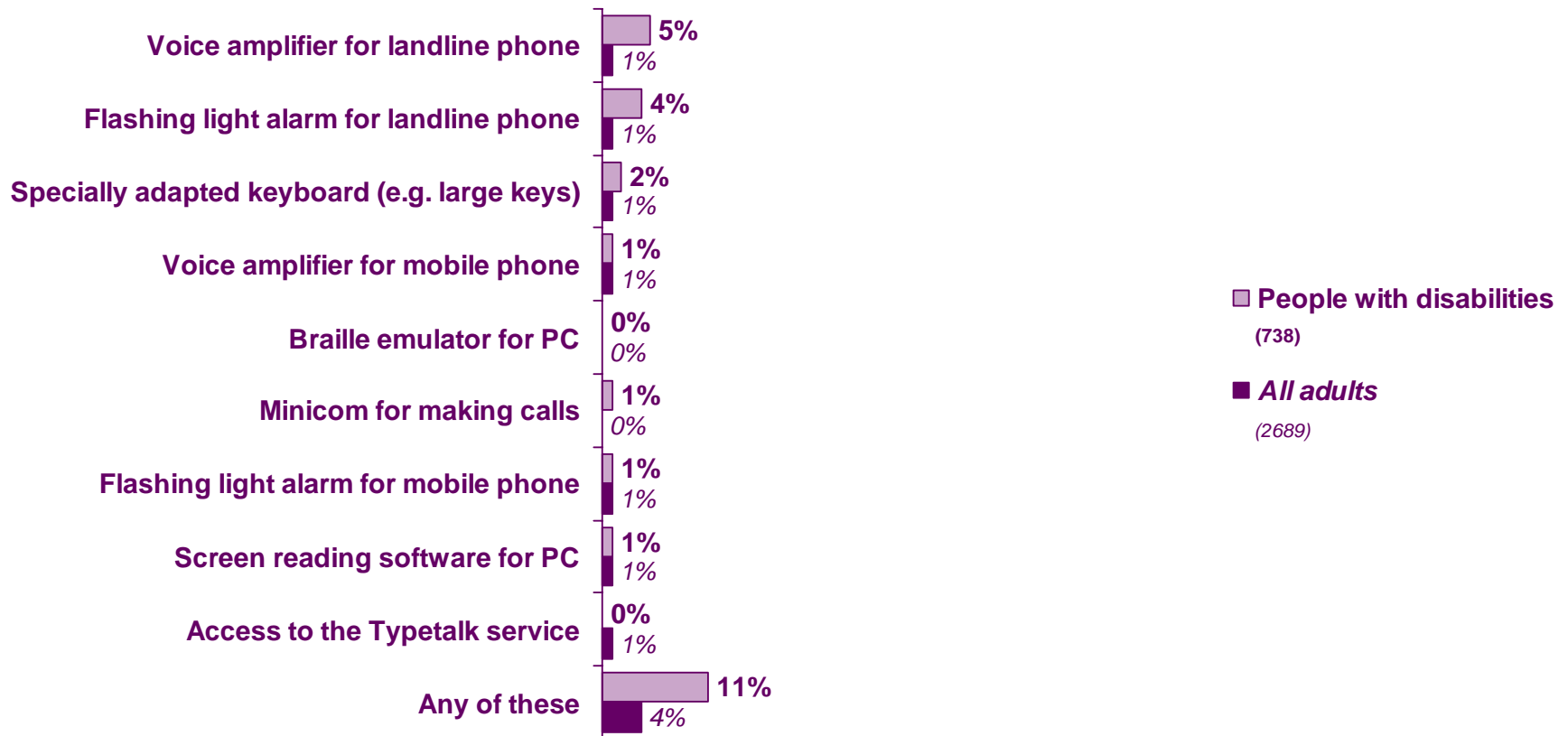


- Awareness is generally higher amongst younger people with a disability regarding equipment relating to mobile phones and PCs

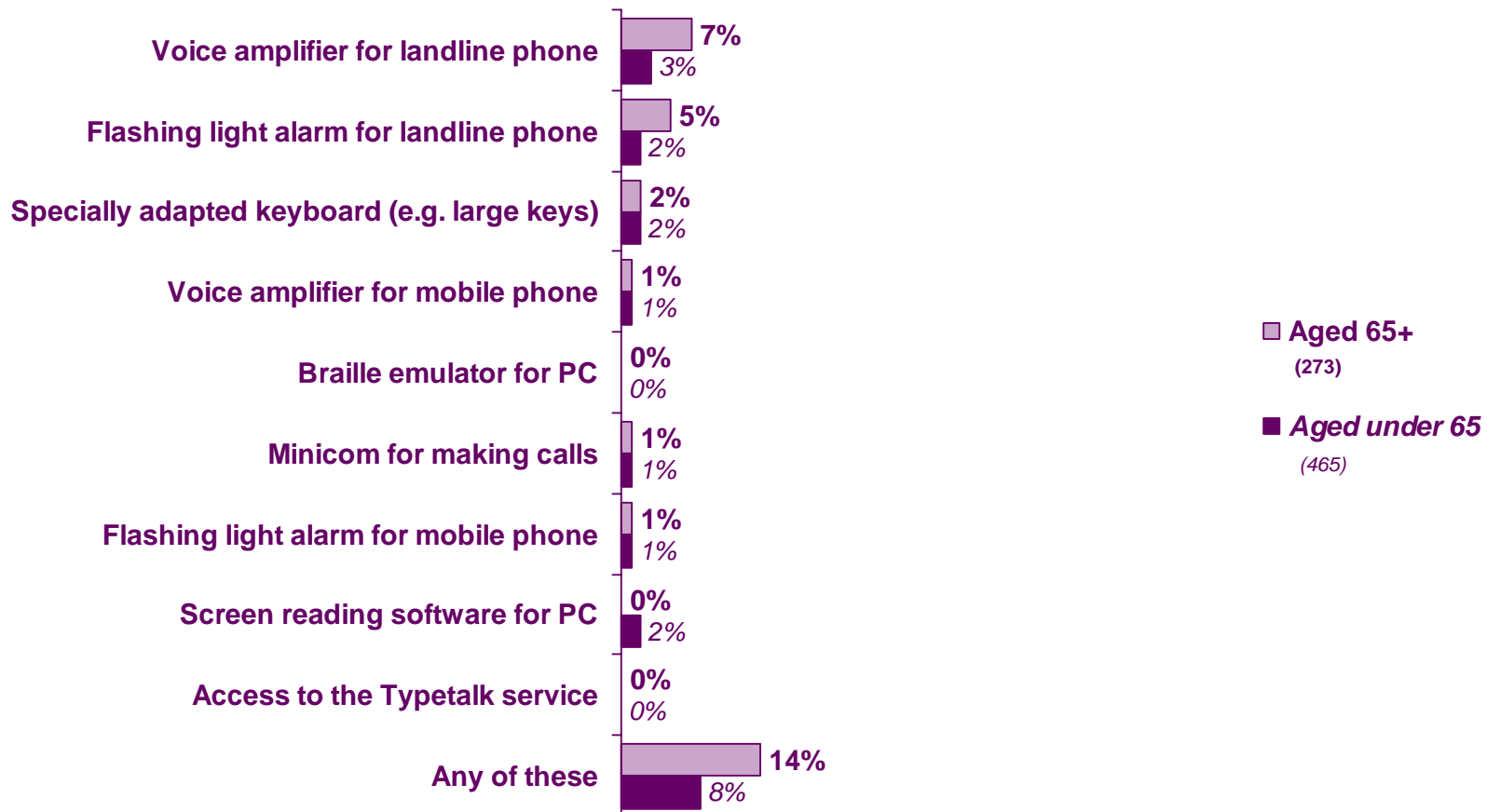


↓ ↑ Indicates significantly lower or higher than 2005 people with disabilities

- One in ten of all people with a disability own any of the individual types of specialist equipment to assist with the use of landline phones, mobile phones and personal computers. Ownership is most common amongst those with hearing difficulties (23% owning any) and least common amongst those with visual difficulties (13% owning any)



- Older people with a disability are slightly more likely to own specialist equipment than younger people with a disability



Landline (655)

- 39% have any concerns or worries (30% for UK)
- 20% costs
- 13% privacy (unsolicited calls)

Higher level of reported concerns amongst older people

Increased from 27% with any concerns or worries in 2004

Mobile phone (434)

- 25% have any concerns or worries (31% for UK)
- 13% costs
- 3% unsolicited calls/ texts
- 3% health issues

Higher level of reported concerns amongst younger people

No real change from 23% with any concerns or worries in 2004

Internet (241)

- 34% have any concerns or worries (41% for UK)
- 19% spam/ pop-ups/ viruses/ control
- 14% security

Higher level of reported concerns amongst younger people

No real change from 32% with any concerns or worries in 2004

Digital TV (326)

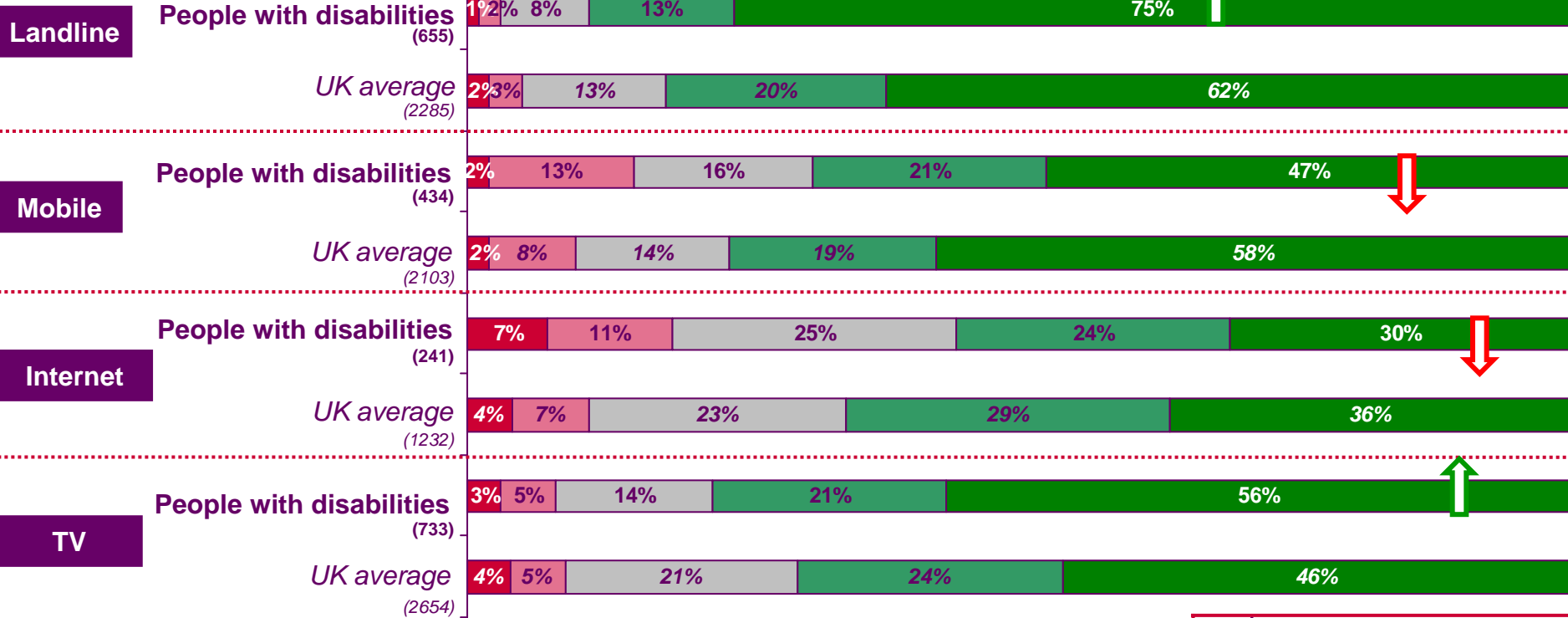
- 26% have any concerns or worries (24% for UK)
- 14% costs
- 7% poor quality content
- 4% choice/ access

Little variation in level of reported concerns

Increased from 18% with any concerns or worries in 2004

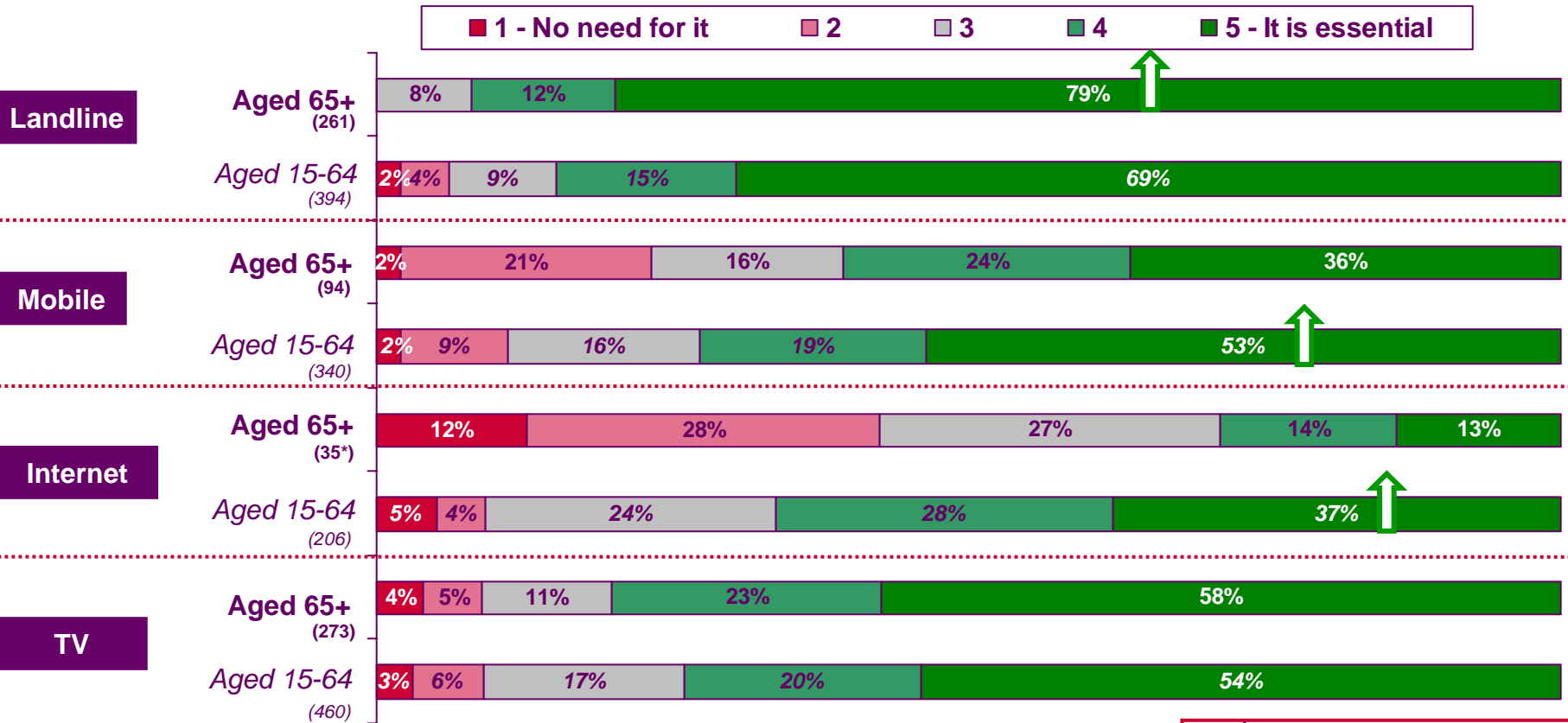
- Amongst people with a disability who own each type of device/ service landline phones are the most likely to be considered essential, followed by the TV service, with a minority of internet owners rating this service as being essential
- Compared to owners across the UK, people with a disability are more likely to consider their landline and TV services to be essential and less likely to consider their mobile phone and internet services to be essential

Attitudes



↑ ↓ Indicates significantly lower or higher than 2005 UK average

- Compared to younger people with a disability, older people with a disability are more likely to consider their landline phone essential, while younger people with a disability are more likely to consider their mobile phone and the internet essential



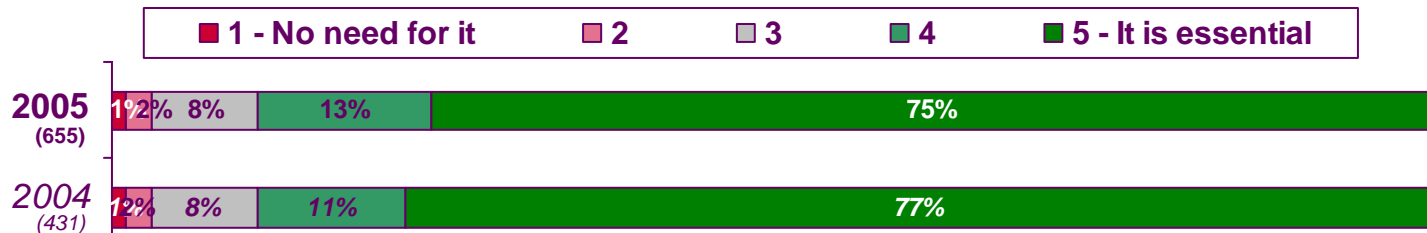
Base: Owners of each type of device/ service NB: Low base size - treat as indicative only

↑ ↓ Indicates significantly lower or higher than 2005 people with disabilities

- Compared to 2004 there are few changes in the perceived importance of services amongst people with a disability, but 2005 sees people with a disability more likely to consider their mobile phone service to be essential
- Across the UK there has also been a decrease in rating landline phones as essential, which is not seen amongst people with a disability.

Attitudes

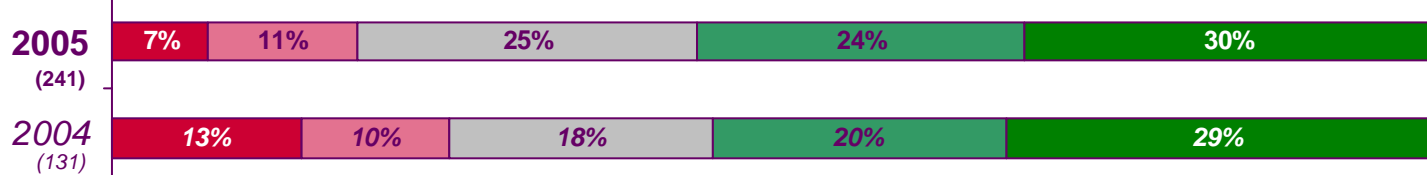
Landline



Mobile



Internet

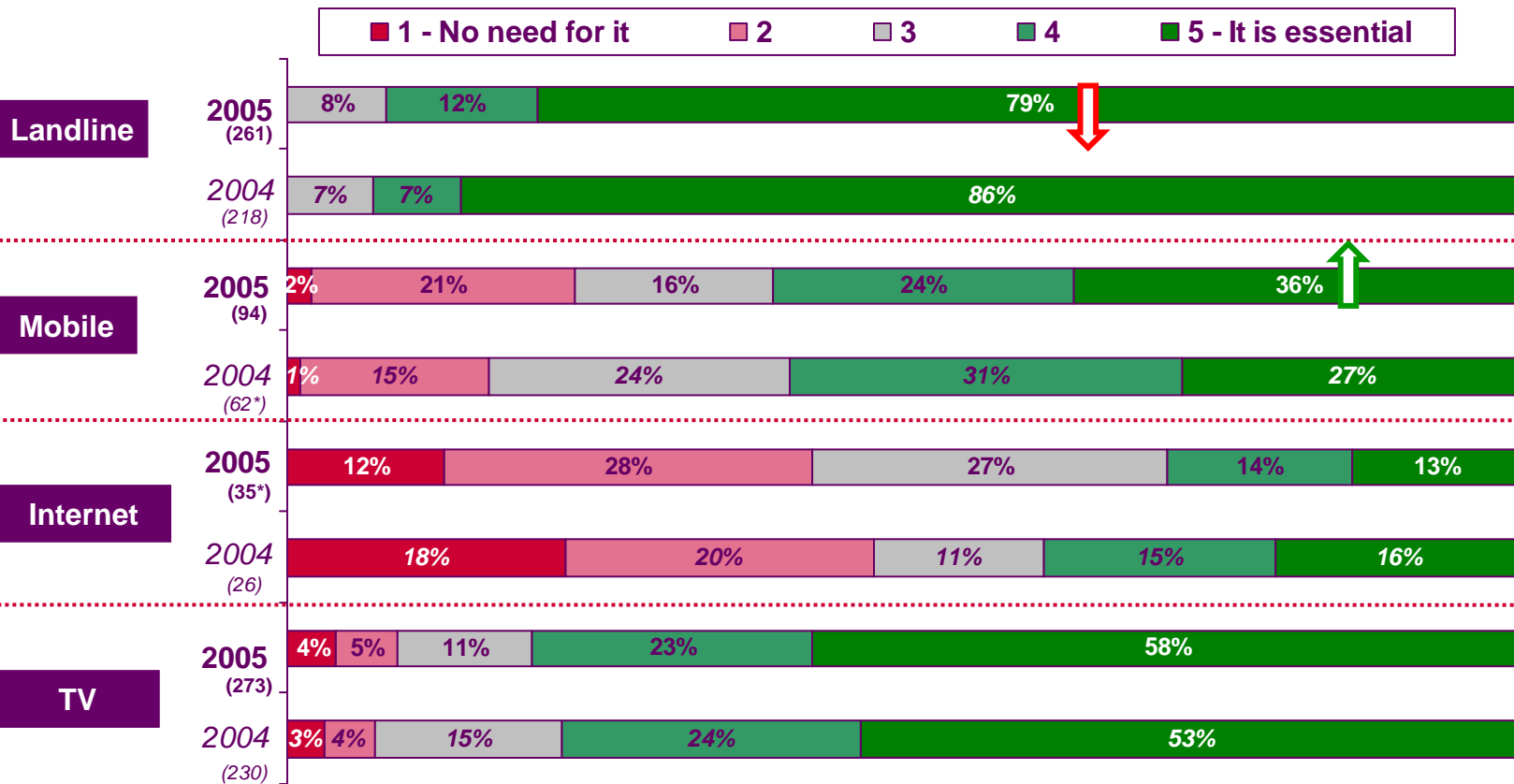


TV



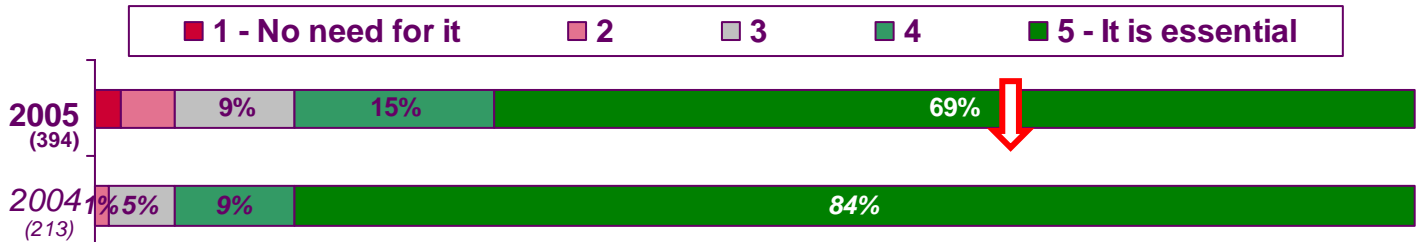
↓ ↑ Indicates significantly lower or higher than 2004 people with disabilities

- Compared to 2004 there has been a significant decrease in the proportion of older people with a disability rating their landline phone service as essential, and a significant increase in those who consider their mobile phone service to be essential

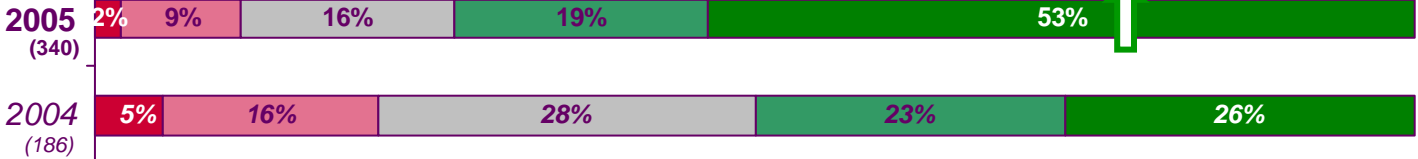


• Amongst younger people with a disability the importance of owning a landline phone has fallen significantly, but the proportion rating their mobile phone, internet and TV services as essential has increased significantly since 2004

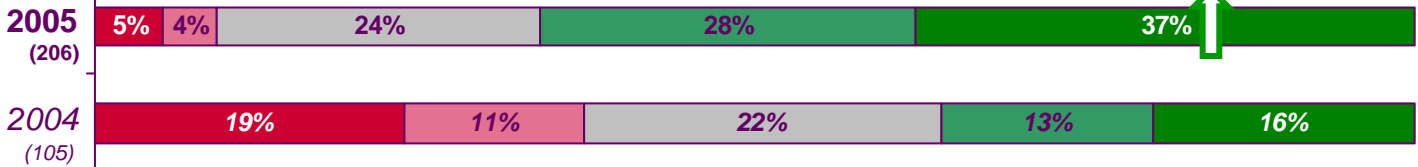
Landline



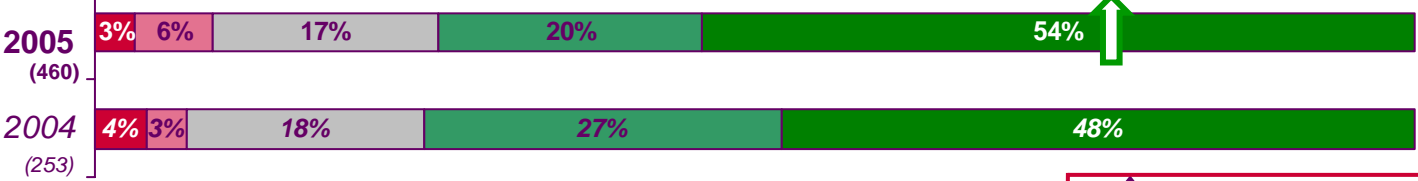
Mobile



Internet



TV



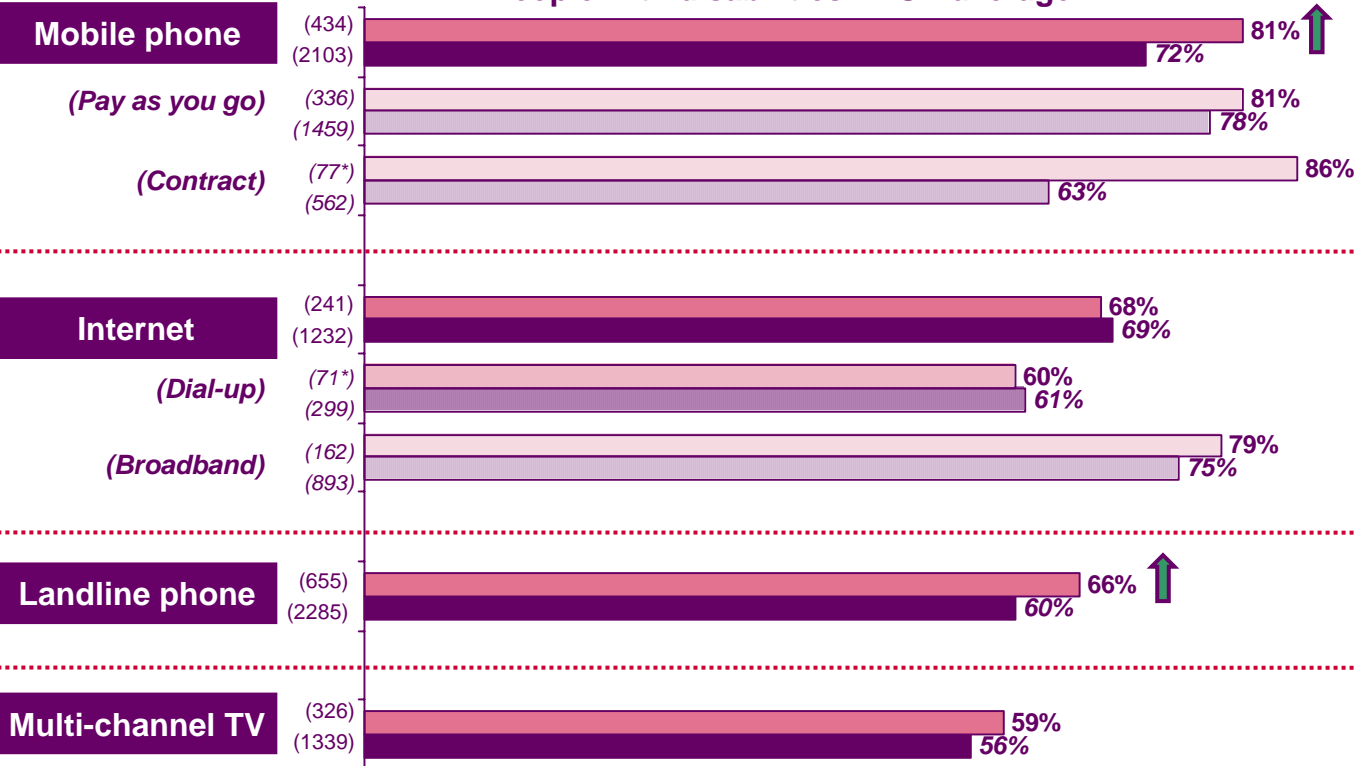
↑↓ Indicates significantly lower or higher than 2004 people with disabilities aged 15-64

- The mobile phone service is the most likely to be rated as providing good value by owners of each type of device/ service amongst people with a disability, with similar ratings for the internet and landline phone services, and the lowest ratings for the TV service. Contract mobile phone customers and broadband internet users assign higher 'good value' ratings than pay as you go customers and dial-up internet users
- Value ratings from people with a disability have increased significantly since 2004 for mobile phones, but most notably for the internet, perhaps as a result of the increase in the use of broadband

Attitudes

% owners rating each as 'good value'

■ People with disabilities ■ UK average



Change in % since 2004 for people with disabilities

+6

+22

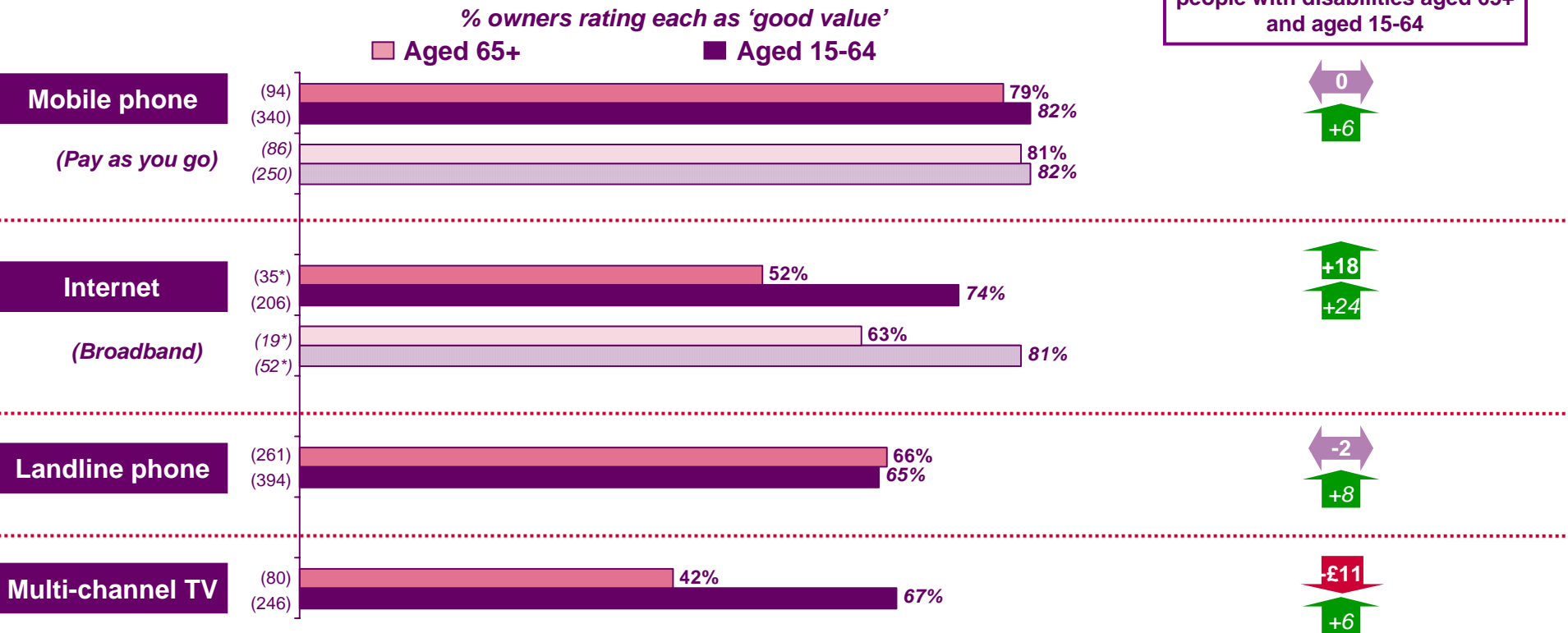
+3

+1

↑ Indicates significantly lower or higher than 2005 UK average

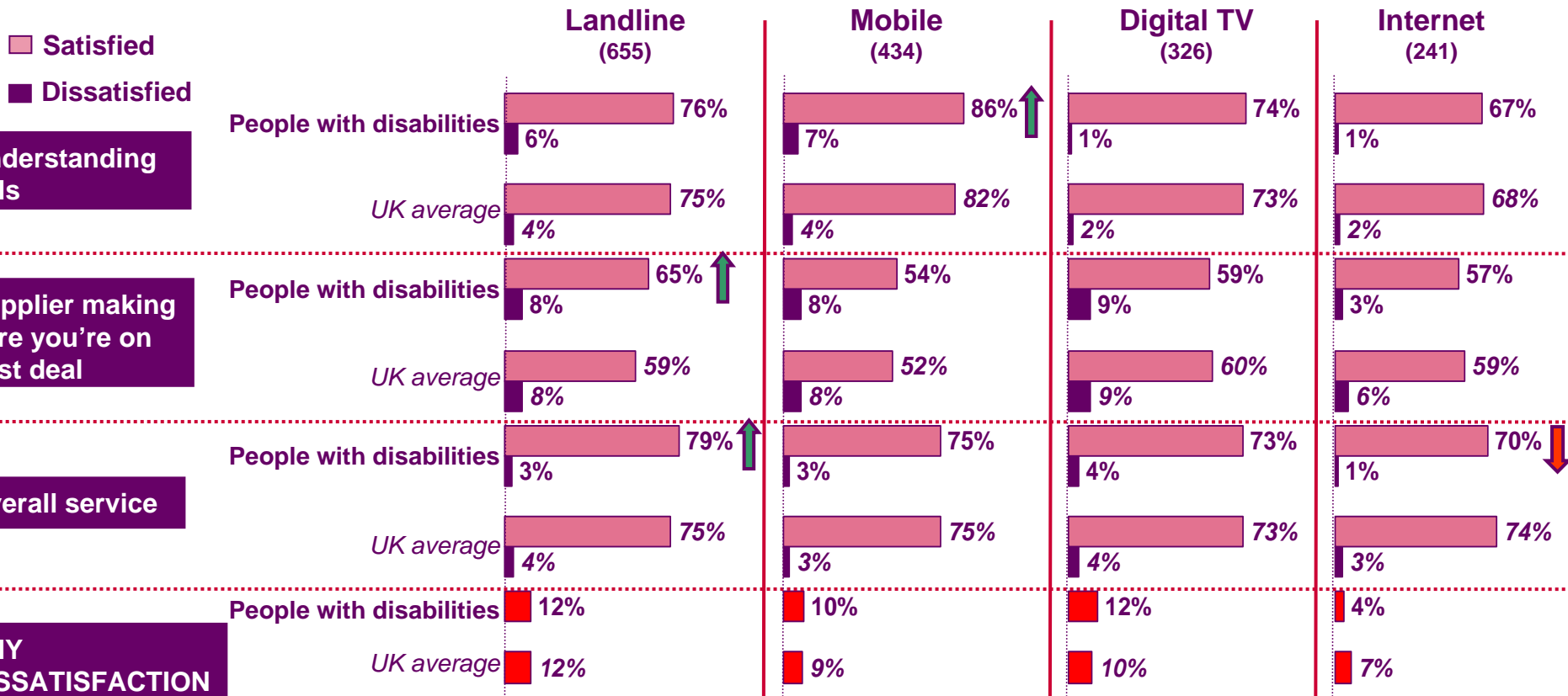
- The proportion of younger people with a disability rating their multi-channel TV service as 'good value' is significantly higher than older people with a disability, and above average for people with a disability overall.
- Value ratings from younger people with a disability have increased significantly since 2004 for all services, but most notably for the internet

Change in % since 2004 for
people with disabilities aged 65+
and aged 15-64



- Amongst people with a disability who own each type of service/ device satisfaction with the overall service provided is highest for landline and lowest for the internet service. For both of these less well rated services, older people with a disability are more likely to give a neutral or 'don't know' response, and so levels of dissatisfaction are not higher as a result.
- Few aspects of service differ from the UK average

Attitudes



↑ Indicates significantly higher than 2005 UK average
↓ Indicates significantly lower than 2005 UK average

Older people with a disability are generally more satisfied with their landline service than younger people with a disability. Younger people with a disability show higher levels of satisfaction with their mobile phone and digital TV services.

Attitudes

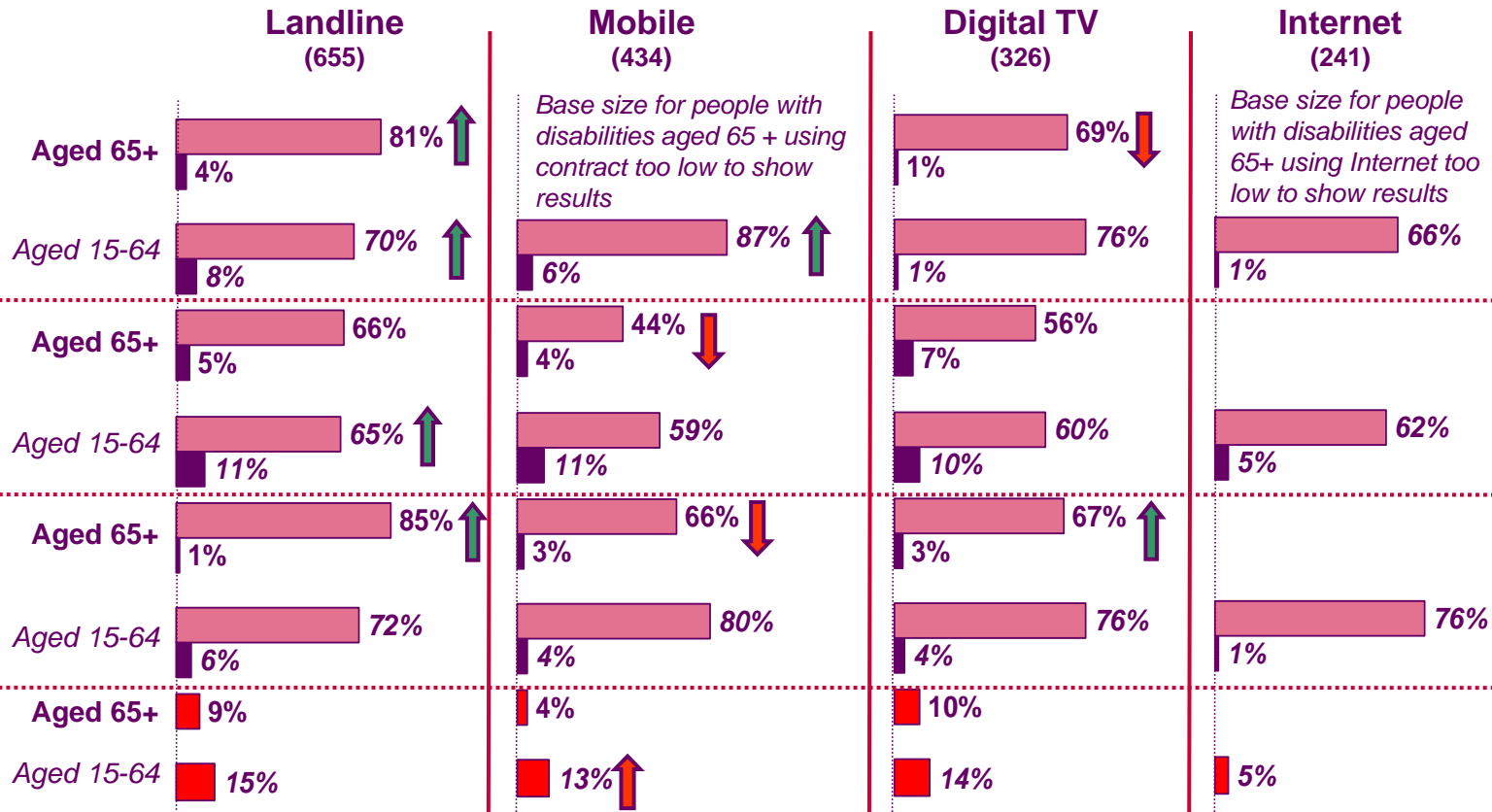
Satisfied
Dissatisfied

Understanding bills

Supplier making sure you're on best deal

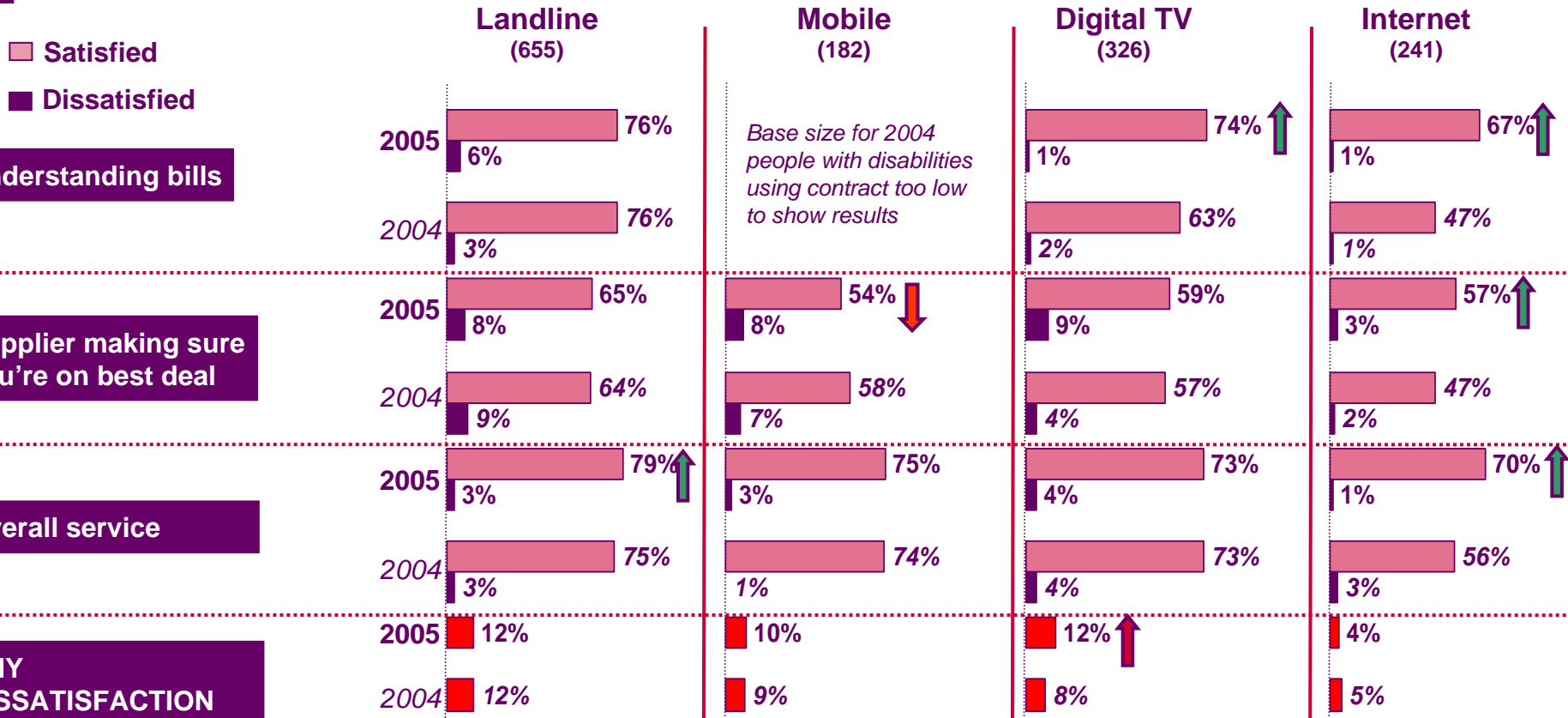
Overall service

ANY DISSATISFACTION



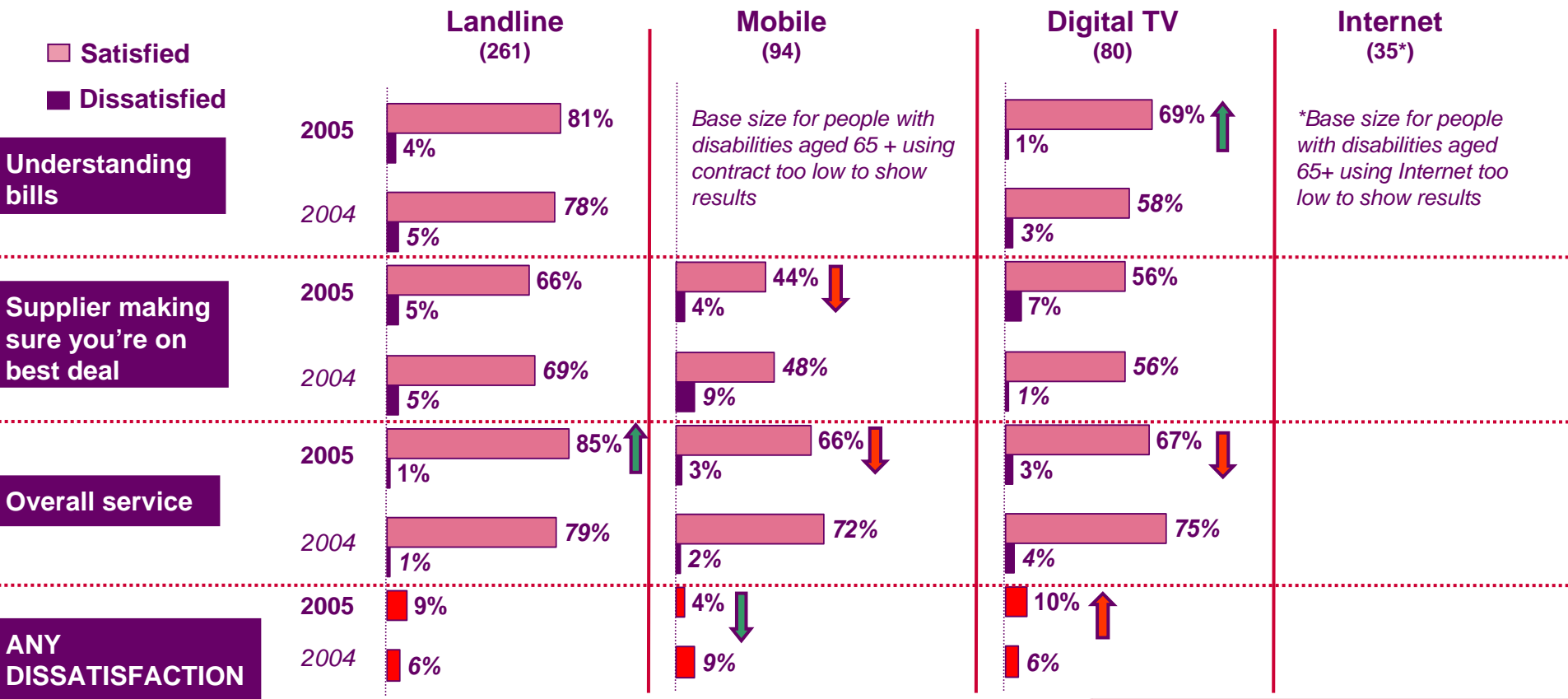
↑ ↓ Indicates significantly lower or higher than 2005 people with disabilities

- Amongst people with a disability there are mostly few changes since 2004 in terms of satisfaction with services and suppliers, but the internet service sees increases in satisfaction with all aspects of service



↑ ↓ Indicates significantly lower or higher than 2004 people with disabilities

• Amongst older people with a disability satisfaction with the overall service provided by their landline supplier has increased significantly, but has fallen significantly for their mobile phone and digital TV services



↑ ↓ Indicates significantly lower or higher than 2004 people with disabilities aged 65+

- Amongst younger people with a disability there have been significant changes in terms of satisfaction with all aspects of the service provided by their internet service supplier
- There have been significant increases in the proportion of younger people with a disability with any dissatisfaction with their mobile phone and digital TV services

Attitudes

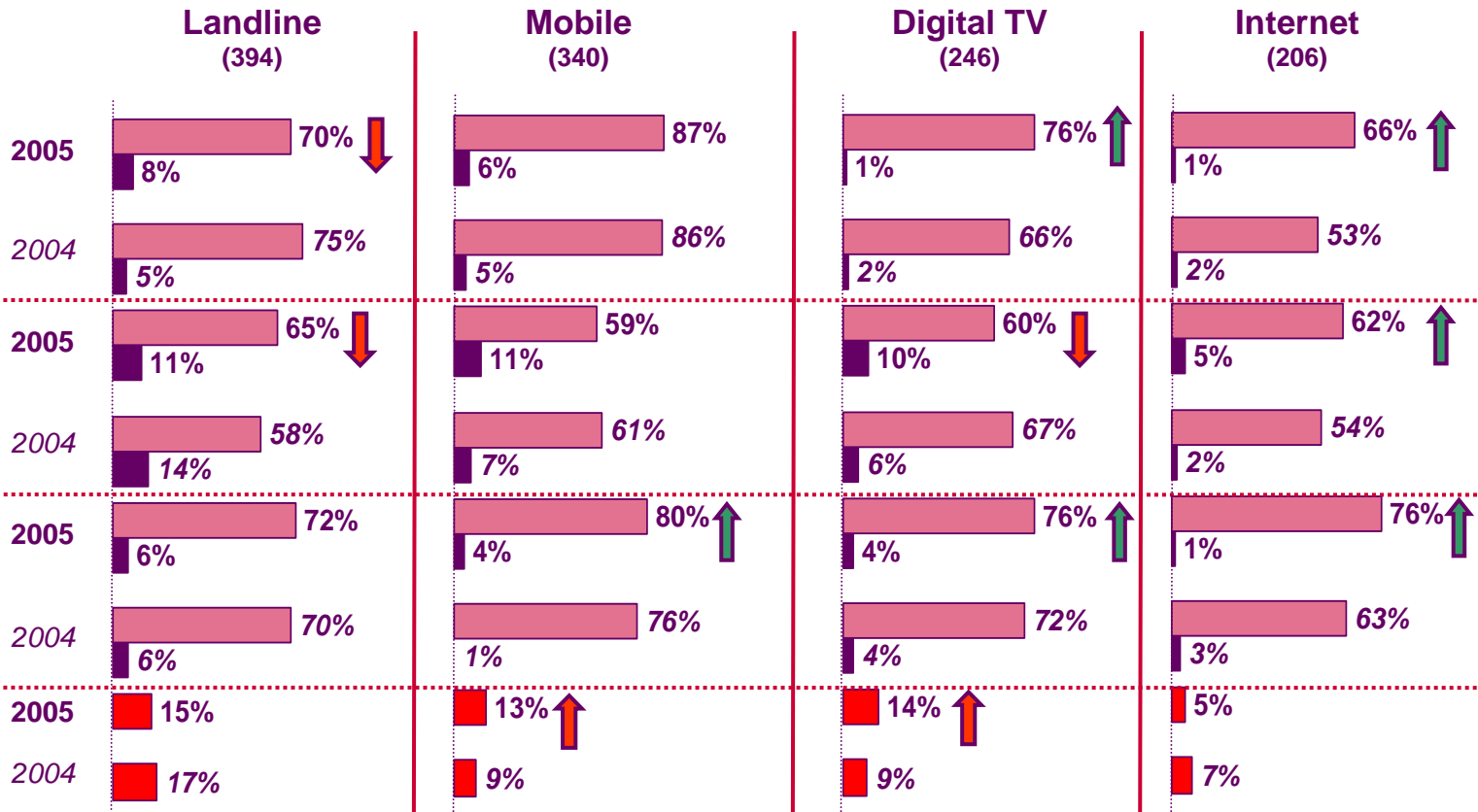
■ Satisfied
■ Dissatisfied

Understanding
bills

Supplier making
sure you're on
best deal

Overall service

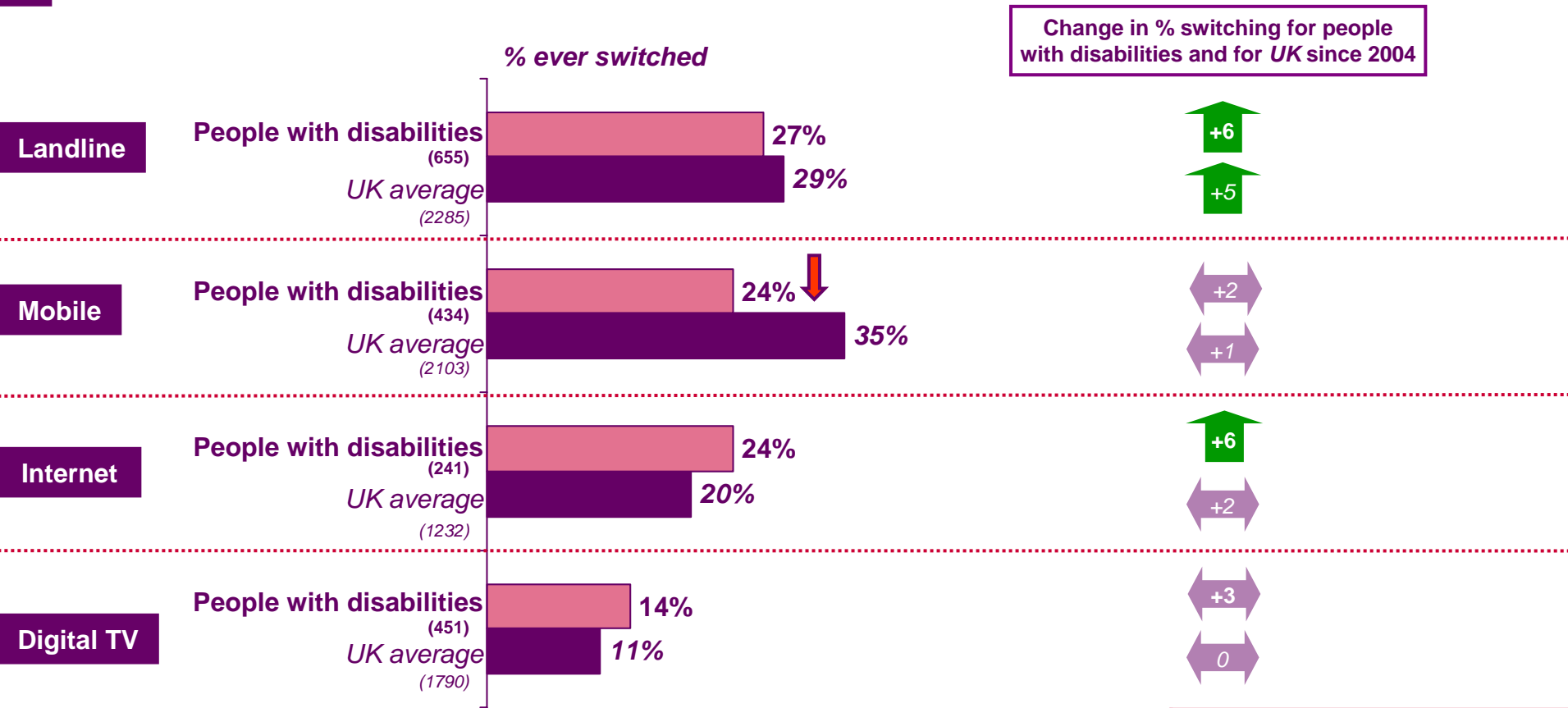
ANY
DISSATISFACTION



↑ ↓ Indicates significantly lower or higher than 2004 people with disabilities aged 15-64

- People with a disability show similar levels of ever having switched suppliers for their landline and mobile phone services and internet service, with the incidence of having ever changed the company used for the landline service and internet service showing an increase since 2004

Switching

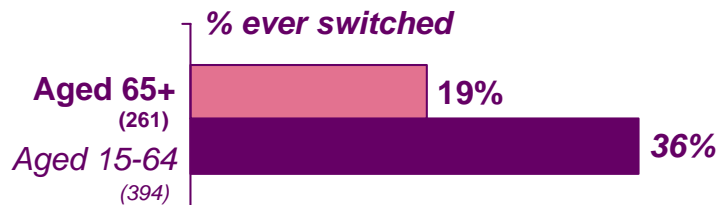


- For each of the services, younger people with a disability are more likely to have ever switched supplier
- The incidence of ever having switched supplier has increased significantly for landline, mobile and internet amongst both age groups, and digital TV for older people with a disability

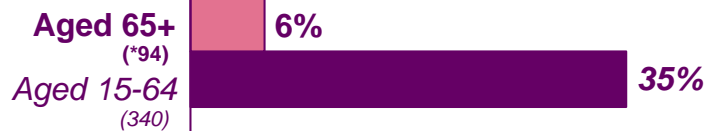
Change in % switching for people with disabilities
aged 65+ and aged 15-64 since 2004

Switching

Landline



Mobile



Internet



Digital TV



↑ ↓ Indicates significantly lower or higher than 2005 people with disabilities

- A minority of all people with a disability with a mobile phone ever check whether they are on the best tariff or deal, with this being significantly less common than for the UK overall
- Those with a contract phone are considerably more likely to ever check, with responses from people with a disability with a contract phone matched the UK average

Usage

All mobile

People with disabilities (434)

Yearly or more often Less often Never Don't know

% ever check compared to UK average



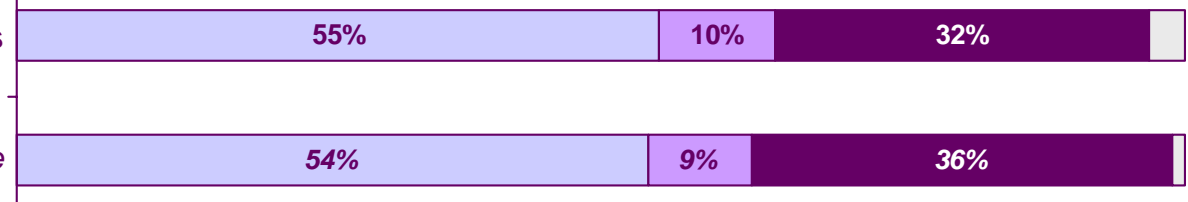
Prepay

People with disabilities (336)



Contract

People with disabilities (77*)



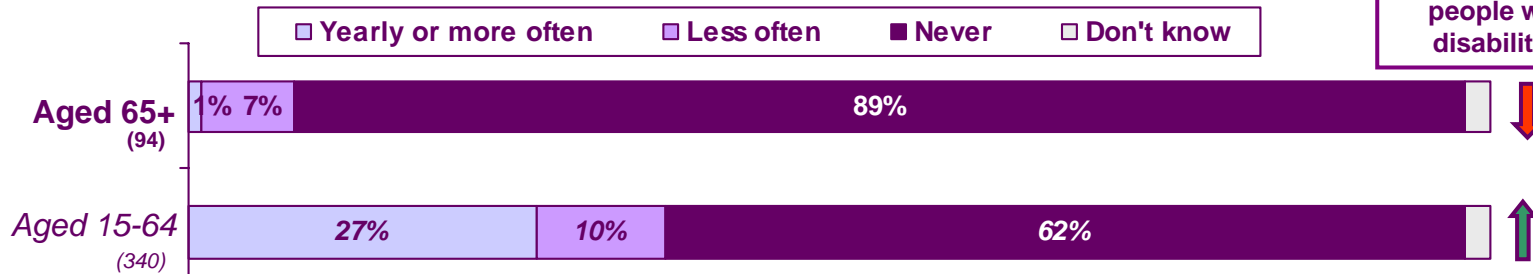
↓ ↑ Indicates significantly lower or higher than 2005 UK average

- Young people with a disability with a mobile phone are more likely to have ever checked whether they are on the best tariff or deal, particularly those with a contract phone
- Only a minority of older people with a disability with a mobile phone have ever checked

Usage

% ever check compared to people with disabilities

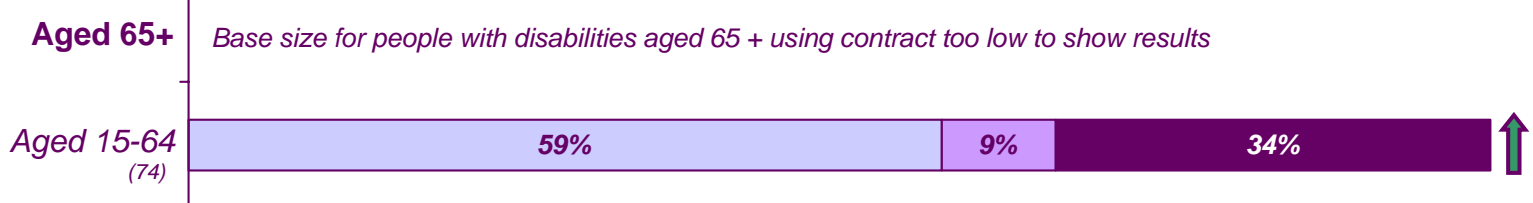
All mobile



Prepay

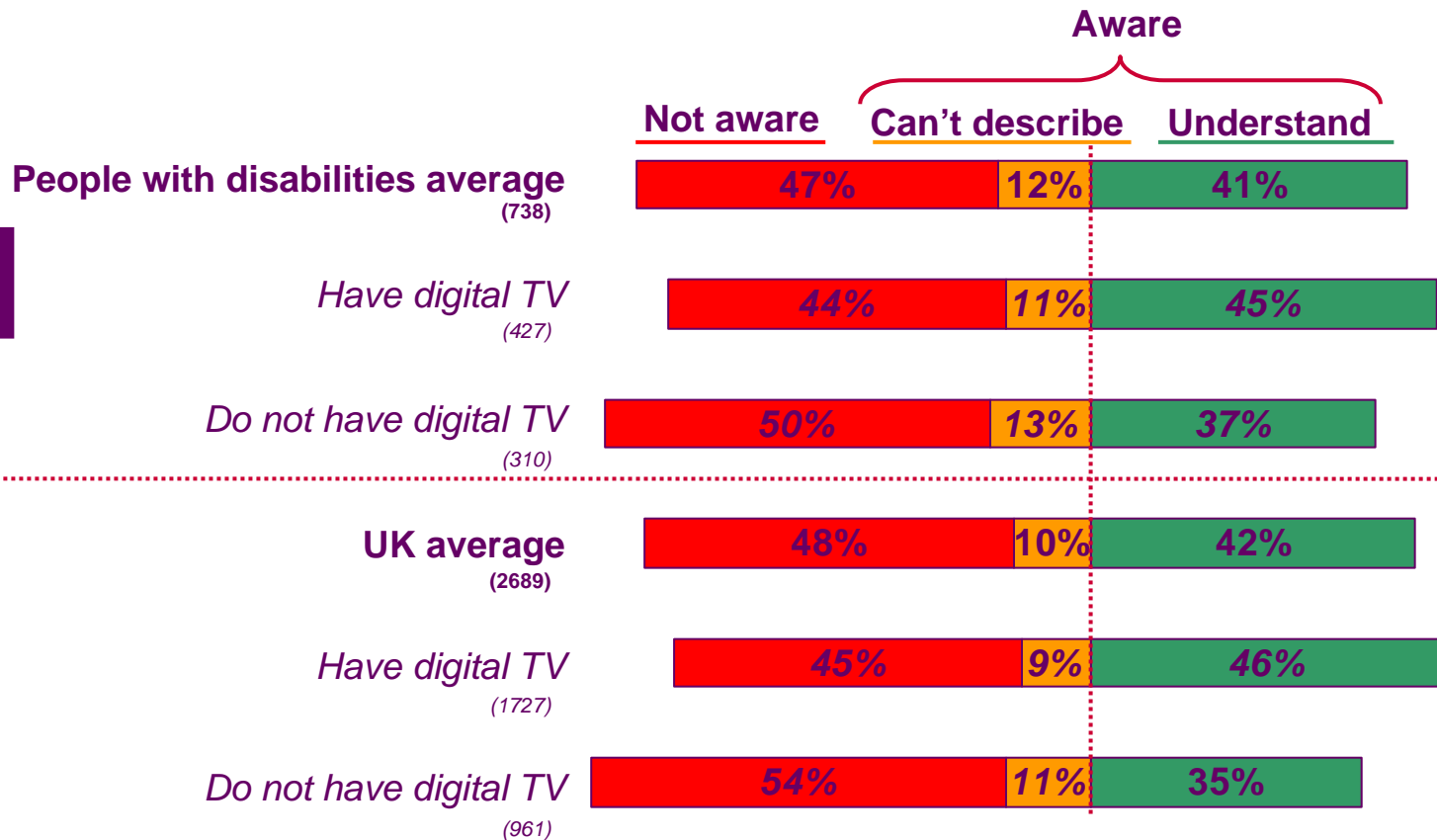


Contract



↑ ↓ Indicates significantly lower or higher than 2005 people with disabilities

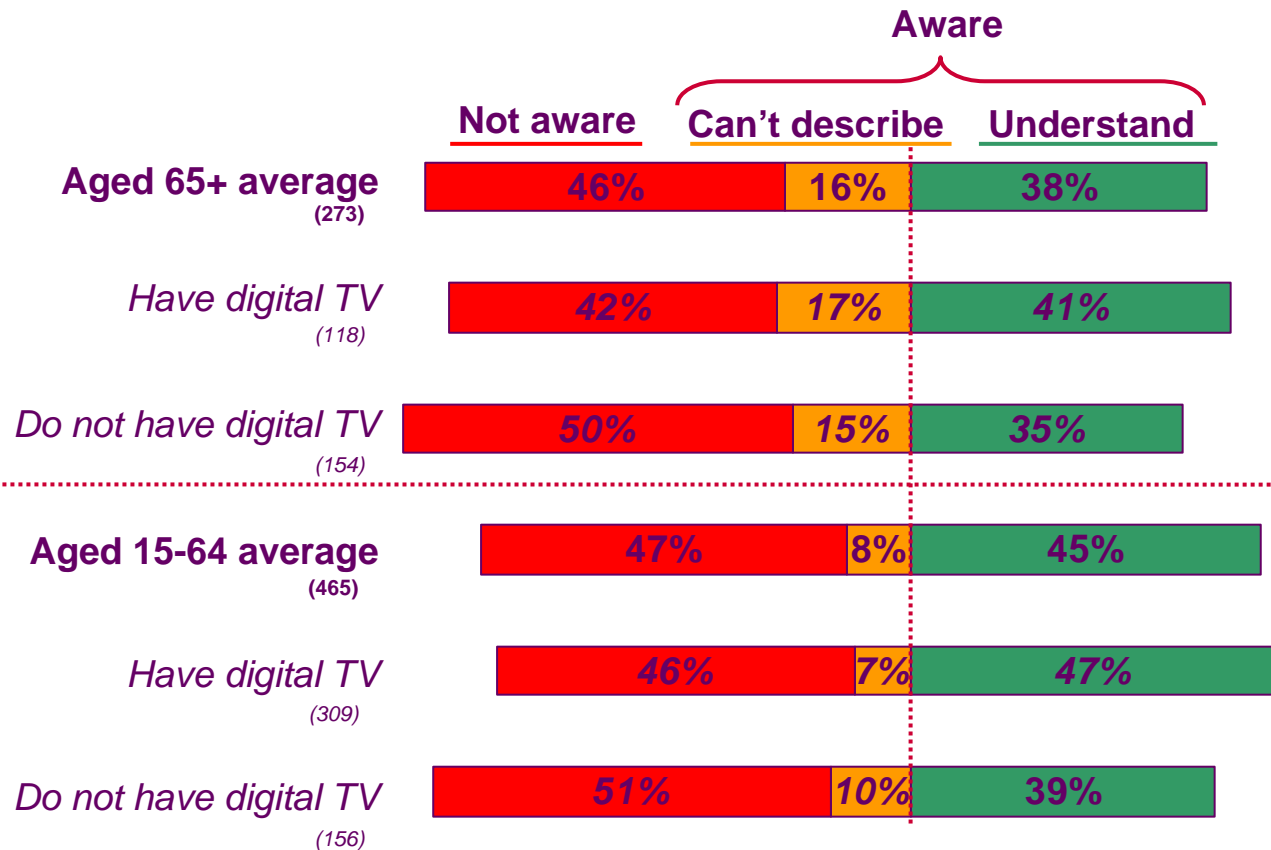
- Two in five people with a disability have heard the term digital switchover and are able to describe what the term refers to ('Understand'); as with the UK average
- Amongst people with a disability, as with the UK overall, a higher proportion of those with digital TV are aware of digital switchover compared to those without but there are no significant differences in understanding compared to the UK



↓ ↑ Indicates significantly lower or higher than 2005 UK average

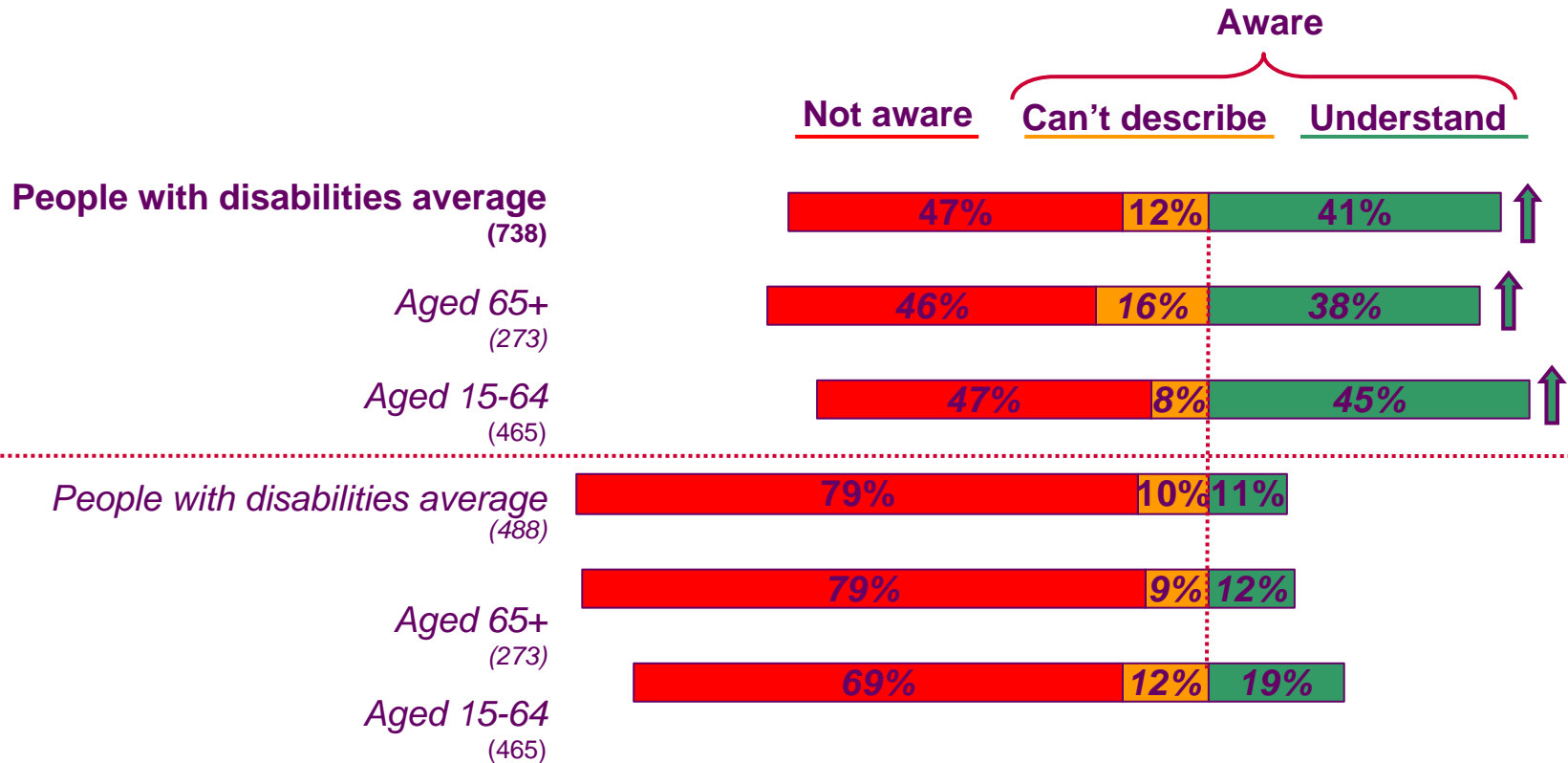
- Awareness and understanding of the term digital switchover is higher amongst younger people with a disability

DSO



↓ ↑ Indicates significantly lower or higher than 2005 people with disabilities

- Understanding of the term digital switchover has increased significantly amongst people with a disability compared to 2004; rising by 30% to account for 41% of all people with a disability
- Understanding is lower amongst people with a disability in aged 65 and over, low income households and females



↓ ↑ Indicates significantly lower or higher than 2004 people with disabilities