Disabled consumers’ use of communications services

A Consumer Experience report

Research Document

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Section 1

Introduction and methodology

1.1 Background

According to the *Family Resources Survey 2013/14*, published in June 2015, almost 12 million (11.9 million) consumers in the UK, by 2013/14, had a limiting long-term illness, impairment or disability.\(^1\) This figure has increased from 10.5 million in 2003/04, although the estimated percentage of the population has remained relatively constant over time (at around 19%) as a result of the increasing overall population. Under the Communications Act 2003, Ofcom has a specific duty to have regard to the needs of persons with disabilities. In order to meet these responsibilities and to respond to stakeholder requests for better information on the experiences of disabled consumers, we worked with the British Population Survey (BPS) to produce this report.\(^2\) It provides Ofcom’s most robust analysis yet of disabled consumers’ household access to, personal use of, and limitations in use of, communications services across Great Britain.

By working with the BPS we achieved a robust sample of disabled consumers (4,004 consumers aged 15 or over). This has meant that, for the second time, we have been able to publish quantitative analysis comparing household ownership/access to and use of communications services among consumers with different types of impairment or disability. The 2012 findings were published in September 2013.\(^3\) As in 2012, the 2014 top-line findings were published in Ofcom’s annual *Consumer Experience* report.\(^4\)

This 2015 report provides a detailed analysis among consumers with hearing, visual, mobility or multiple impairments or learning disabilities, making comparisons by type of disability and by demographic group. It draws out differences between disability groups and makes comparisons with non-disabled consumers. Where possible, comparisons have been made with the 2012 data.

Previously, this type of analysis has been limited by the fact that observed differences between groups of disabled consumers can be explained by the substantial demographic differences between the groups. The analysis in this report is unique in that it compares age and social groups on a like-for-like basis. The findings suggest that demographic differences offer only a partial explanation for the differing levels of communications service take-up. Other factors, including the disability itself, are affecting access and use of key communications services, or compounding the effects of age and socio-economic group among consumers with disabilities.

The findings from this report will help inform all areas of Ofcom’s work relating to the needs of disabled consumers. It complements our existing research, which looks more broadly at service affordability and media literacy in the UK population. The results will allow us more accurately to identify and prioritise potential areas of concern for Ofcom and/or other stakeholders.

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2 British Population Survey: [http://www.thebps.co.uk](http://www.thebps.co.uk)
1.2 The scope

This report compares the profiles of consumers with different types of disability: their households’ access to, their use of, and their limitations in using communications services, i.e. landline, mobile, PC/laptop, tablet, games console, TV, DAB (digital audio broadcasting) and internet access.

In summary, the report covers the following areas:

Profile of disability groups: an overview of the demographic profiles of the disability groups - including age, socio-economic group, working status, household size, and severity of impairment where sample sizes allow.

Access overview: an overview of the communication devices and services that disabled consumers have access to in their homes, the frequency with which they personally access the internet, and the activities they undertake when accessing the internet.

Personal use overview: an overview comparing levels of access to levels of personal use of devices and services, among disabled consumers and by disability, highlighting where gaps exist between the two.

Stated limitations in use overview: an overview of the proportion of disabled consumers who said their disability limited or prevented their use of communication devices and services, and the proportion who did not use a device or service as its use was prevented.

Consumers with mobility impairments: a detailed analysis of the services and devices that consumers with mobility impairments (only) have access to in the home, their use of them, and any limitations felt on using them, plus more information on the impact of demographics. Types of mobility impairment are broken down further in this section into wheelchair users, those with other lower body impairments, upper body impairments, and those with both upper and lower body impairments.

Consumers with hearing impairments: a detailed analysis of the services and devices that consumers with hearing impairments (only) have access to in the home, their use of them, and any limitations felt on using them, plus more information on the impact of demographics. Deaf consumers are compared to those with partial hearing in this section.

Consumers with visual impairments: a detailed analysis of the services and devices that consumers with visual impairments (only) have access to in the home, their use of them, and any limitations felt on using them, plus more information on the impact of demographics. Blind consumers have not been split out from partially-sighted consumers in this section, due to the low incidence of this group of consumers and the associated small sample sizes achieved.

Consumers with multiple impairments: a detailed analysis of the services and devices that consumers with multiple impairments have access to in the home, their use of them, and any limitations felt on using them, plus more information on the impact of demographics. By ‘multiple impairments’ we mean any combination of mobility, hearing and visual impairment. Types of multiple impairments are broken down in this section to those with at least two or more of these impairments.

Consumers with learning disabilities: a detailed analysis of the services and devices that consumers with learning disabilities (only) have access to in the home, their use of them, and any limitations felt on using them, plus more information on the impact of demographics.
The analysis provided in this section is limited due to the small sample sizes achieved for this disability group.

This report uses unweighted data and examines disabled consumers with each type of disability, as well as consumers with multiple disabilities. We make comparisons with the total disabled sample (which includes consumers with other non-specified disabilities) and the total non-disabled sample. We decided to isolate consumers with single (‘solus’) impairments from those with multiple impairments in order to understand the impact of the specific disability type on access to and use of communications services.

Note: Where the report refers to mobility, hearing or visual impairment, this is always a solus impairment rather than part of a wider condition with other impairments.

1.3 Methodology

The BPS is a face-to-face nationally representative survey which interviews between 6,000 and 8,000 adults aged 15+ across Great Britain each month.

Ofcom commissioned a question on the BPS survey between August and November 2014, asking respondents whether they considered themselves to have a disability or long-term illness that affected their day-to-day lives and, if so, what type of disability they had: mobility impairment (wheelchair user, unable to walk far or limited reach); visual impairment; hearing impairment; multiple impairments; a learning disability; or other.

The survey includes questions on access to the following communications services and devices in the home: landline and mobile telephony (including smartphone); PC/laptop and tablet; internet (anywhere, including mobile access); games console; DAB radio; pay TV (satellite/cable); and free-to-air TV (Freeview/Freesat). In addition, the following supplementary questions were asked of those with internet access: length of time with internet access; frequency of internet use; types of uses. As an extension to the 2012 data, consumers were also asked in 2014 about their personal use of each device and service, and the levels of limitations felt in using those devices due to their disability. A full list of questions is contained in Annex 1.

1.4 Sample

A total sample of 4,004 disabled consumers (self-defined) was achieved, and a total sample of 15,859 non-disabled consumers. The total proportion of disabled consumers equated to 20% of the sample of GB adults aged 15 and over.

Of those consumers under 65 years of age, 15% classified themselves as disabled, compared to 38% of those aged 65 and over, and 49% of those aged 75 and over.

Of those who self-reported a disability, 21% of the sample had a mobility impairment only; 11% had a hearing impairment only; 8% had a visual impairment only and 28% had some other disability as their only disabling condition. The sample included consumers who had multiple impairments; 17% had a combination of mobility, visual and/or hearing disabilities and 34% of the sample had multiple impairments including ‘other impairments’ (these are not included in the analysis). Consumers with a learning disability represented the smallest disability group, with 5% self-reporting this condition. Please note that this report focuses on the discrete groups of consumers with solus mobility, hearing or visual impairments,

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5 Unweighted data has had no weighting, normalisation or other adjustments applied. It represents all respondent demographics in the exact proportions they were interviewed in.
consumers with a combination of these impairments, and on those with a solus learning disability.

The overall incidence figures show a similar pattern to the Family Resources Survey 2013/14 which found that the estimated percentage of the UK population who were disabled was around 19% (i.e. 11.9 million people), and that the most commonly reported impairments were those that affect mobility.6

1.5 Statistical reliability

For reporting purposes, sub-group differences are noted in the report only when they are statistically significantly different from the total sample or subgroups within the sample. We have reported differences at the 95% confidence interval; this means that if you asked 100 consumers in the population, 95 of them would give a similar response to the finding reported.

Low sample sizes (i.e. between 50 and 100 respondents) were achieved for some demographic groups for some metrics. Where this is the case, we have highlighted that the data should be treated as indicative only, as they are subject to high margins of error.

Insufficient sample sizes (i.e. fewer than 50 respondents) have not been reported.

Where we note the percentage point differences between samples, these are referred to as ‘Xpp' throughout.

1.6 Caveat

The analysis focuses on consumers with hearing, visual, mobility or learning disabilities only, and consumers with a combination of any of the first three. Disabilities other than those included in the analysis are contained within the total disabled population and are reported only at that level.

When reference is made within the report to ‘all disabled consumers’ or ‘the average disabled consumer’, this includes all disabled consumers within the sample (4,004 respondents), not just the total of the disability groups that we have focused on.

Section 2

Executive summary

This report contains a range of detail on disabled consumers’ access to and use of communications services and devices.

The analysis suggests that demographic differences offer only a partial explanation for differing levels of communication device and service take-up. Other factors, perhaps related to the disability itself, may affect ownership and use of key communication services such as the internet by consumers with disabilities, or may compound the effects of the demographic differences.

The degree to which other factors affect ownership among disabled consumers varies by service and by type of disability.

The following is a summary of the key trends and highlights from the report.

2.1 Profile of disability groups (page 16)

- **Consumers with mobility or multiple impairments had the oldest profiles.** The research highlights the strong correlation between disability and age. Around a quarter (23%) of disabled consumers were aged 75+, compared to 6% of non-disabled consumers. Those with multiple impairments reported the oldest age profile with 41% aged 75+. Those with mobility impairments had the second-oldest age profile with a third (32%) in this age group. Conversely, consumers with a learning disability had the youngest profile - almost half (45%) were aged 15-34.

- **Consumers of working age with multiple or mobility impairments were the least likely to be in employment, and the most likely to be retired.** Among consumers under 65, 21% of multiple-impaired and 40% of mobility-impaired respondents were employed, compared to 66% of non-disabled respondents. Around a fifth (19%) of consumers aged under 65 in each of these disability groups were in retirement, and multiple impaired consumers were the group most likely to say they were not working due to their disability/long-term illness (35%).

- **Consumers with a hearing impairment had the most similar socio-demographic profile to non-disabled consumers.** Disabled consumers were more likely than non-disabled consumers to live in DE households (37% vs. 25%), and people with learning disabilities reported the highest proportion living in these households (45%). Disabled consumers with hearing impairments were the least likely (28%) to live in DE households and reported a socio-demographic profile broadly similar to non-disabled consumers.

- **Disabled consumers were more likely than non-disabled consumers to live alone, particularly those with mobility or multiple impairments.** Over a third (36%) of disabled consumers said they lived alone, compared with 16% of non-disabled consumers. Consumers with either a mobility impairment or multiple impairments were the most likely to live in single-person households (40% and 46% respectively), which may reflect the older age profile of these disability groups.
2.2 Access to services and devices: overview (page 24)

2.2.1 Overview

- **Access to communication devices and services in the home was generally lower among consumers with a disability than among those without.** Two exceptions to this were landline telephony and free-to-air TV in the home. Take-up of each of these services among disabled consumers was higher than among non-disabled consumers, despite decreases since 2012 in both groups for each service. The largest gap in access to devices and services in 2014 between disabled and non-disabled consumers was for internet access (65% and 88% respectively).

- **There were significant increases in access to connected devices among disabled consumers since 2012.** Access to web-enabled/‘connected’ devices increased among both disabled and non-disabled consumers. Access to smartphones in the home increased by 18pp (to 66%) for non-disabled consumers in 2014, and by 14pp (to 41%) among disabled consumers. Access to a tablet computer in the home tripled for disabled consumers (up 21pp to 30%), although non-disabled consumers saw a greater increase of 25pp (to 42%).

- **There were indications that factors other than age and socio-economic group limited access to communication devices and services, particularly among older disabled consumers.** Demographic differences explain many of the differences in access levels between disabled and non-disabled consumers. But variations were still evident when comparing common demographic groups, suggesting that factors other than age and socio-economic group limit access, or at least compound the effects of these demographics. The largest gap related to internet access among older ABC1s, which stood at 76% among non-disabled consumers and 51% among consumers with a disability in this same demographic.

- **Household size was an additional factor in access to communications services and devices among disabled consumers.** Those living in larger households benefited from access to devices and services owned by others within the home. Those living alone or in smaller households were significantly less likely to have access to these devices/services.

2.2.2 Internet access and connected devices

- **Internet access among disabled consumers was significantly lower than for non-disabled consumers.** Despite increases in access for each disability group since 2012 (with the exception of hearing-impaired consumers, where levels were unchanged), access remained lower among disabled consumers (65% overall) than among non-disabled consumers (88%). Consumers with multiple impairments had the lowest levels of access at 49%, while visually-impaired consumers and those with a learning disability had the highest levels of access among the disability groups (at 75% and 73% respectively).

- **Factors other than age and socio-economic group affected levels of internet access for people with mobility or multiple impairments.** Younger (under 65) disabled consumers in socio-economic group ABC1 tended to report comparable levels of internet access as non-disabled consumers in the same demographic group, with the exception of those with multiple impairments. For these consumers, internet access tended to be lower than for non-disabled consumers within each of the combined age and socio-economic groups. This suggests that other factors limit
access for these groups; perhaps not benefiting from access to devices owned by other household members (given the increased likelihood that they live alone), or their disability - perhaps visual impairment or a limited ability to reach.  

- The proportion of disabled consumers with access to a tablet in the home tripled between 2012 and 2014, but remained lower than among non-disabled consumers. Both groups saw a significant increase in access since 2012: non-disabled consumers up by 25pp (to 42%), and disabled consumers up by 21pp (to 30%), with increases evident across each disability group. Consumers with a learning disability were the only group with access levels comparable to non-disabled consumers.

- As with tablets, access to a smartphone in the home had increased significantly for both disabled and non-disabled consumers since 2012. Despite increases among each disability group, disabled consumers overall continued to have lower levels of access to these devices than did non-disabled consumers (41% vs. 66%). Reflecting their younger profile, consumers with a learning disability were the most likely to have access to a smartphone (57%), albeit still significantly lower than that of non-disabled consumers.

- Consistent with the rise in access to mobile devices, the proportion of disabled consumers accessing the internet in this way had increased since 2012. The majority of internet users – with or without a disability - said they accessed the internet at home. Accessing the internet via a mobile device had increased significantly since 2012 for both disabled and non-disabled consumers, influenced by the increases in access to connected devices such as smartphones and tablets.

- Communication and information remained the most popular uses of the internet for both disabled and non-disabled consumers, although neither activity had changed since 2012 for either group. Gaming and audio-visual content were the least popular choices for both, although a higher proportion of both groups were using the internet for these activities than in 2012. Consumers with a learning disability were significantly more likely than non-disabled consumers to use the internet for gaming, perhaps a reflection of their younger age profile; this was the only activity with higher usage levels than among non-disabled consumers.

2.2.3 Telecoms access (landline and any type of mobile phone)

- Levels of access to a landline in the home were higher among disabled consumers than among non-disabled, driven by their older age profile. Almost eight in ten (77%) disabled consumers had a landline in the home, compared to seven in ten (72%) non-disabled consumers. Landline access among both groups had declined since 2012. Access was more prevalent among disabled consumers aged 65+, with both mobility and multiple impaired consumers in C2DE (87% and 92% respectively) being more likely to have access than their non-disabled counterparts (80%). Overall, visually-impaired consumers and those with a learning disability both had comparable levels of access to a landline (75% and 66% respectively) as non-disabled consumers.

- Despite a rise in any type of mobile phone (simple or smartphone) access within the household, disabled consumers remained less likely than non-disabled consumers to have access. The proportion of disabled consumers with

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7 60% of consumers with multiple disabilities said they had poor/partial sight, and 23% said they had limited ability to reach
access to any type of mobile phone rose by 4pp to 85%. This compares to a 2pp increase among non-disabled consumers, and access levels of 89%. Disabled consumers’ increased access was driven by an increase among consumers with multiple impairments.

2.2.4 Broadcast access (TV and radio)

- Disabled consumers were more likely than non-disabled consumers to have access to a free-to-air TV service, and less likely to have pay TV in their homes. Access to a free-to-air TV service (Freeview/Freesat) had decreased since 2012 for both groups, although disabled consumers continued to have higher levels of access (60%) than non-disabled consumers (50%). In contrast, disabled consumers were less likely than non-disabled consumers to have access to pay TV (satellite/cable) (48% vs. 55%), with neither group seeing a change in access levels since 2012.

- A quarter of both disabled and non-disabled consumers had access to a DAB radio in the home. Access for non-disabled consumers remained unchanged since 2012 (26%), but for disabled consumers had increased by 4pp (to 25%), bringing them into line with non-disabled consumers. Increases were evident among both mobility and multiple-impaired consumers.

2.3 Personal use of devices and services: overview (page 44)

- The internet was the only service where levels of personal use across each disability group were comparable with access levels. This suggests that all those with access personally used the internet. In contrast, use of telecoms devices (landline and mobile) and tablets was significantly lower than access levels, across each disability group, highlighting that some disabled consumers, regardless of disability type, had access to these devices/services but did not use them.

- Each disability group had significantly lower levels of use of either a landline or any type of mobile phone, compared to their access levels. In relation to landline use, there were differences of between 9pp and 13pp between access and levels of use. Consumers with a learning disability were the disability group least likely to use a landline. The gap between access to and use of a mobile was between 13pp and 15pp for all except those with a learning disability. This group reported the smallest gap of 10pp between access and use.

- Unlike personal use of the internet, personal use of a tablet was significantly lower for each disability group compared to access level. A proportion of consumers within each disability group said they had access to a tablet in the home, but did not personally use this device. Consumers with mobility or multiple disabilities reported the smallest gap between access and use, at 5pp and 6pp respectively. However, differences of around 9pp-10pp were evident for those with hearing, visual or learning disabilities. The latter group was the most likely to use a tablet (31%), linked to higher access levels (41% of this group had access to a tablet, comparable with access among non-disabled consumers).

- Consumers with hearing or multiple impairments had significantly lower levels of personal use of a DAB radio, compared to access levels to this device. For DAB radios, levels of access and use were closest among consumers with a mobility impairment; 24% had access to this device, comparable to the 21% who said they personally used it. For all other disability groups the gap between access and use was between 6pp-7pp.
2.4  Stated limitations in use of devices and services: overview (page 48)

- A fifth of disabled consumers said their disability limited or prevented their use of any of the communication devices and services. This was highest among visually-impaired consumers (32%) and those with hearing or a learning disability (each at 30%). Mobility- and multiple-impaired consumers (the older profile disability groups within our disabled sample), were less likely to consider their disability a factor which limited or prevented their use of devices and services (22% and 25% respectively).

- Hearing-impaired consumers were the disability group most likely to say their disability limited their use of telecoms services (landline and mobile). Just under one in ten (7%) said they did not use a landline as its use was prevented, in part, by their disability. Use of any type of mobile phone was less affected, with 4% saying they did not use this device due to factors including their disability.

- Consumers with a learning disability were the group most likely not to use a computing device and to say their disability limited/prevented this. One in ten (11%) said they did not use a tablet, and that its use was prevented, in part, by their disability. Uses of PCs/laptops were affected by their disability to a lesser degree, with 5% saying they did not use these devices due to factors including their disability.

- Around one in ten consumers in each disability group said they used a television, but that its use was limited by their disability. In total, between 10%-14% of consumers in each disability group said their disability limited or prevented their use of a television set. A minority (up to 2%) of each disability group said they did not use a TV set due to factors including their disability.

2.5  Consumers with mobility impairments (page 52)

- Six in ten mobility-impaired consumers had internet access (anywhere), compared to nine in ten non-disabled consumers. Internet access had increased by 13pp (to 60%) since 2012 for this disability group, but remained lower than for non-disabled consumers (up 5pp to 88%). The older age profile of this disability group (over half were aged 65+) explains some of the difference in levels of access, as well as the lower levels of access to computing devices among this group.

- Despite increases in access to computing devices among mobility-impaired consumers, access was less likely than for non-disabled consumers. Access to a PC/laptop in the home rose by 7pp (to 59%) since 2012 for this disability group, and by 18pp (to 27%) for a tablet. However, access to both was less likely than for non-disabled consumers in 2014 (79% and 42% respectively). This was in part driven by lower access among the older mobility-impaired consumers and those in DE socio-economic group, reflective of the higher proportion in retirement.

- Mobility-impaired consumers were half as likely as non-disabled consumers to have access to a smartphone. Three in ten (31%) had access to a smartphone in the home, versus 66% of non-disabled consumers, with both groups increasing their access since 2012. A larger proportion had access to any type of mobile phone in the home (80%) – still less likely than non-disabled consumers (89%).

- Mobility-impaired consumers were more likely than non-disabled consumers to have a free-to-air TV service, and less likely to have a pay-TV service. Around
two-fifths (43%) had access to a pay-TV (satellite/cable) service in the home, lower than for non-disabled consumers (55%). In contrast, access to a free-to-air (Freeview/Freesat) TV service was higher for this group (60%) than for non-disabled consumers (50%), with levels decreasing for non-disabled consumers since 2012.

- **A fifth of mobility-impaired consumers said their disability limited their use of communication services and devices.** These consumers were less likely to say that their disability limited their use of computing devices or the internet (5%-7% stating this) compared to their use of other devices (8%-13%). Use of a TV was the most limited by consumers’ mobility disabilities (13%); although most said they used a TV, its use was limited by their disability.

**2.6 Consumers with hearing impairments (page 73)**

- **Access to the internet (anywhere) was unchanged since 2012 for hearing-impaired consumers, and was significantly lower than for non-disabled consumers.** Over two-thirds (69%) of hearing-impaired consumers had access to the internet, at home or elsewhere; lower than the proportion of non-disabled consumers (88%). Access was lower among the younger age group of 15-34s (91% vs. 97%), but comparable among the other age groups.

- **Hearing-impaired consumers were significantly more likely than non-disabled consumers to have access to a landline at home.** Around eight in ten (83%) had access to a landline (comparable to 2012), compared to around seven in ten (72%) non-disabled consumers (a decrease since 2012). These higher levels of access were driven by the older age groups (65+) and noted among most of the socio-economic groups.

- **Access to smartphones and computing devices was significantly lower for hearing-impaired consumers than for non-disabled consumers.** Access levels to smartphones (46%), PCs/laptops (71%) and tablet computers (32%) had each increased for hearing-impaired consumers since 2012, but remained lower than the proportion of non-disabled consumers in 2014 (66%, 79% and 42% respectively).

- **Consumers with hearing impairments were more likely than non-disabled consumers to have a free-to-air TV service, and less likely to have pay TV.** Around half (48%) had access to a pay-TV service in the home, lower than the proportion of non-disabled consumers (55%). In contrast, access to a free-to-air TV service was higher for this group (61%) than for non-disabled consumers (50%), with levels decreasing for non-disabled consumers since 2012.

- **Three in ten hearing-impaired consumers said their disability limited or prevented their use of communication services and devices.** These consumers were less likely to say their disability limited their use of a computing device or the internet (3%-4% stating this) compared to their use of other devices (11%-18%). Use of a landline was the most limited by a consumer’s hearing disability, with 7% saying they did not use a landline as factors including their disability prevented this.

**2.7 Consumers with visual impairments (page 95)**

- **Three-quarters of visually-impaired consumers had access to the internet (anywhere), compared to nine in ten non-disabled consumers.** Both non-
disabled and visually-impaired consumers’ internet access (at home or elsewhere) had increased since 2012, although visually-impaired remained less likely to have access (75% vs. 88%). The older age profile of visually-impaired consumers (33% aged 65+) explains some of the difference in levels of access, as well as the lower levels of access to computing devices (PCs/laptops and tablets) among this disability group, and the stated impact of their disability in limiting use of such devices.

- **Visually-impaired consumers were significantly less likely than non-disabled consumers to have access to any type of mobile phone in the home.** Around eight in ten (83%) had access to a mobile phone (simple or smartphone), compared to nine in ten (89%) non-disabled consumers, with access levels unchanged for this disability group since 2012. Both groups’ levels of smartphone access had increased, although for visually-impaired consumers this remained lower (up 15pp to 48% vs. non-disabled up 18pp to 66%).

- **Access to a pay-TV service in the home was significantly lower for visually-impaired consumers than for non-disabled consumers.** Almost half (48%) the visually-impaired consumers had access to a pay-TV (satellite/cable) service in the home, compared to 55% of non-disabled consumers. This was driven by the lower access among DE consumers with a visual impairment.

- **A third of visually-impaired consumers said their disability limited or prevented their use of communication services and devices.** These consumers were less likely to say that their disability limited their use of a landline (6% stated this) compared to use of other devices (11%-14%). Use of a tablet was most limited by a consumers’ visual disability; 7% said they did not use a tablet as factors including their disability prevented this.

2.8 **Consumers with multiple impairments (page 114)**

- **Half of multiple-impaired consumers had internet access (anywhere), compared to nine in ten non-disabled consumers.** Internet access (anywhere) had increased by 8pp (to 49%) since 2012 for this disability group, but remained lower than for non-disabled consumers (up 5pp to 88%). The older age profile of consumers with multiple impairments (two-thirds were aged 65+) explains some of the difference in levels of access. Additional factors may be the lower levels of access to computing devices, and the impact of disability on the use of such devices.

- **Despite increases in access to some computing devices for multiple-impaired consumers, access remained lower than for non-disabled consumers.** Since 2012, access to a tablet in the home had risen by 18pp (to 23%) and access to a games console by 4pp (to 16%). However, both tablets and games consoles had lower access levels among non-disabled consumers than in 2014 (at 42% and 32% respectively). Access to a PC/laptop did not increase for either group; multiple-impaired consumers continued to have lower access (54%) than non-disabled consumers (79%).

- **Multiple-impaired consumers were less than half as likely to have access to a smartphone as were non-disabled consumers.** Three in ten (29%) multiple-impaired consumers had access to a smartphone in the home, an increase of 12pp since 2012; but still lower than the proportion of non-disabled consumers in 2014 (66%). Access to any type of mobile phone in the home was up by 7pp to 82%, but remained lower than for non-disabled consumers (89%).
Multiple-impaired consumers were significantly more likely to have a free-to-air TV service, and less likely to have a pay-TV service, than non-disabled consumers. Almost five in ten (46%) multiple-impaired consumers had access to a pay-TV (satellite/cable) service in the home, compared to 55% of non-disabled consumers. In contrast, access to a free-to-air (Freeview/Freesat) TV service was higher for this disability group (65%) than for non-disabled consumers (50%), with levels decreasing for non-disabled consumers since 2012.

A quarter of multiple-impaired consumers said their disability limited their use of communication services and devices. These consumers were less likely to say that their disability limited their use of computing devices or the internet (6%-8% stating this) compared to their use of other devices (11%-12%). Use of a tablet was the most limited by consumers' multiple disabilities, with 5% saying they did not use a tablet as factors including their disability prevented this.

2.9 Consumers with a learning disability (page 135)

Seven in ten (73%) consumers with a learning disability had access to the internet (anywhere), compared to nine in ten (88%) non-disabled consumers. The lower level of access to connected devices, such as PCs/laptops and smartphones, explains some of the difference in levels of access to the internet, as well as the stated impact of their disability on their use of the internet and these devices.

Access to a PC/laptop or smartphone was significantly lower for consumers with a learning disability than for non-disabled consumers. Seven in ten (68%) had access to a PC/laptop, compared to eight in ten (79%) non-disabled consumers, and almost six in ten (57%) had access to a smartphone, compared to 66% of non-disabled consumers.

There were similar levels of access to a tablet between consumers with a learning disability and non-disabled consumers. Two-fifths (41%) had access to a tablet, comparable to 42% of non-disabled consumers. Compared to all disabled consumers, those with a learning disability were more likely to personally use a tablet (31% vs. 23%), a reflection of the younger age profile of this disability group.

Consumers with a learning disability were significantly more likely than non-disabled consumers to use the internet for gaming. Almost a third (31%) used the internet for gaming activities, compared to a fifth (21%) of non-disabled consumers. Consumers with a learning disability were also more likely than non-disabled consumers to have access to a games console (40% vs. 32%). Both these factors are a reflection of their younger age profile.

Three in ten consumers with a learning disability said their disability limited their use of communication services and devices. These consumers were less likely to say that their disability limited their use of a landline, a mobile or the TV (9%-11% stating this) compared to their use of other devices (13%-18%). Use of a tablet was the most limited by a consumer's learning disability, with 11% saying they did not use a tablet, as factors including their disability prevented this.
Section 3

Profiles of disability groups

3.1 Introduction

Recent disability statistics from the Office for Disability Issues show that the prevalence of disability increases with age. Sixteen per cent of working-age adults are disabled, compared to 45% of adults at state pension age or above. The statistics also show that a higher proportion of individuals living in families with disabled members ‘live in poverty’; 19% compared to 15%. While there has been an increase in employment rates among disabled consumers (the gap has reduced by 10pp over the 14 years to 2014), disabled consumers remain significantly less likely than non-disabled consumers to be in employment (46% compared to 76% of working-age consumers in 2012).

In this section we look at the demographics, and additional profile data by disability type, obtained from the survey. The total sample of self-reported disabled consumers obtained over this period in the study was 4,004 (compared to 15,859 non-disabled consumers), or 20% of the sample of GB adults aged 15 and over.

3.2 Key trends

- **Consumers with mobility or multiple impairments had the oldest profiles.** The research highlights the strong correlation between disability and age. Around a quarter (23%) of disabled consumers were aged 75+, compared to 6% of non-disabled consumers. Those with multiple impairments reported the oldest age profile with 41% aged 75+. Those with mobility impairments had the second-oldest age profile with a third (32%) in this age group. Conversely, consumers with a learning disability had the youngest profile - almost half (45%) were aged 15-34.

- **Consumers of working age with multiple or mobility impairments were the least likely to be in employment, and the most likely to be retired.** Among consumers under 65, 21% of multiple-impaired and 40% of mobility-impaired respondents were employed, compared to 66% of non-disabled respondents. Around a fifth (19%) of consumers aged under 65 in each of these disability groups were in retirement, and multiple impaired consumers were the group most likely to say they were not working due to their disability/long-term illness (35%).

- **Consumers with a hearing impairment had the most similar socio-demographic profile to non-disabled consumers.** Disabled consumers were more likely than non-disabled consumers to live in DE households (37% vs. 25%), and people with learning disabilities reported the highest proportion living in these households (45%). Disabled consumers with hearing impairments were the least likely (28%) to live in DE households and reported a socio-demographic profile broadly similar to non-disabled consumers.

- **Disabled consumers were more likely than non-disabled consumers to live alone, particularly those with mobility or multiple impairments.** Over a third (36%) of disabled consumers said they lived alone, compared with 16% of non-disabled consumers. Consumers with either a mobility impairment or multiple

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impairments were the most likely to live in single-person households (40% and 46% respectively), which may reflect the older age profile of these disability groups.

### 3.3 Demographic profiles

**Consumers with mobility or multiple impairments had the oldest profiles**

Figure 1 compares the age profile among consumers within the 2014 survey: non-disabled and the disabled population overall, and consumers with each disability type. The disabled population overall had an older age profile, with the age difference most pronounced among those aged 75+. Twenty-three per cent of disabled adults were aged 75+, compared to 6% of non-disabled adults.

There were also marked differences between disability types: consumers with multiple, hearing and mobility impairments had the highest proportions in the 75+ age group (41% of consumers with multiple impairments, 32% with mobility impairment and 27% with a hearing impairment), compared with 6% of non-disabled consumers.

By contrast, those with a visual impairment or learning disability had younger profiles; 17% of visually-impaired consumers and 6% of consumers with a learning disability were aged 75+. The proportion of consumers with a learning disability aged 75+ was comparable to non-disabled consumers (6%). Consumers with a learning disability had the youngest profile overall, with almost half (45%) aged 15-34, significantly higher than the proportion of non-disabled consumers (35%).

There was a change in the age profile of those with multiple impairments since 2012; a smaller proportion of this group now fall into the 75+ age group (41% compared to 49% in 2012). The profile of those with a mobility impairment also shifted slightly, with an increase in consumers aged 15-34 (from 3% to 8%) and a decrease in those aged 55-64 (from 20% to 16%). There was no change in the age profile of any of the other groups shown.

**Figure 1 Age profile of non-disabled and disabled consumers**

Source: British Population Survey, 1 August - 20 November 2014


○○ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

↑↓ = Statistically significant difference at 95% confidence level compared to 2012
Consumers with a learning disability were the most likely to live in socio-economic group DE households

With the exception of households with hearing-impaired consumers (which had a socio-economic profile similar to that of non-disabled households), a greater proportion of households with disabled consumers were DE and a lesser proportion ABC1 (Figure 2). In total, around two-fifths (42%) of disabled consumers were in socio-economic group ABC1 with three-fifths (58%) in group C2DE.

Consumers with a learning disability had the largest proportion within socio-economic group DE - 45% were in this group, compared to a quarter (25%) of non-disabled consumers.

There were slight changes in the socio-economic profile of mobility-impaired consumers since 2012. The proportion of consumers in ABC1 increased by 8pp (to 42%), while the proportion within DE decreased by 5pp (to 38%).

![Figure 2 Socio-economic profiles of non-disabled and disabled consumers](image)

Source: British Population Survey, 1 August - 20 November 2014
○○ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)
↑↓ = Statistically significant difference at 95% confidence level compared to 2012

Disabled consumers were more likely than non-disabled consumers to be aged 65+, irrespective of income

Figure 3 compares the combined socio-economic and age profiles of consumers with specific disabilities with those of non-disabled consumers.

As noted above, two-fifths of disabled consumers were in socio-economic group ABC1 and three-fifths in C2DE. Additional analysis reveals that with the exception of those with a visual impairment, consumers with each disability were at least twice as likely as non-disabled consumers to be aged 65+, irrespective of which socio-economic group they were in.
Figure 3 Combined socio-economic group and age bands of non-disabled and disabled consumers

<table>
<thead>
<tr>
<th></th>
<th>ABC1</th>
<th>C2DE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Under 65</td>
<td>65+</td>
</tr>
<tr>
<td>Non-Disabled</td>
<td>54%</td>
<td>10%</td>
</tr>
<tr>
<td>All disabled</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>Mobility</td>
<td>17%</td>
<td>25%</td>
</tr>
<tr>
<td>Hearing</td>
<td>20%*</td>
<td>29%</td>
</tr>
<tr>
<td>Visual</td>
<td>34%</td>
<td>/ **</td>
</tr>
<tr>
<td>Multiple</td>
<td>12%*</td>
<td>27%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014
Caution: * between 50 and 100 therefore indicative only; ** under 50 therefore not reported
ΟΟ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

Consumers with multiple disabilities were the least likely to be employed, and the most likely to be retired

Around a fifth (22%) of disabled consumers were in employment in 2014, compared to almost three-fifths (56%) of non-disabled consumers (Figure 4). In both groups there had been an increase since 2012 in the proportions in employment: disabled up by 5pp and non-disabled by 3pp. The proportions of mobility-, hearing- and visually-impaired consumers in employment had all increased since 2012 (from 10% to 18%, 25% to 31% and 33% to 41% respectively), and the proportion of those with multiple impairments in retirement had decreased (down 6pp to 69%).

Thirteen per cent of disabled consumers reported their working status as ‘not working due to disability or long-term illness’ - a decrease of 2pp since 2012. The proportion of mobility-impaired consumers in this category had halved since 2012, from 16% to 8%, the same amount as the increase in employment (8pp). Visually-impaired consumers also halved their proportion in this category, down 3pp to 2%, although this was a smaller change than the increase in employment (up 6pp).

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* Analysis of combined age and socio-economic profiles of consumers with a learning disability cannot be included due to the low sample of this disability group achieved within the 2014 survey
Consumers with multiple impairments, of working age, were the least likely to be employed

Given the differing age profiles across the disability groups, the data on working status has been analysed among consumers aged under 65, to reduce the age effect. For consumers in this age band, the gap between non-disabled consumers in employment (66%) and disabled consumers in employment (38%) narrows, compared to the overall comparison shown above (Figure 5).

The proportion in employment within each disability group increases (unsurprisingly) among under-65s; those with hearing or visual impairment reporting levels of employment closest to (albeit significantly lower than) that of non-disabled consumers in this age band (61%, 60% and 66% respectively).

The proportions of consumers with a mobility impairment or multiple impairments who were not working due to a long-term disability or illness was significantly higher among this age group than among those aged 65+, at 20% and 35% respectively.
Disabled consumers were more likely than non-disabled consumers to live alone, particularly those with mobility or multiple impairments

Disabled consumers were more likely than non-disabled consumers to live in single-person households. More than a third (36%) said they lived alone, compared with 16% of non-disabled consumers (Figure 6).

Those with either a mobility impairment (40%) or multiple impairments (46%) were the most likely to live in single-person households, which may reflect the older age profile of these disability groups. Conversely, those who reported having hearing, visual or learning disabilities were less likely than non-disabled consumers to live alone (29%, 25% and 25% respectively).

Smaller proportions of consumers with a mobility, hearing or visual impairment lived alone in 2014 than in 2012, and a greater proportion of those with a mobility impairment lived in a household of three or more. The proportion of consumers with multiple impairments living in households consisting of two people decreased from 43% to 37%.

Consumers with a learning disability were the most likely of all disabled groups to live in a household of three or more people (42%). This may be a reflection of their younger profile and therefore the higher probability of their living in the parental home.

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10 Analysis of working status of consumers with a learning disability under 65 cannot be included due to the low sample of this disability group achieved within the 2014 survey
Both disabled and non-disabled consumers were more likely to live alone as they got older.

Figure 7 looks at household size within age, and shows a clear trend: the older a person was, the more likely they were to live alone. However, disabled consumers were more likely to live alone, at all ages, than non-disabled consumers. The difference in the proportions of disabled and non-disabled people living alone was most marked in the 35-54 age group; a quarter (26%) of disabled consumers, compared to one in ten (11%) non-disabled consumers. The differences between proportions of non-disabled and disabled consumers living alone decreased with age.
Consumers with mobility, hearing or visual impairments were less likely to be severely disabled, and more likely to have a partial disability

More than one in ten (14%) consumers with a mobility impairment were unable to walk at all, or used a wheelchair, with a quarter (25%) having limited reach (Figure 8). A much larger proportion (69%) were unable to walk very far or manage the stairs, or did so with difficulty.

Among consumers with a hearing impairment, the majority (86%) self-reported as having partial hearing, with the remainder classifying themselves as deaf (14%).

Like hearing-impaired consumers, the majority (89%) of those with a visual impairment stated they had poor or partial sight, with one in ten (11%) classifying themselves as blind.

Among those who had two or more of the above impairments (i.e. multiple impairments) the most common disabilities were difficulty walking (60%), poor or partial hearing (61%) and poor or partial sight (60%).

**Figure 8 Proportion of disability impairments, by disability group**¹¹

<table>
<thead>
<tr>
<th></th>
<th>Mobility</th>
<th>Hearing</th>
<th>Visual</th>
<th>Multiple</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cannot walk / use a wheelchair</td>
<td>14%</td>
<td></td>
<td></td>
<td>15%</td>
</tr>
<tr>
<td>Cannot walk very far or manage stairs, or do so with difficulty</td>
<td>69%</td>
<td></td>
<td></td>
<td>60%</td>
</tr>
<tr>
<td>Limited ability to reach</td>
<td>25%</td>
<td>14%</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Deaf</td>
<td></td>
<td>14%</td>
<td></td>
<td>14%</td>
</tr>
<tr>
<td>Poor or partial hearing</td>
<td></td>
<td>86%</td>
<td>61%</td>
<td></td>
</tr>
<tr>
<td>Blind</td>
<td></td>
<td></td>
<td>11%</td>
<td>6%</td>
</tr>
<tr>
<td>Poor or partial sight</td>
<td></td>
<td></td>
<td>89%</td>
<td>60%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859, mobility-impaired: 845, hearing-impaired: 457, visually-impaired: 319, multiple impairments: 698

¹¹ Consumers with a learning disability were not asked the severity of their disability within the survey
Section 4

Access to devices and services: overview

4.1 Introduction

The Disabled consumers’ ownership of communications devices report (published in 2013 and based on 2012 data) provided analysis of household ownership of devices and services among consumers with mobility, hearing, visual or multiple impairments.12

This overview section focuses on the 2014 findings and includes comparisons to 2012 where possible. It also incorporates analysis among consumers with a learning disability, which were not included in the previous report. It provides an overview of device and service access (in the home) at an overall level by disability, and the overall impact of age, socio-economic group, working status and household size.

4.2 Key trends

4.2.1 Overview

- **Access to communication devices and services in the home was generally lower among consumers with a disability than among those without.** Two exceptions to this were landline telephony and free-to-air TV in the home. Take-up of each of these services among disabled consumers was higher than among non-disabled consumers, despite decreases since 2012 in both groups for each service. The largest gap in access to devices and services in 2014 between disabled and non-disabled consumers was for internet access (65% and 88% respectively).

- **There were significant increases in access to connected devices among disabled consumers since 2012.** Access to web-enabled/ ‘connected’ devices increased among both disabled and non-disabled consumers. Access to smartphones in the home increased by 18pp (to 66%) for non-disabled consumers in 2014, and by 14pp (to 41%) among disabled consumers. Access to a tablet computer in the home tripled for disabled consumers (up 21pp to 30%), although non-disabled consumers saw a greater increase of 25pp (to 42%).

- **There were indications that factors other than age and socio-economic group limited access to communication devices and services, particularly among older disabled consumers.** Demographic differences explain many of the differences in access levels between disabled and non-disabled consumers. But variations were still evident when comparing common demographic groups, suggesting that factors other than age and socio-economic group limit access, or at least compound the effects of these demographics. The largest gap related to internet access among older ABC1s, which stood at 76% among non-disabled consumers and 51% among consumers with a disability in this same demographic.

- **Household size was an additional factor in access to communications services and devices among disabled consumers.** Those living in larger households benefited from access to devices and services owned by others within the home.

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Those living alone or in smaller households were significantly less likely to have access to these devices/services.

4.2.2 Internet access and connected devices (PCs/laptops, tablets, and smartphones)

- **Internet access among disabled consumers was significantly lower than for non-disabled consumers.** Despite increases in access for each disability group since 2012 (with the exception of hearing-impaired consumers, where levels were unchanged), access remained lower among disabled consumers (65% overall) than among non-disabled consumers (88%). Consumers with multiple impairments had the lowest levels of access at 49%, while visually-impaired consumers and those with a learning disability had the highest levels of access among the disability groups (at 75% and 73% respectively).

- **Factors other than age and socio-economic group affected levels of internet access for people with mobility or multiple impairments.** Younger (under 65) disabled consumers in socio-economic group ABC1 tended to report comparable levels of internet access as non-disabled consumers in the same demographic group, with the exception of those with multiple impairments. For these consumers, internet access tended to be lower than for non-disabled consumers within each of the combined age and socio-economic groups. This suggests that other factors limit access for these groups; perhaps not benefiting from access to devices owned by other household members (given the increased likelihood that they live alone), or their disability - perhaps visual impairment or a limited ability to reach.\(^{13}\)

- **The proportion of disabled consumers with access to a tablet in the home tripled between 2012 and 2014, but remained lower than among non-disabled consumers.** Both groups saw a significant increase in access since 2012; non-disabled consumers up by 25pp (to 42%), and disabled consumers up by 21pp (to 30%), with increases evident across each disability group. Consumers with a learning disability were the only group with access levels comparable to non-disabled consumers.

- **As with tablets, access to a smartphone in the home had increased significantly for both disabled and non-disabled consumers since 2012.** Despite increases among each disability group, disabled consumers overall continued to have lower levels of access to these devices than did non-disabled consumers (41% vs. 66%). Reflecting their younger profile, consumers with a learning disability were the most likely to have access to a smartphone (57%), albeit still significantly lower than that of non-disabled consumers.

- **Consistent with the rise in access to mobile devices, the proportion of disabled consumers accessing the internet in this way had increased significantly since 2012.** The majority of internet users – with or without a disability - said they accessed the internet at home. Accessing the internet via a mobile device had increased significantly since 2012 for both disabled and non-disabled consumers, influenced by the increases in access to connected devices such as smartphones and tablets.

\(^{13}\) 60% of consumers with multiple disabilities said they had poor/partial sight, and 23% said they had limited ability to reach
least popular choices for both, although a higher proportion of both groups were using the internet for these activities than in 2012. Consumers with a learning disability were significantly more likely than non-disabled consumers to use the internet for gaming, perhaps a reflection of their younger age profile; this was the only activity with higher usage levels than among non-disabled consumers.

4.2.3 Telecoms access (landline and any type of mobile phone)

- **Levels of access to a landline in the home were higher among disabled consumers than among non-disabled, driven by their older age profile.** Almost eight in ten (77%) disabled consumers had a landline in the home, compared to seven in ten (72%) non-disabled consumers. Landline access among both groups had declined since 2012. Access was more prevalent among disabled consumers aged 65+, with both mobility and multiple impaired consumers in C2DE (87% and 92% respectively) being more likely to have access than their non-disabled counterparts (80%). Overall, visually-impaired consumers and those with a learning disability both had comparable levels of access to a landline (75% and 66% respectively) as non-disabled consumers.

- **Despite a rise in any type of mobile phone (simple or smartphone) access within the household, disabled consumers remained less likely than non-disabled consumers to have access.** The proportion of disabled consumers with access to any type of mobile phone rose by 4pp to 85%. This compares to a 2pp increase among non-disabled consumers, and access levels of 89%. Disabled consumers’ increased access was driven by an increase among consumers with multiple impairments.

4.2.4 Broadcast access (TV and radio)

- **Disabled consumers were more likely than non-disabled consumers to have access to a free-to-air TV service, and less likely to have pay TV in their homes.** Access to a free-to-air TV service (Freeview/Freesat) had decreased since 2012 for both groups, although disabled consumers continued to have higher levels of access (60%) than non-disabled consumers (50%). In contrast, disabled consumers were less likely than non-disabled consumers to have access to pay TV (satellite/cable) (48% vs. 55%), with neither group seeing a change in access levels since 2012.

- **A quarter of both disabled and non-disabled consumers had access to a DAB radio in the home.** Access for non-disabled consumers remained unchanged since 2012 (26%), but for disabled consumers had increased by 4pp (to 25%), bringing them into line with non-disabled consumers. Increases were evident among both mobility and multiple-impaired consumers.
4.3 Overview of access

This section provides an overview of levels of access to each of the communication devices and services within each disability group, and makes trend comparisons where available.\textsuperscript{14}

Access to devices and services was generally lower among those with a disability than among non-disabled consumers

With the exception of landline telephony and a free-to-air (Freeview/Freesat) TV service in the home, access to communication devices and services was generally lower among those with a disability than among non-disabled consumers (Figure 9). The largest gaps in access were for smartphones and the internet, with non-disabled consumers having levels around 25pp higher than that of disabled consumers.

Landlines, DAB radios and free-to-air TV were the only services/devices where access was not lower, and in fact for both free-to-air TV and landlines, disabled consumers were more likely to have access than were non-disabled consumers.

There were some differences in access levels across disability groups. The youngest group (those with a learning disability) reported access levels to all devices except PCs/laptops and the internet as not significantly different from those among non-disabled consumers.

<table>
<thead>
<tr>
<th>Figure 9 Household devices/services: access overview</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Non-disabled</strong></td>
</tr>
<tr>
<td>---</td>
</tr>
<tr>
<td>Landline</td>
</tr>
<tr>
<td>Any mobile</td>
</tr>
<tr>
<td>Smartphone</td>
</tr>
<tr>
<td>PC/laptop</td>
</tr>
<tr>
<td>Internet access</td>
</tr>
<tr>
<td>Tablet</td>
</tr>
<tr>
<td>Games console</td>
</tr>
<tr>
<td>Pay TV</td>
</tr>
<tr>
<td>Free-to-air TV</td>
</tr>
<tr>
<td>DAB</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August – 20 November 2014
\*Internet access is based on personal access anywhere — other services and devices are based on presence in home rather than individual access.

\( \bullet \bullet = \) Notes whether each disability group in 2014 was statistically significantly higher or lower than non-disabled consumers (red=lower, green=higher)

\( \uparrow \downarrow = \) Notes whether each disability group in 2014 was statistically significantly higher or lower than the same disability group in 2012 (Consumers with a learning disability were not defined in the 2012 survey, therefore comparison cannot be made to this group)

\textsuperscript{14} Trend comparison to 2012 cannot be shown for consumers with a learning disability, as this group were not included in the 2012 survey
Access to smartphones and tablets increased significantly for all disability groups, but remained lower than for non-disabled consumers

As shown in Figure 9, access to both smartphones and tablets increased significantly for each of the disability groups reported on. PC/laptop access also increased among those with either mobility or hearing impairments.

Perhaps driven partly by growth in access to connected devices, noted above, internet access also rose for consumers with mobility, visual or multiple disabilities.

At an overall level (among all disabled consumers), access to a landline and to free-to-air TV both fell between 2012 and 2014. But despite these drops, disabled consumers were more likely than non-disabled consumers to have access to these services in the home.

Further analysis by disability type can be found in sections 7-11.

4.3.1 Impact of demographics on access levels

This section explores access levels among disabled consumers, by broad age and socio-economic group, working status and household size. This analysis enables us to better understand the factors that may be driving the differing access levels at an overall level.

Access to a computing device or the internet was lower for disabled consumers, irrespective of age

Among the total disabled sample, as was the case among non-disabled consumers, the general pattern was for higher levels of access to devices and services in the home among younger consumers (under 65 years), and lower levels among older consumers (Figure 10). The exceptions were for a landline and a free-to-air (Freeview/Freesat) TV service, which showed higher levels of access among older consumers (aged 65+). Despite greater access to a free-to-air TV service among older consumers, disabled consumers under 65 were more likely to have access to this particular service than were non-disabled consumers in this age group (55% vs. 47%).

Access to any type of mobile phone in the home showed the same level of access for non-disabled and disabled consumers under 65 (91%), but the 65+ disabled consumers were less likely to have access to a mobile phone than their non-disabled counterparts (77% vs. 81%). Smartphone access, however, was lower among disabled consumers across both broad age ranges, with the biggest gap among under-65s (59% vs. 75%).

Similarly, levels of access to a PC/laptop, a tablet, and the internet, were all lower among over-65s than under-65s, whether disabled or not. Access was also lower among disabled than non-disabled, in both age groups. The biggest differences were in relation to internet access: a 26pp difference between older (65+) consumers with a disability, compared to those without, and a 20pp difference between younger (under-65) disabled consumers compared to non-disabled consumers in this age bracket.

Access to a pay TV service (satellite/cable) was more likely among consumers under 65, although disabled consumers under 65 were less likely than non-disabled consumers to have this service (54% vs. 58%).

Access to DAB radio was comparable between non-disabled consumers and disabled consumers under 65 (at 25% each). However, disabled consumers aged 65+ were less likely than their non-disabled counterparts to have access (31% vs. 26%).

Further analysis by disability type and age groups can be found in sections 7-11.
Disabled C2DE consumers reported lower levels of access to most devices/services in the home, with the exception of free-to-air TV

Access to most devices and services was higher among ABC1 than C2DE groups, both for non-disabled and disabled consumers (Figure 11). The only exception was access to a free-to-air TV service (Freeview/Freesat) which was at similar levels in both socio-economic groups, although higher among disabled consumers.

Mobile and landline access among disabled consumers in socio-economic group ABC1 were comparable to, or higher than that of, non-disabled consumers in this group. However, access to connected devices (smartphones, PCs/laptops and tablets), the internet, and a pay-TV service (satellite/cable) was lower for disabled than for non-disabled ABC1 consumers. This was most evident in relation to smartphone access (a 20pp difference) and internet access (a 15pp difference). These gaps widened further among disabled consumers in socio-economic group C2DE, to 27pp and 26pp respectively.

As with the other devices and services, access to a landline was lower for C2DE than ABC1 consumers, regardless of disability. However, access was more likely among disabled consumers than non-disabled consumers, in both socio-economic groups.

Access to a DAB radio was lower for C2DE consumers than for ABC1s, and was comparable between non-disabled and disabled consumers in both groups.
Disability may be limiting or compounding the demographic effect on access to devices and services for some consumers aged 65+

In order to understand more about what is driving the lower levels of access to some devices and services among older consumers and within socio-economic groups, the following analysis combines these demographics. This allows us to understand the extent to which factors other than age and income might be limiting take-up of core services, at an overall level.

While the gaps in access levels between disabled and non-disabled consumers narrow when comparing consumers within the same combined age and socio-economic group, the research shows lower levels of access to many devices and services among disabled consumers aged 65+ in each broad socio-economic group (Figure 12). This analysis suggests that other factors, such as disability, may be limiting access for some consumers.

For example, the largest gap was for internet access, which stands at 76% among non-disabled consumers aged 65+ in socio-economic group ABC1, compared to 51% among disabled consumers in this same demographic.
Figure 12 Household device/service access: the combined effect of age (65+) and socio-economic group

Source: British Population Survey, 1 August – 20 November 2014

Notes whether each disability group in 2014 were statistically significantly higher or lower than non-disabled consumers (red=lower, green=higher)

*Internet access is based on personal access anywhere – other services and devices are based on presence in home rather than individual access

Disabled consumers in employment were as likely as non-disabled employed consumers to have access to most communication devices and services

While overall, household access to devices and services was generally lower for disabled than for non-disabled consumers, the differences were less marked when comparing consumers who were in employment, with very little difference in penetration levels for most devices and services.

The exceptions to this, among employed disabled and non-disabled consumers, were for access to a smartphone (67% vs. 76%) and to the internet (92% vs. 95%), where non-disabled consumers were slightly, but significantly, more likely to have access (Figure 13). A contrasting exception was for access to a landline, where disabled consumers in employment were more likely to have access to this service (77%) than employed non-disabled consumers (73%).

Among those in retirement, landline access was higher for disabled consumers than for non-disabled consumers (86% vs. 83%). However, there were more instances of lower access for disabled consumers in this demographic, with the exception of free-to-air TV, which was comparable. The biggest difference among retired consumers was for internet access; 48% of retired disabled consumers had access, compared to 64% of retired non-disabled consumers.
Disabled consumers in larger households were more likely than non-disabled consumers overall to have access to most devices and services

Within the survey, most of the questions were based on household rather than individual access to devices and services (with the exception of internet access which was ‘personal access’). The following section therefore explores differences by household size. It is possible to identify disabled-only households, i.e. single-person disabled households; it may also be the case that some multiple-person households included in the survey were also ‘disabled-only’ but we were unable to establish this from the data collected.

With the exception of a free-to-air TV service (Freeview/Freesat), where the converse was seen, access to each device/service in disabled households was highest in larger households and lowest in single-person households (Figure 14). Multiple households tended to be younger and may have been subject to the positive impact of children as influencers of take-up.
4.3.2 Focus on internet access and connected devices (PCs/laptops, tablets, and smartphones)

The following section explores household access to connected devices (PC/laptop, tablet and smartphone), whether disabled consumers had access to the internet and if so, how much they personally used it, and what they used it for. Internet access was based on access anywhere (i.e. both inside and outside the home, including use via mobile devices).

Consumers with learning disabilities were less likely than non-disabled consumers to have access to the internet at home

Over nine in ten consumers, with or without a disability, said they accessed the internet at home (Figure 15). Consumers with learning disabilities were the only disability group to have lower levels of access at home (88%) than non-disabled consumers (93%) in 2014.

Accessing the internet outside the home, via a PC at work/school/university or in a public place (such as an internet café or library), was lower for disabled consumers overall (24%) than for non-disabled consumers (38%). However, both groups had increased this type of access since 2012.

Increasing proportions in all groups stated that they were using a mobile device (e.g. a smartphone or tablet) to access the internet. Consumers with a learning disability were the most likely to say they accessed the internet in this way (60%), comparable with non-disabled consumers (59%). Despite the increases among the other disability groups, access to the internet via a mobile device remained lower for disabled consumers overall, and this was reflected in each disability group, with the exception of consumers with a learning disability.

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15 Consumers with a learning disability were not included within the 2012 survey, therefore comparisons cannot be made

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Figure 14 Household device/service ownership access: impact of household size

<table>
<thead>
<tr>
<th></th>
<th>Disabled Household size 1</th>
<th>Disabled Household size 2</th>
<th>Disabled Household size 3+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landline</td>
<td>73%</td>
<td>83%</td>
<td>76%</td>
</tr>
<tr>
<td>Any mobile</td>
<td>77%</td>
<td>87%</td>
<td>92%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>22%</td>
<td>41%</td>
<td>68%</td>
</tr>
<tr>
<td>PC/laptop</td>
<td>43%</td>
<td>71%</td>
<td>83%</td>
</tr>
<tr>
<td>Internet access</td>
<td>46%</td>
<td>69%</td>
<td>85%</td>
</tr>
<tr>
<td>Tablet</td>
<td>14%</td>
<td>32%</td>
<td>49%</td>
</tr>
<tr>
<td>Pay-TV</td>
<td>34%</td>
<td>50%</td>
<td>63%</td>
</tr>
<tr>
<td>Free-to-air TV</td>
<td>66%</td>
<td>61%</td>
<td>49%</td>
</tr>
<tr>
<td>DAB</td>
<td>19%</td>
<td>31%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August – 20 November 2014
Base: disabled household size 1: 1,447; disabled household size 2: 1,466; disabled household size 3+: 1,053
*Internet access is based on personal access anywhere – other services and devices are based on presence in home rather than individual access
Eight in ten consumers, with or without a disability, had had access to the internet for at least six years

Among those with internet access, eight in ten (80%) non-disabled and disabled users had been online for more than six years (Figure 15). This represents an increase for both groups since 2012, when 73% and 68% respectively had been online for more than 6 years. This increase was reflected across each disability group.

Disabled consumers with internet access continued to use the internet less frequently than non-disabled internet users

Most non-disabled and disabled internet users said they used the internet several times a day, although this remained lower among disabled consumers, at 62% compared to 76% among non-disabled consumers (Figure 15). Frequency of access had increased for both groups since 2012, specifically for hearing and multiple-impaired consumers.

More disabled consumers were using the internet for shopping, driven by a rise among those with mobility impairments

The most popular listed internet activity for both non-disabled and disabled consumers was ‘communications’ (96% and 91% respectively), including emailing, VoIP and social networking (Figure 16).

Using the internet to obtain information about interests, or products, was the next most popular choice, for both non-disabled (88%) and disabled consumers (86%). Again, in neither group had the proportion of consumers using the internet for this reason changed since 2012.

The proportion of disabled consumers stating they used the used the internet for online shopping had increased by 7pp to 66% since 2012. This rise was largely driven by mobility-
impaired consumers. Despite this rise, these consumers, and those with multiple impairments or learning disabilities, remained less likely than non-disabled consumers to shop online.

Gaming continued to be the least popular online activity. Consumers with a learning disability were significantly more likely than non-disabled consumers to use the internet for gaming (31%); a reflection of their younger age profile.

Use of the internet for audio-visual content (music, video and TV) increased for both non-disabled (49%) and disabled consumers (40%), although disabled consumers remained less likely to use the internet in this way.

**Figure 16 Internet activities, by type of disability**

<table>
<thead>
<tr>
<th>Type of internet usage</th>
<th>Non-disabled</th>
<th>All disabled</th>
<th>Mobility impairment</th>
<th>Hearing impairment</th>
<th>Visual impairment</th>
<th>Multiple impairment</th>
<th>Learning disability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications (email, VOIP, social networking)</td>
<td>96%</td>
<td>91%</td>
<td>95%</td>
<td>92%</td>
<td>94%</td>
<td>87%</td>
<td>91%</td>
</tr>
<tr>
<td>Information (on interests &amp; products)</td>
<td>88%</td>
<td>86%</td>
<td>84%</td>
<td>87%</td>
<td>85%</td>
<td>84%</td>
<td>62%</td>
</tr>
<tr>
<td>Shopping (groceries &amp; other)</td>
<td>71%</td>
<td>66%</td>
<td>64%</td>
<td>67%</td>
<td>67%</td>
<td>61%</td>
<td>63%</td>
</tr>
<tr>
<td>Gaming (games &amp; gambling)</td>
<td>21%</td>
<td>21%</td>
<td>16%</td>
<td>14%</td>
<td>18%</td>
<td>21%</td>
<td>31%</td>
</tr>
<tr>
<td>AV (music, video, TV)</td>
<td>49%</td>
<td>40%</td>
<td>32%</td>
<td>38%</td>
<td>43%</td>
<td>35%</td>
<td>54%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014
Base: Consumers with internet access; non-disabled: 13,519, all disabled: 2,602, mobility impairment: 508, hearing impairment: 317, visual impairment: 239, multiple impairments: 344, learning disability: 146
*VoIP added to 2014 survey
○○ = Notes whether each disability group are statistically significantly higher or lower than non-disabled consumers (red = lower, green = higher)
↑↓ = Statistically significant difference at 95% confidence level compared to 2012

**4.3.2.1 The impact of factors other than age and socio-economic group on internet access**

The analysis below seeks to understand whether factors other than age and income are affecting internet access for disabled consumers. This is done by comparing access levels within a combined age and socio-economic group between disabled and non-disabled consumers.

**Factors other than age and socio-economic group are impacting internet access for people with mobility and multiple impairments**

Younger (under 65) disabled consumers in socio-economic group ABC1 tend to report levels of internet access comparable with non-disabled consumers in the same demographic (Figure 17). This suggests that within this demographic (ABC1s under 65), varying access levels across the disability groups, compared to non-disabled consumers, can largely be explained by age and SEG profile. Within this demographic, the only exception was consumers with multiple impairments, whose internet access levels were lower than those of non-disabled consumers.
In fact, for consumers with multiple impairments, internet access was lower than for non-disabled consumers within all of the combined age and socio-economic groups. This strongly suggests that other factors were limiting access for this group of disabled consumers; perhaps lower access to connected devices within the household (given the increased likelihood that they live alone) or aspects of their disability such as visual impairment or limited ability to reach. A similar story exists for those with mobility impairments, with the exception of younger (under-65) ABC1s with this impairment.

Internet access among people with a hearing impairment, within these combined age and socio-economic groups, was the most similar to that of non-disabled consumers in the same demographic groups. This suggests that generally, the lower levels of internet access for these consumers can be explained by the older age profile of people with a hearing impairment, compared to non-disabled consumers (i.e. 54% aged 65+ vs. 18% respectively).

The sample size for consumers with a visual impairment was too low to enable us to draw any firm conclusions about whether other factors exist, but there were indications that they did, at least for older C2DEs.

In Section 6, the report sets out disabled consumers’ views on the extent to which their disability limits or prevents their access to, or use of, communications services. Further analysis of this type is included in sections 7-11.

**Figure 17 Personal internet access, within combined age and socio-economic group, by type of disability**

<table>
<thead>
<tr>
<th>Internet access by age within socio-economic group</th>
<th>Non-disabled</th>
<th>Mobility impairment</th>
<th>Hearing impairment</th>
<th>Visual impairment</th>
<th>Multiple impairments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>88%</td>
<td>60%</td>
<td>69%</td>
<td>75%</td>
<td>49%</td>
</tr>
<tr>
<td>Aged under 65</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC1</td>
<td>98%</td>
<td>94%</td>
<td>95%*</td>
<td>97%</td>
<td>85%</td>
</tr>
<tr>
<td>C2DE</td>
<td>89%</td>
<td>78%</td>
<td>80%</td>
<td>88%</td>
<td>61%</td>
</tr>
<tr>
<td>Aged 65+</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC1</td>
<td>76%</td>
<td>64%</td>
<td>70%</td>
<td>/ **</td>
<td>55%</td>
</tr>
<tr>
<td>C2DE</td>
<td>42%</td>
<td>27%</td>
<td>38%</td>
<td>23%*</td>
<td>27%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014
Caution: * between 50 and 100 therefore indicative only; ** under 50 therefore not reported
O O Notes whether each disability group are statistically significantly higher or lower than non-disabled consumers (red = lower, green = higher)

**Lower levels of access to a PC and/or laptop among hearing-impaired consumers was largely explained by their older profile**

As with internet access, the analysis in Figure 18 below indicates that people with mobility or multiple disabilities were the most likely to have factors other than age and income that constrained their access to PCs/laptops. Household size may be a contributory factor, as more people within these disability groups live alone (40% and 46% respectively compared to 16% among non-disabled consumers), and so do not have the benefit of accessing

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16 60% of consumers with multiple disabilities said they had poor/partial sight, and 23% said they had limited ability to reach
devices owned by other members of the household. Access to these devices was significantly lower than for non-disabled consumers for all except under-65 ABC1s in these two disability groups.

However, consumers with hearing impairments reported levels of PC/laptop access comparable to non-disabled consumers, in all the combined demographic groups. This suggests that the lower access to these devices largely reflects the older demographic profile of people with hearing impairments.

As before, the analysis for people with visual impairments is limited by the lower sample sizes, but there are indications that factors other than age and income, perhaps disability, are limiting access to these devices.

**Figure 18 Access to a PC/laptop, within combined age and socio-economic group, by type of disability**

<table>
<thead>
<tr>
<th>PC/laptop access by broad age within socio-economic group</th>
<th>Non-disabled</th>
<th>Mobility impairment</th>
<th>Hearing impairment</th>
<th>Visual impairment</th>
<th>Multiple impairments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>79%</td>
<td>59%</td>
<td>71%</td>
<td>66%</td>
<td>54%</td>
</tr>
<tr>
<td>Aged under 65</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC1</td>
<td>88%</td>
<td>88%</td>
<td>88%*</td>
<td>89%</td>
<td>81%*</td>
</tr>
<tr>
<td>C2DE</td>
<td>77%</td>
<td>69%</td>
<td>74%</td>
<td>63%</td>
<td>65%</td>
</tr>
<tr>
<td>Aged 65+</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC1</td>
<td>74%</td>
<td>63%</td>
<td>77%</td>
<td></td>
<td>62%</td>
</tr>
<tr>
<td>C2DE</td>
<td>47%</td>
<td>33%</td>
<td>46%</td>
<td>30%*</td>
<td>33%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014
Caution: * between 50 and 100 therefore indicative only; ** under 50 therefore not reported
OO= Notes whether each disability group are statistically significantly higher or lower than non-disabled consumers (red = lower, green = higher)

Younger consumers with mobility or hearing impairments were less likely than non-disabled consumers to have access to a tablet

Access to a tablet was lower among each disability group than among non-disabled consumers. When comparing access within combined age groups and socio-economic groups, the findings were similar to those for access to a PC/laptop (Figure 19).

Mobility-impaired consumers in the C2DE socio-economic group reported lower levels of access than their non-disabled counterparts to a tablet, regardless of age. Multiple-impaired consumers reported lower levels of access than non-disabled consumers among the older age group (65+), regardless of socio-economic group.

Unlike the results for PCs/laptops, younger hearing-impaired consumers in the ABC1 group had lower levels of access than younger ABC1 non-disabled consumers to tablets, suggesting that their disability may have been a factor in this.
Figure 19 Access to a tablet, within combined age and socio-economic group, by type of disability

<table>
<thead>
<tr>
<th>Tablet access by broad age within socio-economic group</th>
<th>Non-disabled</th>
<th>Mobility impairment</th>
<th>Hearing impairment</th>
<th>Visual impairment</th>
<th>Multiple impairments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>42%</td>
<td>27%</td>
<td>32%</td>
<td>33%</td>
<td>23%</td>
</tr>
<tr>
<td>Aged under 65</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC1</td>
<td>55%</td>
<td>57%</td>
<td>44%</td>
<td>57%</td>
<td>50%*</td>
</tr>
<tr>
<td>C2DE</td>
<td>35%</td>
<td>27%</td>
<td>33%</td>
<td>26%</td>
<td>32%</td>
</tr>
<tr>
<td>Aged 65+</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC1</td>
<td>35%</td>
<td>29%</td>
<td>40%</td>
<td>/ **</td>
<td>25%</td>
</tr>
<tr>
<td>C2DE</td>
<td>16%</td>
<td>11%</td>
<td>14%</td>
<td>11%*</td>
<td>9%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014
Caution: * between 50 and 100 therefore indicative only; ** under 50 therefore not reported
OO= Notes whether each disability group are statistically significantly higher or lower than non-disabled consumers (red = lower, green = higher)

Household size may be a factor limiting access to smartphones for some disabled consumers, given the increased likelihood in some groups to live alone

Smartphone access was lower both among those with mobility or multiple impairments, even when comparing levels within combined age and socio-economic groups (Figure 20). As noted above, it is possible that household size was an additional factor limiting access for these consumers, as they did not have the benefit of accessing other household members’ devices. It is also possible that aspects of the disability, i.e. poor or partial vision, were limiting ownership/access.

As noted above, while analysis is limited for those with a visual impairment, it indicates that smartphone access was lower among under-65 C2DEs with a visual impairment than among non-disabled consumers in the same demographic, as was the case for hearing-impaired consumers in this demographic group.
Figure 20 Access to a smartphone, within combined age and socio-economic group, by type of disability

<table>
<thead>
<tr>
<th>Smartphone access by broad age within socio-economic group</th>
<th>Non-disabled</th>
<th>Mobility impairment</th>
<th>Hearing impairment</th>
<th>Visual impairment</th>
<th>Multiple impairments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>66%</td>
<td>31%</td>
<td>46%</td>
<td>48%</td>
<td>29%</td>
</tr>
<tr>
<td>Aged under 65</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC1</td>
<td>78%</td>
<td>69%</td>
<td>73%*</td>
<td>73%</td>
<td>61%*</td>
</tr>
<tr>
<td>C2DE</td>
<td>71%</td>
<td>48%</td>
<td>55%</td>
<td>52%</td>
<td>49%</td>
</tr>
<tr>
<td>Aged 65+</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC1</td>
<td>35%</td>
<td>20%</td>
<td>43%</td>
<td>/ **</td>
<td>24%</td>
</tr>
<tr>
<td>C2DE</td>
<td>18%</td>
<td>9%</td>
<td>18%</td>
<td>11%*</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014
Caution: * between 50 and 100 therefore indicative only; ** under 50 therefore not reported

4.3.3 Focus on telecoms access (landline and any type of mobile phone)

Access to a landline in the home was generally higher among consumers with a disability, in particular for older C2DEs with a mobility or hearing impairment

Access to a landline in the home was higher among consumers in each of the disability groups than among non-disabled consumers, with the exception of visually-impaired consumers, who had comparable levels of access. Those with hearing or multiple impairments were the most likely to have access to a landline (83% and 82% respectively), while those with a mobility impairment had slightly lower access at 79% - but all were higher than the proportion of non-disabled consumers (72%).

When comparing landline access within combined age and socio-economic groups, however, there are few differences. This analysis suggests that, on the whole, the higher levels of landline access can largely be explained by age or socio-economic differences in profile, with the only exceptions being higher landline access among older (65+) C2DEs with a mobility or hearing impairment (Figure 21).
Older people with mobility impairments were less likely to have access to any type of mobile phone, limited by the increased likelihood that they live alone

With the exception of consumers with a hearing impairment, access to a mobile phone (simple or smartphone) in the home was lower among each of the disability groups, compared to non-disabled consumers (Figure 22).

The lower access levels among consumers with a mobility impairment were the least likely to be explained solely by demographic differences, in particular for older consumers in this group. However, as noted above in relation to smartphones, this might be explained by the increased likelihood of these consumers to live in a single-person household (40% live alone) and so not benefit from access to devices owned by other household members.
4.3.4 Focus on broadcast access (TV and radio)

The lower levels of pay-TV access can be largely explained by the differing socio-economic and age profiles of each disability group

Generally, access to pay-TV services (satellite/cable) was broadly comparable, among each combined age and socio-economic group within disability type, to that of non-disabled consumers (Figure 23). This suggests that most of the lower access levels can be explained by the group demographic profile, i.e. older and or more likely to be in socio-economic group C2DE.
### Figure 23 Household pay-TV access, within combined age and socio-economic group, by type of disability

<table>
<thead>
<tr>
<th>Pay-TV access by age within socio-economic group</th>
<th>Non-disabled</th>
<th>Mobility impairment</th>
<th>Hearing impairment</th>
<th>Visual impairment</th>
<th>Multiple impairments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>55%</td>
<td>43%</td>
<td>48%</td>
<td>48%</td>
<td>46%</td>
</tr>
<tr>
<td>Aged under 65 ABC1</td>
<td>59%</td>
<td>55%</td>
<td>53% *</td>
<td>65%</td>
<td>60% *</td>
</tr>
<tr>
<td>C2DE</td>
<td>57%</td>
<td>52%</td>
<td>58%</td>
<td>46%</td>
<td>57%</td>
</tr>
<tr>
<td>Aged 65+ ABC1</td>
<td>44%</td>
<td>44%</td>
<td>42%</td>
<td>/ **</td>
<td>44%</td>
</tr>
<tr>
<td>C2DE</td>
<td>40%</td>
<td>29%</td>
<td>42%</td>
<td>30% *</td>
<td>38%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014
Caution: * between 50 and 100 therefore indicative only; ** under 50 therefore not reported

There were broadly comparable levels of free-to-air TV services in the combined age and socio-economic groups

In contrast to pay-TV access, where disabled consumers had lower levels of access than non-disabled consumers, access to a free-to-air TV service in the home was higher for most groups of disabled consumers than for non-disabled consumers. When comparing access levels by combined age and socio-economic group within each disability type, there were very few differences (Figure 24). The largest difference was for younger (under-65) C2DEs with multiple impairments, for whom access to free-to-air TV services was 22pp higher than for non-disabled consumers in this demographic group.
Figure 24 Household free-to-air TV access, within combined age and socio-economic group, by type of disability

<table>
<thead>
<tr>
<th>Free-to-air TV access by age within socio-economic group</th>
<th>Non-disabled</th>
<th>Mobility impairment</th>
<th>Hearing impairment</th>
<th>Visual impairment</th>
<th>Multiple impairments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>50%</td>
<td>60%</td>
<td>61%</td>
<td>55%</td>
<td>65%</td>
</tr>
<tr>
<td>Aged under 65</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC1</td>
<td>47%</td>
<td>50%</td>
<td>55%*</td>
<td>45%</td>
<td>56%</td>
</tr>
<tr>
<td>C2DE</td>
<td>46%</td>
<td>53%</td>
<td>50%</td>
<td>51%</td>
<td>68%</td>
</tr>
<tr>
<td>Aged 65+</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC1</td>
<td>64%</td>
<td>64%</td>
<td>70%</td>
<td>/ **</td>
<td>68%</td>
</tr>
<tr>
<td>C2DE</td>
<td>63%</td>
<td>68%</td>
<td>65%</td>
<td>74%*</td>
<td>64%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014


Caution: * between 50 and 100 therefore indicative only; ** under 50 therefore not reported

<table>
<thead>
<tr>
<th>Non-disabled</th>
<th>Mobility impairment</th>
<th>Hearing impairment</th>
<th>Visual impairment</th>
<th>Multiple impairments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>26%</td>
<td>24%</td>
<td>30%</td>
<td>24%</td>
</tr>
<tr>
<td>Aged under 65</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC1</td>
<td>34%</td>
<td>39%</td>
<td>40%*</td>
<td>33%</td>
</tr>
<tr>
<td>C2DE</td>
<td>15%</td>
<td>14%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Aged 65+</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC1</td>
<td>39%</td>
<td>38%</td>
<td>42%</td>
<td>/ **</td>
</tr>
<tr>
<td>C2DE</td>
<td>21%</td>
<td>15%</td>
<td>21%</td>
<td>18% *</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014


Caution: * between 50 and 100 therefore indicative only; ** under 50 therefore not reported

<table>
<thead>
<tr>
<th>Non-disabled</th>
<th>Mobility impairment</th>
<th>Hearing impairment</th>
<th>Visual impairment</th>
<th>Multiple impairments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aged under 65</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C2DE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aged 65+</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C2DE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Access to a DAB radio in the home was comparable between disabled and non-disabled consumers

At an overall level, levels of DAB radio access in the home were broadly comparable between disabled and non-disabled consumers, and when comparing levels within combined age and socio-economic groups, there were very few differences (Figure 25).

Figure 25 Household DAB radio access, within combined age and socio-economic group, by type of disability

Access to a DAB radio in the home was comparable between disabled and non-disabled consumers

At an overall level, levels of DAB radio access in the home were broadly comparable between disabled and non-disabled consumers, and when comparing levels within combined age and socio-economic groups, there were very few differences (Figure 25).
Section 5

Personal use of devices and services: overview

5.1 Introduction

Our 2013 report compared ownership of /access to communication devices and services between disabled and non-disabled consumers, and now for the first time we are able to report on personal use among disabled consumers.

The analysis below compares levels of access and levels of personal use among disabled consumers and by disability, and highlights where gaps exist between the two.

5.2 Key trends

- The internet was the only service where levels of personal use across each disability group were comparable with access levels. This suggests that all those with access personally used the internet. In contrast, use of telecoms devices (landline and mobile) and tablets was significantly lower than access levels, across each disability group, highlighting that some disabled consumers, regardless of disability type, had access to these devices/services but did not use them.

- Each disability group had significantly lower levels of use of either a landline or any type of mobile phone, compared to their access levels. In relation to landline use, there were differences of between 9pp and 13pp between access and levels of use. Consumers with a learning disability were the disability group least likely to use a landline. The gap between access to and use of a mobile was between 13pp and 15pp for all except those with a learning disability. This group reported the smallest gap of 10pp between access and use.

- Unlike personal use of the internet, personal use of a tablet was significantly lower for each disability group compared to access level. A proportion of consumers within each disability group said they had access to a tablet in the home, but did not personally use this device. Consumers with mobility or multiple disabilities reported the smallest gap between access and use, at 5pp and 6pp respectively. However, differences of around 9pp-10pp were evident for those with hearing, visual or learning disabilities. The latter group was the most likely to use a tablet (31%), linked to higher access levels (41% of this group had access to a tablet, comparable with access among non-disabled consumers).

- Consumers with hearing or multiple impairments had significantly lower levels of personal use of a DAB radio, compared to access levels to this device. For DAB radios, levels of access and use were closest among consumers with a mobility impairment; 24% had access to this device, comparable to the 21% who said they personally used it. For all other disability groups the gap between access and use was between 6pp-7pp.
5.3 Access levels compared to personal use of communication devices and services

Figure 26 compares access levels with the proportion of consumers who said they personally used each of the following devices and services: landline, mobile phone, the internet, tablet, DAB radio, and each TV platform.

The internet was the only service where levels of personal use across each disability group were similar to access levels, suggesting that all those with access personally used the internet. In contrast, use of telecoms services (landline and mobile), and tablets, were significantly lower than access levels across each disability group, highlighting that some disabled consumers, regardless of disability type, have access to these devices/services, but do not use them.

Figure 26 Comparison between access to, and personal use of, devices/services among disabled consumers

<table>
<thead>
<tr>
<th></th>
<th>Mobility impairment</th>
<th>Hearing impairment</th>
<th>Visual impairment</th>
<th>Multiple impairments</th>
<th>Learning disability</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Access</td>
<td>Personally use</td>
<td>Access</td>
<td>Personally use</td>
<td>Access</td>
</tr>
<tr>
<td>Landline</td>
<td>79%</td>
<td>70%</td>
<td>83%</td>
<td>72%</td>
<td>75%</td>
</tr>
<tr>
<td>Any mobile</td>
<td>80%</td>
<td>86%</td>
<td>86%</td>
<td>73%</td>
<td>83%</td>
</tr>
<tr>
<td>Internet</td>
<td>60%</td>
<td>59%</td>
<td>69%</td>
<td>68%</td>
<td>75%</td>
</tr>
<tr>
<td>Tablet</td>
<td>27%</td>
<td>21%</td>
<td>32%</td>
<td>22%</td>
<td>33%</td>
</tr>
<tr>
<td>DAB radio</td>
<td>24%</td>
<td>21%</td>
<td>30%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>Satellite TV</td>
<td>31%</td>
<td>27%</td>
<td>33%</td>
<td>26%</td>
<td>34%</td>
</tr>
<tr>
<td>Cable TV</td>
<td>13%</td>
<td>10%</td>
<td>18%</td>
<td>14%</td>
<td>18%</td>
</tr>
<tr>
<td>Freeview TV</td>
<td>57%</td>
<td>50%</td>
<td>58%</td>
<td>51%</td>
<td>53%</td>
</tr>
<tr>
<td>Freesat TV</td>
<td>5%</td>
<td>3%</td>
<td>7%</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014
O= Notes whether personal use levels of each device/service for each disability group were statistically significantly lower than access levels of each device/service for that group

5.3.1 Landline

Each disability group had significantly lower levels of personal use of a landline than levels of access to this device

When comparing the proportion of consumers within each disability group with landline access to the proportion who said they personally used this service/device, we see a difference of between 9pp and 13pp across disability groups. People with a learning disability were the least likely to use a landline (53%) and the least likely to have access to one (66%).

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17 Personal use of the internet is defined by those who access the internet at least once a month; other devices and services were specifically asked about if the respondent personally used them;
PCs/laptops are excluded from this table as the survey splits these when asking about personal use;
Television has been split by service, as the survey does not include this as a ‘device’ within access, but includes each service when asking about either access or personal use.
5.3.2 Mobile phone

As with a landline, each disability group had a significantly lower level of personal use of any type of mobile phone than level of access to this device

For mobile phones (simple or smartphone), the smallest gap between access and personal use was noted among those with a learning disability; 87% had access to a mobile in the home and 77% said they used it. The gap between levels of access and use across the other disability groups was broadly comparable, and ranged between 13pp and 15pp, although all had significantly lower levels of personal use than levels of access to this device.

5.3.3 Internet

All those with access to the internet also said they personally went online

There were no significant gaps between access levels and personal use of the internet across any disability group, suggesting that all those with internet access use it.

5.3.4 Tablet

Unlike personal use of the internet, personal use of a tablet was significantly lower for each disability group, compared to access levels

Each disability group reported lower levels of personal use of a tablet than access to one in the home. Consumers with mobility or multiple disabilities reported the smallest gap (5pp and 6pp respectively). However, differences of around 9pp - 10pp were evident for those with hearing, visual or learning disabilities. The latter was the group most likely to use a tablet (31%), linked to higher access levels (41% of this group had access to a tablet, similar to access levels among non-disabled consumers).

5.3.5 DAB radio

Consumers with hearing or multiple impairments had significantly lower levels of personal use of a DAB radio compared to access levels to this device

For DAB radios, levels of access and use were closest among consumers with a mobility impairment; 24% had access to this device while 21% said they personally used it. For all other disability groups the gap between access and use was between 6pp and 7pp.

5.3.6 Television, by platform

Fewer consumers with hearing, visual or multiple impairments personally used a pay-TV service than had access to the service

Personal use of a satellite TV service was comparable to levels of access to this service among consumers with a mobility, visual or learning disability. Consumers with a hearing impairment had the largest gap between access to this service and personal use of it (7pp).
However, when comparing access with personal use of a cable TV service, visually-impaired consumers were the only disability group to have significantly lower levels of personal use compared with access levels (18% vs. 12%) although mobility-impaired consumers had the lowest levels of both access and personal use among the disability groups.

Levels of personal use of a free-to-air TV service were significantly lower than access to this service, among most disability groups

There were more significant differences between personal use and access for free-to-air TV than for pay TV. Each disability group had significantly lower levels of personal use of Freeview than their level of access to this service. Visually-impaired consumers had the largest gap between access and use, at 11pp, while the other groups had differences of 9pp between access and personal use.

Nearly all disability groups had comparable (albeit much lower than Freeview) levels of access and personal use of Freesat as a TV service. Consumers with a mobility impairment were the only group with a significant gap between access and use (5% vs. 3%).

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18 The 9pp gap between levels of access and use for consumers with a learning disability was not statistically significant, due to the relatively low base size of this sub-group
Section 6

Stated limitations in use of devices and services: overview

In the 2014 survey, disabled consumers were asked whether they thought their disability limited, or prevented, them using communication devices and services.

As noted in Section 5, a proportion of consumers within each disability group had access to particular devices/services but did not personally use them. Further, there is evidence that for some groups and for some devices/services, factors other than demographics appeared to be limiting access levels. The analysis below sets out the extent to which disabled consumers thought that their impairment either limited or prevented their use of each of these devices or services.

6.1 Key trends

- **A fifth of disabled consumers said their disability limited or prevented their use of any of the communication devices and services.** This was highest among visually-impaired consumers (32%) and those with hearing or a learning disability (each at 30%). Mobility- and multiple-impaired consumers (the older profile disability groups within our disabled sample), were less likely to consider their disability a factor which limited or prevented their use of devices and services (22% and 25% respectively).

- **Hearing-impaired consumers were the disability group most likely to say their disability limited their use of telecoms services (landline and any type of mobile phone).** Just under one in ten (7%) said they did not use a landline as its use was prevented, in part, by their disability. Use of a mobile phone was less affected, with 4% saying they did not use this device due to factors including their disability.

- **Consumers with a learning disability were the group most likely not to use a computing device and to say their disability limited/prevented this.** One in ten (11%) said they did not use a tablet, and that its use was prevented, in part, by their disability. Uses of PCs/laptops were affected by their disability to a lesser degree, with 5% saying they did not use these devices due to factors including their disability.

- **Around one in ten consumers in each disability group said they used a television, but that its use was limited by their disability.** In total, between 10%-14% of consumers in each disability group said their disability limited or prevented their use of a television set. A minority (up to 2%) of each disability group said they did not use a TV set due to factors including their disability.
6.2 Stated limitations, overview

A fifth of disabled consumers said their disability limited or prevented their use of any of the communication devices and services

A fifth (22%) of all disabled consumers said their disability either limited or prevented their use of any of the devices and services reported (Figure 27). This proportion was highest among visually-impaired consumers (32%) and those with a hearing or learning disability (each at 30%).

Mobility and multiple-impaired consumers, the older profile disability groups within our disabled sample, were less likely to consider their disability as a factor which limited or prevented their use of devices and services (22% and 25% respectively).

Figure 27 Proportion who said their disability either limited or prevented use of any communication devices and services, by type of disability

Source: British Population Survey, 1 August - 20 November 2014
○○= Statistically significant different at 95% confidence level versus all disabled (red = lower, green = higher)

6.2.1 Stated limitations on use of telecoms devices (landline and any type of mobile phone)

Hearing-impaired consumers were the group most likely to say their disability limited their use of telecoms services (landline and mobile)

Around a fifth (18%) of hearing-impaired consumers said their use of a landline was limited or prevented due to their disability (Figure 28). This equates to 7% of this disability group that did not use a landline, and said that their disability prevented use of this service. A further 11% personally used this service but said its use was limited by their disability.

A smaller proportion of hearing-impaired consumers said their use of a mobile phone (simple or smartphone) was prevented or limited by their disability (12%). This included 8% of this disability group who personally used a mobile but said its use was limited by their disability, and 4% who said they did not use one, due to their disability.

Visually-impaired consumers were comparable to hearing-impaired consumers in their responses regarding mobiles; 13% said their use of mobiles was limited or prevented by
their disability. Four per cent said they did not use them, at least partly because of their disability, and 9% said they used a mobile phone but its use was limited by their disability.

**Figure 28 Proportion of disabled consumers whose use of telecoms devices was limited or prevented by their disability**

<table>
<thead>
<tr>
<th></th>
<th>LANDLINE</th>
<th>MOBILE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% who feel their disability limits/prevents use of device/service</td>
<td>% who do not use device/service (but use is impacted by disability)</td>
</tr>
<tr>
<td>Mobility impaired</td>
<td>8% 5% 3%</td>
<td>8% 5% 3%</td>
</tr>
<tr>
<td>Hearing impaired</td>
<td>18% 11% 7%</td>
<td>12% 8% 4%</td>
</tr>
<tr>
<td>Visually impaired</td>
<td>6% 3% 3%</td>
<td>13% 9% 4%</td>
</tr>
<tr>
<td>Multiple impairments</td>
<td>12% 9% 3%</td>
<td>11% 8% 3%</td>
</tr>
<tr>
<td>Learning disability</td>
<td>9% 5% 4%</td>
<td>11% 8% 3%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014

### 6.2.2 Stated limitations on use of the internet and computing devices (PC/laptop and tablet) 19

Consumers with a learning disability were the group most likely to say they were prevented from using the internet at least partly due to their disability.

Around a fifth (18%) of consumers with a learning disability said their disability limited or prevented use of the internet (Figure 29). This compared to 13% of consumers with a visual impairment, 7% of the groups with the oldest age profiles (i.e. mobility and multiple disabilities) and 3% of those with a hearing impairment.

A similar trend was noted in relation to use of connected devices (PCs/laptop and tablets). The groups most likely to report that their disability was a factor that limited or prevented use of these devices were those with a learning disability and those with a visual impairment. Fifteen per cent of those with a learning disability and 14% of consumers with a visual impairment said their disability limited or prevented use of a PC/laptop.

The comparable figures for use of tablets were 13% and 11% among consumers with a learning disability or visual impairment. The data suggest that for these consumers, their disability is more likely to be a factor that prevents use altogether, than merely limits use. For example, 7% of consumers with a visual impairment said they did not use a tablet and that its use was prevented by their disability, compared to the 4% who said they used this device, but with limitations.

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19 Throughout this report we have linked connected devices (smartphones, PCs/laptops, tablets) to the internet section. However, for limitations on use, smartphones were grouped with mobile phones, so this is covered in the telecoms section.

20 Personal use of the internet was not specifically asked of respondents within the survey, although we did ask whether their use of the internet was limited or prevented by their disability. Therefore the table below demonstrates the proportions who felt their use was limited, but we cannot include analysis to show how many did not use the internet due to their disability.
Figure 29 Proportions of disabled consumers whose use of connected devices was limited or prevented by their disability

<table>
<thead>
<tr>
<th>Device</th>
<th>INTERNET</th>
<th>PC/LAPTOP</th>
<th>TABLET</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% who feel their disability limits/prevents use of device/service</td>
<td>% who feel their disability limits/prevents use of device/service</td>
<td>% who do not use device/service (use impacted by disability)</td>
</tr>
<tr>
<td>Mobility impaired</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Hearing impaired</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Visually impaired</td>
<td>13%</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>Multiple impairments</td>
<td>7%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Learning disability</td>
<td>18%</td>
<td>15%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014

6.2.3 Stated limitations to use of a television set

Around one in ten consumers in each disability group said that they used a television, but that its use was limited by their disability

In total, between 10% and 14% of consumers in each disability group said their disability limited or prevented their use of a television set (Figure 30). Most of these said that they currently used this device, and only a minority (up to 2%) of each disability group said they did not use a television set, due to factors including their disability.

Figure 30 Proportions of disabled consumers whose use of a TV was limited or prevented by their disability

<table>
<thead>
<tr>
<th>TV</th>
<th>% who feel their disability limits/prevents use of device/service</th>
<th>% who personally use device/service (but use is impacted by disability)</th>
<th>% who do not use device/service (use impacted by disability)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobility impaired</td>
<td>13%</td>
<td>12%</td>
<td>1%</td>
</tr>
<tr>
<td>Hearing impaired</td>
<td>11%</td>
<td>11%</td>
<td>0%</td>
</tr>
<tr>
<td>Visually impaired</td>
<td>14%</td>
<td>12%</td>
<td>2%</td>
</tr>
<tr>
<td>Multiple impairments</td>
<td>11%</td>
<td>10%</td>
<td>1%</td>
</tr>
<tr>
<td>Learning disability</td>
<td>10%</td>
<td>9%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014

21 Limitations to using a DAB radio were not included within the 2014 survey
Section 7

Consumers with mobility impairments

7.1 Introduction

In this section we look in more detail at consumers with mobility impairments only, including the impact of different types of impairment. We detail the devices and services that consumers have access to in the home, their use of them, and any limitations felt on using them. This section also provides more information on the impact of demographics and other factors. Consumers with mobility impairments (as defined below) accounted for a fifth (21%) of the total sample of disabled consumers in the survey.

The questions in the survey relating to this type of disability asked whether consumers could not walk at all, or used a wheelchair, whether they could not walk very far or manage stairs (or only with difficulty), and whether they had limited ability to reach.

7.2 Key trends

- **Six in ten mobility-impaired consumers had internet access (anywhere), compared to nine in ten non-disabled consumers.** Internet access had increased by 13pp (to 60%) since 2012 for this disability group, but remained lower than for non-disabled consumers (up 5pp to 88%). The older age profile of this disability group (over half were aged 65+) explains some of the difference in levels of access, as well as the lower levels of access to computing devices among this group.

- **Despite increases in access to computing devices among mobility-impaired consumers, access was less likely than for non-disabled consumers.** Access to a PC/laptop in the home rose by 7pp (to 59%) since 2012 for this disability group, and by 18pp (to 27%) for a tablet. However, access to both was less likely than for non-disabled consumers in 2014 (79% and 42% respectively). This was in part driven by lower access among the older mobility-impaired consumers and those in DE socio-economic group, reflective of the higher proportion in retirement.

- **Mobility-impaired consumers were half as likely as non-disabled consumers to have access to a smartphone.** Three in ten (31%) had access to a smartphone in the home, versus 66% of non-disabled consumers, with both groups increasing their access since 2012. A larger proportion had access to any type of mobile phone in the home (80%) – still less likely than non-disabled consumers (89%).

- **Mobility-impaired consumers were more likely than non-disabled consumers to have a free-to-air TV service, and less likely to have a pay-TV service.** Around two-fifths (43%) had access to a pay-TV (satellite/cable) service in the home, lower than for non-disabled consumers (55%). In contrast, access to a free-to-air (Freeview/ Freesat) TV service was higher for this group (60%) than for non-disabled consumers (50%), with levels decreasing for non-disabled consumers since 2012.

- **A fifth of mobility-impaired consumers said their disability limited their use of communication services and devices.** These consumers were less likely to say that their disability limited their use of computing devices or the internet (5%-7% stating this) compared to their use of other devices (8%-13%). Use of a TV was the most limited by consumers’ mobility disabilities (13%); although most said they used a TV, its use was limited by their disability.
7.3 Profile

Almost three-fifths of mobility-impaired consumers were aged 65+, compared to a fifth of non-disabled consumers

Mobility-impaired consumers had an older profile than non-disabled consumers, with 58% aged 65+, compared to 18% of non-disabled consumers (Figure 31). This was even more evident among consumers aged 75+; a third (32%) of mobility-impaired consumers were in this age group, compared to under one in ten (6%) non-disabled consumers.

Conversely, mobility-impaired consumers were less likely to have a younger profile than non-disabled consumers; less than one in ten (8%) were aged 15-34, compared to over a third (35%) of non-disabled consumers. A smaller proportion of this disability group were aged 35-54 (18%) compared to non-disabled consumers (32%).

When comparing the various mobility impairments by the total mobility-impaired sample, wheelchair users were the least likely to be aged 75+ (24% vs. 32%). Reflecting this, they were the most likely to have the youngest profile among this disability group; 21% were aged 15-34, compared to 8% of the total mobility-impaired sample.

Figure 31 Age profile of mobility-impaired consumers

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled = 15859, mobility-impaired = 845; wheelchair user = 116, other lower body = 583, upper body = 211, both lower and upper body = 65*
Caution: * indicative sample between 50 and 100

Mobility-impaired consumers were significantly more likely than non-disabled consumers to have an older and less affluent profile

Analysis of the combined socio-economic and age profiles indicate that mobility-impaired consumers aged over 35 were more likely than non-disabled consumers to be in socio-economic group DE (Figure 32).

The largest gap was seen among those aged 35-54 and in the DE group: over two-fifths (45%) of mobility-impaired consumers compared to a fifth (21%) of non-disabled consumers.

Mobility-impaired consumers aged 35-54 and 55-64 made up a lower proportion within the C1 group (22% for each), than C1 non-disabled consumers (33% and 32% respectively).
With the exception of those aged 55-64, mobility-impaired consumers were less likely than non-disabled consumers to be in the AB group.

**Figure 32 Combined age and SEG profile of mobility-impaired consumers**

![Diagram showing the age and SEG profile of mobility-impaired consumers compared to non-disabled consumers.](image)

*Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15-34 = 5518, 35-54 = 5065, 55-64 = 2402, 65-74 = 1885, 75+ = 970; mobility-impaired: 15-34 = 64*, 35-54 = 149, 55-64 = 139, 65-74 = 217, 75+ = 274
Caution: * indicative sample between 50 and 100

**Consistent with their older profile, mobility-impaired consumers were significantly more likely than non-disabled consumers to be retired**

Consistent with their older age profile, two-thirds (65%) of mobility-impaired consumers were in retirement, compared to a fifth (21%) of non-disabled consumers (Figure 33).

Consistent with their younger age profile, wheelchair users had the lowest proportion in retirement (53%) among this disability group.

Less than a fifth (18%) of mobility-impaired consumers were in employment, compared to over half the proportion of non-disabled consumers (56%). Wheelchair users were the most likely within this disability group to be in employment (28%), while those with another lower body impairment, and those with both upper and lower body impairments, were the least likely to be in employment (14% and 6% respectively).
Figure 33 Working status of mobility-impaired consumers

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15859, mobility: 845, wheelchair: 116, other lower body: 583, upper body: 211, both lower and upper body: 65*
Caution: * indicative sample between 50 and 100
○○= Statistically significant different at 95% confidence level mobility-impaired vs. non-disabled; mobility impairment splits vs. mobility-impaired (red = lower, green = higher)

Two-fifths of mobility-impaired consumers lived in a single-occupancy household, compared to less than a fifth of non-disabled consumers

Mobility-impaired consumers were more likely than non-disabled consumers to live alone, with two-fifths (40%) living in a single-occupancy household, compared to less than a fifth (16%) of non-disabled consumers (Figure 34).

A further two-fifths (38%) of mobility-impaired consumers were more likely to live in a household of two people, compared to a third (33%) of non-disabled consumers.

The higher proportions living in single- and dual-occupancy households may be attributable to the older age profile of this disability group.

While half (51%) of the population of non-disabled consumers lived in a larger household of three or more people, just over a fifth (22%) of mobility-impaired consumers did so. Wheelchair users were the most likely among this disability group to live in a household of this size (33%).
7.4 Access to devices and services, overview

Despite increases in some access levels, mobility-impaired consumers had lower levels of access to most devices and services than non-disabled consumers

Compared to non-disabled consumers, mobility-impaired consumers were more likely to have access to a landline in the home (79% vs. 72%) (Figure 35). Wheelchair users were the least likely in this disability group to have access (66%).

Access to any type of mobile phone was lower for mobility-impaired consumers than for non-disabled consumers (80% vs. 89%), and was comparable across each impairment split.

Access to a smartphone had increased since 2012 for both groups, but was lower for mobility-impaired consumers (up 10pp to 31%) than for non-disabled consumers (up 18pp to 66%) in 2014. Each impairment split had comparable levels of smartphone access, although consumers with a lower body impairment (non-wheelchair users) where the only impairment split within this disability to see an increase in access since 2012.

Mobility-impaired consumers’ access to computing devices and services had each increased since 2012. Internet access was up by 13pp (to 60%), driven by an increase in access among consumers with a lower-body impairment (non-wheelchair users). Access to a PC/laptop had risen by 7pp (to 59%), although no significant increases were seen within the impairment splits. Access to a tablet tripled (up by 18pp to 27%), driven by increases in each impairment split except for wheelchair users, who were the least likely to have access to a tablet (18%) among this disability group. Considering the younger profile of wheelchair users, this suggests that factors other than age impeded their access to a tablet. In contrast, consumers with an upper-body impairment were the most likely among this disability group to have access to a tablet (36%).

However, access to each of the above computing devices and the internet remained lower than for non-disabled consumers in 2014.
Potentially linked to the older age profile of this disability group, access levels to a games console were also lower than for non-disabled consumers (13% vs. 32%), with access comparable among the mobility impairment splits.

Mobility-impaired consumers were more likely than non-disabled consumers to have access to a free-to-air TV service (Freeview/Freesat), and less likely to have pay TV (satellite/cable). Again, access was comparable for each service among the mobility impairment splits.

Access to a DAB radio was up since 2012 by 7pp (to 24%) for this disability group, although it remained comparable to non-disabled consumers (26%) in 2014. The increase for this group overall was driven by increases among each impairment split, except wheelchair users, who had levels comparable to 2012. Consumers with an upper-body impairment were the most likely, among this disability group, to have access to a DAB radio (34%).

Figure 35 Access to devices and services, among mobility-impaired consumers

<table>
<thead>
<tr>
<th></th>
<th>Non-disabled</th>
<th>All disabled</th>
<th>Mobility Impaired</th>
<th>Wheelchair user</th>
<th>Other lower body impairment</th>
<th>Upper body impairment</th>
<th>Both lower and upper body impairment*</th>
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</thead>
<tbody>
<tr>
<td>Landline</td>
<td>72%</td>
<td>77%</td>
<td>79%</td>
<td>66%</td>
<td>82%</td>
<td>82%</td>
<td>85%</td>
</tr>
<tr>
<td>Any mobile</td>
<td>89%</td>
<td>65%</td>
<td>80%</td>
<td>78%</td>
<td>79%</td>
<td>84%</td>
<td>78%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>66%</td>
<td>41%</td>
<td>31%</td>
<td>30%</td>
<td>30%</td>
<td>36%</td>
<td>29%</td>
</tr>
<tr>
<td>PC/laptop</td>
<td>79%</td>
<td>64%</td>
<td>59%</td>
<td>57%</td>
<td>56%</td>
<td>64%</td>
<td>51%</td>
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<tr>
<td>Internet access</td>
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<td>30%</td>
<td>27%</td>
<td>18%</td>
<td>26%</td>
<td>36%</td>
<td>32%</td>
</tr>
<tr>
<td>Games console</td>
<td>32%</td>
<td>21%</td>
<td>13%</td>
<td>9%</td>
<td>15%</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td>Pay-TV</td>
<td>55%</td>
<td>48%</td>
<td>43%</td>
<td>45%</td>
<td>44%</td>
<td>43%</td>
<td>51%</td>
</tr>
<tr>
<td>Free-to-air TV</td>
<td>50%</td>
<td>66%</td>
<td>60%</td>
<td>58%</td>
<td>61%</td>
<td>60%</td>
<td>62%</td>
</tr>
<tr>
<td>DAB</td>
<td>26%</td>
<td>25%</td>
<td>24%</td>
<td>16%</td>
<td>23%</td>
<td>34%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859; all disabled: 4004; mobility-impaired: 845; wheelchair user: 116; other lower body: 583; upper body: 211; both upper and lower: 65*
Caution: * indicative sample between 50 and 100
OO = Statistically significant different at 95% confidence level mobility-impaired vs. non-disabled; mobility impairment splits vs. mobility-impaired (red = lower, green = higher)
↑↓ = Statistically significantly different at 95% confidence level, than 2012

7.4.1 Focus on internet access and connected devices (PCs/laptops, tablets and smartphones)

This section assesses in more detail mobility-impaired consumers’ access to the internet in general, where they access it, how often, and what they use it for. Internet access was based on access anywhere, i.e. both inside and outside the home, including use via mobile devices. This section also considers mobility-impaired consumers’ access levels to connected devices in the home, i.e. PCs/laptops, tablets and smartphones, and compares access by age and socio-economic group.

Despite an increase in access to the internet, mobility-impaired consumers remained less likely than non-disabled consumers to have internet access anywhere

Access to the internet both inside and outside the home, for mobility-impaired consumers, increased by 13pp since 2012 (to 60%) although this remained lower than the proportion of
non-disabled consumers (up by 5pp to 88%) (Figure 36). These lower levels may have been influenced by the older profile of mobility-impaired consumers, with over half (58%) aged 65+. Another factor may be the lower levels of access to computing devices, and the reported impact of disability upon use of such devices (Figure 50).

The younger mobility-impaired consumers aged 15-34 had levels of access comparable to non-disabled consumers, whereas those aged 35+ had lower access levels across each age group. The biggest gap was seen in those aged 65-74 (55% vs. 71%). As with non-disabled consumers, internet access levels declined with age, reducing to 34% of mobility-impaired consumers aged 75+.

Within socio-economic groups, mobility-impaired consumers within each group had lower levels of access than non-disabled consumers in the same group. The largest gap was seen among DE consumers, with less than half (44%) of mobility-impaired consumers having access, compared to over three-quarters (78%) of non-disabled DE consumers. The gaps reduced across the socio-economic groups, with those in AB group seeing a 9pp gap (86% vs. 95%), and higher levels of access.

**Figure 36** Internet access (anywhere) among mobility-impaired consumers, by age and SEG

Despite an increase in access, mobility-impaired consumers remained less likely than non-disabled consumers to have access to a PC/laptop in the home.

Access to a PC/laptop in the home had increased for mobility-impaired consumers by 7pp (to 59%) since 2012, although it remained lower than the proportion of non-disabled consumers in 2014 (79%) (Figure 37). This was despite non-disabled consumers seeing no change in access levels since 2012.

Mobility-impaired consumers aged 65+ were less likely than non-disabled consumers of the same age to have access to a PC/laptop. Those aged 65-74 had the biggest gap among the older age range, with three-fifths (59%) of mobility-impaired consumers having access.
compared to almost three-quarters (72%) of non-disabled consumers. For both mobility-impaired and non-disabled consumers, those aged 75+ had the lowest levels of access, at 36% and 44% respectively.

Access to a PC/laptop was also lower for mobility-impaired consumers aged 35-54; within this age group 71% of mobility-impaired consumers had access, compared to 85% of non-disabled consumers.

Within socio-economic groups, AB mobility-impaired consumers had comparable levels of access to AB non-disabled consumers. However, mobility-impaired consumers in groups C1, C2 and DE were each less likely than non-disabled people in the same groups to have access to a PC/laptop, although access declined in line with socio-economic status. Those in group DE had the biggest gap, with just over four in ten (43%) mobility-impaired DE consumers having access, compared to almost seven in ten (67%) non-disabled DE consumers.

**Figure 37** PC/laptop access in the home, among mobility-impaired consumers, age and SEG

Access to a tablet computer in the home increased three-fold for mobility-impaired consumers, although remained lower than non-disabled consumers

Although tablet access among mobility-impaired consumers was below that of non-disabled consumers (42%), access since 2012 had tripled for this disability group, up from 9% to 27% (Figure 38).

As with PCs/laptops, those with a mobility impairment aged 35-54 had lower access than non-disabled consumers of the same age (43% vs 51%). All other age groups had comparable levels of access.
Again, as with the PC/laptop, socio-economic status was a factor in levels of access to a tablet in the home. Consumers in AB group had the highest levels of access (50%), and were comparable to non-disabled consumers in this group (57%). However, mobility-impaired consumers in groups C1, C2 and DE were each less likely than non-disabled people in the same groups to have access, with access declining along with socio-economic status. Those in C2 group had the largest gap; just under a fifth (18%) of mobility-impaired consumers had access, compared to almost two-fifths (37%) of non-disabled C2 consumers.

**Figure 38** Tablet access in the home among mobility-impaired consumers, by age and SEG

![Graph showing tablet access by age and socio-economic group for non-disabled and mobility-impaired consumers](image)

**Source:** British Population Survey, 1 August - 20 November 2014  
**Base:** non-disabled: 15,859; 15-34 = 5518, 35-54 = 5065, 55-64 = 2402, 65-74 = 1885, 75+ = 970, AB = 3407, C1 = 5199, C2 = 3386, DE = 3867;  
**mobility-impaired:** 845, 15-34 = 64*, 35-54 = 149, 55-64 = 139, 65-74 = 217, 75+ = 274, AB = 136, C1 = 220, C2 = 169, DE = 320  
**Caution:** * indicative sample between 50 and 100  
○○ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

**Despite a rise in smartphone ownership, access levels remained lower among mobility-impaired consumers than among non-disabled consumers**

Although access to a smartphone in the home had increased since 2012 for mobility-impaired consumers (up by 10pp to 31%), this did not match the level of increase seen by non-disabled consumers in this period (up 18pp to 66%) (Figure 39).

With the exception of 55-64 year olds, levels of access were lower across all age groups for mobility-impaired consumers compared to non-disabled in the same age groups. Access levels decreased with age for both groups, with just over one in ten (13%) non-disabled consumers aged 75+ accessing a smartphone, compared to less than one in ten (6%) mobility-impaired consumers of the same age. Those aged 35-54 had the biggest gap, with over half (56%) of mobility-impaired consumers in this age group having access, compared to three-quarters (75%) of non-disabled consumers of the same age. This suggests that age may not play a factor in the accessibility of this device for this disability group.

Within socio-economic groupings, mobility-impaired consumers within each group had lower access than non-disabled consumers in the same group. The largest gap was among C2 consumers (26% vs. 65%). As with access to the other connected devices, those in the AB group had the highest levels of access (43% vs. 68%).
Increased access to a smartphone at home has led to increased mobile internet access for mobility-impaired consumers

Accessing the internet at home was comparable between non-disabled and mobility-impaired consumers, with a majority in each group accessing it at home (93% vs. 95%).

Despite the proportion of consumers with a mobility impairment accessing the internet via a mobile phone having risen by 14pp since 2012, it remained lower than mobile access among non-disabled consumers (31% vs. 59%) (Figure 40). Both groups’ increased access will have been influenced by their increased levels of access to a smartphone.

Less than a fifth (15%) of mobility-impaired consumers accessed the internet elsewhere, such as at work, place of study, or a public place (such as an internet café or library), compared with almost two-fifths (38%) of non-disabled consumers.

Access via each platform was comparable across the mobility impairment splits.
Figure 40 Internet access among mobility-impaired consumers, by location

Source: British Population Survey, 1 August - 20 November 2014
Base: consumers with internet access: non-disabled: 13,915, mobility: 508, wheelchair: 70*, other lower body: 330, upper body: 142, both lower and upper body: 34**
Caution: * indicative sample between 50 and 100, ** sample below 50 therefore not reported

Three-fifths of mobility-impaired consumers accessed the internet several times a day, compared to almost four-fifths of non-disabled consumers

Six in ten (59%) mobility-impaired consumers accessed the internet (at home or elsewhere) several times a day - lower than the proportion of non-disabled consumers (76%) (Figure 41). This was despite this disability group having a level of increase in frequency of access similar to non-disabled consumers: mobility-impaired consumers increasing by 11pp, and non-disabled consumers by 10pp.

Conversely, despite a decline of 4pp since 2012, daily access was higher for mobility-impaired consumers, with a fifth (19%) accessing the internet around once a day, compared to over one in ten (14%) non-disabled consumers.

Less frequent access, from twice a week to less than once a month, was also more likely among mobility-impaired consumers than among non-disabled consumers, with less than one in ten in each group doing this.
Mobility-impaired consumers were as likely as non-disabled consumers to use the internet for communications, but significantly less for other activities

Mobility-impaired consumers had similar levels of communication activity on the internet as non-disabled consumers (96% vs. 95%), also reflected in each type of mobility impairment (Figure 42). This disability group had increased this activity by 4pp since 2012, but were less likely to use the internet for all the other activities reported.

A majority of mobility-impaired consumers used the internet for accessing information (84%), lower than the proportion of non-disabled consumers (88%). Wheelchair users were the only mobility-impaired group to have lower levels of this activity (71%) than the overall mobility-impaired average (84%).

Online shopping had increased by 5pp (to 64%) since 2012 for mobility-impaired consumers overall, but remained lower than the proportion among non-disabled consumers in 2014 (71%). This activity had comparable levels among the mobility impairment splits.

Using the internet for audio-visual content had also increased since 2012 for mobility-impaired consumers (up 7pp to 32%), and also remained lower than the proportion among non-disabled consumers in 2014 (49%). Among this disability group, consumers with an upper body impairment were the most likely to use the internet for this activity (43%).

Gaming was the least popular use of the internet for both mobility-impaired (16%) and non-disabled consumers (21%), as with the other disability groups reported. Use of the internet for this activity was comparable among the mobility impairment splits.

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22 Consumers with both lower- and upper-body impairments achieved a sample of 34 respondents with internet access within the survey, therefore are too low a sample to analyse
7.4.2 Focus on telecoms access (landline and any type of mobile phone)

This section assesses in more detail mobility-impaired consumers’ access to landline and any mobile phones in the home, and compares access by age and socio-economic group. ‘Any’ mobile phones within the survey include both simple and smartphones; although a focus on smartphones is included in sub-section 7.4.1 (Internet and connected devices).

Eight in ten mobility-impaired consumers had access to a landline in the home, significantly more than the proportion of non-disabled consumers

Perhaps as a reflection of their older profile, eight in ten (79%) mobility-impaired consumers had access to a landline in the home, compared to just over seven in ten (72%) non-disabled consumers (Figure 43). Neither group’s access levels had changed since 2012.

Mobility impaired consumers aged 35-54 were the only age group to see lower levels of access to their non-disabled counterparts. As with non-disabled consumers, access to a landline increased with age.

Within socio-economic group, AB consumers had levels of access similar to non-disabled consumers. However, mobility-impaired consumers in groups C1, C2 and DE were each more likely than non-disabled consumers in the same groups to have access. Consumers in DE group had the biggest difference; almost eight in ten (76%) had access, compared to six in ten (61%) non-disabled consumers.
**Figure 43  Landline access at home among mobility-impaired consumers, by age and SEG**

![Bar chart showing landline access at home among mobility-impaired consumers, by age and SEG.](chart.png)

Source: British Population Survey, 1 August - 20 November 2014

Base: non-disabled: 15,859; 15-34 = 5518, 35-64 = 2402, 65-74 = 1885, 75+ = 970, AB = 3407, C1 = 5199, C2 = 3386, DE = 3867;
mobility-impaired: 845, 15-34 = 64*, 35-64 = 149, 55-64 = 139, 65-74 = 217, 75+ = 274, AB = 136, C1 = 220, C2 = 169, DE = 320

Caution: * indicative sample between 50 and 100

- **Non-disabled**
- **Mobility impaired**

Older and less affluent mobility-impaired consumers were less likely than non-disabled consumers with the same profile to have access to any mobile phone in the home

Although a majority of mobility-impaired consumers had access to a mobile phone (simple or smartphone) in the home (80%), this was lower than the proportion of non-disabled consumers (89%) (Figure 44).

The rise in access to a smartphone at home did not affect overall mobile ownership levels significantly, and mobility-impaired consumers’ access levels were unchanged since 2012. This is in contrast to non-disabled consumers and the average for all disabled consumers, both of which had increased access to this device.

Lower levels of access were seen among the older age groups (65+), with 81% of mobility-impaired consumers aged 65-74 having a mobile phone (vs. 86% of non-disabled) and 66% of those aged 75+ having one (vs. 72% of non-disabled).

By socio-economic group, AB consumers had comparable levels of access. But mobility-impaired consumers in groups C1, C2 and DE were each less likely than non-disabled consumers in the same groups to have access to a mobile phone.
Figure 44 Mobile phone access (any type) at home among mobility-impaired consumers, by age and SEG

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,659; 15-34 = 5518, 35-54 = 5065, 55-64 = 2402, 65-74 = 1885, 75+ = 970, AB = 3407, C1 = 5199, C2 = 3386, DE = 3867; mobility-impaired: 845, 15-34 = 64*, 35-54 = 149, 55-64 = 139, 65-74 = 217, 75+ = 274, AB = 136, C1 = 220, C2 = 169, DE = 320
Caution: * indicative sample between 50 and 100
○○ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

7.4.3 Focus on broadcast access (TV and radio)

This section assesses in more detail mobility-impaired consumers’ access to pay-TV services (satellite/cable), free-to-air TV services (Freeview/Freesat), and a DAB radio in the home, comparing access levels by age and socio-economic group.

Mobility-impaired consumers were less likely than non-disabled consumers to have a pay-TV service in the home, with no change in access for either group

Access to a pay-TV (satellite/cable) service in the home remained lower for mobility-impaired consumers (43%) than for non-disabled consumers (55%), with neither group seeing a change in levels of access since 2012 (Figure 45).

These lower levels of access were not due to age, as each age group was comparable with non-disabled consumers in the same group.

However, lower levels were seen in socio-economic groups AB (46% vs. 57%), C2 (40% vs. 57%) and DE (38% vs. 51%). The lower levels in these groups might be attributed to the older profile, and the lower proportion of mobility-impaired consumers in employment, compared to non-disabled consumers.
Figure 45 Pay TV access at home among mobility-impaired consumers, by age and SEG

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859; 15-34 = 5518, 35-54 = 5065, 55-64 = 2402, 65-74 = 1885, 75+ = 970, AB = 3407, C1 = 5199, C2 = 3386, DE = 3867;
mobility-impaired: 845, 15-34 = 64*, 35-54 = 149, 55-64 = 139, 65-74 = 217, 75+ = 274, AB = 136, C1 = 220, C2 = 169, DE = 320
Caution: * indicative sample between 50 and 100
○○ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

Six in ten mobility-impaired consumers had access to a free-to-air TV service in the home, significantly higher than the proportion of non-disabled consumers

Unlike pay TV, access to a free-to-air (Freeview/Freesat) TV service in the home was more likely for those with a mobility impairment than for non-disabled consumers (60% vs. 50%), although neither saw a change in access levels since 2012 (Figure 46).

Levels of access were comparable across all age groups, but there were differences between socio-economic groups. In contrast to pay TV, where access levels were lower among mobility-impaired consumers in the AB, C2 and DE groups, consumers in these groups were more likely than non-disabled consumers with the same profile to have access to a free-to-air TV service. The biggest gap was among DE consumers (61% vs. 47%)
A quarter of mobility-impaired consumers had access to a DAB radio in the home, comparable to non-disabled consumers

Unlike non-disabled consumers, who had no change in access to a DAB radio in the home since 2012 (26%), mobility-impaired consumers had an increase of 7pp (to 24%). This contributed to this disability group having comparable levels of access as non-disabled consumers in 2014 (Figure 47).

Lower access levels were seen among mobility-impaired consumers aged 35-54 (21% vs. 30%) and those aged 65-74 (29% vs. 36%), compared to non-disabled consumers.

There were no differences in levels of DAB access by socio-economic group.
7.5 Personal use of devices and services

This is a new section in the report, and focuses on personal use of communication devices and services among mobility-impaired consumers.

Mobility-impaired consumers had significantly lower levels of personal use compared to access levels, of telecoms devices and free-to-air TV services

As with each disability group, the proportion of mobility-impaired consumers who personally used a device\textsuperscript{23} or service was lower than the proportion who had access to that device/service in the home\textsuperscript{24} (Figure 48).

Levels of personal use of a landline and any mobile phone were lower than levels of access to these devices for mobility-impaired consumers. The mobile phone showed the largest gap between use and access, with a 14pp difference (66% vs. 80%), while the difference between use of, and access to, a landline was 9pp (70% vs. 79%). As mobility-impaired consumers had higher levels of access than non-disabled consumers to a landline (72%), these lower levels of personal use may be due in part to their disability.

Personal uses of free-to-air TV services were also lower than levels of access to these services for mobility-impaired consumers. Freeview service use showed a gap of 7pp (50% vs. 57%) and Freesat use saw a gap of 2pp (3% vs. 5%), although take-up of free-to-air TV was generally lower across all consumers. As with a landline, mobility-impaired consumers were more likely than non-disabled consumers to have access to a free-to-air TV service

\textsuperscript{23} For the purposes of comparing access to personal use, PC/laptop as a device was excluded and TV was split by platform to reflect the structure of the survey.

\textsuperscript{24} Non-disabled consumers were not asked about their personal use of devices and services within the survey, therefore comparison cannot be made between these and disabled consumers.
(60% vs. 50%) which suggests that their disability may have played a part in their low level of personal use of this service.

Use of a tablet was at a lower level than access to this device for mobility-impaired consumers (21% vs. 27%). However, their use of the internet was similar to their access levels, suggesting that the tablet as a device (rather than as an internet service) may have been a factor in impeding use, perhaps influenced by their disability.

**Figure 48 Personal use of devices among mobility-impaired consumers**

* Personal use of the internet is defined by those who use the internet at least once a month; other devices and services were specifically asked about if the respondent personally used them.

Source: British Population Survey, 1 August - 20 November 2014

Base: mobility-impaired: 845

Notes whether personal use levels of each device/service for mobility-impaired consumers was statistically significantly lower than access levels of that device/service

**Mobility-impaired consumers had lower levels of personal use of any types of mobile phones and cable TV than the average for all disabled consumers**

When compared to the average for all disabled consumers, mobility-impaired consumers were less likely to personally use a cable TV service (10% vs. 14%), although satellite TV had comparable levels of use (Figure 49).

Use of any type of mobile phone (66%) was also lower than the average for disabled consumers (72%), although it was comparable to consumers with multiple impairments (67%).
Figure 49 Personal use of devices and services, by disability type

<table>
<thead>
<tr>
<th></th>
<th>ALL DISABLED</th>
<th>Mobility</th>
<th>Hearing</th>
<th>Visual</th>
<th>Multiple</th>
<th>Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landline</td>
<td>66%</td>
<td>70%</td>
<td>72%</td>
<td>63%</td>
<td>74%</td>
<td>53%</td>
</tr>
<tr>
<td>Any mobile (incl. smartphone)</td>
<td>72%</td>
<td>68%</td>
<td>73%</td>
<td>68%</td>
<td>67%</td>
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<td>Freesat</td>
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<td>3%</td>
<td>6%</td>
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<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

* Personal use of the internet is defined by those who use the internet at least once a month; other devices and services were specifically asked about if the respondent personally used them

Source: British Population Survey, 1 August - 20 November 2014
○○ = Statistically significantly higher or lower, at 95% confidence level, than all-disabled (red = lower, green = higher)

7.6 Stated limitations on use of devices/services due to disability

This is a new section in the report, intended to help us understand further whether lower access levels, or use of communication devices and services, were limited by consumers' disabilities. To inform this analysis, the survey asked whether disabled consumers considered this to be the case.

Mobility-impaired consumers said their disability limited or prevented their use of a TV, more than the other devices and services reported

Overall, just over a fifth (22%) of mobility-impaired consumers said that their disability limited or prevented their use of any of the devices and services, comparable to the average for all disabled consumers, and lower than the other disability groups reported.

Mobility-impaired consumers stated that their use of a tablet computer was the activity least limited by their disability (5%) (Figure 50). Two per cent said they used a tablet, but their use was limited by their disability. A further 3% of non-tablet users said they did not use a tablet, at least in part due to their disability. This disability group had comparable levels of access to a tablet as non-disabled consumers across most age groups, which implies that age was not a factor in non-use of this device.

Almost one in ten (8%) mobility-impaired consumers said their disability limited or prevented their use of either a landline or a mobile phone. For both devices, 5% said they used them, although their use was limited by their disability, and 3% of non-telecoms device owners said they did not use either device, and that their disability was a factor in this.

Use of either a PC/laptop or the internet revealed the same proportion of mobility-impaired consumers who said their use was limited or prevented (7%) by their disability. However, this total sample of 7% said they used a PC/laptop, despite their disability limiting its use; consequently, none of the mobility-impaired sample said they did not use these devices due to their disability.

Mobility-impaired consumers reported that the TV was the device whose use was the most limited by their disability (13%). Despite this, 12% said they used it, even though their
disability limited their use. Therefore, a minority (1%) said they did not use a TV partly due to their disability.

For each of the devices and services reported on, wheelchair users reported their disability as having the least impact on use within this disability group, whereas consumers with another lower-body impairment reported their disability having the most impact on their use of each device or service.

**Figure 50 Mobility-impaired consumers, impact of disability on use of devices**

<table>
<thead>
<tr>
<th>Device</th>
<th>% who feel their disability limits/ prevents use of device/service</th>
<th>% who personally use device/service (but use is impacted by disability)</th>
<th>% who do not use device/service (use impacted by disability)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landline</td>
<td>8%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Mobile</td>
<td>8%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Internet*</td>
<td>7%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>PC/laptop</td>
<td>7%</td>
<td>7%</td>
<td>0%</td>
</tr>
<tr>
<td>Tablet</td>
<td>5%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>TV</td>
<td>13%</td>
<td>12%</td>
<td>1%</td>
</tr>
</tbody>
</table>

*Personal use of the internet is defined by those who use the internet at least once a month; other devices and services were specifically asked about if the respondent personally used them.
Section 8

Consumers with hearing impairments

8.1 Introduction

This section assesses in more detail the position of consumers with hearing impairments only. It details the services and devices that they have access to in the home, their use of them, and any limitations felt on using them. It also provides more information on the impact of demographics and other factors. Consumers with hearing impairments (only) accounted for one in ten (11%) of the sample of disabled consumers.

The questions in the survey relating to this type of disability asked whether consumers had poor or partial hearing, or were deaf: 86% had partial hearing, and 14% were deaf.25

8.2 Key trends

- **Access to the internet (anywhere) was unchanged since 2012 for hearing-impaired consumers, and was significantly lower than for non-disabled consumers.** Over two-thirds (69%) of hearing-impaired consumers had access to the internet, at home or elsewhere; lower than the proportion of non-disabled consumers (88%). Access was lower among the younger age group of 15-34s (91% vs. 97%), but comparable among the other age groups.

- **Hearing-impaired consumers were significantly more likely than non-disabled consumers to have access to a landline at home.** Around eight in ten (83%) had access to a landline (comparable to 2012), compared to around seven in ten (72%) non-disabled consumers (a decrease since 2012). These higher levels of access were driven by the older age groups (65+) and noted among most of the socio-economic groups.

- **Access to smartphones and computing devices was significantly lower for hearing-impaired consumers than for non-disabled consumers.** Access levels to smartphones (46%), PCs/laptops (71%) and tablet computers (32%) had each increased for hearing-impaired consumers since 2012, but remained lower than the proportion of non-disabled consumers in 2014 (66%, 79% and 42% respectively).

- **Consumers with hearing impairments were more likely than non-disabled consumers to have a free-to-air TV service, and less likely to have pay TV.** Around half (48%) had access to a pay-TV service in the home, lower than the proportion of non-disabled consumers (55%). In contrast, access to a free-to-air TV service was higher for this group (61%) than for non-disabled consumers (50%), with levels decreasing for non-disabled consumers since 2012.

- **Three in ten hearing-impaired consumers said their disability limited or prevented their use of communication services and devices.** These consumers were less likely to say their disability limited their use of a computing device or the internet (3%-4% stating this) compared to their use of other devices (11%-18%). Use of a landline was the most limited by a consumer’s hearing disability, with 7% saying they did not use a landline as factors including their disability prevented this.

25 A lower sample of 66 was achieved for those who reported they were deaf, therefore any analysis on this sample should be treated with caution.
8.3 Profile

Over half of hearing-impaired consumers were over 65, compared to a fifth of non-disabled consumers

Consumers with a hearing impairment had an older profile than non-disabled consumers; over half (54%) were aged 65+, compared to a fifth (18%) of non-disabled consumers (Figure 51). This age gap was even more evident among consumers aged 75+; 27% of hearing-impaired consumers were in this age group, compared to 6% of non-disabled consumers.

Among the younger age groups, those with hearing impairments were less likely than non-disabled consumers to be aged 15–34 (12% vs. 35%) or 35–54 (15% vs. 32%).

Within the hearing impairment splits, deaf consumers were more likely to be aged 35–54 (26%) than those with partial hearing (13%), suggesting that their condition was a disability rather than a deterioration of their hearing, as it would be for older consumers. All other age ranges had broadly comparable levels of severity of hearing loss.

Figure 51 Age profile of hearing-impaired consumers

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled = 15859, hearing-impaired = 457; Deaf = 66*, Partial hearing = 391
Caution: * indicative sample between 50 and 100
○○ = Statistically significantly different at 95% confidence level hearing impairment vs. non-disabled, deaf vs. partial hearing (red = lower, green = higher)

Hearing-impaired consumers were significantly more likely to have a less affluent, but younger, profile than non-disabled consumers

The combined age and socio-economic group profiles of consumers with a hearing impairment were broadly comparable to those of non-disabled consumers, apart from two key groups (Figure 52).

Hearing-impaired consumers aged 15-34 were more likely than non-disabled consumers to be in socio-economic group C2 (35% vs 22%). Likewise, hearing-impaired consumers aged 35-54 were more likely than non-disabled of the same age group to be in socio-economic group DE (32% vs 21%).
Three-fifths of hearing-impaired consumers were retired, compared to a fifth of non-disabled consumers

Consistent with the older age profile, three-fifths (58%) of consumers with a hearing impairment were in retirement (Figure 53). This compares to a fifth (21%) of non-disabled consumers.

Conversely, hearing-impaired consumers were less likely than non-disabled consumers to be in employment (31% vs. 56%). This was also the case for hearing-impaired consumers with ‘other’ forms of working status (10%), such as full-time education, unemployment, or home-makers, compared to 22% of non-disabled consumers.

Within severity of impairment splits, a larger proportion of consumers with partial hearing rather than completely deaf (60% vs. 44%) were retired. This correlates with the older profile of hearing-impaired people, and the likelihood that hearing deteriorates with age, rather than being defined as a disability.
Hearing-impaired consumers were significantly more likely than non-disabled consumers to live alone or in a smaller household

Reflecting the older profile of hearing-impaired consumers, this disability group were more likely than non-disabled consumers either to live alone (29% vs. 16%) or in a dual-occupancy household (44% vs. 33%) (Figure 54).

These findings are mirrored in the proportion of hearing-impaired consumers who lived in a larger household (with three or more people): a quarter (26%) did so, compared to half (51%) of non-disabled consumers.

When comparing degrees of severity of hearing impairments, those with partial hearing were less likely than deaf consumers to live in a larger household (three or more people) (24% vs. 38%), which is consistent with the older profile of this group.
8.4 Access to devices and services: overview

Despite increases in access to smartphones and computing devices, hearing-impaired consumers had lower access than non-disabled consumers to these and other devices

Hearing-impaired consumers were more likely than non-disabled consumers to have access to a landline in the home (83% vs. 72%) in 2014 (Figure 55). This is a reflection of their older age profile, although there was no change in access levels since 2012, whereas non-disabled consumers’ access declined by 2pp.

Levels of access to any type of mobile phone (simple or smartphone) or specifically a smartphone in the home continued to be lower for those with a hearing impairment than for non-disabled consumers. Non-disabled consumers’ access to any type of mobile phone had increased since 2012 by 2pp (to 89%), while hearing-impaired consumers’ access remained static at 86%. This group’s level of access to a smartphone increased by the same amount as among non-disabled consumers (by 18pp), although access for hearing-impaired consumers (46%) remained lower than for non-disabled consumers (66%) in 2014.

Hearing-impaired consumers’ access increased for both PCs/laptops (up 8pp to 71%) and tablet computers (up 22pp to 32%) in the home, although their access remained lower than that of non-disabled consumers in 2014 (at 79% and 42% respectively). Their increase in access to a tablet was similar to that of non-disabled consumers (25pp), suggesting that disability was not a factor in their access to this device.

Access to the internet was unchanged since 2012 for hearing-impaired consumers, although non-disabled consumers’ access was up by 5pp. Consequently, hearing-impaired consumers continued to have lower levels of access than non-disabled consumers in 2014 (69% vs. 88%). As with the internet, access to a games console did not increase for this disability group, but neither did it increase for non-disabled consumers, so hearing-impaired
consumers again had lower levels of access than non-disabled consumers (19% vs. 32%). This could be linked to the older age profile of this disability group.

Among broadcast devices and services, consumers with a hearing impairment were more likely than non-disabled consumers to have access to a free-to-air TV service (Freeview/Freesat) in the home (61% vs. 50%); driven by non-disabled consumers’ decline in access since 2012. But access to a pay-TV service (satellite/cable) in the home was lower for hearing-impaired consumers (48%) than for non-disabled consumers (55%), although neither level had changed since 2012.

Hearing-impaired consumers had comparable levels of access to a DAB radio in the home (30%) as non-disabled consumers (26%), with neither figure changing since 2012. Within impairment split, those with partial hearing were twice as likely to have access to this device (32%) than deaf consumers (15%).

**Figure 55 Access to devices and services among hearing-impaired consumers**

<table>
<thead>
<tr>
<th></th>
<th>Non-disabled</th>
<th>All disabled</th>
<th>Hearing impaired</th>
<th>Deaf*</th>
<th>Partial hearing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landline</td>
<td>72%</td>
<td>77%</td>
<td>83%</td>
<td>83%</td>
<td>83%</td>
</tr>
<tr>
<td>Any mobile</td>
<td>89%</td>
<td>85%</td>
<td>86%</td>
<td>83%</td>
<td>86%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>66%</td>
<td>41%</td>
<td>46%</td>
<td>39%</td>
<td>47%</td>
</tr>
<tr>
<td>PC/laptop</td>
<td>79%</td>
<td>64%</td>
<td>71%</td>
<td>68%</td>
<td>71%</td>
</tr>
<tr>
<td>Internet access</td>
<td>88%</td>
<td>65%</td>
<td>69%</td>
<td>71%</td>
<td>69%</td>
</tr>
<tr>
<td>Tablet</td>
<td>42%</td>
<td>30%</td>
<td>32%</td>
<td>27%</td>
<td>33%</td>
</tr>
<tr>
<td>Games console</td>
<td>32%</td>
<td>21%</td>
<td>19%</td>
<td>18%</td>
<td>19%</td>
</tr>
<tr>
<td>Pay-TV</td>
<td>55%</td>
<td>48%</td>
<td>46%</td>
<td>47%</td>
<td>49%</td>
</tr>
<tr>
<td>Free-to-air TV</td>
<td>50%</td>
<td>66%</td>
<td>61%</td>
<td>61%</td>
<td>61%</td>
</tr>
<tr>
<td>DAB</td>
<td>26%</td>
<td>25%</td>
<td>30%</td>
<td>15%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014
Caution: * indicative sample between 50 and 100
○○= Statistically significantly different at 95% confidence level hearing impairment vs. non-disabled, deaf vs. partial hearing (red = lower, green = higher)
↑↓ = Statistically significantly different at 95% confidence level, than 2012

**8.4.1 Focus on internet access and connected devices (PCs/laptops, tablets and smartphones)**

This section assesses in more detail hearing-impaired consumers’ access to the internet in general, where they access it, how often, and what they use it for. Internet access was based on access anywhere, i.e. both inside and outside the home including use via mobile devices. We also look at hearing-impaired consumers’ levels of access to connected devices in the home, i.e. PCs/laptops, tablets and smartphones, and compare access by age and socio-economic group.
Seven in ten hearing-impaired consumers had access to the internet (anywhere), compared to nine in ten non-disabled consumers

Although just over two-thirds (69%) of hearing-impaired consumers had internet access either at home or elsewhere, this was lower than the proportion of non-disabled consumers (88%) (Figure 56). This will partly be because non-disabled consumers’ access had increased since 2012 (by 5pp), while hearing-impaired consumers’ access had not. This difference in the 2014 results was observed between hearing-impaired and non-disabled consumers across all socio-economic groups and among 15-34 year olds.

A majority of younger (15-34) hearing-impaired consumers had access to the internet (91%), although this continued to be lower than the proportion of non-disabled consumers of the same age (97%). All other age groups had comparable levels of access, with access declining with age across both hearing-impaired and non-disabled consumers. The oldest age group (75+) had the lowest levels of internet access, at two-fifths (40%), comparable to non-disabled consumers of this age (42%).

Hearing-impaired consumers in each socio-economic group had lower access than non-disabled consumers in the same group. The largest gap was among DE consumers; half (50%) of hearing-impaired DE consumers had access, compared to three-quarters (76%) of non-disabled DE consumers. As hearing-impaired consumers had a larger proportion in retirement (58%) compared to non-disabled consumers (21%), this suggests that their disability may have been a factor in their lower levels of internet access.

By hearing impairment split, there were comparable levels of internet access between consumers with partial hearing and deaf consumers.
Figure 56  Internet access (anywhere) among hearing-impaired consumers, by age and SEG

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859; hearing-impaired: 457; non-disabled: 15-34 = 5518, 35-54 = 5065, 55-64 = 2402, 65-74 = 1885, 75+ = 970; hearing-impaired: 15-34 = 54*, 35-54 = 68*, 55-64 = 84*, 65-74 = 125, 75+ = 124; non-disabled: AB = 3407, C1 = 5199, C2 = 3386, DE = 3867; hearing-impaired: AB = 97*, C1 = 128, C2 = 107, DE = 125
Caution: * indicative sample between 50 and 100
○ O = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

Seven in ten hearing-impaired consumers had access to a PC/laptop, compared to eight in ten non-disabled consumers

Although there was a significant difference between access levels at the total level between hearing-impaired and non-disabled consumers (71% vs 79%), PC/laptop access levels were comparable between the two groups, for each age group (Figure 57). The lower access for hearing-impaired consumers overall was despite an increase of 8pp since 2012 for this disability group, while non-disabled consumers saw no change.

The only difference in access was in the DE socio-economic group. Here, half (52%) of hearing-impaired consumers had access to a PC/laptop, compared to two-thirds (67%) of non-disabled consumers. As with internet access, as this disability group had a larger proportion in the DE group than did non-disabled consumers, the lower levels of PC/laptop access may be linked to their disability.

By hearing impairment split, access levels were comparable between consumers with partial hearing and deaf consumers.
Hearing-impaired consumers had a similar increase in access to a tablet as non-disabled consumers, but remained lower overall

Overall, access to a tablet was lower for those with a hearing impairment (32%) than for non-disabled consumers (42%), although both had similar levels of increase since 2012 (Figure 58). Hearing-impaired consumers’ access was up by 22pp, while non-disabled consumers had an increase of 25pp.

There was lower access among the 35-54 age group; around four in ten (38%) hearing-impaired consumers had access, compared to five in ten (51%) non-disabled consumers. All other age groups had access comparable to non-disabled consumers in the same age groups. This implies that the older age profile of this disability group did not affect their levels of access, suggesting that disability was a factor in the lower levels of access.

Within socio-economic status, differences were seen among both AB and DE consumers. AB consumers had the largest gap, with around four in ten (42%) hearing-impaired consumers having access to a tablet, compared to almost six in ten (57%) non-disabled consumers. DE hearing-impaired consumers had the lowest access levels, at 15%, compared to non-disabled consumers in the same group (26%).

As with access to the internet or a PC/laptop, access to a tablet was comparable between consumers with partial hearing and those who were deaf.
Less than half of hearing-impaired consumers had access to a smartphone, compared to two-thirds of non-disabled consumers

Both hearing-impaired and non-disabled consumers had an increase of 18pp in levels of access to a smartphone in the home between 2012 and 2014. However, hearing-impaired consumers continued to have a lower level of access than non-disabled consumers in 2014 (46% vs. 66%) (Figure 59).

The youngest age group (15-34s) was the only age group to have lower access to smartphones; seven in ten (70%) hearing-impaired consumers had access, compared to more than eight in ten (82%) non-disabled consumers of the same age. This suggests that age was not a factor in the lower levels of access, and that disability did play a part.

In contrast, the oldest age group (75+) showed the opposite - a fifth (20%) of hearing-impaired consumers in this age group had access to a smartphone, higher than the proportion of non-disabled consumers (13%) of this age. As with non-disabled consumers, smartphone access declined with age for hearing-impaired consumers.

Across socio-economic groups, hearing-impaired consumers were less likely to have access to a smartphone, across all groups, than non-disabled consumers in the same group. The difference was most pronounced among DE consumers, with a 29pp difference (30% vs. 59%); they had the lowest levels of access. As hearing-impaired consumers were more likely than non-disabled consumers to be in this socio-economic group, this suggests that disability contributed to their lower level of access of a smartphone.

When comparing hearing impairment splits, access to a smartphone was comparable between consumers with partial hearing and deaf consumers.

Figure 58 Tablet access at home, among hearing-impaired consumers, by age and SEG

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859; hearing-impaired: 457; non-disabled: 15-34 = 5518, 35-54 = 5065, 55-64 = 2402, 65-74 = 1885, 75+ = 970; hearing-impaired: 15-34 = 54*, 35-54 = 68*, 55-64 = 84*, 65-74 = 125, 75+ = 124; non-disabled: AB = 3407, C1 = 5199, C2 = 3386, DE = 3867; hearing-impaired: AB = 97*, C1 = 128, C2 = 107, DE = 125
Caution: * indicative sample between 50 and 100
OOO= Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)
Smartphone access at home among hearing-impaired consumers, by age and SEG

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859; hearing-impaired: 457; non-disabled: 15-34 = 5518, 35-54 = 5065, 55-64 = 2402, 65-74 = 1885, 75+ = 970; hearing-impaired: 15-34 = 54*, 35-54 = 68*, 55-64 = 84*, 65-74 = 125, 75+ = 124; non-disabled: AB = 3407, C1 = 5199, C2 = 3386, DE = 3867; hearing-impaired: AB = 97*, C1 = 128, C2 = 107, DE = 125
Caution: * indicative sample between 50 and 100
○ ○ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

An increase in the proportion of hearing-impaired consumers with access to a smartphone prompted increased mobile internet access for this group

Accessing the internet at home was comparable between non-disabled and hearing-impaired consumers, with a majority in each group doing this in 2014 (93% vs. 94%) (Figure 60). This was despite a decrease in both groups of 3pp since 2012.

There was a large increase in the proportion of hearing-impaired consumers accessing the internet via their mobile device, up by 16pp (to 37%) since 2012. But because non-disabled consumers had a bigger increase (of 24pp to 59%) over the same period, hearing-impaired consumers continued to lag behind non-disabled consumers in 2014. Both groups’ increased mobile access will have been influenced by their increased levels of access to a smartphone.

Accessing the internet in another location (such as at work, or on a public PC such as in an internet café or library) increased by 2pp (to 38%) for non-disabled consumers since 2012. However, hearing-impaired consumers’ access was unchanged and remained lower than the proportion of non-disabled consumers in 2014 (27%).

Due to the low sample of deaf consumers with internet access, comparisons cannot be made between these and consumers with partial hearing.
Hearing-impaired consumers were significantly more likely than non-disabled consumers to access the internet once a day or less often

Six in ten (59%) hearing-impaired consumers accessed the internet (at home or elsewhere) several times a day, lower than the proportion of non-disabled consumers (76%) (Figure 61). Nevertheless, this disability group had a similar level of increase as non-disabled consumers in frequency of access; for hearing-impaired it rose by 12pp, and for non-disabled by 10pp.

Conversely, hearing-impaired consumers were more likely than non-disabled consumers to access the internet around once a day (20% vs. 14%), although both groups saw a decrease since 2012 for this frequency; hearing-impaired down by 7pp, and non-disabled down by 5pp.

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27 Due to the low sample of deaf consumers with internet access, comparisons cannot be made between these and consumers with partial hearing
Hearing-impaired consumers were significantly less likely than non-disabled consumers to use the internet for communications, gaming or AV content

Of the various activities consumers used the internet for, communications (such as email, VoIP, and social networking) was the most popular, for all disability groups and for non-disabled consumers (Figure 62). However, hearing-impaired consumers had a lower proportion than non-disabled consumers undertaking this activity in 2014 (92% vs. 96%), with no change in these proportions since 2012.28

As with the other disability groups, gaming was the least popular use of the internet; and again, hearing-impaired consumers were less likely than non-disabled consumers to do this (14% vs. 21%). This was despite a 3pp increase for both groups since 2012. These lower levels of use may be a reflection of the older age profile of this disability group.

Using the internet for audio-visual content also attracted a lower proportion of hearing-impaired consumers (38%) than non-disabled consumers (49%). This could be in part due to their disability, although this disability group had an increase of 8pp in the level of this activity since 2012, close to the 10pp increase among non-disabled consumers.

Both information gathering and online shopping were comparable between hearing-impaired and non-disabled consumers in 2014.

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28 Due to the low sample of deaf consumers with internet access, comparisons cannot be made between these and consumers with partial hearing.
**Figure 62** Types of internet use, among hearing-impaired consumers with internet access (anywhere)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Non-disabled</th>
<th>Hearing impaired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications</td>
<td>96%</td>
<td>92%</td>
</tr>
<tr>
<td>Information</td>
<td>88%</td>
<td>87%</td>
</tr>
<tr>
<td>Shopping</td>
<td>71%</td>
<td>67%</td>
</tr>
<tr>
<td>Gaming</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>AV</td>
<td>43%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014

Base: Consumers with internet access: non-disabled: 13,915; hearing-impaired: 317

●● = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

### 8.4.2 Focus on telecoms access (landline and any type of mobile phone)

This section assesses in more detail hearing-impaired consumers’ access to landline and any mobile phones in the home, and compares access by age and socio-economic group. ‘Any’ mobile phones within the survey include both simple and smartphones; although a focus on smartphones is included in sub-section 8.4.1 (Internet and connected devices).

**More than eight in ten hearing-impaired consumers had access to a landline in the home, significantly higher than the proportion of non-disabled consumers**

Perhaps as a reflection of their older profile, hearing-impaired consumers were more likely than non-disabled consumers to have access to a landline in the home (83% vs. 72%) (Figure 63). This was contributed to by non-disabled consumers’ decrease in access since 2012, although access levels for hearing-impaired consumers remained static.

Differences in access levels were most evident among the older age groups, with around nine in ten hearing-impaired consumers aged 65+ having access, compared to around eight in ten non-disabled consumers. Consumers under 65 had comparable levels of access between hearing-impaired and non-disabled consumers. Both groups saw an increase in access with age.

Within socio-economic groups, AB hearing-impaired consumers had comparable levels of access to AB non-disabled consumers. However, hearing-impaired consumers in groups C1, C2 and DE were all more likely that non-disabled consumers in the same group to have access to a landline, although access declined in line with socio-economic status. The biggest gaps were in the C1 (88% vs. 74%) and C2 (86% vs. 71%) groups.

When comparing hearing impairment splits, access to a landline was comparable between consumers with partial hearing and deaf consumers.
A majority of hearing-impaired consumers had access to any type of mobile phone in the home, but this was lower than the proportion of non-disabled consumers

Overall, access to a mobile phone (simple or smartphone) in the home was lower for hearing-impaired consumers (86%) than for non-disabled consumers (89%), although differences in access were apparent only in socio-economic group DE (Figure 64). The overall lower levels were exacerbated by non-disabled consumers’ increase in access since 2012, whereas hearing-impaired consumers’ level was unchanged.

Each age group had comparable levels of access between this disability group and non-disabled consumers. Those aged 75+ had the lowest levels of access (77%), with the other age groups ranging from 85% to 92%.

Hearing-impaired consumers in the DE socio-economic group were the only group that differed from non-disabled consumers with the same profile. Almost eight in ten (78%) hearing-impaired consumers had access to a mobile phone in the home, compared to almost nine in ten (87%) non-disabled consumers.

When comparing hearing impairment splits, access to a mobile was comparable between consumers with partial hearing and deaf consumers.
8.4.3 Focus on broadcast access (TV and radio)

This section assesses in more detail hearing-impaired consumers’ access to pay-TV services (satellite/cable), free-to-air TV services (Freeview/Freesat), and a DAB radio in the home, comparing access levels by age and socio-economic group.

Hearing-impaired consumers’ levels of access to a pay-TV service were unchanged, and remained lower than those of non-disabled consumers

Almost half (48%) of hearing-impaired consumers had access to a pay-TV (satellite/cable) service in the home, lower than the overall proportion of non-disabled consumers (55%) (Figure 65). Neither group saw a change in access levels since 2012.

Access levels were comparable between the two groups across all ages, and declined with age for both.

However, hearing-impaired consumers in the C1 socio-economic group were less likely than non-disabled consumers with the same profile to have access (45% vs. 56%).

When comparing hearing impairment splits, access to a pay-TV service was comparable between consumers with partial hearing and deaf consumers.
Figure 65 Pay-TV access at home among hearing-impaired consumers, by age and SEG

Source: British Population Survey, 1 August - 20 November 2014

Base: non-disabled: 15,859; hearing-impaired: 457; non-disabled: 15-34 = 5518, 35-54 = 5065, 55-64 = 2402, 65-74 = 1885, 75+ = 970; hearing-impaired: 15-34 = 54*, 35-54 = 68*, 55-64 = 84*, 65-74 = 125, 75+ = 124; non-disabled: AB = 3407, C1 = 5199, C2 = 3386, DE = 3867; hearing-impaired: AB = 97*, C1 = 128, C2 = 107, DE = 125

Caution: * indicative sample between 50 and 100

○ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

Hearing-impaired consumers were more likely than non-disabled consumers to have access to a free-to-air TV service

Unlike pay TV, hearing-impaired consumers were more likely than non-disabled consumers to have access to a free-to-air (Freeview/Freesat) TV service in the home (61% vs. 50%) (Figure 66). This higher level of access was contributed to by non-disabled consumers’ decrease in access levels since 2012, whereas hearing-impaired consumers’ access remained static.

Access to a free-to-air TV service was comparable between both groups, for all age groups, but in contrast to pay-TV access, it increased with age for both groups.

Within socio-economic group, a difference was seen in both the C2 and DE groups: hearing-impaired consumers had higher levels of access. Two-thirds (66%) of hearing-impaired C2 consumers had access to Freeview/Freesat, compared to half (49%) of non-disabled consumers in this group. There was a smaller gap among DE consumers, with almost six in ten (57%) hearing-impaired consumers in this group having access, compared to almost five in ten (47%) non-disabled consumers.

When comparing hearing impairment splits, access to a free-to-air TV service was comparable between consumers with partial hearing and those who were deaf.
Figure 66  Free-to-air TV access at home among hearing-impaired consumers, by age and SEG

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859; hearing-impaired: 457; non-disabled: 15-34 = 5518, 35-54 = 5065, 55-64 = 2402, 65-74 = 1885, 75+ = 970; hearing-impaired: 15-34 = 54*, 35-54 = 68*, 55-64 = 84*, 65-74 = 125, 75+ = 124; non-disabled: AB = 3407, C1 = 5199, C2 = 3386, DE = 3867; hearing-impaired: AB = 97*, C1 = 128, C2 = 107, DE = 125
Caution: * indicative sample between 50 and 100

Hearing-impaired consumers had comparable levels of access to a DAB radio in the home to non-disabled consumers

Three in ten (30%) hearing-impaired consumers had access to a DAB radio in the home, comparable to 26% of non-disabled consumers, with neither group seeing a change in access levels since 2012 (Figure 67).

Access levels were comparable across all age groups, with lower access for both hearing-impaired and non-disabled in the youngest (15-34) and oldest (75+) age groups.

However, there were some differences by socio-economic group. Hearing-impaired consumers in C2 group were more likely than non-disabled consumers in the same group to have access to a DAB radio (37% vs. 29%). This difference was also seen in the DE group, with 18% of hearing-impaired consumers having access, compared to 12% of non-disabled DE consumers. Hearing-impaired consumers in groups C2 and DE were half as likely as those in AB and C1 to have access to a DAB radio.

When comparing hearing impairment splits, consumers with partial hearing were more likely to have access to a DAB radio (32%) compared to deaf consumers (15%).
Figure 67 DAB radio access at home among hearing-impaired consumers, by age and SEG

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15-54 = 5518, 55-64 = 2402, 65-74 = 1885, 75+ = 970; hearing-impaired: AB = 97*, C1 = 128, C2 = 107, DE = 125
Caution: *Indicative sample between 50 and 100

8.5 Personal use of devices and services

This is a new section in the report, and focuses on personal use of communication devices and services among hearing-impaired consumers.

Hearing-impaired consumers had significantly lower levels of personal use, compared to access levels, for most of the reported devices and services

The proportion of hearing-impaired consumers who personally used each device or service was lower than the proportion with access to that device/service in the home (Figure 68).

Levels of personal use of a landline and of any type of mobile phone were lower than levels of access to these devices for hearing-impaired consumers. Each device showed a similar gap between use and access: for landlines, an 11pp difference (72% vs. 83%), and for mobile phones, a 13pp difference (73% vs. 86%). As hearing-impaired consumers were more likely than non-disabled consumers to have access to a landline (72%), these lower levels of personal use may be due in part to their disability.

Hearing-impaired consumers also had a gap of 10pp between personal use of, and access to, a tablet (22% vs. 32%), although their levels of access were comparable to their use of the internet. This disability group had lower levels of access than non-disabled consumers to a tablet among those aged 35-54 (38% vs. 51%), which suggests that disability, rather than age, was a factor in the lower levels of personal use for this disability group.

29 For the purposes of comparing access to personal use, PC/laptop as a device was excluded and TV was split by platform to reflect the structure of the survey
30 Non-disabled consumers were not asked about their personal use of devices and services within the survey, therefore comparison cannot be made between these and disabled consumers
Personal use of both pay TV and free-to-air TV services was also lower than access levels for hearing-impaired consumers. Both satellite TV and Freeview TV services had a gap of 7pp between use and access levels for this disability group (26% vs. 33% for satellite; 51% vs. 58% for Freeview). However, levels of access of both cable TV and Freesat were comparable to use for these consumers.

Use of a DAB radio use was also lower, with a gap of 6pp below the access level (24% vs. 30%).

Figure 68 Access compared to personal use of devices/services among hearing-impaired consumers

Source: British Population Survey, 1 August - 20 November 2014
Base: hearing-impaired: 457

O=Notes whether personal use levels of each device/service for hearing-impaired consumers was statistically significantly lower than access levels of that device/service

* Personal use of the internet is defined by those who use the internet at least once a month; other devices and services were specifically asked about if the respondent personally used them

Hearing-impaired consumers were more likely than the average for all disabled consumers to personally use a Freesat TV service

When compared to the average for disabled consumers, hearing-impaired consumers were more likely to use Freesat (6%); this was reflected in their higher levels of access (to free-to-air TV services) and comparable use of this Freesat service (Figure 69). Freeview and pay-TV services had comparable levels of use to disabled consumers overall.
8.6 Stated limitations in use of devices/services due to disability

This is a new section in the report; it aims to help us further understand whether lower access levels to, or use of, communication devices and services were limited by consumers’ disabilities. To inform this analysis, the survey asked whether disabled consumers considered this to be the case.

Hearing-impaired consumers said their use of the internet and computing devices was the activity least limited by their disability, compared to the other devices/services

Overall, three in ten (30%) hearing-impaired consumers said that their disability limited or prevented their use of any of the communication devices and services, significantly higher than the average for all disabled consumers (22%).

Hearing-impaired consumers said that using a computing device was the activity least limited by their disability. Four per cent said their use of a PC/laptop was limited, while 3% said this about a tablet (Figure 70). This was also reflected in the 3% of hearing-impaired consumers who said their use of the internet was limited by their disability. Similar proportions said they used these devices, even though their use was limited by their disability (3% PC/laptop, 1% tablet). Therefore, a minority (1%-2%) of non-users of PCs/laptops and tablets said their use of these devices was prevented by their disability.

Around one in ten (11%) hearing-impaired consumers said their use of a TV was limited or prevented by their disability. Despite this, the same proportion (11%) said they used a TV even though such use was limited, suggesting that there were no hearing-impaired consumers who said they did not use a TV due to their disability.

Use of telecoms devices were limited most; almost two in ten (18%) hearing-impaired consumers said their use of a landline was limited or prevented by their disability, and over one in ten (12%) said the same for a mobile phone. However, the landline had a higher proportion of hearing-impaired consumers using it, despite saying its use was limited by their disability (11%), suggesting that for 7% of this disability group that did not use a landline, this was partly due to their disability. A lower proportion of hearing-impaired consumers said they
used a mobile phone, despite its use being limited by their disability (8%), which suggests that 4% did not use this device partly because of their disability.\textsuperscript{31}

Figure 70 Hearing-impaired consumers, impact of disability on using devices

<table>
<thead>
<tr>
<th>HEARING IMPAIRED</th>
<th>% who feel their disability limits/ prevents use of device/service</th>
<th>% who personally use device/service (but use is impacted by disability)</th>
<th>% who do not use device/service (use impacted by disability)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landline</td>
<td>18%</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>Mobile</td>
<td>12%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Internet*</td>
<td>3%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>PC/laptop</td>
<td>4%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Tablet</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>TV</td>
<td>11%</td>
<td>11%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014
Base: hearing-impaired: 457

\textsuperscript{31} The survey did not ask respondents about the use of text relay, a service for people with hearing or speech impairments, which offers text-to-speech and speech-to-text translation services. For more information, see http://consumers.ofcom.org.uk/disability/text-relay-guide/
Section 9

Consumers with visual impairments

9.1 Introduction

This section assesses in more detail the position of consumers with a visual impairment (only). It details the services and devices they have access to in the home, their use of them, and any limitations felt on using them. It also provides more information on the impact of demographics and other factors.

Consumers with visual impairments accounted for around one in ten (8%) of the total sample of disabled consumers. Due to the relatively low incidence, and consequently lower sample size, of consumers who classified themselves as blind (as opposed to having partial or poor sight), the analysis in this section does not include splits by visual impairment type.32

9.2 Key trends

- **Three-quarters of visually-impaired consumers had access to the internet (anywhere), compared to nine in ten non-disabled consumers.** Both non-disabled and visually-impaired consumers’ internet access (at home or elsewhere) had increased since 2012, although visually-impaired remained less likely to have access (75% vs. 88%). The older age profile of visually-impaired consumers (33% aged 65+) explains some of the difference in levels of access, as well as the lower levels of access to computing devices (PCs/laptops and tablets) among this disability group, and the stated impact of their disability in limiting use of such devices.

- **Visually-impaired consumers were significantly less likely than non-disabled consumers to have access to any type of mobile phone in the home.** Around eight in ten (83%) had access to a mobile phone (simple or smartphone), compared to nine in ten (89%) non-disabled consumers, with access levels unchanged for this disability group since 2012. Both groups’ levels of smartphone access had increased, although for visually-impaired consumers this remained lower (up 15pp to 48% vs. non-disabled up 18pp to 66%).

- **Access to a pay-TV service in the home was significantly lower for visually-impaired consumers than for non-disabled consumers.** Almost half (48%) the visually-impaired consumers had access to a pay-TV (satellite/cable) service in the home, compared to 55% of non-disabled consumers. This was driven by the lower access among DE consumers with a visual impairment.

    **A third of visually-impaired consumers said their disability limited or prevented their use of communication services and devices.** These consumers were less likely to say that their disability limited their use of a landline (6% stated this) compared to use of other devices (11%-14%). Use of a tablet was most limited by a consumers’ visual disability; 7% said they did not use a tablet as factors including their disability prevented this.

32 Blind sample: 36 – therefore too low to report, Partially sighted sample: 283
9.3 Profile

Consumers with a visual impairment were significantly more likely than non-disabled consumers to be aged over 65

Visually-impaired consumers had an older age profile than non-disabled consumers; a third (33%) were aged 65+, compared to almost a fifth (18%) of non-disabled consumers, and 17% of visually-impaired consumers were aged 75+ (vs. 6% of non-disabled) (Figure 71).

In contrast, around a quarter (23%) of visually-impaired consumers were aged 15-34, while a third (35%) of non-disabled consumers were in this age group.

Figure 71 Age profile of visually-impaired consumers

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859, visually-impaired: 319
○ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

Visually-impaired consumers aged over 55 were significantly more likely than non-disabled consumers to be in socio-economic group DE

Analysis of the combined socio-economic and age profile shows that visually-impaired consumers in age groups 55-64, 65-74 and 75+ were more likely than non-disabled consumers in these age groups to be in socio-economic group DE (Figure 72).

The largest gap was seen in DE consumers aged 75+ - 53% visually-impaired vs. 26% non-disabled consumers.
Figure 72 Combined age and SEG profile of visually-impaired consumers

![Combined age and SEG profile of visually-impaired consumers](image)

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15-34 = 5518, 15-34* = 73, 15-34* = 90, 15-34* = 52, 15-34* = 51, 75+ = 53
Caution: * indicative sample between 50 and 100
= Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

Visually-impaired consumers were significantly more likely than non-disabled consumers to be in retirement

The working profile of consumers with a visual impairment differed from that of non-disabled consumers. Around two-fifths (41%) were in employment, compared to over half (56%) of non-disabled consumers; a third (35%) were retired, compared to a fifth (21%) of non-disabled consumers (Figure 73). This is a reflection of the older age profile of this disability group.

Figure 73 Working status among visually-impaired consumers

![Working status among visually-impaired consumers](image)

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859, visually-impaired: 319
= Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)
Visually-impaired consumers were significantly more likely than non-disabled consumers to live alone

A quarter (25%) of visually-impaired consumers lived in a single-occupancy household, compared to less than a fifth (16%) of non-disabled consumers (Figure 74). In contrast, visually-impaired consumers were less likely than non-disabled consumers to live in households of three or more people (39% vs. 51%).

These results can be attributed to the older age profile of this disability group.

**Figure 74  Visually-impaired consumers, by household size**

Source: British Population Survey, 1 August - 20 November 2014  
Base: non-disabled: 15,859; visually-impaired: 319  
●● = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

### 9.4 Access to devices and services: overview

Visually-impaired consumers were significantly less likely than non-disabled consumers to have access to mobile telecoms, computing devices/services, or pay TV in the home

Figure 75 provides a summary of levels of access to key devices and services, comparing visually-impaired, all disabled and non-disabled consumers.

There were similar levels of access in the home to landline telephony, free-to-air (Freeview/Freesat) TV services, games consoles, and DAB radio in the home. Access to all other communication devices and services was lower among those with a visual impairment than among non-disabled consumers.

While access to a smartphone in the home had increased since 2012 for both visually-impaired and non-disabled consumers, those with a visual impairment remained less likely than the non-disabled to have access to a smartphone (48% vs. 66%) or any type of mobile phone (83% vs. 89%).

Access to the internet (at home or elsewhere) and a tablet computer in the home had both increased for visually-impaired consumers since 2012, with internet access up 13pp (to 75%) and access to a tablet up 22pp (to 33%). However, both remained lower than the levels for non-disabled consumers in 2014 (88% and 42% respectively), which had also increased since 2012.
Access to a PC/laptop in the home was lower among the visually-impaired than among non-disabled consumers in 2014 (66% vs. 79%), with no increase since 2012 for either group.

Access to a pay-TV (satellite/cable) service in the home was also lower for visually-impaired consumers (48%) than for non-disabled consumers (55%), again with no increase since 2012 for either group.

**Figure 75 Access to devices and services among visually-impaired consumers**

<table>
<thead>
<tr>
<th></th>
<th>Non-disabled</th>
<th>All disabled</th>
<th>Visually impaired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landline</td>
<td>72%</td>
<td>77%</td>
<td>75%</td>
</tr>
<tr>
<td>Any mobile</td>
<td>89%</td>
<td>85%</td>
<td>83%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>66%</td>
<td>41%</td>
<td>48%</td>
</tr>
<tr>
<td>PC/laptop</td>
<td>79%</td>
<td>64%</td>
<td>66%</td>
</tr>
<tr>
<td>Internet access</td>
<td>88%</td>
<td>65%</td>
<td>75%</td>
</tr>
<tr>
<td>Tablet</td>
<td>42%</td>
<td>30%</td>
<td>33%</td>
</tr>
<tr>
<td>Games console</td>
<td>32%</td>
<td>21%</td>
<td>27%</td>
</tr>
<tr>
<td>Pay-TV</td>
<td>55%</td>
<td>48%</td>
<td>48%</td>
</tr>
<tr>
<td>Free-to-air TV</td>
<td>50%</td>
<td>60%</td>
<td>55%</td>
</tr>
<tr>
<td>DAB</td>
<td>26%</td>
<td>25%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859; all disabled: 4,004; visually-impaired: 319

○○ = Statistically significantly different at 95% confidence level, than non-disabled in 2014

↑↓ = Statistically significantly higher or lower at 95% confidence level, than 2012

9.4.1 Focus on internet access and connected devices (PCs/laptops, tablets, and smartphones)

This section assesses in more detail visually-impaired consumers’ access to the internet in general, where they access it, how often, and what they use it for. Internet access was based on access anywhere, i.e. both inside and outside the home, including use via mobile devices. We also consider visually-impaired consumers’ access levels to connected devices in the home, i.e. PCs/laptops, tablets, and smartphones, and compare access by age and socio-economic group.

Internet access (anywhere) was significantly lower for over-65s and less affluent visually-impaired consumers than for their non-disabled counterparts

As mentioned above, visually-impaired consumers were less likely than non-disabled consumers to have internet access (75% vs. 88%). This was driven by access among those aged 65+; visually-impaired consumers aged 65-74 and 75+ had lower levels of access than their non-disabled counterparts (Figure 76). The largest gap in access between the two groups was among those aged 75+ (19% of those with a visual impairment vs. 42% non-disabled).
With the exception of C1 consumers, there were lower levels of internet access among the visually-impaired across all socio-economic groups. DE consumers had the largest gap; just under three in five (58%) visually-impaired consumers had access, compared to almost four in five (78%) non-disabled DE consumers.

Figure 76 Internet access (anywhere) among visually-impaired consumers, by age and SEG

Two-thirds of visually-impaired consumers had access to a PC/laptop in the home, significantly lower than the proportion of non-disabled consumers

Access to a PC/laptop was lower among the visually-impaired than among non-disabled consumers (66% vs. 79%) (Figure 77). Neither group’s access had increased since 2012.

Visually-impaired consumers aged 75+ were less likely than non-disabled consumers of the same age to have access to a PC/laptop (26% vs. 44%). Those aged 35-54 also had a difference in levels of access: 76% of visually-impaired consumers compared to 85% of non-disabled consumers. All other age groups had levels of access comparable to non-disabled consumers.

Visually-impaired consumers in C2DE socio-economic groups were less likely than C2DE non-disabled consumers to have access to a PC/laptop (C2: 57% vs. 77%; DE: 48% vs. 67%). ABC1 consumers had comparable levels of access.
Although tablet access (at home) had tripled since 2012, visually-impaired consumers remained less likely than non-disabled consumers to have access

Visually-impaired consumers' access to a tablet in the home grew from 11% in 2012 to 33% in 2014. However, their access to a tablet remained lower than for non-disabled consumers (42%) (Figure 78).

This lower access is driven by those aged 75+. Within age groups, visually-impaired consumers aged 75+ were less likely than non-disabled consumers in this age group to have access to a tablet (4% vs 14%). All other age groups had comparable levels of access, with access levels declining with age.

Visually-impaired consumers in socio-economic group DE were also less likely than non-disabled DE consumers to have access to a tablet (14% vs. 26%). All other socio-economic groups had comparable levels of access.
Despite a rise in access to a smartphone, access levels remained lower among visually-impaired consumers than among non-disabled consumers

About half (48%) of consumers with a visual impairment had access to a smartphone in the home, compared to two-thirds (66%) of non-disabled consumers (Figure 79). Since 2012 both groups had experienced an increase in smartphone access of 15pp and 18pp respectively.

The lower smartphone access among the visually-impaired consumers was driven by those aged 35-64, with six in ten (60%) aged 35-54 having access, compared to over seven in ten (75%) non-disabled consumers, and four in ten (42%) visually-impaired consumers aged 55-64 having access, compared to almost six in ten (57%) non-disabled consumers of the same age.

Visually-impaired consumers had lower levels of access to a smartphone in all socio-economic groups, with the exception of AB consumers. The largest gaps were among the C2 (40% vs. 65%) and DE groups (35% vs. 59%).

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled total: 15,859; visually-impaired total: 319; non-disabled: 15-34= 5518, 35-54= 5065, 55-64= 2402, 65-74= 1885, 75+= 970; visually-impaired: 15-34 = 73*, 35-54 = 90*, 55-64 = 52*, 65-74 = 51*, 75+= 53* non-disabled: AB = 3407, C1 = 5199, c2 = 3386, DE = 3867; visually-impaired: AB = 50*, C1 = 100, C2 = 60*, DE = 109
Caution: * indicative sample between 50 and 100
○ ○ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)
Increased access to a smartphone at home appears to have led to increased mobile internet access for visually-impaired consumers

Since 2012, accessing the internet via a mobile device, among consumers with a visual impairment, had risen by 22pp to 51% (Figure 80). This is likely to have been boosted by the overall increase in access to a smartphone among this group (up 15pp between 2012 and 2014 to 48%). Despite this, levels of internet access via a mobile device remained lower than for non-disabled consumers (59%).

Visually-impaired consumers' access to the internet at home (via a PC, TV or games console) had decreased by 5pp since 2012 to 90%, and remained lower than that of non-disabled consumers (93%).

Access to the internet elsewhere (such as at work, place of study or a public place such as an internet café or library) was similar for both groups, at 38%.
Visually-impaired consumers were significantly less likely than non-disabled consumers to access the internet several times a day

Less than seven in ten (68%) visually-impaired consumers accessed the internet (at home or elsewhere) several times a day, compared to over three-quarters (76%) of non-disabled consumers (Figure 81). There was no change in this level for visually-impaired consumers when compared to 2012, but non-disabled consumers did have a significant increase of 10pp in this period.

Similar levels of visually-impaired and non-disabled consumers reported accessing the internet less frequently (from once a day to less than once a month).
Figure 81 Frequency of internet use among visually-impaired consumers with internet access (anywhere)

Source: British Population Survey, 1 August - 20 November 2014
Base: Consumers with internet access: non-disabled: 13,915, visually-impaired: 239
○○ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

Visually-impaired and non-disabled consumers had similar levels internet activity

Consumers with a visual impairment had levels of undertaking each activity on the internet comparable with non-disabled consumers; communication and obtaining information were the most common uses, among both groups (Figure 82).

Figure 82 Types of internet use among visually-impaired consumers with internet access (anywhere)

Source: British Population Survey, 1 August - 20 November 2014
Base: Consumers with internet access: non-disabled: 13,915, visually-impaired: 239
○○ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)
9.4.2 Focus on telecoms access (landline and any type of mobile phone)

This section assesses in more detail visually-impaired consumers’ access to landline and any mobile phones in the home, and compares access by age and socio-economic group. ‘Any’ mobile phones within the survey include both simple and smartphones; although a focus on smartphones is included in sub-section 9.4.1 (Internet and connected devices).

Three-quarters of visually-impaired consumers had access to a landline in the home, comparable to non-disabled consumers

At 75%, visually-impaired consumers had similar levels of access to a landline in the home as non-disabled consumers (72%) (Figure 83). This was despite non-disabled consumers’ access decreasing by 2pp since 2012 (visually-impaired consumers’ level was unchanged).

Within age groups, visually-impaired consumers aged 55-64 were less likely than non-disabled consumers in this age group to have access to a landline (71% vs. 82%). All other age groups had comparable levels of access, with access increasing with age.

Within socio-economic groups, the only significant difference was that access to a landline was higher among DE visually-impaired consumers (72%) compared to DE non-disabled consumers (61%).

Figure 83 Landline access at home among visually-impaired consumers, by age and SEG

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled total: 15,859; visually-impaired total: 319; non-disabled: 15-34= 5518, 35-54= 5065, 55-64= 2402, 65-74= 1885, 75+= 970; visually-impaired: 15-34 = 73*, 35-54 = 90*, 55-64 = 52*, 65-74 = 51*, 75+ = 53* non-disabled: AB = 3407, C1 = 5199, C2 = 3386, DE = 3867; visually-impaired: AB = 50*, C1 = 100, C2 = 60*, DE = 109
Caution: * indicative sample between 50 and 100
○○ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

Visually-impaired consumers were significantly less likely than non-disabled consumers to have access to any mobile phone in the home

Around eight in ten (83%) visually-impaired consumers had access to a mobile phone (simple or smartphone) in the home, compared to nine in ten (89%) non-disabled consumers (Figure 84). These lower levels of access were influenced by the unchanged level of access for this disability group since 2012 (despite an increase in access to a smartphone), while non-disabled consumers had an increase of 2pp.
Lower access was noted among visually-impaired consumers aged 35-54 and those in socio-economic groups C2 and DE. All other age and socio-economic groups had comparable levels of access between visually-impaired and non-disabled consumers.

Figure 84 Mobile phone access (any type) at home among visually-impaired consumers, by age and SEG

9.4.3 Focus on broadcast access (TV and radio)

This section assesses in more detail visually-impaired consumers’ access to pay-TV services (satellite/cable), free-to-air TV services (Freeview/Freesat), and a DAB radio in the home, comparing access levels by age and socio-economic group.

Visually-impaired consumers were less likely than non-disabled consumers to have access to a pay-TV service in the home

Visually-impaired consumers were less likely than non-disabled consumers to have access to a pay-TV (satellite/cable) service in the home (48% vs. 55) (Figure 85). Neither group had a change in access levels since 2012.

Access levels were comparable within age and socio-economic group, with the exception of DE consumers, where almost four in ten (37%) visually-impaired DE consumers had access, compared to five in ten (51%) non-disabled DE consumers.
Visually-impaired consumers had levels of access comparable to non-disabled consumers to a free-to-air TV service in the home

Unlike pay TV, free-to-air (Freeview/Freesat) TV service access levels were broadly similar between non-disabled consumers and those with a visual impairment (50% vs. 55%) (Figure 86). This was despite a decline in access levels of 3pp among non-disabled consumers since 2012: among visually-impaired consumers there was no change.

Within age groups, access levels were comparable to non-disabled consumers, and in contrast to pay TV, access increased with age.

Also in contrast to pay-TV access, visually-impaired DE consumers had higher access levels than non-disabled DE consumers to a free-to-air TV service (66% vs. 47%).
Visually-impaired and non-disabled consumers had comparable access to a DAB radio in the home

Around a quarter (24%) of consumers with a visual impairment had access to a DAB radio in the home, comparable to non-disabled consumers (26%) (Figure 87). This was reflected across age and socio-economic groups.

Neither visually-impaired consumers nor non-disabled consumers had any change in access levels since 2012.
9.5 Personal use of devices and services

This is a new section in the report, and focuses on personal use of communication devices and services among visually-impaired consumers.

Visually-impaired consumers had significantly lower levels of personal use, compared to access levels, for most of the reported devices and services

As with the other disability groups, the proportion of visually-impaired consumers who personally used a device or service was lower than the proportion with access to that device/service in the home (Figure 88).

Levels of personal use of either a landline or any type of mobile phone were lower than access levels for visually-impaired consumers. Use of a mobile phone showed the largest gap (15pp) between access and use (83% vs. 68%), while the difference between use and access for a landline was 12pp (75% vs. 63%).

Personal use of a Freeview TV service was also lower for visually-impaired consumers than their level of access to this service, and showed a gap similar to the telecoms devices: 11pp (42% vs. 53%). There was a difference of 6pp between access and use of cable TV (18% vs. 12%), while levels of access and use for both satellite TV and Freesat were similar for this disability group.

For the purposes of comparing access to personal use, PC/laptop as a device was excluded and TV was split by platform to reflect the structure of the survey

Non-disabled consumers were not asked about their personal use of devices and services in the survey, therefore comparison cannot be made between these and disabled consumers.
Visually-impaired consumers also reported a gap between access and personal use of a tablet: 9pp (33% vs. 24%). However, levels of access and use of the internet were comparable, suggesting that the tablet as a device was limiting consumers’ use, perhaps as a result of their disability.

**Figure 88** Access compared to personal use of devices/services among visually-impaired consumers

Freeview was the only device/service that visually-impaired consumers were less likely than all other disabled consumers to use

Visually-impaired consumers were less likely than all disabled consumers to personally use a Freeview TV service in the home (42% vs. 49%) (Figure 89).

This disability group had comparable levels of use of all other devices and services to disabled consumers overall.
9.6 Stated limitations of use of devices/services due to disability

This is a new section in the report; it aims to help us to further understand whether lower access levels, or use of communication devices and services, were limited by consumers' disabilities. To inform this analysis, the survey asked whether disabled consumers considered this to be the case.

Compared to the other disability groups, visually-impaired consumers were less likely to say that their disability limited their ability to use a landline, compared to other devices/services

Overall, around a third (32%) of visually-impaired consumers said that their disability limited or prevented their use of any of the communication devices and services, significantly higher than the average for all disabled consumers (22%).

Visually-impaired consumers were the disability group least likely to say that their disability limited their use of a landline; 6% stated this (compared to 8%-18% for the other disability groups). Three per cent said they used a landline, but its use was limited by their disability, and a further 3% said they did not use a landline, at least partly because of their disability (Figure 90).

This compares to over one in ten (13%) consumers with a visual impairment who said their use of a mobile was limited or prevented by their disability. Nine per cent said they did use a mobile but its use was limited, while 4% said their disability was a factor in their non-use of a mobile.

A similar proportion (14%) of visually-impaired consumers said their use of a PC/laptop was limited or prevented by their disability, with the majority (11%) saying they used these devices although their use was limited by their disability. A further 3% said they did not use a PC/laptop, and that their disability was a factor in this.
One in ten visually-impaired consumers said their use of a tablet was limited or prevented by their disability (11%). Four per cent said they personally used this device but that their use was limited, and 7% said they did not use this device and they felt their use was prevented by their disability.

More than one in ten (14%) visually-impaired consumers said their use of a TV was limited or prevented by their disability, with most of these indicating that use was limited (12%) as opposed to prevented (2%).

**Figure 90 Visually-impaired consumers: impact of disability on use of devices**

<table>
<thead>
<tr>
<th></th>
<th>VISUALLY IMPAIRED</th>
</tr>
</thead>
<tbody>
<tr>
<td>% who feel their disability limits/prevents use of device/service</td>
<td>% who personally use device/service (but use is impacted by disability)</td>
</tr>
<tr>
<td>Landline</td>
<td>6%</td>
</tr>
<tr>
<td>Mobile</td>
<td>13%</td>
</tr>
<tr>
<td>Internet*</td>
<td>13%</td>
</tr>
<tr>
<td>PC/laptop</td>
<td>14%</td>
</tr>
<tr>
<td>Tablet</td>
<td>11%</td>
</tr>
<tr>
<td>TV</td>
<td>14%</td>
</tr>
</tbody>
</table>

*Source: British Population Survey, 1 August - 20 November 2014  
Base: visually-impaired: 319
Section 10

Consumers with multiple impairments

10.1 Introduction

This section assesses in more detail the position of consumers with multiple impairments. It covers the services and devices they have access to in their homes, their use of these, and any limitations felt on using them. It also provides more information on the impact of demographics and other factors.

Less than a fifth (17%) of the disability sample had multiple impairments: i.e. at least two of the following impairments: mobility, hearing, vision.

10.2 Key trends

- **Half of multiple-impaired consumers had internet access (anywhere), compared to nine in ten non-disabled consumers.** Internet access (anywhere) had increased by 8pp (to 49%) since 2012 for this disability group, but remained lower than for non-disabled consumers (up 5pp to 88%). The older age profile of consumers with multiple impairments (two-thirds were aged 65+) explains some of the difference in levels of access.

- **Despite increases in access to some computing devices for multiple-impaired consumers, access remained lower than for non-disabled consumers.** Since 2012, access to a tablet in the home had risen by 18pp (to 23%) and access to a games console by 4pp (to 16%). However, both tablets and games consoles had lower access levels among non-disabled consumers than in 2014 (at 42% and 32% respectively). Access to a PC/laptop did not increase for either group; multiple-impaired consumers continued to have lower access (54%) than non-disabled consumers (79%).

- **Multiple-impaired consumers were less than half as likely to have access to a smartphone as were non-disabled consumers.** Three in ten (29%) multiple-impaired consumers had access to a smartphone in the home, an increase of 12pp since 2012; but still lower than the proportion of non-disabled consumers in 2014 (66%). Access to any type of mobile phone in the home was up by 7pp to 82%, but remained lower than for non-disabled consumers (89%).

- **Multiple-impaired consumers were significantly more likely to have a free-to-air TV service, and less likely to have a pay-TV service, than non-disabled consumers.** Almost five in ten (46%) multiple-impaired consumers had access to a pay-TV (satellite/cable) service in the home, compared to 55% of non-disabled consumers. In contrast, access to a free-to-air (Freeview/Freesat) TV service was higher for this disability group (65%) than for non-disabled consumers (50%), with levels decreasing for non-disabled consumers since 2012.

- **A quarter of multiple-impaired consumers said their disability limited their use of communication services and devices.** These consumers were less likely to say that their disability limited their use of computing devices or the internet (6%-8% stating this) compared to their use of other devices (11%-12%). Use of a tablet was the most limited by consumers' multiple disabilities, with 5% saying they did not use a tablet as factors including their disability prevented this.
10.3 Profile

Consumers with multiple impairments were significantly older than non-disabled consumers, with over eight in ten aged 55+

Consumers with multiple impairments had an older age profile than non-disabled consumers: 83% of those with multiple impairments were aged over 55, compared to 33% of non-disabled. This age gap is largest for those aged over 75: 41% vs. 6% non-disabled (Figure 91).

Reflecting these findings, multiple-impaired consumers were less likely than non-disabled consumers to fall into the younger age groups. Less than one in ten (4%) were aged 15-34, compared to over two-thirds (35%) of non-disabled consumers, and 13% were aged 35-54 compared to 32% of non-disabled.

When comparing multiple impairment subdivisions to the overall multiple impairment sample, consumers with all three impairments (hearing, vision, and mobility) had the oldest profile; over half (52%) were aged 75+.

Figure 91 Age profile of multiple-impaired consumers

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859; All multiple-impaired: 698; hearing/vision: 284; hearing/mobility: 388; vision/mobility: 330; all three:152

Multiple-impaired consumers were significantly more likely than non-disabled consumers to have an older profile and to be in socio-economic group C2DE

Consumers with multiple impairments were less likely than non-disabled consumers to be in socio-economic group AB, across each age group (Figure 92).

Consumers with multiple impairments aged 35-64 were less likely than non-disabled consumers of the same age to be in socio-economic group C1: a fifth of consumers with multiple impairments in socio-economic group C1 were aged 35-54 (21%) or 55-64 (22%), compared to a third of non-disabled consumers (33% and 32% respectively). In contrast, those with multiple impairments aged 65-74 were more likely than non-disabled consumers of the same age to be in socio-economic group C2: almost three in ten multiple-impaired consumers aged 65-74 (27%) or 75+ (28%), compared to two in ten non-disabled
consumers (19% and 20% respectively). In addition, those aged 35-74 were more likely than non-disabled consumers to be in socio-economic group DE. Between 31% and 43% multiple-impaired consumers were aged 35-74 and in the DE group, compared to 18% to 23% of non-disabled consumers in the same age range. The proportion of multiple-impaired consumers aged 15-34 was too small to provide analysis**.

**Figure 92 Combined age and SEG profile of multiple-impaired consumers**

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15-34 = 5518, 35-54 = 5065, 55-64 = 2402, 65-74 = 1885, 75+ = 970; multiple-impaired: 15-34 = 27**, 35-54 = 89*, 55-64 = 130, 65-74 = 164, 75+ = 286
Caution: * indicative sample between 50 and 100; ** sample below 50 therefore not reported

Consumers with both hearing and mobility impairments were significantly more likely than other multiple-impaired consumers to be in retirement

The majority of multiple-impaired consumers were retired (69% vs. 21% of non-disabled consumers) (Figure 93). The older profile of this disability group was also reflected in their higher proportion within socio-economic group DE.

When comparing multiple impairment groupings, consumers with both hearing and mobility impairments were the most likely, among the total multiple impairment sample, to be in retirement (76%). This is corroborated by almost half (48%) of these consumers being over 75.

Compared to over half (56%) of non-disabled consumers, less than one in ten (8%) multiple-impaired consumers were in employment; this finding was similar among all multiple impairment groupings.

Consumers with both visual and mobility impairments were the most likely, out of the total multiple impairment sample, not to be working due to their disability (18%). In contrast, consumers with both hearing and visual impairments were the least likely not to be working due to their disability (8%).
Multiple-impaired consumers were significantly more likely than non-disabled consumers to live alone, or in a smaller household

Consumers with multiple impairments were more likely than non-disabled consumers to live in a single-person household (46% vs. 16%), or a household of two people (37% vs. 33%); this was comparable among each multiple impairment grouping (Figure 94).

Conversely, this disability group was less likely than non-disabled consumers to live in a household of three or more people (16% vs. 51%).

Source: British Population Survey, 1 August - 20 November 2014
○○= Statistically significant difference at 95% confidence level all multiple-impaired vs. non-disabled; each multiple-impaired grouping vs. all multiple-impaired (red = lower, green = higher)
10.4 Access to devices and services: overview

Consumers with multiple impairments were significantly less likely than non-disabled consumers to have access to mobile phones, computing devices/services, or pay TV in the home

Access to a landline in the home was higher for those with multiple impairments than for non-disabled consumers (82% vs. 72%) (Figure 95). This disability group were less likely to have access to any type of mobile phone (82% vs. 89%) or a smartphone (29% vs. 66%) in the home, despite significant increases since 2012 in access to these devices.

Access to the internet (at home or elsewhere) and a tablet (in the home) had risen for multiple-impaired consumers between 2012 and 2014, with internet access up 8pp (to 49%) and access to a tablet up 18pp (to 23%). However, both remained lower than the levels for non-disabled consumers in 2014 (88% and 42% respectively). Access to a PC/laptop in the home was also lower for this disability group than for non-disabled consumers in 2014 (54% vs. 79%), with no increase on 2012 for either group.

This group had an increase since 2012 in access to a games console in the home (up 4pp to 16%). However, remained lower than that of non-disabled consumers with access (32%).

Access to a free-to-air (Freeview/Freesat) TV service in the home was higher for those with multiple impairments (65%) than for non-disabled consumers (50%). In contrast, access to a pay-TV (satellite/cable) service in the home was lower for multiple-impaired consumers (46%) than for non-disabled consumers (55%). For both free-to-air and pay TV access, neither group’s access had changed since 2012.

Figure 95 Access to devices and services among multiple-impaired consumers

<table>
<thead>
<tr>
<th></th>
<th>Non-disabled</th>
<th>All disabled</th>
<th>All Multiple</th>
<th>Hearing/ Vision</th>
<th>Hearing/ Mobility</th>
<th>Vision/ Mobility</th>
<th>All Three</th>
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<tbody>
<tr>
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<td>80%</td>
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<td>81%</td>
</tr>
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<tr>
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<tr>
<td>DAB</td>
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<td>25%</td>
<td>26%</td>
<td>26%</td>
<td>20%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859; all disabled: 4,004; multiple-impaired: 698
○○= Statistically significantly different at 95% confidence level, than non-disabled in 2014
><= Statistically significantly higher or lower at 95% confidence level, than 2012
10.4.1 Focus on internet access and connected devices (PCs/laptops, tablets and smartphones)

This section assesses in more detail multiple-impaired consumers’ access to the internet in general, where they access it, how often, and what they use it for. Internet access was based on access anywhere, i.e. both inside and outside the home, including use via mobile devices. We also consider multiple-impaired consumers’ access levels to connected devices in the home, i.e. PCs/laptops, tablets and smartphones, and compare access by age and by socio-economic group.

Five in ten multiple-impaired consumers had access to the internet (anywhere), compared to nine in ten non-disabled consumers

Almost half (49%) of consumers with multiple impairments had access to the internet either inside or outside the home, compared to nearly nine in ten (88%) non-disabled consumers, and both groups had a similar increase since 2012 (up 5pp-8pp) (Figure 96).

While for both groups, access declined with age, within each age group those with a multiple impairment had lower access than non-disabled consumers. The largest gap was seen among those aged 55-64: about six in ten (61%) multiple-impaired consumers had access compared to almost nine in ten (86%) non-disabled consumers.

Within socio-economic groups, access was comparable between the AB, C1 and C2 groups. However, DE multiple-impaired consumers had lower levels of access; around three in ten (31%) compared to almost eight in ten (78%) non-disabled DE consumers.

When comparing multiple impairment groupings to the total multiple-impaired sample, each had comparable access in 2014.
Figure 96 Internet access (anywhere) among multiple-impaired consumers, by age and SEG

Source: British Population Survey, 1 August - 20 November 2014

Base: non-disabled: 15,859, multiple-impaired: 698 non-disabled: 15-34 = 5518, 35-54 = 5065, 55-64 = 2402, 65-74 = 1885, 75+ = 970; multiple-impaired: 15-34 = 27**, 35-54 = 89*, 55-64 = 130, 65-74 = 164, 75+ = 286; non-disabled: AB = 3407, C1 = 5199, C2 = 3836, DE = 3867; multiple-impaired: AB = 102, C1 = 168, C2 = 184, DE = 244

Caution: * indicative sample between 50 and 100; ** sample below 50 therefore not reported

○○= Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

Access to a PC/laptop by multiple-impaired consumers was significantly lower for under-75s than for non-disabled consumers of the same age

Overall, access levels to a PC/laptop in the home were lower for multiple-impaired consumers than for non-disabled consumers, with just over five in ten (54%) having access, versus eight in ten non-disabled (79%) (Figure 97). This disability group was also the least likely to have access to a PC/laptop, among the disability groups reported on, and its access level was unchanged since 2012 (as with non-disabled consumers).

Lower access levels were seen among multiple-impaired than among non-disabled consumers, in all age groups between 35 and 74, each groups having similarly-sized difference (15pp-16pp). Access levels declined with age for both groups; consumers aged 75+ had the lowest level of access, at 39%, comparable to non-disabled consumers in this age group (44%).

Multiple-impaired consumers had lower levels of access to a PC/laptop, across each socio-economic group, compared to non-disabled consumers. The largest gaps were seen in groups C2 (52% vs. 77%) and DE (40% vs. 67%).

When comparing multiple impairment groupings to the total multiple-impaired sample, each had comparable access.
Although access to a tablet computer in the home had increased for multiple-impaired consumers since 2012, it remained lower than for non-disabled consumers

Just over a fifth (23%) of multiple-impaired consumers had access to a tablet computer in the home, an increase of 18pp since 2012 (Figure 98). However, this remained lower than the proportion of non-disabled consumers (42%, an increase of 25pp since 2012). As with access to a PC/laptop, the multiple-impaired group were the least likely of all disability groups to have access to a tablet.

These lower access levels were influenced by the differences seen among consumers aged 35-64: one in four (39%) multiple-impaired consumers aged 35-54 had access to a tablet, compared to one in five (51%) non-disabled consumers, and three in ten (33%) multiple-impaired consumers aged 55-64 had tablet access, compared to four in ten (43%) non-disabled consumers. As with the internet and access to a PC/laptop, access declined with age for both groups.

As seen with PCs/laptops, tablet access levels for multiple-impaired consumers in each socio-economic group were lower than for non-disabled consumers in the same group. The largest gap was among AB consumers: 36% of multiple-impaired AB consumers had access, compared to 57% of non-disabled AB consumers. Access levels declined in line with social class for each group.

Access to a tablet was comparable between each multiple impairment group.
Multiple-impaired consumers were significantly less likely than non-disabled consumers to have access to a smartphone, reflected across each socio-economic group

Multiple-impaired consumers had the lowest levels of all the disability groups of access to a smartphone in the home, and were also lower than non-disabled consumers (29% vs. 66%) (Figure 99). This was despite an increase of 12pp in access for this disability group since 2012, which was a smaller increase than among non-disabled consumers (18pp). This increase of 12pp was driven by increases among consumers with hearing and mobility impairments, and those with all three impairments.

As with non-disabled consumers, access levels declined with age, although notable differences were seen among consumers aged between 35 and 74. The biggest difference was among consumers aged 35-54; three-fifths (60%) of multiple-impaired consumers in this group had access to a smartphone, compared to three-quarters (75%) of non-disabled consumers of the same age.

Across each socio-economic group, consumers with multiple impairments had lower access to a smartphone than non-disabled consumers in the same group. Consumers in DE group had the most marked difference, with a fifth (20%) of multiple-impaired DE consumers having access, compared to three-fifths (59%) of non-disabled DE consumers.
Figure 99  Smartphone access at home among multiple-impaired consumers, by age and SEG

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859, multiple-impaired: 698
non-disabled: 15-34 = 5518, 35-54 = 5065, 55-64 = 1885, 75+ = 970; multiple-impaired: 15-34 = 27**, 35-54 = 89*, 55-64 = 130, 65-74 = 164, 75+ = 286;
Caution: * indicative sample between 50 and 100; ** sample below 50 therefore not reported

Accessing the internet via a mobile device had almost doubled since 2012 for multiple-impaired consumers, influenced by increased access to smartphones

Since 2012, accessing the internet via a mobile device, among consumers with multiple impairments, had risen by 13pp (to 31%) (Figure 100). This is likely to due to the overall increase in access to a smartphone among this group (up 12pp to 29%).

But these levels remain lower than for non-disabled consumers, who had a 24pp increase (to 59%) in accessing the internet via a mobile device, influenced by their higher levels of access to a smartphone (66%).

Accessing the internet in ‘other’ locations, such as at work, place of study, or a public place (such as an internet café or library) was also lower for multiple-impaired consumers than for non-disabled consumers (17% vs. 38%). Multiple-impaired consumers’ access in other locations was unchanged since 2012, whereas among non-disabled consumers it was up by 2pp.

The majority (93%) of both multiple-impaired and non-disabled consumers accessed the internet at home (via a PC, TV or games console). Non-disabled consumers’ levels of access at home were down by 3pp since 2012, whereas multiple-impaired consumers’ were unchanged.

When comparing multiple impairment groups to the total multiple impairment sample, each group had levels of type of internet access comparable with the total sample.
Multiple-impaired consumers were significantly more likely than non-disabled consumers to access the internet on a less frequent basis

Among consumers who had access to the internet, just over half (54%) of multiple-impaired consumers accessed it several times a day, compared to three-quarters (76%) of non-disabled consumers (Figure 101). This was an increase of 10pp for both groups since 2012.

Accessing the internet once a day was comparable between multiple-impaired and non-disabled consumers. However, less frequent access (from once a week to several times a week) was more likely for multiple-impaired consumers (6%-9%) than for non-disabled consumers (2%-4%). In this measure, multiple-impaired consumers were unchanged since 2012.

Among the multiple impairment groups, level of frequency was comparable to the total multiple impairment sample.
Multiple-impaired consumers were significantly less likely than non-disabled consumers to use the internet for most activities

As with non-disabled consumers, using the internet for communications (such as email, VoIP, and social networking) and obtaining information (on interests and products) were the most popular uses among multiple-impaired consumers (Figure 102). However, when compared to non-disabled consumers, levels of use were lower for this disability group – communications 87% (5pp decrease since 2012) vs. 96%, and information 84% vs. 88%.

Online shopping was also popular with this disability group; six in ten (61%) used the internet for this purpose. However, this was lower than the proportion of non-disabled consumers (71%) doing so.

A lower proportion of multiple-impaired consumers used the internet for audio-visual content, with just over a third (35%) doing so – an increase of 10pp since 2012. Despite this increase, this disability group remained less likely than non-disabled consumers to use the internet for this activity (49%).

Gaming was the only activity with similar levels of use in both groups (21% each). However, there was an increase of 8pp since 2012 in the proportion of multiple-impaired consumers saying they used the internet for this purpose.

When comparing multiple impairment groups to the total multiple impairment sample, each group had levels of internet activities comparable with the total sample.
10.4.2 Focus on telecoms access (landline and any type of mobile phone)

This section assesses in more detail multiple-impaired consumers’ access to landline and any mobile phones in the home, and compares access by age and socio-economic group. ‘Any’ mobile phones within the survey include both simple and smartphones; although a focus on smartphones is included in sub-section 10.4.1 (Internet and connected devices).

Multiple-impaired consumers were significantly more likely than non-disabled consumers to have access to a landline, reflected across each socio-economic group

More than eight in ten (82%) multiple-impaired consumers had access to a landline in the home, higher than the proportion of non-disabled consumers (72%) (Figure 103). This disability group had no change in access levels since 2012, although non-disabled consumers had a decrease of 2pp.

Among those aged 75+, those with multiple impairments had higher access than non-disabled consumers (90% vs. 84%). However, in contrast, those aged 35-54 with multiple impairments had lower levels of access than non-disabled consumers of the same age (65% vs. 76%).

Within the multiple-impaired sample, each socio-economic group had higher levels of access to a landline than non-disabled consumers in the same group. The largest differences were in groups C2 and DE, which both had a 14pp difference to non-disabled consumers (85% vs. 71%, and 70% vs. 61% respectively).

When comparing multiple impairment groups to the total multiple impairment sample, each group had levels of access to a landline in the home comparable with the total sample.
A majority of multiple-impaired consumers had access to any mobile phone in the home, but this was lower than the proportion of non-disabled consumers

In contrast to landline access levels, access to a mobile phone (simple or smartphone) in the home was lower for multiple-impaired consumers than for non-disabled consumers (82% vs. 89%) (Figure 104). This was despite the fact that the 7pp increase since 2012 among this disability group was higher than the 2pp increase among non-disabled consumers since 2012. This was driven principally by an increase in access among consumers with both visual and mobility impairments.

Unlike the other disability groups, which had higher levels of mobile phone access than landline access, multiple-impaired consumers had similar levels of landline and mobile phone access.

Each age group within this disability group had levels of mobile phone access comparable to non-disabled consumers, with access lowest for the eldest age group (75+) at around seven in ten.

Differences were seen among C2 and DE consumers, with eight in ten (81%) C2 consumers having access to a mobile phone, compared to nine in ten (90%) non-disabled C2 consumers. A larger gap was seen among DE consumers, with just over seven in ten (74%) mobility-impaired consumers having access, compared to almost nine in ten (87%) non-disabled consumers.

When comparing multiple impairment groups to the total multiple impairment sample, each group had levels of access to a mobile phone in the home comparable with the total sample.
Figure 104 Mobile phone access (any type) at home among multiple-impaired consumers, by age and SEG

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859, multiple-impaired: 698 non-disabled: 15-34 = 5518, 35-54 = 5065, 55-64 = 2402, 65-74 = 1885, 75+ = 970; multiple-impaired: 15-34 = 27**, 35-54 = 89*, 55-64 = 130, 65-74 = 164, 75+ = 286; non-disabled: AB = 3407, C1 = 3386, DE = 3867; multiple-impaired: AB = 102, C1 = 168, C2 = 184, DE = 244

Caution: * indicative sample between 50 and 100; ** sample below 50 therefore not reported

10.4.3 Focus on broadcast access (TV and radio)

This section assesses in more detail multiple-impaired consumers’ access to pay-TV services (satellite/cable), free-to-air TV services (Freeview/Freesat), and a DAB radio in the home, comparing access levels by age and socio-economic group.

Access to a pay-TV service in the home was less likely for less affluent multiple-impaired consumers than for non-disabled consumers with the same profile

Access to a pay-TV (satellite/cable) service in the home was lower among multiple-impaired consumers (46%) than among non-disabled consumers (55%), although neither group’s access level had changed since 2012 (Figure 105).

These lower access levels were driven by multiple-impaired consumers in socio-economic groups C1, C2 and DE. A similar gap was seen among each (7pp-11pp), with DE consumers having the lowest levels of access (44% vs. 51%).

Each age group had comparable levels of access between this disability group and non-disabled consumers, with access declining with age for both groups.

When comparing multiple impairment groups to the total multiple impairment sample, each group had levels of access to a pay-TV service in the home comparable to the total sample.
Figure 105 Pay-TV access at home among multiple-impaired consumers, by age and SEG

Access to a free-to-air TV service in the home was significantly higher for multiple-impaired consumers than for non-disabled consumers

In contrast to pay-TV access levels, access to a free-to-air (Freeview/Freesat) TV service in the home was higher for multiple-impaired consumers (65%) than for non-disabled consumers (50%) (Figure 106). This disability group’s access level was unchanged since 2012, while non-disabled consumers’ access was down by 3pp.

Within age groups, differences were seen among the 35-64 age groups. Two-thirds (64%) of multiple-impaired consumers aged 35-54 had access to a free-to-air TV service, compared to under half (47%) of non-disabled consumers of the same age. A similar difference was seen among consumers aged 55-64: two-thirds (66%) of multiple-impaired consumers versus over half (55%) of non-disabled consumers.

Within the multiple-impaired sample, each socio-economic group had higher levels of access than non-disabled consumers in the same group. The largest difference was among C2 consumers; three-quarters (73%) of C2 multiple-impaired consumers had access, compared to half (51%) of C2 non-disabled consumers.

When comparing multiple impairment groups to the total multiple impairment sample, each group had levels of access to a free-to-air TV service in the home comparable with the total sample.
Increased levels of access to a DAB radio brought multiple-impaired consumers into line with non-disabled consumers

An increase of 6pp in access to a DAB radio in the home among those with multiple impairments brought their access levels up to the level of non-disabled consumers in 2014 (25% vs. 26%) (Figure 107). This increase among the multiple-impaired group was due to an increase among consumers with both hearing and mobility impairments since 2012.

Within age groups, the only significant difference to non-disabled consumers was among those aged 65-74. Around a quarter (26%) of multiple-impaired consumers in this age group had access, compared to over two-thirds (36%) of non-disabled consumers.

There were no significant differences in access levels by socio-economic group.

When comparing multiple impairment groups to the total multiple impairment sample, each group had levels of access to a DAB radio in the home comparable with the total sample.

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859, multiple-impaired: 698  non-disabled: 15-34 = 5518, 35-54 = 5065, 55-64 = 2402, 65-74 = 1885, 75+ = 970; multiple-impaired: 15-34 = 27*, 35-54 = 89*, 55-64 = 130, 65-74 = 164, 75+ = 286; non-disabled: AB = 3407, C1 = 5199, C2 = 3366, DE = 3867; multiple-impaired: AB = 102, C1 = 168, C2 = 184, DE = 244
Caution: * indicative sample between 50 and 100; ** sample below 50 therefore not reported
○O= Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)
**Figure 107** DAB radio access at home among multiple-impaired consumers, by age and SEG

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859, multiple-impaired: 698
non-disabled: 15-34 = 5518, 35-54 = 5065, 55-64 = 2402, 65-74 = 1885, 75+ = 970; multiple-impaired: 15-34 = 27**, 35-54 = 89*, 55-64 = 130, 65-74 = 164, 75+ = 286;
non-disabled: AB = 3407, C1 = 5199, C2 = 3386, DE = 3867; multiple-impaired: AB = 102, C1 = 168, C2 = 184, DE = 244
Caution: * indicative sample between 50 and 100; ** sample below 50 therefore not reported

Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

### 10.5 Personal use of devices and services

This is a new section in the report, and focuses on personal use of communication devices and services among multiple-impaired consumers.

**Multiple-impaired consumers had significantly lower levels of personal use, compared to access levels, for most of the reported devices and services**

As with each disability group, the proportion of multiple-impaired consumers who personally used a device or service was lower than the proportion with access to that device/service in the home (Figure 108).

Levels of personal use of both landlines and any type of mobile phones were lower than levels of access for multiple-impaired consumers. The gap between access and use was largest for mobile phones, at 15pp (82% vs. 67%), while the difference between access and use for a landline was smaller at 8pp (82% vs. 74%). As multiple-impaired consumers were more likely than non-disabled consumers to have access to a landline (72%), these lower levels of personal use may be due in part to their disability.

Personal uses of the main paid-for and free-to-air TV services were also lower than levels of access for multiple-impaired consumers. Freeview services had the largest gap in this

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35 For the purposes of comparing access to personal use, PC/laptop as a device was excluded and TV was split by platform – to reflect the structure of the survey
36 Non-disabled consumers were not asked about their personal use of devices and services within the survey, therefore comparison cannot be made between these and disabled consumers
category: 7pp (54% vs. 61%), while satellite TV had a smaller gap; 5pp (28% vs. 33%). As with a landline, multiple-impaired consumers were more likely than non-disabled consumers to have access to a free-to-air TV service (60% vs. 50%), which suggests that their disability may have played a part in their low level of use of this service.

Although multiple-impaired consumers' personal use of a tablet was 5pp lower than access to a tablet (18% vs. 23%), use and access levels to the internet were comparable, suggesting that the tablet as a device (and not the internet as a service) was impeding these consumers' use of tablets, and their disability may have been a contributory factor.

This disability group had a difference of 6pp between use of and access to a DAB radio (19% vs. 25%).

**Figure 108 Access compared to personal use of devices/services among multiple-impaired consumers**

Compared to the average for all disabled consumers, multiple-impaired consumers were less likely to personally use a mobile phone, the internet or a tablet computer

Multiple-impaired consumers were significantly less likely to use any type of mobile phone (67%), the internet (96%) or a tablet (18%) than disabled consumers overall (72%, 98% and 23% respectively) (Figure 109).

In contrast, they were more likely than the average for all disabled consumers to personally use a landline, although they had comparable levels of access. Use of a Freeview TV service was also more likely among this disability group, reflecting their high access levels among all the disability groups reported on.
10.6 Stated limitations of use of devices/services due to disability

This is a new section in the report, which aims to help us further understand whether lower access levels or use of communication devices and services are limited by consumers’ disabilities. To inform this analysis, the survey asked whether disabled consumers considered this to be the case.

**Multiple-impaired consumers said their disability least limited their use of the internet and computing devices, compared to other devices/services**

Overall, a quarter (25%) of multiple-impaired consumers said that their disability limited or prevented their use of any of the communication devices and services, comparable with the average for disabled consumers.

Multiple-impaired consumers said that their disability limited or prevented their use of the internet, PCs/laptops and a tablet, but that these were the least limited by their disability (6%-8%) compared to the other devices and services (11%-12%) (Figure 110). However, among this disability group the tablet was the device with the highest proportion of non-users (5%) due, in part, to their disability.

Use of a PC/laptop was limited to a lesser degree. Five per cent said they used a PC/laptop despite its use being limited by their disability, suggesting that 3% of PC/laptop non-users in this disability group did not use these devices partly due to their disability.

One in ten (11%) multiple-impaired consumers said their use of a TV was limited or prevented by their impairments. However, 10% of this disability group said they used a TV, even though its use was limited by their disability, meaning that a small proportion (1%) of multiple-impaired consumers did not use a TV due to their disability.

Similar proportions of multiple-impaired consumers said their impairments limited or prevented their use of telecoms devices. Around one in ten (11% mobile, 12% landline) felt their disability limited their use of these devices. Just under one in ten said they used them, despite their use being limited (8% mobile, 9% landline), suggesting that 3% of multiple-
impaired consumers did not use a mobile or landline, and that their disability was a factor in this.

**Figure 110 Multiple-impaired consumers, impact of disability on use of devices**

<table>
<thead>
<tr>
<th>MULTIPLE IMPAIRMENTS</th>
<th>% who feel their disability limits/prevents use of device/service</th>
<th>% who personally use device/service (but use is impacted by disability)</th>
<th>% who do not use device/service (use impacted by disability)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landline</td>
<td>12%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Mobile</td>
<td>11%</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>Internet*</td>
<td>7%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>PC/laptop</td>
<td>8%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Tablet</td>
<td>6%</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>TV</td>
<td>11%</td>
<td>10%</td>
<td>1%</td>
</tr>
</tbody>
</table>

*Source: British Population Survey, 1 August - 20 November 2014
Base: multiple-impaired: 698
* Personal use of the internet is defined by those who use the internet at least once a month; other devices and services were specifically asked about if the respondent personally used them
Section 11

Consumers with a learning disability

11.1 Introduction

This section assesses the position of consumers with a learning disability (only) in more detail. It details the services and devices that they have access to in the home, their use of these, and any limitations felt in using them. It also provides more information on the impact of demographics and other factors.

Consumers with learning disabilities accounted for 5% of the total sample of disabled consumers. Due to the low sample size of consumers with learning disabilities, certain analyses cannot be presented, such as splits by age and socio-economic group.37

11.2 Key trends

- **Seven in ten (73%) consumers with a learning disability had access to the internet (anywhere), compared to nine in ten (88%) non-disabled consumers.** The lower level of access to connected devices, such as PCs/laptops and smartphones, explains some of the difference in levels of access to the internet, as well as the stated impact of their disability on their use of the internet and these devices.

- **Access to a PC/laptop or smartphone was significantly lower for consumers with a learning disability than for non-disabled consumers.** Seven in ten (68%) had access to a PC/laptop, compared to eight in ten (79%) non-disabled consumers, and almost six in ten (57%) had access to a smartphone, compared to 66% of non-disabled consumers.

- **There were similar levels of access to a tablet between consumers with a learning disability and non-disabled consumers.** Two-fifths (41%) had access to a tablet, comparable to 42% of non-disabled consumers. Compared to all disabled consumers, those with a learning disability were more likely to personally use a tablet (31% vs. 23%), a reflection of the younger age profile of this disability group.

- **Consumers with a learning disability were significantly more likely than non-disabled consumers to use the internet for gaming.** Almost a third (31%) used the internet for gaming activities, compared to a fifth (21%) of non-disabled consumers. Consumers with a learning disability were also more likely than non-disabled consumers to have access to a games console (40% vs. 32%). Both these factors are a reflection of their younger age profile.

Three in ten consumers with a learning disability said their disability limited their use of communication services and devices. These consumers were less likely to say that their disability limited their use of a landline, a mobile phone or the TV (9%-11% stating this) compared to their use of other devices (13%-18%). Use of a tablet was the most limited by a consumer’s learning disability, with 11% saying they did not use a tablet, as factors including their disability prevented this.

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37 The 2014 survey achieved a total of 199 respondents with a learning disability
11.3 Profile

Consumers with learning disabilities had a younger age profile than non-disabled consumers, with close to half of this disability group aged 15-34.

Consumers with learning disabilities were more likely to be under 35 years old (45%) than non-disabled consumers (35%) (Figure 111). All other age groups were comparable to non-disabled consumers.

![Age profile of consumers with a learning disability](image)

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859; learning disability: 199

○○ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

Consumers with learning disabilities were significantly more likely than non-disabled consumers to be in DE socio-economic group

Almost half (45%) of the consumers with learning disabilities were in socio-economic group DE, compared to a quarter (24%) of non-disabled consumers (Figure 112). In contrast, consumers with learning disabilities were less likely than non-disabled consumers to be in the ABC1 socio-economic groups (32% vs. 54%).

Due to the smaller sample sizes achieved for this disability group, it is not possible to analyse by combined age and socio-economic profile.
A quarter of consumers with learning disabilities were in employment, compared to over half the population of non-disabled consumers

Around a quarter (26%) of consumers with learning disabilities were in employment, compared to over half (56%) of non-disabled consumers (Figure 113).

Over a third (35%) were in other forms of working status, such as being a student, unemployed, a homeworker, or not in paid work (‘other’ within Figure 113). This compared to around a fifth (22%) of non-disabled consumers.

Around a quarter (23%) of consumers with learning disabilities stated they did not work due to their illness or disability.
Consumers with learning disabilities were significantly more likely than non-disabled consumers to live alone

A quarter (25%) of consumers with learning disabilities said they lived alone, compared to less than a fifth (16%) of non-disabled consumers (Figure 114). Consequently, they were less likely than non-disabled consumers to be living in a larger household; over two-fifths (42%) lived in a household of three or more people, compared to half (51%) of non-disabled consumers.
11.4 Access to devices and services: overview

Consumers with learning disabilities were significantly less likely than non-disabled consumers to have access to the internet and connected devices in the home

Figure 115 provides a summary of levels of access to key devices and services, comparing those with a learning disability, all disabled, and non-disabled consumers.

There were similar levels of access in the home among those with a learning disability and non-disabled consumers to landline telephony, any type of mobile phone, a tablet, pay TV and a DAB radio.

Consumers with a learning disability were less likely than non-disabled consumers to have access to the internet (73% vs. 88%), a PC/laptop (68% vs. 79%) or a smartphone (57% vs. 66%). However, they more likely than the average for disabled consumers to have access to a smartphone (41%), which may be a reflection of the younger profile of this disability group.

Those with a learning disability were more likely than the non-disabled group to have access to free-to-air TV (60% vs. 50%) or a games console (40% vs. 32%) – the latter again being a reflection of their younger profile.

Due to the low sample size achieved within the survey for this disability group, access among each device/service cannot be further analysed by age and/or socio-economic group.

**Figure 115** Access to devices and services among consumers with a learning disability

<table>
<thead>
<tr>
<th></th>
<th>Non-disabled</th>
<th>All disabled</th>
<th>Learning disability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landline</td>
<td>72%</td>
<td>77%</td>
<td>66%</td>
</tr>
<tr>
<td>Any mobile</td>
<td>89%</td>
<td>85%</td>
<td>87%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>66%</td>
<td>41%</td>
<td>57%</td>
</tr>
<tr>
<td>PC/laptop</td>
<td>79%</td>
<td>64%</td>
<td>68%</td>
</tr>
<tr>
<td>Internet access</td>
<td>88%</td>
<td>65%</td>
<td>73%</td>
</tr>
<tr>
<td>Tablet</td>
<td>42%</td>
<td>30%</td>
<td>41%</td>
</tr>
<tr>
<td>Games console</td>
<td>32%</td>
<td>21%</td>
<td>40%</td>
</tr>
<tr>
<td>Pay-TV</td>
<td>55%</td>
<td>48%</td>
<td>56%</td>
</tr>
<tr>
<td>Free-to-air TV</td>
<td>50%</td>
<td>60%</td>
<td>60%</td>
</tr>
<tr>
<td>DAB</td>
<td>26%</td>
<td>25%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August – 20 November 2014
Base: non-disabled: 15,859; learning disability: 199

○○ = Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)
11.4.1 Focus on internet access

This section looks in more detail at consumers with learning disabilities and their access to the internet in general: where they access it, how often, and what they use it for. Internet access was based on access anywhere, i.e. both inside and outside the home, including use via mobile devices.

Unlike the other disability sections in this report, deeper analysis of access by age and socio-economic group cannot be provided, due to the low sample size achieved within the survey for this disability group. Our focus is therefore on internet access overall.

Consumers with learning disabilities were significantly less likely than non-disabled consumers to have access to the internet (anywhere)

Around three-quarters (73%) of consumers with learning disabilities had access to the internet (at home or elsewhere), compared to 88% of non-disabled consumers (Figure 116). As this disability group had a younger profile than non-disabled consumers, this suggests that age was not a factor in the lower levels of access to the internet.

![Figure 116 Internet access (anywhere) among consumers with a learning disability](image)

Source: British Population Survey, 1 August - 20 November 2014
Base: non-disabled: 15,859, learning disability: 199
○○= Statistically significantly higher or lower, at 95% confidence level, than non-disabled (red = lower, green = higher)

Consumers with learning disabilities were significantly less likely than non-disabled consumers to access the internet at home

Almost nine in ten (88%) consumers with learning disabilities accessed the internet while at home, compared to over nine in ten (93%) non-disabled consumers (Figure 117).

The proportion of those accessing the internet outside the home, such as at work, place of study, or in a public place (such as an internet café or library) was comparable between those with a learning disability and non-disabled consumers (34% vs. 38%).

Six in ten (60%) consumers with learning disabilities reported accessing the internet via their mobile device; similar to the proportion of non-disabled consumers (59%). These consumers were also the only disability group to have levels of smartphone access (57%) comparable with non-disabled consumers (66%) – a reflection of their younger age profile.
Consumers with learning disabilities were significantly less likely than non-disabled consumers to access the internet several times a day

Around seven in ten (69%) consumers with learning disabilities accessed the internet several times a day, compared to three-quarters (76%) of non-disabled consumers (76%) (Figure 118). There were no other differences between the two groups in terms of accessing the internet once a day or less frequently.
Consumers with learning disabilities were significantly more likely than non-disabled consumers to use the internet for gaming

Consumers with learning disabilities were less likely to undertake various activities on the internet, compared to non-disabled consumers (Figure 119): communications (91% vs. 96%), obtaining information (82% vs. 88%) and shopping (63% vs. 71%).

However, this disability group was more likely than non-disabled consumers to use the internet for gaming (31% vs. 21%); they were also the disability group most likely to do this activity. This is a reflection of this group being more likely than non-disabled consumers to have access to a games console (40% vs. 32%), and its younger age profile.
11.5 Personal use of devices and services

This is a new section in the report, and focuses on personal use of communication devices and services among consumers with a learning disability.

Consumers with learning disabilities had significantly lower levels of personal use, compared to access levels, of telecoms devices and a tablet

As with each disability group, the proportion of consumers with learning disabilities who personally used a device\(^{38}\) or service was lower than the proportion who had access to that device/service in the home\(^{39}\) (Figure 120).

Levels of personal use of landlines and any type of mobile phones were lower than levels of access, for consumers with a learning disability. The landline was the device with the largest gap between access and use, at 13pp (66% vs. 53%), although this might be partly due to the younger age profile of this disability group (younger people are generally less likely to have a landline). The difference between access and use of a mobile phone was smaller at 10pp (87% vs. 77%).

Consumers with learning disabilities also had a gap of 10pp between access and personal use of a tablet (41% vs. 31%). Access to this device was comparable to non-disabled consumers (41% vs. 42%), therefore the lower proportion using a tablet (31%) indicates that perhaps their disability limited their use.

Personal use of the internet, a DAB radio, and the TV services were comparable to access levels for this disability group, suggesting that disability did not impact use of these devices/services.

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\(^{38}\) For the purposes of comparing access to personal use, PC/laptop as a device was excluded and TV was split by platform to reflect the structure of the survey

\(^{39}\) Non-disabled consumers were not asked about their personal use of devices and services within the survey, therefore comparison cannot be made between these and disabled consumers
Figure 120 Access compared to personal use of devices/services among consumers with a learning disability

Source: British Population Survey, 1 August - 20 November 2014
Base: learning disability: 199
* Personal use of the internet is defined by those who use the internet at least once a month; other devices and services were specifically asked about if the respondent personally used them
\( \circ \) Notes whether personal use levels of each device/service for consumers with a learning disability were statistically significantly lower than access levels of that device/service

Compared to the average for disabled consumers, those with a learning disability were more likely to personally use a tablet, and less likely to use a landline

When compared to the average for all disabled consumers, consumers with a learning disability were less likely to use a landline (53% vs. 68%), and more likely to use a tablet (31% vs. 23%). Both of these may be partly due to their younger age profile, and not solely a result of their disability (Figure 121).
11.6 Stated limitations of use of devices/services due to disability

This is a new section in the report which aims to help us further understand whether lower levels of access, or use of communication devices and services, were limited by consumers’ disabilities. To inform this analysis, the survey asked whether disabled consumers considered this to be the case.

Overall, three in ten consumers with learning disabilities felt that their disability limited their use of devices and services, significantly higher than the average for all disabled consumers

Overall, three in ten (30%) consumers with learning disabilities felt that their disability limited their use of devices and services, significantly higher than the average for all disabled consumers (22%).

Although the proportion of consumers with a learning disability who used the internet (73%) matched the proportion with access, almost a fifth (18%) of this group said their disability limited or prevented their use of this service (Figure 122).

Computing devices closely followed, as the devices whose use learning-disabled consumers felt was limited by their disability (PC/laptop 15%, tablet 13%). A minority of these consumers (2%) said they personally used a tablet, although its use was limited by their disability, while 11% said their disability was a factor in their non-use of this device. Non-use of a PC/laptop was less affected, with 5% saying they did not use this device in part due to their disability.

Use of a landline or a TV were the least limited for this disability group (9% and 10% respectively), with non-use of a TV lowest (1%) for this group.
**Figure 122 Consumers with a learning disability, impact of disability on use of devices**

<table>
<thead>
<tr>
<th>LEARNING DISABILITY</th>
<th>% who feel their disability limits/prevents use of device/service</th>
<th>% who personally use device/service (but use is impacted by disability)</th>
<th>% who do not use device/service (use impacted by disability)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landline</td>
<td>9%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Mobile</td>
<td>11%</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>Internet*</td>
<td>18%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>PC/laptop</td>
<td>15%</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>Tablet</td>
<td>13%</td>
<td>2%</td>
<td>11%</td>
</tr>
<tr>
<td>TV</td>
<td>10%</td>
<td>9%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: British Population Survey, 1 August - 20 November 2014

Base: learning disability: 199

* Personal use of the internet is defined by those who use the internet at least once a month; other devices and services were specifically asked about if the respondent personally used them
Annex 1: BPS-relevant questions

Demographics

- Gender: *male; female*
- Age: 15-17; 18-24; 25-34; 35-44; 45-54; 54-64, 65+
- Number in household including respondent and any children: 1; 2; 3; 4; 5+
- Social grade: A, B, C1, C2, D, E
- Working status: *employed (broken by hours worked and self-employed); student/still at school; unemployed and seeking work; retired; not in paid work – other; long term illness or disability, housewife*
- Area: *urban; suburban; rural*
- Region/nation: North England; Midlands; South England; London; total England; Wales; Scotland

Device/service access

- Does your household have …
  - Television set(s) in household? *Yes/No*
  - Satellite TV, e.g. Sky Digital (i.e. TV through a satellite dish that you pay a monthly subscription for)? *Yes/No*
  - Cable TV, e.g. Virgin Media i.e. TV through a cable connection that you pay a monthly subscription for)? *Yes/No*
  - Freeview (i.e. digital TV accessed through a set-top box, or integrated into your TV, that you do not have to pay a subscription for)? *Yes/No*
  - Freesat (i.e. TV through a satellite dish with no monthly subscription, just a one-off payment)? *Yes/No*
  - Telephone (landline, i.e. NOT a mobile phone) in household? *Yes/No*
  - Simple mobile phone in household? *Yes/No*
  - Web-enabled mobile phone (e.g. iPhone, Blackberry, Android) in household? *Yes/No*
  - Personal computer (PC, MAC or other type of home computer)/ Desktop PC in household? *Yes/No*
  - Tablet PC such as an iPad or similar? *Yes/No*
  - Does your household have a DAB radio? *Yes/No*
Internet use

- Which of these best describes your frequency of use of the internet?
  - Several times a day; around once a day; 4 or 5 times a week; 2 or 3 times a week; around once a week; 2 or 3 times a month; around once a month; less than once a month; never but I have access; never and I do not have access.

- For how long have you had access to the internet?
  - Less than 3 months; between 3 and 6 months; between 6 and 12 months; between 1 and 2 years; between 2 and 3 years; between 3 and 4 years; between 4 and 5 years; between 5 and 6 years; more than 6 years; don’t know

- How do you access the internet?
  - Via personal computer or laptop at home; via personal computer or laptop at work/university/school; via convenient public place of access - e.g. internet café, library, etc.; via mobile terminal (e.g. mobile telephone, PDA, Palm, Blackberry); via TV set (through digital cable); via games console (e.g. Nintendo Wii, Sony PSP, PSP 2, PSP 3, Xbox 360); No access

- In the last 3 months, have you used the internet for:
  - Sending/receiving emails; information on hobbies and personal interests; information on products/services; online grocery shopping; other online shopping (not groceries); online banking; job searching; playing games online; online gambling; downloading/streaming music, downloading/streaming movies; downloading/streaming TV programmes; online dating; VoIP; social networking; other?

Limitations

Which of these, if any, limit your daily activities or the work you can do?

- Poor hearing, partial hearing
- Deaf
- Poor vision, partial sight
- Blind
- Cannot walk at all/ use a wheelchair
- Cannot walk very far or manage stairs or can only do so with difficulty
- Limited ability to reach
- A learning disability
- Other illnesses/ health problems which limit your daily activities/ work you can do

Does your disability limit or prevent you using any of the following services or devices?

- Fixed-line telephone
- Mobile phone
- Internet
- PC/ laptop
- Tablet computer
- Television
Personal use

Of the following which you have in your household, which, if any, do you personally use?

- TV
- Satellite TV – digital
- Cable TV – digital
- Digital TV via aerial/Freeview
- Mobile phone
- Telephone
- DAB digital radio
- Personal computer/desktop PC (PC, MAC or other type of home computer)
- Laptop
- Freesat (i.e. TV through a satellite dish with no monthly subscription, just a one-off payment)
- Web-enabled mobile phone
- Tablet PC (iPad or similar)

Severity of disability

Showcard:
A. Poor hearing, partial hearing
B. Deaf
C. Poor vision, partial sight
D. Blind
E. Cannot walk at all/ use a wheelchair
F. Cannot walk very far, or manage stairs, or can only do so with difficulty
G. Limited ability to reach
H. A learning disability
I. Other illnesses/ health problems which limit your daily activities/ work you can do

Details of the full questionnaire can be found here:

http://www.bpomni.co.uk/disability-impact-2014/4588760334
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