Methodology and background
Methodology and notes on analysis

Methodology

• All interviews conducted using Kantar Face-to-Face Omnibus
• Nationally representative sample of 2,045 UK adults aged 16+
  – All interviews are conducted via the field team and in accordance with strict quality control procedures.
  – The omnibus uses robust sampling (e.g. a comprehensive address based system cross referenced to the census data. For each wave, 143 sample points are selected and, within these selected primary sampling points, a postcode sector is chosen.) Quotas (by sex, working status and presence of children) are set during interviewing to ensure the sample is as representative as possible
  – Weighting is also then applied to ensure that the sample is fully representative of the UK population
• Fieldwork 22nd October – 26th October 2014

Notes on analysis

• Given the focus of the omnibus on affordability of communications, much of the analysis is among the 1562 respondents who have some responsibility for the decisions on what communications to pay for and use. This is 75% of the UK adults aged 16+ who were interviewed as part of Kantar’s omnibus.
• Where bases sizes are low in reporting, i.e. less than 100, this is noted on the charts.

NB The data included in this data pack is reported with commentary within Ofcom’s Consumer Experience Report 2014:

www.stakeholders.ofcom.org.uk/market-data-research/market-data/consumer-experience-reports/
Claimed difficulties paying for communications services
Main findings – difficulties paying for communications services

Difficulties paying for communications services in the last year

% of adults with some responsibility for communications services

14% of adults with some responsibility for communications services had any difficulties paying for communications services in the last year

- More frequent difficulties: 3%
- One or two difficulties: 10%
- No difficulties: 84%
- Don’t know: 2%

Source: Kantar Media Omnibus
Base: All with some responsibility for communications services (N=1562)
Question: Q.5 The next questions are about your experiences of paying for communications services and if you have had any difficulties paying for the services in the last year. Communications services in this questionnaire means a mobile phone (including a smartphone), any sort of internet, landline phone at home, public payphones or a TV service with additional channels you pay to receive (e.g. Sky, BT Vision or Virgin Media). Which, if any, of the following apply to you?
Main findings – difficulties paying for communications services

Difficulties paying for communications services in the last year

% of all adults 16+ in the UK

- More frequent difficulties: 8%
- One or two difficulties: 63%
- No difficulties: 25%
- Not asked (as not responsible for comms choice/payment): 2%
- Don’t know: 1%

10% of adults have any difficulties paying for communications services

Source: Kantar Media Omnibus
Base: All adults 16+ in the UK (N=2045)
Question: Q.5 The next questions are about your experiences of paying for communications services and if you have had any difficulties paying for the services in the last year. Communications services in this questionnaire means a mobile phone (including a smartphone), any sort of internet, landline phone at home, public payphones or a TV service with additional channels you pay to receive (e.g. Sky, BT Vision or Virgin Media). Which, if any, of the following apply to you?
Main findings – difficulties paying for communications services

Difficulties paying for communications services in the last year

% of adults with some responsibility for communications services

<table>
<thead>
<tr>
<th></th>
<th>14%</th>
<th>20%</th>
<th>15%</th>
<th>4%</th>
<th>14%</th>
<th>10%</th>
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<tr>
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<td>3%</td>
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<td>7%</td>
<td>0%</td>
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<td>Wales*</td>
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<td>4%</td>
<td>2%</td>
<td>7%</td>
<td>0%</td>
<td>10%</td>
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<tr>
<td>Northern Ireland*</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>4%</td>
<td>2%</td>
<td>7%</td>
<td>0%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: Kantar Media Omnibus
Base: All with some responsibility for communications services (N=1562), (370), 35-64 (717), 65+ (475), England (1311), Scotland (129), Wales (69), Northern Ireland (53). *Please note low base size

Question: Q.5 The next questions are about your experiences of paying for communications services and if you have had any difficulties paying for the services in the last year. Communications services in this questionnaire means a mobile phone (including a smartphone), any sort of internet, landline phone at home, public payphones or a TV service with additional channels you pay to receive (e.g. Sky, BT Vision or Virgin Media). Which, if any, of the following apply to you?
Main findings – difficulties paying for communications services

Difficulties paying for communications services in the last year
% of adults with some responsibility for communications services

<table>
<thead>
<tr>
<th>Percentages</th>
<th>Total</th>
<th>AB</th>
<th>C1C2</th>
<th>DE</th>
<th>Any long term disability/illness</th>
<th>No long term disability/illness</th>
<th>White</th>
<th>Minority ethnic group</th>
</tr>
</thead>
<tbody>
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<td>14%</td>
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<td>6%</td>
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<td>13%</td>
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<td>3%</td>
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<td>10%</td>
<td>10%</td>
<td>4%</td>
<td>4%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Net: any difficulty

- More frequent difficulties
- One or two difficulties
- No difficulties
- Don’t know

Source: Kantar Media Omnibus
Base: All with some responsibility for communications services (N=1562). AB (292), C1C2 (705), DE (565), Any long term disability/illness (305), No long term disability/illness (1206), White ethnic group (1379), Minority ethnic group (179)
Question: Q.5 The next questions are about your experiences of paying for communications services and if you have had any difficulties paying for the services in the last year. Communications services in this questionnaire means a mobile phone (including a smartphone), any sort of internet, landline phone at home, public payphones or a TV service with additional channels you pay to receive (e.g. Sky, BT Vision or Virgin Media). Which, if any, of the following apply to you?
Main findings – difficulties paying for communications services

Services had any difficulties paying for in the last year

<table>
<thead>
<tr>
<th>Service</th>
<th>% of adults with any difficulties paying for communications services in the last year</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV service with additional channels you pay to receive</td>
<td>25%</td>
</tr>
<tr>
<td>Smartphone or standard mobile phone</td>
<td>24%</td>
</tr>
<tr>
<td>Fixed broadband</td>
<td>19%</td>
</tr>
<tr>
<td>Fixed landline</td>
<td>17%</td>
</tr>
<tr>
<td>Service within a bundle, from one supplier, but not sure which</td>
<td>13%</td>
</tr>
<tr>
<td>Calls using a public payphone</td>
<td>4%</td>
</tr>
<tr>
<td>Tablet with internet access</td>
<td>3%</td>
</tr>
<tr>
<td>Mobile broadband</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>Don't know</td>
<td>14%</td>
</tr>
</tbody>
</table>

Source: Kantar Media Omnibus
Base: All with any difficulties paying for communications services in the last year (N=208).
Question: Q.6 Which of the following services have you had any difficulties paying for in the last year?
Main findings – difficulties paying for communications services

Services had any difficulties paying for in the last year
% of adults with some responsibility for communications services

- TV service with additional channels you pay to receive: 3%
- Any smartphone or standard mobile phone: 3%
- Fixed broadband: 3%
- Fixed landline: 2%
- Service within a bundle, from one supplier, but not sure which: 2%
- Calls using a public payphone: 1%
- Mobile broadband: 0%
- Tablet with internet access: 0%
- Other: 0%
- Don't know: 2%

2% said a smartphone in particular
1% said a standard mobile phone in particular

Number of services mentioned:
9% - 1 service
2% - 2 or more services

86% Not asked because do not have any difficulties paying for communications

Source: Kantar Media Omnibus
Base: All with some responsibility for communications services (N=1562)
Question: Q.6 Which of the following services have you had any difficulties paying for in the last year?
Main findings – difficulties paying for communications services

Services had any difficulties paying for in the last year
% of all adults 16+ in the UK

TV service with additional channels you pay to receive 3%
Any smartphone or standard mobile phone 3%
Fixed landline 2%
Fixed broadband 2%
Service within a bundle, from one supplier, but not sure which 1%
Mobile broadband 0%
Tablet with internet access 0%
Calls using a public payphone 0%
Other 0%
Don't know 1%
Not asked because no responsibility for comms or no difficulties paying for services 90%

2% said a smartphone in particular
1% said a standard mobile phone in particular

Number of services mentioned:
7% - 1 service
1% - 2 or more services

Source: Kantar Media Omnibus
Base: All adults 16+ in the UK (N=2045)
Question: Q.6 Which of the following services have you had any difficulties paying for in the last year?
Main findings – difficulties paying for communications services

Services had any difficulties paying for in the last year
% of adults with some responsibility for communications services and who have each service/device being reported

- TV service with additional channels you pay to receive: 6%
- Smartphone or standard mobile phone: 4%
- Smartphone: 4%
- Standard phone: 3%
- Fixed broadband: 2%
- Mobile broadband: 2%
- Fixed landline: 1%

Source: Kantar Media Omnibus
Base: All with some responsibility for communications services with each service type, pay TV (621), smartphone/standard phone (1285), smartphone (889), standard mobile phone (388), fixed broadband (869), mobile broadband (114), fixed landline (1048)
Question: Q.6 Which of the following services have you had any difficulties paying for in the last year?
Note: Any communications service is a summary code
Claimed debt
Main findings – debt

Debt on communications services in the last year

% of adults with some responsibility for communications services

- ANY communications service: 3%
- TV service with additional channels you pay to receive: 1%
- Any smartphone or mobile phone: 1%
- Fixed landline phone at home: 1%
- Smartphone: 1%
- Fixed broadband: 0%
- Mobile broadband: 0%
- Tablet with internet access: 0%
- Standard mobile phone: 0%
- Gas*: 2%
- Electricity*: 2%
- Water*: 2%

This means that across all adults in the UK 2% claim to have some sort of communications debt in the last year.

Of the 45 respondents who said they had a communications debt:
- 34 said this was a ‘manageable’ debt,
- 5 said this was a ‘serious or unmanageable’ debt.
- 6 said they didn’t know.

Source: Kantar Media Omnibus
Base: All with some responsibility for communications services (N=1562). Those with communications debt (N=44 unweighted, 45 weighted), all UK adults (2045)
Question: Q.7 Have you been behind in your payment for any of the following services or products by one month or more in the last year? Question: Q.8 Which of these applies to you?
Note: Any communications service is a summary code. *The data for gas, electricity and water is based of those with responsibility for decisions on communications rather than those with responsibility for each of the utilities – this data is therefore primarily useful as context to the communications debt, rather than a measure of the utilities themselves.
Debt on communications services in the last year

% of adults with some responsibility for communications services and who have each service/device being reported

- TV service with additional channels you pay to receive: 2%
- Mobile broadband: 2%
- Smartphone or standard mobile phone: 1%
- Smartphone: 1%
- Fixed landline: 1%
- Standard phone: 0%
- Fixed broadband: 0%

Source: Kantar Media Omnibus
Base: All with some responsibility for communications services with each service type, pay TV (621), smartphone/standard phone (1285), smartphone (889), standard mobile phone (388), fixed broadband (869), mobile broadband (114), fixed line (1048)
Question: Q.7 Have you been behind in your payment for any of the following services or products by one month or more in the last year?
Note: Any communications service is a summary code.
Debt on communications services in the last year

% of adults with some responsibility for communications services, by demographics

Any communications debt

- All: 3%
- 16-34: 6%
- 35-64: 2%
- 65+: 1%
- AB: 2%
- C1C2: 3%
- DE: 4%
- White: 3%
- Minority Ethnic Group: 2%
- Long-term illness or disability: 4%
- None: 3%
- England: 3%
- Scotland: 1%
- Wales*: 5%
- Northern Ireland*: 7%

Source: Kantar Media Omnibus
Base: All with some responsibility for communications services (N=1562), 16-34 (307), 35-64 (717), 65+ (475), England (1311), Scotland (129), Wales (69), Northern Ireland (53). AB (292), C1C2 (705), DE (565), Any long term disability\illness (305), No long term disability\illness (1206), White ethnic group (1379), Minority ethnic group (179) *Please note low base size
Question: Q.7 Have you been behind in your payment for any of the following services or products by one month or more in the last year?
Note: Any communications service is a summary code.
Impact of affordability of communications services and any difficulties paying or debt
Main findings – impact of affordability of communications services and any difficulties paying or debt

How consumers afford communications services as part of monthly spend

% of adults with any difficulties paying for communication services in the last year

<table>
<thead>
<tr>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am careful about what I buy/spend</td>
<td>40%</td>
</tr>
<tr>
<td>I cut back on luxuries e.g. going out less</td>
<td>30%</td>
</tr>
<tr>
<td>I buy cheaper goods/services</td>
<td>19%</td>
</tr>
<tr>
<td>I go without certain smaller goods/services</td>
<td>12%</td>
</tr>
<tr>
<td>I go without certain larger goods/services</td>
<td>11%</td>
</tr>
<tr>
<td>I use my communications services less</td>
<td>9%</td>
</tr>
<tr>
<td>I borrowed from family/friends</td>
<td>9%</td>
</tr>
<tr>
<td>I have sold items</td>
<td>9%</td>
</tr>
<tr>
<td>I have decided to cancel one of my other...</td>
<td>7%</td>
</tr>
<tr>
<td>I have asked family/friends to pay the bill/accepted</td>
<td>5%</td>
</tr>
<tr>
<td>I have taken out a loan from a bank or another...</td>
<td>2%</td>
</tr>
<tr>
<td>None of these</td>
<td>26%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>3%</td>
</tr>
</tbody>
</table>

Summary codes

| Financial support or actions e.g. borrowing/selling                         | 18%        |
| Used communications services less or cancelled                             | 14%        |

Affordability issues: i.e. respondents in debt in the last year with any communications service or who had taken a loan or sold items as a way to afford communications service as part of their monthly spending:

- 28% of those who have had any difficulty affording communications services
- 4% of those who have some responsibility for decision or paying for communications services
- 3% of the adult population.

Source: Kantar Media Omnibus
Base: All with any difficulties paying for communications services in the last year (N=208). Note: Only responses of 1% or more are shown
Question: Q.9 When thinking about how you afford your communications services as part of your monthly spending, which, if any, of the following apply to you?
Note: The codes are summary codes. Used communications services less or cancelled service, Spend less or going without non communications item, Borrow from family/friends, Sold items, Take out a loan from a bank or another lender, None of these, Don’t know.
Main findings – impact of affordability of communications services and any difficulties paying or debt

Communications affordability issues

In order to provide a measure of those impacted by affordability issues, we have identified the portion of respondents who:

- Have been in debt in the last year with any communications service (i.e. behind in the payment by at least a month) (at Q7)
- OR,
- Who say they have taken a loan or sold items as a way to afford communications service as part of their monthly spending (at Q9)

• This equates to:
  - 28% of those who have had any difficulty affording communications services
  - 4% of those who have some responsibility for decision or paying for communications services
  - 3% of the adult population

Source: Kantar Media Omnibus
Base: All with some responsibility for communications services (N=1562). Only responses of 1% or more are shown
Question: Q.7 Have you been behind in your payment for any of the following services or products by one month or more in the last year? Q.9 When thinking about how you afford your communications services as part of your monthly spending, which, if any, of the following apply to you?
Note: The following are summary codes: Used communications services less or cancelled service, Spend less or going without non communications items, Financial support or actions
Affordability: communications services do not have due to ‘cost’

% of adults with some responsibility for communications services

- Any communications service: 20%
- Any smartphone or mobile phone: 7%
- Mobile broadband: 7%
- Fixed Landline: 6%
- Smartphone: 5%
- Fixed broadband: 4%
- Calls using a public payphone: 4%
- Mobile phone: 3%
- None of these: 78%
- Don't know: 2%
- Only 1 service: 14%
- 2 services: 3%
- 3 or more services: 2%

Source: Kantar Media Omnibus
Base: All with some responsibility for communications services (N=1562).
Question: Q.10 And which, if any, of the following do you not have because of cost?
Note: Any communications service, Any mobile/smartphone, Only 1 service, 2 services, 3 or more services are all summary codes

It is worth noting that the question on cost as a reason for not having a service is relatively broad in that it does not specify that they cannot ‘afford’ the service (there may have been other factors that influenced their decision or ability to take up the service).
Main findings – impact of affordability of communications services and any difficulties paying or debt

Affordability: if any communications services are not owned due to ‘cost’, by demographics

% of adults with some responsibility for communications services

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>20%</td>
</tr>
<tr>
<td>16-34</td>
<td>24%</td>
</tr>
<tr>
<td>35-64</td>
<td>19%</td>
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<td>65+</td>
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<td>AB</td>
<td>16%</td>
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<tr>
<td>C1C2</td>
<td>19%</td>
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<td>DE</td>
<td>24%</td>
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<tr>
<td>White</td>
<td>20%</td>
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<td>Minority Ethnic Group</td>
<td>16%</td>
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<tr>
<td>Long-term illness or disability</td>
<td>22%</td>
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<tr>
<td>None</td>
<td>19%</td>
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<tr>
<td>England</td>
<td>21%</td>
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<tr>
<td>Scotland</td>
<td>15%</td>
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<tr>
<td>Wales</td>
<td>18%</td>
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<tr>
<td>Northern Ireland</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: Kantar Media Omnibus
Base: All with some responsibility for communications services (N=1562), 16-34 (307), 35-64 (717), 65+ (475), England (1311), Scotland (129), Wales (69), Northern Ireland (53). AB (292), C1C2 (705), DE (565), Any long term disability/illness (305), No long term disability/illness (1206), White ethnic group (1379), Minority ethnic group (179) *Please note low base size

Question: Q.10 And which, if any, of the following do you not have because of cost?
Note: Any communications service, Any mobile/smartphone, Only 1 service, 2 services, 3 or more services are all summary codes

It is worth noting that the question on cost as a reason for not having a service is relatively broad in that it does not specify that they cannot ‘afford’ the service (there may have been other factors that influenced their decision or ability to take up the service).
Main findings – impact of affordability of communications services and any difficulties paying or debt

Affordability: communications services do not have due to ‘cost’

% of all adults 16+ in the UK

- Any communications service: 15%
- Any smartphone or mobile phone: 6%
- Mobile broadband: 5%
- Fixed Landline: 4%
- Smartphone: 4%
- Fixed broadband: 3%
- Calls using a public payphone: 3%
- Mobile phone: 2%
- None of these: 59%
- Don’t know: 2%
- Not asked because no responsibility for...
- Only 1 service: 11%
- 2 services: 2%
- 3 or more services: 2%

It is worth noting that the question on cost as a reason for not having a service is relatively broad in that it does not specify that they cannot ‘afford’ the service (there may have been other factors that influenced their decision or ability to take up the service).

Source: Kantar Media Omnibus
Base: All adults 16+ in the UK (N=2045)
Question: Q.10 And which, if any, of the following do you not have because of cost?
Note: Any communications service, Any mobile/smartphone, Only 1 service, 2 services, 3 or more services are all summary codes
### Main findings – impact of affordability of communications services and any difficulties paying or debt

**Affordability: communications services do not have due to ‘cost’**

<table>
<thead>
<tr>
<th>Service</th>
<th>% of adults with some responsibility for communications services</th>
<th>% of all adults</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any communications service</td>
<td>20%</td>
<td>15%</td>
</tr>
<tr>
<td>Any smartphone or mobile phone</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Mobile broadband</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Fixed Landline</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Fixed broadband</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Calls using a public payphone</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Mobile phone</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>None of these</td>
<td>78%</td>
<td>59%</td>
</tr>
<tr>
<td>Don't know</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Only 1 service</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>2 services</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>3 or more services</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

It is worth noting that the question on cost as a reason for not having a service is relatively broad in that it does not specify that they cannot ‘afford’ the service (there may have been other factors that influenced their decision or ability to take up the service).

Source: Kantar Media Omnibus  
Base: All with some responsibility for communications services (N=1562). All adults 16+ in the UK (N=2045)  
Question: Q.10 And which, if any, of the following do you not have because of cost?  
Note: Any communications service, Any mobile/smartphone, Only 1 service, 2 services, 3 or more services are all summary codes.
**Affordability: Impact of not having communications services**

% of all who don’t have service / cancelled a service due to cost

- **58%** No negative effect at all
- **13%** No negative effect because I have alternatives
- **7%** Less entertainment
- **6%** Makes it more difficult to find the cheapest goods/services
- **5%** Miss out on contact with family/friends
- **5%** Less able to look for work
- **4%** Prevents access to information, e.g. news, health information, etc.
- **4%** Prevents access to other key services (e.g. bank, utilities, …)
- **4%** Difficult to stay organised e.g. online shopping, etc.
- **3%** Prevents access to government services (e.g. tax, driving licences etc.)
- **2%** Less able to carry out work from home
- **1%** Prevents access to emergency services and information that keeps...
- **1%** Lack of support for special needs
- **9%** Don’t know

**Main findings – impact of affordability of communications services and any difficulties paying or debt**

Overall, 4% of those responsible for communications said that they did not have a service “because of cost” and this had had any sort of negative impact. This equates to 3% of the UK adults surveyed.

Source: Kantar Media Omnibus

Base: All who don’t have service / cancelled a service due to cost (N=314). Note: Only responses of 1% or more are shown.

Question: Q.11 You mentioned that you don’t have these services because of cost, or you have cancelled a service because of cost. How does NOT having this service affect you?
Main findings – Use of universal communications services
Main findings - use of universal communications services

Universal communications services used

% of all adults 16+ in the UK

- None of these: 73%
- ANY Directory enquiries: 16%
- Directory enquiries via internet: 8%
- Itemised billing - that you pay extra for: 8%
- Directory enquiries via phone: 6%
- Payphone: 4%
- Directory enquiries via BT phonebook: 4%
- Don't know: 2%

Source: Kantar Media Omnibus
Base: All adults 16+ in the UK (N=2045).
Question: Q.12 Which, if any, of the following communications services have you used in the last 12 months?
## Universal communications services used

<table>
<thead>
<tr>
<th>Subgroup / %</th>
<th>Base size</th>
<th>Payphone</th>
<th>Directory enquiries vis BT Phonebook</th>
<th>Directory enquiries via phone</th>
<th>Directory enquiries via internet</th>
<th>Itemised bill – that you pay extra for</th>
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</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>2045</td>
<td>4</td>
<td>4</td>
<td>6</td>
<td>8</td>
<td>8</td>
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<tr>
<td>16-34</td>
<td>601</td>
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<td>5</td>
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<td>65+</td>
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<td>AB</td>
<td>372</td>
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<td>4</td>
<td>9</td>
<td>11</td>
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<td>9</td>
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<td>3</td>
<td>4</td>
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<td>Minority Ethnic Group</td>
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<td>1</td>
<td>4</td>
<td>6</td>
<td>10</td>
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<tr>
<td>Has a disability or long term illness</td>
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<td>6</td>
<td>6</td>
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<td>7</td>
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<tr>
<td>Wales</td>
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<td>7</td>
<td>10</td>
<td>3</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>60*</td>
<td>14</td>
<td>10</td>
<td>7</td>
<td>24</td>
<td>8</td>
</tr>
</tbody>
</table>

Source: Kantar media Omnibus  
Base: All telephone shops 2045 * Caution low base size.  
Question: Q.12 Which, if any, of the following communications services have you used in the last 12 months?