



CONSUMER
PANEL

Ofcom Consumer Panel: Consumers and the communications market report

Focus on consumers under 65 with a disability

May 2007

Report outline

- This report looks at how consumers with a disability under 65 compare with consumers in the **UK overall**
- Figures are also shown for three other key 'vulnerable' groups of interest to the Consumer Panel: consumers living in rural areas, consumers aged 65 and over and consumers on low incomes aged under 65
- There is a degree of overlap between the different 'vulnerable' groups of interest to the Consumer Panel. In particular, the majority of older people aged 65 or over are either in low income households or are people with a disability. This means that findings which appear to relate to those with a disability and/or those in low income households may actually relate to older people within these groups rather than the groups as a whole. We have therefore looked at consumers with a disability who are aged under 65 and those in low income households who are aged under 65
- The definition of 'those with a disability' used is those consumers who say that they have any long-term illness, health problem or disability which limits their daily activities or the work they can do
- Throughout this report, we only comment on differences between groups which are statistically significant
- Unweighted base sizes are shown throughout the report to illustrate the number of respondents interviewed. Question wording can be found in the notes pages

Profile of groups of interest by nation

*Numbers in **bold purple** are significantly different to the All UK average*

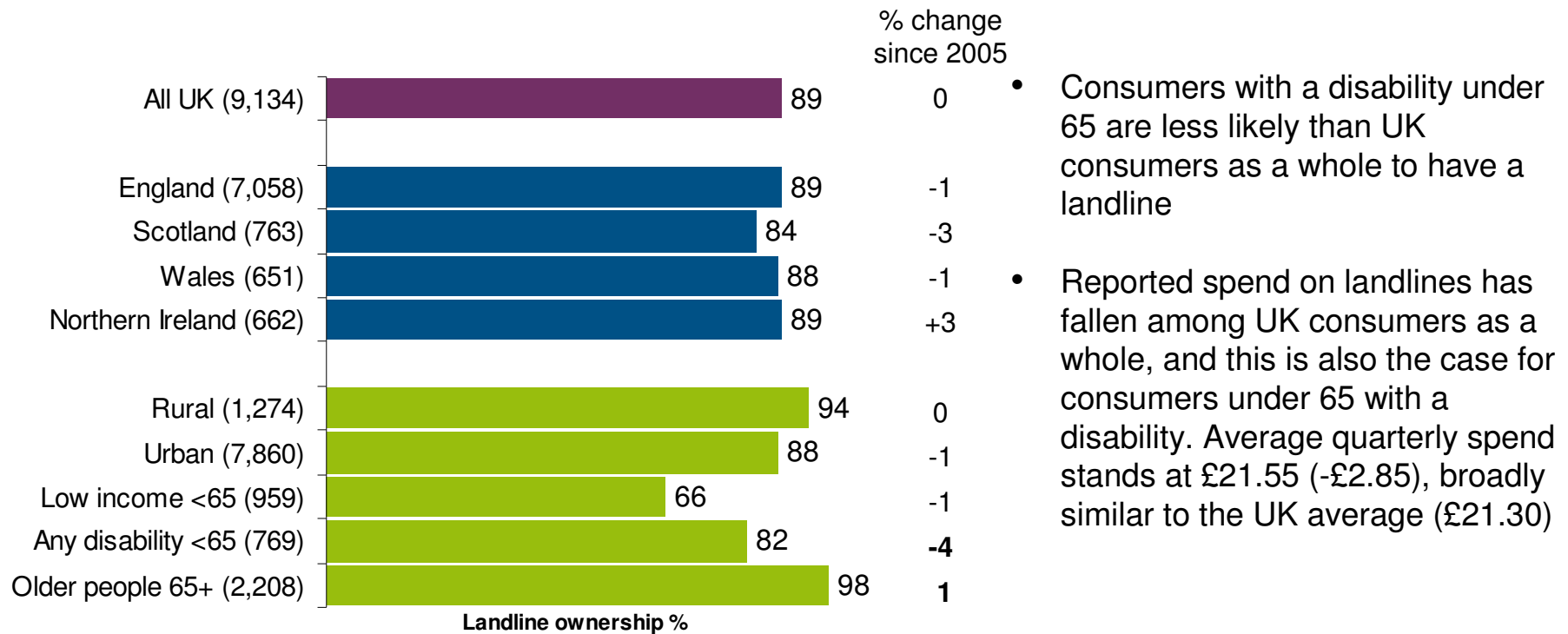
	All UK % (9,134)	England % (7,058)	Scotland % (763)	Wales % (651)	Northern Ireland % (662)
Older people (aged 65+)	19	20	16	22	17
Rural	14	12	22	23	29
Disability <65	8	7	10	11	10
Low income <65	10	10	14	13	10
TOTAL NATION SPLIT	100	84	9	5	3

Consumers under 65 with a disability have higher levels of ownership than other groups, but more likely to have difficulties using technology

- Less likely to have a landline or internet access at home
- More likely to live in a mobile only household, and this figure has increased since last year
- More likely to have visual, hearing or mobility difficulties using TVs, PCs, landline or mobile phones. TVs cause biggest difficulties, with main problems relating to hearing

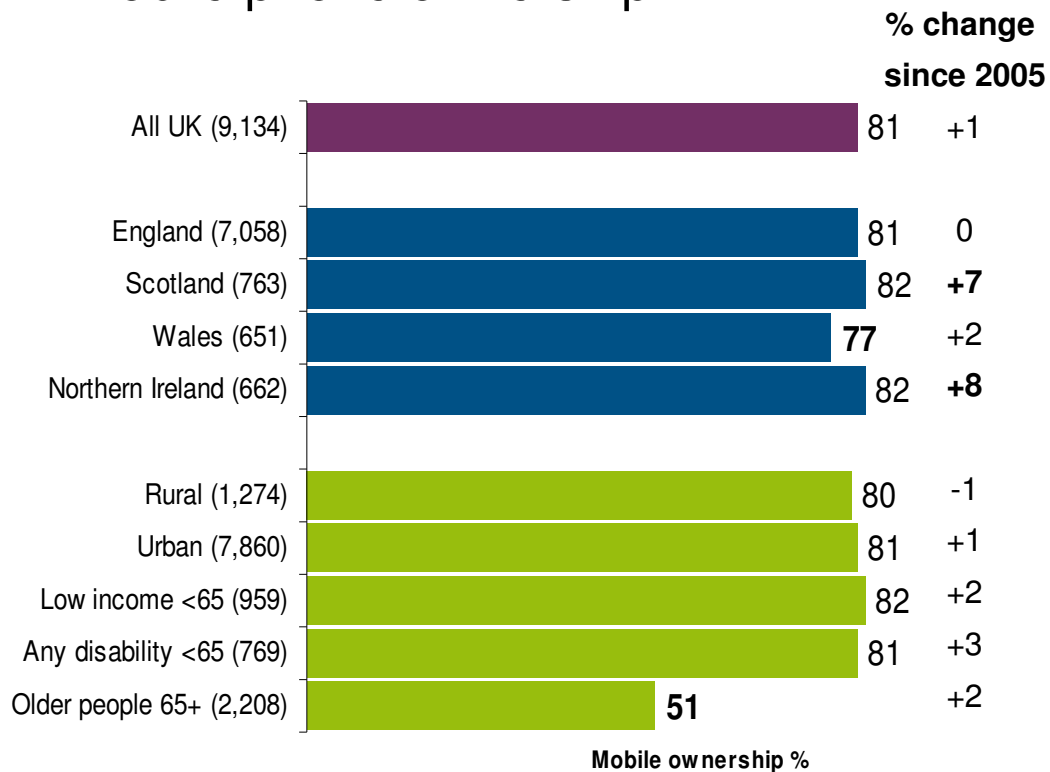
Landline ownership has fallen among consumers with a disability under 65

Landline ownership



Mobile phone ownership is stable among consumers with a disability under 65

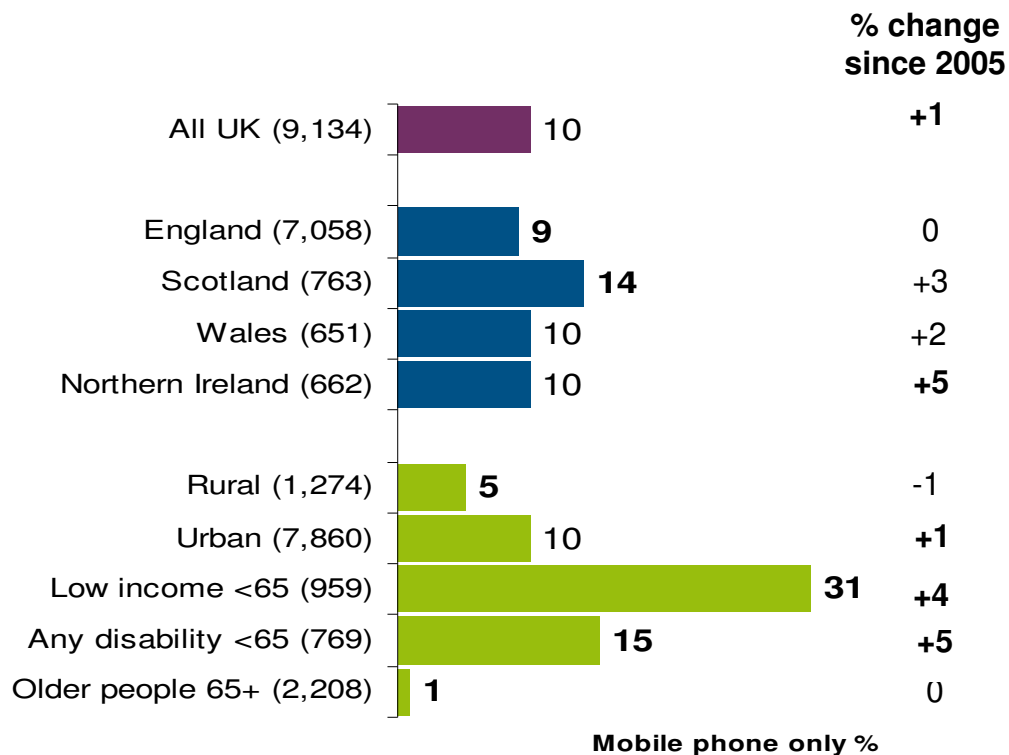
Mobile phone ownership



- More than three in four (76%) of those with a disability under 65 who use a mobile phone are on a pay as you go plan, significantly higher than the UK average (64%)
- Reported monthly spend on mobiles by this group has fallen slightly since 2005 to £19.40 (-£0.45), whilst the average UK reported spend has risen. Those with a disability under 65 on average now spend £2.80 less a month compared to the UK average

The proportion of those under 65 with a disability living in a mobile only household is increasing

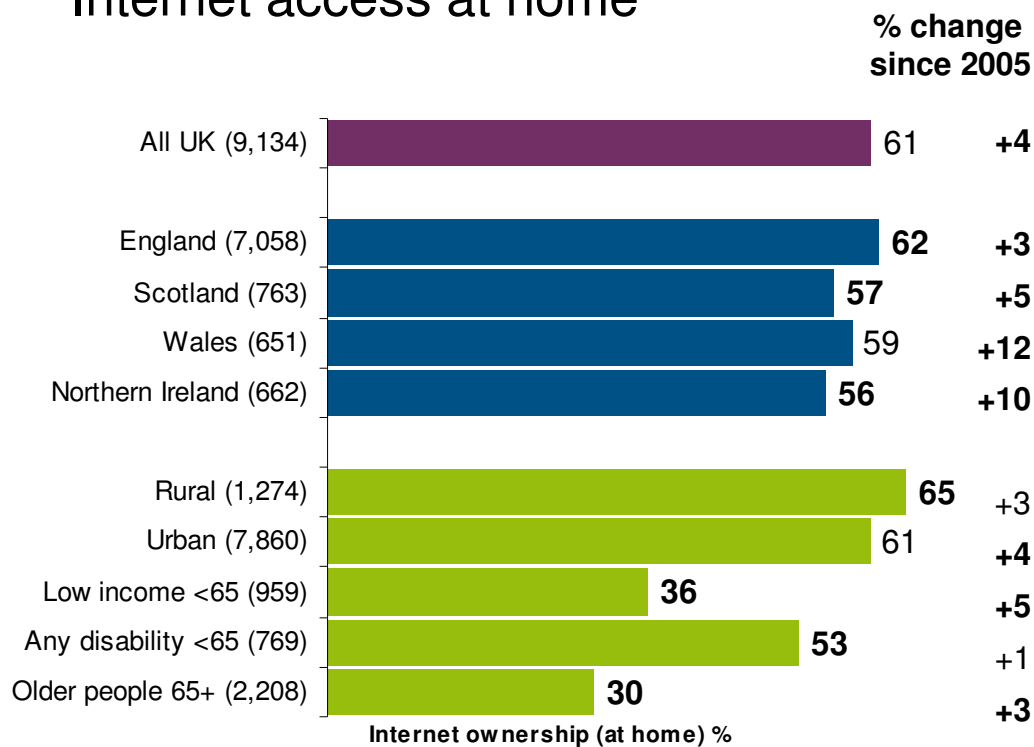
Mobile only ownership



- Consumers under 65 with a disability are more likely to live in mobile only households compared to UK consumers as a whole. The proportion doing so has risen significantly since 2005 (up five percentage points)
- There is a strong relationship between age and mobile-only ownership, with this being particularly prevalent among the 15-24 age group (22%)

The gap between those with a disability under 65 and UK consumers overall in respect to home internet access is widening

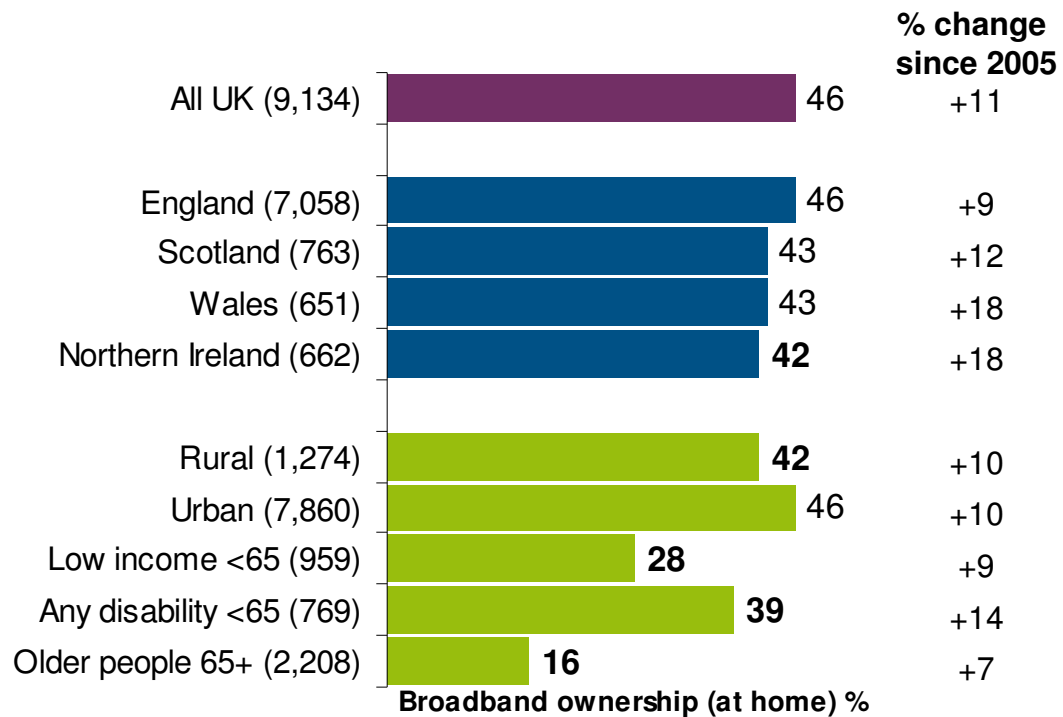
Internet access at home



- While the proportion of those with internet access at home has increased among UK consumers by four percentage points, it is stable among consumers under 65 with a disability
- Reported monthly spend on the internet has increased by £2.55 to £20.40, which is higher than the UK average of £18.35
- Among consumers with a disability not planning to get internet access in the next 12 months, this group are more likely than average to mention cost (56% vs 31% overall) and less likely to say they have no need for the internet (49% vs 63% overall)

Broadband ownership has increased, but still a gap with the rest of the UK

Broadband ownership



- Broadband penetration has increased by 14 percentage points – a higher rise than among UK consumers as a whole – but consumers with a disability under 65 still lag behind the rest of the population

Those aged under 65 and with a disability are less likely to use the internet for purchasing goods, finding information for work and banking

Use of internet by 'vulnerable' groups - 2006

<i>Base: All with internet at home</i>	All UK % (2,490)	Rural % (334)	Urban % (2,156)	Low Income under 65 % (144)	With disability under 65 % (194)	Older people aged 65+ % (295)	Broad band % (1,775)	Narrow band % (596)
Sending/receiving email	85	88	84	72	82	77	87	81
Surfing/browsing	72	71	72	59	73	50	76	61
Purchasing goods/services	63	68	62	41	55	47	68	52
Finding/downloading info for personal use	60	62	59	46	60	55	63	55
Banking	49	50	49	24	41	31	54	36
Downloading music/movies	40	31	42	32	44	9	47	21
Finding/downloading info for work	42	44	42	18	35	13	46	31

NB Figures in bold purple indicate results for 'vulnerable' groups that are significantly higher or lower than the figure for all UK consumers

Consumers under 65 with a disability are more likely to have ever switched landline and multichannel TV supplier compared to UK consumers

Switching by 'vulnerable' groups - 2006

<i>Base: All with landline/use mobile/have internet at home</i>	Landline % (4,295)	Mobile phone % (3,203)	Internet % (3,790)	Multichannel TV % (3,599)
All UK	35	38	26	16
Rural	30	34	26	12
Urban	36	38	26	17
Low income aged under 65	31	32	21	19
With disability aged under 65	46	43	28	26
Older people aged 65+	29	16	19	12

NB Figures in bold purple indicate results for 'vulnerable' groups that are significantly higher or lower than the figure for all UK consumers

Consumers with a disability are just as likely as the average UK consumer to think it was or would be easy to switch supplier

Proportion agreeing it was or would be easy to switch - 2006

<i>Base: All with landline/digital TV/use mobile /have internet at home</i>	Landline % (3,669)	Mobile phone % (3,203)	Internet % (2,490)	Digital TV % (3,599)
All UK	75	82	70	71
Rural	69	75	66	59
Urban	77	84	71	73
Low income aged under 65	80	87	69	73
With disability aged under 65	77	83	66	70
Older people aged 65+	61	60	59	61

NB Figures in bold purple indicate results for 'vulnerable' groups that are significantly higher or lower than the figure for all UK consumers

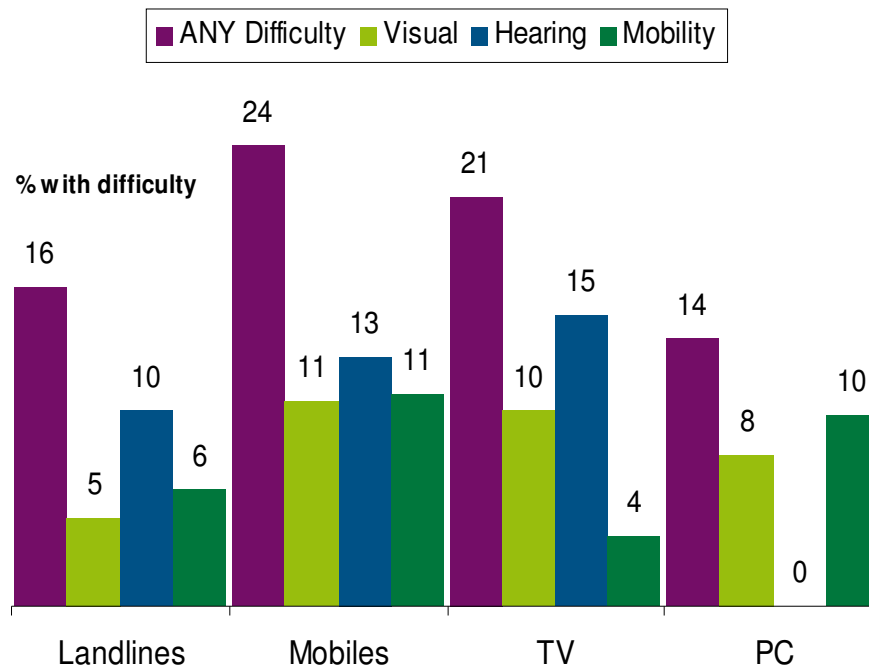
Consumers under 65 with a disability are significantly more likely to turn to family and less likely to turn to friends as a trusted source of information on suppliers

	Trusted sources of information for consumers - Mobiles		Trusted sources of information for consumers - Internet		Trusted sources of information for consumers - TV		Trusted sources of information for consumers - Landline	
	UK TOTAL % (1,505)	With disability under 65 % (138)	UK TOTAL % (1,505)	With disability under 65 % (138)	UK TOTAL % (1,505)	With disability under 65 % (138)	UK TOTAL % (1,505)	With Disability under 65 % (138)
Family members	27	38	29	32	28	37	26	33
Friends	20	11	22	18	20	16	19	18
Internet in general	19	18	21	14	19	10	20	10
Visit shop/store selling technology/device	17	15	7	7	12	11	6	7
Supplier already using	12	15	7	8	10	12	15	15
Magazines/newspapers	6	7	6	8	6	7	6	6
Would not look for information/advice	5	5	9	9	5	5	8	9

NB Figures in bold purple indicate results that are significantly higher or lower than the figure for all UK consumers

Around one in five consumers under 65 with a disability have or say they would be likely to have difficulties with mobiles, TVs and landlines

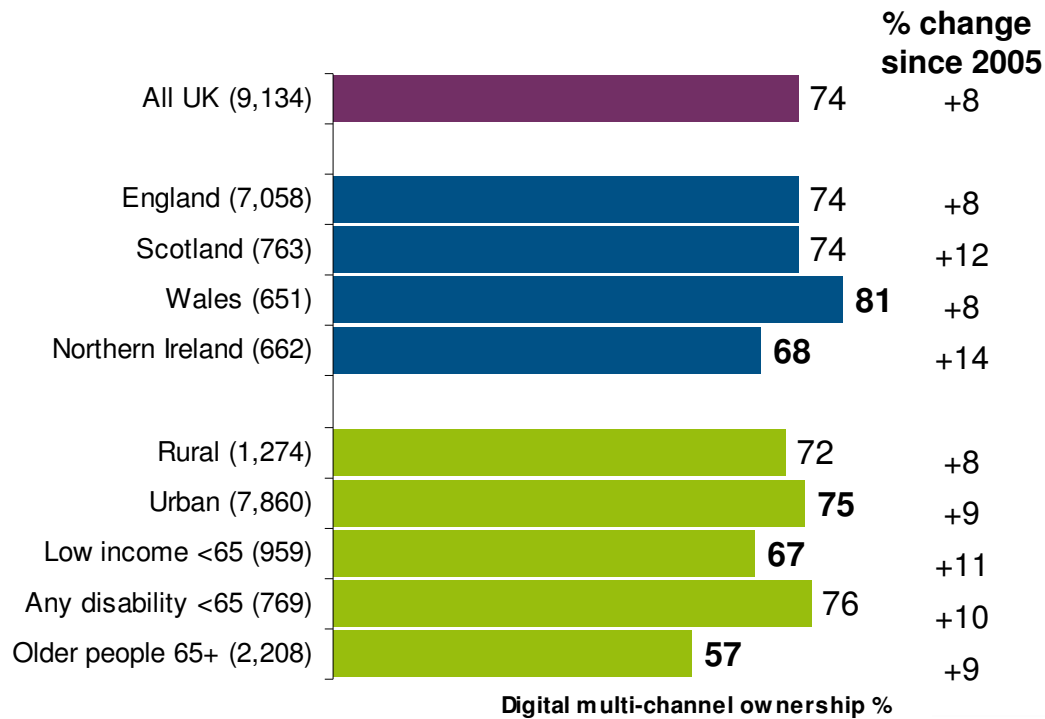
Difficulties in using technology among all under 65 with a disability



- As would be expected significant differences occur between this group and all UK consumers. The average user is roughly half as likely to suffer any difficulties:
 - 8% for landlines (6% hearing)
 - 12% for mobiles (6% hearing)
 - 10% for TVs (7% hearing)
 - 6% for PCs (5% mobility)

Ownership of digital TV has increased, and remains in line with the UK average

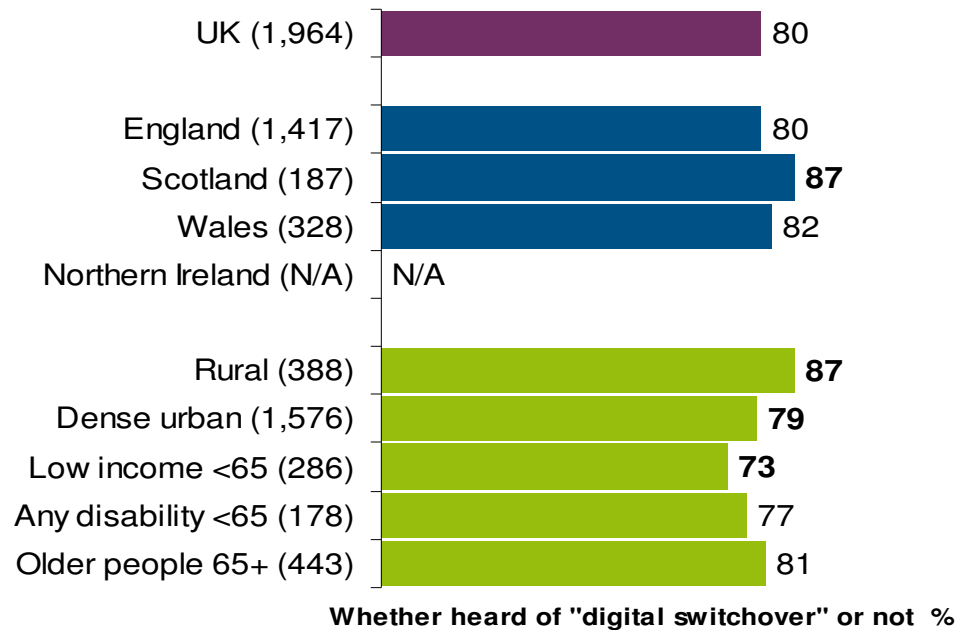
Ownership of digital TV



- Reported monthly spend on multichannel TV (£30.35) is significantly lower than the UK average (£36.90)

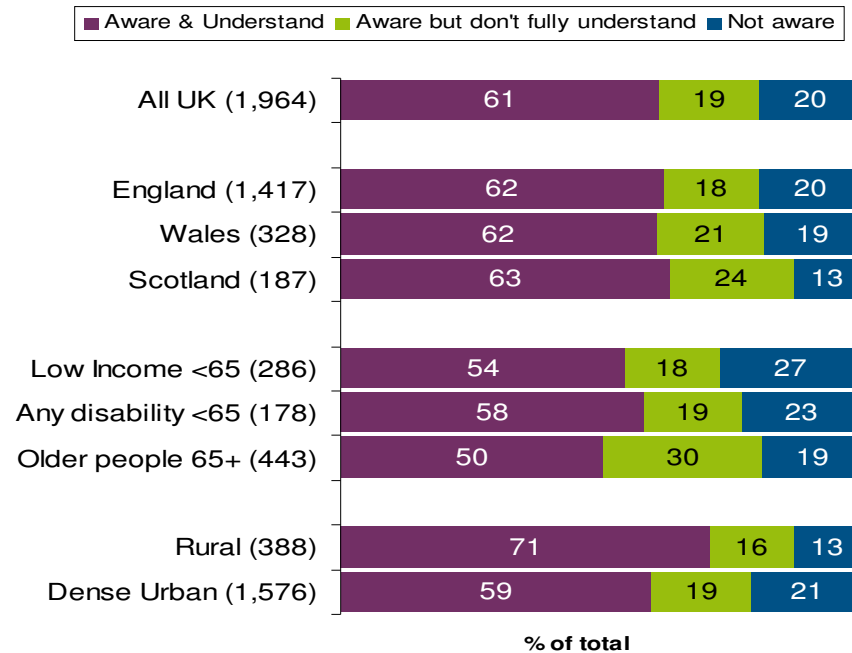
Consumers under 65 with a disability have same levels of awareness of the digital switchover as other consumers

Awareness of digital TV switchover



Awareness and understanding of digital switchover is marginally lower amongst consumers under 65 with a disability

Understanding of digital switchover



- Consumers under 65 and with a disability are slightly less likely to be aware or to understand what the switchover means in comparison to the average UK consumer
- Those aged under 65 and with a disability are more likely to feel that the switchover is unfair than the UK average (34% vs 26% overall) and less likely to think that it is good for the UK (13% vs 20% overall)

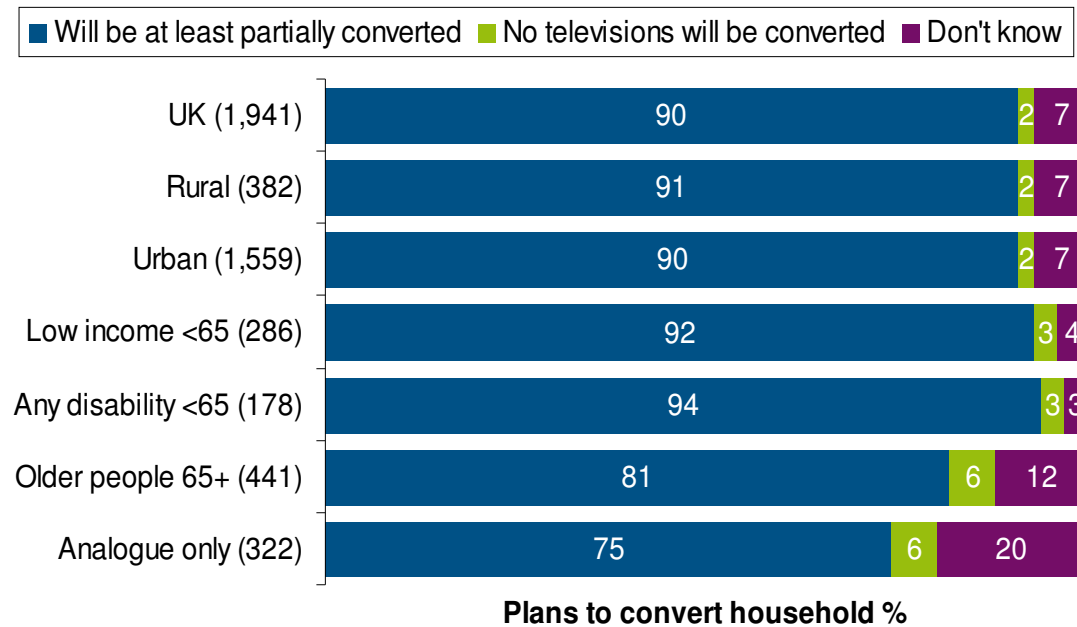
Consumers with a disability under 65 differ from UK consumers overall as to the main reason for the switchover to digital

	All % (2,490)	Eng land % (1,147)	Scot land % (187)	Wales % (328)	Rural % (388)	Urban % (1,576)	Low Income <65 % (286)	Any Disability <65 % (178)	Older people aged 65+ % (295)
Base:									
Update broad- casting network	34	34	35	28	34	34	26	21	26
Govt. can make money	23	23	19	27	22	23	24	30	22
Give viewers more choice	12	12	17	8	9	13	20	16	8
Retailers can make money	9	9	7	16	12	8	12	14	13
Will free up airwaves	9	9	4	4	8	9	4	9	5
Don't know	10	8	15	11	9	10	11	7	19

- Those with a disability aged under 65 are more likely to think that the principal reason for digital switchover is a way for the government and retailers to make money and less likely to think it is to free up the airwaves and update the network. They are however slightly more likely to think that it will provide viewers with more choice.

Consumers under 65 with a disability are more likely to know whether they will convert their TVs

Plans to convert TVs



- Consumers with any disability aged under 65 are more likely to say they will update their TV(s) with cable than UK consumers overall (11% vs 4%) and less likely to say Freeview (44% vs 34%)