

## Disabled consumers' use of communications services - 2015 report

### A Consumer Experience report

## Briefing Sheet: consumers with multiple impairments

In 2015, Ofcom published the *Disabled consumers' use of communications services* report.<sup>1</sup> This Briefing Sheet provides key headlines from the multiple impairment section of the report, focusing on access to, and use of, communications devices and services.

### 1.1 Background

Ofcom has a specific duty to have regard to the interests of disabled consumers. Therefore, we worked with the British Population Survey (BPS) to produce a report providing a robust analysis of disabled consumers' household access to, and personal use of, communications services across Great Britain. The report provides detailed analysis among consumers with hearing, visual, mobility, multiple, or learning disabilities; comparing by type of disability and by demographic group, as well as with non-disabled consumers, where possible.

### 1.2 Key findings from focus on multiple impaired consumers

- **Half of multiple-impaired consumers had internet access (anywhere), compared to nine in ten non-disabled consumers.** Internet access 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 this disability group (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%) for this disability group. But both had lower access levels than among non-disabled consumers in 2014 (42% and 32% respectively).
- **Multiple-impaired consumers were less than half as likely as non-disabled consumers to have access to a smartphone.** Access to a smartphone in the home increased by 12pp from 2012 (to 29%), lower than the proportion of non-disabled consumers in 2014 (66%). Access to any type of mobile phone had increased 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 a pay-TV service, than non-disabled consumers.** Almost five in ten (46%) had access to a pay-TV service, compared to 55% of non-disabled consumers. In contrast, access to a free-to-air TV service was higher for this disability group (65%) than for non-disabled consumers (50%).
- **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 most limited by consumers' multiple disabilities; 5% said they did not use a tablet as factors including their disability prevented this.

<sup>1</sup> The full version of this report can be found at [http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/1515282/Disabled\\_consumers\\_use\\_of\\_communications\\_services.pdf](http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/1515282/Disabled_consumers_use_of_communications_services.pdf)

### 1.3 Fast Facts

Figure 1 illustrates current levels of access to communication devices and services, across each disability type, highlighting where access was significantly higher or lower among each group compared to non-disabled consumers, and where access levels had increased or decreased since 2012.

**Figure 1 Access to devices and services among consumers**

	Non-disabled	All disabled	Mobility impairment	Hearing impairment	Visually impaired	Multiple impairments	Learning disability
Landline	72% ↓	77% ↓	79%	83%	75%	82%	66%
Any mobile	89% ↑	85% ↑	80%	86%	83%	82% ↑	87%
Smartphone	66% ↑	41% ↑	31% ↑	46% ↑	48% ↑	29% ↑	57%
PC/laptop	79%	64% ↑	59% ↑	71% ↑	66%	54%	68%
Internet	88% ↑	65% ↑	60% ↑	69%	75% ↑	49% ↑	73%
Tablet	42% ↑	30% ↑	27% ↑	32% ↑	33% ↑	23% ↑	41%
Games console	32%	21% ↑	13%	19%	27%	16% ↑	40%
Pay-TV	55%	48%	43%	48%	48%	46%	56%
Free-to-air TV	50% ↓	60% ↓	60%	61%	55%	65%	60%
DAB	26%	25% ↑	24% ↑	30%	24%	25% ↑	22%

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, learning disability: 199

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

↑↓ = 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)

Figure 2 compares current levels of access to communication devices and services with the proportion of each disability type who say they personally use that device/service.

**Figure 2 Access and personal use comparison among disabled consumers<sup>2</sup>**

	Mobility impairment		Hearing impairment		Visual impairment		Multiple impairments		Learning disability	
	Access	Personally use	Access	Personally use	Access	Personally use	Access	Personally use	Access	Personally use
Landline	79%	70%	83%	72%	75%	63%	82%	74%	66%	53%
Any mobile	80%	66%	86%	73%	83%	68%	82%	67%	87%	77%
Internet	60%	59%	69%	68%	75%	73%	49%	47%	73%	73%
Tablet	27%	21%	32%	22%	33%	24%	23%	18%	41%	31%
DAB radio	24%	21%	30%	24%	24%	18%	25%	19%	22%	15%
Satellite TV	31%	27%	33%	26%	34%	29%	33%	28%	37%	31%
Cable TV	13%	10%	18%	14%	18%	12%	15%	13%	22%	18%
Freeview TV	57%	50%	58%	51%	53%	42%	61%	54%	59%	50%
Freesat TV	5%	3%	7%	6%	6%	3%	6%	5%	6%	5%

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

Base: mobility impaired: 845, hearing impaired: 457, visually impaired: 319, multiple impairments: 698, learning disability: 199

○ = 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

<sup>2</sup> 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.

PC/laptops have not been included in this table as the survey splits these when asking about personal use, but groups them when asking about access.

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.