The Value of the Internet to Disabled Consumers

Research Report

For:

Ofcom

bdrc continental

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1. Executive Summary

Method and objectives

- A robust sample of face-to-face interviews was conducted via a consumer omnibus with disabled people (4431 interviews) and non-disabled people (1646 interviews) to understand the value of broadband to both groups and whether it might be appropriate to put measures in place to safeguard access to broadband for disabled people.

- Sufficient interviews were conducted to enable analysis by disability type (mobility impaired, hearing impaired, blind/visually impaired, multiple disabilities or 'other' disability) and within this, analysis by broad age and social class groupings.

Incidence of home internet access services

- Disabled people (57%) were significantly less likely to have home internet access compared to non-disabled people (85%). Home internet access levels were similar by disability type with the exception of people with 'other' disabilities where it was significantly higher (66%) compared to their counterparts.

- Social class access differences were consistent amongst both disabled and non-disabled people, where ABC1 disabled (73%) and non-disabled people (93%) were significantly more likely to have access at home than their C2DE counterparts (50% of disabled people and 77% of non-disabled people), albeit at a lower level for non-disabled people.

- Disabled people aged under 65 were more than twice as likely (76%) to have home internet access compared to 65+ disabled people (33%). However, this difference was not as accentuated for non-disabled people under 65 (90%) and 65+ (51%).

- Non-disabled people were significantly more likely to use in home and out of home internet access methods compared to disabled people. Differences were particularly marked for non-disabled people being more likely to use the internet via a mobile device or using in public spaces.

- The majority of disabled and non-disabled people received their home internet service as part of a package (with a telephone and/or TV service). However disabled people (77%) were significantly more likely than non-disabled people (71%) to receive their service as part of a package. This does not appear to disadvantage them in any way.

Future take-up

- Non-disabled people without internet access (24%) were significantly more likely to claim they would get the internet in the future compared to disabled people (8%).

- By disability type, the likelihood levels were similar with the exception of those with 'other' disabilities where there was a greater propensity to get home access (14%) which was largely attributable to under 65 year olds with an 'other' disability.

- By social class, claimed future internet take-up amongst ABC1 non-disabled people was stronger than for C2DEs. However, for disabled people the levels of claimed take-up were similar for ABC1 and C2DE social classes.

    - ABC1 non-disabled people without internet access (40%) were significantly more likely to claim they would get the internet at home compared to C2DEs (20%)

    - 9% of ABC1 non-disabled people and 8% of C2DEs claimed they would get the internet at home.

    - Of all disability types, only mobility impaired C2DE non-users (6%) were significantly more likely than ABC1s (2%) to be likely to get the internet in the future.

- By age, under 65 year olds were significantly more likely to think they would get home internet access compared to 65+ year olds for both disabled and non-disabled groups as well as across all disability types:

    - Non-disabled people without the internet at home likely to get the internet at home: 35% of under 65s and 9% of 65+

    - Disabled people without the internet at home likely to get the internet at home: 18% of under 65s and 4% of 65+.

Triggers and Barriers

- There were no major barriers preventing disabled people from getting the internet at home.

- A minor disadvantage to disabled people was a lack of knowledge as to how to use the internet. 10% of disabled people and 5% of non-disabled people spontaneously said they did not know how to use the internet. This suggests that home internet access could be opened up to disabled people further if they were given training or if there was information available to them to demystify using the internet at home.

- The main barrier to home internet take up amongst non-users was one of apathy where:

- A lack of interest in the internet was a main reason given for not having home access currently. This reason was stated to a significantly greater extent by disabled people (68%) than non-disabled people (45%).

- The majority of people without home internet access believed they were not missing any benefits because of non-access (78% of disabled people and 67% non-disabled people). Additionally there was nothing they would like to do online which they could not do currently (82% of disabled people and 77% of non-disabled people).

- Another minor barrier identified was cost, mentioned more spontaneously by non-disabled people than disabled people (12% of disabled and 21% of non-disabled).

The value of broadband to disabled customers - benefits

- Internet access benefits were largely perceived at similar levels by disabled and non-disabled people, with communicating or emailing friends or family, the ability to look up information generally, ability to buy things online and ability to do online banking being the most mentioned benefits. A significantly greater perceived benefit was found amongst non-disabled home internet users compared to disabled users for:

    - The convenience of doing work or study at home (30% non-disabled, 17% disabled) is attributable to a greater proportion of non-disabled people who work

    - The ability to do online banking (27% non-disabled, 21% disabled)

    - Access to entertainment (19% non-disabled, 11% disabled)

    - The ability to use social networking sites (18% non-disabled, 14% disabled).

- By disability group, some activities were perceived as benefits to a greater extent by hearing-impaired people and to some extent blind and visually impaired people than other disability types. These differences were generally significantly higher than for people with mobility impairments.

    - Hearing impaired home internet users were significantly more likely to perceive the following as benefits:

        - to perceive the ability to communicate or email businesses and services – 14% versus 10% of all disabled people (significantly higher than mobility impaired, those with multiple disabilities and people with other disabilities)

        - to look up information generally – 45% versus 39% of all disabled people (significantly higher than mobility impaired and blind/visually impaired people)

        - to do online banking 25% versus 21% of all disabled people (significantly higher than mobility impaired and blind/visually impaired people)
        - the convenience of doing work or study from home – 22% versus 17% of all disabled people (significantly higher than mobility impaired and those with multiple disabilities).
    - Blind or visually impaired home internet users were also significantly more likely to perceive the benefit of working or studying at home- 20% versus 17% of all disabled people (significantly higher than mobility impaired people and those with multiple disabilities).
    - Home internet users with 'other' disabilities were significantly more likely to say the ability to use social network sites was a benefit – 16% versus 14% of all disabled people (significantly higher than mobility impaired people).
- Benefits were perceived at a higher level amongst home internet users aged under 65 compared to those aged 65+.
- This was particularly prevalent amongst disabled people where each benefit was perceived at a significantly higher level amongst disabled people aged under 65 compared to those aged 65+.

The value of broadband to disabled customers - usage

- Online activities were either carried out at similar levels by disabled and non-disabled home internet users, or activities were carried out to a greater extent by non-disabled rather than disabled users, which suggests that the internet is used more diversely by non-disabled users.
- Activities carried out to a significantly greater extent by non-disabled people were:
    - Using for work or study purposes (attributable to a greater proportion of non-disabled people in work or education)
    - Communicating with friends or making free telephone calls [i.e. via VoIP]
    - Finding out news and weather information
    - Shopping/transacting activities including banking/paying bills, shopping for non-grocery goods and selling goods
    - Entertainment activities including: watching TV programmes or films, watching video clips, listening to the radio/music or downloading music/movies.

- Where increased activity levels are found amongst disabled home internet users, it is largely where hearing impaired, blind or visually impaired or other disability groups were carrying out the activity to a greater extent.

Faults experienced

- Disabled home internet users (39%) were significantly more likely than non-disabled users (29%) to have encountered a problem with internet or phone services in the last year.
    - Blind or visually impaired disabled users (45%) and those with multiple disabilities (43%) were more likely to have encountered these problems (a significant difference to mobility impaired users).
- The most likely problem encountered by both disabled and non-disabled users was a problem connecting to the internet attributable to their internet service provider (ISP). This problem was encountered to a significantly greater extent by disabled users (15%) than non-disabled users (11%).
- Other main problems encountered were access problems associated with the computer (7% of disabled users and 4% of non-disabled users) and an unknown problem (10% of disabled users and 6% of non-disabled users).
- Problems were no more likely to be experienced by users with specific types of disabilities, with the exception of blind or visually impaired users who were more likely to have had a faulty router replaced (11%).
- By social class, ABC1 users were more likely to experience problems, but this was the case for both disabled and non-disabled people. ABC1 disabled users (42%) and non-disabled users (34%) were more likely to encounter internet or phone service problems than C2DEs (36% of disabled users and 23% of non-disabled users).
- By age, younger disabled users were more likely to experience problems, which was not borne out for non-disabled users. This could be because those aged 65+ are more likely to be getting support from their personal network of friends or family.
    - Disabled users aged under 65 encountering internet or phone service problems (42%), 65+ disabled users (30%).
- Over two-thirds of users experiencing problems had reported the fault (68% of disabled and 73% of non-disabled people). Around half of those reporting the fault needed an engineer (31% of all disabled users and 33% of all non-disabled users).

The impact of having a fault

- The impact of a fault for each internet activity on disabled and non-disabled home internet users was very similar with no significant differences in impact between each group.
    - Entertainment online uses were the activities where users were impacted most by a fault. 40% or more users reported that they were unable to carry out the activity. This category included watching video clips, downloading music or movies or playing online games.
    - Other activities impacted the most (where 40% or more users were unable to carry out the activity) were making free telephone calls and selling goods.

Activities which were impacted least by a fault (less than 30% for each activity) were: using for school or college, communicating with businesses and services, finding out news and weather information, finding out information on public services provided by government or businesses, finding out information on travel and holidays and listening to the radio or music.

2. Background

Ofcom (Office of Communications) is the regulator for the UK communications industries, with responsibilities across television, radio, telecommunications and wireless communications services. The Postal Services Act of 2011 gave Ofcom additional duties in the postal market.

Ofcom's primary duty is to further the interests of citizens and consumers where appropriate by promoting competition. Ofcom also has a commitment to ensure that consumers' communication needs are properly served in light of social and technological changes.

Communication services are important for all citizens in today's connected society. They provide people with access to cultural and educational activities, services and commerce and can make it easier to participate in civil society. Ofcom has an obligation to have an up-to-date understanding of all groups of people including disabled people in the UK communications market.

The way that many people engage with technology has changed dramatically in the last ten years. We have seen the rapid emergence of digital technology and the growing importance of services delivered over broadband.

Many disabled people are active users of communication services but may, because of their disabilities, face difficulties when using services which other people take for granted.

Ofcom has been carrying out a review of the range of services available to promote access to communications services for disabled people. Communications providers are required to provide a suite of services for older people and disabled people including:

- Access to an approved text relay service for people who are hearing- or speech-impaired, with rebates to compensate customers for the additional time taken by these calls
- Free directory enquiries for consumers who are unable to use a printed directory because of a disability, with through-connection of calls
- Priority fault repair (fixed-line only) for customers who depend on the telephone because of ill-health or disability
- Third party bill management, enabling a nominated friend or relative to act on behalf of someone who needs help managing their affairs
- Bills and contracts in formats such as large print and Braille on request

Communications providers are also required to publicise these services.

3. Objectives

The key objectives of the research were:

- To help Ofcom determine whether it might be appropriate to put measures in place to safeguard access to broadband for disabled and older people
- To confirm the incidence of take up of broadband services amongst different groups of disabled consumers
- To better understand the value of having access to broadband services to disabled consumers and the reasons why some disabled consumers have not taken up broadband services
- For those disabled consumers that do not have access to broadband services, Ofcom wished to understand the range of reasons behind this and what the key drivers were
- For those disabled consumers that do have access to broadband services, what they used it for and what the impacts were of not having access to their broadband service in the event of a fault
- To understand these areas by different types of disability.

Analysis of experiences of disabled consumers with and without access to broadband services was a key priority, as was exploring the differences between disabled consumers and consumers without disabilities.

4. Research Methodology

A large sample of disabled people was required, to enable analysis within disability (by age and social class), as well as comparing experiences to non-disabled people. Therefore quantitative research was used to meet the objectives.

A face-to-face consumer Omnibus was chosen as the most appropriate research method to achieve a representative sample of UK adults aged 16 or over, and a cost-effective means of reaching a large sample of disabled people. Omnibus fieldwork was conducted via the TNS Omnibus (which runs one midweek and one weekend Omnibus wave per week) for a 10 wave period spanning five weeks from 12 June to 21 July 2013.

Random location sampling was used to select sample areas. Quotas (by sex, working status and presence of children in the household) were set during interviewing to minimise any selection bias. The Omnibus used a weighting matrix based on gender, age (16-24, 25-34, 35-54, 55+), social class (ABC1, C2, DE) and grouped according to the Registrar General's Regions (North, Midlands, South). In addition, England, Wales, Scotland and Northern Ireland weights were imposed to ensure further regional and national representation.

This generated a sample size of 4431 interviews with disabled people. This allowed analysis by age (under 65 year olds and 65 years and over) and by social class (social grades ABC1 and C2DE).

For two of these waves (at the start of fieldwork) people without disabilities were also included to generate a sample of 1646 non-disabled respondents.

Disabled respondents self-categorised into the following groups (those with more than one disability could fall into more than one category). The number of interviews within each disability type is also provided:

Mobility impaired (2352 interviews):

- Cannot walk at all/uses a wheelchair
- Cannot walk very far or manage stairs (or can but with difficulty)
- Limited ability to manipulate items, grasp or reach

Hearing impaired (818 interviews): poor hearing, partial hearing or deafness

Blind or visually impaired (720 interviews): poor vision, partial sight or blindness

Multi-disability (1254 interviews): with more than one disability

Other disability (1183 interviews):

- Limited memory or ability to concentrate, learn or understand

- Difficulty in reading other than a visual impairment
- Other disability that doesn't fall into any of the categories above

The un-weighted sample size for each key group by age is provided in figure 1.

Figure 1 Un-weighted sample sizes

	Under 65 years	65 or more years	Total
Non-Disabled	**1355**	**291**	**1646**
Any Disability	**2109**	**2322**	**4431**
Mobility Impaired	933	1419	2352
Hearing Impaired	236	582	818
Blind/Visual Impaired	308	412	720
Multiple Disability	526	728	1254
Other Disability	794	389	1183

Note: For disabled respondents, those with more than one disability could fall into more than one category.

Disabled people were also asked to self-categorise their disability on a scale of one to five, where five was categorised as extreme and one was categorised as mild. The results were then grouped for analysis purposes as mild (scores one or two), medium (score three) and extreme (scores four or five). If a respondent had more than one disability, the question was asked about their stated main disability.

A pilot was run to test for questionnaire comprehension. The questionnaire was piloted by BDRC Continental face-to-face interviewers. 50 pilot interviews were conducted with disabled people. No quotas were imposed but a spread of disabled people was included to include a mix of disabilities, ages and gender.

The Omnibus stratified sampling method corrects disproportionately high numbers of interviews from certain smaller geographic locations in order to ensure robust samples for analysis amongst all regions. Weighting is used to correct for this and to ensure data is demographically representative of the UK population as a whole. Data was weighted to the National Readership Survey[1] which takes population estimates from JICPOPS (Joint Industry Committee for Population Standards) in terms of age, social grade, broad region within gender. Further details on the sampling method can be found in appendix D.

Survey results can be found in section 6.

[1] http://www.nrs.co.uk/sample.html

All research processes were conducted to ISO 20252 standards[2].

4.1.1 Notes on interpretation

Disabled and non-disabled results are reported separately and comparisons are drawn between the two groups. Results are also compared by disability type, and within this by social class (ABC1 and C2DE) and age (under 65 years old and those aged 65 years or over).

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

As shown in appendix A, there were some differing age profiles by disability type which may impact on internet usage. Therefore these survey results may be affected by age as well as by disability type.

- Hearing impaired people were slightly older than other disability groups (63% were aged 65+)
- Mobility impaired people (54% 65+), blind or partially sighted people (50% 65+) and people with multiple disabilities (51% 65+) were evenly spread over and under 65 years
- People with 'other' disabilities were two-thirds under 65 (73%)

[2] http://www.iso.org/iso/catalogue_detail?csnumber=39339

Given the range of sub-groups on some graphs and tables, base sizes are shown using abbreviations, these are:

- Mobility impaired abbreviated as MI
- Hearing impaired abbreviated as HI
- Blind or visually impaired abbreviated as BVI
- Multi-disability abbreviated as MD
- Other disability group abbreviated as O

5. Conclusions

The review suggests that disabled people are largely not disadvantaged in their access to the internet at home compared to non-disabled people. Their behaviour is different in some ways, but this behaviour appears to be out of choice as opposed to barriers preventing them from behaving in a similar way to non-disabled people.

Home internet access is lower amongst disabled people than non-disabled people, but this appears to be largely due to choice, rather than to specific barriers. The exception is a lack of knowledge on how to use the Internet amongst disabled people

Disabled people were more likely to have home access as part of a package rather than a standalone service, but this does not appear to be disadvantageous to them.

Home internet connection problems are more prevalent amongst disabled people than non-disabled people, and in particular younger (under 65s), blind/visually impaired and multi-disability users. Problems relate to the ISP specifically as well as unknown problems and issues with their own computers.

However, the number of faults requiring an engineer to visit was slightly lower in the disabled group (31% disabled, 33% non-disabled).

6. Main Findings

6.1 Internet access

6.1.1 Overall internet access levels

Internet access was measured via a list of potential access methods. The full break-down of access via these methods is provided in appendix B.

Home internet access was defined as home internet access using Wi-Fi, a wired connection, a mobile network or a dial-up connection. Disabled people (57%) were significantly less likely to have home internet access than non-disabled people (85%) as shown in figure 2. Home internet access was similar by disability type with the exception of people with 'other' disabilities where it was higher (66%).

Similar differences were also found for the proportion with any access (both in and outside the home) where 59% of disabled people had any type of access and a significantly higher proportion (88%) of non-disabled had access. Access by type of disability was similar with the exception of a significantly higher proportion of 'other' disabled people with any access (69%).

Figure 2 Internet access at home or any access

	Non-Disabled	Disabled					
		Any	Mobility Impaired	Hearing Impaired	Blind/Visually Impaired	Multiple Disability	Other
% access at home*	**85%**	57%	51%	52%	49%	50%	**66%**
% any access	**88%**	59%	52%	55%	51%	52%	**69%**

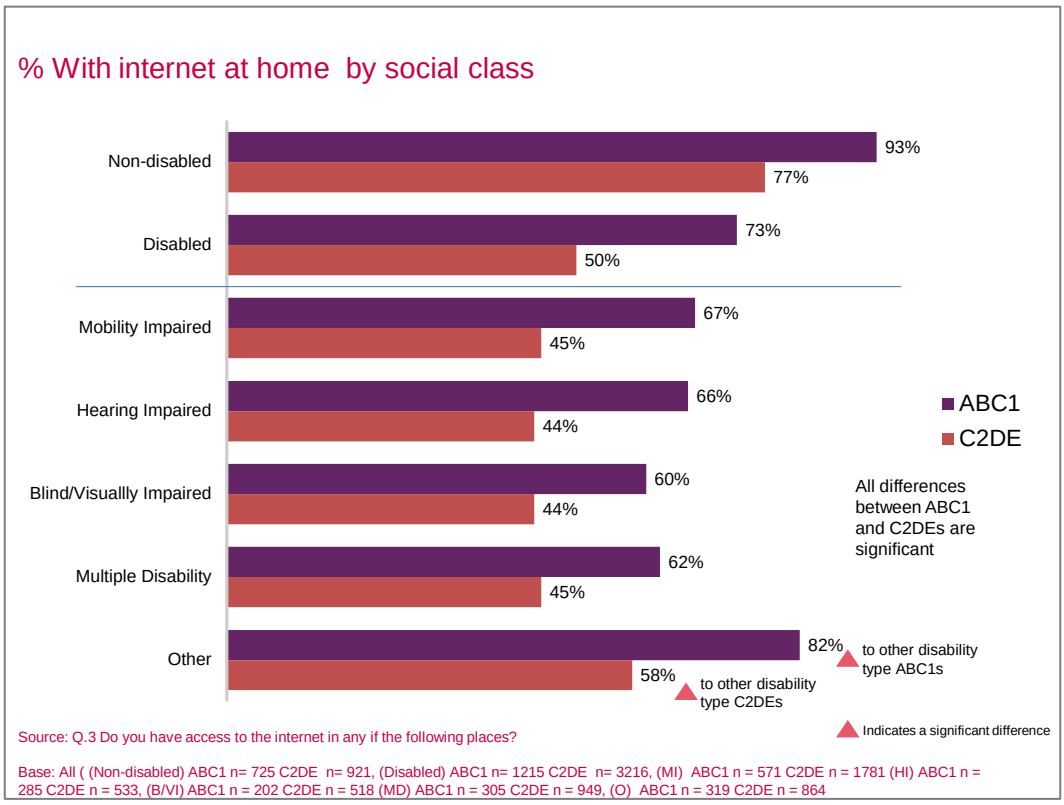
Significance differences are emboldened

Source: Q.3 Do you have access to the internet in any of the following places?

Base: All non-disabled (1646), Disabled (4431), MI n = 2352, HI n = 818, B/VI n = 720, MD n = 1254, O n = 1183

As shown in figure 3, social class access differences were consistent amongst both disabled and non-disabled people, where ABC1 disabled (73%) and non-disabled people (93%) were significantly more likely to have access at home than their C2DE counterparts (50% of disabled people and 77% of non-disabled people), albeit at a lower level for non-disabled people. Results were similar by disability type, except significantly higher home access levels for ABC1 and C2DE 'other' disabled people.

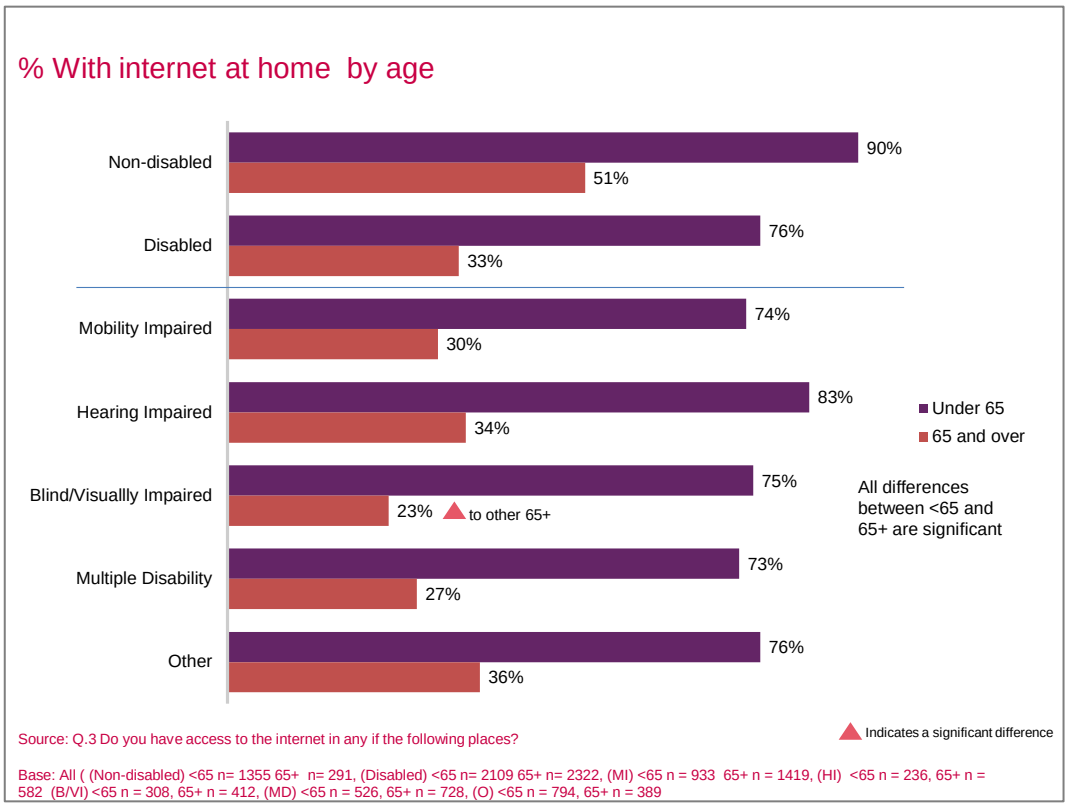
Figure 3



Home internet access by age group showed a greater difference (compared to social class) between under 65 year olds and those aged 65+ as shown in figure 4. Disabled people aged under 65 year olds (76%) were more than twice as likely to have home internet access compared to 65+ disabled people (33%). This significant difference was also found for non-disabled people but slightly less pronounced - non-disabled people under 65 (90%) and 65+ (51%).

As demonstrated in figure 4 hearing impaired disabled people under 65 years were the most likely to have home internet access (83%), this was significantly higher than all other disabled groups. Blind or visually impaired people aged 65+ were significantly less likely to have home internet access (23%) than all other disabled groups.

Figure 4



Disabled people with milder disabilities [self-rated as 1 or 2 out 5 for severity] were more likely to have the internet at home (63%) than those with a medium severity (53%) or a severe disability [rating of 4 or 5 out 5 for severity] (55%).

6.1.2 Type of internet service

Respondents with home internet access were asked if their internet service came as part of a package along with telephone and/or TV services or if it was a standalone service. Whilst the majority of disabled and non-disabled people received their home internet service as part of a package, disabled people (77%) were significantly more likely than non-disabled people (71%) to receive it as part of a package. Being more likely to access internet home services via a package does not seem to be disadvantageous to disabled people, however. This is shown in figure 5.

The type of internet service received was similar by disability group with no significant differences as show in figure 5. Additionally, there were no significant differences in services received by age or social class amongst disabled home internet users, whereas non-disabled ABC1 users were significantly more likely to access via a package (74%) than C2DEs (68%) as shown in figure 5.

Figure 5 Internet package type

	As part of a package (including telephone and/or TV services)	A standalone service
Non-Disabled	71%	25%
Any Disability	77%	20%
Mobility Impaired	78%	19%
Hearing Impaired	79%	17%
Blind/Visual Impaired	79%	15%
Multiple Disability	78%	19%
Other Disability	75%	22%
Disabled ABC1	74%	23%
Disabled C2DE	68%	27%

Source: Q.4 Do you receive your internet services as part of a package (provided by the supplier) along with telephone and/or TV services or is your broadband a standalone service separate from a telephone and/or TV package?
Base: All with Internet access at home Non-disabled n = 1354, Disabled n = 2334, MI n = 1105, HI n = 391, B/VI n = 322, MD n = 575, O n = 728

6.2 Perceived benefits

Home internet users were asked what they believed to be the main benefits of having internet access at home. A list of potential benefits was shown to respondents and they could select multiple options. Benefits are sub-categorised by communication, shopping, entertainment and other categories as show in figure 6 which shows the main benefits selected by disabled and non-disabled home internet users.

Home internet access benefits were largely perceived at similar levels by disabled and non-disabled people, with communicating or emailing friends or family, the ability to look up information generally, ability to buy things online and ability to do online banking being top benefits.

A significantly greater benefit was found amongst non-disabled home internet users compared to disabled users for:

- The convenience of doing work or study at home (30% non-disabled, 17% disabled) This is further examined in figure 8 to show these benefits amongst those who work or study which suggests that the differences between disabled and non-disabled people are attributable to a greater proportion of non-disabled people who work
- The ability to do online banking (27% non-disabled, 21% disabled)
- Access to entertainment (19% non-disabled, 11% disabled)
- The ability to use social networking sites (18% non-disabled, 14% disabled).

Disabled home internet users were significantly more likely to perceive home internet access as providing independence compared to non-disabled people (14% non-disabled, 18% disabled).

Figure 6 Main benefits of home internet access

	Disabled	Non-disabled
Any Communication	48%	49%
Communicate with/email friends and family	37%	37%
Communicate with/email friends and family who live far away	23%	25%
Communicate with/email businesses and services	10%	11%
Any Shopping	34%	31%
Ability to buy things online	27%	26%
Ability to shop online without going out	18%	16%
Any Entertainment	17%	**23%**
Access to entertainment	11%	**19%**
Playing games online, downloading music, etc.	10%	11%
Other		
Ability to look up information generally	39%	35%
Ability to do online banking	21%	**27%**
Convenience of doing work/study at home	17%	**30%**
Gives independence	**18%**	14%
Ability to use social networking sites	14%	**18%**
Ability to keep up with current news and events happening around the world	12%	13%
Access to cheaper goods and services online	10%	11%

Significance differences are emboldened

Source: Q.11 What if any would you consider to be the main benefits to you having internet access at home? What are they? Select all that apply.
Base: All with Internet access at home Disabled n=2334, Non-disabled n= 1354

6.2.1 Perceived benefits by disability group

By disability group some benefits were perceived to a greater extent by hearing impaired people and to some extent blind and visually impaired people than by people with other disability types. The benefits were usually perceived at a significantly higher level than people with mobility impairments which reflects the lower perceptions of benefits amongst people with mobility impairments as well as the higher perceptions of benefits amongst hearing, blind or visually impaired people. The differences are shown in figure 7.

Hearing impaired home internet users were significantly more likely to perceive the following benefits compared to other types of disabled people:

- Ability to communicate with or email businesses and services 14% - significantly higher than mobility impaired (8%) and multiple disability (9%) groups
- Ability to look up information generally 45% - significantly higher than mobility impaired (38%) and blind or visually impaired (36%) groups
- Ability to do online banking 25% - significantly higher than mobility impaired (18%) and blind or visually impaired (21%) groups
- Convenience of doing work or study from home 22% - significantly higher than mobility impaired (13%) and multiple disability (15%) groups.

For the latter benefit, blind or visually impaired home internet users were also significantly more likely to perceive the benefit of working or studying at home (20%) compared to mobility impaired (13%) and multiple disability (15%) .

Home internet users with 'other' disabilities were the most likely to say the ability to use social networking sites was a benefit (16%), significantly higher than mobility impaired groups. As this group has a younger profile, age may account for this difference given social networking is more prevalent amongst younger age groups.

Figure 7 Main benefits of home internet access by disability group

	% Mobility impaired	% Hearing impaired	% Blind/ Visually impaired	% Multiple disability	% Other disability
Any Communication	46	50	49	45	47
Communicate with/email friends and family	36	38	41	36	38
Communicate with/email friends and family who live far away	23	25	23	23	23
Communicate with/email businesses and services	8	**14**	10	9	9
Any Shopping	35	30	32	34	33
Ability to buy things online	28	26	27	28	26
Ability to shop online without going out	19	18	16	20	18
Any Entertainment	16	17	19	18	19
Access to entertainment	10	13	14	11	12
Playing games online, downloading music, etc.	11	9	9	11	11
Other					
Ability to look up information generally	38	**45**	36	39	40
Ability to do online banking	18	**25**	21	19	22
Convenience of doing work/study at home	13	**22**	**20**	15	19
Gives independence	20	18	20	21	15
Ability to use social networking sites	11	13	15	13	**16**
Ability to keep up with current news and events happening around the world	11	13	11	13	13
Access to cheaper goods and services online	10	**14**	10	12	10

Significance differences are emboldened

Source: Q.11 What if any would you consider to be the main benefits to you having internet access at home? What are they? Select all that apply.

Base: All with Internet access at home MI n = 1105, HI n = 391, B/VI n = 322, MD n = 575, O n = 728

The convenience of doing work or studying from home is examined in figure 8 by those who are currently working or currently studying to demonstrate the benefit of working or studying amongst these sub-groups. Although non-disabled users perceive home internet access as a greater benefit than disabled people overall, when examining only those who work or study, the perceived benefit levels are very similar.

Figure 8 Convenience of doing work or study at home

	Disabled	Non-disabled
Working	29%	33%
Studying	46%	56%

Source: Q.11 What if any would you consider to be the main benefits to you having internet access at home? What are they? Select all that apply.
Base: All with Internet access at home disabled: working n = (570), studying n = (54 -low base). Non-disabled: working n = (828), studying n = (107).

6.2.2 Perceived benefits, differences by age and social class

Age

Overall, amongst both disabled and non-disabled people, benefits were perceived at a higher level amongst younger home internet users aged under 65 compared to those aged 65+. This difference was more prevalent amongst disabled people where each benefit was perceived at a significantly higher level amongst under 65 year olds compared to 65+. This is shown in figure 9 with the figures emboldened where significantly higher levels are found for under 65 year olds compared to those aged 65 or more.

Amongst non-disabled home internet users, entertainment purposes were perceived as a benefit to a greater extent by under 65 year olds compared to 65+ users as shown in figure 8.

Figure 9 Main benefits of home internet access by age

	Age			
	Disabled		Non-Disabled	
	<65	65+	<65	65+
Entertainment	**20%**	8%	**24%**	10%
Shopping	**36%**	25%	**32%**	26%
Communication	**49%**	43%	**49%**	52%

Significance differences are emboldened

Source: Q.11 What if any would you consider to be the main benefits to you having internet access at home? What are they? Select all that apply.
Base: All with internet access at home Disabled <65 n= 1564, 65+ n= 770, Non-disabled <65 n= 1203, 65+ n= 150

Social class

Analysis by social class shows that for both disabled and non-disabled home internet users, entertainment categories were perceived as a benefit to a greater extent by C2DE social classes compared to ABC1s, whereas shopping and communication categories were perceived as benefits to a greater extent by ABC1s compared to C2DEs. Demonstrating particular benefits for disabled ABC1s, 'other' benefits were identified to a greater extent compared to C2DEs, but the same pattern does not emerge for non-disabled people by social class. This is shown in figure 10.

Figure 10 Main benefits of home internet access by age

	Social Class			
	Disabled		Non-Disabled	
	% ABC1	% C2DE	% ABC1	% C2DE
Entertainment	15	**19**	21	**26**
Shopping	**38**	31	33	29
Communication	**52**	45	51	47
Other				
Ability to look up information generally	**43**	37	37	34
Ability to do online banking	**25**	18	28	24
Convenience of doing work/study at home	**23**	14	**35**	25
Gives independence	16	19	12	15
Ability to use social networking sites	12	15	17	20
Ability to keep up with current news and events happening around the world	**14**	10	**16**	10
Access to cheaper goods and services online	**12**	9	12	10

Significance differences are emboldened

Source: Q.11 What if any would you consider to be the main benefits to you having internet access at home? What are they? Select all that apply.

Base: All with internet access at home Disabled ABC1 n= 814, C2DE n=1520, Non-disabled ABC1 n= 665, C2DE n=688

6.3 Activities carried out online

To measure activities carried out online, a list of potential activities was shown to home internet users who were asked which they do when using the internet. The activities were analysed under sub-categories which included finding information, communicating, shopping or making transactions, entertainment and working/studying. The activities carried out by disabled and non-disabled home internet users are shown in figure 11.

Online activities were either carried out at similar levels by disabled and non-disabled home internet users, or activities were carried out to a greater extent by non-disabled rather than disabled users, which suggests that the internet is used for a more diverse range of activities by a broader range of non-disabled users. This is shown in figure 11, with significantly different uses by disabled and non-disabled people emboldened.

Activities carried out to a greater extent by non-disabled home internet users than disabled users spanned all categories, but in particular most entertainment-related activities were carried out more by non-disabled compared to disabled users:

Work/studying:

- Using for work, job or business (30% of non-disabled users and 16% of disabled users). The proportion of workers using for work is shown in figure 12
- Using for school, college, university homework, etc. (17% of non-disabled users and 7% of disabled users). The proportion of students using for studying purposes is shown in figure 12.

Communication:

- Communicating with friends (65% of non-disabled users and 58% of disabled users)
- Making free telephone calls (23% of non-disabled users and 18% of disabled users)

Information:

- Finding out news and weather information (39% of non-disabled users and 35% of disabled users)

Shopping/transacting:

- Banking/paying bills (43% of non-disabled users and 33% of disabled users)
- Shopping for non-grocery goods (50% of non-disabled users and 42% of disabled users)
- Selling goods (17% of non-disabled users and 14% of disabled users)

Entertainment:

- Watching TV programmes or films (35% of non-disabled users and 25% of disabled users)
- Watching video clips (36% of non-disabled users and 26% of disabled users)
- Listening to the radio/music (26% of non-disabled users and 19% of disabled users)
- Downloading music/movies (26% of non-disabled users and 18% of disabled users)

Figure 11 Activities carried out online

	% Disabled	% Non-Disabled
Any work/college	20	**40**
Using for work, job or business	16	**30**
Using for school, college, university homework etc.	7	**17**
Communicating	62	**70**
Communicating with friends	58	**65**
Communicating with businesses and services e.g. the local council	13	15
Making free telephone calls e.g. using service such as Skype	18	**23**
Information finding	76	78
Finding out news and weather information	35	**39**
Finding out information on public services provided by national or local government of from businesses	24	23
Finding information related to hobbies and interests	33	32
Finding out information on travel/holidays/what's on in local area	30	32
General searching information	64	67
Shopping/transacting	60	**67**
Banking/paying bills	33	**43**
Grocery Shopping	22	21
Shopping for goods (not grocery) (any)	42	**50**
Selling goods	14	**17**
Accessing government services online e.g. council tax, benefits etc.	19	19
Entertainment	50	**58**
Watching TV programmes or films	25	**35**
Watching video clips (e.g. YouTube, etc)	26	**36**
Listening to the radio/music	19	**26**
Downloading music/movies	18	**26**
Playing games online	21	21

Significant differences are emboldened
Source: Q.5 And which of the following activities, if any, do you do when you use the internet?

Base: All with Internet access at home Disabled n=2334, Non-disabled n= 1354

Disabled and non-disabled home internet users who work or study use to a greater extent for these activities than the overall samples of each. Both these disabled and non-disabled people were using at a similar level as shown in figure 12.

Figure 12 Activities carried out online by workers or students

	Disabled	Non-disabled
Using for work, job or business	42% of workers	39% of workers
Using for school, college, university or homework	63% of students	73% of students

Source: Q.5 And which of the following activities, if any, do you do when you use the internet?
Base: All with Internet access at home disabled: working n= (570), studying n= (54 -low base). Non-disabled: working n= (828), studying n= (107).

6.3.1 Activities carried out by disability group

The differences in online activities carried out by the different disability groups are demonstrated in this section. Where increased activity levels are found, it is largely where hearing impaired, blind or visually impaired or other disability groups are carrying out the activity to a greater extent. This applies to at least some activities in each category. These differences are described within each category section as follows.

Work and study activities

Figure 13 shows the proportion of each type of disabled home internet user using for work or study purposes. Blind or visually impaired and other disability groups were significantly more likely to be using the internet for both study and work related reasons compared to mobility impaired and multiple disability groups, although there is little difference in the proportions of these groups who work or study compared to all disabled people. The hearing impaired group was also significantly more likely to be using for work related reasons.

Figure 13 Work/study activities carried out online by disability group

	% Mobility Impaired	% Hearing Impaired	% Blind/ Visually Impaired	% Multiple Disability	% Other Disability
Any work/college	13	**23**	**21**	12	**26**
Using for work, job or business	11	**21**	**18**	9	**19**
Using for school, college, university homework etc.	3	6	**8**	4	**11**

Significant differences are emboldened
Source: Q.5 And which of the following activities, if any, do you do when you use the internet?

Base: All with Internet access at home MI n = 1105, HI n = 391, B/VI n = 322, MD n = 575, O n = 728

Communication activities

The 'other' disabled group were the most likely home internet users to be communicating with friends and making free telephone calls, significantly higher than mobility impaired and multiple disability groups (and higher than hearing impaired for making free telephone calls). This is likely to be driven by the younger profile of those with 'other' disabilities compared to the overall profile of disabled people:

- Communicating with friends: 65% of under 65 year olds and 44% of 65+ in the 'other' disability group
- Making free telephone calls: 21% of under 65 year olds and 13% of 65+ in the 'other' disability group.

Blind or visually impaired users were also significantly more likely to be making free telephone calls (compared to mobility impaired and multiple disability groups). This is shown in figure 14.

Figure 14 Communication activities carried out online by disability group

	% Mobility Impaired	% Hearing Impaired	% Blind/ Visually Impaired	% Multiple Disability	% Other Disability
Any communication	58	62	63	57	**66**
Communicating with friends	53	57	58	52	**62**
Communicating with businesses and services e.g. the local council	11	14	12	10	14
Making free telephone calls e.g. using service such as Skype	15	15	**21**	14	**20**

Significant differences are emboldened
Source: Q.5 And which of the following activities, if any, do you do when you use the internet?
Base: All with Internet access at home MI n = 1105, HI n = 391, B/VI n = 322, MD n = 575, O n = 728

Information finding activities

Figure 15 shows that one of the areas with greater variance by disability group was for information finding activities. The disability groups using to a greater extent for certain information-finding activities were:

Hearing impaired users, using the following more than at least one other group:

- News and weather information (40%)
- Information on public services (27%)
- Hobbies and interest information (38%)
- Travel/holiday information (34%)

Other disability group users, using the following more than at least one other group:

- News and weather information (38%)
- Hobbies and interest information (36%)
- Travel/holiday information (31%)
- General searching information (67%)

Blind or visually impaired users were more likely than mobility impaired users to be finding news and weather information (37%).

Figure 15 Information finding activities carried out online by disability group

	% Mobility Impaired	% Hearing Impaired	% Blind/ Visually Impaired	% Multiple Disability	% Other Disability
Any information finding	74	78	76	74	78
Finding out news and weather information	30	**40**	**37**	32	**38**
Finding out information on public services provided by national or local government of from businesses	22	**27**	22	21	25
Finding information related to hobbies and interests	30	**38**	34	33	**36**
Finding out information on travel/holidays/ what's on in local area	27	**34**	25	25	**31**
General searching information	61	63	63	60	**67**

Significant differences are emboldened
Source: Q.5 And which of the following activities, if any, do you do when you use the internet?

Base: All with Internet access at home MI n = 1105, HI n = 391, B/VI n = 322, MD n = 575, O n = 728

Shopping/ transaction activities

Figure 16 shows there was less variance by disability group for shopping and transacting activities with the exception of home internet users with an 'other' disability. This group were significantly more likely to be using for banking or paying bills, selling goods or accessing government services online.

Figure 16 Shopping/transacting activities carried out online by disability group

	% Mobility Impaired	% Hearing Impaired	% Blind/ Visually Impaired	% Multiple Disability	% Other Disability
Any shopping/ transacting	57	57	58	57	**63**
Banking/paying bills	29	34	32	29	**36**
Grocery Shopping	21	20	25	22	21
Shopping for goods (not grocery) (any)	41	40	39	39	44
Selling goods	11	13	12	11	**18**
Accessing government services online e.g. council tax, benefits etc.	16	20	15	16	**23**

Significant differences are emboldened
Source: Q.5 And which of the following activities, if any, do you do when you use the internet?
Base: All with Internet access at home MI n = 1105, HI n = 391, B/VI n = 322, MD n = 575, O n = 728

Entertainment activities

As figure 17 shows, usage of entertainment activities varied by disability group where, again, those home internet users with a hearing impairment, blind or visual impairment or 'other' disability, were more likely to be using the internet more than other disability groups.

Blind or visually impaired people and those with other disabilities were using the following more than at least one other group:

- Watching TV programmes or films
- Watching video clips
- Listening to the radio
- Downloading music/movies

Hearing impaired users were also more likely to be watching TV programmes or films online.

Figure 17 Entertainment activities carried out online by disability group

	% Mobility Impaired	% Hearing Impaired	% Blind/ Visually Impaired	% Multiple Disability	% Other Disability
Any entertainment	44	49	**54**	50	**53**
Watching TV programmes or films	19	**29**	**24**	21	**30**
Watching video clips (e.g. YouTube, etc.)	20	24	**32**	22	**31**
Listening to the radio/music	13	19	**22**	15	**22**
Downloading music/movies	13	18	**25**	16	**21**
Playing games online	21	19	24	24	22

Significant differences are emboldened
Source: Q.5 And which of the following activities, if any, do you do when you use the internet?
Base: All with Internet access at home MI n = 1105, HI n = 391, B/VI n = 322, MD n = 575, O n = 728

6.3.2 Activities carried out, differences by age and social class

There were differences in activities carried out by age and by social class both amongst disabled and non-disabled people. This suggests that for some activities, age and social class can determine if they are carried out, possibly more than the type of disability.

As shown in figure 18, ABC1 users, both disabled and non-disabled, were significantly more likely to carry out a broad range of activities than C2DE social classes. This is with the exception of finding information for ABC1 non-disabled users.

Figure 18 Activities carried – differences by social class

	Social Class			
	Disabled		Non-Disabled	
	ABC1	C2DE	ABC1	C2DE
Work/study	**32%**	13%	**49%**	28%
Communicating	**69%**	58%	**75%**	64%
Finding information	**82%**	72%	80%	76%
Shopping/making transactions	**68%**	54%	**73%**	59%
Entertainment	**52%**	48%	**61%**	55%

Significant differences are emboldened
Source: Q.5 And which of the following activities, if any, do you do when you use the internet?
Base: All with internet access at home Disabled ABC1 n= 814, C2DE n=1520, Non-disabled ABC1 n= 665, C2DE n=688,

In figure 19, disabled and non-disabled users aged under 65 were significantly more likely to carry out broad activities than users aged 65+. Again, this was with the exception of finding information for under 65 year old non-disabled users.

Figure 19 Activities carried – differences by age

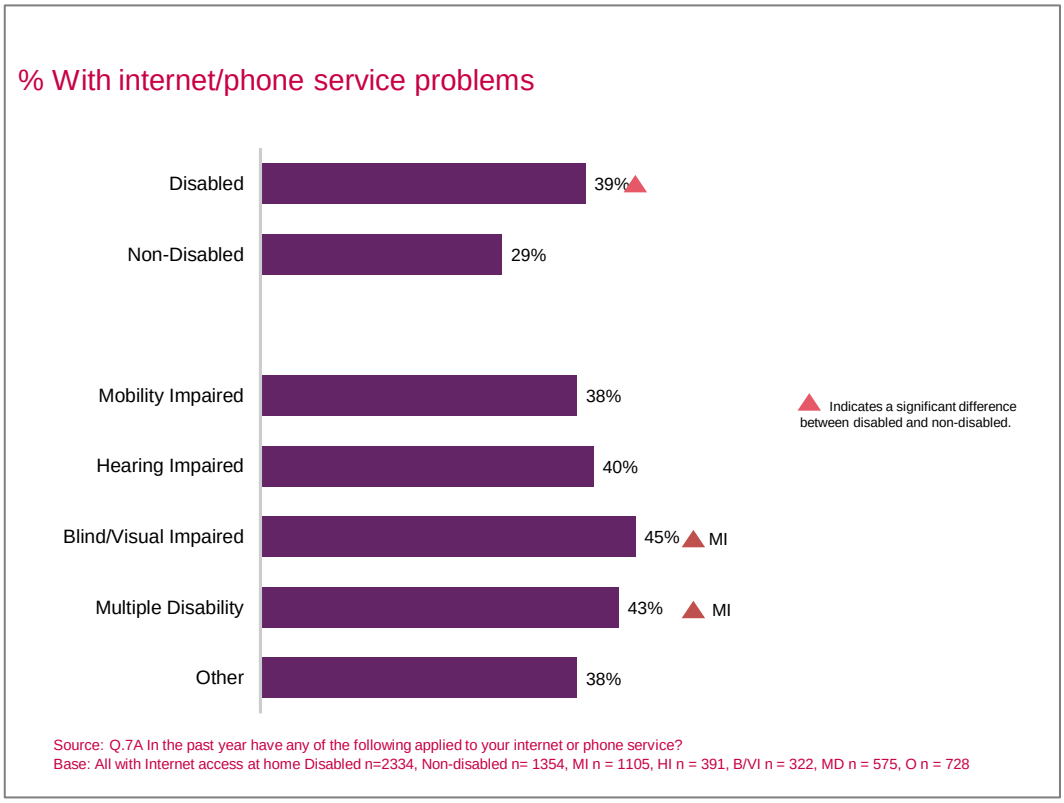
	Age			
	Disabled		Non-Disabled	
	<65	65+	<65	65+
Work/study	**26%**	4%	**42%**	9%
Communicating	**66%**	51%	**71%**	58%
Finding information	**79%**	67%	79%	73%
Shopping/making transactions	**65%**	46%*	**68%**	49%
Entertainment	**57%**	29%	**61%**	28%

Significant differences are emboldened
Source: Q.5 And which of the following activities, if any, do you do when you use the internet?
Base: All with internet access at home Disabled <65 n= 1564,65+ n= 770, Non-disabled <65 n= 1203,65+ n= 150

6.4 Problems encountered with internet or phone services in past year

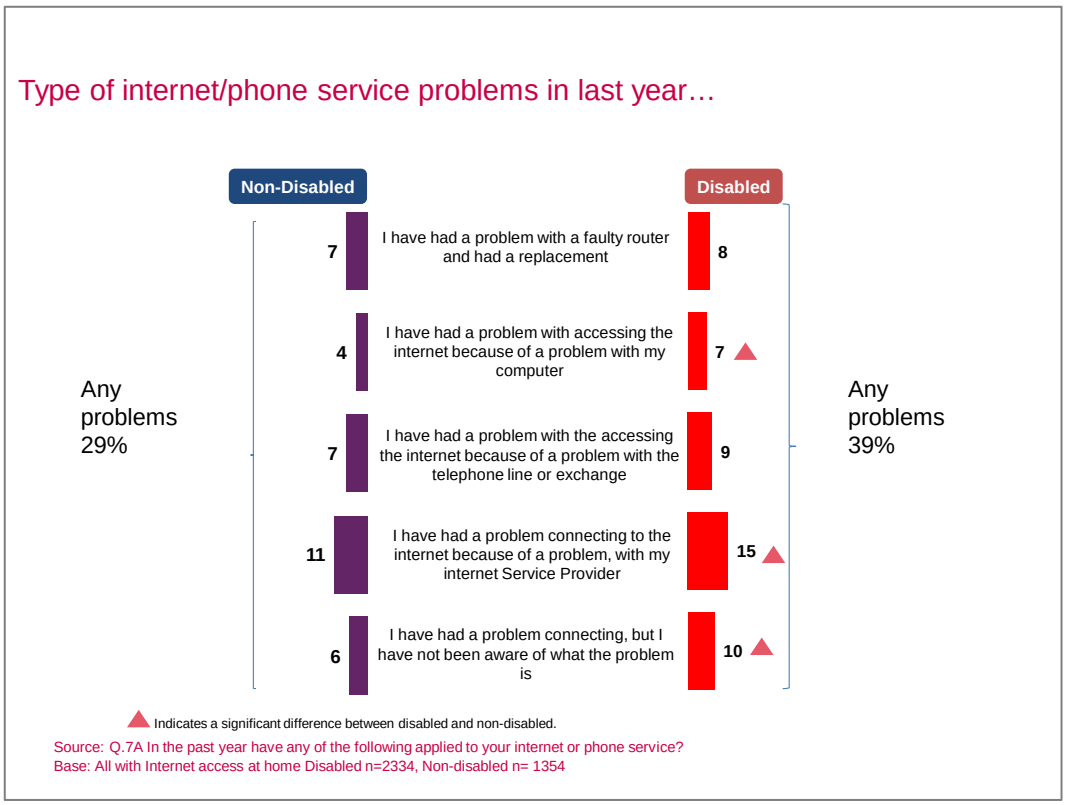
Potential problems associated with internet or phone services were shown to respondents to assess whether they had encountered these in the past year. As figure 20 shows, disabled home internet users (39%) were more likely than non-disabled users (29%) to have encountered any of these problems. Specifically, blind or visually impaired users (45%) and those with multiple disabilities (43%) were more likely to have encountered these problems (a significant difference to mobility impaired users).

Figure 20



As figure 21 shows, the most likely problem encountered by both disabled and non-disabled users was a problem connecting to the internet attributable to their internet service provider (ISP). This problem was encountered to a significantly greater extent by disabled users (15%) than non-disabled users (11%). Also encountered to a greater extent were access problems associated with the computer (7% of disabled users and 4% of non-disabled users) and an unknown problem (10% of disabled users and 6% of non-disabled users).

Figure 21

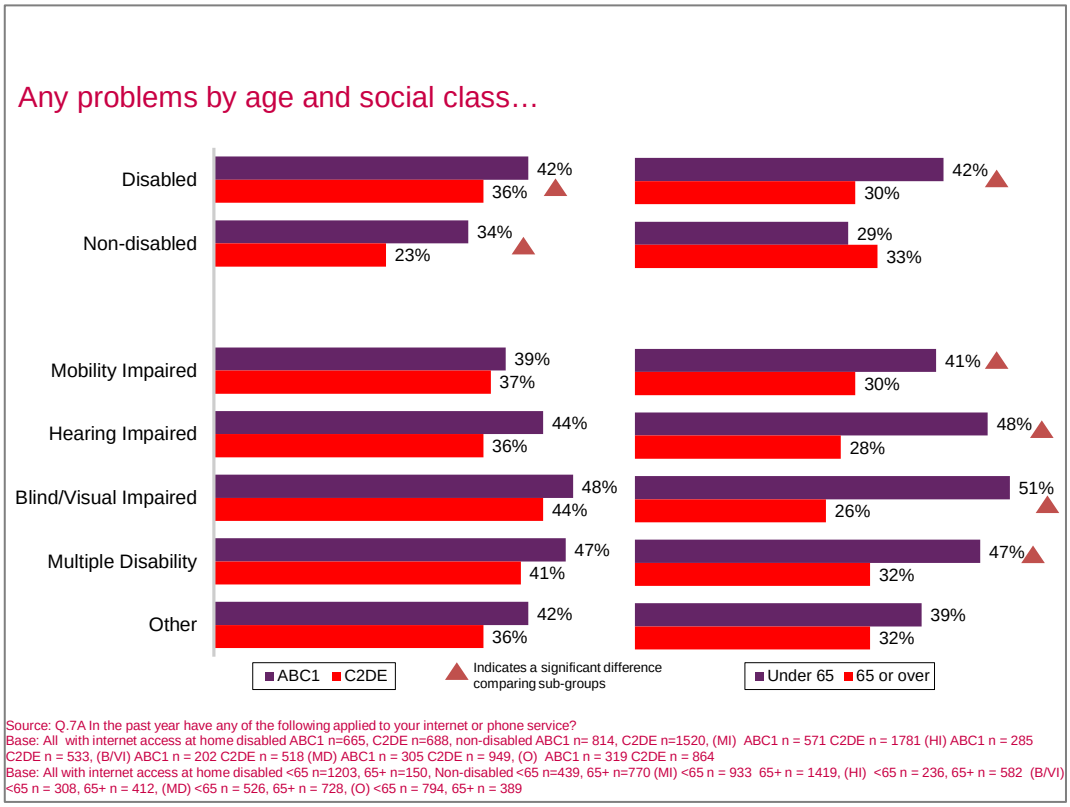


Problems were no more likely to be experienced by users with specific types of disabilities, with the exception of blind or visually impaired users who were more likely to have had a faulty router replaced (11%). However, there were significantly different experiences found for both those from differing social classes and in particular age groups, as shown in figure 22.

By social class, ABC1 users, both disabled (42%) and non-disabled (34%), were more likely to encounter internet or phone service problems than C2DEs (36% of disabled users and 23% of non-disabled users) as shown in figure 22.

By age, disabled users aged under 65 (42%) were significantly more likely to encounter internet or phone service problems than 65+ disabled users (30%) demonstrated in figure 22. However, amongst non-disabled users, problems were encountered equally by users and non-users. It is possible that those aged 65+ may be getting support from their personal network of friends or family.

Figure 22



Source: Q.7A In the past year have any of the following applied to your internet or phone service?
Base: All with internet access at home disabled ABC1 n=665, C2DE n=688, non-disabled ABC1 n= 814, C2DE n=1520, (MI) ABC1 n = 571 C2DE n = 1781 (HI) ABC1 n = 285 C2DE n = 533, (B/VI) ABC1 n = 202 C2DE n = 518 (MD) ABC1 n = 305 C2DE n = 949, (O) ABC1 n = 319 C2DE n = 864
Base: All with internet access at home disabled <65 n=1203, 65+ n=150, Non-disabled <65 n=439, 65+ n=770 (MI) <65 n = 933 65+ n = 1419, (HI) <65 n = 236, 65+ n = 582 (B/VI) <65 n = 308, 65+ n = 412, (MD) <65 n = 526, 65+ n = 728, (O) <65 n = 794, 65+ n = 389

Overall, the problems encountered were almost universally internet-related, with 96% of disabled and 98% of non-disabled users experiencing problems citing that they were internet related. Problems with making phone calls were experienced, at a significantly higher level amongst disabled users with problems (32%) than non-disabled users with problems (25%). This is shown in figure 23.

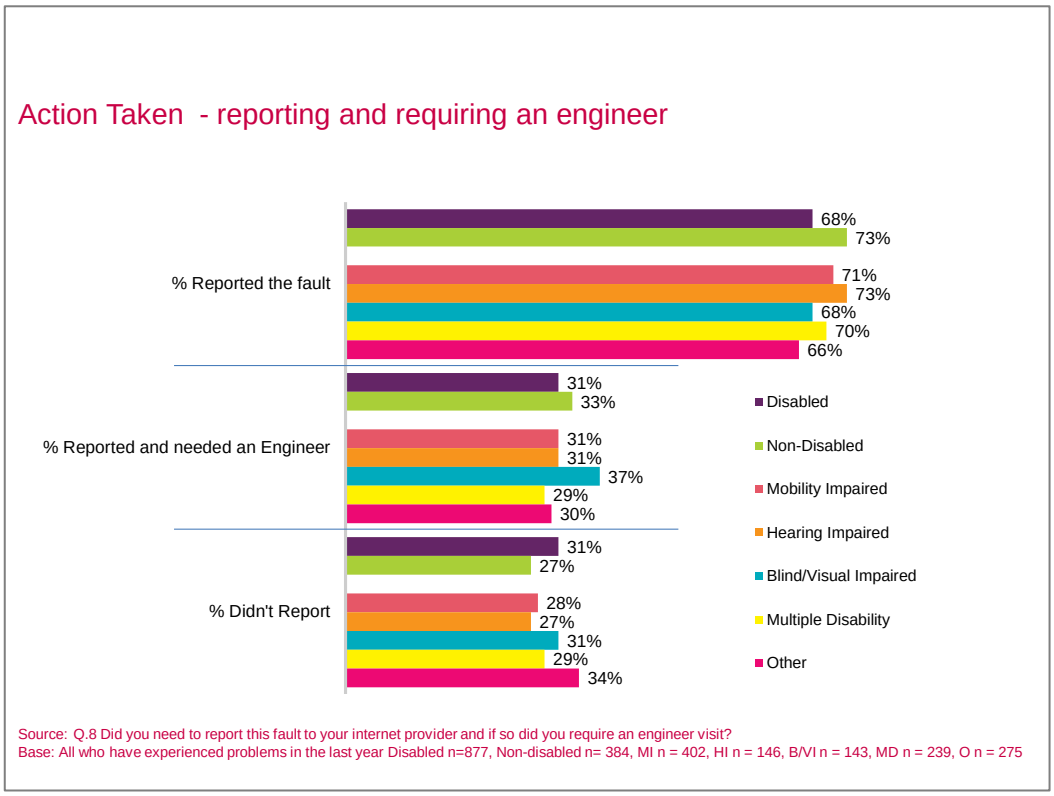
Figure 23 Internet and/or phone associated problems

	Non-Disabled	Disability					
		Any	Mobility Impaired	Hearing Impaired	Blind/Visual Impaired	Multiple Disability	Other
Any Internet	98%	96%	94%	94%	94%	94%	**98%**
Any phone calls	25%	**32%**	29%	37%	33%	34%	34%

Significant differences are emboldened
Source: Q.7A In the past year have any of the following applied to your internet or phone service?
Base: All with Internet access at home Disabled n=2334, Non-disabled n= 1354, MI n = 1105, HI n = 391, B/VI n = 322, MD n = 575, O n = 728

Respondents were asked if they had reported the fault to the ISP and if they subsequently needed an engineer. Similar experiences were seen across disabled and non-disabled groups as well as within disability type as show in figure 24. Over two-thirds of users experiencing problems had reported the fault (68% of disabled and 73% of non-disabled people). Around half of those reporting the fault (equating to one third of those with a fault) needed an engineer (31% of disabled and 33% of non-disabled people).

Figure 24



Source: Q.8 Did you need to report this fault to your internet provider and if so did you require an engineer visit?
Base: All who have experienced problems in the last year Disabled n=877, Non-disabled n= 384, MI n = 402, HI n = 146, B/VI n = 143, MD n = 239, O n = 275

6.5 Impact of internet or phone service problems on activities

6.5.1 Anticipated effect of not having the Internet for a day or more

Respondents were asked about the anticipated impact of not having the internet for one day or more on their online activities. The impact was measured using a scale of: would be unable to carry out the activity; would have great difficulty in carrying out the activity; would have some difficulty in carrying out the activity; the internet problem would have no impact at all on them.

The impact on disabled and non-disabled home internet users was very similar with no significant differences in impact between each group. The impact is shown in figure 25 (work/study and communicating), figure 26 (finding information), figure 27 (shopping/making transactions) and figure 28 (entertainment).

Some entertainment uses were the activities where users anticipated being impacted the most. This was where 30% or more users anticipated that they would be unable to carry out the activity. This included watching video clips (34% of non-disabled people and 33% of disabled people), downloading music or movies (38% of non-disabled people and 36% of disabled people) or playing online games (40% of non-disabled people and 41% of disabled people) as shown in figure 28). Other activities anticipated as being unable to carry out by 30% or more were:

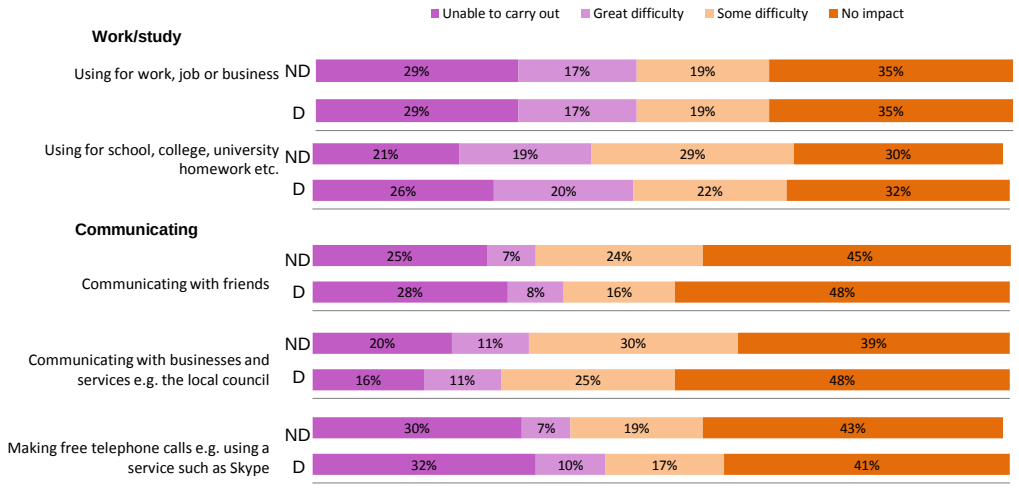
- Making free telephone calls (30% of non-disabled people and 32% of disabled people) (figure 25)
- General searching for information (25% of non-disabled people and 30% of disabled people) (figure 26)
- Selling goods (39% of non-disabled people and 32% of disabled people) (figure 27)

Conversely, activities where users expected a lesser degree of impact (less than 30% who were unable to carry out for each activity) were the following, perhaps because this information could be sourced elsewhere or it was not a priority and could wait for a day or more:

- Finding out news and weather information (17% of non-disabled people and 13% of disabled people) (figure 26)
- Finding out information on public services provided by government or businesses (16% of non-disabled people and 16% of disabled people) (figure 26)
- Listening to radio or music (18% of non-disabled people and 13% of disabled people) (figure 28)

Figure 25

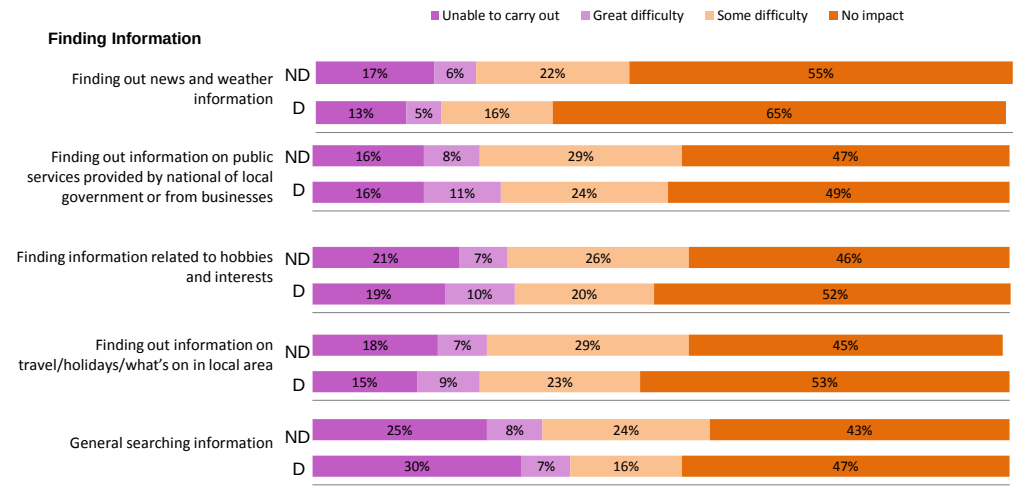
Anticipated effect of not having internet for a day or more



Source: Q.6 And thinking of these things that you do with your internet service, I want to understand what you would do if your internet service was not available for a day or more?
Base: all who carry out each activity

Figure 26

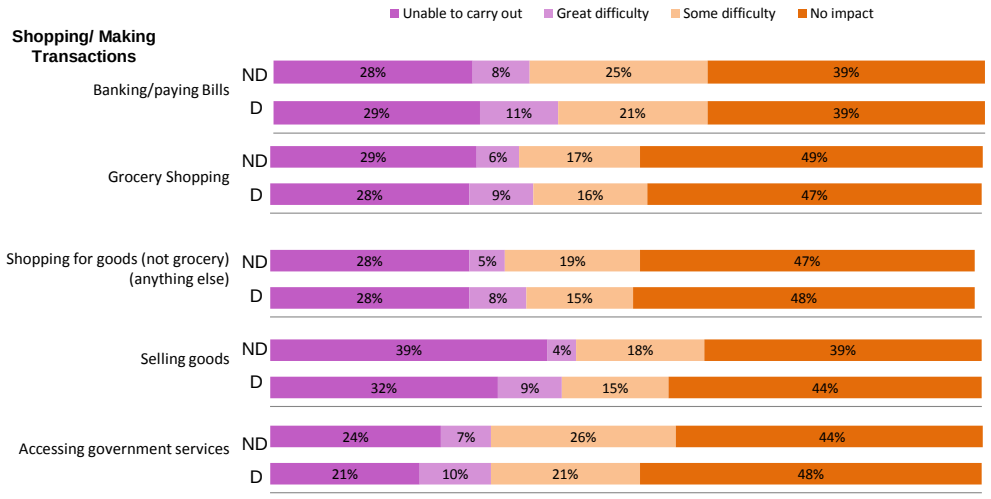
Anticipated effect of not having internet for a day or more



Source: Q.6 And thinking of these things that you do with your internet service, I want to understand what you would do if your internet service was not available for a day or more?
Base: all who carry out each activity

Figure 27

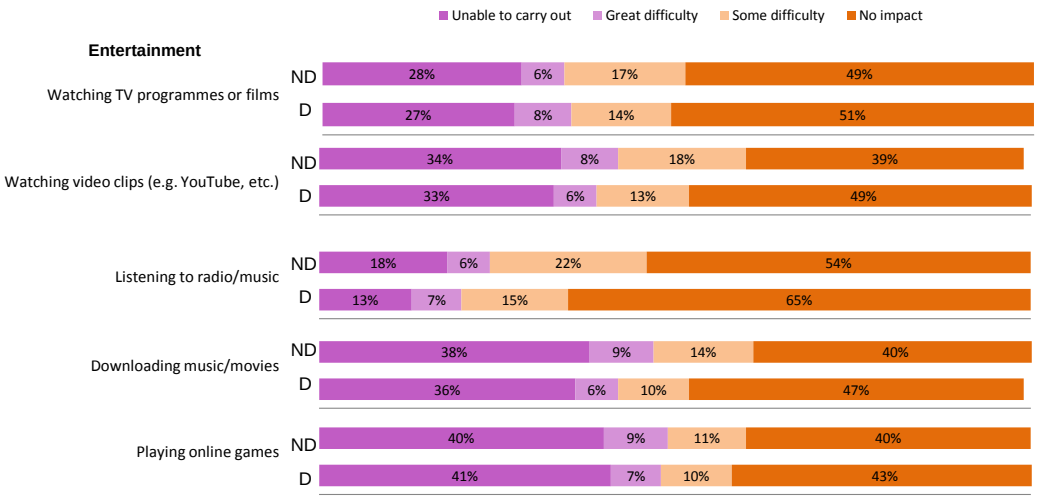
Anticipated effect of not having internet for a day or more



Source: Q.6 And thinking of these things that you do with your internet service, I want to understand what you would do if your internet service was not available for a day or more?
Base: all who carry out each activity

Figure 28

Anticipated effect of not having internet for a day or more



Source: Q.6 And thinking of these things that you do with your internet service, I want to understand what you would do if your internet service was not available for a day or more?
Base: all who carry out each activity

6.5.2 Actual impact of problem with internet services

Where a respondent used the internet for a particular activity and had experienced a problem with their service, they were asked about the impact on each of these activities. The impact was measured using a scale of: unable to carry out the activity; had great difficulty in carrying out the activity; had some difficulty in carrying out the activity; the internet problem had no impact.

As with anticipated impact, actual impact on disabled and non-disabled home internet users was very similar with no significant differences in impact between each group. The impact is shown in figure 29 (work/study and communicating), figure 30 (finding information), figure 31 (shopping/making transactions) and figure 32 (entertainment).

Again, entertainment online uses were the activities where users were impacted most. This was where 40% or more users were unable to carry out the activity. This included watching video clips (39% of non-disabled people and 41% of disabled people), downloading music or movies (45% of non-disabled people and 43% of disabled people)or playing online games (47% of non-disabled people and 48% of disabled people) (as shown in figure 32). Other activities which online users were unable to carry out by 40% or more were:

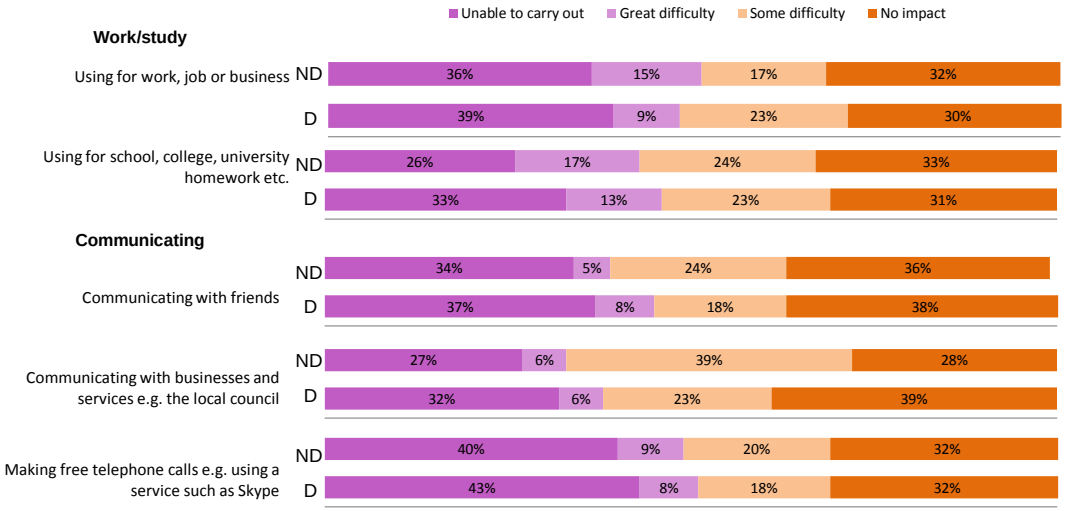
- Making free telephone calls (40% of non-disabled people and 43% of disabled people) (figure 29)
- Selling goods (40% of non-disabled people and 37% of disabled people) (figure 31)

Activities which were impacted less (less than 30% of disabled or non-disabled people for each activity who were unable to carry out the activity) were the following:

- Using for school or college (26% of non-disabled people and 33% of disabled people) (figure 29)
- Communicating with businesses and services (27% of non-disabled people and 32% of disabled people) (figure 29)
- Finding out news and weather information (29% of non-disabled people and 24% of disabled people) (figure 30)
- Finding out information on public services provided by government or businesses (21% of non-disabled people and 28% of disabled people) (figure 30)
- Finding out information on travel and holidays (24% of non-disabled people and 28% of disabled people) (figure 30)
- Listening to radio or music (26% of non-disabled people and 27% of disabled people) (figure 32)

Figure 29

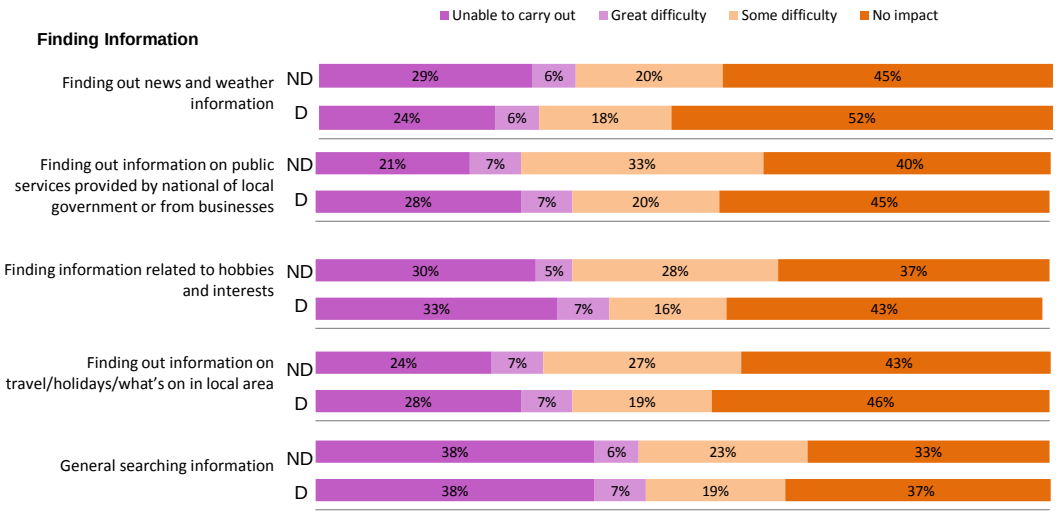
Actual impact of faults



Source: Q.10 When you had a fault with your internet services, what was the impact on the things that you mentioned that you do on the internet?
Base: All with Internet access at home for ... and have had a problem

Figure 30

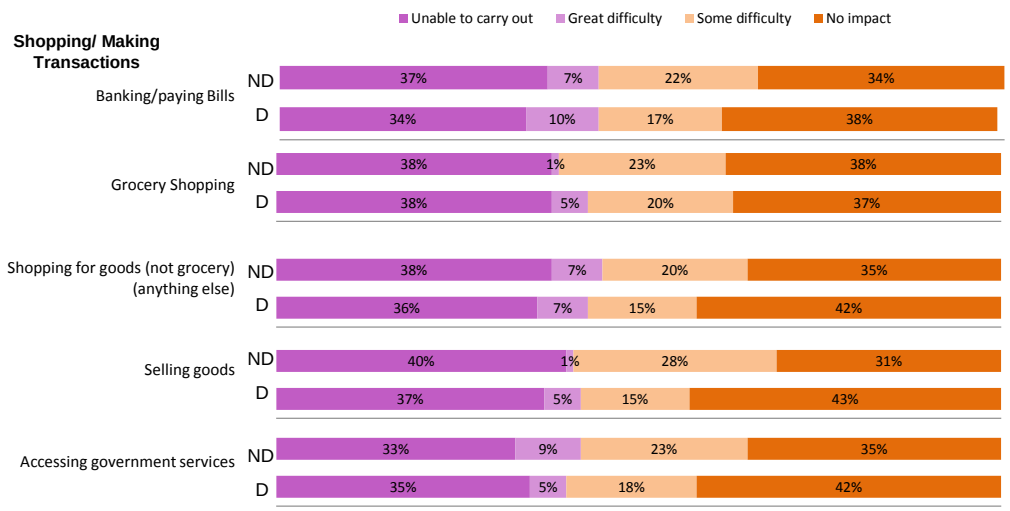
Actual impact of faults



Source: Q.10 When you had a fault with your internet services, what was the impact on the things that you mentioned that you do on the internet?
Base: All with Internet access at home for ... and have had a problem

Figure 31

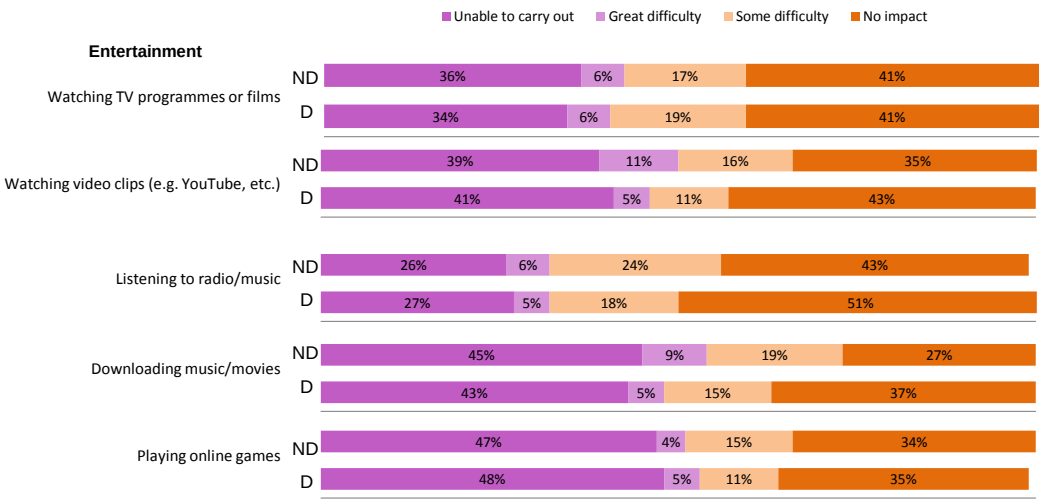
Actual impact of faults



Source: Q.10 When you had a fault with your internet services, what was the impact on the things that you mentioned that you do on the internet?
Base: All with Internet access at home for ... and have had a problem

Figure 32

Actual impact of faults



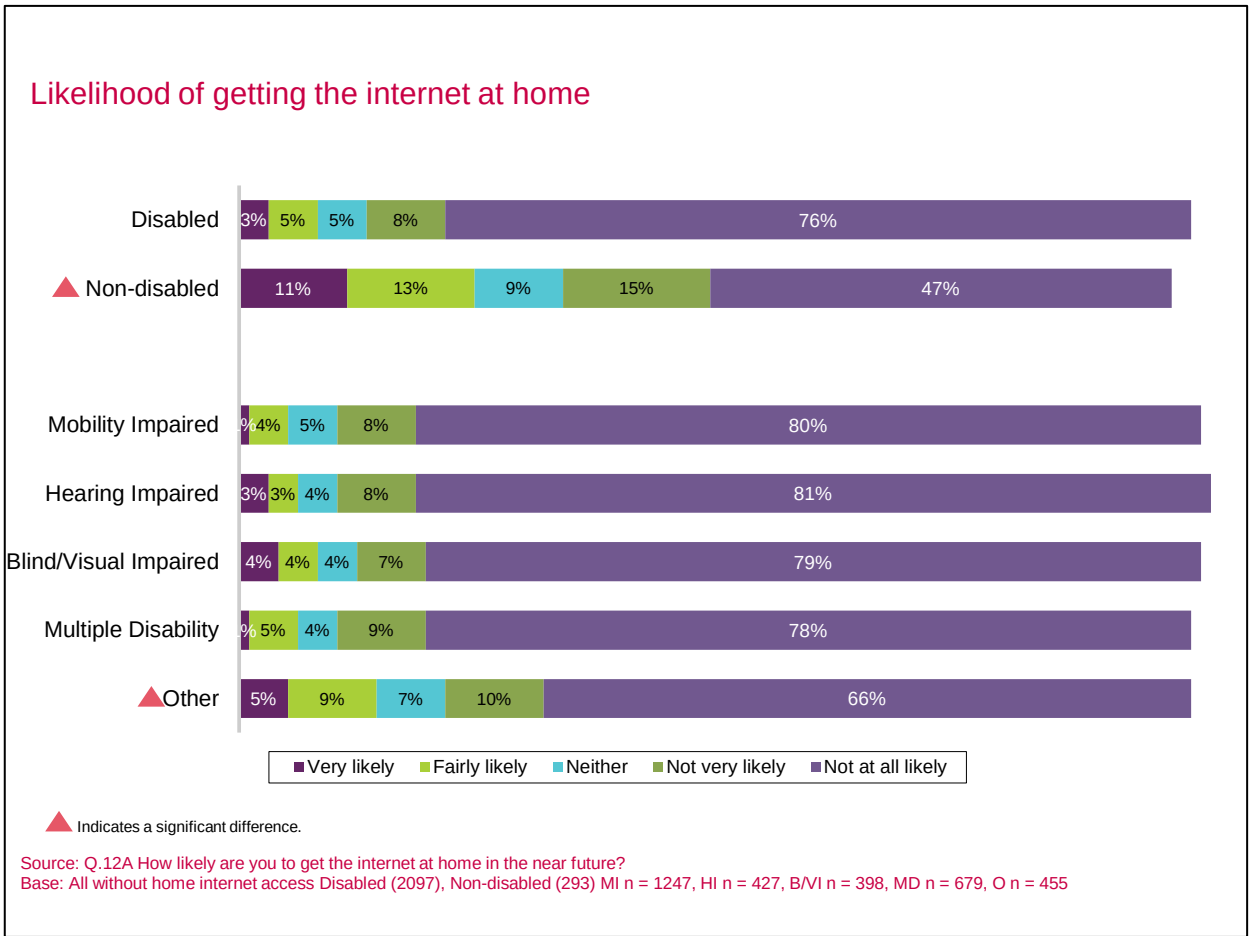
Source: Q.10 When you had a fault with your internet services, what was the impact on the things that you mentioned that you do on the internet?
Base: All with Internet access at home for ... and have had a problem

6.6 Internet access intentions

Disabled and non-disabled people without home internet access were asked about their likelihood of getting the internet at home in the future. This was measured on a five point likelihood scale. As shown in figure 33, non-disabled people without internet access were significantly more likely (24% very or fairly likely) to want to get the internet compared to their disabled counterparts (8%).

The likelihood levels were similar by disability type with the exception of those with 'other' disabilities where there was a greater propensity to get home access (14%), attributable to under 65 year olds with an 'other' disability, where 10% were very likely.

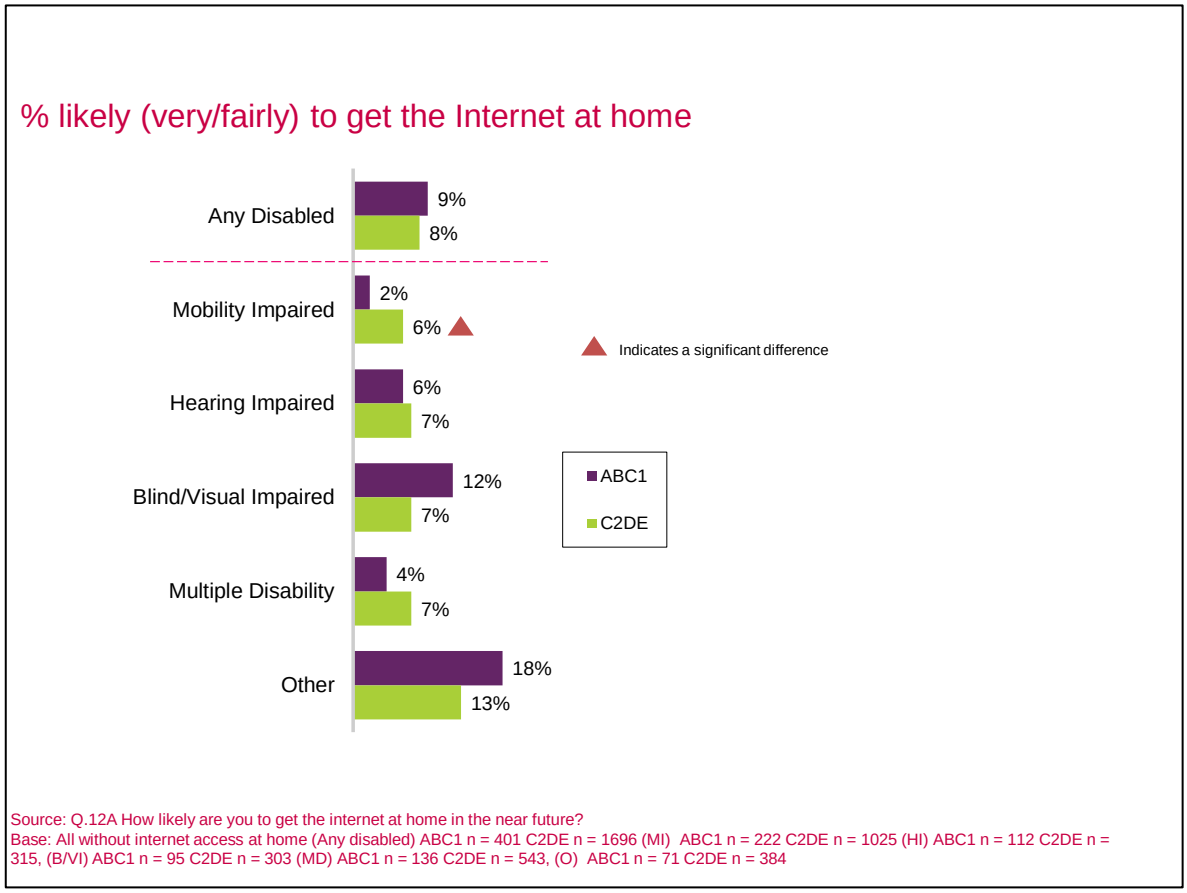
Figure 33



Source: Q.12A How likely are you to get the internet at home in the near future?
Base: All without home internet access Disabled (2097), Non-disabled (293) MI n = 1247, HI n = 427, B/VI n = 398, MD n = 679, O n = 455

[By social class], marginal differences were found between ABC1 and C2DE disabled non-home internet users in their likelihood to get home internet access. Only mobility impaired C2DE non-users (6%) were significantly more likely than ABC1s (2%) to be likely to get the internet in the future. Amongst non-disabled people without internet access, there were significantly more ABC1s (40%) than C2DEs (20%) who were likely to get future home internet access. This is shown in figure 34.

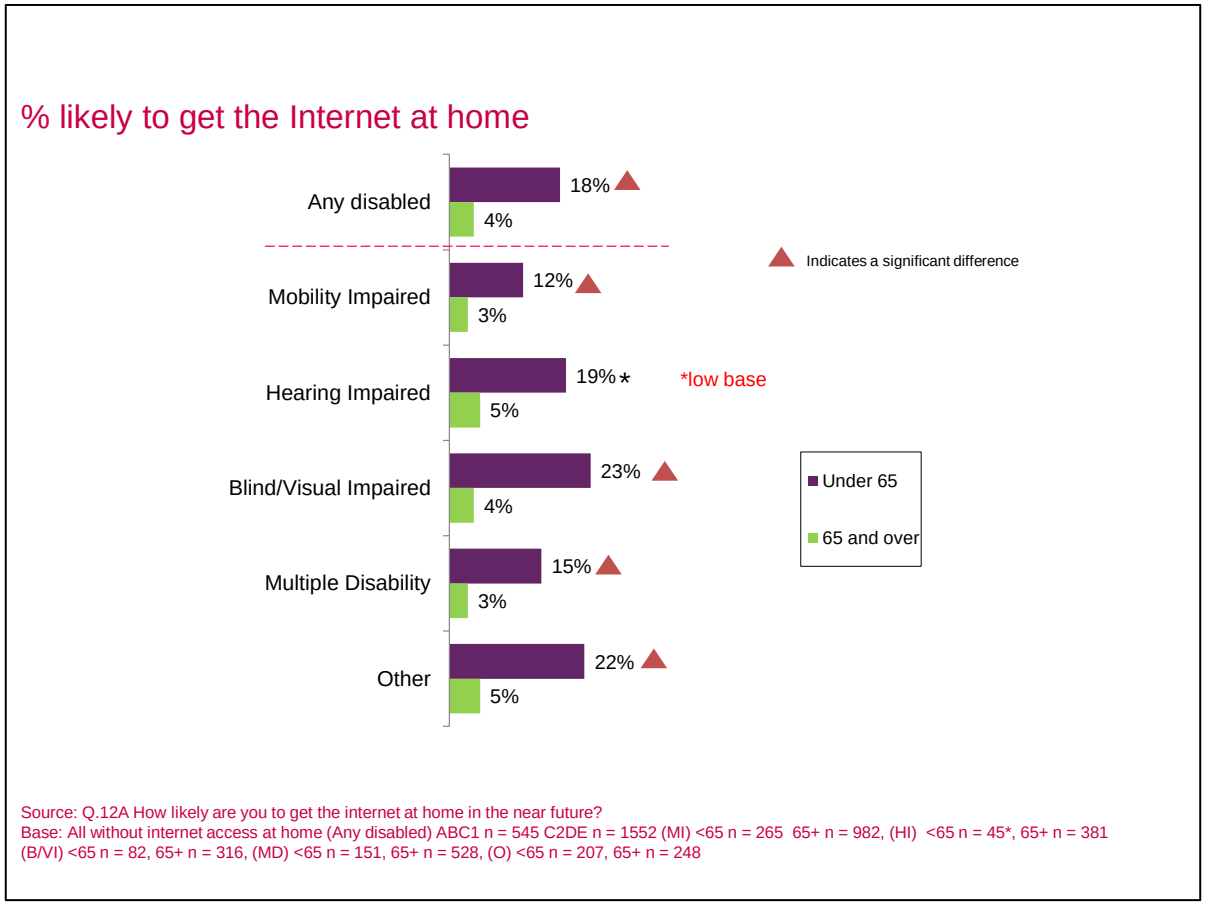
Figure 34



Source: Q.12A How likely are you to get the internet at home in the near future?
Base: All without internet access at home (Any disabled) ABC1 n = 401 C2DE n = 1696 (MI) ABC1 n = 222 C2DE n = 1025 (HI) ABC1 n = 112 C2DE n = 315, (B/VI) ABC1 n = 95 C2DE n = 303 (MD) ABC1 n = 136 C2DE n = 543, (O) ABC1 n = 71 C2DE n = 384

By age, under 65 year olds were significantly more likely to think they would get home internet access compared to 65+ year olds for both disabled and non-disabled groups as well as across all disability types. This is shown in figure 35.

Figure 35



Source: Q.12A How likely are you to get the internet at home in the near future?
Base: All without internet access at home (Any disabled) ABC1 n = 545 C2DE n = 1552 (MI) <65 n = 265 65+ n = 982, (HI) <65 n = 45*, 65+ n = 381 (B/VI) <65 n = 82, 65+ n = 316, (MD) <65 n = 151, 65+ n = 528, (O) <65 n = 207, 65+ n = 248

6.7 Drivers and barriers to internet use

6.7.1 Reasons for not having the internet at home

The reasons for not having home internet access were asked of people currently without home internet access via an unprompted question. As shown in figure 36, the top three reasons for not having access amongst non-home internet users were:

- Not interested in the internet (68% of disabled and 45% of non-disabled)
- It is too expensive (12% of disabled and 21% of non-disabled)
- I don't know how to use the internet (10% of disabled and 5% of non-disabled)

In each case significant differences were detected between disabled and non-disabled people.

This indicates that the reasons for non-home access are not so much barriers as a lack of interest in it, particularly for disabled non-users. Additionally, that cost is less of a barrier to disabled people than non-disabled people suggests disabled people are not disadvantaged to any greater extent than non-disabled people.

As shown in figure 36, all other reasons for not having the internet at home were mentioned by 7% or less.

Figure 36

Reasons for not having internet at home

Cost	Disabled	Non-disabled
It is too expensive	12%	21% ▲
I can't justify the cost of it / I need other things more	3%	3%
I can't afford the regular payment to the internet service provider	1%	3%
I can't afford a computer	3%	4%

Knowledge/Concerns	Disabled	Non-disabled
I don't really know what it does	4%	3%
I don't know where to get it from	1%	1%
I don't know how to use the internet	10% ▲	5%
I don't know how to use a computer	7%	5%
I am unable to use it because of my disability	2% ▲	<1%
I am worried about security / ID theft / fraud/privacy issues	1%	1%

Internet & Usage	Disabled	Non-disabled
I am not interested in the internet	68% ▲	45%

Access	Disabled	Non-disabled
I am planning on moving house	<1%	3%
I don't have a landline	1%	1%
I am satisfied with using the internet elsewhere	1%	2%

▲ Indicates a significant difference.

Indicates top three

Source: Q.12B Why do you not currently have the internet at home? (unprompted)
Base: All without internet access at home Disabled n= 2097, Non-disabled n= 293

6.7.2 Activities would like to do if had home internet access

People without home internet access were asked what they would like to do but cannot currently because of non-home access. This was asked without prompted answers. As shown in figure 37, the majority state there is nothing they would like to do and this is significantly higher for disabled people (82%) compared to non-disabled people (77%). This reinforces that non-home internet access is largely out of choice rather than there being other barriers, particularly for disabled people.

A list of possible activities was provided to respondents to measure what they might be interested in, and interest in each individual activity was a low 4% or less. The activities were grouped into categories and the interests in these combined categories are provided in figure 37. This shows greater interest in communication (4%) and finding information (5%) amongst disabled people without internet access, albeit at low levels. Greater, but still quite low, interest was found amongst non-disabled people without internet access for communicating (8%), finding information (8%) and also entertainment (4%).

Figure 37 Activities would like to do if had home internet access

	Disabled %	Non-disabled %
Work/Study	1	3
Communication	4	8
Finding Information	5	8
Shopping/Making Transactions	4	6
Entertainment	1	4
Nothing	82	77

Significant differences are emboldened
Source: Q.14 Is there anything that you would like to do currently, but can't do because you don't have access to the internet? If yes, what are these?
Base: All without internet access at home Disabled n=2097, Non-disable n=293

There were no significant differences by disability type and interest in online activities.

6.7.3 Perceptions of missing benefits due to no home internet access

Perceptions of missing benefits because of no home internet access were also measured. This was asked without prompted answers. Similar to desired activities, the majority of non-home internet users did not perceive any missing benefits, where 78% of disabled and a significantly lower 67% of non-disabled people without home internet said this as shown in figure 38.

For each activity a low 2% or less mentioned each, therefore answer categories were combined. A similar proportion of non-home internet users would like to communicate using the internet (5% of disabled and 7% of non-disabled non-home internet users), transact via the internet (5% of disabled and 6% of non-disabled non-home internet users) or find information on the internet (4% of disabled and 7% of non-disabled non-home internet users).

Figure 38 Perceived missing benefits because of no home internet access

	Disabled %	Non-disabled %
Communicating	5	7
Transacting	5	6
Finding Information	4	7
Nothing	**78**	67

Significant differences are emboldened
Source: Q.15 Overall, do you think you are missing any benefits because you do not have internet access at home? What are they?
Base: All without internet access at home Disabled n= 2097, Non-disabled n= 293

Appendix

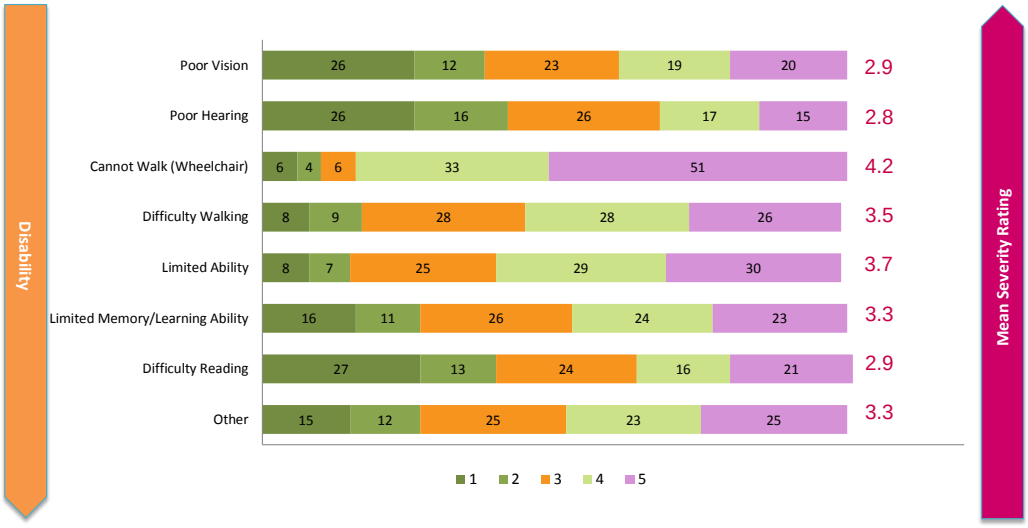
A. Profile of respondents

Age and social class

	Non-disabled	Disabled	Mobility impaired	Hearing impaired	Blind/visually impaired	Multiple disability	Other
Under 65	88%	55%	46%	37%	50%	49%	73%
65+	12%	45%	54%	63%	50%	51%	27%
ABC1	52%	31%	27%	38%	33%	27%	32%
C2DE	48%	69%	63%	62%	67%	73%	68%

Severity ratings

Severity Ratings of each disability type (%)



Source: Q.2A Could you tell me how severe your disability is using a scale of 1 to 5 where 5 means on your worst day your disability is extreme and 1 where you disability is relatively mild.

B. Type of internet access

To understand internet access type, whether in-home or out of home, a detailed list of possible access methods was shown to respondents and they selected which access method they used. The types of access and the proportion accessing each is shown in figure 39.

Non-disabled people were significantly more likely to use all access methods than disabled people. Differences were particularly marked for using a mobile device and using in public spaces.

Emboldened figures are used to show significantly higher internet access levels amongst disability groups.

Figure 39 Type of internet access in and out of home

	% Disabled	% Non-disabled	% Mobility Impaired	% Hearing Impaired	% Blind/ Visually Impaired	% Multiple Disability	% Other
In home - WiFi	45	72	39	43	39	38	**52**
In home - Ethernet	10	14	10	9	8	9	**11**
In home - 3G/4G	14	**26**	10	9	13	11	**21**
In home - dial-up	5	6	4	3	4	4	**5**
Travelling - WiFi	4	7	3	4	3	3	**5**
Outside - 3G/4G	12	**31**	8	9	9	9	**20**
Internet - At Work	5	**18**	3	**6**	**6**	2	**8**
Internet - Friends/Family's House	4	**8**	3	3	2	3	**6**
Public Place - Wi-Fi	5	**9**	3	4	4	4	**7**
Public Place - Ethernet	2	3	1	1	1	1	**3**
Public Place - 3G/4G	4	**10**	2	4	3	3	**7**

Significant differences emboldened
Source: Q.3 Do you have access to the internet in any of the following?
Base: All Disabled n=4431, non-disabled n = 1646, IM n = 2352, HI n = 818, B/VI n = 720, MD n = 1254, O n = 1183

C. Questionnaire

For show cards please allow large font options and if the respondent has difficulty reading, that codes are read out to respondents.

ASK ALL
Q1. Which of these, if any, limit your daily activities or the work you can do? SHOW CARD A OR READ OUT
SELECT ALL THAT APPLY

1 Poor vision, partial sight or blindness
2 Poor hearing, partial hearing or deafness
3 Cannot walk at all/ uses a wheelchair
4 Cannot walk very far or manage stairs or can only do so with difficulty
5 Limited ability to manipulate items, grasp or reach
6 Memory or ability to concentrate, learn or understand
7 Difficulty in reading other than a visual impairment (for example dyslexia)
8 Other illness/ health problems which limit your daily activities/ work you can do **(WRITE IN)**
_____
_
9 None of these **CLOSE**

(ASK ALL WHO ARE DISABLED AT Q1 CODES 1-8)
Q2A. Could you tell me how severe your disability is using a scale of 1 to 5 where 5 means on your worst day your disability is extreme and 1 where your disability is relatively mild. <u>You can choose any number between 1 and 5</u>, please use these guides to help you score.

If you experience more than one disability, please allocate a score to describe how your day to day life is affected by your most severe disability. SHOW CARD B/READ OUT
1 1 - mild
2 2
3 3
4 4
5 5 - extreme

	Score 1 - mild	Score 5 - extreme
Poor vision, partial sight or blindness	Have difficulty seeing that cannot be corrected by wearing glasses	Cannot tell by the light where the windows are
Poor hearing, partial hearing or deafness	Difficulty following a conversation against background noise	Cannot hear sounds at all
Cannot walk at all/ uses a wheelchair	Can walk with an aid such as a walking stick	Cannot walk at all and use a wheelchair
Cannot walk very far or manage stairs or can only do so with difficulty	Can manage stairs/walk short distances albeit slowly or with an aid such	Severe difficultly in walking far or need a stair lift or equivalent to

	as a walking stick	manage stairs
Limited ability to reach	Can manage to use a computer keyboard	Need complete assistance from another person to manage household tasks
Memory or ability to concentrate, learn or understand	Your memory, learning or concentration abilities do not impact on your day to day life	You need to rely on other people to help you with your daily life
Difficulty in reading other than visual impairment(for example dyslexia)	Your reading abilities allow you to get by in your daily life	You need to rely on other people or technology to help you read

(ASK ALL WHO ARE DISABLED AT Q1 CODES 1-8)
Q2B. Have you had your disability since you were a child?

1. Yes
2. No

Q3. Do you have access to the internet in any of the following places?
SHOW CARD C OR READ OUT
SELECT ALL THAT APPLY

Internet access at home

1: In home internet access using a Wi-Fi (wireless) connection to broadband
2: In home internet access using a wired (Ethernet) connection to broadband
3: In home internet access using a mobile network e.g. using 3G\4G on a Smartphone\tablet\dongle
4: In home internet access using a dial-up connection to the internet i.e. you cannot make phone calls at the same time (e.g. a modem)

Internet access outside of the home

5: Internet access while travelling using a Wi-Fi (wireless) network
6: Internet access while outside of the home using a mobile network using 3G\4G on a Smartphone\tablet\dongle
7: Internet access at work or place of study
8: Internet access at a friend or family members' house
9: Internet access in a public place (e.g. café, library or day centre) using a Wi-Fi (wireless) network
10: Internet access in a public place (e.g. café, library or day centre) using a wired (Ethernet) connection to broadband
11: Internet access in a public place (e.g. café, library or day centre) using a mobile network e.g. using 3G/4G on a Smartphone\tablet\dongle

Email

12: A Home\personal email address

14: A Work email address

15: None of these\Don't access the internet

INTERNET AT HOME SECTION

ASK ALL WITH INTERNET AT HOME (Q3 CODES 1-4). OTHERS GO TO Q12B

Q4 Do you receive your internet services as part of a package (provided by the same supplier) along with telephone and/or TV services or is your broadband a standalone service separate from a telephone and/or TV package?

1 As part of a package
2 As a standalone service

ASK ALL WHO HAVE INTERNET SERVICES AT HOME (Q3 CODES 1-4)

Q5. And which of the following activities, if any, do you do when you use the internet?

SHOW CARD D OR READ OUT
SELECT ALL THAT APPLY

A	Using for work, job or business	1
B	Using for school, college, university homework etc	2
	Communicating	
C	Communicating with friends via email, online chat rooms or social network sites (e.g. Facebook, MySpace)	3
D	Communicating with businesses and services e.g. the local council	4
E	Making telephone calls (VOIP) e.g. Skype	5
	Finding information	
F	Finding out news and weather information	6
G	Finding out information on public services provided by national or local government or from businesses	7
H	Finding information related to hobbies and interests	8
I	Finding out information on travel/holidays/what's on in local area	9
J	General searching information (e.g. surfing)	10
	Shopping/making transactions	
K	Online banking/paying bills	11
L	Online shopping (grocery)	12
M	Online shopping (anything else)	13
N	Selling goods online (e.g. eBay	14
O	Accessing government services online e.g., council tax, renewing car tax, benefits etc	15
	Entertainment	
P	Watching TV programmes or films (e.g. BBC i-player, 4 on demand, etc	16
Q	Watching video clips (e.g. You Tube, etc)	17
R	Listening to the radio/music	18
S	Downloading music/ movies	19
T	Playing games online	20
U	Other (please specify	21
	Don't know	22
	None of these	23

ASK ALL WHO HAVE INTERNET SERVICES AT HOME (Q3 CODES 1-4)

Q6. And thinking of these things that you do with your internet service, I want to understand what you would do if your internet service was not available for a day or more?

READ OUT ALL USED FROM Q5

SHOW CARD E/READ OUT RESPONSE CODES

		I would be unable to carry out the activity	I would have great difficulty in carrying out the activity	I would have some difficulty in carrying out the activity	It would have no impact on me being able to carry out the activity
A	Using for work, job or business	**1**	**2**	**3**	**4**
B	Using for school, college, university homework etc	**1**	**2**	**3**	**4**
Communicating					
C	Communicating with friends	**1**	**2**	**3**	**4**
D	Communicating with businesses and services e.g. the local council	**1**	**2**	**3**	**4**
E	Making free telephone calls e.g. Using a service such as Skype	**1**	**2**	**3**	**4**
Finding information					
F	Finding out news and weather information	**1**	**2**	**3**	**4**
G	Finding out information on public services provided by national or local government or from businesses	**1**	**2**	**3**	**4**
H	Finding information related to hobbies and interests	**1**	**2**	**3**	**4**
I	Finding out information on travel/holidays/what's on in local area	**1**	**2**	**3**	**4**
J	General searching information	**1**	**2**	**3**	**4**
Shopping/ making transactions					
K	Banking/ paying bills	**1**	**2**	**3**	**4**
L	Grocery shopping	**1**	**2**	**3**	**4**
M	Shopping for goods (not	**1**	**2**	**3**	**4**

	grocery) (anything else)				
N	Selling goods	**1**	**2**	**3**	**4**
O	Accessing government services online e.g. council tax, renewing car tax, benefits etc	1	2	3	4
Entertainment					
P	Watching TV programmes or films	**1**	**2**	**3**	**4**
Q	Watching video clips (e.g. You Tube, etc)	**1**	**2**	**3**	**4**
R	Listening to the radio/music/	**1**	**2**	**3**	**4**
S	Buying music/ movies	**1**	**2**	**3**	**4**
T	Playing computer games	**1**	**2**	**3**	**4**
U	Other	**1**	**2**	**3**	**4**

ASK ALL WHO HAVE INTERNET SERVICES AT HOME (Q3 CODES 1-4)

Q7A. In the past year have any of the following applied to your internet or phone service?

SHOW CARD F OR READ OUT
SELECT ALL THAT APPLY

1 I have had a problem with a faulty router and had a replacement
2 I have had a problem with accessing the internet because of a problem with my computer
3 I have had a problem with the accessing the internet because of a problem with the telephone line or exchange
4 I have had a problem connecting to the internet because of a problem, with my internet Service Provider
5 I have had a problem connecting, but I have not been aware of what the problem is
6 I have had no problems
7 Other (specify)_____

ASK ALL WITH PROBLEMS IN THE PAST YEAR (Q7A CODES 1-5 OR 7) OTHERS GO TO Q11

Q7B.Did this/these faults affect your access to the internet, your ability to make telephone calls or both?

1. Internet only
2. Making phone calls only
3. Both

ASK ALL WITH PROBLEMS IN THE PAST YEAR (Q7A CODES 1-5 OR 7)

Q8 Did you need to report this fault to your internet provider and if so did you require an engineer visit?

1 Yes – reported the fault and needed an engineer visit
2 Yes – reported the fault and did not need an engineer visit
3 No – did not report the fault
4 Can't remember

ASK ALL WITH PROBLEMS IN THE PAST YEAR (Q7A CODES 1-5 OR 7)

Q10. When you had a fault with your internet services, what was the impact on the things that you mentioned that you do on the internet? ASK FOR EACH USED AT Q5
SHOW CARD G/ READ OUT RESPONSE CODES

		I was unable to carry out this activity without my internet service	I had great difficulty in carrying out this activity without my internet service	I had some difficulty carrying out the activity without my internet service	It had no impact on my ability to carry out the activity
A	Using for work, job or business	1	2	3	4
B	Using for school, college, university homework etc	1	2	3	4
Communicating					
C	Communicating with friends	1	2	3	4
D	Communicating with businesses and services e.g. the local council	1	2	3	4
E	Making free telephone calls e.g. Using a service such as Skype	1	2	3	4
Finding information					
F	Finding out news and weather information	1	2	3	4
G	Finding out information on public services provided by national or local government or businesses	1	2	3	4
H	Finding information related to hobbies and interests	1	2	3	4
I	Finding out information on travel/holidays/what's on in local area	1	2	3	4
J	General searching information	1	2	3	4
Shopping/ making transactions					
K	Banking/ Paying bills	1	2	3	4

L	Grocery shopping	1	2	3	4
M	Shopping for goods (not grocery) (anything else)	1	2	3	4
N	Selling goods	1	2	3	4
O	Accessing government services online e.g., council tax, renewing car tax, benefits etc				
Entertainment					
P	Watching TV programmes or films	1	2	3	4
Q	Watching video clips (e.g. You Tube, etc)	1	2	3	4
R	Listening to the radio/music/	1	2	3	4
S	Buying music/ movies	1	2	3	4
T	Playing computer games	1	2	3	4

ASK ALL WHO HAVE INTERNET SERVICES AT HOME (Q3 CODES 1-4)
Q11. What if any would you consider to be the main benefits to you of having internet access at home? What are they? DO NOT PROMPT SELECT ALL THAT APPLY. PROBE FULLY

Convenience of doing work/study at home	1
Ability to communicate with/ email friends	2
Ability to communicate with/ email friends and family who live far	3
Ability to communicate with/ email businesses and services	4
Ability to buy things online	5
Ability to do online banking	6
Ability to shop online without going out	7
It gives me independence	8
Ability to keep up with current news and events happening round the world	9
Ability to look up information generally	10
Ability to use social networking	
Access to entertainment	12
Playing games online, downloading music, etc)	13
Access to cheaper goods and services online	14
Other (PLEASE WRITE IN)	15
No – Nothing	16
Don't know	17

DO NOT USE INTERNET AT HOME SECTION

The following section is to be asked of those who do not have internet at home

ASK IF NO INTERNET AT HOME (Q3 NOT CODE 1-4), OTHERS GO TO Q16

Q12A. How likely are you to get the internet at home in the near future? SHOW CARD H/ READ OUT

1. Very likely
2. Fairly likely
3. Neither likely or unlikely
4. Not very likely
5. Not at all likely
6. DON'T KNOW

ASK IF NO INTERNET AT HOME

Q12B. Why do you not currently have the internet at home? DO NOT PROMPT
SELECT ALL THAT APPLY
PROBE FULLY – **'What else'**
PLEASE RECORD 1st MENTION AND THEN OTHER MENTIONS

COST	Q12B
It is too expensive	1
I can't justify the cost of it/I need other things more	2
I can't afford the regular payment to the internet service provider	3
I don't want to sign a contract of 12/18/24 months	4
I can't afford a computer	5
ACCESS	
I am planning on moving house	6
I don't have a landline	7
I am satisfied with using the internet elsewhere	8
I am not sure if it is available in my area	9
I don't want my children to access the internet	10
INTEREST & USAGE	
I am not interested in the internet	11
KNOWLEDGE/CONCERNS	
I don't really know what it does	12
I don't know where to get it from	13
I don't know how to use the internet	14
I don't know how to use a computer	15
I am unable to use it because of my disability	16
I'm not sure what I would do if it breaks	17
I am worried about security / ID theft / fraud/privacy issues	18
There is too much inappropriate content on the internet	19
Other (please write in)	20
Don't know	21

ASK IF NO INTERNET AT HOME (Q3 NOT CODE 1-4)

Q14. Is there anything that you would like to do currently, but can't do because you don't have access to the internet? If yes, what are these? DO NOT PROMPT SELECT ALL THAT APPLY

		Q14
A	Use for work, job or business	1
B	Use for school, college, university homework etc	2
Communicating		
C	Communicating with friends	3
D	Communicating with businesses and services e.g. the local council	4
E	Making free telephone calls e.g. Using a service such as Skype	5
Finding information		
F	Finding out news and weather information	6
G	Finding out information on public services provided by national or local government or businesses	7
H	Finding information related to hobbies and interests	8
I	Finding out information on travel/holidays/what's on in local area	9
J	General searching information	10
Shopping/ making transactions		
K	Banking/ Paying bills	11
L	Grocery shopping	12
M	Shopping for goods (not grocery) (anything else)	13
N	Selling goods	14
O	Accessing government services online e.g. council tax, renewing car tax, benefits etc	15
Entertainment		
P	Watching TV programmes or films	16
Q	Watching video clips (e.g. You Tube, etc)	17
R	Listening to the radio/music/	18
S	Buying music/ movies	19
T	Playing computer games	20
U	Other (specify)	21
V	Don't know	22
W	None of these	23

ASK IF NO INTERNET AT HOME (Q3 NOT CODE 1-4)
Q15. Overall, do you think you are missing any benefits because you do not have internet access at home? What are they? DO NOT PROMPT SELECT ALL THAT APPLY

Ability to work/study at home	1
Ability to communicate with/ email friends and family who live near you	2
Ability to communicate with/ email friends and family who live far away/overseas	3
Ability to communicate with/ email businesses and services	4
Ability to buy things online	5
Ability to do online banking	6
Ability to sell things online	7
Children are missing out on educational resource	9
Miss out on latest news (international, national or local)	10
Miss out on live/up to date sports news/results	11
Miss out on looking up information generally	12
Can't join social network sites	13
Miss out on entertainment (e.g. watching TV, playing games online, downloading music, etc)	14
I don't have access to cheaper goods and services online	15
Other (PLEASE WRITE IN)	16
No – Nothing	17
Don't know	18

D. Omnibus Random Location Sampling Method

The TNS Omnibuses employ a random location methodology each week. A varying number of sampling points are issued depending upon the length of the questionnaire. The number of Great Britain sampling points issued can be 143, 126 or 112 and corresponding sampling points in Northern Ireland are 4, 4 or 3. The points used are sub samples of those determined in a sampling system developed by TNS for its internal use.

Sampling Frame

2001 Census small area statistics and the Postcode Address File (PAF)[3] were used to define sample points. These are areas of similar population sizes formed by the combination of wards with the constraint that each point must be contained within a single Government Office Region [GOR]. In addition, geographic systems were employed to minimise the drive time required to cover each area as optimally as possible.

600 points were defined south of the Caledonian Canal in Great Britain [GB]. Another 25 were defined in a similar fashion in Northern Ireland. Finally 5 points were defined north of the Caledonian Canal. These latter differ in size from the other points and each other to meet the need to separately cover the different parts of the Highlands and Islands.

Stratification and Sample Point Selection

285 points were selected south of the Caledonian Canal for use by the Omnibuses after stratification by Government Office Region and Social Grade. They were also checked to ensure they are representative by an urban and rural classification. Those points are divided into two replicates. One set are used in one week. The other set are used in the next week. One of the points north of the Caledonian Canal is also used. 16 of the points in Northern Ireland are selected and divided into four replicates. Those

[3] Further information on PAF can be found at http://www.royalmail.com/marketing-services/address-management-unit/address-data-products/postcode-address-file-paf?campaignid=paf_redirect

replicates are used in rotation to give a wide spread across the Province over time. Similarly the statistical accuracy of the GB sampling is maximised by issuing sequential waves of fieldwork systematically across the sampling frame to provide maximum geographical dispersion. This ensures that the sample point selection remains representative for any specific fieldwork wave.

Selection of Clusters within Sampling Points

All the sample points in the sampling frame have been divided into two geographically distinct segments each containing, as far as possible, equal populations. The segments comprise aggregations of complete wards. For the Omnibuses alternate A and B halves are worked each wave of fieldwork. Each week different wards are selected in each required half and Census Output Areas[4] (OAs) selected within those wards. Then, groups of OAs containing a minimum of 125 addresses are sampled in those areas from the PAF.

Interviewing

The addresses, selected as above, are issued to achieve an adult sample of 15, 17 or 19 interviews in provincial areas and 13, 15 or 17 in London depending upon the questionnaire length. Assignments are conducted over two days of fieldwork and are carried out weekday 2pm-8pm and at the weekend. Quotas are set by gender/housewife. Within female housewife presence of children and working status is set, within men working status is set to ensure a balanced sample of adults within effective contacted addresses. All interviewers must leave 3 doors between each successful interview.

[4] Information on Census Output Areas can be found here http://www.ons.gov.uk/ons/guide-method/census/census-2001/data-and-products/output-geography/output-areas/index.html