ComReg Trends Survey 2007

Research on the experiences of electronic communications services by users with disabilities

Survey Results

Prepared by Amárach Consulting

October 2007

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Introduction

Introduction

- The research contained in this report is based on a booster to the quarterly Trends survey by Amárach Consulting of 1,010 adults throughout Ireland, aged 15-74. This booster survey was conducted among 350 additional people with disabilities. For the purposes of this survey, the CSO definition of disability was used to identify potential respondents. The figures presented in this report are based on a total sample of 394 people with disabilities.

- The survey was conducted in February/March 2007, and the results have been weighted up to the total adult population aged 15-74 using the most recent CSO statistics.

- In presenting the findings we have taken care to report the sample sizes for each question analysed and we would draw the reader's attention to the table at the end of this report explaining the statistical variance applicable to all survey based studies of this nature.

- While this report looks only at the disabled user population, full results for the Trends survey sample of 1,010 adults were previously published by ComReg,

More information on disability statistics CSO can be found at:

http://www.cso.ie/statistics/disabilitybyagegroup2002.htm

Fixed Phone Usage

Summary of Findings – Fixed Line Phone

- Respondents with disabilities were just as likely as the overall population to have a subscription to a fixed line telephone service in the home.

- Respondents with disabilities were more likely than the overall population to cite the cost of calls and line rental as the reason why they did not subscribe to a fixed line service.

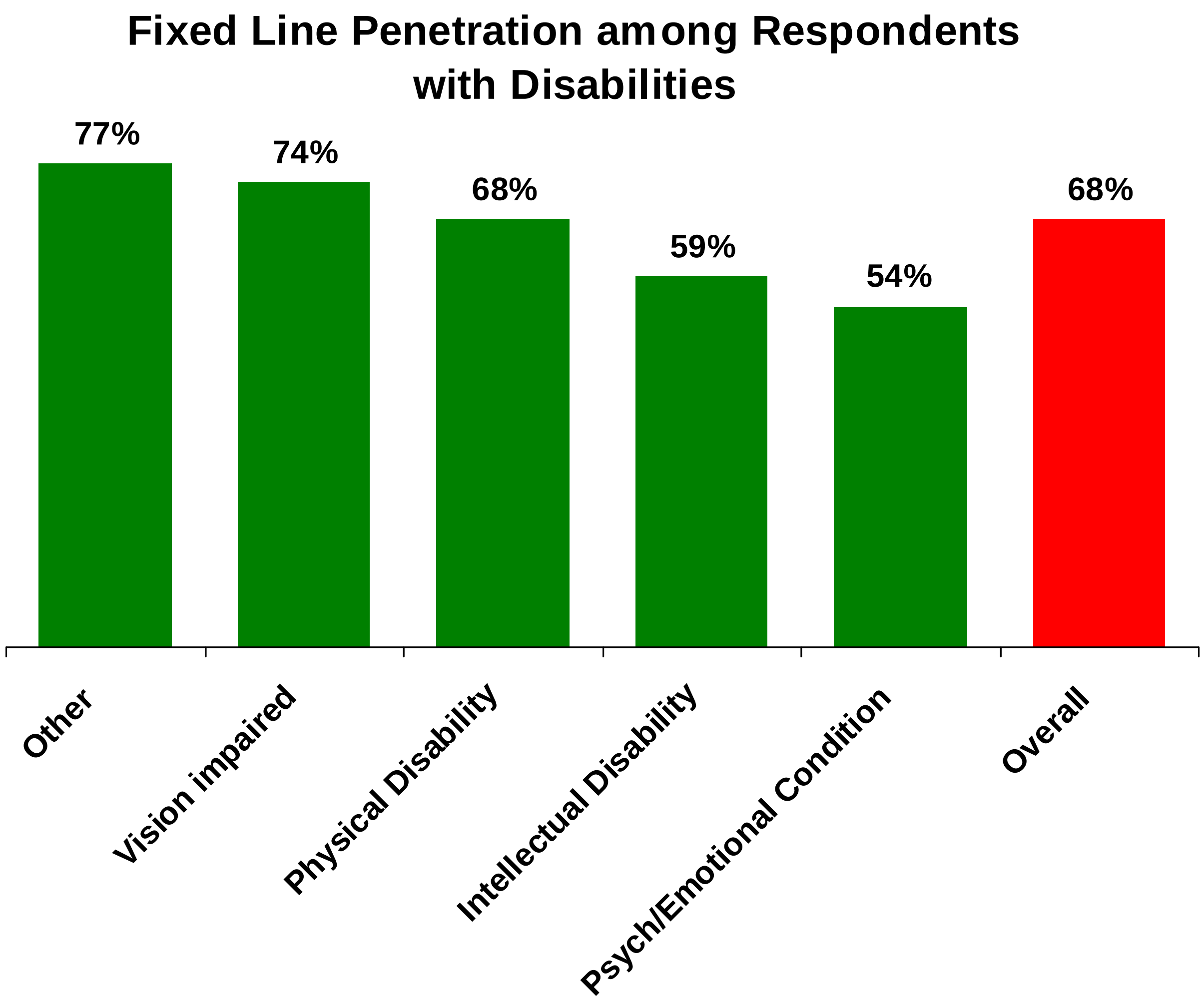
- Fixed line users with disabilities were less likely to report having shopped around to compare prices between operators. Fixed line customers with disabilities were also more likely than the overall population to cite the reputation of the operator as an important factor when choosing a fixed line provider.

- Fixed line customers with disabilities spend on average €85.56 every 2 months on fixed line telephone services compared with €97.20 for all fixed-line customers.

- Over 50% of disabled respondents were not aware of any special products, services or provisions made by operators to support their use of fixed line voice services. Awareness of items of 'hardware' and assistive technology is higher than that of service elements such as customer service initiatives and billing provisions by operators.

- Less than 1 in 10 fixed line subscribers with disabilities have approached their fixed line service provider directly seeking special services or equipment.

Fixed Line Penetration is in Line with Total Population Average



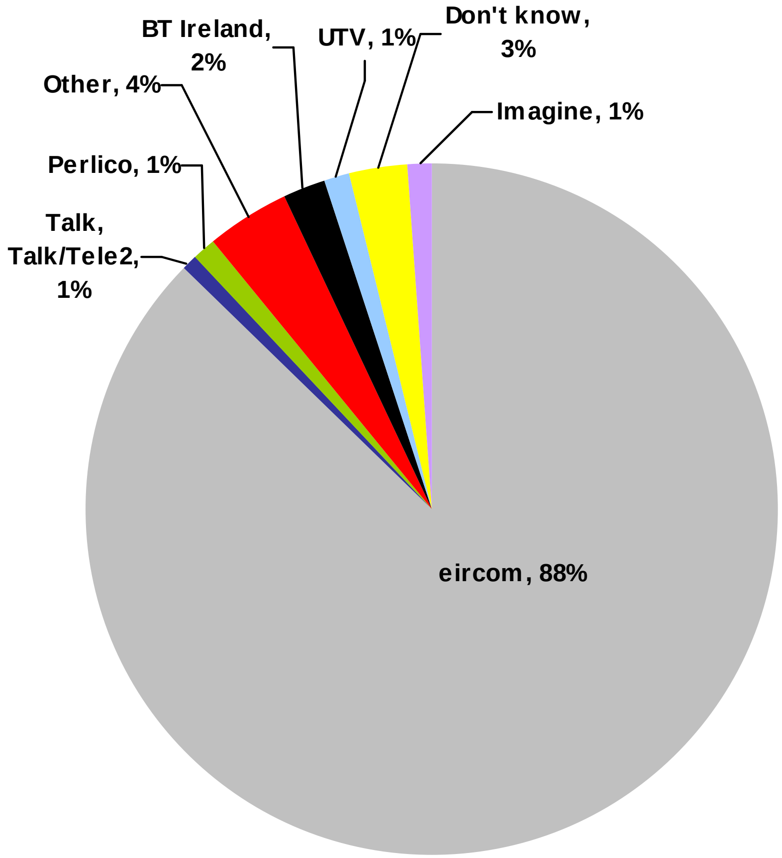
- Fixed Line penetration among consumers with disabilities is similar to that of the overall population.
- As in the overall population, fixed line users with disabilities are most likely to be older, have home internet access, and/or have a higher income.

- Disabled users with no home fixed line subscriptions are more likely to cite cost as a reason for not subscribing to a fixed line telephone than the total population (36% compared to 23% of all respondents)

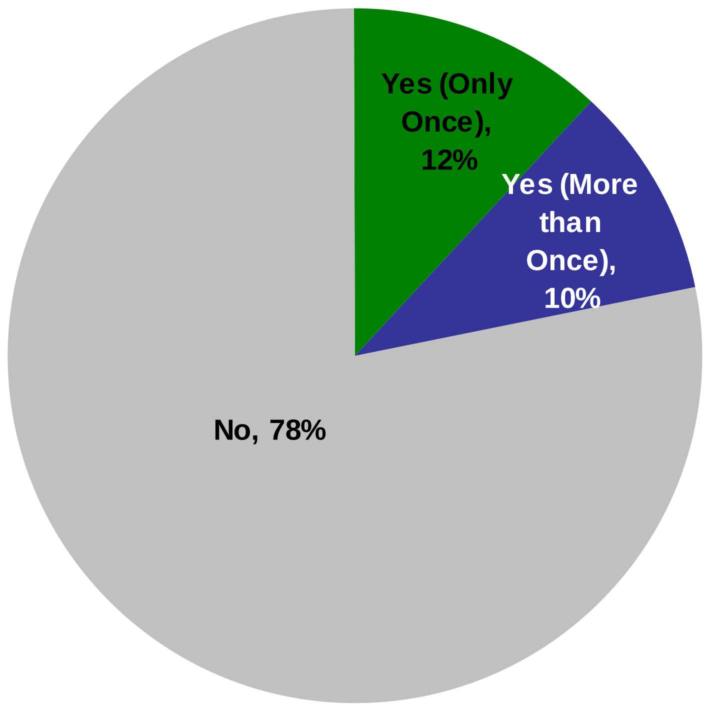
Do you have a residential fixed line phone in your home, i.e. not a mobile phone?
Base N= 394

Eircom is the largest operator for fixed line customers

88% of fixed line subscribers with disabilities use eircom as their operator.

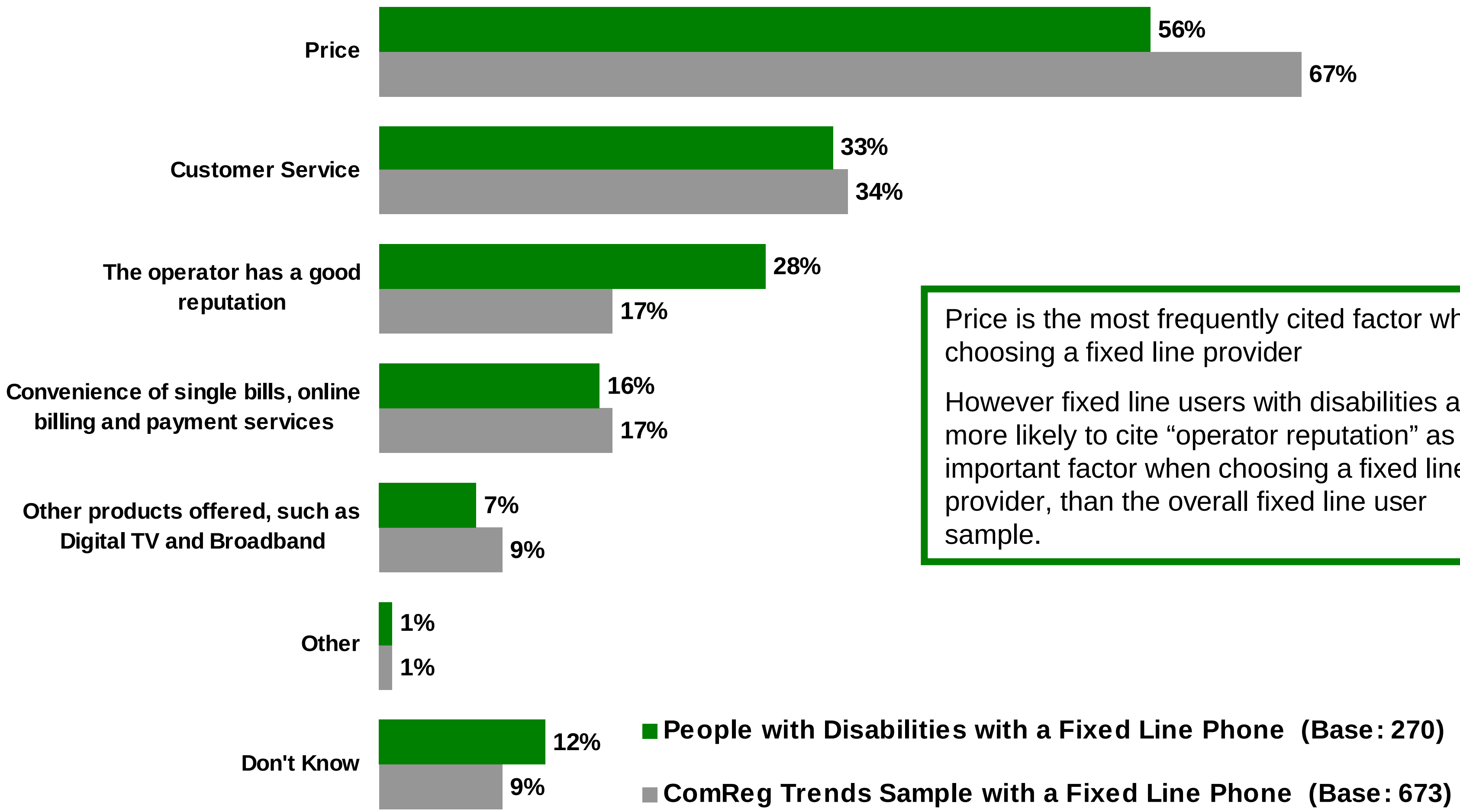


22% of fixed line users with disabilities have shopped around to compare prices among operators compared to 34% of total fixed line users interviewed.



Base: People with Disabilities who have a Fixed Line Phone N = 270

Price ,Customer Service and Operator's Reputation of key importance with selecting an operator

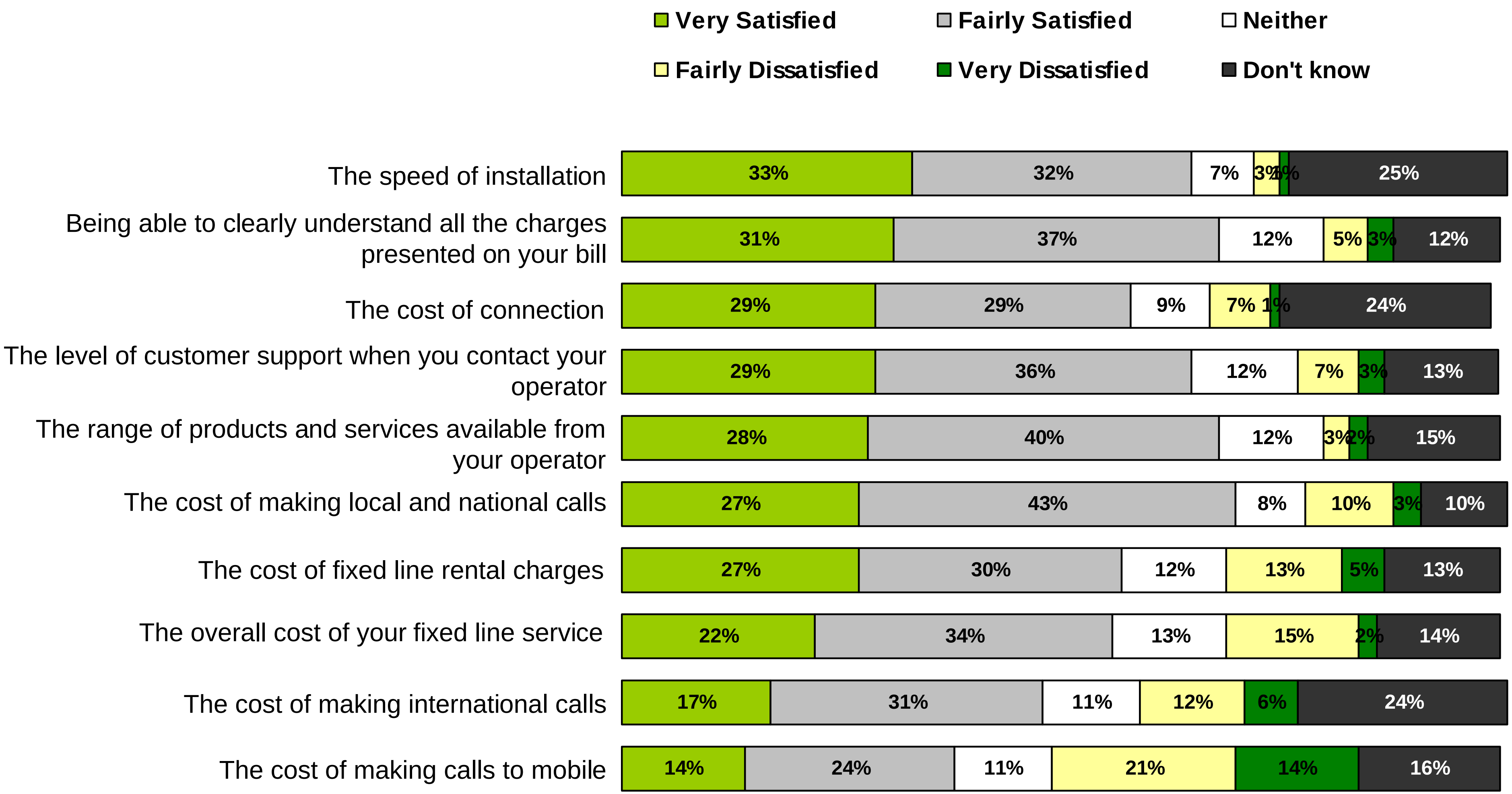


Price is the most frequently cited factor when choosing a fixed line provider

However fixed line users with disabilities are more likely to cite "operator reputation" as an important factor when choosing a fixed line provider, than the overall fixed line user sample.

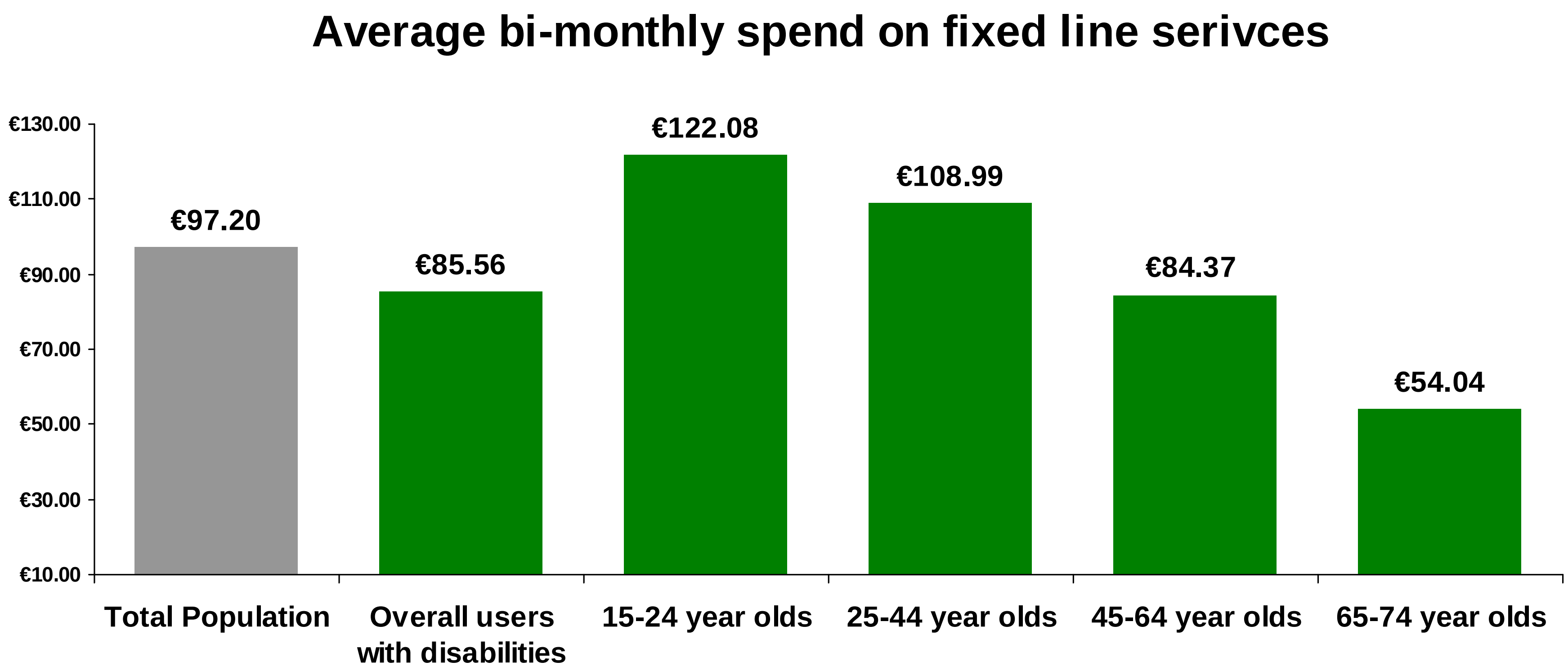
What factors do you consider most important when selecting a home fixed line provider?

Satisfaction high for installation and billing, lower on cost



On a scale of 1-5 where 1 indicates very dissatisfied, and 5 indicates very satisfied, please rate your satisfaction with the following aspects of your telephone service?
Base= People with Disabilities who have a Fixed Line Phone N = 270

Bi-monthly spend on fixed line telecoms slightly lower among users with disabilities

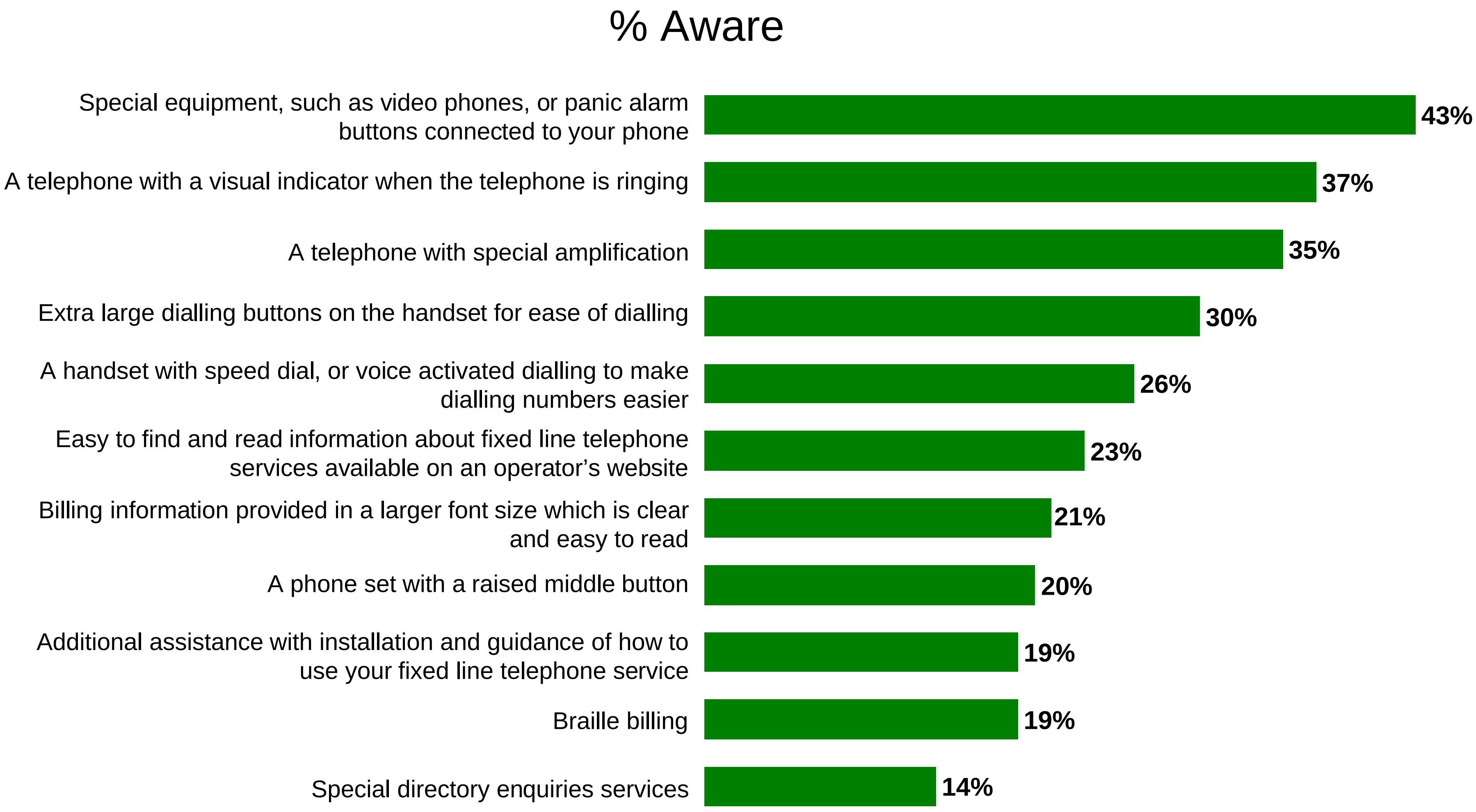


Among the sample of users with disabilities, there is evidence that the age of the fixed line subscriber is a key determinant in fixed line spend.

On average, fixed line subscribers with disabilities have a lower average spend than the overall population.

How much, approximately, was your last bi-monthly telephone bill from your service provider?
Base: People with Disabilities who have a Fixed Line Phone N = 270

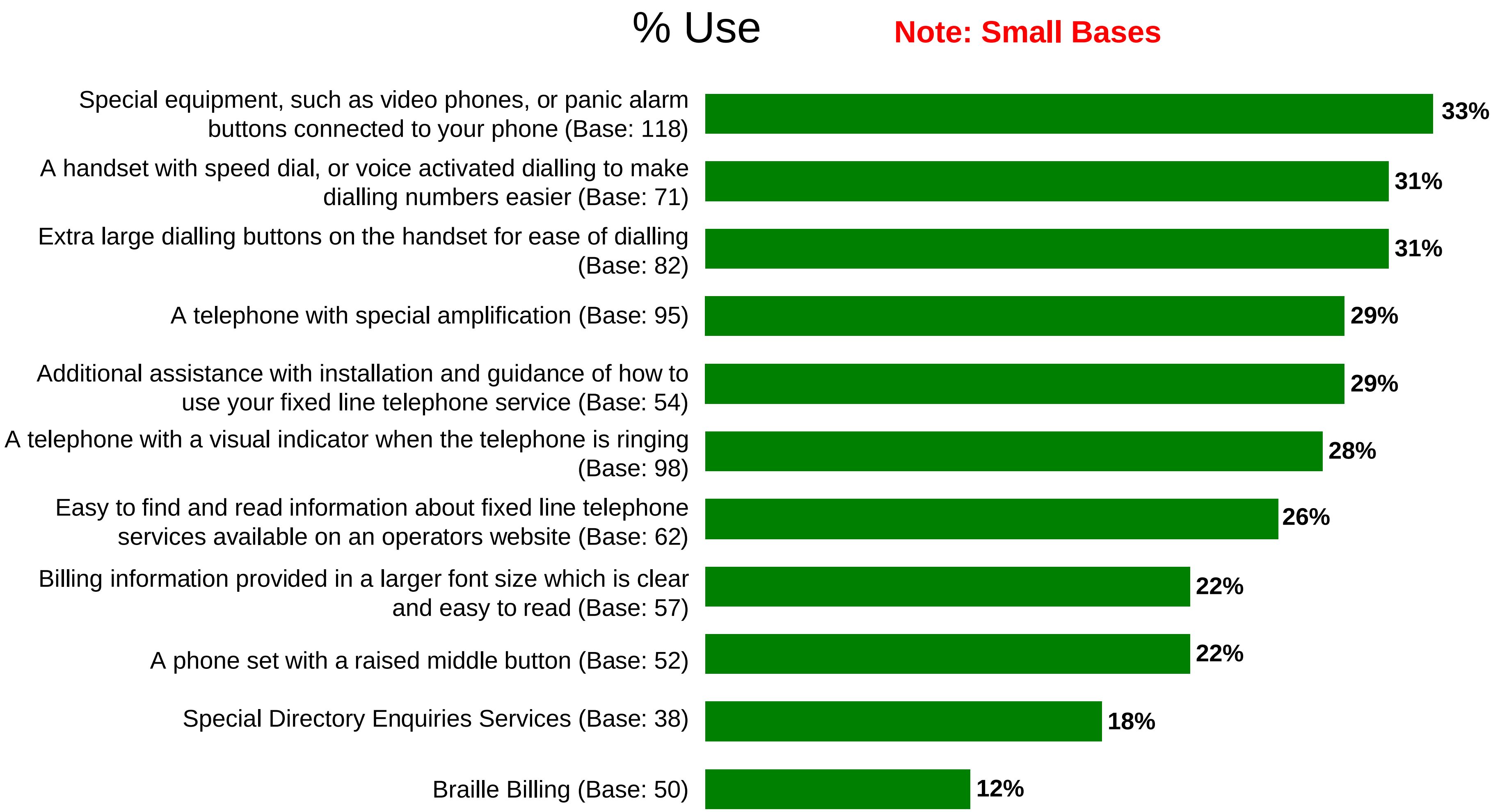
Awareness of special equipment higher than operator services to aid subscribers with disabilities.



Are you aware of the following fixed line telephone services which are aimed at making fixed line telephone services more accessible to disabled users?

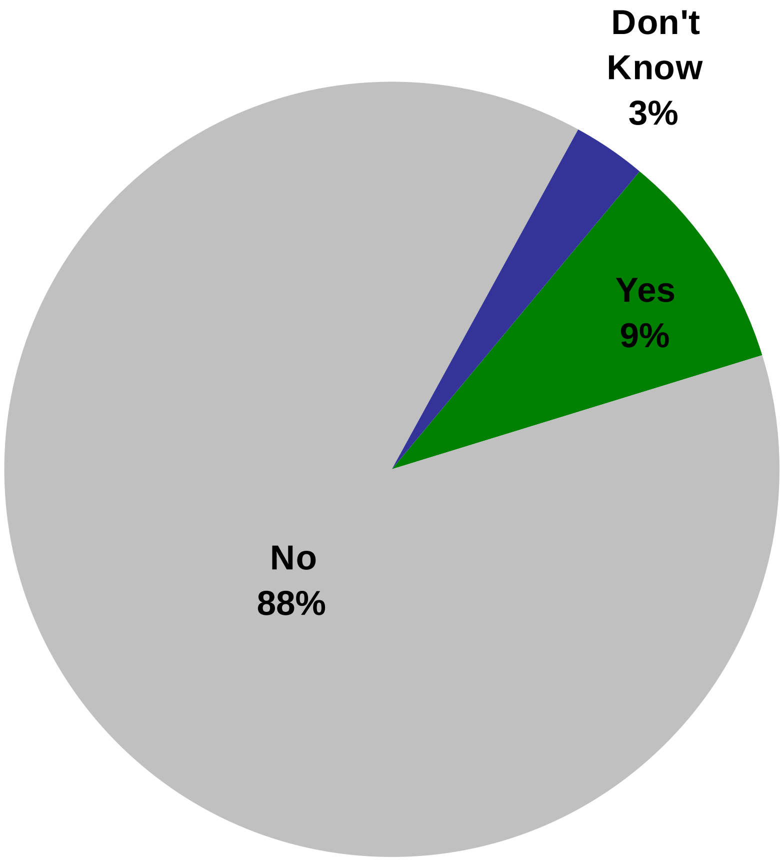
Base: People with Disabilities who have a Fixed Line Phone N = 270

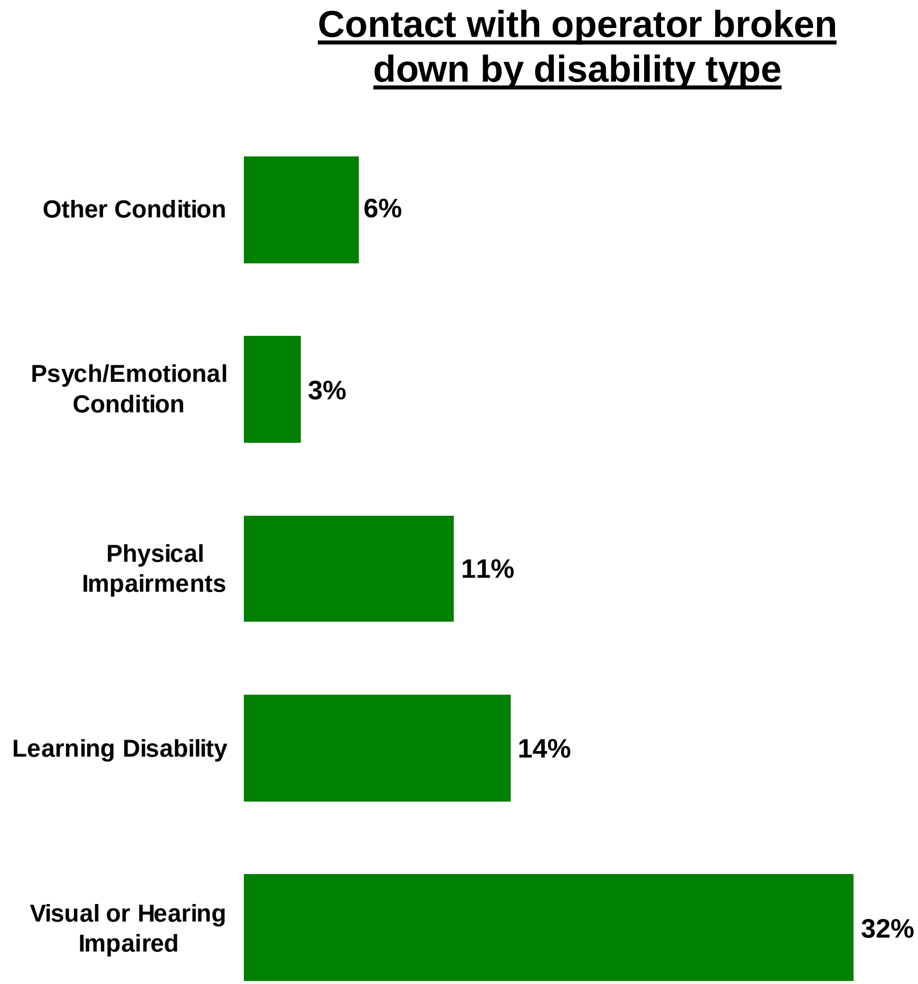
Relatively low numbers of users with disabilities availing of a variety of aiding services.



Do you use any of the following fixed line telephone services which are aimed at making fixed line telephone services more accessible to disabled users?

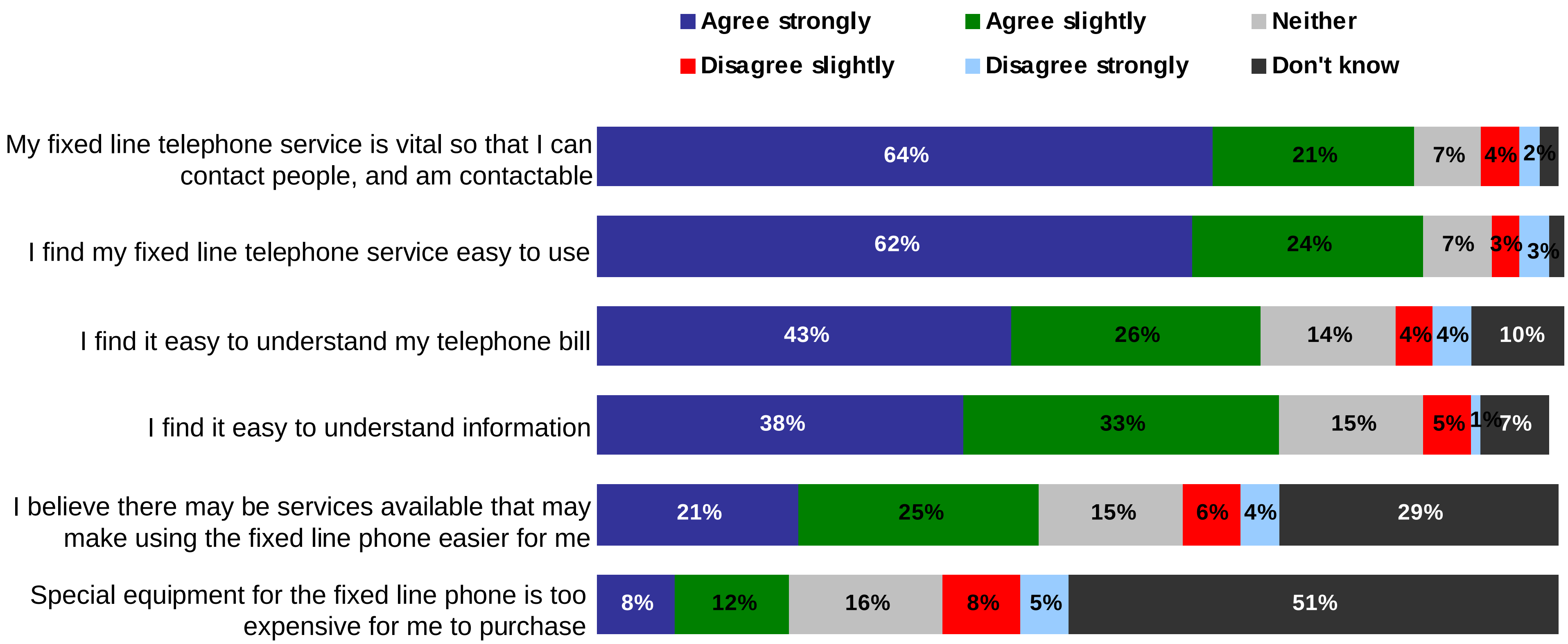
9% of fixed line subscribers with disabilities have contacted their operator with regard to equipment or services which may aid their use of fixed voice services





Have you ever approached your operator regarding special equipment or services which would make using your fixed line service easier to use?
Base: People with Disabilities who have a Fixed Line Phone N = 270

85% believe that a fixed line is a vital service



Please rate the following statements based on a scale of 1-5 where 1 means strongly disagree, and 5 means strongly agree.

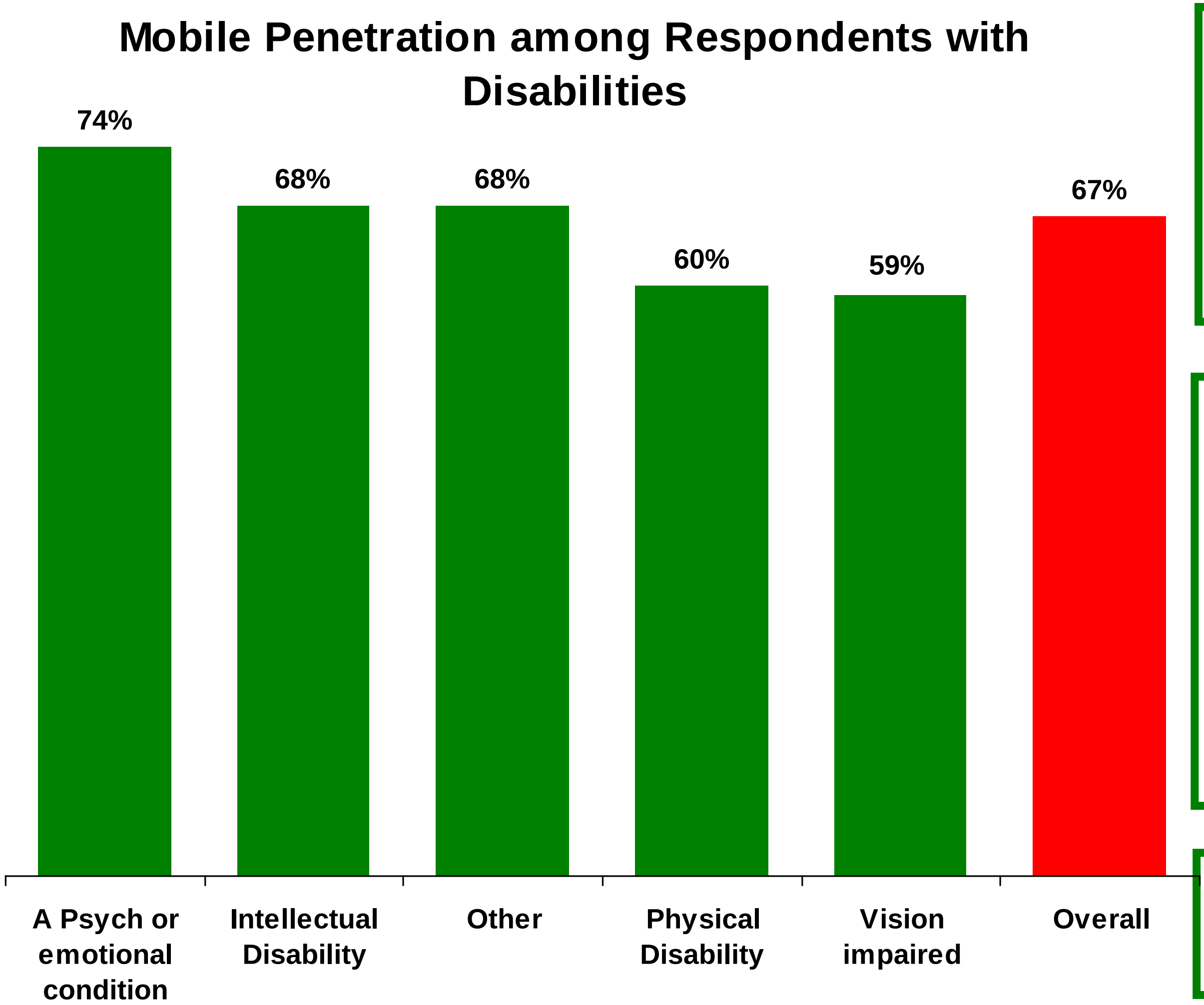
Base: People with Disabilities who have a Fixed Line Phone N = 270

Mobile Phone Usage

Summary of Findings – Mobile Phone

- 67% of respondents with disabilities reported having a mobile subscription, compared to 85% usage reported in the overall population.
- Use of prepaid mobile phones is higher among people with disabilities at 87% than among the overall population (73%), although there is no difference in terms of the providers used and in take-up of 3G technology.
- Mobile phone users with disabilities make an average of 4 mobile calls a day, and send on average 4 text message.
- 27% of mobile phone users with disabilities had shopped around to compare prices between mobile operators, compared to 41% of the overall population.
- While almost half of mobile users with disabilities were aware of the use of text and picture messaging as an alternative to voice calling, awareness of other assistive technologies was relatively low.
- Only 5% of mobile users with disabilities who have a mobile phone have approached their provider directly regarding equipment or services which may aid their use of mobile phone services.

Mobile Penetration among respondents with disabilities is lower than that of the overall population



Compared to the overall population, people with disabilities are less likely to have a mobile telephone.

However in contrast to the overall population, penetration of fixed telephones is higher than mobile penetration among users with disabilities

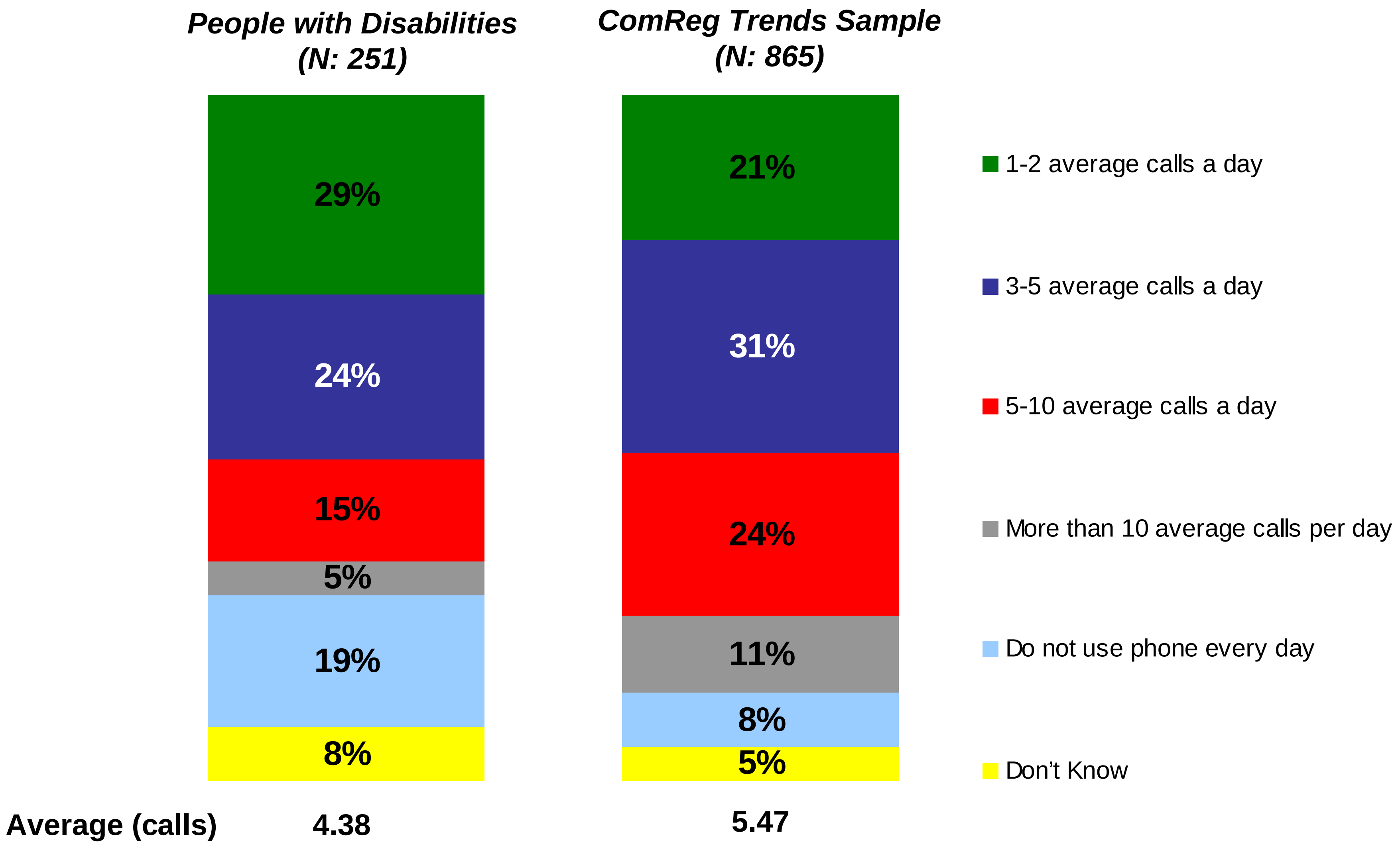
Among users with disabilities, usage patterns reflect those of the total population with regard to key demographic groups, e.g. younger respondents are much more likely to use mobile telephony than older respondents

Users with disabilities are also more likely than the overall population to use pre-paid credit to pay for their mobile phones (87%, compared to 73%)

Market share between mobile operators for users with disabilities reflects that of the overall population.

Do you have a mobile? N=394
Is your current mobile services one where you…?
Base: People with a disability who have a mobile N=251

Mobile users with disabilities tend to make fewer calls on average per day than the overall population



How many calls do you make on your mobile phone on an average day?
Base: Those who have a mobile

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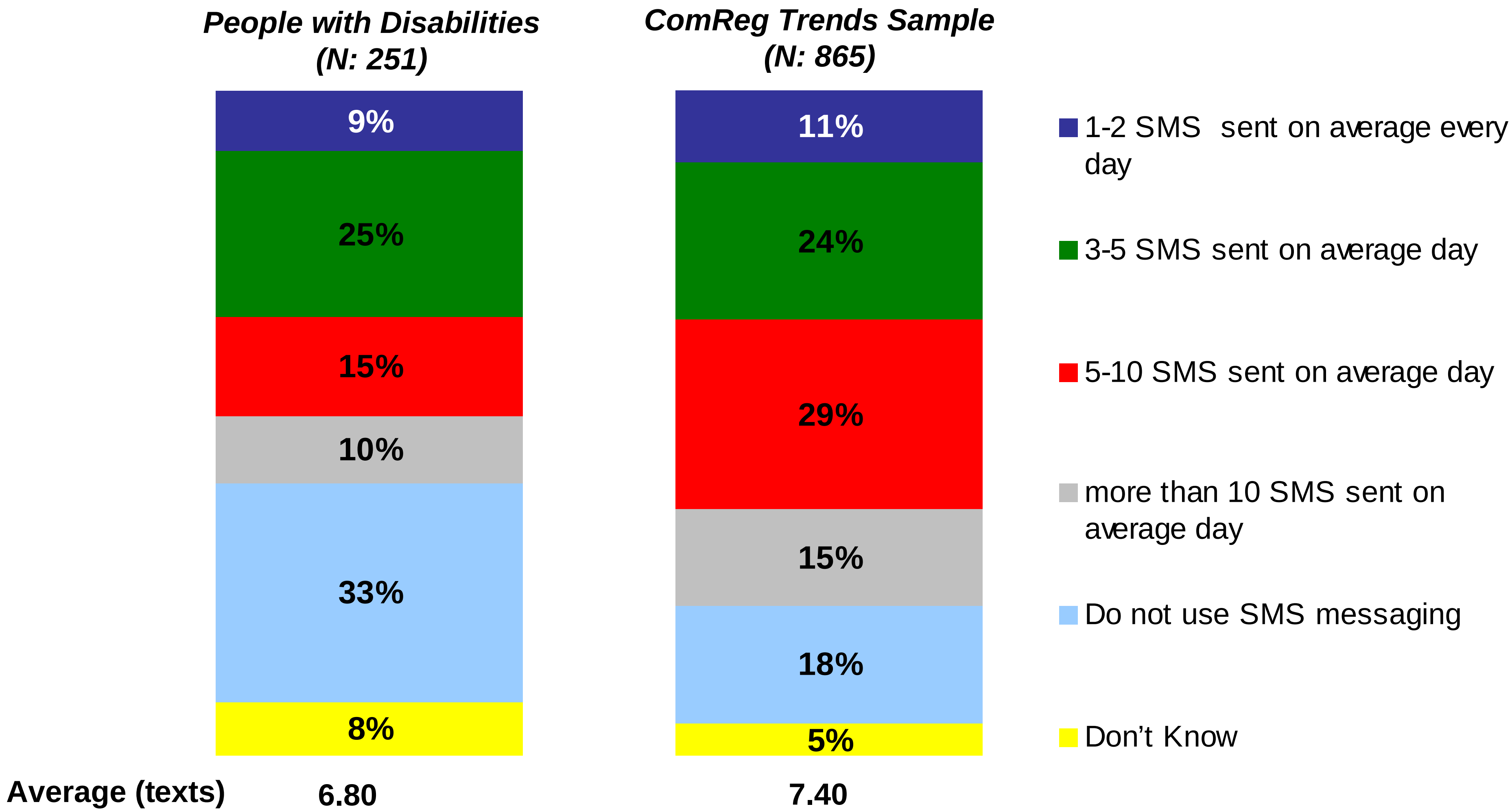
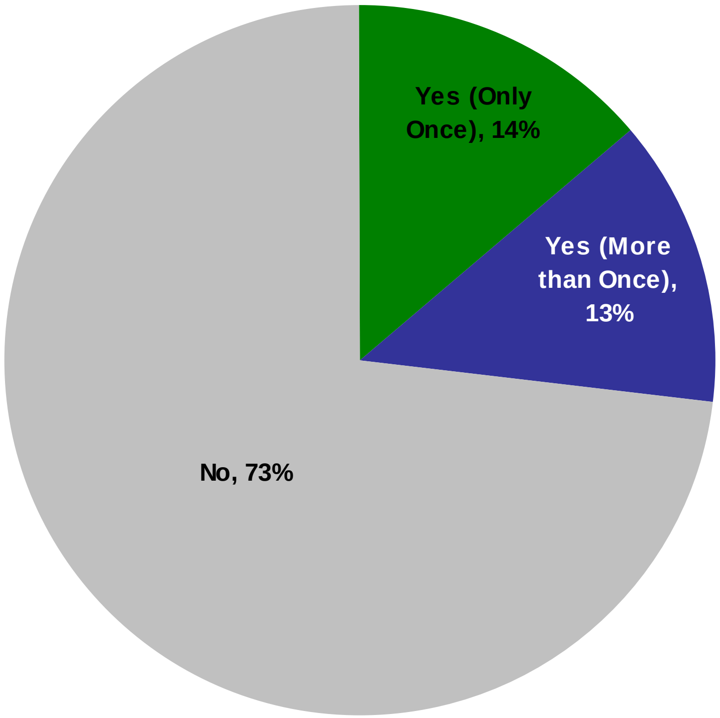
They also send fewer text messages than the overall population



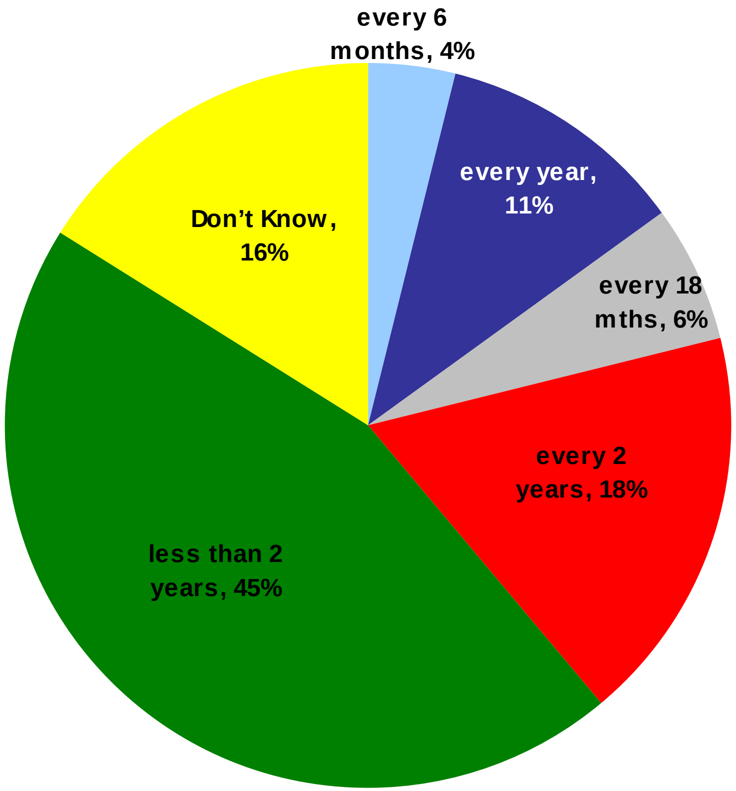
How many SMS messages do you send on your mobile phone on an average day?
Base: Those who have a mobile

Switching Handsets and Mobile Operators

•27% of mobile users with disabilities have shopped around to compare prices between mobile operators compared to 41% of the overall population.

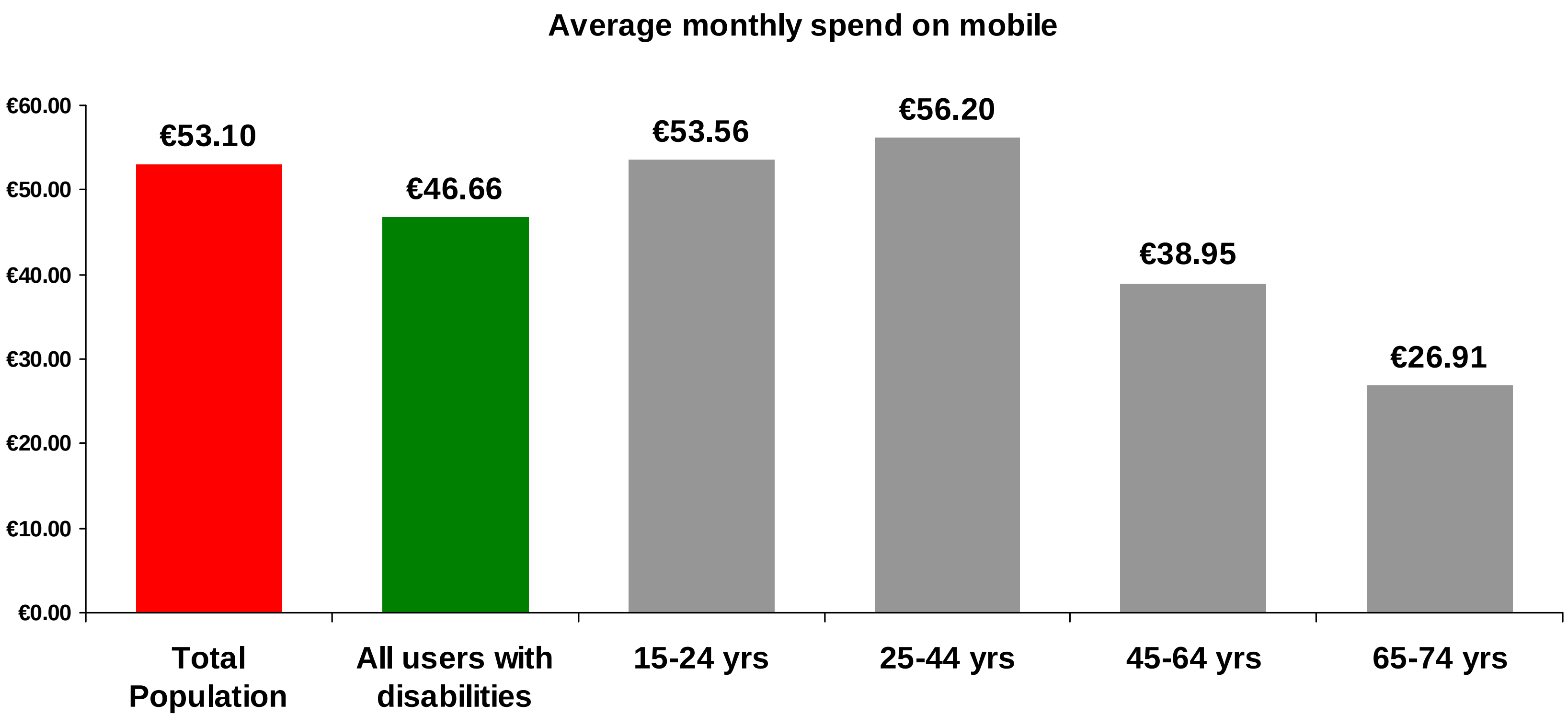


•Almost half of mobile subscribers with disabilities change their handset less than every two years.



Base: People with a disability who have a mobile N=251

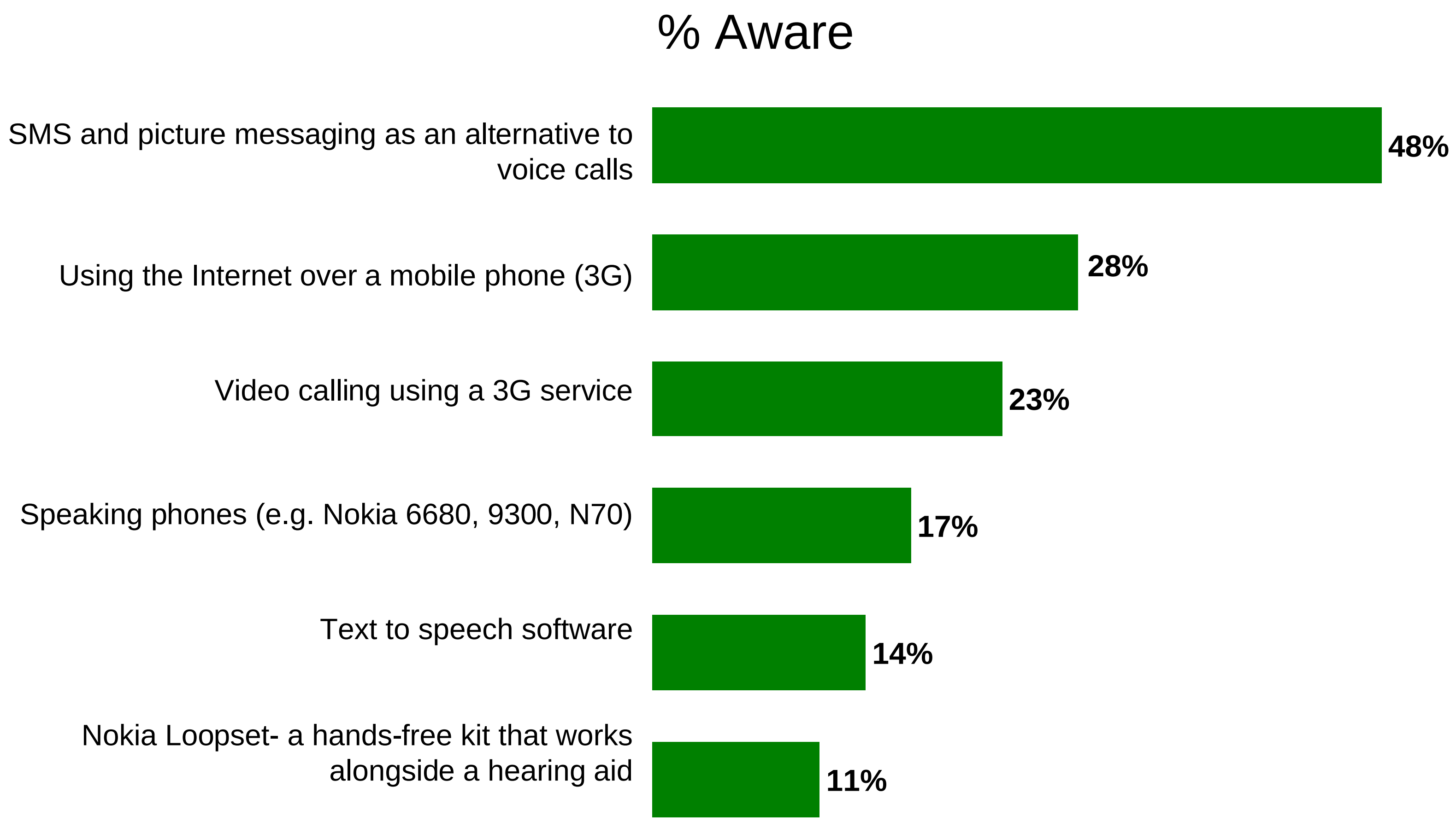
Monthly Mobile Spend is highest among 25-44 year olds



- People with a disability who are in the 25/44yr old age group spend more than average on their mobiles, at €56.20.
- Those who have a landline spend less (€42.86) than those without a landline (€52.39).
- Those with a vision or hearing impairment spend the least amount monthly at €41.11

How much did you spend last month on your mobile phone?
Base: People with a disability who have a mobile
N=251

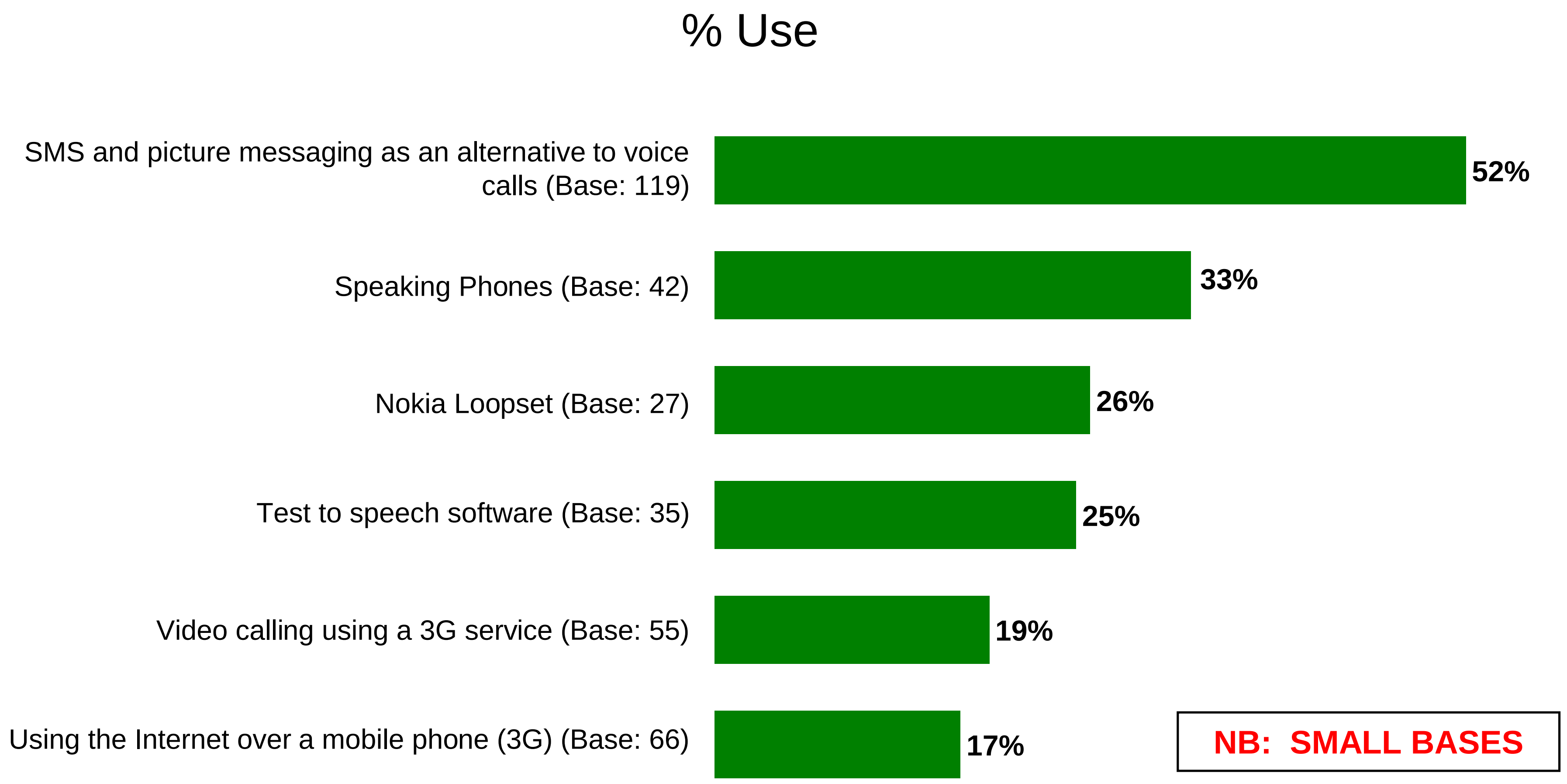
Awareness of services which enable easier use of mobile services for users with disabilities



Are you aware of the following mobile telephone services which are aimed at making mobile phone use more accessible to disabled users?

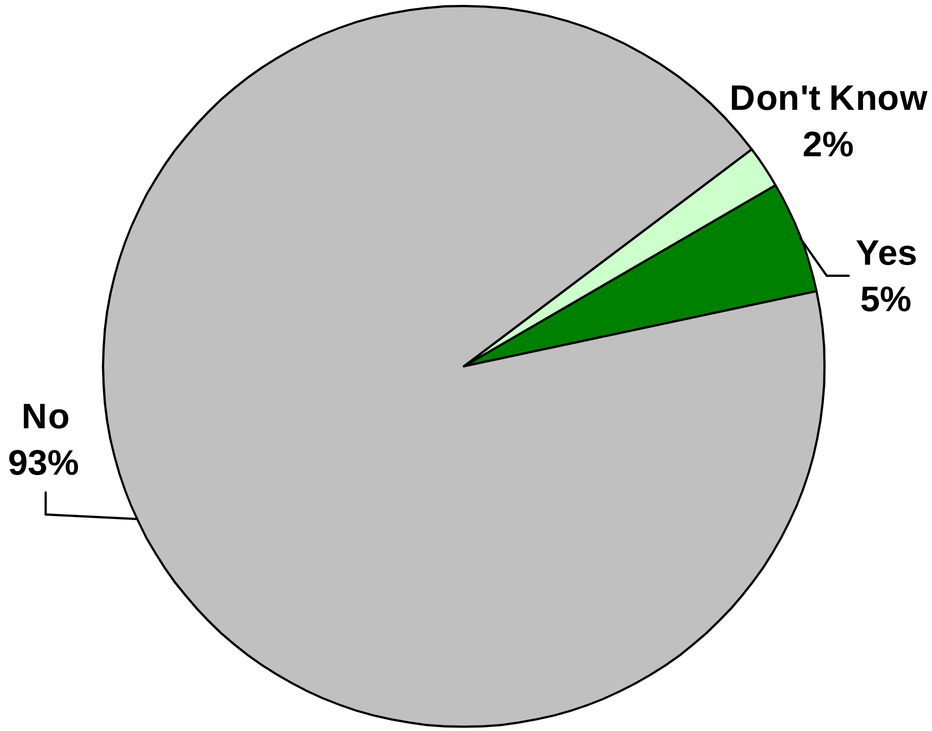
Base: People with a disability who have a mobile N=251

Usage of mobile phone services which may enable easier use of mobiles for users with disabilities



Do you use any of these services?

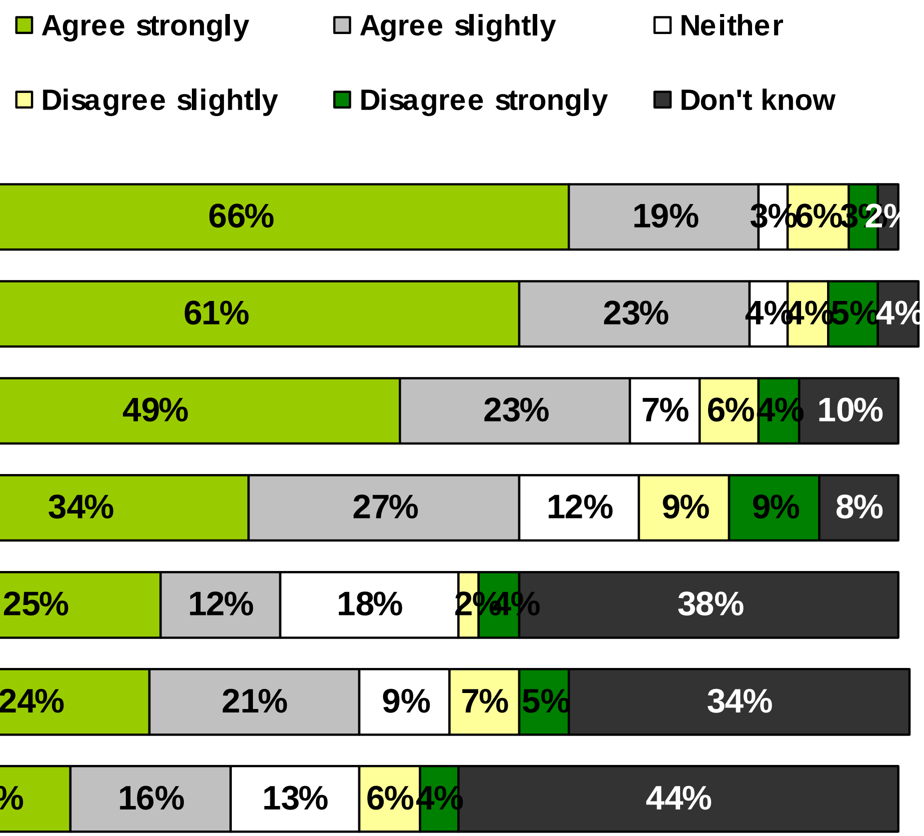
Only 5% of mobile users with disabilities have contacted their operator regarding special equipment or services which may make it easier to use a mobile phone



•Those with a vision or hearing impairment were twice as likely as those with other types of disability to have contacted their operator.

Have you ever approached your operator regarding special equipment or services which would make using your mobile phone service easier to use?
Base: People with a disability who have a mobile N=251

Agreement with statements regarding mobile phone service



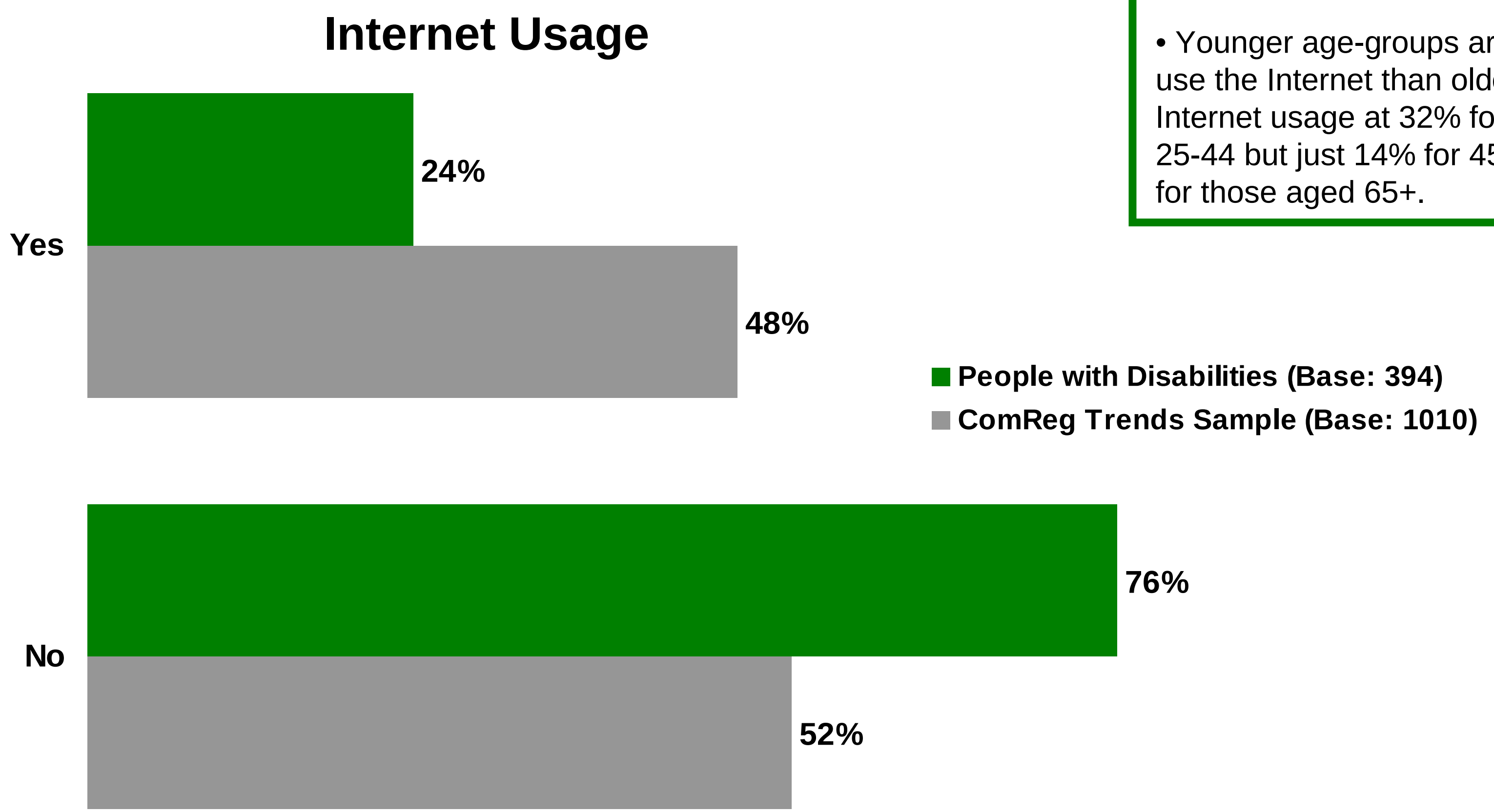
Please rate the following statements based on a scale of 1-5 where 1 means strongly disagree, and 5 means strongly agree.
Base: People with a disability who have a mobile N=251

Internet Usage

Summary of Findings – Internet and Technology

- Only 1 in 4 people with disabilities use the Internet, compared to almost half of the population in general. Younger age groups with disabilities are more likely to be Internet users than those in older age-groups.
- The most common location for using the Internet is the home, with work and school/college also popular locations. Cyber cafes are used by 1 in 20 people with a disability. There is very little difference between the disabled and overall populations with regards to their frequency and level of usage of the Internet.
- While there is little difference in terms of internet usage levels between people with disabilities and the overall population, people with disabilities are almost half as likely as the overall population to have home Internet access and are less likely to feel that they will get a home Internet connection in the future.
- Awareness of assistive technologies in relation to use of the Internet is relatively low, with less than 3 in 10 aware of all of these services.
- More than 7 in 10 people with disabilities believe that the Internet is of benefit to them in terms of accessing otherwise unavailable services, while 6 in 10 find the Internet easy to use. Relevant content, however, seems to be lacking, with just a third of people with disabilities agreeing that there is a wide range of content suitable for them to access on the Internet.
- When asked to rank telecommunications services in order of their importance in meeting communication needs, younger age groups placed more importance on mobile phones and Internet access, while older age groups ranked fixed line phones most highly.

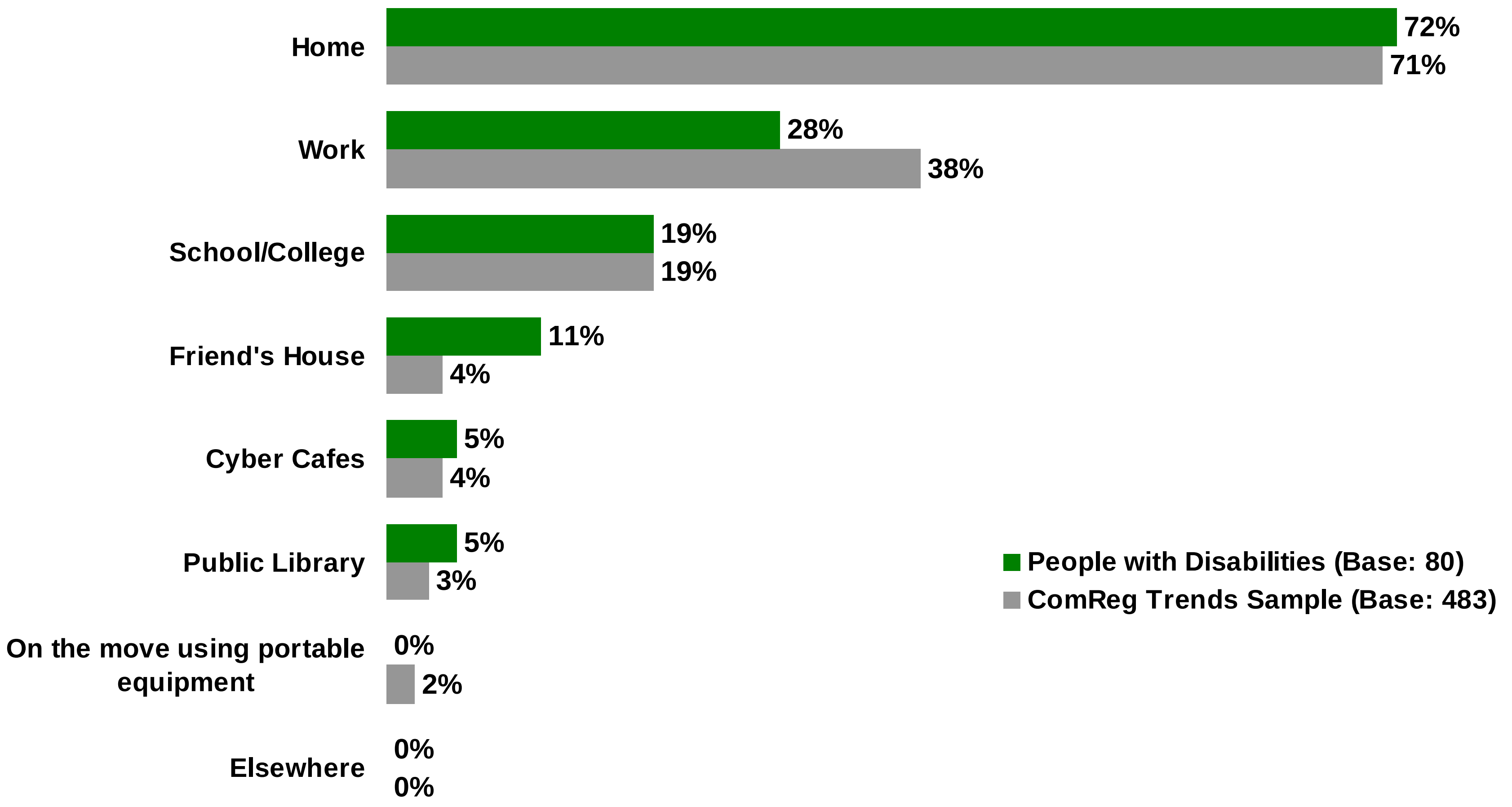
PC ownership and Internet Usage lower among users with disabilities



- 29% of people with disabilities have a PC, a laptop or both, compared with 46% of the non-disabled population.
- Younger age-groups are more likely to use the Internet than older groups, with Internet usage at 32% for those aged 25-44 but just 14% for 45-64s and 6% for those aged 65+.

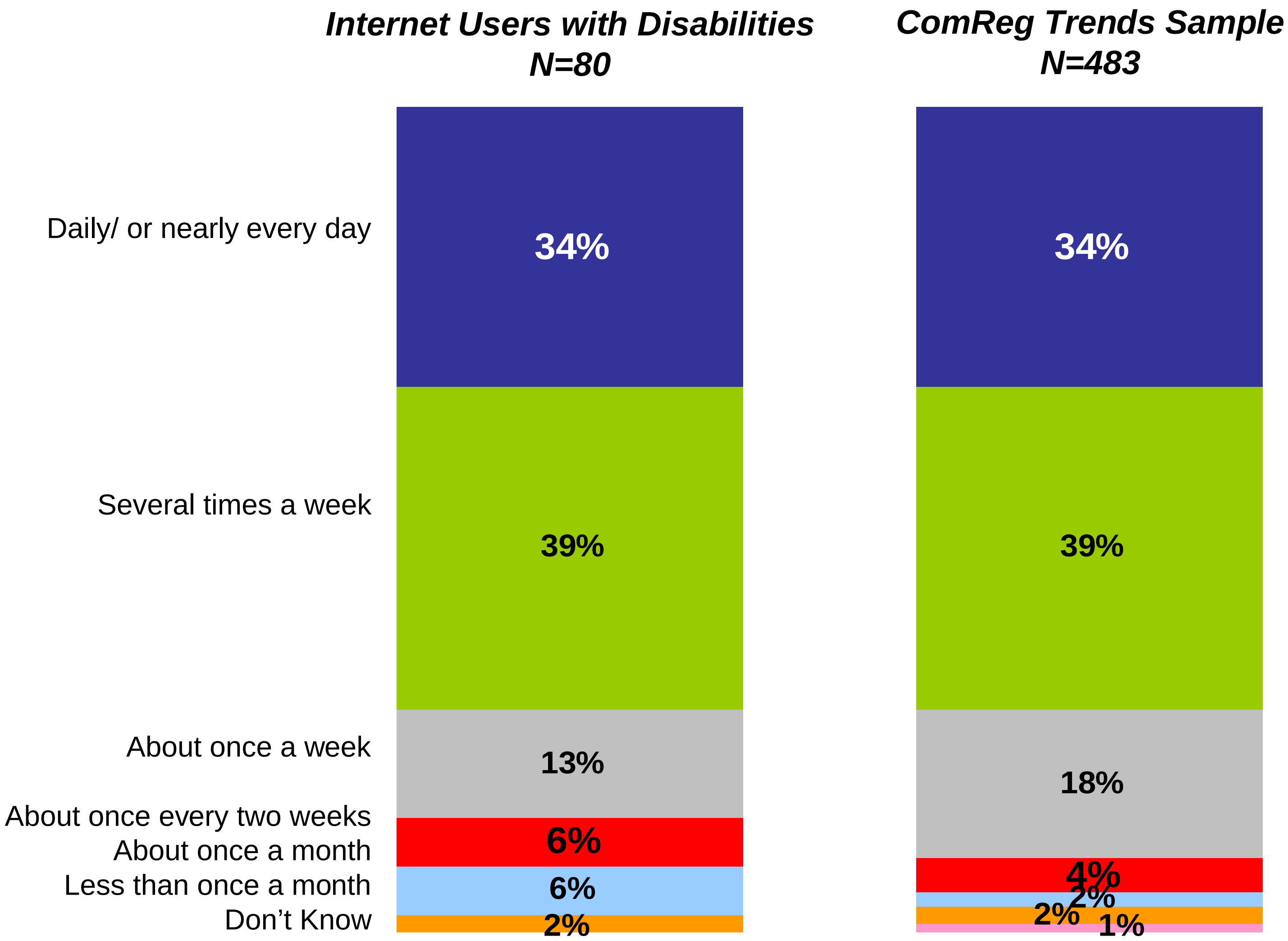
Do you personally use the internet from any location?

The home is the most popular location for Internet usage



From which of the following locations do you use the internet?
Base: Those who use the Internet

There is little difference between frequency of Internet usage among users with disabilities and the overall population.



How often do you use the Internet from any location?
Base: Those who use the Internet

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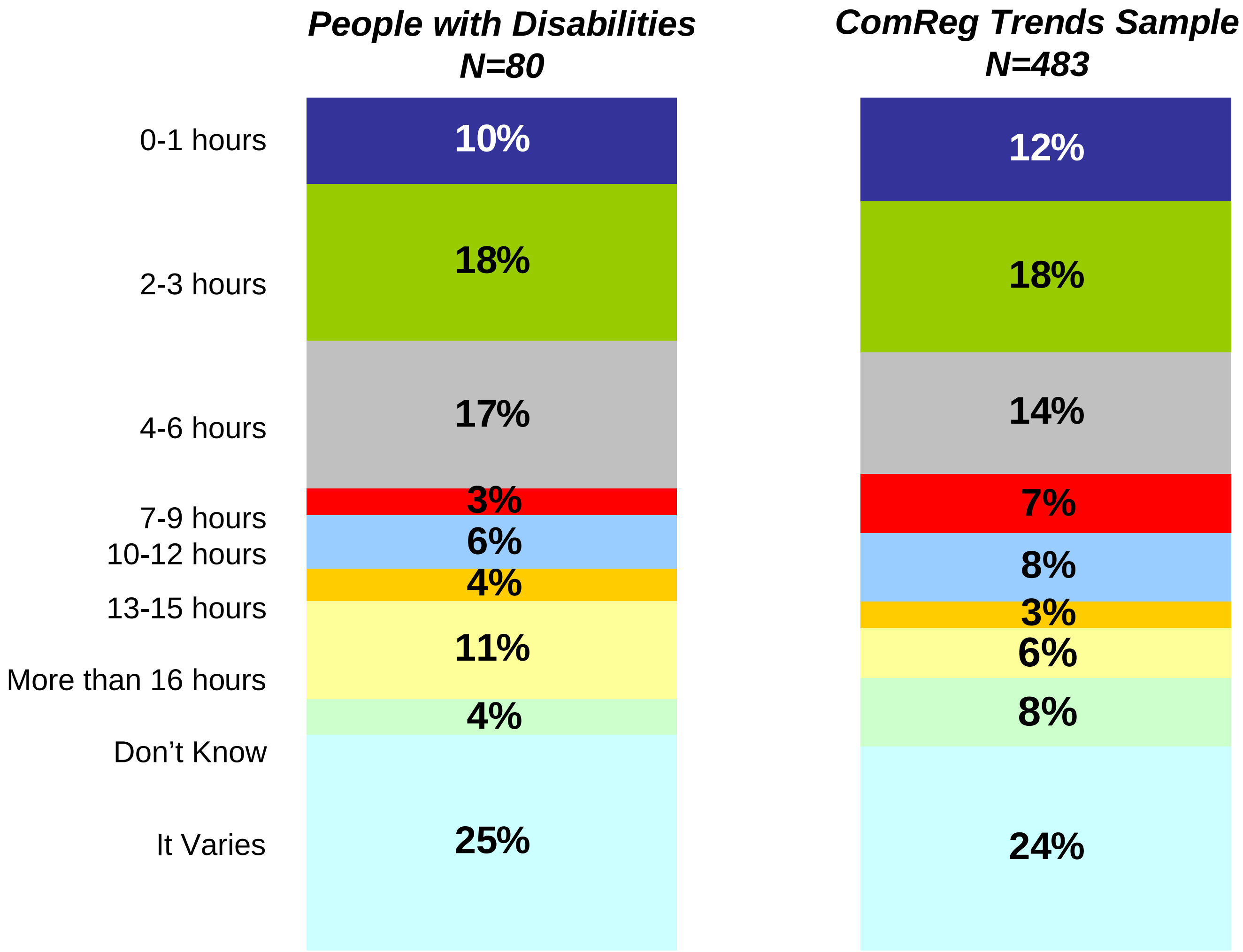
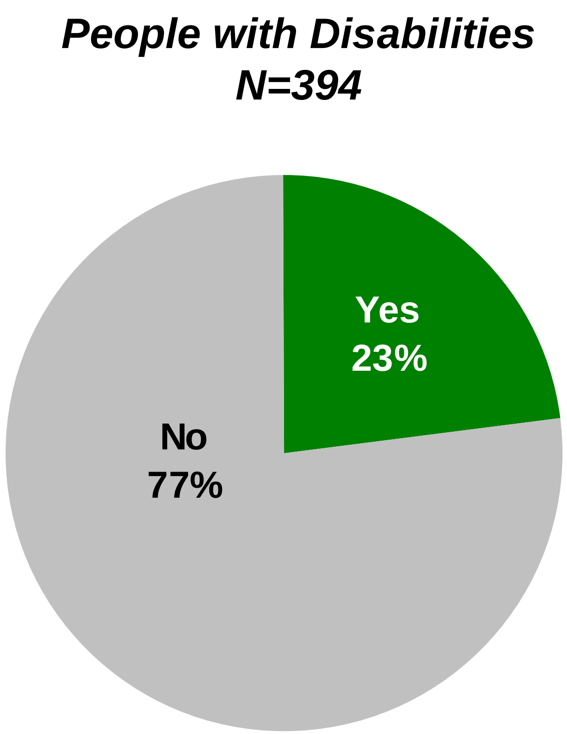
Internet users with Disabilities appear to use the Internet more each week than the overall population

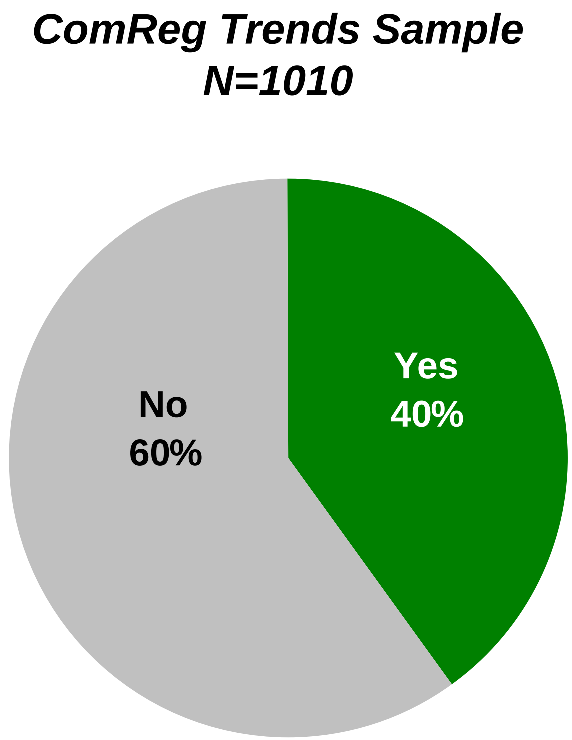


Average (hrs per week)	**8.13**	**7.00**

In an average week can you estimate how much time in hours you spend using the internet from any location?
Base: Those who use the Internet

Respondents with disabilities were less likely than the overall population to have an Internet connection in their home



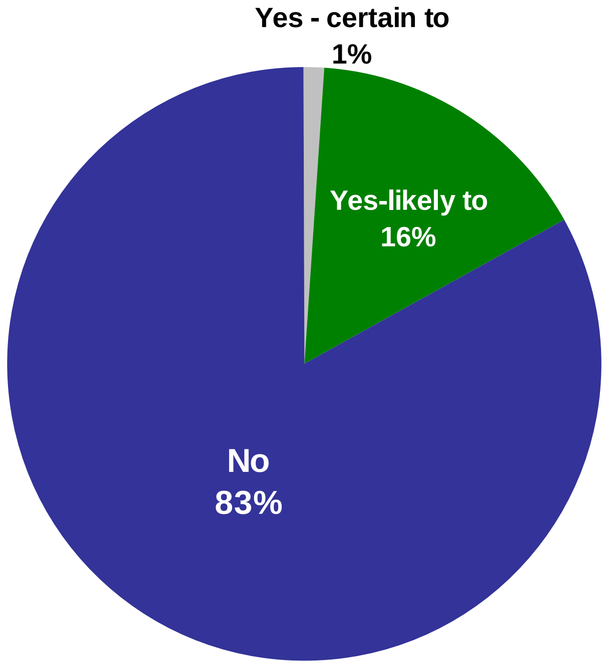


- People with disabilities who own their homes are almost three times as likely (27%) as those who rent (10%) to have home Internet connections. This disparity is not as marked among the non-disabled population, although owners are more likely (45%) than renters (27%) to have a home Internet connection.

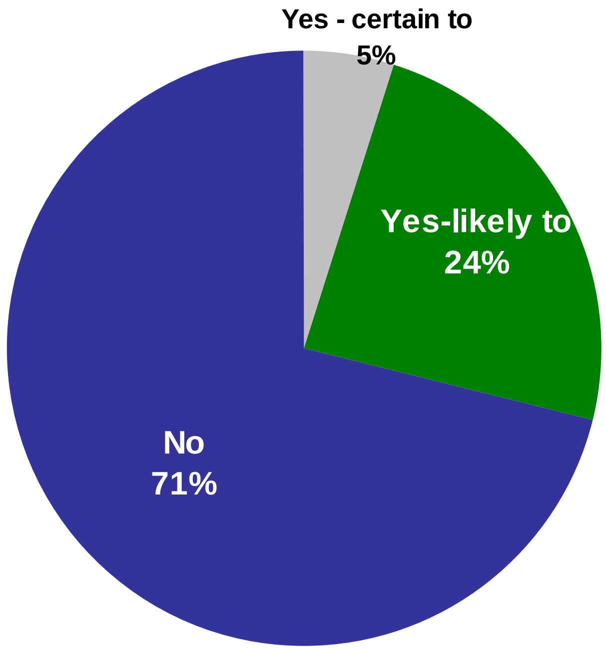
Do you have an internet connection in your home?

Intention to Subscribe to a Home Internet Connection in the Future

People with Disabilities
N=316



ComReg Trends Sample
N=606



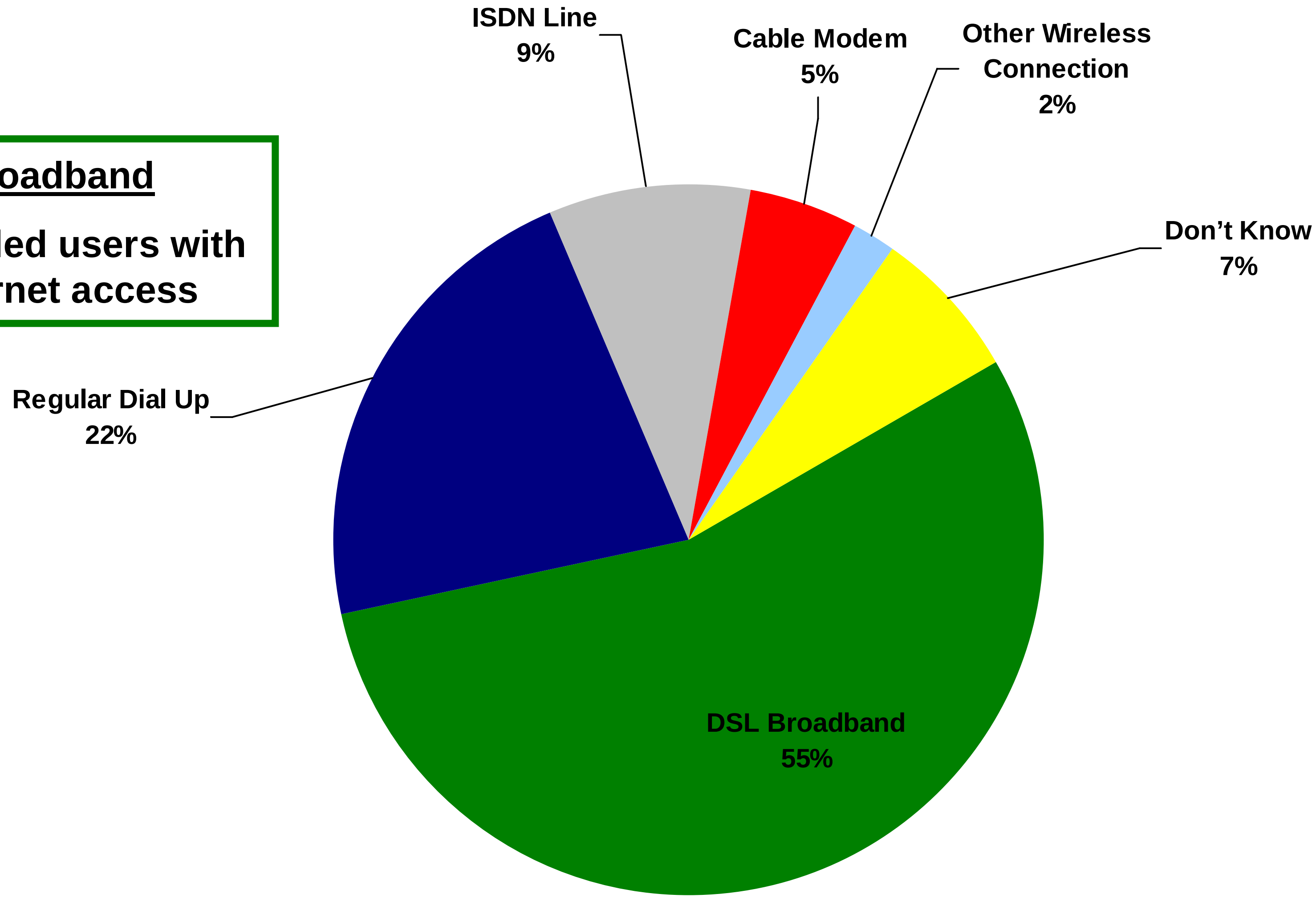
- The most common reasons for not getting an Internet connection among people with disabilities include lack of skills (50%), not having a PC at home (42%) and the cost (26%). These reasons are also the most cited among the overall population, mentioned by 36%, 40% and 23% respectively.

Do you intend to get the internet at home in the future?
Base: Those who do not have an Internet connection in their home

Means of connecting to the Internet from Home for internet users with disabilities

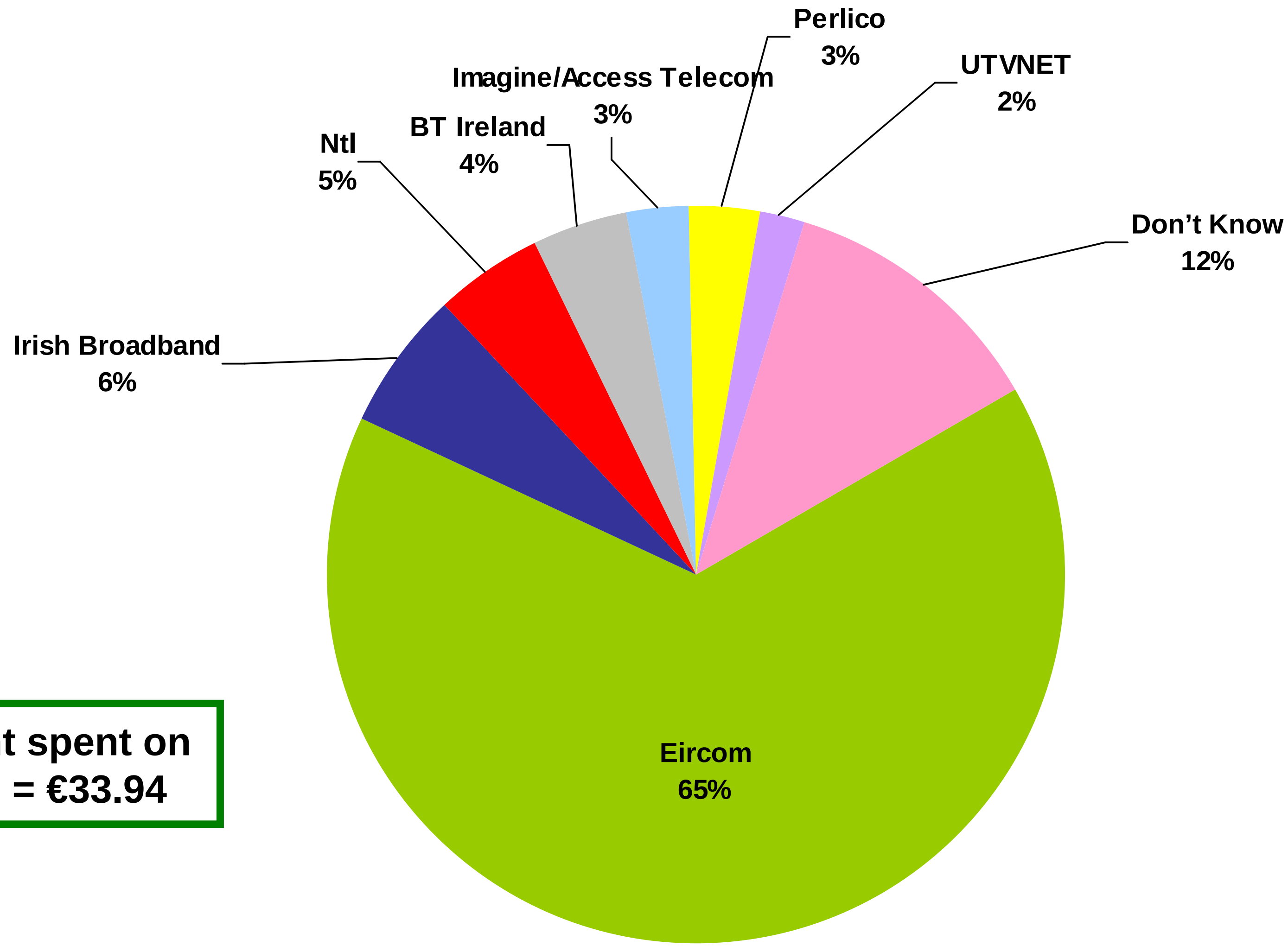
Total Broadband

62% of disabled users with home Internet access



How do you connect to the internet from home?
Base: People with a disability who have an Internet connection in their home N=78

Home Internet Service Provider for internet users with disabilities



Average amount spent on Internet service = €33.94

Who is your home Internet Service Provider (ISP)?
Base: People with a disability who have an Internet connection in their home N=78

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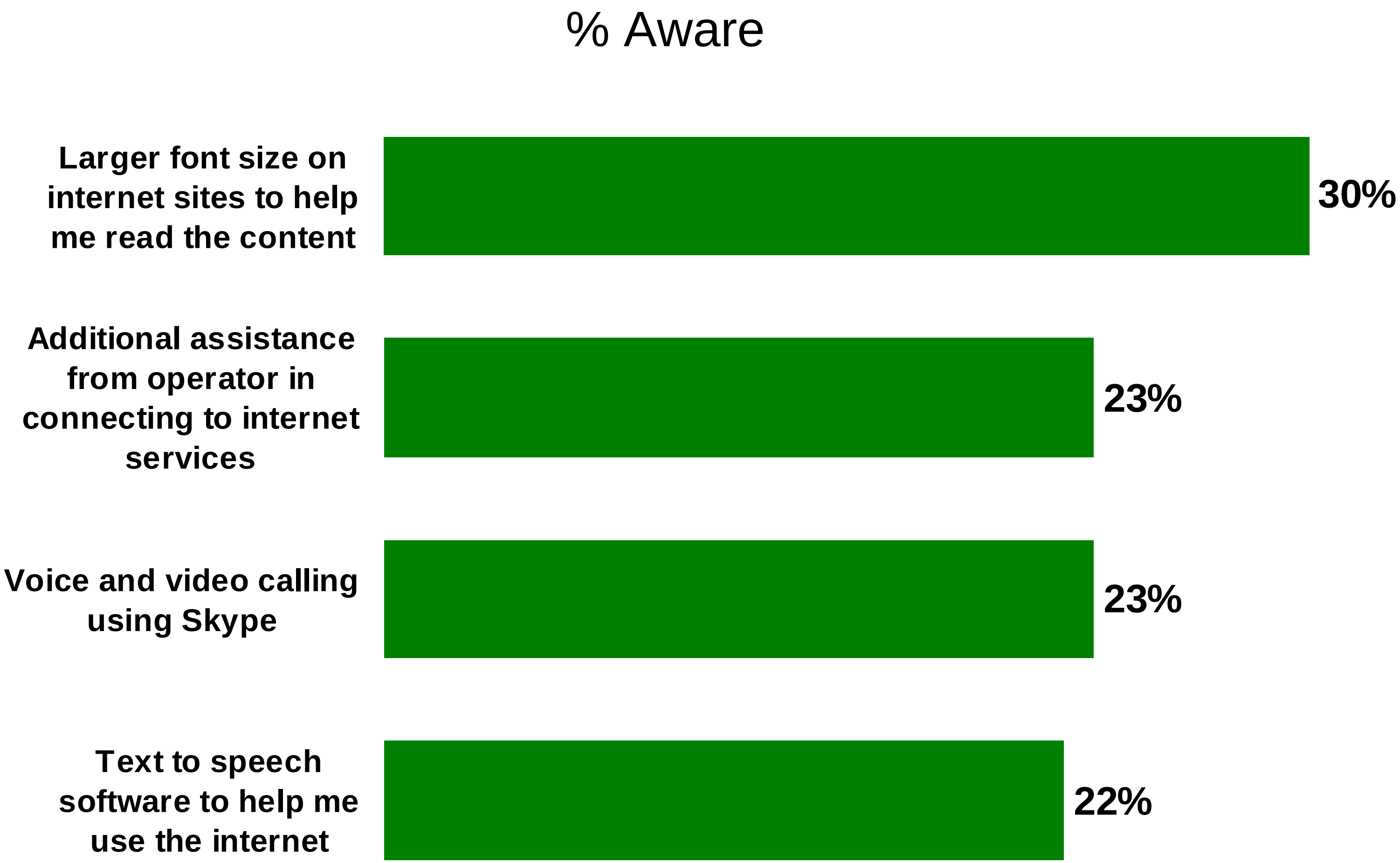
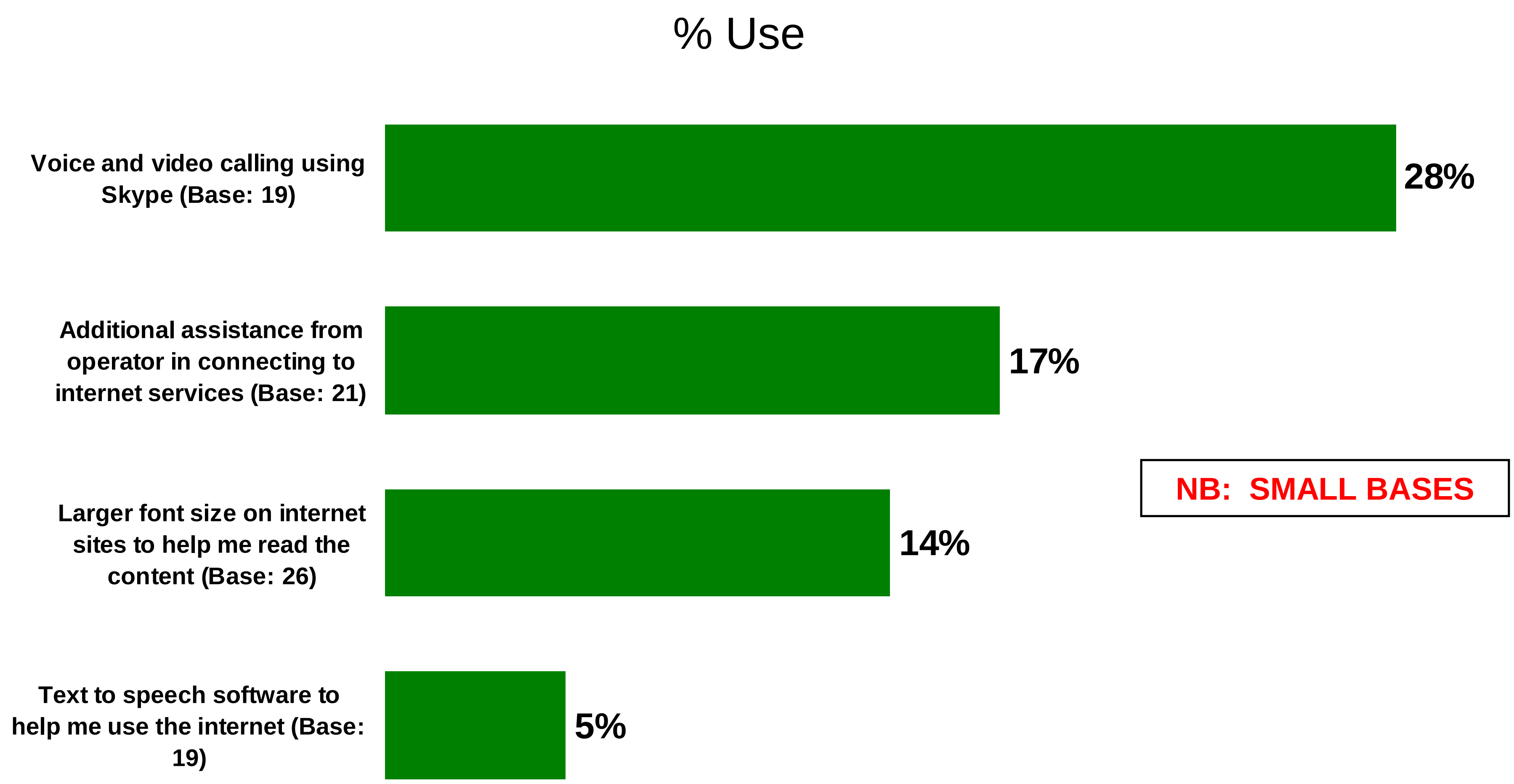
Awareness of Internet Services for People with Disabilities



Are you aware of the following Internet services which are aimed at making using the Internet more accessible to disabled users?

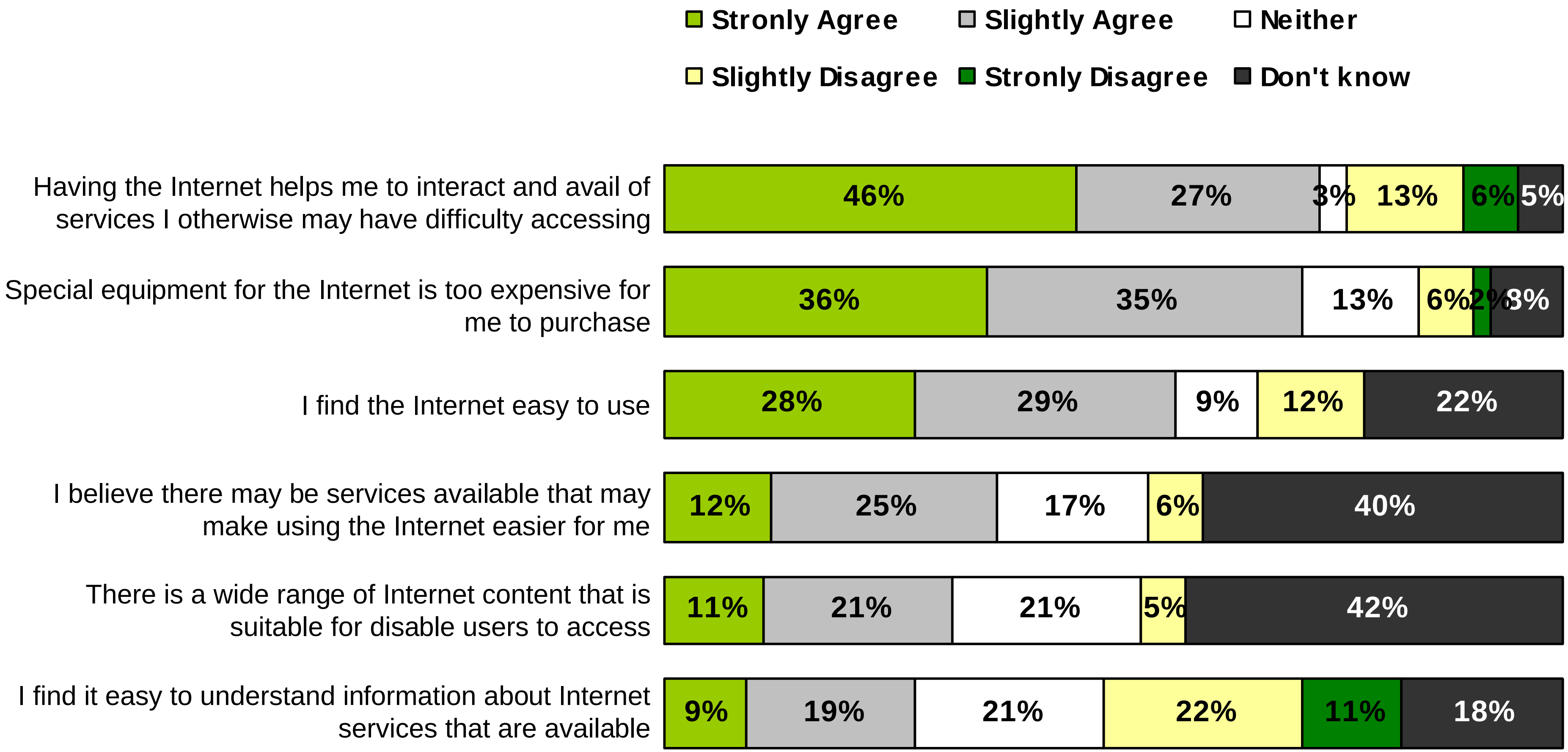
Base, People with disabilities who use the Internet N=80

Usage of Internet Services for People with Disabilities



Do you use any of these services?

Agreement with Statements regarding Internet Service



Please rate the following sentences based on a scale of 1-5 where 1 means strongly disagree, and 5 means strongly agree.
Base: People with a disability who use the Internet N=80

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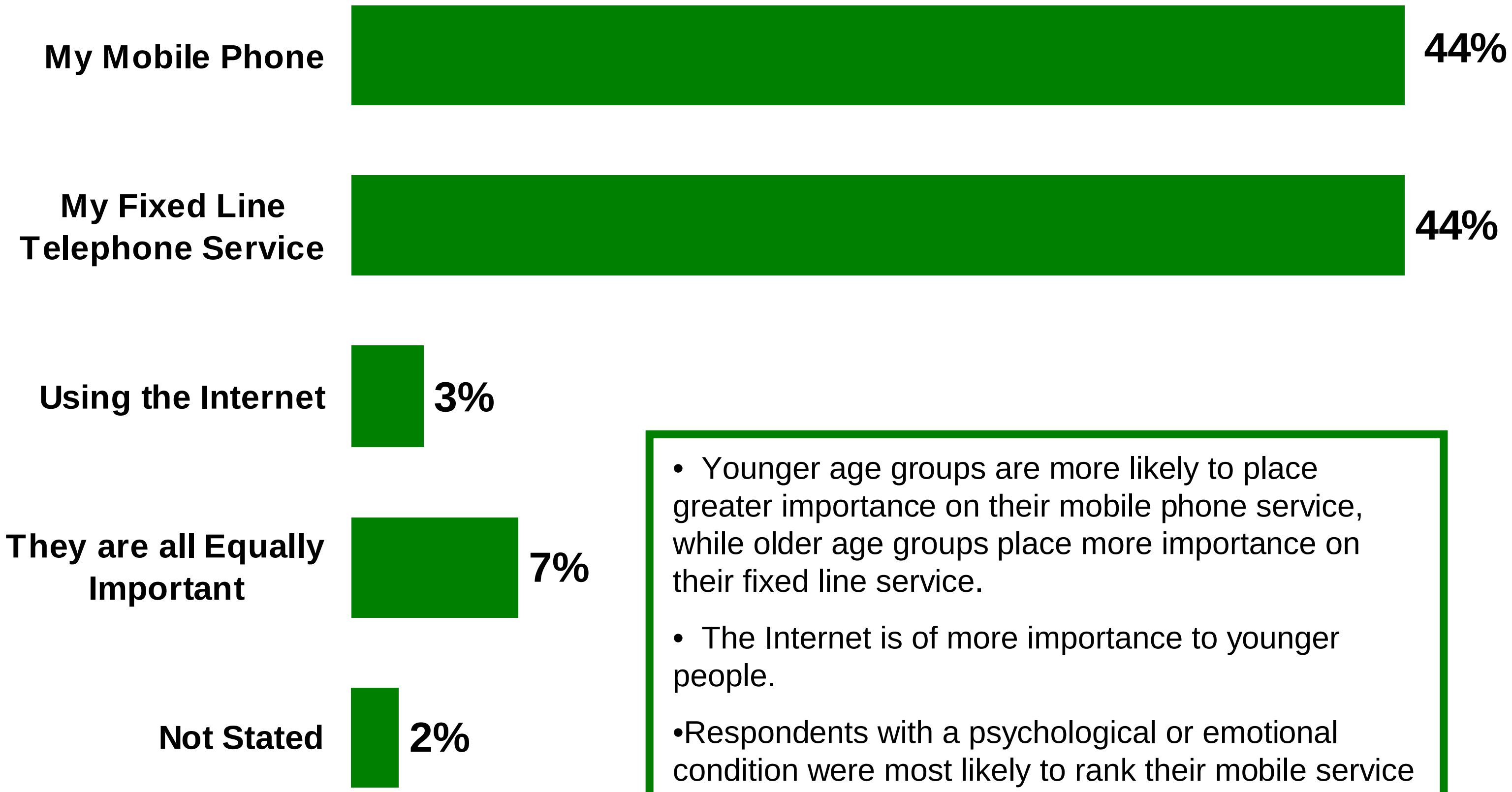
Technology in General

Most Important Service in meeting Communications Needs



- Younger age groups are more likely to place greater importance on their mobile phone service, while older age groups place more importance on their fixed line service.
- The Internet is of more importance to younger people.

•Respondents with a psychological or emotional condition were most likely to rank their mobile service highest.

Please rank the following sentences in order of their importance in meeting your communication needs, telling me… a) The most important? b) The second most important? c) And the third most important service? N=394

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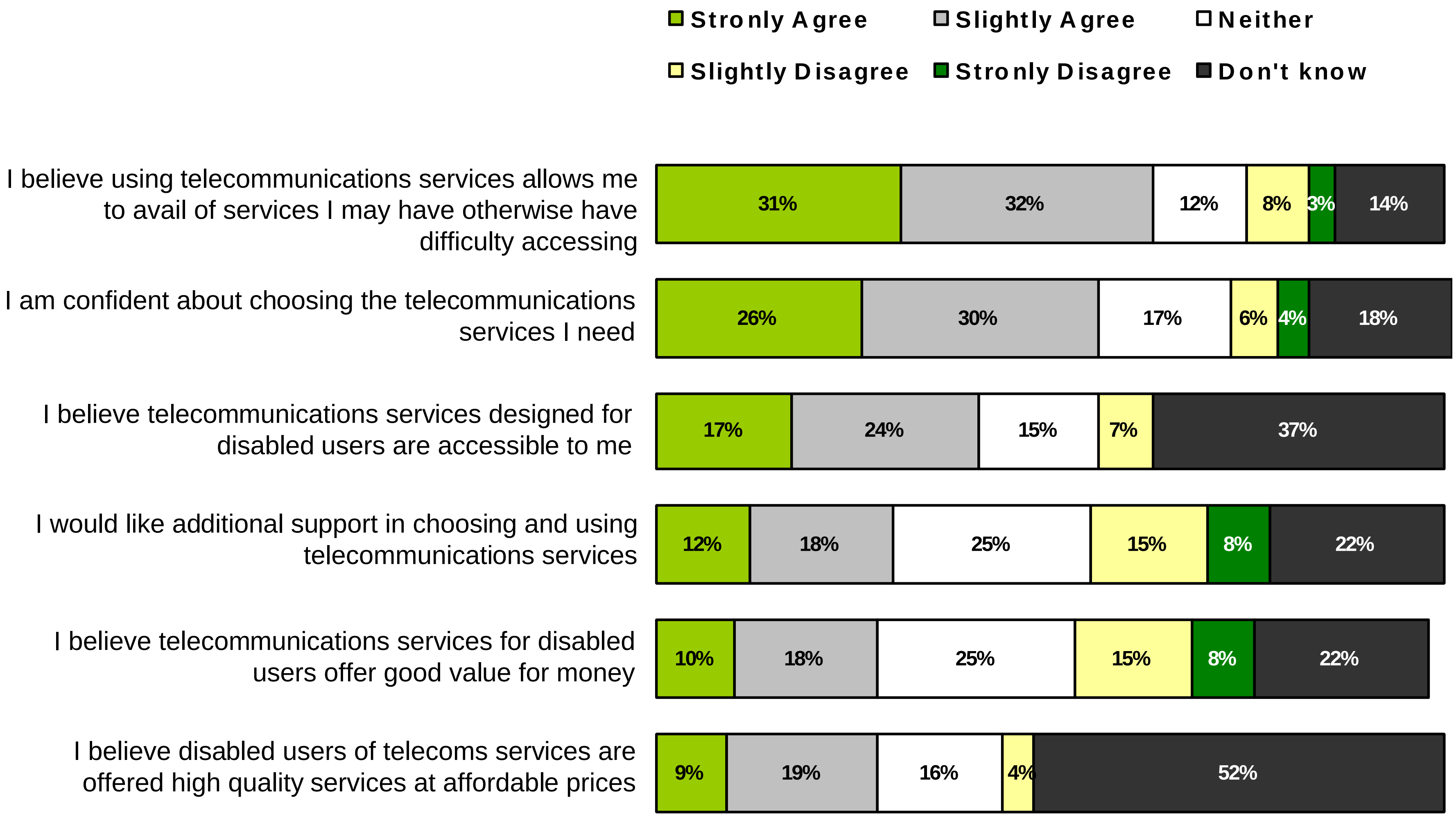
Agreement with Statements Regarding Telecoms



Please rate the following statements based on a scale of 1-5 where 1 means strongly disagree, and 5 means strongly agree. Base, N=394

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Appendix: Note on Methodology

Methodology

- 1,010 people surveyed aged 15–74 for the ComReg Trends, of which 44 were people with disabilities. Booster survey of 350 people with disabilities in the same age categories conducted to bring the total sample to 394.
- Findings weighted up to represent the full population of adults aged 15-74 in the Republic of Ireland based on the most recent findings from the CSO.
- Given a sample size of just over 1,000 there is a margin of error of +/-3%. On a sample size of 394, margin of error is +/-6%.
- Surveys were conducted face-to-face in respondents' own homes at over 100 different locations throughout the Republic.

Data Interpretation

- The table opposite shows the margin of error for a range of unweighted sample sizes
- If 20% of a total sample of 1,000 adults say they do something, you can be 95% certain that the figure for the population lies between 17% and 23% (i.e. there is a margin of error of 3%)
- As the sample size is reduced the margin of error increases
- To determine the margin of error on a particular section look at the unweighted sample size on each question i.e. the "n" (number of respondents to that question) at the base of each slide

Percentage of respondents who said…	1,000	500	100
10%	+/-2%	+/-3%	+/-6%
20%	+/-3%	+/-4%	+/-8%
25%	+/-3%	+/-4%	+/-8%
40%	+/-3%	+/-5%	+/-10%
50%	+/-4%	+/-5%	+/-10%
60%	+/-3%	+/-5%	+/-10%
75%	+/-3%	+/-4%	+/-8%
80%	+/-3%	+/-4%	+/-8%
90%	+/-2%	+/-3%	+/-6%

• If the "n" or number of respondents to a particular question falls below **75** the findings are in no way representative and should be only regarded as indicative and not overly analysed or interpreted