

Use of communication services, consumer omnibus 2020

Focus on people with impacting and/or limiting conditions

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Impact of Covid-19 on the research

In 2020, we commissioned Kantar Media to conduct Ofcom's Disability Consumer Research via their face-to-face omnibus. We were due to run the survey for 10 waves to gain sufficient sample to be able to look at household access to and personal use of communications devices and services, making comparisons between those with and without impacting or limiting conditions and drawing out the differences between conditions.

However due to the Covid-19 pandemic restrictions on face-to-face fieldwork we were only able to complete two waves of the survey. This meant that we have not been able to make comparisons between different conditions or look at different attributes such as age or socio-economic group within each of the different conditions as we have done in previous research.

Due to the lower sample sizes, we have only made comparison between those with and without any conditions that impact or limit their use of communications services.

In 2022, we are aiming to resume the research with a large enough sample to allow us to robustly look at differences between conditions and within each condition to better understand the impact any demographic differences have on people's access and use of communications services.

Key points

People with a condition that limits or impacts their daily activity or the work they can do are more likely to be older than those without such conditions.

Of those with limiting/impacting conditions, 38% are over 65, compared to 15% of people without such conditions. Reflective of this age skew, those with an impacting/limiting condition are more likely to be retired.

Household ownership of computers, games consoles, smartphones and smart TVs is less likely for people with an impacting/limiting condition compared to people without. However, they are more likely to own a landline phone or a mobile that is not a smartphone.

Personal use of the internet is less likely for people with an impacting or limiting condition compared to those without. They are less likely to use the internet at home, on a mobile device, and in a work setting, and less likely to do the majority of internet activities (such as seeking information, online shopping and communicating) that we asked about.

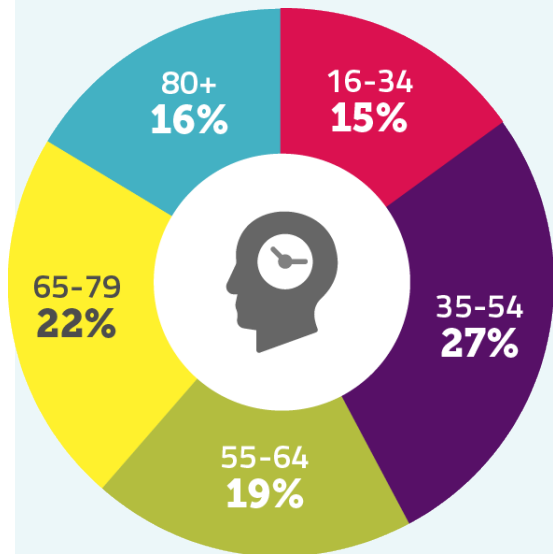
People with an impacting/limiting condition are more likely than those without to be the sole decision maker for choice of broadband service provider. However, they are less likely to be a joint decision maker.

Sample profile

Summary

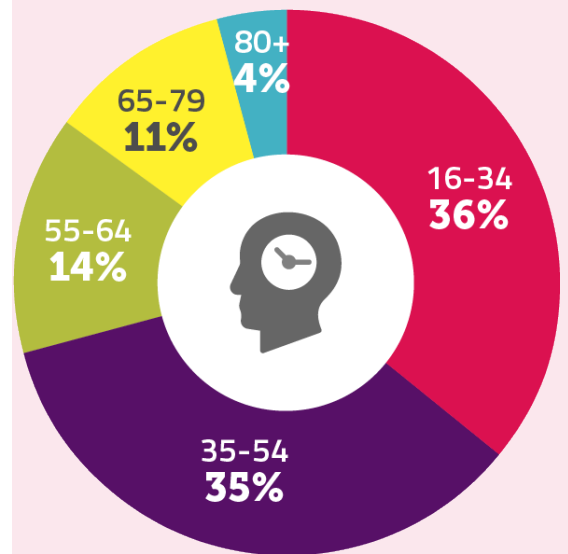
Of all the people that we interviewed who had a condition that impacts or limits their daily activity or work they can do, 22% are aged 65-79, compared to 11% of people without any conditions. Sixteen per cent of those with an impacting/limiting condition were over 80, compared to 4% of those without. In line with this older age profile, people with an impacting/limiting condition are less likely than those without to be employed or in education and more likely to be unemployed or retired.

With any limiting or impacting conditions

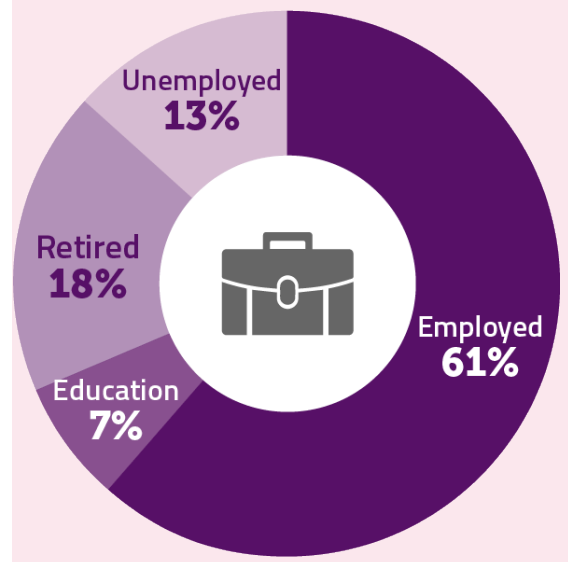
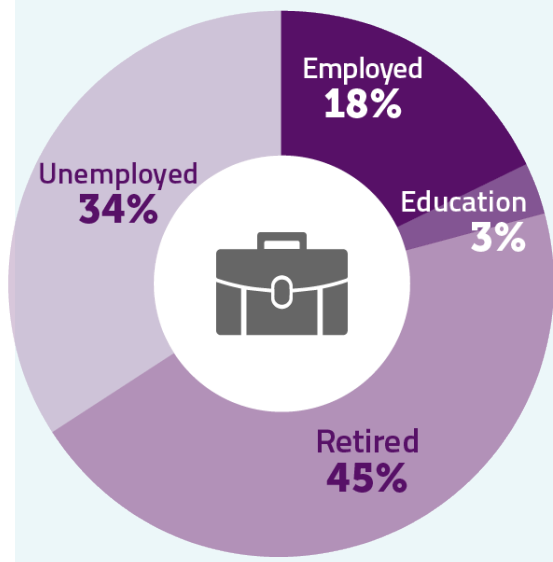


Age profile

Without any limiting or impacting conditions



Working status



Household ownership

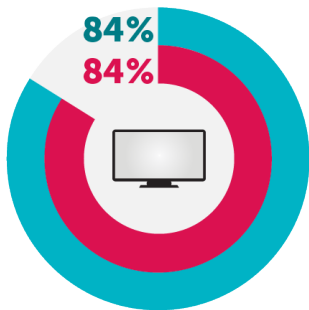
Summary

People with an impacting/limiting condition are more likely than those without a condition to have a landline phone or a mobile phone that is not a smartphone in their household. However, in contrast, they are less likely to own a computer (including PCs, laptops and tablets), games console, smartphones or smart TV.

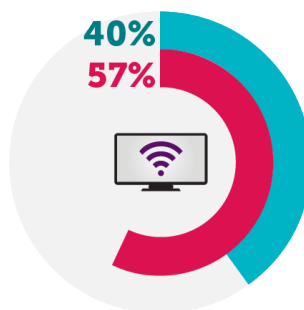
The biggest difference in household ownership levels between those with and without an impacting/limiting condition is smartphone ownership (86% of those without any conditions have a smartphone in their household compared to 64% of people with an impacting/limiting condition).

 = With any limiting/impacting conditions
 = Without any limiting / impacting conditions

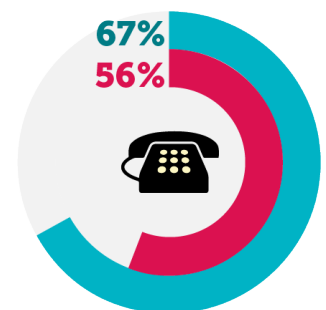
Television



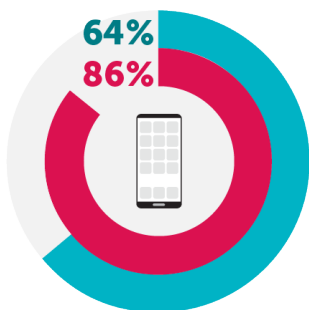
Smart TV



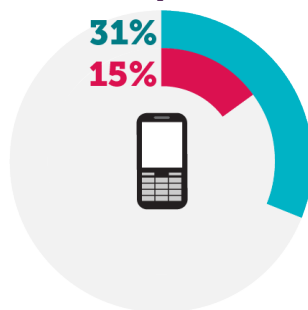
Landline



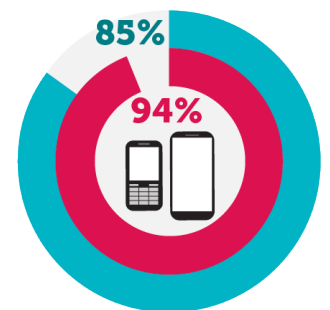
Smartphone



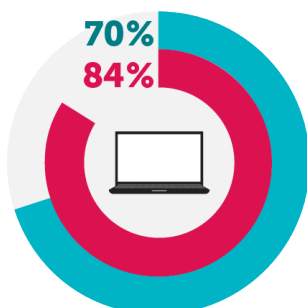
Mobile phone (not smartphone)



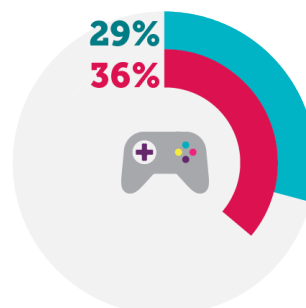
Any mobile phone



Computer (including tablet)



Games console



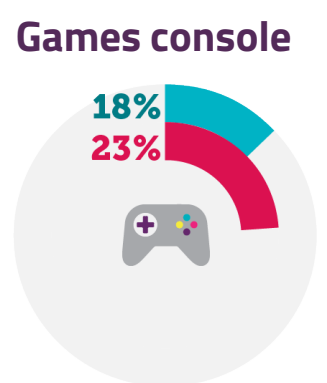
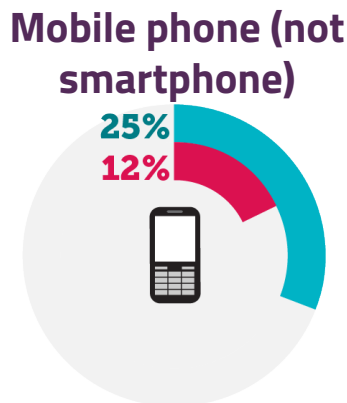
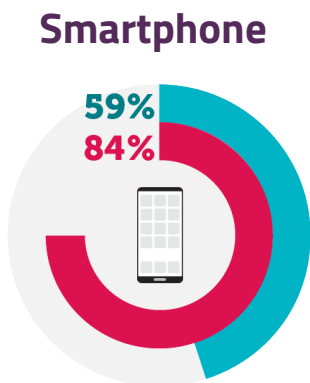
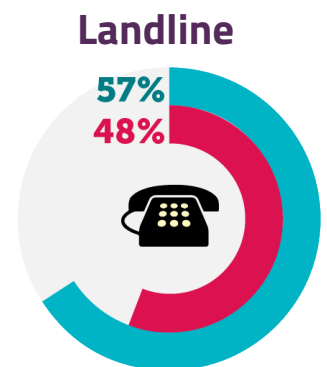
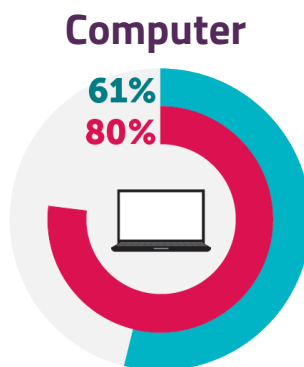
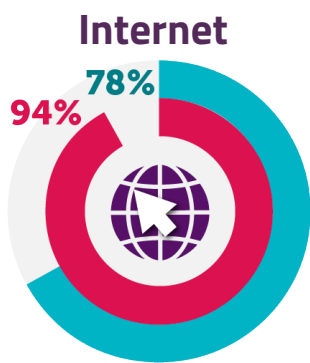
Personal use

Summary

Reflecting household ownership of communications devices and services, people with an impacting/limiting condition are more likely than those without any condition to personally use a landline phone and a mobile phone that is not a smartphone. Again, the opposite is true for games consoles, computers (including PCs, laptops and tablets) and smartphones.

People without impacting/limiting conditions are also more likely than those with a condition to personally use the internet anywhere.

 = With any limiting/impacting conditions
 = Without any limiting / impacting conditions



Internet use

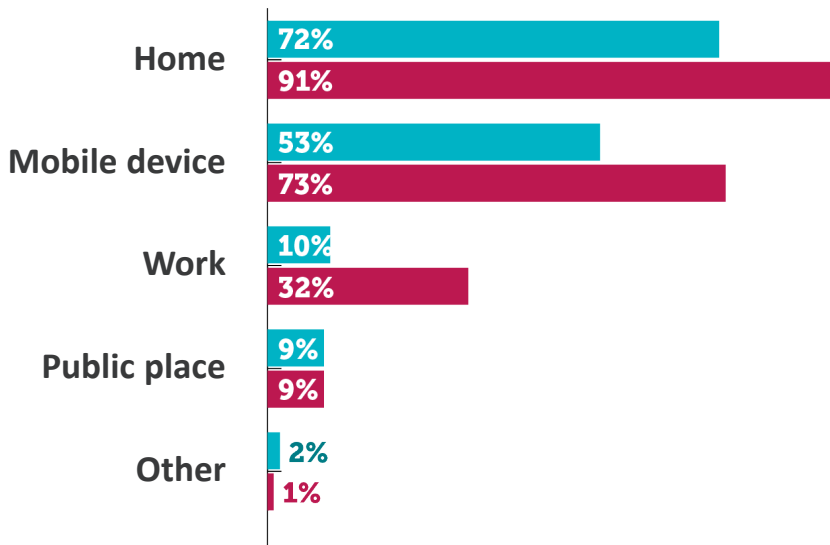
Summary

People with a condition that impact or limit their daily activity or the work they can do are less likely than people without any of these conditions to access the internet at home, on a mobile device, or in a work setting. They are as likely to access a publicly available computer.

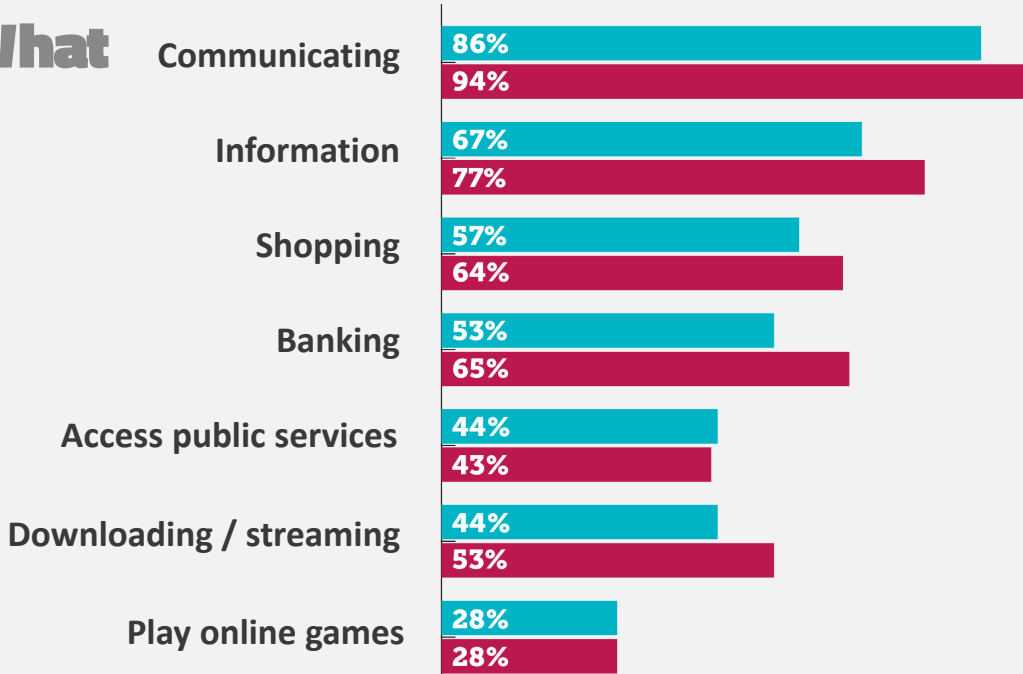
Those with an impacting/limiting condition are less likely to use the internet for information, online shopping, downloading/streaming content, communication (e.g. email and social networking) and banking. For both groups, communication is the most-named reason for using for the internet. People with an impacting/limiting condition were as likely as those without to access public services (44%) and play online games (28%).

 = With any limiting/impacting conditions
 = Without any limiting / impacting conditions

Where



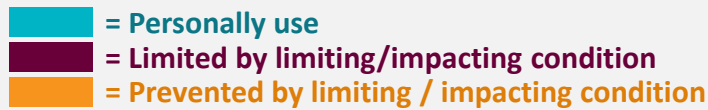
What



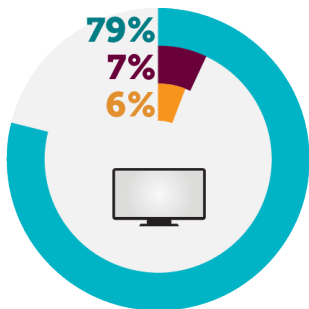
Limitations of use

Summary

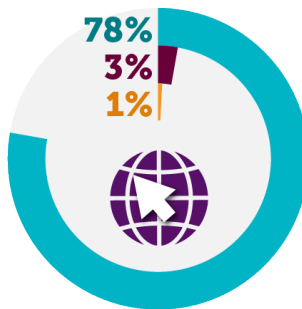
People with an impacting/limiting conditions are particularly likely to be prevented or limited from using a television (13%) or a computer (11%) because of their condition. Eight per cent of people also reported that their condition prevented or limited them from using a smartphone and/or mobile phone (not a smartphone), with 7% reporting the same for landline phones. Four per cent reported that their condition prevented or limited them from using the internet more generally.



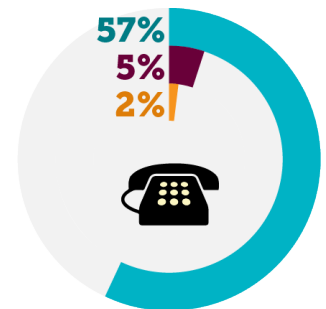
Television



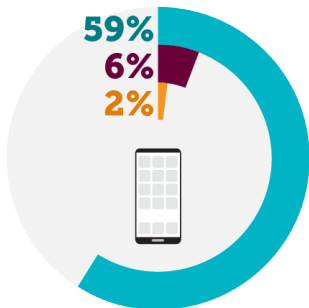
Internet



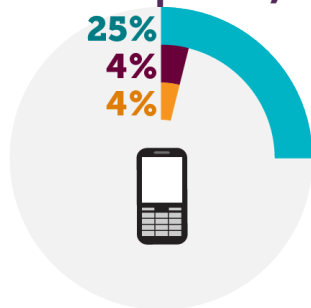
Landline



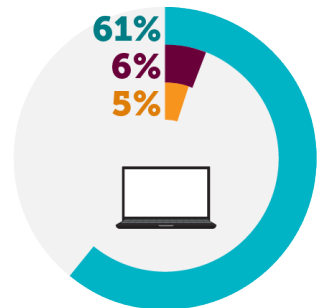
Smartphone



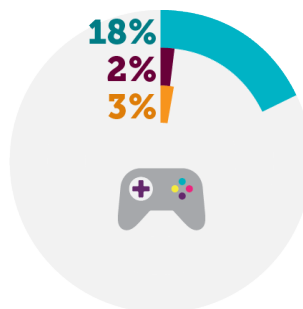
Mobile phone (not smartphone)



Computer



Games console



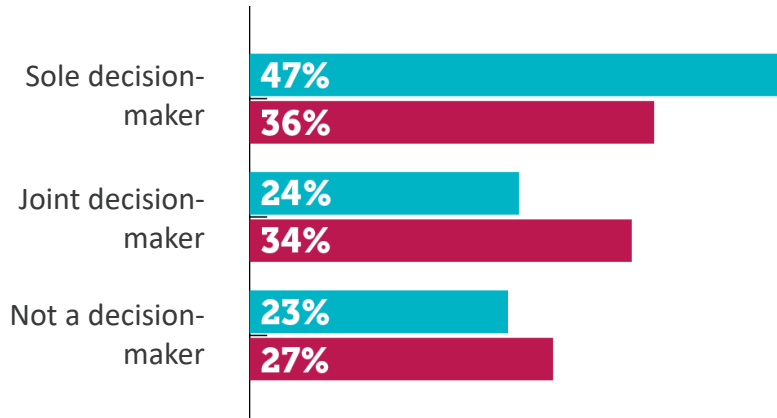
Decision-making

Summary

People with conditions that limit or impact their daily activity or the work they can do are more likely than those without a condition to be the sole decision-maker for choosing their internet service provider, although less likely to be a joint decision maker.

 = With any limiting/impacting conditions
 = Without any limiting / impacting conditions

Internet



Methodology

Under the Communications Act 2003, Ofcom has a specific duty to have regard to the needs of people with conditions which impact or limit their ability to carry out daily activities. To meet these responsibilities, we publish research which provides a summary of these consumers' household access to, and personal use of, communications devices and services, making comparisons with consumers without an impacting or limiting condition.

Due to the impact of the pandemic we were only able to complete two of the 10 waves of research, meaning our sample was limited, which in turn had an impact on the amount of analysis that we could conduct robustly. The limited sample means we are unable to make direct comparisons among groups with different conditions or look at detailed demographic analysis. As such, we have only included comparisons between respondents who do have any impacting or limiting condition, and those who do not have any conditions.

The research therefore includes 4,278 in-home interviews, carried out between 26 February and 10 March 2020 among UK adults aged 16+. The sample is reflective of the UK profile by sex, age, socio-economic group, region, and employment status.

Following the publication of our disability research in January 2019, we reviewed how we ask about disability in our consumer research. We conducted a consultation with a range of stakeholders which resulted in us updating the question wording. As a result the data included in this report is not directly comparable to previous Ofcom reports on disability. Please see the [published questionnaire](#) on our website.

In addition, to better reflect the new question wording, the name of this research activity has been changed from Disability Consumer research to Use of communication services, consumer omnibus.