Media Literacy Audit:
Report on media literacy of disabled people

3 April 2006
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Foreword

This report presents the results of detailed research undertaken by Ofcom to assess the extent of media literacy amongst disabled people within the UK. Section 3(4)(i) of the Communications Act requires Ofcom, in performing its general duties ‘to have regard to the needs... of persons with disabilities’ as it deems relevant in the circumstances.

Under Section 11 of the Communications Act 2003, Ofcom is required to bring about, or to encourage others to bring about, a better public understanding of the nature and characteristics of the material published by means of the electronic media and the processes and systems by which this is delivered.

Electronic communications networks play a central role in daily life. They underpin all businesses and are central to the workings of a modern democracy. Ofcom defines media literacy as the ability to access, understand and create communications in a variety of contexts. Without such skills, people’s ability to participate effectively in the workplace and in society may be greatly diminished.

The research programme as a whole examines the views and experiences of different groups within the UK. Other supplementary reports include those on minority ethnic groups, children, and older people – as well as people in different parts of the UK. Our main report on adult media literacy is available at www.ofcom.org.uk/advice/media_literacy.

We draw no specific conclusions in this report, however we hope it will serve as a useful source of current public opinion amongst different types of disabled people on a matter of increasing interest to many people.

David Currie
Chairman, Ofcom

Philip Graf
Deputy Chair, Ofcom
Chair, Ofcom Content Board
Executive Summary

The promotion of media literacy is a new responsibility placed on Ofcom arising from Section 11 of the Communications Act 2003.

In addition, Section 3(4)(i) of the Communications Act requires Ofcom, in performing its general duties “to have regard to the needs... of persons with disabilities” as it deems relevant in the circumstances. To this end, as part of the Media Literacy Audit, it was important to ensure that the views and media habits of disabled people were fully represented.

Ofcom’s definition of media literacy, developed after formal consultation with stakeholders, is ‘the ability to access, understand and create communications in a variety of contexts’. Media literacy gives people the confidence and knowledge to get the most out of the many media platforms that now exist.

Ofcom has carried out an audit of media literacy across the UK and in March 2006 published its first report, which details the audit’s findings across all UK adults. That report, Ofcom’s Media Literacy Audit: report on adult media literacy, is available at www.ofcom.org.uk/advice/media_literacy.

This supplementary report focuses on disabled adults aged under 65, defined as any type of self-reported impairment that ‘limits your daily activities or the work you can do’.

The reason for the focus on adults aged under 65 in this report is to disentangle the strong relationship that exists between age and disability. A separate supplementary report, published alongside this report, details the findings for older people aged 65 and over and includes analysis of older disabled people’s media literacy.

The purpose of this report on disabled people is to provide stakeholders with an array of information about the opinions and habits of those people in relation to media literacy. We recognise that disabled people are a diverse group and so we have examined, where possible, a range of sub-groups in this report: those with visual impairment, those with hearing impairment, those with mobility impairment, those aged under 45 and those aged 45-64.

But it is important to stress from the outset that this report uses a wide definition of disability, similar to that of the Disability Rights Commission and the Disability Discrimination Act¹. Our definition includes any kinds of impairment that are limiting to daily life and work. In this report we cannot categorise separately these disabilities by level of severity. Rather, our analysis is top-line, examining the extent to which the various elements of media literacy are differently achieved by those with impairment.

Its purpose is to act as a first stage, to provide Ofcom and its stakeholders with an overall view, supplemented by more detail where possible, in order to encourage debate and further examination.

The audit as a whole looks at how UK adults and children access, understand and create communications, with Ofcom’s particular focus being on electronic communications. In this context, our definition of access is much wider than availability or take-up of the platforms.

¹ The definition of disability used by the Disability Rights Commission is people who have ‘a disability or a long-term health condition that has an impact on their day to day lives’ (DRC website www.drc.org.uk). According to the DRC, one-fifth of people of working age can be defined as disabled. This figure reflects the incidence of disabled people in our overall sample.
Rather, it focuses upon interest, awareness, usage and competence relating to each platform. Understanding relates to how content (such as television and radio programmes, internet websites, or mobile video and text services) is created, funded and regulated.

Some of the elements of this audit - such as attitudes towards the provision of news, or knowledge of content regulation – apply to traditional analogue television and radio as well as their newer digital counterparts. But for the most part, this audit focuses on the four main digital media platforms – not only digital television and digital radio, but also the internet and mobile phones - as these are the ones where there is most divergence between different groups within the UK in terms of understanding, take-up and usage.

Our main findings are:

**Across all platforms**

- Some 82% of disabled people aged under 65 in our survey have a mobile phone, 65% have digital TV, 50% have home access to the internet and 46% say they have access to digital radio services. These levels of ownership are similar to all UK adults under 65, with the exception of mobile phones (90% all adults under 65) and the internet (62%). Digital television is more likely to be owned by those with mobility impairments, and least likely to be owned by those with visual impairments. Those with visual impairments are slightly more likely to have internet access at home and have a mobile phone.

- In comparison to all UK adults under 65, disabled people aged under 65 watch more TV, listen to more radio, and use the internet and mobile phones to a similar extent.

- Concerns about TV content are higher amongst disabled people aged under 65 than amongst all UK adults under 65, with concerns about radio content, the internet and mobile phones at around the same level. Concerns appear to be slightly greater for those with mobility impairments than those with sensory impairments.

**Television**

- Disabled people aged under 65 watch on average 25.5 hours of television per week, compared to 20.1 hours of TV viewing per week on average for all UK adults under 65. This rises to 28.6 hours for those with mobility impairments.

- Around three quarters of disabled people aged under 65 say they can use Teletext/Ceefax, and three in five say they can set up a recording on the VCR or use the digital TV interactive button. These figures are lower than for all UK adults under 65.

- Knowledge of TV regulation, channel funding and the watershed are at very similar levels for disabled people aged under 65 and all UK adults under 65, at around 80%. People with hearing impairments appear to be more knowledgeable about most of these elements.

- Three in five (59%) disabled people aged under 65 say they have any concerns ‘about what is on TV’; considerably higher than amongst all adults (43%). Concern appears to increase with age, and those with mobility impairments appear to be more concerned than those with sensory impairments.

- Similar numbers (two in five) of disabled people and all UK adults under 65 say they have interacted with TV using either their mobile, the interactive button on their remote control, or the internet.
Radio

- Disabled people (46%) are about as likely as all UK adults under 65 (48%) to say they have access to digital radio services.

- Disabled people aged under 65 say they listen to radio (both digital and analogue) for a total of 17.7 hours per week, compared to 15.2 hours for all UK adults as a whole. People with visual impairments are more likely to listen most per week, compared to those with hearing or mobility impairments. They are also more likely to be interested in the features of digital radio.

- A majority of disabled adults aged under 65 are aware that radio is regulated and are aware of how BBC radio stations are mainly funded, with fewer than half aware of how commercial radio stations are mainly funded. These levels are broadly similar to those for all UK adults under 65. People with hearing impairments appear more likely to be aware.

- One in seven (14%) disabled adults aged under 65 says they have any concerns ‘about what is on radio’. This measure is higher than that for all UK adults under 65 (10%).

Internet

- Amongst disabled internet users aged under 65, self-reported weekly usage levels are similar to those for all UK adults under 65 (10.7 compared to 10.4 hours). Disabled people aged under 45 use the internet more frequently, for 13.8 hours per week.

- Disabled adults aged under 65 make a more narrow use of the internet, with fewer users using the internet for communication, leisure and transactions than all UK adults users under 65.

- Over three quarters of disabled internet users under 65 say they can use email with confidence to contact friends and family, and nearly three quarters say they can visit websites to find out the latest news. Levels of competence for other internet tasks are lower, and overall, are lower than for all UK adults users under 65.

- Just under half of disabled people aged under 65 (48%) know how the BBC website is mainly funded; matching the finding for all UK adults under 65 (49%). Around one quarter (23%) know the main way of funding for search engine websites, slightly lower than for all UK adults (28%).

- Just under half (48%) of all disabled people under 65 with the internet at home say they are interested in, and confident about, blocking viruses/spam, which is lower than for all UK adults with the internet at home (58%).

- Three-fifths of disabled adults aged under 65 say they have any concerns about the internet (61%); a similar figure to all UK adults under 65. Disabled adults (and all UK adults) are mostly concerned by content.

Mobile phones

- Mobile phone ownership among disabled people is somewhat lower (82%) than for all UK adults under 65 (90%), with people with hearing impairments less likely to own than people with either visual or mobility impairments.
- Disabled people aged under 65 make and send similar levels of weekly calls and texts compared to all UK adults under 65.

- The top three weekly uses made by disabled people aged under 65 match those for all UK adult users, with calls coming first (81%), texts second (70%), and looking back at stored text messages third (26%).

- Over three-quarters of disabled people aged under 65 say they can do with confidence a variety of tasks relating to mobile phones, for example storing a new contact (88%); changing the ring-tone (79%); and listening back to voicemail messages (78%).

- Some 44% of disabled people aged under 65 say they have any concerns about mobile phones. Concern is mostly linked to risks to health.

Sources of news

- Disabled people aged under 65 use broadly similar sources of news as all UK adults, with just under two-thirds using TV the most (64%); 17% nominating newspapers, and 13% the radio. There are no significant differences by sub-group.

- Disabled people aged under 65 are more likely to use just one source for news, at 28% compared to 22% of all adults under 65.

- Overall, levels of trust and distrust in TV and radio amongst all adults and disabled people aged under 65 are very similar, at around three-quarters of the maximum potential. Levels of trust for news websites and newspapers are lower than for TV and radio, and slightly lower amongst disabled people, especially those aged 45-64.

Attitudes and preferences

- Some 44% of disabled people aged under 65 say they would miss watching television the most, similar to all UK adults under 65 (42%). Listening to music is next for disabled people, with 17% saying they would miss it most (compared to 14% for all UK adults). Those with visual impairments are more likely to miss listening to radio and to music than those with mobility or hearing impairments.

- One third of disabled people aged under 65 (34%) say they are interested in learning more about digital technologies (compared to a similar figure for all UK adults under 65 of 37%). One in five (18%) is interested in learning about using the internet and one in ten (11%) about creating a website. Interest beyond these media topics is low.

- One quarter of disabled adults aged under 65 (25%) have experience of learning about any of these media topics (again dominated by using the internet (18%) and creating a website (8%)), similar to UK adults overall (at 26% with any experience).

- Experience of learning is higher for disabled people aged under 45, at 33% compared to 19% of those aged 45-64. Those with mobility impairments are the least likely to have experience of learning about these media topics (9%), and are also less likely to be interested in learning (22%).
Section 1

Introduction

1.1 Focus of report

The promotion of media literacy is a new responsibility placed on Ofcom arising from Section 11 of the Communications Act 2003.

In addition, Section 3(4)(i) of the Communications Act requires Ofcom, in performing its general duties “to have regard to the needs... of persons with disabilities” as it judges relevant in the circumstances. To this end, as part of the Media Literacy Audit, it was important to ensure that the views and media habits of disabled people were fully represented.

Ofcom has carried out an audit of media literacy across the UK and in March 2006 published its first report, which details the audit’s findings across all UK adults. That report, Ofcom’s Media Literacy Audit: report on adult media literacy, is available at www.ofcom.org.uk/advice/media_literacy.

This supplementary report focuses on disabled adults aged under 65, defined by the respondents themselves through indicating any type of impairment they had that ‘limits your daily activities or the work you can do’.

The reason for the focus on adults aged under 65 in this report is to disentangle the strong relationship that exists between age and disability. A separate supplementary report, published alongside this report, details the findings for older people aged 65 and over and includes analysis of older disabled people’s media literacy.

The purpose of this report on disabled people is to provide stakeholders with an array of information about the opinions and habits of those people in relation to media literacy. We recognise that disabled people are a diverse group and so we have examined, where possible, a range of sub-groups in this report:

- those with visual impairments;
- those with hearing impairments;
- those with mobility impairments;
- those aged under 45; and
- those aged 45-64.

But it is important to stress from the outset that this report uses a wide definition of disability, similar to that of the Disability Rights Commission and the Disability Discrimination Act. Our definition includes any kinds of impairment that are limiting to daily life and work. In this report we cannot categorise separately these disabilities by level of severity. Rather, our analysis is top-line, examining the extent to which the various elements of media literacy are differently achieved by those with impairment.

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2 The definition of disability used by the Disability Rights Commission is people who have ‘a disability or a long-term health condition that has an impact on their day to day lives’ (DRC website www.drc.org.uk). According to the DRC, one-fifth of people of working age can be defined as disabled. This figure reflects the incidence of disabled people in our overall sample.
Its purpose is to act as a first stage, to provide Ofcom and its stakeholders with an overall view, supplemented by more detail where possible, in order to encourage debate and further examination.

1.2 The definition of media literacy

Ofcom’s definition of media literacy, developed after formal consultation with stakeholders, is ‘the ability to access, understand and create communications in a variety of contexts’.

In order to gain an initial picture of the extent of media literacy across the UK, Ofcom commissioned an ‘audit’ of how UK adults and children access, understand and create communications, with a particular focus on electronic communications. In this context, access has a much wider definition than take-up or accessibility issues: it includes understanding of what each platform and device is capable of and how to use its functions; while understanding relates to how content (such as television and radio programmes, internet websites, or mobile video and text services) is created, funded and regulated.

The purpose of the audit as a whole is to begin to track the media literacy of the UK population (both adults and children). To do this, we needed to translate our definition into quantifiable elements and so have used the following as proxies for some of the key areas of media literacy. It is important to note that our definition of ‘access’ is much wider than simple availability or take-up of the platforms. Rather, it focuses upon interest, awareness, usage and competence.

‘ACCESS’

- Interest in and awareness of the digital features of the various media platforms
- Usage, volume of usage, breadth of usage of the platforms
- Competence in using the features available on each platform
- The extent and level of concerns with each platform
- Knowledge of and competence in using content controls, such as ability to block unwanted email messages

‘UNDERSTANDING’

- Knowledge of regulation
- Knowledge of how elements of each media platform are funded
- Trust in news outlets on each medium
- Trust in internet sites

‘CREATING’

- The ability of individual users to create their own content
- The ability of users to interact with the medium or with other users

3 While interaction is not strictly an element of creativity (it could also for example be positioned under ‘access’), it has a connection to it. Interactivity is arguably a first step along the road to creativity, as people learn to (want to) manipulate the technology and develop their skills by interacting with the content. We report on interaction within each of the platform sections, while in our summary we keep to a more focused definition of ‘create’ meaning the active generation of content.
This list indicates the core elements investigated in the study. However, we also asked a range of other questions about media habits and preferred media forms, which add a further context or background to the research.

More discussion of the ambit of the audit, plus detailed findings for UK adults as a whole as well as key findings for various sub-groups within the UK population, can be found in *Ofcom’s Media Literacy Audit: report on adult media literacy*, available at [www.ofcom.org.uk/advice/media_literacy](http://www.ofcom.org.uk/advice/media_literacy).

### 1.3 Research methodology

Across the whole study, over 3,200 adults (aged 16+) were interviewed, of whom 496 were disabled people aged under 65. The study was conducted for Ofcom by the research agency saville rossiter-base, and fieldwork took place from 8 June to 5 August 2005.

We recognise that disabled people are a diverse group and so we have examined, where possible, a range of sub-groups in this report:

- those with visual impairments;
- those with hearing impairments;
- those with mobility impairments;
- those aged under 45; and
- those aged 45-64.

There is some overlap between these groups: for example, one quarter of those with hearing impairments also have visual impairments, and one in seven of those with visual impairments also have hearing impairments. It should also be noted that those with visual impairments have the youngest profile (with 38% aged under 45), those with hearing impairments have the oldest profile (26% aged under 45), with the age profile for those with mobility impairments mid-way between (32% aged under 45).

In addition, it should be noted that the average age of disabled adults aged under 65 (45 years) is higher than the average age of all UK adults aged under 65 (39 years). Adults aged under 65 with any disability are significantly less likely to be aged under 25 than all adults aged under 65 (at 10% compared to 18%), and the same is true for the age band 25-34 (13% compared to 21%). This different age profile is noteworthy because levels of media literacy amongst the youngest adults differ considerably from other adults.

Together, the core fieldwork and the specialist research brought the total number of disabled interviewees to 496, comprising 143 with visual impairments, 97 with hearing impairments and 104 with physical impairments. (In our supplementary report on older people a further 279 people with a disability aged 65 and over were interviewed.)

Full details of the research methodology can be found at Annexes 1 and 2, and also in our main report *Media Literacy Audit: report on adult media literacy*. Copies of the survey are available from our website at [www.ofcom.org.uk/advice/media_literacy](http://www.ofcom.org.uk/advice/media_literacy).

### 1.4 Structure of report

Section 2 provides an overview of the core elements of media literacy across each of the four main platforms – television, radio, the internet, and mobile phones. It places these elements within a wider, scene-setting context of take-up of the platforms across the UK.
Sections 3 – 6 examine each platform in turn, providing further insights into the extent of media literacy for each.

Section 7 focuses on the topic of trust in news sources, as news is a key illustration of how people evaluate content (such as programmes or internet sites) across platforms.

Finally, section 8 provides details about people’s overall attitudes towards and preferences for key media platforms, and also indicates learning and educational preferences.

### 1.5 Further publications

This core report provides the media literacy audit findings for disabled people aged under 65. A series of further reports are published separately focusing on:

a) All UK adults  
b) Children (and their parents)  
c) Nations and English regions  
d) Older people aged 65 and over  
e) Minority ethnic groups
Section 2

Overview of media literacy

This section sets out the results for the key parameters of media literacy, using some aggregate measures which are further broken down in the following sections on each of the platforms.

It begins by placing these within a background, scene-setting context of overall take-up figures for the platforms under discussion as well as a range of other media devices.

The majority of this section examines how the responses of disabled people aged under 65 differ to the UK as a whole. Differences between the sub-groups of disabled people aged under 65 are compared in the final part of the chapter.

Summary

Some 82% of disabled people aged under 65 in our survey have a mobile phone, 65% have digital TV, 50% have home access to the internet and 46% say they have access to digital radio services. These levels of ownership are similar to all UK adults under 65, with the exception of mobile phones (90% all adults under 65) and the internet (62%).

Compared to the average for all UK adults under 65, disabled people aged under 65 on average watch more TV and listen to more radio, and use the internet and mobile phones to the same extent.

Concerns about TV content are higher amongst disabled people aged under 65 than amongst the equivalent age group across UK adults as a whole, with concerns about radio content, the internet and mobile phones at around the same level. Concerns appear to be slightly greater for those with mobility impairments than those with sensory impairments.

Nearly three-quarters of tasks related to television (both analogue and digital) were felt to be able to be done with confidence by disabled owners aged under 65, with slightly lower levels for internet, and higher levels for mobile phone tasks.

Four-fifths of disabled adults aged under 65 are aware of the 9 pm watershed. Just over half of disabled home internet users aged under 65 say they can control content. By contrast, relatively few disabled mobile phone owners aged under 65—15%—demonstrate knowledge of the content controls available on the most recent mobile phones. These measures are all close to those for UK adults under 65.

Knowledge of how TV is funded, and whether or not it is regulated, is fairly high, at an index level of 78%. This is very similar to the measure for all UK adults under 65 (80%). Levels of knowledge about industry funding and regulation for radio are not as high. The overall index measure is 55%, very similar to the measure of 58% for all UK adults under 65. Knowledge of internet funding sources is relatively low, with an index measure of 35%.
2.1 Context: take-up of platforms and devices

This audit is not intended to report on the availability or take-up of different platforms and services. However, in order to set its findings in context, the audit begins by recording existing levels of take-up, as reported by those who took part in the survey. Figure 1 shows the extent of (self-reported) home take-up for the four key platforms. Please note that these questions were asked of our Media Literacy Audit respondents, who were interviewed between June and August 20054.

Figure 1 Ownership of key platforms across all UK adults and disabled people aged under 65 from Audit survey5

<table>
<thead>
<tr>
<th>Platform</th>
<th>All UK adults aged under 65</th>
<th>All disabled adults aged under 65</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile phone</td>
<td>90%</td>
<td>82%</td>
</tr>
<tr>
<td>Digital TV</td>
<td>66%</td>
<td>65%</td>
</tr>
<tr>
<td>Internet</td>
<td>62%</td>
<td>50%</td>
</tr>
<tr>
<td>Digital radio</td>
<td>48%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Broadband take-up stands at 62% of disabled people aged under 65 with internet access at home, and 31% of all with a disability aged under 65. The comparable figures for all UK adults under 65 are 65% of those with internet access at home, and 40% of all.

2.2 Ownership of media devices at home

As well as these core platforms, we wanted to build a picture of the levels of uptake of the range of other media devices currently available, in order to provide a useful context for our investigation of media literacy. All adults were prompted with a list of media devices and were asked to say which they have in their household. Figure 2 shows the responses from all adults and from disabled people aged under 656.

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4 The figures are slightly different than the figures that Ofcom publishes in its Communications Market Review, due to question wording and timing of fieldwork. That said, there are no differences of statistical significance between these figures and those from Ofcom’s other penetration data from this period.

5 Base: All UK adults and disabled people aged under 65 (2542; 496). Questions T2, R1, I3, M2, prompted responses, single coded.

6 The PVR figure is higher than industry estimates. This is often the case when asking respondents about PVRs, as there is likely to be some confusion with premium subscription Sky packages.
As illustrated in Figure 2, while in broad terms there are few differences between the average for all UK adults under 65 and disabled people, there are indications that disabled people appear to own fewer digital devices such as games consoles, digital cameras and MP3 players. For example, 58% of all adults have a games console in the household compared to 44% of adults under 65 with a disability. It also appears that people with mobility impairments are more likely to own VCRs and DVD players than those with hearing or sight impairment.

We now turn to how these platforms and devices are used and thought about – in other words the core elements of media literacy.

2.3 Overview of media literacy by platform

Interest and awareness

Our audit asked respondents whether they were interested in a variety of features of each of the media platforms, and also if they were aware of such features.

Figure 3 summarises the results of these questions for disabled adults aged under 65. The strength of each element is shown both as the shaded proportion of the ring and as a percentage.

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7 Base: All UK adults and disabled people aged under 65 (2542; 496). Questions A8A-J, prompted responses, multi-coded.
**Figure 3  Interest and awareness**

<table>
<thead>
<tr>
<th></th>
<th>Digital TV</th>
<th>Digital Radio</th>
<th>Internet</th>
<th>Mobile phone</th>
</tr>
</thead>
</table>
| **Interest in features**  
Amongst all adults  
% of maximum potential | 57%        | 44%           | 48%      | 46%          |
| UK adults under 65   | 63%        | 51%           | 54%      | 54%          |
| **Awareness**  
Amongst those interested  
% of maximum potential | 89%        | 78%           | 89%      | 91%          |
| UK adults under 65   | 90%        | 80%           | 92%      | 94%          |

'**Interest in (digital) features**'  

Of all the platforms, respondents with a disability aged under 65 were most interested in the features of digital TV (in addition to those features already available on analogue TV), with nearly three-fifths of the features of interest to them. Interest in the digital features of the other three platforms is considerably lower; at around half of the maximum potential for digital radio, the internet and for mobile phone features.

For each of the platforms, the features of more interest are those which have been established for longer and which are integral to the use of the platform. For example, ‘a crystal clear picture’ is of interest to more disabled people aged under 65 (76%) than ‘channels where you can buy things directly through your TV’ (41%).

In other words, people appear to be most interested in that which is already familiar to them.

When compared to the equivalent age group within the UK as a whole, disabled people are somewhat less likely to show interest in the features, partly because appetite for digital features is greater among younger people, and as set out earlier, the disabled sample average age is somewhat older. The greatest difference in levels of interest in digital features relates to mobile phones, with this measure at 46% of the maximum potential for adults under 65 with a disability and 54% of the maximum potential for all adults aged under 65.

'**Awareness of (digital) features of interest**'  

Figure 3 shows that amongst disabled people aged under 65 who are interested in the digital features of each platform, awareness of those features is generally very high. Awareness is rather lower for digital radio features, however. Awareness and interest are closely linked.

Awareness of the digital features of interest are at broadly similar levels for disabled people aged under 65 and for all UK adults under 65.

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6 All adults were prompted with a list of features for each of the digital platforms and were asked to state whether each was of interest to them or not (questions T14, R14, I23, M17). The index measure is the proportion of features of interest to adults.

7 Features included ‘a crystal clear picture’, ‘more than five channels to choose programmes from’, ‘channels where you can buy things directly through your TV’, and ‘possible to select different viewing angles or different matches for sports events such as Wimbledon and the Olympics’.

8 The maximum potential being interest in all digital features for a platform.

9 Those interested in a feature for a given platform were asked to state whether they were already aware of this platform feature (questions T14, R14, I23, M17). The index measure is the proportion of features of interest that were already known to adults.
Usage, concern and competence

The next set of media literacy elements relate to usage, concern and competence (see Figure 4). The elements relating to volume of use and level of concern include both analogue as well as digital TV and radio platforms.

Figure 4 Usage, concern and competence

<table>
<thead>
<tr>
<th></th>
<th>TV</th>
<th>Radio</th>
<th>Internet</th>
<th>Mobile phone</th>
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<tbody>
<tr>
<td><strong>Volume of usage</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>per week</strong></td>
<td>25.5 hrs</td>
<td>17.7 hrs</td>
<td>10.7 hrs</td>
<td>19 calls 26 texts</td>
</tr>
<tr>
<td><strong>Amongst owners</strong></td>
<td>Live &amp; time-shifted broadcast TV</td>
<td>Home, car out &amp; about, at work/ place of education</td>
<td>Home, at work/ place of education, anywhere else</td>
<td></td>
</tr>
<tr>
<td><strong>UK adults &lt; 65</strong></td>
<td>20.1 hrs</td>
<td>15.3 hrs</td>
<td>10.1 hrs</td>
<td>22 calls/ 31 texts</td>
</tr>
<tr>
<td><strong>Level of concern</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>% of maximum potential amongst all adults</strong></td>
<td>35%</td>
<td>6%</td>
<td>42%</td>
<td>26%</td>
</tr>
<tr>
<td><strong>UK adults &lt; 65</strong></td>
<td>25%</td>
<td>6%</td>
<td>40%</td>
<td>24%</td>
</tr>
<tr>
<td><strong>Breadth of usage</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>% of maximum potential amongst owners</strong></td>
<td>n/a</td>
<td>n/a</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td><strong>UK adults &lt; 65</strong></td>
<td></td>
<td></td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td><strong>Competence with digital features</strong></td>
<td></td>
<td>n/a for non-DAB owners</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>% of maximum potential amongst owners</strong></td>
<td>72%</td>
<td>68%</td>
<td>86%</td>
<td></td>
</tr>
<tr>
<td><strong>UK adults &lt; 65</strong></td>
<td>77%</td>
<td>76%</td>
<td>91%</td>
<td></td>
</tr>
<tr>
<td><strong>Knowledge of content controls</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Amongst owners</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>% of maximum potential</strong></td>
<td>81%</td>
<td>n/a</td>
<td>55%</td>
<td>15%</td>
</tr>
<tr>
<td><strong>UK adults &lt; 65</strong></td>
<td>81%</td>
<td>59%</td>
<td>15%</td>
<td></td>
</tr>
</tbody>
</table>

‘Volume of usage’

TV sees the highest volume of self-reported usage of the four platforms, at an average of 25.5 hours per week, followed by radio and then internet (with usage outside the home taken into consideration for both of these platforms). The volume of mobile phone use is assessed in terms of calls made and texts sent by owners per week.

In comparison to all UK adults under 65, disabled people aged under 65 have a higher volume of TV viewing and radio listening, and similar amounts of internet use. Volume of mobile phone use is slightly under the average for all adults aged under 65.
‘Level of concern’ 12

Levels of concern are:

- negligible for radio;
- around one-quarter of the maximum potential for mobile phone;
- around one-third for TV; and
- highest for the internet at two-fifths of the maximum potential.

Whilst concern about TV and the internet mostly relates to content, this is much less likely for mobile phones, where concern tends to relate to health issues (resulting from usage of the phones themselves or from mobile phone masts) or risks to society’s standards and values.

Concerns about TV content are higher amongst disabled people aged under 65 than amongst the equivalent age group across UK adults as a whole, with concerns about radio, the internet and mobile phones at around the same level. Concerns appear to be slightly greater for those with mobility impairments than those with sensory impairments.

‘Breadth of usage’ 13

Amongst owners with a disability aged under 65, breadth of usage for the internet and for mobile phones is around one-seventh of the maximum potential14. Breadth of usage is marginally lower than for all UK adults under 65.

‘Competence (with digital tasks)’ 15

Figure 4 shows that the highest levels of self-rated competence amongst owners with a disability aged under 65 are for tasks relating to mobile phones (86% index measure), although competence for tasks related to digital TV and the internet are also high, at 72% and 68% respectively.

When compared to all adults aged under 65, disabled people have lower levels of competence. The greatest difference in levels of competence relates to the internet, where the measure for adults under 65 with a disability is at 68% of the maximum potential, compared to 76% for all adults aged under 65.

---

12 This measure adds responses to a number of questions regarding nominating any concerns about the platform (questions T21, R19, I32, M20), and being ‘very concerned’ or ‘quite concerned’ about the platform (questions T22, R20, I33, M21). The index measure is a percentage of the maximum possible. The maximum possible being either ‘very concerned’ or ‘quite concerned’ about the platform, or nominating any concerns about the platform.

13 Measures for breadth of usage are available for internet and mobile phone owners, who were prompted with an extensive list of possible uses and were asked to state the frequency with which they used the internet or their mobile phone for each.

14 The maximum potential being weekly use of all possible uses.

15 All in households with TV, multi-channel TV, internet and who owned mobile phones were prompted with a series of tasks and were asked to say for each whether the task was of interest to them and, if so, whether it was something they could do with confidence (questions T15, T17, R15, I24, M18). The index measure is based on a count of all tasks of interest which owners said they can do with confidence. It should be noted that these measures of competence are based on tasks which are of stated interest to users of each platform. No competence measures are shown for digital radio as these were mostly specific to DAB radio sets, whereas the majority listening to digital radio at present are doing so through their digital TV service or the internet. It should also be taken into consideration that the tasks used to assess mobile phone competence (for example ‘send a text message’ and ‘store a new contact on your mobile phone’) are considerably more straightforward (and everyday) than the tasks used to assess digital TV or internet competence.
‘Knowledge of content controls’

As shown in Figure 4, four-fifths of disabled adults aged under 65 are aware of the 9 pm watershed (before which certain types of programme content, unsuitable for children, may not be shown). Awareness amongst all UK adults under 65 is at an identical level (81%).

For the internet, the measure is related to the extent that home internet users say they carry out various checks or say they are confident about blocking computer viruses or email spam. According to this index measure, just over half of home internet users with a disability aged under 65 can control content; very similar to the measure for all owners (57%).

By contrast, relatively few mobile phone owners with a disability aged under 65 – 15% – demonstrate knowledge of the content controls available on the most recent mobile phones. This measure is at almost the same level all mobile phone owners, with only 17% aware of the availability of these relatively new controls.

Understanding and creation

Figure 5 shows the elements of media literacy relating to understanding and creation, not all of which are applicable to each of the platforms. The elements relating to industry funding and regulation, and trust in news outlets, report on TV and radio generically rather than just their digital platforms.

<table>
<thead>
<tr>
<th>Aspect</th>
<th>TV</th>
<th>Radio</th>
<th>Internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry funding/ regulation</td>
<td>78%</td>
<td>55%</td>
<td>35%</td>
</tr>
<tr>
<td>% of maximum potential</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>amongst all adults</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK adults &lt; 65</td>
<td>80%</td>
<td>58%</td>
<td>38%</td>
</tr>
<tr>
<td>Trust in news outlets</td>
<td>75%</td>
<td>72%</td>
<td>58%</td>
</tr>
<tr>
<td>% of maximum potential</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>amongst all adults</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK adults &lt; 65</td>
<td>77%</td>
<td>74%</td>
<td>63%</td>
</tr>
<tr>
<td>Creating content</td>
<td>n/a</td>
<td>n/a</td>
<td>10%</td>
</tr>
<tr>
<td>% of maximum potential</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>amongst owners</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK adults &lt; 65</td>
<td></td>
<td></td>
<td>15%</td>
</tr>
</tbody>
</table>

16 Measures relating to content controls vary across the platforms. The TV measure shows awareness of the 9 pm watershed (question T25). The internet measure relates to an index across those with internet access who are interested and able to block computer viruses/ e-mail spam (question I24) and who use ‘professional signs’ (such as system message, padlock symbol, links to trusted sites) to judge website security (question I38). The mobile phone measure relates to an index across those with a mobile phone aware of age verification, security and filtering systems (question M12).

17 There are no applicable measures of understanding and creation in relation to mobile phones to report on in this section.
‘Knowledge of industry funding/regulation’

Knowledge of how TV is funded, and whether or not it is regulated, is fairly high, at an index level of 78%. This is very similar to the measure for all UK adults under 65 (80%).

Levels of knowledge about industry funding and regulation for radio are not as high. The overall index measure is 55%, very similar to the measure of 58% for all UK adults under 65.

Knowledge of internet funding sources is relatively low, with an index measure of 35%. Specifically, awareness of how internet search-engine websites are funded is relatively low, at 23% of disabled adults aged under 65, although awareness of how the BBC website is mainly funded is higher. 48% of disabled adults aged under 65 think that the BBC website is mainly funded by the licence fee. These measures are at similar levels to those for UK adults as a whole.

Similarly, amongst those with internet access, awareness of funding does not differ significantly between adults as whole and disabled adults aged under 65.

Levels of knowledge appear to rise with age.

‘Trust in news outlets’

Trust was assessed in respect of particular news outlets for each of TV, radio and the internet. Trust in types of newspapers has been shown in Figure 5 for comparison.

Trust in radio and TV news outlets is highest, at around three quarters of the maximum potential. The measure for internet news websites is rather lower, at around three-fifths of the maximum potential.

Trust for each of these three types is, however, higher than the measure for newspapers, which stands at around two-fifths of the maximum potential.

The measures for trust in TV news, radio news, news websites and newspapers for disabled people aged under 65 are at slightly lower levels than for UK adults of the same age, although differences are small.

‘Creating content’

As shown in Figure 5, the measures relating to content creation are internet- and PC-based. Current levels of content creation amongst disabled people aged under 65 with internet access are low, at 10% of the maximum potential. This measure is lower than that of the equivalent age group of all UK adults with internet access (15%).

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18 This measure adds responses to questions regarding awareness of commercial and non-commercial funding (questions T19, T20, R17, R16, I30, I31) and also regulation for TV and radio (T23 and R2). The index measure is a percentage of the maximum possible.
19 All adults were asked to use a five point scale to indicate the extent to which they would trust or distrust particular TV, radio, internet and press news outlets (question Z8). An index measure for each of the four types of media was calculated based on all giving a rating for each outlet from the list. For example, those giving a rating for two of the three news websites of which one was a ‘would trust’ rating and one was a ‘would not trust’ rating would have an index measure of 50% for extent of trust and 50% for extent of distrust.
20 The maximum potential being a ‘would trust’ rating for all news outlets rated.
21 Three measures have been used to create the index measure – those with internet access who say they have their own website, their own web-log, and who can edit and organise photos on a computer for viewing with confidence (questions I14, I24). The index measure is an average across these three.
2.4 Comparison between groups of disabled people aged under 65 to UK adults overall

We have so far shown the presence of the media literacy elements for disabled people aged under 65 in order to build an overall picture. In this section we compare the presence of media literacy elements for some sub-groups of disabled people aged under 65: those with visual, hearing or mobility impairments, those aged under 45, and those aged 45-64.

In order to be consistent with our overall Audit examination of UK adults as a whole, this section compares disabled people under 65 to the UK population as a whole, rather than to under-65s as elsewhere in this report. The extent of the variation from the overall UK adults measure is indicated as higher or lower than the UK average as follows:

- Very high: (Over 30% higher)
- High: (16%-30% higher)
- Slightly high: (5%-15% higher)
- Slightly low: (5%-15% lower)
- Low: (16%-30% lower)
- Very low: (Over 30% lower)

Where no arrow is shown in Figure 6, this indicates little variation from the UK average for all adults.

It is important to note that the media literacy elements described in Figure 6 combine all four platforms, and so there will be some cases where higher or lower results compared to the UK average for a particular platform are not apparent. Such differences are reported on in the platform-specific chapters later in this report.

**Figure 6** Media literacy elements for disabled people aged under 65 compared to all UK adults

<table>
<thead>
<tr>
<th></th>
<th>Interest in features</th>
<th>Aware of features of interest</th>
<th>Volume of usage</th>
<th>Breadth of usage</th>
<th>Competence</th>
<th>Concern</th>
<th>Funding/ regulation</th>
<th>Trust</th>
</tr>
</thead>
<tbody>
<tr>
<td>All disabled adults (aged under 65)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adults with visual impairments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adults with hearing impairments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adults with mobility impairments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aged under 45</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aged 45-64</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Figure 6 indicates that there are relatively few differences in levels of media literacy for disabled people aged under 65 as a whole and UK adults as a whole.

A comparison of all disabled people aged under 65 with the sub-groups under analysis does, however, throw up some differences at this overall level. The slightly higher volume of usage amongst all disabled adults aged under 65 is more evident for those with visual impairments and younger (aged under 45) disabled adults.

Similarly, the slightly lower breadth of usage measure is more evident amongst those with hearing or mobility impairments and older (45-64) disabled adults. Levels of concern are slightly higher than for all UK adults at the overall level, but are more evident for those with mobility impairments and older (45-64) disabled adults.

The following sections of this report provide more detail on each of these media literacy elements.
Section 3

Television

This section examines television in depth, taking the core elements of media literacy and comparing disabled people aged under 65 with the adult population as a whole. Where possible, it also includes indications of the particular sub-group responses. We asked questions about TV generally as well as focusing on the digital platform.

Summary

Nearly two thirds of disabled people aged under 65 have digital television at home (65%).

Disabled people aged under 65 watch on average 25.5 hours of television per week, compared to 20.1 hours of TV viewing per week on average for all UK adults under 65. This rises to 28.6 hours for those with any disability relating to mobility.

Around three quarters of disabled people aged under 65 say they can use Teletext/Ceefax, and three in five say they can set up a recording on the VCR or use the digital TV interactive button. These figures are lower than for UK adults under 65.

Knowledge of TV regulation, channel funding and the watershed are at very similar levels for disabled adults aged under 65 and all UK adults under 65, at around 80%. People with hearing impairments appear to be more knowledgeable about most of these elements.

Three in five (59%) disabled people aged under 65 nominate (without prompting) any concerns ‘about what is on TV’; considerably higher than amongst all adults (43%). Concern appears to increase with age, and those with mobility impairments appear to be more concerned than those with sensory impairments.

Similar numbers (two in five) of disabled people and all UK adults under 65 say they have interacted with TV using either their mobile, interactive button or the internet.

3.1 Take-up of digital TV

As set out earlier, two-thirds (65%) of disabled people aged under 65 say they have digital TV at home. Ownership levels for various groups of disabled people aged under 65 are also shown below.

<table>
<thead>
<tr>
<th></th>
<th>Digital TV</th>
</tr>
</thead>
<tbody>
<tr>
<td>All UK adults under 65</td>
<td>66%</td>
</tr>
<tr>
<td>All disabled people aged under 65</td>
<td>65%</td>
</tr>
<tr>
<td>- Visually impaired</td>
<td>63%</td>
</tr>
<tr>
<td>- Hearing impaired</td>
<td>68%</td>
</tr>
<tr>
<td>- Mobility impaired</td>
<td>71%</td>
</tr>
<tr>
<td>- Aged under 45</td>
<td>63%</td>
</tr>
<tr>
<td>- Aged 45-64</td>
<td>66%</td>
</tr>
</tbody>
</table>
3.2 Hours of TV viewing

Levels of self-reported TV viewing show variation between the various groups of disabled people. Figure 7 shows the three main types of weekly viewing for all adults with a TV at home, for disabled people aged under 65, and for groups of disabled people aged under 65.

Across all UK adults under 65 the average (self-reported) weekly live TV viewing stands at 17.9 hours, plus 2.2 hours time-shifted, and an average of 3.2 hours watching videos or DVDs (2.4 videos or DVDs watched, multiplied by an estimated 1.5 hours each).

This provides an estimate of 20.1 hours of TV viewing per week on average for all UK adults under 65, with this figure rising to 25.5 hours for all disabled people aged under 65, and 28.6 hours for those with any disability relating to mobility.

This discrepancy between groups is perhaps partly explained by the extent to which ‘all or most leisure time’ is spent at home. We asked respondents how much of their leisure time is spent at home in a typical week (by selecting from a prompted list of time-periods). 12% of all UK adults under 65 said ‘all/almost all’ of their leisure time is spent at home. This rises to 19% for disabled adults aged under 65, and is significantly higher (at 31%) for those with mobility impairments.

We also examined who were most likely to be heavy TV viewers. We defined heavy TV users as watching 35 or more hours of TV (live or time-shifted) per week. This group accounts for 15% of all UK adults under 65, 24% of all with a disability aged under 65, and 33% of those with mobility impairments.

3.3 Monthly spend

Amongst those with cable or satellite TV, the average self-reported monthly spend on the TV service received is £33 across all adults and £29 amongst disabled people aged under 65.

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22 Three questions were asked to assess the volume of TV viewing: hours per week watching TV as it is broadcast (shown in Figure 7 as ‘live TV’), hours per week watching recorded TV programmes previously shown live (‘recorded TV’), and the number of pre-recorded DVDs or videos watched per week (with this number multiplied by 1.5 to estimate the number of hours per week).

23 Base: All adults under 65 with a TV at home, disabled people aged under 65 with a TV (2507, 485). Questions T5A-C, prompted responses, single coded.

24 This figure is lower than the official BARB television viewing figure for 2004 (27.7 hours for adults aged 16+, although this discrepancy is to be expected given the difference in methodologies and the likelihood of self-reported estimates being lower.
Of all cable or satellite subscribers, 6% pay over £50 per month for their TV service, with this level of spending at a similar levels amongst with a disability aged under 65 (4%).

### 3.4 Competence with TV tasks

We wanted to understand more about the levels and types of skill people have in using the functions available on their television. All disabled adults aged under 65 with a TV at home (98% of all adults under 65 with a disability) were prompted with a series of ‘tasks’ associated with television, and were asked for each one to choose from a list of possible responses to indicate if each task was of interest to them, and, if so, whether it was a task they could do with confidence. Those with digital TV (65% of disabled people aged under 65) were also presented with a series of digital TV-specific tasks and taken through the same options. Figure 8 summarises the responses for each task.

![Figure 8 Competence with TV tasks](image)

Around three quarters of disabled people aged under 65 say they can use Teletext/Ceefax, and three in five say they can set up a recording on the VCR or use the digital TV interactive button.

Levels of competence across all disabled adults aged under 65 are at lower levels to all UK adults aged under 65.

At the sub-group level, several of these competence measures are significantly lower for those with visual impairments; using Teletext/Ceefax, setting up a recording on a VCR, changing DVD language settings and selecting different viewing angles.

Those with mobility impairments appear to be more likely to be able to change DVD language settings, and to use the interactive button – a finding consistent with the pattern of those with mobility impairments appearing to watch more TV and to be more interested in its features.

A minority of disabled people aged under 65 say they are not interested in or have no need for the various features relating to TV.

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3.5 Awareness of TV regulation, channel funding and watershed

Turning to the elements of media literacy that relate to understanding of the platform, TV stands out among the four main platforms as generating the highest levels of awareness of regulation and channel funding, and also of the content control afforded by the 9pm watershed.

Figure 9  Awareness of TV regulation, channel funding and watershed

As shown in Figure 9, awareness levels regarding TV regulation, channel funding and the watershed are at very similar levels for disabled adults aged under 65 and all UK adults under 65.

3.6 Concerns about what is on TV

Three in five (59%) disabled people aged under 65 nominate (without prompting) any concerns ‘about what is on TV’, considerably higher than amongst all adults under 65 (43%).

Nominations are dominated by content concerns, as indicated in Figure 10, which shows the proportion of all disabled adults aged under 65 nominating any concerns, along with the top areas of concern mentioned. Those with mobility impairments appear to be more likely to be concerned.

Figure 10  Concerns about what is on TV

Overall, one in eight (13%) disabled adults aged under 65 claims to be ‘very concerned’ about television, compared to 7% of UK adults under 65. Almost all of these had nominated a concern relating to offensive content, and we see in Figure 11 that nominations relating to offensive content are higher amongst this group of adults.

---

26 The question asked respondents for ‘the main method’ of funding for ITV, Channel 4 and Five.
27 Base: All with a disability aged under 65 (496). Questions T20, T23 and T25, spontaneous responses, single coded.
28 Base: All with a disability aged under 65 (496). Question T21, spontaneous responses, multi-coded.
Concern amongst disabled people aged under 65 is higher amongst older adults (aged 45-64) with a disability and amongst those with mobility impairments. As detailed earlier, these groups are the most likely to be heavy TV viewers.

### 3.7 Interaction and personalisation

Finally, we turn to the issue of how people interact and personalise their TV. Although this is not (yet) creativity per se, it is useful to see it as a potential stepping stone to the creation of content, by enabling users to become familiar with the technology of the platform.

Amongst those with a television at home and either internet access, a mobile phone or digital TV (90% of all UK adults, 91% of disabled adults aged under 65), 38% of all UK adults under 65 and 37% of disabled adults aged under 65 have interacted having seen something on television using a mobile phone (to send a text message), the internet (to send and e-mail or visit a website) or the interactive button on their TV remote control.
Section 4

Radio

This section examines radio in depth, taking each of the core elements of media literacy and comparing responses between disabled people aged under 65 and all UK adults.

Summary

Disabled people (46%) are about as likely as all UK adults under 65 (48%) to say they have access to digital radio services.

Disabled people aged under 65 say they listen to radio (both digital and analogue) for a total of 17.7 hours per week, compared to 15.3 hours for all UK adults as a whole. People with visual impairments are more likely to listen most per week, compared to those with hearing or mobility impairments. They are also more likely to be interested in the features of digital radio.

A majority of disabled adults aged under 65 are aware that radio is regulated and are aware of how BBC radio stations are mainly funded, with fewer than half aware of how commercial radio stations are mainly funded. These measures are at broadly similar levels to those for all UK adults under 65. People with hearing impairments appear more likely to be aware.

One in seven (14%) disabled adults aged under 65 nominates (without prompting) any concerns ‘about what is on radio’. This measure is higher than that for all UK adults under 65 (10%).

As detailed earlier, 48% of all UK adults under 65 and 46% of disabled adults aged under 65 are aware they have access to digital radio services at home. Claimed ownership levels for various groups of disabled people aged under 65 are also shown below.

<table>
<thead>
<tr>
<th></th>
<th>Digital radio</th>
</tr>
</thead>
<tbody>
<tr>
<td>All UK adults under 65</td>
<td>48%</td>
</tr>
<tr>
<td>All disabled people aged under 65</td>
<td>46%</td>
</tr>
<tr>
<td>- Visually impaired</td>
<td>48%</td>
</tr>
<tr>
<td>- Hearing impaired</td>
<td>54%</td>
</tr>
<tr>
<td>- Mobility impaired</td>
<td>37%</td>
</tr>
<tr>
<td>- Aged under 45</td>
<td>47%</td>
</tr>
<tr>
<td>- Aged 45-64</td>
<td>44%</td>
</tr>
</tbody>
</table>

28 Digital radio services can be received on a DAB digital radio set, or via digital television or the internet.
4.1 Hours of radio listening per week

The volume of radio listening per week is broken down into hours per week listening at home, in the car, when out and about using a personal radio or a mobile phone (shown in Figure 11 as ‘out & about’), and at work/ school/ college. Figure 11 shows these volumes of weekly listening for all adults under 65, all disabled adults aged under 65, and particular groups of disabled adults aged under 65.

Figure 11 Hours of radio listening per week

Across all UK adults aged under 65 the average (self-reported) weekly radio listening at home stands at 7.7 hours, plus 6.6 hours elsewhere. This provides an overall estimate of 15.3 hours listening per week on average. For disabled adults aged under 65 weekly radio listening at home is significantly higher at 10.8 hours, plus 6.9 hours elsewhere, thus an overall estimate of 17.7 hours listening per week on average.

Figure 11 shows that this relatively high overall volume of listening is more evident for younger (aged under 45) disabled people. People with visual impairments are more likely than those with hearing or mobility impairments to listen more frequently. People with visual impairments are also more likely to be interested in the features of digital radio services.

We also looked at those who can be categorised as ‘heavy’ radio listeners, defined as those listening to 33 or more hours of radio (in any location) per week. This group accounts for 14% of all UK adults and 16% of all disabled adults aged under 65.

4.2 Awareness of radio regulation and commercial funding

Radio is second to TV in terms of people’s levels of awareness of regulation and how national commercial stations are mainly funded. As indicated in Figure 12, a majority of disabled adults aged under 65 are aware that radio is regulated and are aware of how BBC radio stations are mainly funded, with fewer than half aware of how commercial radio stations are mainly funded. These measures are at broadly similar levels to those for all UK adults, but a lower proportion of disabled adults aged under 65 are aware of how commercial radio stations are mainly funded (at 45% compared to 52%).

30 Base: All UK adults, all with a disability aged under 65 (2542, 496). Questions R5A-E, prompted responses, single coded.
4.3 Concerns about what is on radio

Concerns about radio content are relatively low. One in seven (14%) disabled adults aged under 65 nominates (without prompting) any concerns ‘about what is on radio’. This measure is higher than that for all UK adults under 65 (10%). Nominations, whilst low, mostly relate to content in terms of bad language (whether spoken or song lyrics) and poor quality content (in terms of advertising breaks, and content being ratings-driven).

Overall, just 1% of all UK adults under 65 and of disabled adults aged under 65 claim to be ‘very concerned’ about what is on the radio.

4.4 Interacting with radio

Finally, we wanted to assess the extent of interactivity taking place with radio content.

Amongst those who listen to the radio at all (91% of all disabled adults under 65), 15% have interacted having heard something on radio using a mobile phone (to send a text message) or the internet (to send and e-mail or visit a website). This is the same percentage as all UK adults under 65.

---

31 Base: All UK adults, all with a disability aged under 65 (2542, 496). Questions R17 and R21, spontaneous responses, single coded.
Section 5

Internet

This section examines respondents’ access to, usage of and opinions about the internet, taking each of the core elements of media literacy and comparing responses between all adults and disabled adults aged under 65.

Summary

Amongst disabled internet users aged under 65, self-reported weekly usage levels are similar to those for all UK adults aged under 65 (10.7 compared to 10.4 hours). Disabled people under 45 use the internet more frequently, for 13.8 hours per week.

Disabled adults aged under 65 make a more narrow use of the internet, with fewer users using the internet for communication, leisure and transactions than all UK adults users under 65.

Over three quarters of disabled internet users under 65 say they can use email with confidence to contact friends and family, and nearly three quarters say they can visit websites to find out the latest news. Levels of competence for other internet tasks are lower, and overall, are lower than for all UK adults users under 65.

Nearly half of disabled people aged under 65 (48%) know how the BBC website is mainly funded; matching the finding for all UK adults under 65 (49%). Around one quarter (23%) know the main way of funding for search engine websites, slightly lower than for all UK adults (28%).

Nearly half (48%) of all disabled people under 65 with the internet at home say they are interested in, and confident about, blocking viruses/spam, which is lower than the comparable measure of 58% of all UK adults with the internet at home.

Three-fifths of disabled adults aged under 65 nominate any concerns (61%); a similar figure to all UK adults under 65. Nominations from disabled adults (as with all UK adults) are dominated by content concerns.

As detailed previously, 50% of disabled adults aged under 65 have access to the internet at home, compared to 62% of all UK adults under 65.

Home internet access for various sub-groups of disabled people aged under 65 is shown below:

<table>
<thead>
<tr>
<th></th>
<th>Internet at home</th>
</tr>
</thead>
<tbody>
<tr>
<td>All UK adults under 65</td>
<td>62%</td>
</tr>
<tr>
<td>All disabled people aged under 65</td>
<td>50%</td>
</tr>
</tbody>
</table>
- Visually impaired 51%
- Hearing impaired 47%
- Mobility impaired 45%
- Aged under 45 54%
- Aged 45-64 46%

Please note that low base sizes amongst some of the sub-groups of disabled adults aged under 65 who use the internet at all mean that it is not possible to look further at responses for these groups in this section.

5.1 Weekly hours of internet use

While our focus is on internet users with home access, we were also keen to understand where else people access the internet. Three questions were asked to assess the volume of using the internet in different locations: hours per week used at home, at work/school/college, and anywhere else, as Figure 13 shows.

Figure 13 Hours of internet use per week

Across all UK adults aged under 65 the average (self-reported) weekly use of the internet stands at 10.4 hours across all locations, with this average very broadly split two-thirds at home and one-third anywhere else. Amongst internet users with a disability aged under 65, weekly use at home is similar to that for all UK adults (at 6.9 compared to 6.6 hours), as is also the case for use outside the home; leading to an average weekly use of 10.7 hours. Whilst this overall volume of use does not vary significantly from that for all UK adults under 65 who use the internet, the volume for younger people (aged under 45) with a disability is significantly higher (at 13.8 hours).

Heavy internet users were defined as those using the internet for 15 hours or more per week at any location. This group accounts for 14% of all UK adults under 65, and 15% of all with a disability aged under 65.

---

32 Base: Those under 65 who use the internet at all, all disabled people aged under 65 who use the internet (1580, 258). Questions 110A-C, prompted responses, single coded.
5.2 Monthly spend

Amongst those with the internet at home, the average (self-reported) monthly spend on the internet service received is £19 across all adults under 65 with home access, and £17 across disabled adults aged under 65 with home access.

5.3 Breadth of use of the internet

As well as volume of use, it is also important to understand the activities that people carry out online. In particular, we were interested in the range of activities displayed.

All adults using the internet at all were prompted with 24 possible uses and were asked to say for each whether they used the internet for this, and how often. The long list of types of use have been grouped into the eight broad types for ease of comparison, and are shown in Figure 14 below. Each band indicates the proportion of internet users making each type of use at least weekly, with these bands stacked on top of each other to give an indication of breadth of use amongst the different types of internet users.

![Figure 14: Key types of use made of the internet at least weekly](image)

Disabled adults aged under 65 are slightly less likely than UK adults under 65 to make each of the uses shown in Figure 14, with significantly lower use relating to Communication, Leisure and Transactions. Uses made by younger (aged under 45) disabled people do not vary significantly from all UK adults users.

Turning to the individual uses of the internet rather than the grouped areas, a similar picture emerges. Figure 15 below shows the top 10 individual uses made using the internet on at least a weekly basis for all disabled people aged under 65 with the internet.

33 The uses shown in Figure 14 under ‘Communication’ are ‘Sending & receiving e-mails’, ‘Using on-line chat rooms’, ‘Using Instant Messaging/ MSN Messenger/ AOL Messenger etc.’. The uses shown under ‘Work/ studies information’ are ‘Finding information for your work/ job/ your studies/ homework’. The uses shown under ‘Leisure information’ are ‘Following latest scores/ sports results as they happen’, ‘Finding information for your leisure time or holidays’, ‘Finding information about cinema/ theatre/ live music’. The uses shown under ‘Transactions’ are ‘Making bookings – travel, accommodation, concert tickets etc.’, ‘Shopping’, ‘Banking and paying bills’, ‘Gambling’, ‘Buying and selling on auction sites – eBay, QXL, etc.’, ‘Renting DVDs’. The uses shown under ‘Entertainment’ are ‘Gaming’, ‘Downloading music/ videos/ software’, ‘Listening to radio stations’, ‘Looking at adult-only websites’. The uses shown under ‘News’ are ‘Looking at local/ regional/ national/ international news’. The uses shown under ‘Public/ civic’ are ‘Finding out about public services’, ‘Looking at political/ campaign/ issues websites’, ‘Looking at local community websites’. The uses shown under ‘Creativity’ are ‘Maintaining a website or weblog/ blog’.

34 Base: Those under 65 who use the internet at all, disabled people aged under 65 who use the internet (1580, 258). Question I11, prompted responses, single coded.
Media Literacy Audit: Report on media literacy of disabled people

Figure 15  Top 10 weekly uses made of the internet by disabled people < 65

<table>
<thead>
<tr>
<th>Activity</th>
<th>All disabled internet users under 65</th>
<th>All UK internet users under 65</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sending/ receiving e-mails</td>
<td>61%</td>
<td>71%</td>
</tr>
<tr>
<td>Finding information for work/ studies</td>
<td>47%</td>
<td>54%</td>
</tr>
<tr>
<td>Finding information for leisure/ holidays</td>
<td>33%</td>
<td>35%</td>
</tr>
<tr>
<td>Banking &amp; paying bills</td>
<td>25%</td>
<td>32%</td>
</tr>
<tr>
<td>Using Instant Messaging</td>
<td>23%</td>
<td>31%</td>
</tr>
<tr>
<td>Looking at news</td>
<td>19%</td>
<td>25%</td>
</tr>
<tr>
<td>Downloading music/ videos/ software</td>
<td>16%</td>
<td>21%</td>
</tr>
<tr>
<td>Finding information about health issues</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>Finding information about sports</td>
<td>15%</td>
<td>21%</td>
</tr>
<tr>
<td>Shopping</td>
<td>14%</td>
<td>20%</td>
</tr>
</tbody>
</table>

5.4  Competence with internet tasks

A further way of investigating the types of skills people feel they possess online was to ask how confident they were in carrying out particular tasks. All adults with the internet at home (62% of all adults under 65, 50% of disabled people aged under 65) were prompted with a series of such tasks associated with the internet, and were asked for each one to choose from a list of possible responses to indicate if each task was of interest to them, and if so, whether it was a task they could do with confidence. Figure 16 below summarises the responses for each task for disabled people aged under 65 with the internet at home.

<table>
<thead>
<tr>
<th>Task</th>
<th>Can do with confidence</th>
<th>Interested, can’t do with confidence</th>
<th>Not interested/ no need</th>
<th>Can do, all UK adults</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use e-mail to contact friends &amp; relatives</td>
<td>78%</td>
<td>13%</td>
<td>9%</td>
<td>87%</td>
</tr>
<tr>
<td>Visit websites to find the latest news</td>
<td>73%</td>
<td>9%</td>
<td>18%</td>
<td>83%</td>
</tr>
<tr>
<td>Block e-mail spam/ unwanted e-mail messages</td>
<td>50%</td>
<td>34%</td>
<td>16%</td>
<td>59%</td>
</tr>
<tr>
<td>Block computer viruses</td>
<td>47%</td>
<td>37%</td>
<td>16%</td>
<td>58%</td>
</tr>
<tr>
<td>Edit &amp; organise photos on a computer for viewing</td>
<td>46%</td>
<td>31%</td>
<td>23%</td>
<td>59%</td>
</tr>
<tr>
<td>Listen to live radio over a computer</td>
<td>41%</td>
<td>15%</td>
<td>44%</td>
<td>50%</td>
</tr>
<tr>
<td>Listen at a later date to a radio programme already broadcast</td>
<td>32%</td>
<td>20%</td>
<td>48%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Interest in and competence in carrying out the various tasks shown in Figure 16 varies considerably across the individual tasks, and competence outweighs the proportion who are

35 Base: All disabled adults aged under 65 who use the internet (258). Question 111, prompted responses, single coded.
36 Base: All disabled people aged under 65 with the internet at home (234). Question 124, prompted responses, single coded.
interested but say they cannot do with confidence in each case. Interest in using the internet
to listen to radio is notably lower, as is also the case across all UK adults under 65 with the
internet at home. The high proportions of people not able to block viruses or spam are
discussed in the next section.

Each of the tasks detailed can be done with confidence by a lower proportion of disabled
adults aged under 65 than is the case for all adults under 65 with home internet access.
These proportions are significantly lower for four of the seven tasks: using e-mail, visiting
news websites, blocking computer viruses and editing/organising photos on a computer.
While competence levels regarding the internet are significantly lower in general, this is not
the case for younger (aged under 45) disabled adults.

5.5 Awareness of internet funding and content controls

In order to find out how knowledgeable people were about some of the funding models for
the internet, we asked about search engines - as being a key tool or gatekeeper of the
internet; and about the BBC website. We also looked at how comfortable people felt about
controlling the content they received.

Figure 17 sets out the gaps in people’s understanding of some areas of internet funding, and
also levels of confidence about setting content controls.

Figure 17 Awareness of internet funding and content controls

Half of disabled people aged under 65 know how the BBC website is mainly funded;
matching the finding for all UK adults under 65 (49%). One quarter know the main way of
funding for search engine websites, again similar to all UK adults under 65.

Turning to content controls, however, half (48%) of all internet owners with a disability aged
under 65 say they are interested in, and confident about, blocking viruses/spam (as also
shown in Figure 16), which is significantly below the comparable measure of 58% of all UK
adults under 65 with the internet at home.

---

37 Base: All disabled adults aged under 65 (496), *All with the internet at home (234). Questions I24, I31, spontaneous
responses, single coded.
38 In response to the question ‘How do you think search engine websites such as Google or Ask Jeeves are funded?’ the
‘correct’ responses were judged to be ‘advertising on the website’ and ‘advertisers pay when users click through to their
website’.
Around one in five of all adults and disabled people aged under 65 with internet access at home states that ‘someone else tends to’ block computer viruses, and / or block e-mail spam / unwanted e-mail messages.

### 5.6 Concerns about what is on the internet

As noted earlier, concerns about the internet are the highest of all the platforms analysed for all UK adults and also disabled adults aged under 65.

Three-fifths (62%) of all adults under 65 nominate any concerns, as do a similar proportion (61%) of disabled adults aged under 65.

Focusing on responses from those using the internet at home, nominations from disabled adults (as with all UK adults) are dominated by content concerns, as indicated in Figure 18, which shows the proportion of disabled adults users nominating any concerns, along with those mentioned most frequently.

#### Figure 18 Concerns about what is on the internet

<table>
<thead>
<tr>
<th></th>
<th>All UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANY NOMINATIONS</td>
<td>71%</td>
</tr>
<tr>
<td>Content offensive</td>
<td>99%</td>
</tr>
<tr>
<td>Risk to society/ standards/ values</td>
<td>43%</td>
</tr>
<tr>
<td>Risk to personal privacy</td>
<td>26%</td>
</tr>
<tr>
<td>Risk to finances/ device</td>
<td>22%</td>
</tr>
</tbody>
</table>

One in six (16%) of all UK adults claim to be ‘very concerned’ about the internet, but this measure is significantly higher for disabled adults aged under 65 (23%). Almost all of these nominate a concern relating to offensive content, plus ‘risk to society’ for a majority.

### 5.7 Creativity

Finally, we look at the issue of creativity as it relates to the internet.

Levels of creativity are not significant at present, with the extent of creativity at 15% of the potential maximum for all UK adults under 65, and 10% for disabled people aged under 65. This is based on three measures: having own website, having own weblog, and ability to edit and organise photos on a computer for viewing.

Amongst disabled people aged under 65 who use the internet at all, 5% say they have their own website and 2% say they have their own web-log / blog / on-line diary. This compares to 5% and 3% respectively for all UK internet users under 65.

The third element used to establish a measure of creativity was those with internet access at home responding that they can edit and organise photos on a computer for viewing with confidence. Amongst disabled people aged under 65 with internet access, just under half (46%) gave this response, compared to 59% of all UK adults under 65 with internet access.

---

39 Base: All disabled adults aged under 65 who use the internet at home (209). Question I32, spontaneous responses, multi-coded.

40 The potential maximum being those who have their own website and their own weblog and edit/ organise photos on a computer for viewing.
Section 6

Mobile phones

This section examines respondents’ usage of and opinions about mobile phones, taking each of the core elements of media literacy and comparing responses between disabled people and UK adults aged under 65.

Summary

Ownership of mobile phones for disabled people is somewhat lower (82%) than the all-UK adults under 65 average (90%), with people with hearing impairments less likely to own than people with either visual or mobility impairments.

Compared to all UK adults under 65, disabled people aged under 65 show similar levels of weekly calls and texts.

The top three weekly uses made by disabled people aged under 65 match those for all UK adult users, with calls coming first (81%), texts second (70%), and looking back at stored text messages third (26%).

Over three-quarters of disabled people aged under 65 say they can do a variety of tasks relating to mobile phones with confidence, for example storing a new contact (88%); changing the ring-tone (79%); and listening back to voicemail messages (78%).

44% of disabled people aged under 65 say they have concerns about mobile phones. Concern is mostly linked to risks to health.

As detailed previously, 82% of disabled adults aged under 65 have a mobile phone.

Ownership levels for various groups of disabled people aged under 65 are shown in Figure 19. Low base sizes amongst some of the sub-groups of disabled adults aged under 65 with a mobile phone mean that it is not possible to analyse these groups further in this section.

Figure 19 Ownership of mobile phones among disabled people aged under 65

<table>
<thead>
<tr>
<th>Mobile phone</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All UK adults under 65</td>
<td>90%</td>
</tr>
<tr>
<td>All disabled people aged under 65</td>
<td>82%</td>
</tr>
<tr>
<td>- Visually impaired</td>
<td>82%</td>
</tr>
<tr>
<td>- Hearing impaired</td>
<td>73%</td>
</tr>
<tr>
<td>- Mobility impaired</td>
<td>79%</td>
</tr>
<tr>
<td>- Aged under 45</td>
<td>95%</td>
</tr>
<tr>
<td>- Aged 45-64</td>
<td>73%</td>
</tr>
</tbody>
</table>
6.1 Volume of mobile phone use

Two questions were asked to assess the volume of mobile phone use: the number of calls made per week and the number of text messages sent per week. Figure 20 shows these two volumes of weekly use for all adults and for disabled people aged under 65 with a mobile phone.

Figure 20 Volume of mobile phone use per week

Across all adults users under 65 the average (self-reported) weekly volume of calls made stands at 22, plus 31 text messages sent per week. Amongst disabled people aged under 65 with a mobile phone, these weekly volumes are similar, at 19 calls and 26 text messages. Volumes are significantly lower amongst those aged 45-64 with a disability. This is unsurprising given that age has a great impact on volume of use generally, and the volume of text messages sent in particular.

We looked in more detail at those who are using their mobiles most. Two definitions are required: heavy callers and heavy texters. Heavy callers have been defined as those making over 30 calls per week. This group accounts for 17% of all UK mobile phone users under 65, and 14% of all disabled adults aged under 65.

Heavy texters have been defined as those sending over 35 texts per week. This group accounts for 26% of all UK adults under 65, and 16% of disabled adults aged under 65.

6.2 Monthly spend

Amongst all UK adults with a mobile phone aged under 65, the average monthly spend is £24, with the average for disabled people aged under 65 being £21.

41 Base: All UK adults and all disabled people aged under 65 with a mobile phone (2205, 383). Questions M8 and M9, prompted responses, single coded.
6.3 Breadth of use of mobile phones

In order to find out more about the types of activity people carry out on their mobiles, all adults with a mobile phone were prompted with 22 possible uses and were asked to say for each whether they used their mobile phone for this, and how often. The long list of types of use have been grouped into the six broad types shown in Figure 21 below. Each band indicates the proportion of mobile phone owners in each group making each type of use at least weekly, with these bands stacked on top of each other to indicate the breadth of use amongst all users and users with a disability aged under 65.

Figure 21 Key types of use made of mobile phones at least weekly

<table>
<thead>
<tr>
<th>Category</th>
<th>All adults &lt; 65</th>
<th>All disabled adults &lt; 65</th>
<th>Aged under 45</th>
<th>Aged 45-64</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>94%</td>
<td>90%</td>
<td>93%</td>
<td>87%</td>
</tr>
<tr>
<td>Internet</td>
<td>33%</td>
<td>30%</td>
<td>50%</td>
<td>46%</td>
</tr>
<tr>
<td>Advanced communication</td>
<td>17%</td>
<td>12%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>46%</td>
<td>34%</td>
<td>50%</td>
<td>46%</td>
</tr>
<tr>
<td>Archive/organiser</td>
<td>3%</td>
<td>2%</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Basic communication</td>
<td>9%</td>
<td>11%</td>
<td>10%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Mobile phone owners with a disability aged under 65 show a broadly similar breadth of use to all adults in terms of types of use made on a weekly basis. Younger (aged under 45) disabled people show a greater breadth of use, as is also the case across all younger adults.

Figure 22 below shows the top five individual uses made using mobile phones on at least a weekly basis for all disabled adults aged under 65 with a mobile phone.

---

42 Base: All UK adults and disabled people aged under 65 with a mobile phone (2205, 383). Questions M10, prompted responses, single coded.
Figure 22  Top five weekly uses made of mobile phones by disabled people < 65

<table>
<thead>
<tr>
<th>All disabled adults aged under 65</th>
<th>All adults under 65</th>
</tr>
</thead>
<tbody>
<tr>
<td>Making personal/ business calls</td>
<td>81%</td>
</tr>
<tr>
<td>Sending personal/ business text messages</td>
<td>70%</td>
</tr>
<tr>
<td>Looking back at stored text messages on your phone</td>
<td>26%</td>
</tr>
<tr>
<td>Taking photos using the phone</td>
<td>24%</td>
</tr>
<tr>
<td>Looking back at stored photos on your phone</td>
<td>20%</td>
</tr>
</tbody>
</table>

The top five uses made by disabled people aged under 65 are the same as that for all UK adult users under 65, although usage is slightly lower.

6.4  Competence with mobile phone tasks

As well as range of usage, we investigated how confident people felt about a range of ‘tasks’ relating to mobile phone use. All disabled adults aged under 65 with a mobile phone were prompted with a series of such tasks, and were asked for each one to choose from a list of possible responses to indicate if each task was of interest to them, and if so, whether it was a task they could do with confidence. Figure 23 below summarises the responses for each task.

Figure 23  Competence with mobile phone tasks

Amongst mobile phone owners with a disability aged under 65, claimed competence outweighs the proportion who are interested but can’t do with confidence by a significant margin in each case except ‘accessing mobile operator’s internet sites from your phone’.

---

43 Base: All disabled adults aged under 65 with a mobile phone (383). Question M10, prompted responses, single coded.
44 Base: All disabled adults aged under 65 with a mobile phone (383). Question M18, prompted responses, single coded.
Levels of confidence are somewhat lower than for all UK adults under 65.

### 6.5 Concerns about mobile phones

Two-fifths of all adults (41%) and of disabled adults aged under 65 (44%) nominate (without prompting) any concerns ‘about mobile phones’. The two main areas of concern for disabled people aged under 65 relate to health and a risk to society/standards/values (for example, intrusion, paedophiles contacting children, misuse of camera phones), as indicated in Figure 24.

**Figure 24 Concerns about mobile phones**

Five per cent of all adults and seven per cent of disabled people aged under 65 claim to be ‘very concerned’. Amongst those very concerned there are equal nominations relating to ‘health’ and ‘risk to society’.

---

45 Base: All disabled adults aged under 65 (496). Question M20, spontaneous responses, multi-coded.
Section 7

News

Opinions about news across the different platforms provide a useful indicator of the extent to which people evaluate content according to the platform it is received from. It is also, of course, a key factor in democratic engagement and understanding, and as such an important component of media literacy.

This section examines habits and perceptions about news provision through the use of different media for news provision, and the extent of trust that people say they have towards news outlets on the various platforms.

Summary

Sources used the most to keep up with national news by disabled people aged under 65 do not differ significantly from those of all adults under 65, with just under two-thirds using TV the most (64%); 17% nominating newspapers, and 13% the radio. There are no significant differences by sub-group.

Disabled people aged under 65 are more likely to use just one source for news, at 28% compared to 22% of all adults under 65.

Overall, levels of trust and distrust in TV and radio amongst all adults and disabled people aged under 65 are very similar, at around three-quarters of the maximum potential. Levels of trust for news websites and newspapers are lower than for TV and radio, and slightly lower amongst disabled people, especially those aged 45-64.

7.1 Sources used for news

All adults were prompted with a list of news sources and were asked to state which they use to keep up with national news, and which one of those sources they use the most for national news. Figure 25 shows the sources used at all and used most across all adults and disabled adults aged under 65.
### Figure 25 Sources used at all and used most to keep up with national news

<table>
<thead>
<tr>
<th></th>
<th>All UK adults under 65</th>
<th>All disabled adults aged under 65</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Use at all</td>
<td>Use the most</td>
</tr>
<tr>
<td><strong>%</strong></td>
<td><strong>%</strong></td>
<td><strong>%</strong></td>
</tr>
<tr>
<td>TV</td>
<td>89</td>
<td>66</td>
</tr>
<tr>
<td>Newspapers</td>
<td>67</td>
<td>18</td>
</tr>
<tr>
<td>Radio</td>
<td>44</td>
<td>10</td>
</tr>
<tr>
<td>Internet</td>
<td>21</td>
<td>4</td>
</tr>
<tr>
<td>Magazines</td>
<td>13</td>
<td>1</td>
</tr>
<tr>
<td>Teletext</td>
<td>13</td>
<td>1</td>
</tr>
<tr>
<td>Mobile news alerts</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>WAP/ mobile internet services</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Don't follow national news</td>
<td>2</td>
<td>NA</td>
</tr>
</tbody>
</table>

* Less than 0.5%

While sources used the most to keep up with national news by disabled people aged under 65 do not differ significantly from all adults under 65, there are some differences in terms of news sources used at all. Disabled people aged under 65 are less likely than all adults to use TV, newspapers, and magazines for news. These differences are found between the older and younger groups of disabled people rather than between the different disabilities, with younger disabled people (aged under 45) less likely to use TV and older (aged 45-64) less likely to use newspapers and magazines.

Disabled people aged under 65 are also more likely to use just one source for news, at 28% compared to 22% of all adults under 65.

### 7.2 Summary of extent of trust in news outlets

Figure 26 shows the index measures for the extent of trust and extent of distrust for the four media types, based on those giving ratings for any of the titles from an illustrative list within each media type.

---

46 Base: All UK adults and disabled adults aged under 65 (2542, 496). Questions Z6 and Z7, prompted responses, multi-coded for use at all, single coded for use most.

47 All adults were prompted with a list detailing particular TV, radio, internet and press news ‘titles’ in order to assess trust in news outlets. The titles were chosen to be as widely available as possible and to illustrate a range of titles for each of the four types of media. Adults were asked to use a five point scale to indicate the extent to which they would trust or distrust each news outlet. An index measure for each of the four types of media was calculated based on all giving a rating for each outlet from the list. For example, those giving a rating for two of the three newswsites of which one was a ‘would trust’ rating and one was a ‘would not trust’ rating would have an index measure of 50% for extent of trust and 50% for extent of distrust.
Figure 26 shows similar levels of trust and distrust in TV amongst all adults and disabled adults aged under 65, with trust at around three quarters of the maximum potential. Levels of trust in radio are very similar to those for TV generally. Disabled people aged under 65 show marginally lower levels of trust for each of the four media types, and whilst this level of trust is not significantly lower across all with a disability it is significantly lower amongst older (aged 45-64) disabled people.

7.3 Detail of levels of trust in news outlets

This section looks in more depth at the individual news media outlets, to explore the extent of trust apportioned.

Figures 27 and 28 below show the proportion of UK adults and disabled adults aged under 65 stating that they trust or distrust each of the particular TV, radio, and internet news ‘titles’ used to assess trust in news outlets, starting with TV and radio below. Press outlets are summarised into categories.

The TV news outlets include the bulletins from the main channels, the major UK-based news channels, Teletext, and Fox News and Al Jazeera for comparative purposes. The radio news outlets include the BBC’s Radio 4 and also the World Service. From the commercial radio sector, the national Virgin Radio was included plus generic ‘local/regional commercial stations’. Online news outlets were represented by bbc.co.uk, Yahoo and MSN, chosen because they were the sites of their type with most traffic during the period of research. Press outlets are divided into daily and weekly local and regional newspapers, national broadsheets and national tabloids.

---

48 Base: All UK adults and all with a disability aged under 65 (2542, 496). Index measures used. Question Z8, prompted responses, single coded.

49 The maximum potential being a ‘would trust’ rating for all news outlets rated.
As Figure 27 shows, levels of trust for TV and radio news outlets are at similar levels between disabled adults and all UK adults under 65. Disabled adults are slightly less likely to say they trust the news outlets however.

That said, amongst disabled people aged under 65, none of the TV or radio news outlets attract significantly higher levels of distrust. Where individual media attract a lower level of trust it is due to higher levels of don’t knows from disabled people.

As with all adults, the two TV news outlets based outside the UK (Fox News and Al Jazeera) attract the highest levels of ‘don’t knows’ amongst disabled adults aged under 65, but also the highest levels of distrust.

---

50 Base: All UK adults and disabled adults aged under 65 (2542, 496). Question Z8, prompted responses, single coded.
It is of note that BBC online news is significantly more trusted amongst both groups than either Yahoo News or MSN News – quite possibly an outcome of the strength of its existing brand in this regard on TV and radio – but still much less trusted than BBC TV or radio news.

Newspapers have the highest levels of distrust compared to UK TV, radio and news websites, with distrust levels increasing through local and regional newspapers, ‘broadsheets’, to the ‘tabloids’. Levels of distrust do not differ for disabled adults aged under 65, but again we see slightly higher levels of ‘don’t knows’ for newspapers.

Disabled adults aged under 65 are have lower levels of trust for all types of newspapers, bar ‘tabloids’, than all adults aged under 65. For example, 37% of all adults under 65 with a disability say they trust ‘broadsheet’ newspapers compared to 46% of all adults aged under 65.

---

51 Base: All UK adults and disabled adults aged under 65 (2542, 496). Question Z8, prompted responses, single coded.
Section 8

Attitudes and preferences

In this final section of the report we consider the four main platforms together, and examine people’s attitudes and preferences to them. We look first at which media people are using, and which they are most attached to.

We then look at attitudes towards technology generally, and attitudes towards the need for protection on different platforms, before focusing on the types of media education and training that people have had, and which they are most interested in.

Summary

Some 44% of disabled people aged under 65 say they would miss watching television the most, similar to all UK adults under 65 (42%). Listening to music is next for disabled people, with 17% saying they would miss it most (compared to 14% for all UK adults). Those with visual impairments are more likely to miss listening to radio and to music than those with mobility or hearing impairments.

When asked about preferred ways of learning about digital technologies, respondents with a disability aged under 65 do not differ from all adults, with reading the manual/following the instructions the most popular way to learn, followed by learning from friends and family. Those with a hearing impairment and younger (aged under 45) disabled people are significantly more likely to name learning through trial and error, with those with hearing impairments also more likely to nominate reading the manual and learning through friends and family.

One third of disabled people aged under 65 (34%) say they are interested in learning more about these elements (compared to a similar figure for all UK adults under 65 of 37%). One in five (18%) is interested in learning about using the internet and one in ten (11%) about creating a website. Interest beyond these media topics is low.

One quarter of disabled adults aged under 65 (25%) say they have experience of learning about any of these media topics (again dominated by using the internet (18%) and creating a website (8%)), similar to UK adults overall (at 26% with any experience).

Experience of learning is higher for disabled people aged under 45, at 33% compared to 19% of those aged 45-64. Those with mobility impairments are the least likely to have experience of learning about these media topics (9%), and are also less likely to be interested in learning (22%).
8.1 Media usage and attachment

A key theme for the media literacy audit is to understand media platforms in relation to each other, to see how the balance of usage is currently constituted and be in a position to track how this may change over time. All adults were asked to choose from a list of nine media activities to indicate which they regularly do, and which of these they would miss doing the most. Figure 29 shows the findings from these two questions for all adults under 65, alongside disabled adults aged under 65.

**Figure 29 Preferred media activity**

<table>
<thead>
<tr>
<th></th>
<th>All UK adults under 65</th>
<th>All disabled adults aged under 65</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Regularly do</td>
<td>Would miss the most</td>
</tr>
<tr>
<td>Watch television</td>
<td>95%</td>
<td>42%</td>
</tr>
<tr>
<td>Use a mobile phone</td>
<td>82%</td>
<td>12%</td>
</tr>
<tr>
<td>Listen to the radio</td>
<td>78%</td>
<td>10%</td>
</tr>
<tr>
<td>Read newspapers/ magazines</td>
<td>77%</td>
<td>5%</td>
</tr>
<tr>
<td>Listen to music on hi-fi etc.</td>
<td>76%</td>
<td>14%</td>
</tr>
<tr>
<td>Watch videos/ DVDS</td>
<td>70%</td>
<td>2%</td>
</tr>
<tr>
<td>Use the internet via a computer/ laptop</td>
<td>58%</td>
<td>9%</td>
</tr>
<tr>
<td>Play console/ computer games</td>
<td>26%</td>
<td>1%</td>
</tr>
<tr>
<td>Listen to a portable music device/ MP3 player</td>
<td>21%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Disabled people are less likely than all UK adults under 65 to use these types of media, with the exception of TV viewing and radio listening.

The activities that would be missed most do not differ significantly between all adults under 65 and disabled people aged under 65. It appears that people with visual impairments are more likely to miss listening to the radio and to music than those with mobility or hearing impairments, and that those with mobility impairments are more likely to miss the television most.

---

52 ‘Regularly do’ being defined by respondents themselves.
53 Base: All UK adults and disabled people aged under 65 (2542, 496). Questions A4 and A5, prompted responses, multi-coded for regularly do, single coded for would miss doing the most.
8.2 Amount of leisure time spent at home

Opportunities to use the various media devices and platforms features in the audit will clearly be impacted by the amount of time spent at home, and this is something we might expect to vary depending on whether people have a disability, and the type of disability they have. Figure 30 below indicates the proportion of all adults, all disabled adults aged under 65, and sub-groups of disabled adults aged under 65 who say they spend all or nearly all of their leisure time at home.

Figure 30 Spend all/ almost all leisure time at home^54

Disabled adults aged under 65 are significantly more likely to spend all or most of their leisure time at home than all adults aged under 65 (at 19% compared to 12%). Those with mobility impairments are – perhaps unsurprisingly – most likely to spend all or almost all of their leisure time at home.

Age appears to be a factor in the amount of leisure time spent at home: as noted in our supplementary report on older people, 37% of those aged over 65 spend all or almost all of their leisure time at home, rising to 44% of disabled people aged over 65.

8.3 Attitudes towards new technology

Respondents were prompted with four statements regarding attitudes towards new technology and were asked the extent to which they agreed or disagreed with each of them.

---

^54 Base: All UK adults and disabled adults aged under 65 (2542, 496). Questions A1A-E, prompted responses, single coded.
Across all adults under 65 what emerges is a mixed, somewhat contradictory picture – people are both cautious about technology, yet also say they embrace it. Amongst disabled adults aged under 65, the pattern is similar, but with slightly more caution overall.

Disabled adults aged under 65 are less likely to agree they try to keep up with technology, with this is more marked for those with visual impairments. A lower proportion of disabled adults disagree that people rely too much on technology nowadays.

8.4 Media education and training

We asked for people’s preferred methods of learning about ‘digital television and radio, the internet and mobile phones’. They were prompted with five ways to choose from. Figure 32 shows the responses for each of the five ways of learning amongst all UK adults under 65, disabled people aged under 65, plus various sub-groups of disabled people.

---

55 Base: All UK adults and disabled adults aged under 65 (2542, 496). Questions A1A-E, prompted responses, single coded.
56 Choosing as many of the five ways as applied to them.
As shown in Figure 32, respondents from disabled people aged under 65 as a whole do not differ from those given by all adults under 65, with reading the manual/following the instructions the most popular way to learn, followed by learning from friends and family. Those with a hearing impairment and younger (aged under 45) disabled people are more likely to name learning through trial and error, with those with hearing impairments also more likely to name reading the manual and learning through friends and family.

We further explored the prospect of training and education about the media by asking whether people had learnt about a variety of different media topics, ranging from skills to more creative applications, as well as some traditional ‘media studies’ topics such as how TV programmes are made. The results for disabled people aged under 65 are shown in Figure 33.

---

**Figure 32  Preferred ways to learn about digital services and products**

As shown in Figure 32, respondents from disabled people aged under 65 as a whole do not differ from those given by all adults under 65, with reading the manual/following the instructions the most popular way to learn, followed by learning from friends and family. Those with a hearing impairment and younger (aged under 45) disabled people are more likely to name learning through trial and error, with those with hearing impairments also more likely to name reading the manual and learning through friends and family.

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We further explored the prospect of training and education about the media by asking whether people had learnt about a variety of different media topics, ranging from skills to more creative applications, as well as some traditional ‘media studies’ topics such as how TV programmes are made. The results for disabled people aged under 65 are shown in Figure 33.

---

Base: All UK adults and disabled people aged under 65 (2542, 496). Question Z4, prompted responses, multi-coded.
One third of disabled people aged under 65 (34%) say they are interested in learning more about these elements (compared to a similar figure for all UK adults under 65 of 37%). One in five (18%) is interested in learning about using the internet and one in ten (11%) about creating a website. Interest beyond these media topics is low.

One quarter of disabled adults aged under 65 (25%) have experience of learning about any of these media topics (again dominated by using the internet (18%) and creating a website (8%)), which does not differ significantly from adults overall (at 26% with any experience).

Experience of learning is higher for disabled people aged under 45, at 33% compared to 19% of those aged 45-64. Those with mobility impairments are the least likely to have experience of learning about these media topics (9%), and are also less likely to be interested in learning (22%).

---

58 Base: All disabled adults aged under 65 (496). Questions Z16 and Z17, prompted responses, multi-coded.
Looking forward

The key conclusions from this report on disabled people aged under 65 can be distilled into a small number of inter-related themes.

- While we recognise there are significant differences between sub-groups of disabled people, overall, there are few major differences between disabled people as a whole (defined as those who have any kind of impairment that limits daily life or work) and the overall UK population aged under 65.

- While levels of ownership of digital television and access to digital radio services are equivalent to all UK adults under 65, general television viewing and radio listening is higher. Internet and mobile phone penetration is lower than the equivalent UK average, although usage levels are similar.

- Levels of competence and confidence in the platforms are at lower levels than for all UK adults (aged under 65), although these differences are not large.

- Levels of concern about television content tend to be somewhat higher for disabled people, particularly for those with mobility impairments.

- Disabled people show the same levels of interest in and experience of learning about digital technologies as the UK as a whole, although those with mobility impairments are less likely to be interested or to have had experience of learning.

Because media literacy encompasses such a broad spectrum of issues and areas, it is impossible to reach an unqualified verdict on the present overall state of media literacy across the UK. Rather, the picture is mixed, with different elements of media literacy on different media platforms for different types of person showing different results.

The question that remains is whether, given the potential for harmful and offensive content on the newer platforms, the levels of understanding and ability to use the available functions is acceptable or whether users need to be encouraged to expand their platform ‘repertoire’ to include newer functions, building on their existing knowledge and skills.

This audit provides a useful first step in benchmarking a number of these key elements of media literacy as they relate to disabled people, for both Ofcom and its stakeholders to digest and build upon.
Annex 1

Research methodology

‘Core’ interviews with adults

A total of 2,357 ‘core’ interviews were conducted in English with adults aged 16 and over. All interviews were conducted in the respondents’ homes by a team of interviewers across 303 locations in the UK. Minimum quotas were applied for these interviews based on the respondent’s age, gender and working status in order to achieve samples of interviews which were representative for each of the four UK nations. The count of ‘core’ interviews per nation is 1,078 in England, 414 in Scotland, 429 in Wales, and 436 in Northern Ireland.

Boost interviews were also conducted with a variety of population sub-groups, bringing the overall total of interviews with adults to 3,244.

Interviews with adults with visual or hearing impairments

The ‘core’ interviews with adults were boosted with an additional 50 interviews with adults aged 16-65 with visual impairments and an additional 53 interviews with adults aged 16-65 with hearing impairments. In both cases these impairments were self-defined by respondents, with all adults taking part in the research indicating which, if any, types of physical impairments they have (question S4). These boost interviews were mostly achieved through interviewers visiting blind centres and deaf clubs in order to approach potential research respondents, with qualified British Sign Language users assisting the interviewer where necessary. Amongst those with visual impairments there were no requests for a Braille version of the questionnaire, instead the prompt material and self-completion elements of the questionnaire were read out to respondents by the interviewers.

Interviews with adults in low income households

For the purposes of this audit, low income households have been defined as those with a total annual household income of under £11,500 before tax and deductions.

Interviews with adults

The data reported in this document has been weighted to match the profile for each of the four UK nations in respect of age, gender, working status and social economic grade. The boost interviews conducted have been corrected ahead of this weighting in order not to skew the overall profiles. Figure 34 below shows the breakdown of the 496 interviews conducted with disabled adults under 65 in terms of the reported sub-groups.

59 The questionnaire is available at www.ofcom.org.uk/advice/media_literacy.
### Figure 34  Number of interviews conducted within each reported sub-group

<table>
<thead>
<tr>
<th>Category</th>
<th>Interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>All disabled people aged under 65</td>
<td>496</td>
</tr>
<tr>
<td>- Visually impaired</td>
<td>143</td>
</tr>
<tr>
<td>- Hearing impaired</td>
<td>97</td>
</tr>
<tr>
<td>- Mobility impaired</td>
<td>104</td>
</tr>
<tr>
<td>- Aged under 45</td>
<td>206</td>
</tr>
<tr>
<td>- Aged 45-64</td>
<td>290</td>
</tr>
</tbody>
</table>
Annex 2

Technical appendix

Sample design

For the ‘core’ interviews with adults, quotas were set to achieve a minimum of 1,000 interviews in England and 400 interviews in each of Scotland, Wales and Northern Ireland. Interviews were conducted across 303 sampling points: 138 in England and 55 in each of the other three nations. Quotas were set for each individual sampling point in terms of the age, gender and working status of the adults to be interviewed, with these quotas representing the demographic profile of the sampling point in question.

A specialist sampling agency (Business Geographics) was used to draw the sampling points and prepare the quotas for each sampling point, using Output Areas (OAs) as classified by the 2001 Census. Interviewers were then provided with specific addresses to approach regarding the research. The average OA contains around 130 households in England and Wales, around 160 households in Scotland, and around 150 households in Northern Ireland. This approach therefore affords tight control over the addresses an interviewer can call at. All interviews were conducted in respondents’ homes, using paper questionnaires and prompt material.

The OAs selected as sampling points for each nation were chosen to be representative of the nation in question in terms of urbanity. Each OA carried the Business Geographics Urbanity Indicator; comprising seven categories classified according to the size of the settlements they contained and the degree of isolation as determined by their proximity to larger settlements. The classification is defined in the following table.

Figure 35  Classification of urbanity indicators

<table>
<thead>
<tr>
<th>Category</th>
<th>Urbanity</th>
<th>Category Name</th>
<th>Definition</th>
<th>Residential addresses</th>
<th>Interviews achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Urban</td>
<td>Large City</td>
<td>The 9 largest cities in GB</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>2</td>
<td>Urban</td>
<td>City/Large Town</td>
<td>Other settlements over 100,000 population</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>3</td>
<td>Urban</td>
<td>Medium Town</td>
<td>Settlements 10,000-100,000 population</td>
<td>37%</td>
<td>36%</td>
</tr>
<tr>
<td>4</td>
<td>Urban</td>
<td>Small Satellite Town</td>
<td>Settlements 2,000-10,000 population and within 10 miles from a larger settlement</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>5</td>
<td>Urban</td>
<td>Isolated Small Town</td>
<td>Settlements 2,000-10,000 population and more than 10 miles from a larger settlement</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>6</td>
<td>Rural</td>
<td>Accessible Rural</td>
<td>Settlements less than 2,000 population and less than 10 miles from a larger settlement</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>7</td>
<td>Rural</td>
<td>Remote Rural</td>
<td>Settlements less than 2,000 population and more than 10 miles from a larger settlement</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>
The ‘core’ interviews with adults were supplemented with a series of boost interviews: broadband owners in Wales and Northern Ireland, adults aged under 65 with visual impairments, adults aged under 65 with hearing impairments, and adults from minority ethnic groups, as detailed in Annex 1.

**Weighting**

The ‘boost’ interviews detailed previously were weighted back to their natural incidence in a pre-weighting stage. All data was subsequently weighted to the profile for each of the four UK nations using target rim weights for age, gender, social grade, working status and region. The weighting figures are from the 2001 Census data, and are shown in Figure 36 below.

**Figure 36 Weighting profiles for UK nations and regions**

<table>
<thead>
<tr>
<th>Figures are based on household (except social grade which is based on those 16-64)</th>
<th>UK</th>
<th>England</th>
<th>Wales</th>
<th>Scotland</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender – Male 15+</td>
<td>48%</td>
<td>48%</td>
<td>48%</td>
<td>47%</td>
<td>48%</td>
</tr>
<tr>
<td>Gender – Female 15+</td>
<td>52%</td>
<td>52%</td>
<td>52%</td>
<td>53%</td>
<td>52%</td>
</tr>
<tr>
<td>Age – 15-34</td>
<td>33%</td>
<td>33%</td>
<td>31%</td>
<td>32%</td>
<td>37%</td>
</tr>
<tr>
<td>Age – 35-54</td>
<td>35%</td>
<td>35%</td>
<td>34%</td>
<td>35%</td>
<td>34%</td>
</tr>
<tr>
<td>Age – 55+</td>
<td>33%</td>
<td>33%</td>
<td>35%</td>
<td>33%</td>
<td>29%</td>
</tr>
<tr>
<td>Social Grade - AB</td>
<td>24%</td>
<td>26%</td>
<td>21%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>Social Grade – C1</td>
<td>30%</td>
<td>30%</td>
<td>28%</td>
<td>27%</td>
<td>29%</td>
</tr>
<tr>
<td>Social Grade – C2</td>
<td>18%</td>
<td>18%</td>
<td>20%</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>Social Grade - DE</td>
<td>27%</td>
<td>26%</td>
<td>31%</td>
<td>34%</td>
<td>30%</td>
</tr>
<tr>
<td>Working Status – working</td>
<td>57%</td>
<td>57%</td>
<td>51%</td>
<td>55%</td>
<td>51%</td>
</tr>
<tr>
<td>Working Status – not working</td>
<td>43%</td>
<td>43%</td>
<td>49%</td>
<td>44%</td>
<td>49%</td>
</tr>
<tr>
<td>Region - London</td>
<td>12%</td>
<td>15%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – South East</td>
<td>14%</td>
<td>16%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – South West</td>
<td>8%</td>
<td>10%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – Midlands/East</td>
<td>25%</td>
<td>30%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – North East</td>
<td>13%</td>
<td>15%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – North West</td>
<td>11%</td>
<td>14%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region - Scotland</td>
<td>9%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region - Wales</td>
<td>5%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – Northern Ireland</td>
<td>3%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>