# Affordability of Communications Services

## Consumer Research Technical Annex

Published 13 November 2026

# Contents

Background ..... 3
Analysis Notes ..... 3
Statistical significance testing ..... 3
Overview of methodology ..... 4
Population estimates ..... 6
Definitions ..... 9

# Communications Affordability Tracker Research

## Background

1.1 We have been tracking consumers' attitudes and behaviours in our Communications Affordability Tracker since June 2020 via monthly telephone interviews among c.1,100 UK households. The research focuses on affordability issues and asks about actions respondents have taken to help afford communications services in the month prior to interview. Since May 2025, the data has been collected every six months.

1.2 The 2027 report 'Pricing trends for communication services in the UK' will primarily report survey data from the October 2026 wave of research where sample sizes allow.

## Analysis Notes

1.3 **Income analysis**: Analysis by income (e.g. the lowest household income category) is indicative only as a relatively high proportion (34% in October 2026, 35% on average[1]) of respondents were not willing or able to reveal this information. Non-response levels are higher in C2 and DE socio-economic groups. Therefore, it is possible that affordability issues among the lowest income category are understated.

1.4 **Age, ethnicity and working status:** These data points are based on the decision-maker for communications services in the household and do not necessarily reflect the make-up of the household. We do not collect these data for all members of the household.

## Statistical significance testing

1.5 When comparing survey results obtained from sub-groups of the sample, we factor in sampling error margins by conducting two-tailed statistical tests[2] and we only report significant differences at the 95% confidence level.[3] When comparing results between one wave of research and another, we conduct two-tailed statistical tests and only report significant differences at the 99% confidence level. This higher significance level is used to account for any slight differences in methodology across waves.

[1] This average is the % of respondents who have answered 'don't know' or 'refuse' over all 32 waves of research conducted.

[2] If we compare whether one demographic group is significantly different from another, two-tailed tests indicate whether the demographic group is significantly higher or lower than the comparison group. This differs from one-tailed tests, which explicitly test for differences in one direction. Therefore, if we hypothesised one group was significantly higher than the comparison and used a one-tailed test to assess this, if it turns out that group was significantly lower than the comparison, this would not be flagged.

[3] The confidence interval represents a range in which, if we repeated the survey 100 times, we would expect 95 of 100 samples' confidence intervals to contain a value that is equal to the actual number of households experiencing this issue.

# Overview of methodology

1.6 **Methodology**: CATIbus (Computer Assisted Telephone Interview) survey run by Ipsos MORI.

1.7 **Core objective**: To provide Ofcom with continued understanding of consumer affordability issues in the UK communications markets (covering mobile, landline, fixed broadband, pay TV and on-demand TV services).

1.8 **Sample size**: 1091 sole or joint decision-maker for communications services in their household and/or those who personally use a mobile phone (October 2026)

1.9 **Fieldwork period**: The fieldwork for the data referenced in this report was carried out during October 2026. Fieldwork generally takes place in the first two weeks of each month and therefore experiences largely reflect those of the previous month e.g., October fieldwork will largely reflect experiences in September.

1.10 **Sample definition**: UK adults aged 18+, identifying those who are either the sole or joint decision-maker for communications services in their household and/or those who personally use a mobile phone, for the main survey. Quotas are set on age, gender, working status and geographical regions. This sample also included a Northern Ireland boost, which was subsequently down weighted in the UK representative results.

1.11 **Sampling process**: Respondents were identified using random digit dialing. The unweighted split between mobile and landline interviews from October 2026 was 88% mobile and 12% landline and the weighted split was 89% and 11% respectively.

1.12 **Weighting**: The overall data is based on, and weighted to be representative of, the UK adult population (including non-telephone owning households) for the key demographic variables of; gender by age, region, social grade and working status. While the profile of the UK adult population is distinct from the profile of UK households, the questions were answered by a single person in the household and largely relate to what they, or anyone in their household has done or experienced. Therefore, we did not consider it necessary to reweight the data to be representative of UK households as we expect the decision maker sample to be representative of UK households.

1.13 Full details of the sampled and weighted profile of the sole or joint decision-maker for communications services in their household and/or those who personally use a mobile phone are included below.

**Full sample and weighting for combined dataset**

**Table A11: Weighted and Unweighted Sample Splits of October 2026 Sample**

| | October 2026 | |
|---|---|---|
| | Interviews achieved | Weighted |
| **Total**[4] | 1091 | 1092 |
| **Gender** | | |
| **Male** | 573 (53%) | 524 (49%) |
| **Female** | 500 (46%) | 550 (50%) |
| **Age groups** | | |
| **18-24** | 134 (12%) | 110 (10%) |
| **25-34** | 157 (14%) | 192 (18%) |
| **35-44** | 150 (14%) | 176 (16%) |
| **45-54** | 174 (16%) | 182 (17%) |
| **55-64** | 180 (17%) | 179 (16%) |
| **65-74** | 183 (17%) | 154 (14%) |
| **75+** | 113 (10%) | 99 (9%) |
| **Regions** | | |
| **North East** | 35 (3%) | 44 (4%) |
| **Yorkshire and Humberside** | 71 (7%) | 87 (8%) |
| **East Midlands** | 61 (6%) | 80 (7%) |
| **Eastern** | 110 (10%) | 104 (10%) |
| **Greater London** | 128 (12%) | 148 (14%) |
| **South East** | 150 (14%) | 150 (14%) |
| **South West** | 85 (8%) | 94 (9%) |
| **West Midlands** | 82 (8%) | 94 (9%) |

[4] When totals in these categories do not sum to 100%, this is because some respondents chose not to answer this question, or a non-standard answer was provided. We omitted this category from this section as less than 100 people gave this answer. Data based on latest Office for National Statistics ("ONS") population estimates.

| | | |
|---|---|---|
| **North West** | 118 (11%) | 117 (11%) |
| **Wales** | 54 (5%) | 49 (5%) |
| **Scotland** | 100 (9%) | 92 (8%) |
| **Northern Ireland** | 97 (9%) | 33 (3%) |
| **Socio-economic group** | | |
| **A** | 73 (7%) | 74 (7%) |
| **B** | 237 (22%) | 231 (21%) |
| **C1** | 356 (33%) | 256 (24%) |
| **C2** | 132 (12%) | 232 (21%) |
| **D** | 84 (8%) | 107 (10%) |
| **E** | 124 (11%) | 138 (13%) |
| **Working status** | | |
| **Any working** | 630 (58%) | 676 (62%) |
| **Any not working** | 461 (42%) | 416 (38%) |

## Population estimates

The population estimates from the October 2026 *Communications Affordability Tracker* are:

a) the number of households that experienced an affordability issue with any communications services 'in the last month' (23% of total UK households in October 2026 – Table A12);

b) the number of households that experienced an affordability issue with their fixed broadband service 'in the last month' (9% of households that own/recently owned fixed broadband in October 2026, which equates to 7% of total UK households – Table A13);

c) the number of households that experienced an affordability issue with their mobile service 'in the last month' (7% of households that own/recently owned a mobile phone in October 2026, which equates to 7% of total UK households – Table A14).

1.14 As we cannot know exactly how many households in the UK are experiencing an issue, alongside each population estimate, we provide a 95% confidence interval. Confidence intervals indicate the range within which we are 95% sure contains the 'real' number of households in the UK in a particular group. These confidence intervals are given in the form of a range around the midpoint value (e.g., +/- 500,000 households) in the main report footnotes, and as an estimate of the upper or lower bound number of households in a particular group in the tables below.

1.15 We generate these by calculating a confidence interval around the estimated number of households that are in our population of interest, and then multiplying these upper and lower bounds by the number of households in the UK.

All generated household estimates and confidence intervals are reported to the nearest 100,000 and use the latest ONS population estimates. This is the standard rounding that Ofcom use in producing population estimates from survey data with a sample size of around 1100. Larger samples sizes are required to provide more precision.

**Table A12: Any communications affordability issue, in the last month**

| | October 2026 % | ONS - number of households in UK | Estimated number of households (rounded to nearest 100,000) |
|---|---|---|---|
| **% and population estimate of UK households experiencing any affordability issue (in the last month)** | **23%** | 29,003,000 | **6,800,000** |
| **Upper bound** | 26% | | 7,600,000 |
| **Lower bound** | 21% | | 6,100,000 |
| **Overall Population Estimate** | | | |
| **6,800,000 +/- 700,000** | | | |

**Table A13: Any fixed broadband affordability issue, in the last month**

| | October 2026 % | ONS - number of households in UK | Estimated number of households (rounded to nearest 100,000) |
|---|---|---|---|
| **% and population estimate of UK households experiencing any fixed broadband affordability issue (in the last month)** | **7%** | 29,003,000 | **2,000,000** |
| **Upper bound** | 9% | | 2,500,000 |
| **Lower bound** | 5% | | 1,500,000 |
| **Overall Population Estimate** | | | |
| **2,000,000 +/- 500,000** | | | |

**Table A14: Any mobile broadband affordability issue, in the last month**

| | October 2026 % | ONS - number of households in UK | Estimated number of households (rounded to nearest 100,000) |
|---|---|---|---|
| **% and population estimate of UK households experiencing any mobile broadband affordability issue (in the last month)** | **7%** | 29,003,000 | **2,100,000** |
| **Upper bound** | 9% | | 2,600,000 |
| **Lower bound** | 6% | | 1,600,000 |
| **Overall Population Estimate** | | | |
| **2,100,000 +/- 500,000** | | | |

# Definitions

**Any affordability issue:** Households who experienced at least one affordability issue with a communications service. Some households experienced more than one affordability issue either with a given service and/or across multiple services. The nets for 'any affordability issue' only count multiple issues/services once to avoid double counting.

**Impacting or limiting conditions:** These are households with a resident that has any conditions that impact or limit their use of communication services. These can include, but are not restricted to, problems with hearing, eyesight, mobility, mental abilities or mental health.

**Currently unemployed and looking for work:** These are respondents who when asked about their current work status, answered that they are currently unemployed and seeking work.

**Receive at least one benefit:** These are households who receive one or more of the following benefits: income support, income-based job seeker's allowance, pensions credit (guaranteed credit), pensions credit (no guaranteed credit), employment and support allowance (ESA), universal credit (both with and without earnings in addition to this), personal independence payment (PIP), carer's allowance, or 'other' form of benefit. Those who receive more than one form of benefit are not double counted.

**Receive means tested benefits, zero earnings:** These are households who receive one or more of the following benefits: income support, income-based job seeker's allowance, employment and support allowance (ESA), universal credit (without earnings in addition to this). Those who receive more than one form of these benefits are not double counted.

**Receive means tested benefits:** These are households who receive one or more of the following benefits: income support, income-based job seeker's allowance, employment and support allowance (ESA), universal credit (both with and without earnings in addition to this). Those who receive more than one form of these benefits are not double counted.

**Eligible for social tariffs:** These are households who receive one or more of the following benefits: income support, income-based job seeker's allowance, employment and support allowance (ESA), pensions credit – guaranteed credit, or universal credit (both with and without earnings in addition to this). Those who receive more than one form of these benefits are not double counted.

**DE socio-economic group:** Households where the chief income earner (CIE) falls within one of the following categories: semi-skilled and unskilled manual workers, state pensioners, casual and lowest grade workers, unemployed with state benefits only[5].

**Social Tariff:** Social tariffs are cheaper broadband and mobile phone packages for people claiming Universal Credit, Pension Credit and some other benefits. Some providers call them 'essential' or 'basic' broadband.

[5] This definition is available at ONS Approximated Social Grade, England and Wales - Office for National Statistics