



MARKET EQUITY

The Power of Information™

Secondary Research to Determine the Size of the National Print Disabled Audience

May 2002

a report for



MARKET EQUITY:



Medium Employer of the Year 2000



Services Marketing Award 2000



Registered Priority Access Employer



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Organisation



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Executive Summary

Research Objective

RPH Australia and its members have little recent information regarding the size and profile of their target audience and the reach of its services amongst the target audience. Research has been commissioned to measure and profile the target audience nationally, as well as profile the audience by location and print disability type.

Approach

Secondary research was identified as the most efficient and accurate means of identifying the size and profile of the population of Australia with a print disability. Methodological concerns arise when considering conducting primary research with people with disabilities, and therefore publicly available data sources were considered the most appropriate for this project.

Summary of Findings

The following table provides the total number of people with a print disability in Australia, profiled by impairment type. This audience figure represents the total available audience Australia-wide, not considering actual access to radio services. The total of 3,304,639 Australians with a print disability represents almost 17.5% of the population (17.39%). 'The population' referred to in this document is 19,001,753 people. As the ABS 2001 Census figures are yet to be released, this figure has been worked out by multiplying the ABS 1996 Census population of 17,892,423 by the estimated five year growth rate of 6.2%. Not every individual who suffers any form of a print disability would acknowledge themselves as such, therefore may not necessarily identify RPH Australia members as a service provider relevant to their needs.



This total figure is recognised as a conservative estimate. As pre-existing data sources were not always available, estimates erring on the side of caution have been employed throughout the research.

Table A: Print Disabled Population of Australia by Impairment Type

	Vision	Physical	Literacy	Learning	Total
TOTAL	193,300	205,723	2,607,400	298,216	3,304,639

Accurate State/Territory profiles and country/metropolitan profiles have not been available for each impairment type due to the lack of disaggregation of available statistics. Table B represents the population with a print disability for each State and Territory as extrapolated from the total population figures and the total potential audience figure found in Table A.

Table B: Print Disabled Population of Australia by State/Territory

	% of Total Australian Population	Print Disabled TOTAL
New South Wales	34%	1,123,580
Victoria	24%	793,117
Queensland	19%	627,885
South Australia	8%	264,375
Northern Territory	1%	33,049
Australian Capital Territory	1%	33,049
Tasmania	3%	99,117
Western Australia	10%	330,467
TOTAL	100%	3,304,639



Table C represents the population with a print disability for each capital city in Australia as extrapolated from the total population figures for each capital city and the total potential audience figure.

Table C: Print Disabled Population of Australia by Capital City

	% of State Population in Capital City	Print Disabled in Capital City TOTAL
Sydney	62%	696,619
Melbourne	72%	571,044
Brisbane	44%	276,256
Adelaide	73%	192,993
Darwin	44%	14,451
Canberra	99%	32,718
Hobart	41%	40,637
Perth	72%	237,936
TOTAL	63%	2,062,654





Background and Objectives

The Department of Communications Review 1986 defined print disability as, “Australia’s print handicapped population consists of people who through age, disability or literacy problems are unable to physically handle books or newspapers or to read or comprehend written material”. RPH services around Australia provide a service to the population with a print disability via scheduled programming and broadcasting the BBC World Service overnight.

RPH services in Australia have little recent information regarding the size and profile of their target audience and the reach of their services amongst their target audience. Therefore, research has been commissioned to measure and profile the target audience nationally as well as profile the audience by location and print disability type.

Specifically, the aim is to profile the potential audience:

- ◆ nationally;
- ◆ by state;
- ◆ by country/metropolitan split; and
- ◆ by print disability type.

Research findings will be used to determine the scope of the potential audience to potential sponsors and Governments, to demonstrate the value of RPH programming. It is hoped that, if funding can be acquired, RPH Australia will conduct further research into the needs to the RPH audience with the aim of modifying service provision accordingly and therefore, better meet the needs of people with a print disability through RPH services.





The Approach

Secondary research, that is accessing pre-existing data sources, was identified as the most efficient and accurate means of identifying the size and profile of the population of Australia with a print disability. Methodological concerns arise when considering conducting primary research with people with disabilities and therefore, publicly available data sources were considered the most appropriate for this project.

The following is the list of sources consulted in gathering the findings.

Literacy Impairment	Vision Impairment	Learning/ Attention Impairment	Physical Impairment	Other
Adult Literacy Council Australia	Association for the Blind WA	Dyslexia-Speld Foundation WA	Arthritis Foundation WA, NSW, SA, QLD, VIC, TAS, ACT, NT	Australian Bureau of Statistics
Department of Immigration and Ethnic Affairs	Royal Blind Society of NSW	Speld VIC, NSW, QLD, SA, TAS	Paraplegic – Quadriplegic Association WA, NSW, VIC, QLD, TAS, SA, NT, ACT	Disability Services Commission and other respective State bodies
	QLD Blind Association	Learning and Attention Disorder Society Australia	Multiple Sclerosis Society of NSW, WA, VIC, QLD, SA, TAS	Aged Council of Australia
	Royal Institute for the Blind SA		Cerebral Palsy Association WA, NSW, VIC, QLD, TAS, SA, NT, ACT	Federal Department of Family and Community Services
	Royal VIC Institute for the Blind			ACROD
	Lion's Eye Institute			ACOSS
	Centre for Eye Research Australia			Office of Disability
	Eye Health Promotion Unit			Office of Older Australians
	Vision Australia Foundation			National Information and Library Service
	Vision 2020 Australia			Round Table on Disability
	Hear a Book Service			
	Blind Citizens Australia			



Recognising Potential Limitations of Research Approach *The Power of Information™*

Limitations of this research approach arise when the available information is limited. Specifically for ill funded disability related organisations, keeping accurate statistics is often an unrealistic task. In most instances, only member numbers are kept which are not an accurate representation of the actual number of sufferers. As such, extrapolation of available data and estimations have been used in places. These instances are all clearly identified in the body of the report.

The State/Territory and country/metropolitan profiles specified in the objectives of the project have been, in some cases, impossible to determine as a result of the lack of disaggregated statistics held by both Federal and State government agencies and representative associations consulted.

The secondary research approach applied to this project has consulted a wide variety of independent sources in gaining the relevant information. There has been no way to determine whether people with multiple print disabilities, for example those who are blind and have arthritis, have been counted twice. In an effort to avoid this duplication, some areas of disability have been deliberately omitted. For example, the aged have not been counted as the aged with a print disability would probably have been accounted for in the arthritis and other print disability type categories.

A third limitation encountered in the research process has been conflicting statistics. In these instances, the integrity of the source has been investigated as much as possible, and a decision made on these findings.





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Detailed Findings





Total Potential Audience

The following table provides the number of people with a print disability in Australia, profiled by impairment type. Exact State/Territory profiles and country/metropolitan profiles have not been available due to the lack of disaggregation of available statistics. The total of 3,304,639 Australians with a print disability represents almost 17.5% of the population (17.39%). Of course, not everybody who may have any form of a print disability would acknowledge themselves as such, therefore they may not necessarily identify RPH Australia members as a service provider relevant to their needs.

The figure representing the total Australian population with a print disability is a conservative estimate. Throughout the secondary research process, a lack of data was encountered. In these instances, conservative estimates based on consultation with relevant organisations have been employed in deriving the total figure.

Table 1: Print Disabled Population of Australia by Impairment Type

	Vision	Physical	Literacy	Learning	Total
TOTAL	193,300	205,723	2,607,400	298,216	3,304,639

Accurate State/Territory profiles and country/metropolitan profiles have not been available for each impairment type due to the lack of disaggregation of available statistics. Table 2 represents the population for each State and Territory with a print disability as extrapolated from the total population figures and the total potential audience figure found in Table 1.

Table 2: Print Disabled Population of Australia by State/Territory

	% of Total Australian Population	Print Disabled TOTAL
New South Wales	34%	1,123,580
Victoria	24%	793,117
Queensland	19%	627,885
South Australia	8%	264,375
Northern Territory	1%	33,049
Australian Capital Territory	1%	33,049
Tasmania	3%	99,117
Western Australia	10%	330,467
TOTAL	100%	3,304,639



Table 3 represents the population with a print disability for each capital city in Australia as extrapolated from the total population figures for each capital city and the total potential audience figure.

Table 3: Print Disabled Population of Australia by Capital City

	% of State Population in Capital City	Print Disabled in Capital City TOTAL
Sydney	62%	696,619
Melbourne	72%	571,044
Brisbane	44%	276,256
Adelaide	73%	192,993
Darwin	44%	14,451
Canberra	99%	32,718
Hobart	41%	40,637
Perth	72%	237,936
TOTAL	63%	2,062,654

The challenge for RPH Australia members now is to raise awareness of their service amongst the population with a print disability. Through the course of conducting the research, awareness of the RPH service around Australia was low even amongst representative associations for people of which the services would directly cater. Potentially, partnerships with such organisations could serve to greatly increase awareness amongst the target audience.

In thinking about possible future communications plans to target potential audience members, this breakdown is very useful. Dissemination of promotional information through representative organisations, government service providers and private service providers will all help to steer communications and any future research. Those with an identified learning or literacy impairment will be more difficult to target, as these conditions may go unnoticed by people with these impairments.





Literacy Impairment

Literacy figures provided are for people aged between 15 and 74 years. This range has been pre-determined by the ABS in their data collection. Child literacy figures are available, although it has been presumed that children under the age of 15 are not RPH Australia's primary target audience.

Overall

The 1996 ABS Survey objectively assess three types of literacy:¹

Prose literacy

Prose literacy is the ability to understand and use information from various kinds of prose texts, including texts from newspapers, magazines and brochures.

Document literacy

Document literacy is the ability to locate and use information contained in materials such as tables, schedules, charts, graphs and maps.

Quantitative literacy

Quantitative literacy is the ability to perform arithmetic operations using numbers contained in printed texts or documents. This type of literacy clearly has a strong element of numeracy. However, because quantitative literacy relates to the ability to extract and use numbers from printed texts and documents, for the purposes of the Survey of Aspects of Literacy and this publication, it is referred to as a type of literacy.

In addition, the Survey determined five skill levels of literacy:

Level 1

People at this level have very poor skills, and could be expected to experience considerable difficulties in using many of the printed materials that may be encountered in daily life. Some people at this level display the ability to locate a single piece of information in a relatively short piece of text, to enter a piece of information onto a document, or to perform simple arithmetic operations using numbers provided. However, Level 1 also includes those who could not successfully complete such tasks.

¹ Australian Bureau of Statistics, *Aspects of Literacy*, 1996.



Level 2

People at this level could be expected to experience some difficulties in using many of the printed materials encountered in daily life. While they would be able to use some printed material, this would generally be relatively simple, short and clearly structured, or require simple arithmetic operations to be performed on numbers that are easily determined from the source text.

Level 3

This level represents the ability to cope with a varied range of material found in daily life and at work. People at this level would not be able to use all printed material with a high level of proficiency, but they would demonstrate the ability to use longer, more complex printed material. They would be able to take conditional information into account, to make inferences, to compare and contrast information, and to extract numbers embedded in complex displays and perform more varied arithmetic operations.

Level 4

People at this level have good literacy skills, and display the ability to use higher order skills associated with matching and integration of information, with making higher order inferences and with performing arithmetic operations where either the quantities or the operation to be performed are not easily determined.

Level 5

People at this level have very good literacy skills, and can make high-level inferences, use complex displays of information, process conditional information and perform multiple operations sequentially.

After consultation with the ABS, it has been determined that those who possess a skill of Level 1, Prose Literacy would experience considerable difficulty in reading the newspaper daily and therefore have a print disability. A total of 19.7% of the Australian population aged between 15 and 74 years in 1996 or 2,607,400 people are considered to have a print disability through a literacy impairment.

However, the figure of 19.7% only illustrates illiteracy amongst those aged 15 to 74 years. This figure as a proportion of the entire population of any age, is 14.6%.



Table 4: Number and Proportion at Each Skill Level

Skill Level	Prose Scale		Document Scale		Quantitative Scale	
	'000	%	'000	%	'000	%
Level 1	2,607.4	19.7	2,580.3	19.5	2,531.8	19.2
Level 2	3,631.9	27.5	3,738.3	28.3	3,590.8	27.2
Level 3	4,668.9	35.3	4,774.2	36.1	4,764.0	36
Level 4	2,052.7	15.5	1,880.8	14.2	2,011.9	15.2
Level 5	259.9	2	247.2	1.9	322.3	2.4
Total	13,200.8	100	200.8	100	13,200.8	100

People classified as illiterate according to the above ratings of Level 1, Prose Literacy tended to:

- ◆ have a lower education attainment;
- ◆ be in the older demographic of 65-74;
- ◆ be male; and
- ◆ be indigenous.

State Profile

The ABS statistics quoted above did not contain statistics disaggregated by State and Territory.

Specific Literacy Impairment Type

The most reliable literacy statistics available are quoted above. As these statistics are an overall measure it would risk extreme duplication of figures (see Limitations of Research Approach, page 6) to profile specific literacy impairment types, such as immigrants unable to read English. However, the immigrant potential audience is significant, as 14% of the Australian population speak English as a second language.²



² ABS, *Census 1996*.



Vision Impairment

Overall

The ABS reports 316,200 in Australia have total vision loss or partial vision loss that remains uncorrected.³ A total of 115,900 are under the age of 65 and 200,300 are aged 65 years or over. Upon consultation with the ABS, it has been determined that those with total or partial uncorrected sight loss who suffer a profound, severe or moderate core activity restriction would effectively have a print disability. Therefore, a total of 193,300 Australians suffer a print disability due to sight impairment. This figure represents just over 1% of the population.

Table 5: Sight Restriction by Disability Status

	No sight loss/sight corrected '000	Partial loss of sight /Total loss of Sight '000	Total '000
0 – 64 years			
Core Activity Restriction			
Profound	198.3	19.8	218.1
Severe	422.1	14.6	436.6
Moderate	419.3	14.5	433.8
Mild	601.6	30.6	632.1
Schooling or employment restriction	1,585.9	74.4	1,660.4
All with specific restrictions (c)	1,956.0	92.7	2,048.7
Total	2,269.2	115.9	2,385.1
65 years and over			
Core Activity Restriction			
Profound	229.5	90.1	319.6
Severe	129.7	31.9	161.6
Moderate	204.0	22.4	226.4
Mild	354.0	45.6	399.6
Schooling or employment restriction	-	-	-
All with specific restrictions (c)	917.3	190.0	1,107.2
Total	1,025.0	200.3	1,225.2
Total			
Core Activity Restriction			
Profound	427.8	109.9	537.7
Severe	551.8	46.5	598.2
Moderate	623.3	36.9	660.3
Mild	955.7	76.2	1,031.8
Schooling or employment restriction	1,585.9	74.4	1,660.4
All with specific restrictions (c)	2,873.3	282.7	3,155.9
Total	3,294.1	316.2	3,610.3

³ ABS, *Disability, Ageing and Carers: Disability and Long Term Conditions*, 1998.



State Profile

The ABS statistics quoted above did not contain statistics disaggregated by State and Territory.

Vision Impairment Type

The Centre for Eye Research Australia conducted research with Australians over the age of forty to determine causes of sight loss. A total of 5,147 respondents were consulted and the results extrapolated to the entire Australian population. The figures below display the particular types of vision impairment suffered for two differing levels of vision impairment. Figure 1 displays the causes of vision impairment amongst those with less than driving vision. Figure 2 shows the same results for those with legal blindness.

Figure 1:

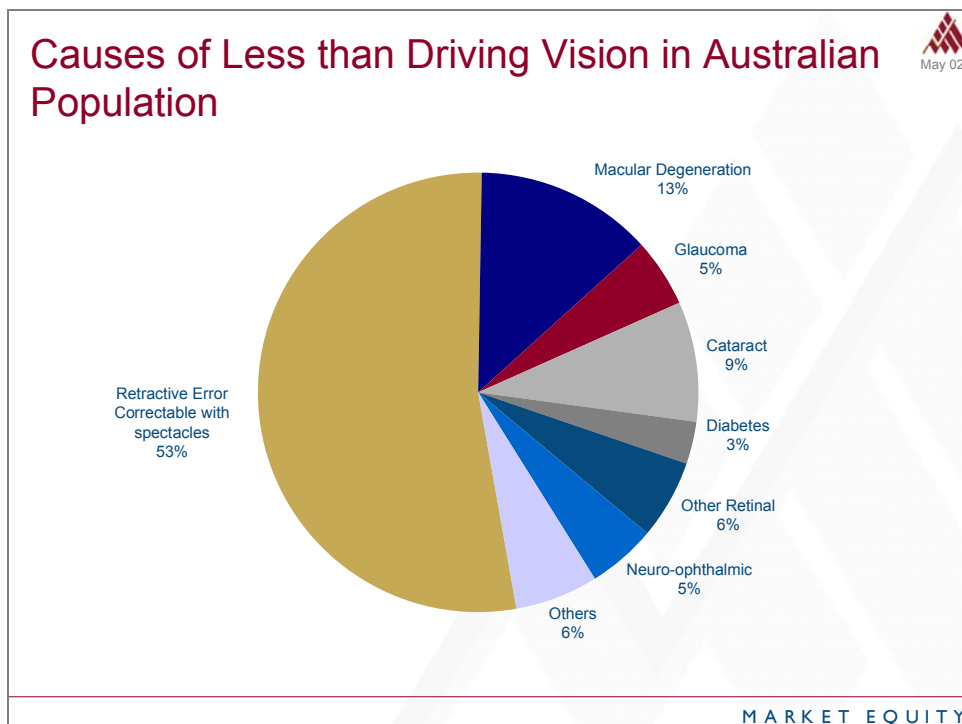
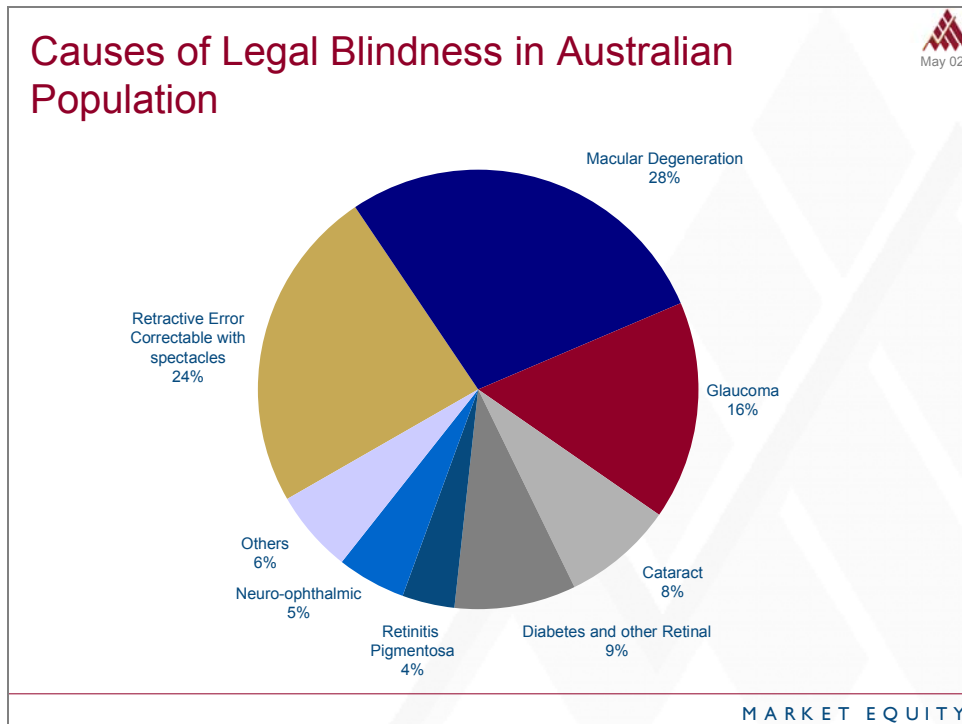




Figure 2:



The survey covers only those aged over forty and despite vision related associations confirming that the above figures are representative of their memberships, the figures should not be extrapolated to a wider population (ie, 193,300 with a print disability in Australia) as membership lists are not representative of the entire vision impaired community.





Learning/Attention Impairment

Overall

It is generally given by representative associations that were contacted that between 3% and 5% of the Australian population suffer from differing degrees of learning impairments.⁴ Whilst no specific figures on print disability are recorded by any Dyslexia-Speld Foundation in Australia, it is generally thought that around half of all sufferers would have difficulty reading a newspaper daily. That is, 2% of the Australian population aged 15 years or over or 298,216 have a print disability due to a learning or attention impairment.⁵ Whilst these figures are only an estimate, more reliable data sources do not disaggregate disability categories sufficiently to determine exact numbers with learning or attention related impairments.

State Profile

The estimates quoted above could not be disaggregated by State and Territory.

Learning/Attention Impairment Type

There are several representative organisations for those with learning or attention disorders and all were consulted in the research process. However, the estimates provided by the Dyslexia-Speld Foundation matched those provided by other representative bodies and to avoid duplicating the numbers, this was the source used in the final calculation.



⁴ Dyslexia Speld Foundation Australia, Learning and Attention Disorder Society Australia.

⁵ ABS, *1996 Census*.



Physical Impairment

Overall

A total of 205,723 Australians suffer a print disability due to physical disability. This figure encompasses arthritis and multiple sclerosis sufferers. This is a conservative estimate as lack of data has prevented gaining accurate statistics for some conditions. These omitted conditions include cerebral palsy, spinal injury, and age. The reasons for omission are explained below.

State Profile

Physical disability representative associations do not record specific membership numbers or other statistics of sufferers in their jurisdiction. It was therefore impossible to determine a State profile for those with a print disability through physical impairment.

Physical Impairment Type

Arthritis

The ABS states there are 850,000 arthritis sufferers who nominate arthritis as their main disability.⁶ The study estimates 24% of arthritis sufferers would encounter difficulties in basic physical tasks, including holding a book or newspaper. Therefore, 204,000 sufferers around Australia have a print disability due to the effects of arthritis.

Spinal Disability

A total of 10% of the population of Australia have severe spinal problems.⁷ However, after consultation with the relevant representative associations it is felt that RPH Australia is of less relevance for paraplegics and quadriplegics as occupational therapy in the home is sufficiently sophisticated that reading assistance apparatus' are fitted easily, making reading an easy task despite the spinal disability. In addition, paraplegics and quadriplegics are typically very high television watchers.

⁶ ABS, *Disability and Disabling Conditions*, 1998.

⁷ Para-Quad Association Australia.



Multiple Schlerosis

A total of 17,223 Australians suffer from multiple schlerosis (MS).⁸ MS is a complicated disease with varying levels of severity. One sufferer may only have one attack in their lifetime, while others are substantially disabled for their lifetime. It is estimated by MS representative organisations around Australian that 10% (1,723 people) of MS sufferers would have difficulty either holding a book or newspaper, have blurred vision, or other impairment that equates to a print disability.

Table 6: MS Sufferers by State/Territory

State or Territory	Sufferers in State/Territory	10% of Sufferers in State/Territory
New South Wales	3,599	360
Victoria	7,000	700
South Australia/Northern Territory	1,600	160
Queensland	1,778	178
Western Australia	1,746	175
Australian Capital Territory	600	60
Tasmania	900	90
Total	17,233	1,723

Cerebral Palsy

The Cerebral Palsy Association Australia does not have any records of sufferers in Australia. However, they do have statistics on sufferers in the USA and it is felt that there is little variation in the incidence of the condition between the two countries. A total of 0.17% of the population of the USA suffer the condition, extrapolated to Australia's population this results in 32,303 sufferers Australia wide. As well as muscular disability cerebral palsy often results in mental incapacitation, learning difficulties, hearing problems and vision impairment. As it has been impossible to determine the proportion of cerebral palsy sufferers who also suffer mental retardation, severe learning disabilities and hearing impairment, cerebral palsy has been omitted from the physical impairment figures.

⁸ Multiple Schlerosis Society of Australia.



Aged

Old age is recognised as a disabling condition that may lead to a print disability. However, the aged suffer print disability due to specific conditions outlined in this report such as arthritis and vision impairment. It is therefore felt to further profile the aged would severely duplicate the figures. In addition, the Office of Older Australians keep no reliable statistics that are disaggregated sufficiently to determine a print disability.

Whilst accurate figures for the aged with a print disability are not accessible it should not be ignored that they represent a significant proportion of the potential audience for RPH Australia.





Summary of Findings

The findings of the research provide an ideal starting point for RPH Australia members by identifying the potential audience both nationally and by State/Territory. A key finding from the research indicates there is a very low awareness of RPH Australia member's services, specifically amongst representative associations. This finding provides a perfect opportunity for partnership building with these organisations so that they may act as advocates for RPH services in communications with their members. For example, a representative of Arthritis WA who had no awareness of RPH Perth's service was very keen to form a partnership with them. She expressed a desire to recommend the service to Arthritis WA members as well as possibly having arthritis specific announcements broadcast on the station.

Therefore, key steps for RPH Australia in the near future should include establishing and/or strengthening relationships with representative organisations such as the following:

- ◆ Adult Literacy Council Australia.
- ◆ Association for the Blind WA.
- ◆ Royal Blind Society of NSW.
- ◆ QLD Blind Association.
- ◆ Royal Institute for the Blind SA.
- ◆ Royal VIC Institute for the Blind.
- ◆ Lion's Eye Institute.
- ◆ Hear a Book Service.
- ◆ Blind Citizens Australia.
- ◆ Dyslexia-Speld Foundation WA.
- ◆ Speld NSW, VIC, QLD, SA, TAS.
- ◆ Learning and Attention Disorder Society Australia.
- ◆ Arthritis Foundation of WA, NSW, VIC, SA, TAS, NT, ACT, QLD.
- ◆ Paraplegic – Quadriplegic Association of WA, NSW, VIC, QLD, SA, TAS, NT, ACT.
- ◆ Multiple Sclerosis Society of WA, NSW, VIC, QLD, SA, TAS, NT, ACT.
- ◆ Cerebral Palsy Associations of WA, NSW, VIC, QLD, SA, TAS, NT, ACT.
- ◆ Aged Council of Australia.
- ◆ ACROD.
- ◆ ACOSS.
- ◆ Disability Services Commission and other respective State bodies.
- ◆ Federal Department of Family and Community Services.
- ◆ Office of Disability.
- ◆ Office of Older Australians.

The building of these partnerships to establish a range of advocates for the service around Australia should be time and cost effective and ensure a significant audience increase. In addition, information sharing opportunities between RPH Australia and representative organisations could be mutually beneficial, such as raising awareness of disability services on air.





Concluding Comments

The results of the research have confirmed RPH Australia's presumptions that the potential audience is extensive in terms of both impairment type and number. Given this, there are clearly a number of opportunities for RPH around Australia to better service audience members and investigate preferences amongst the potential audience in order to improve the overall service offering.

The Directors and staff of Market Equity would like to thank RPH Australia for the opportunity of working on this project and very much look forward to the prospect of working together again in the future.

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