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GfK NOP

LANDLINE NUISANCE CALLS PANEL

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Research Overview

Background

- Nuisance calls is an issue of growing concern for consumers, and a priority area for Ofcom as set out in its Annual Plan 2013/14.
- Ofcom obtains information about consumers' experiences of nuisance calls (silent calls, abandoned calls, recorded messages and live marketing calls) from different sources, in particular: the Ofcom-commissioned Consumer Concerns Tracker, as well as complaints data on silent and abandoned calls from the Ofcom Consumer Contact Team (CCT) and online complaints form. However, only the first source provides a nationally representative understanding of consumer's experience of such calls; furthermore, other sources such as complaints data are impacted by external factors such as awareness of Ofcom as a body to complain to about such issues and publicity surrounding an issue or investigation.
- In addition, in light of developments in the market Ofcom wanted to check whether the current Consumer Concerns Tracker approach (face to face omnibus) was the most appropriate way to collect information on experience of nuisance calls. There are various reasons for this:
 - The Consumer Concerns Tracker monitors personal experience retrospectively over the previous 6 month period - relying on long term memory.
 - The variety of nuisance calls that consumers may be exposed to has increased over the years and the range now includes abandoned calls, silent calls, recorded messages and live marketing calls, making it potentially hard for consumers to remember and/or differentiate.
 - There was also a hypothesis that some consumers might be putting their phone down if they initially heard silence on the other end of the line, before a live operator spoke or a recorded message was played.
- Ofcom therefore wished to understand the extent to which the Consumer Concerns Tracker provided a reliable record of the incidence of different types of nuisance calls. It also wished to obtain greater insights into areas that cannot be covered by an omnibus survey, such as the companies and sectors generating nuisance calls.
- Ofcom commissioned GfK NOP to undertake a research programme that consisted of two stages:
 - Recruitment of a bespoke panel of UK landline users. Panel members were given a paper diary to keep near to their landline phone for a four week period in January to February 2013 and were asked to complete this immediately after receiving any nuisance calls.
 - In order to compare the panel methodology with the current methodology, face-to-face omnibus data on nuisance landline calls was collected in the second week of February relating to the same four week period as the diary study.

- The findings from these two methodologies were compared to enable Ofcom to understand whether a panel approach, which collects incidence in 'real time', produces a significantly different level of reported experience of nuisance calls compared to the retrospective omnibus approach. The results of this comparison are contained in Appendix 1.

Research Aims

- To measure the incidence, type and frequency of nuisance calls UK consumers receive on their home landline phone.
- To gather subsequent 'real time' support data including date, time and duration of any unsolicited calls, and a full description of the experience i.e. the company/person calling, what it was about, and whether the caller's telephone number was identifiable.
- To gauge whether a 'real time' diary approach produces a significantly different level of claimed experience of nuisance calls compared to the current 'retrospective' face to face omnibus methodology.

Methodology

Stage 1:

- Recruitment of a UK nationally representative sample of 1136 people with home landline phones to undertake a diary study to record all unwanted calls¹ personally received on their home landline phones across a four week period (14th January to 10th February 2013).
- Panellists were provided with a paper diary and were instructed to complete a page after receiving a nuisance call on their landline phone. A full explanation of the panel task and examples of the instructions and diary given to panellists is in Appendices 2 and 4.
- Target diary completion was n=800 respondents; actual completions were n=853. Final data was weighted back to the UK nationally representative landline-owning population by demographics and internet access using quotas derived from Ofcom's Technology Tracker (see Appendix 3).

Stage 2:

- One wave of face-to-face UK omnibus research (n=1917) to compare against panel data in order to evaluate the accuracy of different methods of data collection. The omnibus questionnaire is available in Appendix 5.
- Fieldwork was towards the end of the panel research period (7-14 February 2013) and included questions regarding recall of nuisance calls received in the last four weeks, amongst fixed landline telephone owners, thus enabling Ofcom to compare results from the same fieldwork period.

¹ The term 'unwanted calls' was used in the recruitment letter, instruction sheet and paper diary provided to respondents, as it was felt to be a clearer, more consumer-friendly term than 'nuisance calls'. In this report 'unwanted calls' are referred to as 'nuisance calls'.

Differences in results

- For reporting purposes, differences are noted in the report only when they are statistically significant. Differences are noted within sub-groups (e.g. age), rather than between sub-group and total sample.
- Differences have been reported at the 99% confidence level, meaning that we can be 99% certain that there is a real difference between the two results; this is the most stringent standard test of significance.
- Whether or not a difference is significant is determined by the sample sizes of the two scores, and also by how close the two scores are to the average score; for example, the difference between two percentages needs to be greater the closer the percentages are to 50% in order to be significant. Additionally, the weighting of the data can have a slight impact on the significance testing.

Definition of call types

Panellists were provided with the following definitions in order to record any nuisance calls they may receive in the appropriate 'call type' category (see Appendix 4 for more details).

Silent call	This is when a consumer answers the telephone and there is no one to answer at the other end and there is silence on the line. This includes calls where the consumer hears people talking in the background, but no-one speaks to them directly.
Abandoned call	This is where a company's telephone system has tried to call but when the call was answered there was no operator available to speak to the person who answered the phone. A recorded message will be heard telling the consumer that a company has tried to call, but when the call was put through there was no operator available to speak to them. The message should also provide a contact number to stop future calls.
Recorded marketing/sales message	This is where a consumer hears a recorded message telling them about a product or service (perhaps a cruise, debt advice or payment protection insurance claim), which may then ask them to press a button to speak to somebody.
Live marketing/sales call	This is where there is a call centre agent at the end of the line when you answer the call, and who then tries to sell you something - for example, how to save money on your energy bill - or invites you to make a compensation claim, such as for an accident or payment protection insurance mis-selling.
Other	Any other type of nuisance call.

Executive Summary

Ofcom commissioned GfK NOP to conduct a nationally representative sample of UK adults with home landline phones to undertake a diary study to record all unwanted calls² personally received on their home landline phone across a four week period (14th January to 10th February 2013).

Panellists were provided with a paper diary and were instructed to complete a diary page every time they considered that they received a nuisance call³ on their landline phone. This allowed GfK and Ofcom to collect information about these types of calls in 'real time', and provided greater insight over that of a traditional (retrospective) survey - such as information on industries making these types of calls, availability of the caller's telephone number and company details⁴.

Panellists were provided with the following definitions in order to record any nuisance calls they may receive in the appropriate 'call type' category (see Appendix 4 for more details).

Silent call	This is when a consumer answers the telephone and there is no one to answer at the other end and there is silence on the line. This includes calls where the consumer hears people talking in the background, but no-one speaks to them directly.
Abandoned call	This is where a company's telephone system has tried to call but when the call was answered there was no operator available to speak to the person who answered the phone. A recorded message will be heard telling the consumer that a company has tried to call, but when the call was put through there was no operator available to speak to them. The message should also provide a contact number to stop future calls.
Recorded marketing/sales message	This is where a consumer hears a recorded message telling them about a product or service (perhaps a cruise, debt advice or payment protection insurance claim), which may then ask them to press a button to speak to somebody.
Live marketing/sales call	This is where there is a call centre agent at the end of the line when you answer the call, and who then tries to sell you something - for example, how to save money on your energy bill - or invites you to make a compensation claim, such as for an accident or payment protection insurance mis-selling.
Other	Any other type of nuisance call.

In addition, a nationally representative face-to-face omnibus survey among fixed landline owners was conducted towards the end of the panel research period (7-14 February 2013) asking experience of nuisance calls received in the last four weeks. Going forward, Ofcom will be using this methodology to report on incidence levels of nuisance calls.⁵

² The term 'unwanted calls' was used in the recruitment letter, instruction sheet and paper diary provided to respondents, as it was considered to be a clearer, more consumer-friendly term than 'nuisance calls'. In this report 'unwanted calls' are referred to as 'nuisance calls'.

³ Some calls recorded as nuisance calls may have been the result of respondents giving the company prior consent to contact them (e.g. ticking a consent box on a marketing form or company website)

⁴ Please see the previous section for more details of the methodology.

⁵ Please see Appendix 1 for a detailed comparison of the panel and omnibus results.

Frequency of nuisance calls:

- Four in five (82%) UK adults with a landline phone reported experiencing a nuisance call in the four week fieldwork period. Over half (54%) reported experiencing a silent call⁶, and an estimated 17% received an abandoned call⁷. Over three in five (64%) reported receiving a live marketing call and 38% reported experiencing a recorded sales call⁸.
- In terms of the proportions of different types of nuisance calls, over a third of total nuisance calls were live sales calls (38%) and a further third were silent calls (34%). Recorded sales calls (14%), abandoned calls (4%) and 'other' types of nuisance calls (8%) were at lower levels. A few (2%) nuisance calls were not categorised by respondents.
- Those who reported receiving any nuisance calls reported an average of about eight calls (8.4) in the four week period, which equates to approximately two calls per week. A quarter (26%) reported more than 10 nuisance calls over the four week period.
- Among all those who reported receiving them, silent calls and live sales calls were received most frequently: 53% of those who received silent calls reported receiving three or more of them over the four weeks (8% reporting more than ten calls) and 54% of those who received live sales calls reported receiving three or more over the four weeks (7% reporting more than ten calls). For each of silent calls and live sales calls this equates to an average of about four calls (4.2) over the four weeks.
- Approximately one in ten (12%) of those who reported receiving abandoned calls received three or more of them over the four weeks (an average of 1.9 calls in four weeks), and 34% of those who reported receiving recorded sales calls received three or more over the four weeks (an average of 2.7 in four weeks).
- A significantly higher level of nuisance calls was claimed by older (typically 55+) compared with younger respondents. In addition, among those who reported receiving nuisance calls, a higher average number of calls were reported among those aged 55+ and those not working (an average of 11 calls and 10 calls in the four weeks respectively) compared to younger and working adults (each an average of 7 calls in the four weeks). This is likely to be due at least in part to older and non-working respondents being more likely to be at home to receive nuisance calls. Those in socio-economic group AB reported a higher incidence of silent calls than those in socio-economic group C2.

Industries making nuisance calls:

- Respondents were asked, where possible, to record the name and number of the caller and the product or service being promoted. Respondents provided a description⁹ of the product or service being promoted for about two fifths (43%) of all nuisance calls, rising to over two-thirds of recorded sales (68%) and live sales calls (72%).

⁶ The results from this study are not directly comparable with results from the Ofcom Consumer Concerns Tracker, as they record reported experience of calls over different time periods.

⁷ Source: GfK Random Location Omnibus, 7-14 February 2013

⁸ Source: GfK Nuisance Calls panel study

⁹ This is the respondent's understanding of the product or service being promoted and may not reflect the actual reason for the call

- Calls about Payment Protection Insurance (PPI) claims made up 22% of all nuisance calls where respondents were able to provide a description of the product or service. This was followed by energy (10%), market research (10%) and insurance (8%). Amongst those who were able to identify the product or service, recorded sales calls were most likely to be regarding PPI claims (51%), energy (14%) or pension rebates (10%); for live sales calls the most common reasons for the call were also PPI (13%) and energy (10%), as well as insurance (11%). For marketing calls overall (both live and recorded) the figures were PPI claims 23%, energy 22% and insurance 8%. Amongst those who were able to identify the product or service, abandoned calls were also most likely to be regarding PPI (41%).
- The name of the company calling was recorded for a fifth (20%) of all calls; two fifths (41%) for live sales calls. The top 10 company name mentions only accounted for 6% of nuisance calls.
- The telephone number of the caller - either provided on the caller display or by dialling 1471 - was recorded for a third (34%) of calls; for the remainder of calls either no telephone number was available or it was not recorded.

Attitudes towards nuisance calls:

- The majority (86%) of nuisance calls of all types were considered to be annoying, but recorded sales calls were stated as annoying by higher proportions than all other types (94%); silent calls were the next most annoying type of nuisance call (89%). Those aged over 65 and retired people were less likely than others to say they were annoyed by nuisance calls.
- Whilst at relatively low levels in comparison to annoyance, silent (11%), abandoned (10%) and 'other' (8%) calls were stated as most worrying. People aged 55 and over were more likely than those aged 35-54, and unemployed people were more likely than those in paid work, to say they were worried by nuisance calls. Those aged 25-34, homemakers and unemployed people were more likely to say they found calls distressing.
- Calls about Payment Protection Insurance (PPI) and energy were stated as annoying by higher proportions than average across all nuisance calls (97% and 93%). Computer support calls were the most likely type of call to be stated as worrying (31%) or distressing (13%).
- There was little variation in attitudes to calls across the day, although calls before 9am and after 8pm were more distressing, and those after 7pm were more worrying.

Measuring incidence of nuisance calls

Four in five (82%) UK adults with a landline phone reported experiencing a nuisance call in the four week fieldwork period. Over half (54%) reported experiencing a silent call¹⁰, and an estimated 17% received an abandoned call¹¹. Findings from the panel identified that 38% of adults with a landline reported experiencing a recorded sales call and over three in five (64%) reported receiving a live sales call¹². It should be noted that some calls recorded as nuisance calls may have been the result of respondents giving the company prior consent to contact them (e.g. ticking a consent box on a marketing form or company website).

Comparison of nuisance call incidence

Figure 1.1 (below) shows a comparison of the incidence of different nuisance call types recorded by the omnibus study compared with those recorded in the panel study.

There was no significant difference in the overall incidence of nuisance calls between the omnibus and panel study (82% vs 83%). The overall incidences of silent calls (54% vs 57%) and abandoned calls (17% vs 15%) were also not significantly different between the omnibus and panel studies. However, the level of total live sales calls was higher in the omnibus study compared to the panel study (72% vs 64%).

The results show that, given that the overall levels of total nuisance calls, silent calls and abandoned calls were similar for both studies, an omnibus approach provides a robust measurement of experience of these key measures. However, the level of reported live sales calls was higher in the omnibus survey than the panel. A possible explanation for this could be that sales calls are more likely to be remembered, and therefore may be over-reported in a retrospective omnibus survey.

Figure 1.1: Comparison of nuisance call incidence

	F2F omnibus	Panel
All nuisance calls	82%	83%
Silent calls	54%	57%
Abandoned calls	17% (estimate) ¹³	15%
Recorded sales calls	n/a ¹⁴	38%
Live sales calls	72%	64%
Other nuisance call ¹⁵	n/a ¹⁶	28%

Base: UK landline owners (n=1614); UK landline panel respondents (n=853)
Source: GfK Random Location Omnibus; GfK Nuisance Calls panel study

¹⁰ The results from this study are not directly comparable with results from the Ofcom Consumer Concerns Tracker, as they record reported experience of calls over different time periods

¹¹ Source: GfK Random Location Omnibus, 7-14 February 2013

¹² Source: GfK Nuisance Calls panel study

¹³ The percentage of abandoned calls was estimated by asking respondents whether they had received a call with a recorded message, and if so whether they listened to the message and could say what it was about

¹⁴ Experience of recorded sales calls was not captured on the omnibus

¹⁵ Defined as "Some other type of call that you didn't want from someone you didn't know (please explain what this was), for example a survey or market research call"

¹⁶ Experience of 'other' nuisance calls was not captured on the omnibus

Demographic profile of nuisance landline call incidence split by call type

Figure 1.2 (below) shows the demographic profile of the omnibus respondents who reported having received nuisance calls across the four week period¹⁷.

Overall experience of nuisance calls increased with age, and those 35 years and over reported a significantly higher incidence of all types of nuisance calls compared with those under 35.

Figure 1.2: Demographic profile of nuisance landline call incidence, by call type

	Total	16-34 A	35-54 B	55+ C	ABC1 D	C2DE E
<i>Base size</i>	1,614	397	537	680	743	871
Any nuisance call	82%	70%	82% A	89% AB	83%	80%
Silent	54%	44%	54% A	61% A	55%	53%
Abandoned ¹⁸	17%	10%	22% A	18% A	17%	17%
Live sales	72%	58%	73% A	80% AB	74%	69%

A letter next to a percentage shows that the percentage is significantly higher (99% level) than the corresponding percentage for that call type (row) in the sub-group (column) of that letter

Base: UK landline owners

Source: GfK Random Location Omnibus

¹⁷ Please see Appendix 1 for a detailed comparison of the panel and omnibus results

¹⁸ The percentage of abandoned calls was estimated by asking respondents whether they had received a call with a recorded message, and if so whether they listened to the message and could say what it was about.

Panel results

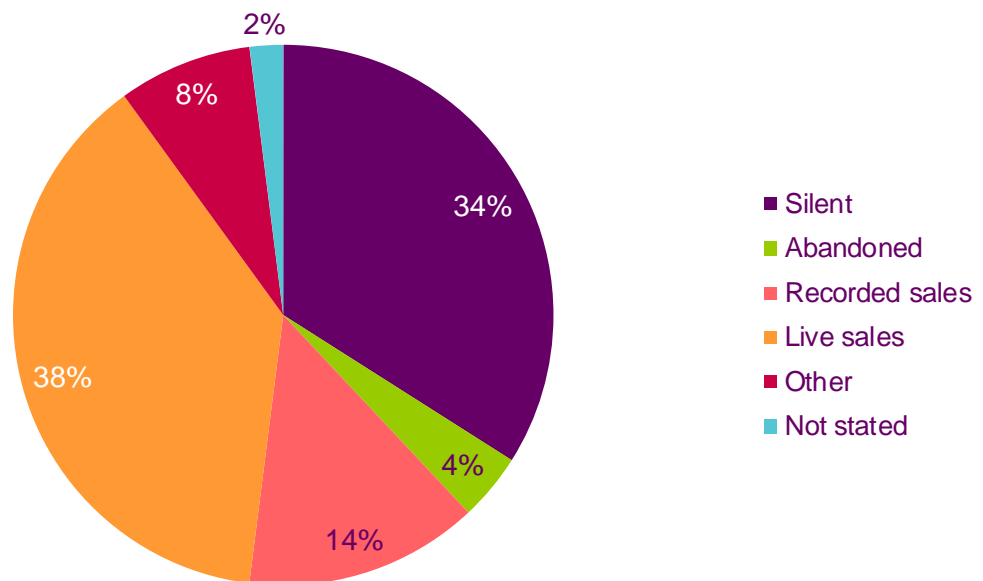
The panel survey provided the additional insight into areas that an omnibus survey cannot cover or may not be as accurate if collected via retrospective interviewing. The following sections report on findings from the panel study that explore the frequency of these types of calls, industries making them, the availability of callers' telephone numbers and company details and attitudes towards these calls.

Breakdown of nuisance landline calls by type

Figure 1.3 (below) shows the proportions of each type of nuisance call received out of the total nuisance calls received over the four week period.

Over a third of total nuisance calls were live sales calls (38%) and a further third were silent calls (34%). Recorded sales calls (14%), abandoned calls (4%) and 'other' types of nuisance calls (8%) were at lower levels. A few (2%) nuisance calls were not categorised by respondents.

Figure 1.3: Proportion of different types of calls received over four weeks



Source: GfK Nuisance Calls panel research, Jan-Feb 2013
 Base: All nuisance calls received by UK panel respondents with landline (n=6302)

Frequency of nuisance landline calls received across four weeks

Figure 1.4 (below) shows the number of calls received over the four week period by all who received each call type.

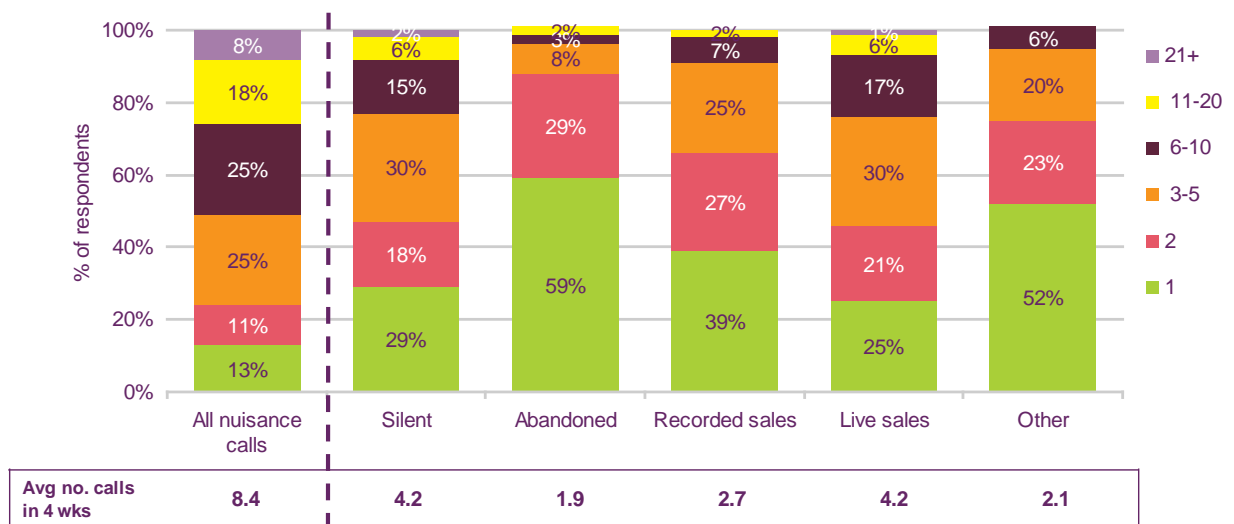
Those who received any nuisance calls received an average of about eight calls (8.4) in the four week period, or two per week. A quarter (26%) received more than 10 calls over the four week period, and less than one in ten (8%) received more than 20 calls over the four week period, or more than five a week.

Among all those who reported receiving them, silent calls and live sales calls were received most frequently: 53% of those who received silent calls reported receiving three or more of them over the four weeks (8% reporting more than ten calls) and 54% of those who received live sales calls reported receiving three or more over the four weeks (7% reporting more than ten calls). For each of silent calls and live sales calls this equates to an average of about four calls (4.2) over the four weeks.

In contrast, only 12% of those who reported receiving abandoned calls received three or more of them over the four weeks (an average of 1.9 calls in four weeks), and 34% of those who reported receiving recorded sales calls received three or more over the four weeks (an average of 2.7 in four weeks).

Amongst all who received any nuisance calls, those aged 55+ (10.9) and not working (10.4) reported significantly more calls on average over the four weeks compared to younger (16-34: 6.0; 35-54: 7.2) and working (6.8) adults.

Figure 1.4: Number of calls received over four weeks amongst all who received each call type



Base: All UK landline panel respondents who received each type of nuisance call (n=707, 489, 132, 322, 548, 242)
 Source: GfK Nuisance Calls panel study

Industries making nuisance calls

Availability of caller information

Panel respondents were asked to record the type of product or service, company name and telephone number where possible for each nuisance call received. Figure 2.1 (below) shows the proportion of nuisance calls in which respondents were able to identify details about the call; specifically, the type of product or service being promoted¹⁹, the name of the company that was calling, and the telephone number of the company calling.

Awareness of the product or service being promoted in the call and the name of the company calling were both a mixture of information provided by the caller and the respondent's recall or ability to hear the caller properly. The caller's phone number was usually determined either by the number display on the telephone or by the respondent dialling 1471 after the call.

Overall, in fewer than half of nuisance calls was a product or service (43%), company name (20%), or a phone number (34%) recorded.

Figure 2.1: Availability of caller information for total nuisance calls

	All nuisance calls
Base size	6302
Type of product or service	43%
Company name	20%
Company phone number	34%

NB: telephone numbers provided were not checked for accuracy

Base: All nuisance calls received on UK landlines

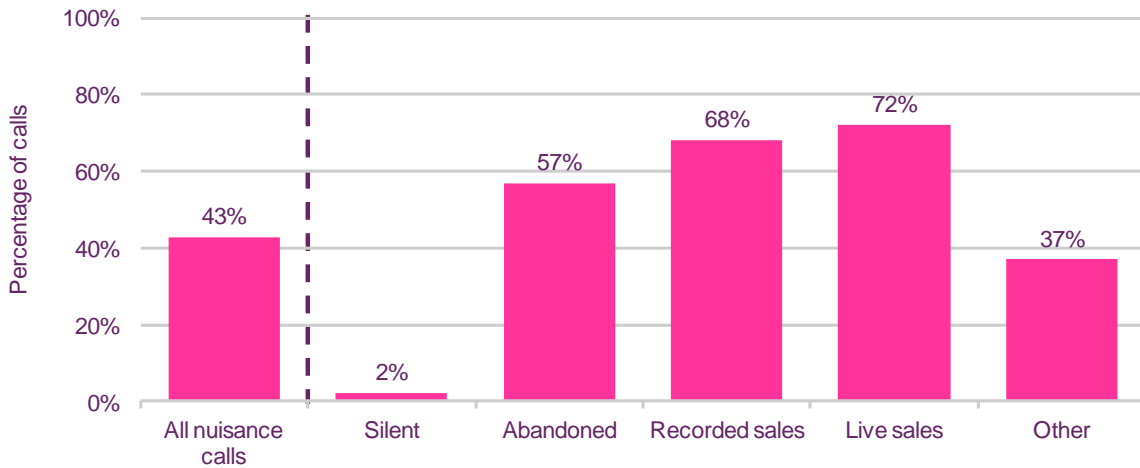
Source: GfK Nuisance Calls panel study

As shown in Figures 2.2, 2.3 and 2.4 (below) the level of information given differed by type of call; the product/ service and company name were naturally not generally available from silent calls (except very occasionally when determined by respondent from the telephone number).

Figure 2.2 (below) demonstrates the proportion of nuisance calls in which the type of product or service being promoted was recorded, by type of call. The type of product or service was mentioned in two thirds or more of recorded sales (68%) and live sales calls (72%), as well as in over half of abandoned calls (57%).

¹⁹ This is the respondent's understanding of the product or service being promoted and may not reflect the actual reason for the call

Figure 2.2: Proportion of nuisance calls in which type of product or service was recorded, by call type



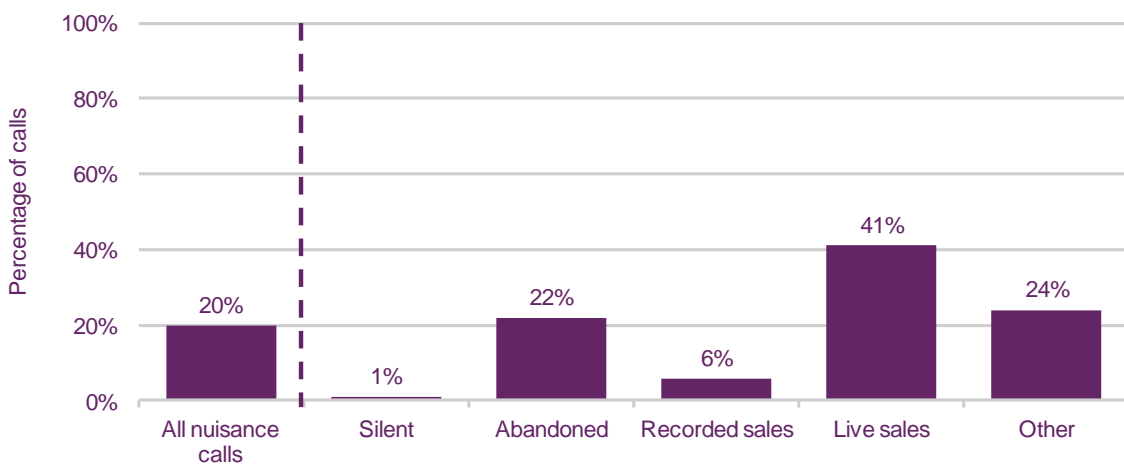
Source: GfK Nuisance Calls panel research, Jan-Feb 2013

Base: All nuisance calls received by UK panel respondents with landline (n=6302, 2116, 241, 882, 2377, 522)

NB: 2% of nuisance calls were not categorised by respondents

Figure 2.3 (below) shows the proportion of nuisance calls in which the company name was recorded, by type of call. Respondents receiving live sales calls were the most likely record the name of the company calling (41%); in contrast, respondents receiving recorded sales calls were very unlikely to obtain this information (6%).

Figure 2.3: Proportion of nuisance calls in which company name was recorded, by call type



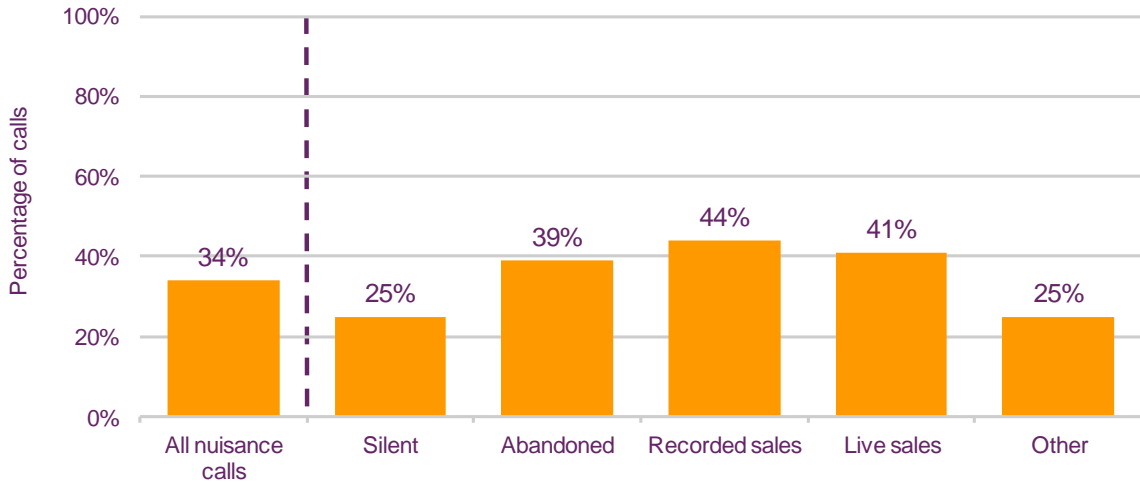
Source: GfK Nuisance Calls panel research, Jan-Feb 2013

Base: All nuisance calls received by UK panel respondents with fixed landline (n=6302, 2116, 241, 882, 2377, 522)

NB: 2% of nuisance calls were not categorised by respondents

Figure 2.4 (below) shows the proportion of nuisance calls in which the caller’s telephone number was recorded, by type of call. A telephone number was recorded for a third (34%) of all nuisance calls; recorded sales (44%), live sales (41%) and abandoned calls (39%) were more likely than silent (25%) or other calls (25%) to disclose a telephone number.

Figure 2.4: Proportion of nuisance calls in which phone number was recorded, by call type



NB: Telephone numbers provided or disclosed were not checked for accuracy

Source: GfK Nuisance Calls panel research, Jan-Feb 2013
 Base: All nuisance calls received by UK panel respondents with fixed landline (n=6302, 2116, 241, 882, 2377, 522)
 NB: 2% of nuisance calls were not categorised by respondents

Product or service being promoted where identified

Figure 2.5 (below) shows the proportions of nuisance calls that were promoting different products and services, for all calls where respondents were able to provide a description of the product or service being promoted. As discussed in Figure 2.1 respondents were able to provide a description of the product or service being promoted in about two fifths (43%) of all nuisance calls.

Overall, calls about PPI claims made up 22% of all nuisance calls where the product or service was identifiable, followed by energy (10%), market research (10%) and insurance (8%). PPI claims calls constituted over half (51%) of all recorded sales calls, four in ten (41%) abandoned calls and just over one in ten (13%) live sales calls, where the product or service was able to be identified.

Figure 2.5: Product or service being promoted by call type, where identified

	All identifiable calls	Silent **	Abandoned	Recorded sales	Live sales	Other
PPI claim	22%		41%	51%	13%	4%
Energy company	10%		6%	14%	10%	6%
Market research	10%		4%	1%	9%	50%
Insurance	8%		9%	2%	11%	2%
Pension rebate/ refund	4%		2%	10%	2%	-
Computer maintenance/ support	3%		1%	-	5%	6%
Phone/ Broadband	3%		1%	1%	4%	2%
Charity	3%		1%	-	4%	7%
Other home e.g. kitchen, windows	3%		-	-	4%	2%
Accident claims/ compensation	2%		-	1%	4%	1%
Solar panels	2%		-	2%	3%	-
Home/ Loft insulation	2%		-	1%	3%	-
Claim/ Refund (unspecified)	2%		4%	5%	1%	1%
Loans/ Loans refund	2%		15%	2%	1%	-
Debt collection	2%		3%	3%	1%	-
Banking/ Credit card	2%		4%	2%	1%	1%
Won holiday/money/cruise etc.	2%		1%	2%	2%	1%
Others	18%		8%	3%	22%	17%

** Base size below 50, too low for analysis

NB: This was the respondent's understanding of the product or service being promoted and may not reflect the actual reason for the call. Products and services constituting less than 2% of total calls were grouped into other and included the following: newspaper & magazine subscriptions, satellite TV insurance, other financial products, wine investments.

Base: All nuisance calls received on UK landlines in which product/service was able to be identified (n =2605, 45**, 142, 588, 1644, 187)

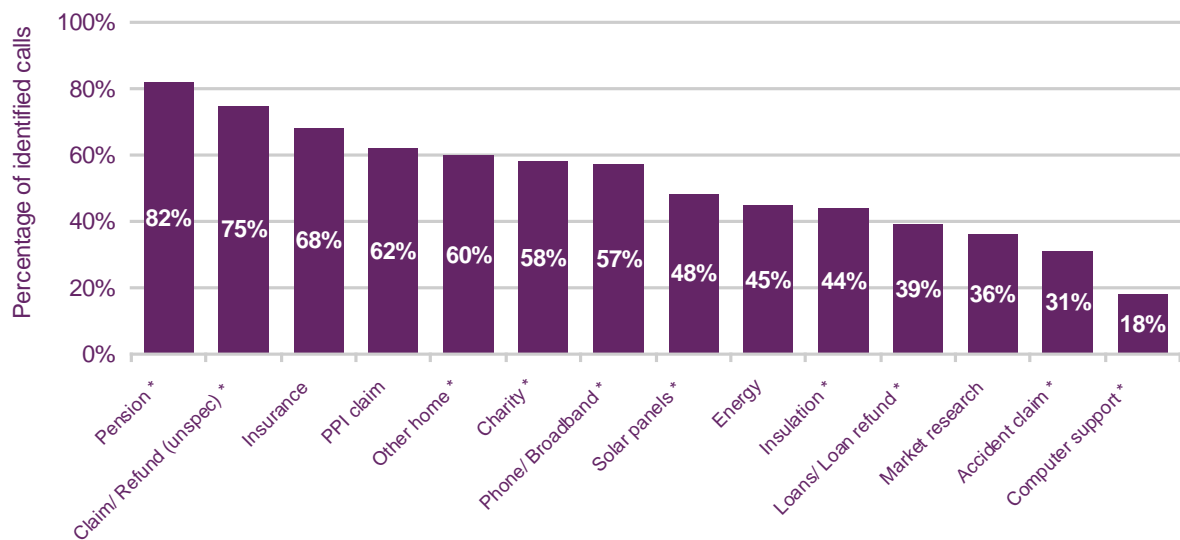
Source: GfK Nuisance Calls panel study

Disclosure of phone number by key products or services being promoted

Figure 2.6 (below) shows the proportions of nuisance calls that disclosed a telephone number²⁰, for calls in which the product or service being promoted was identified.

Amongst calls where the respondent was able to provide a description of the product or service being promoted (43% of all calls – see figure 2.1), those calls most likely to disclose a telephone number related to pension refund/entitlement (82%), claim/refund (unspecified product) (75%) and insurance (68%). Respondents receiving calls regarding computer support (18%) were least likely to be able to identify the caller's telephone number.

Figure 2.6: Proportion disclosed phone number by main types of product/ service promoted



* Base size below 100 - treat as indicative only

NB: This was the respondent's understanding of the product or service being promoted and may not reflect the actual reason for the call.

Base: All nuisance calls received on UK landlines where product or service was identified (n=93*, 59*, 210, 585, 77*, 77*, 84*, 63*, 269, 59*, 49*, 256, 64*, 89*)

Source: GfK Nuisance Calls panel study

²⁰ Availability of a telephone number for a call does not guarantee that this is a number that can be used to re-contact the caller

Attitudes towards nuisance calls

Attitudes to nuisance calls by call type

Figure 3.1 (below) shows respondents' attitudes to nuisance calls by type of call. Respondents were asked to use the following categories to describe their attitudes: 'annoying', 'worrying', 'distressing', 'useful' and 'not a problem'. It was a prompted list and respondents could select more than one response for a call (thus the totals may sum to more than 100%), although only occasionally was more than one attitude selected.

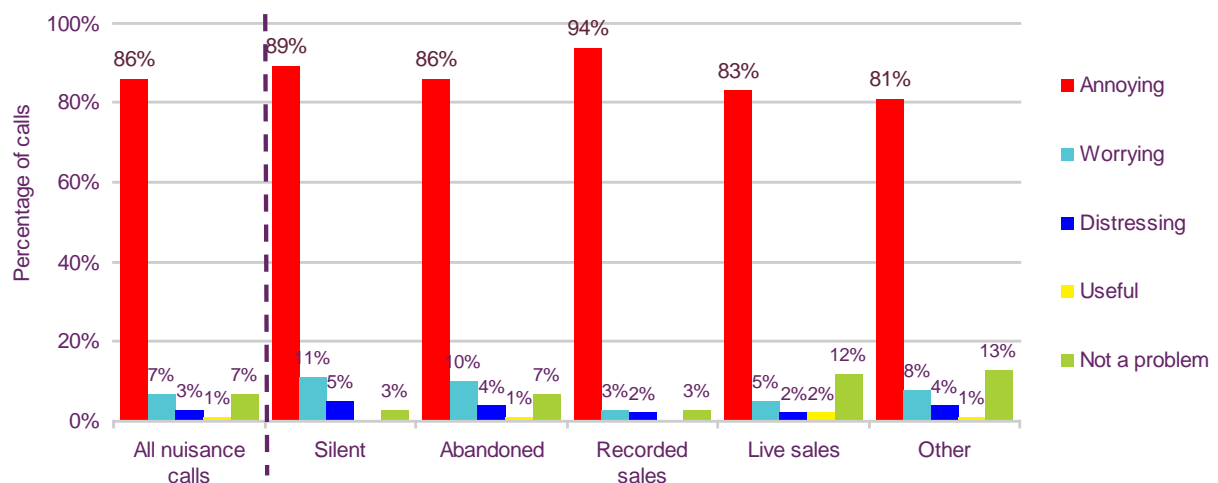
The majority of nuisance calls (86%) were considered to be annoying. Relatively few calls were reported as being worrying (7%) or not a problem (7%), and even fewer were considered distressing (3%) or useful (1%).

The feeling that these calls were predominately annoying dominates across all ages, socio-economic groups and working status. Although a relatively small proportion of calls made people feel worried, respondents aged 55+ (9%) and those unemployed (11%) were more likely than those aged 35-54 (5%) and those in work (6%) to report this.

Recorded sales calls (94%) were regarded as the most annoying followed by silent (89%) and abandoned calls (86%).

Although at relatively low levels in comparison to 'annoyance', silent calls were more likely to be worrying (11%) or distressing (5%) than recorded and live sales calls. Abandoned and 'other' calls were also more likely than sales calls to be worrying (10% and 8% respectively).

Figure 3.1: Attitude to nuisance calls by call type



Base: All nuisance calls received on UK landlines (n=6302, 2116, 241, 882, 2377, 522)

Source: GfK Nuisance Calls panel study

NB: 2% of nuisance calls were not categorised by respondents

Attitudes to nuisance calls by industry type

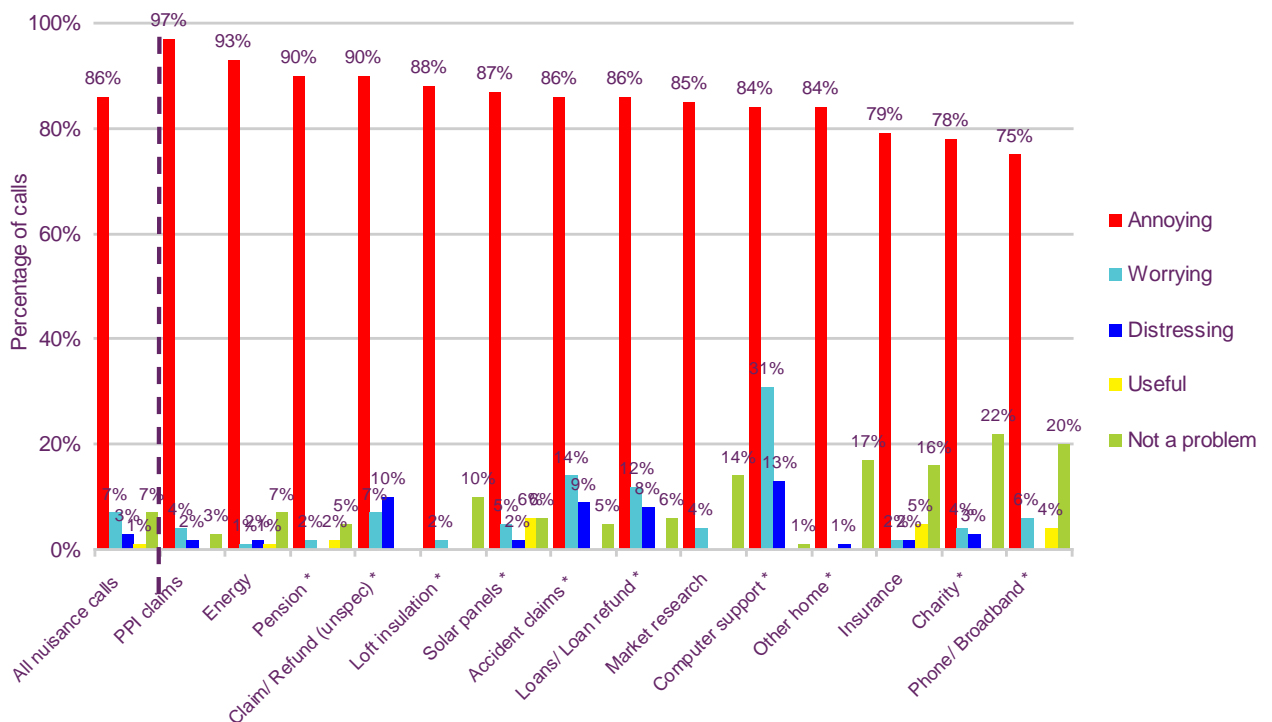
Figure 3.2 (below) shows respondents' attitudes to nuisance calls by the type of product or service that was being promoted, for calls where the product/service was identified.

The vast majority of nuisance calls were considered to be annoying, regardless of industry type. However, calls about Payment Protection Insurance (PPI) and energy were more likely to be rated as annoying compared with the average rating across all nuisance calls (97% and 93% vs 86% average). Calls regarding insurance, charities or phone/ broadband were less likely to be considered annoying (79%, 78% and 75% respectively).

Computer support calls were the most likely type of call to be rated as worrying (31%) or distressing (13%); these levels were significantly higher than the average for all nuisance calls (7% and 3% respectively). Calls regarding accident claims and claim/ refund (unspecified product) were also rated as distressing by higher proportions than average (9% and 10% respectively vs 3%).

Although at least three quarters of the calls were rated as annoying, some types were more likely than average to be reported as 'not a problem': specifically, calls regarding charities (22% of these were 'not a problem' vs 7% average), phone/ broadband (20%), home improvements e.g. kitchens, windows (17%), insurance (16%) and market research (14%).

Figure 3.2: Attitudes to nuisance calls by industry type



* Base size below 100 - treat as indicative only

NB: This was the respondent's understanding of the product or service being promoted and may not reflect the actual reason for the call.

Base: All nuisance calls received on UK landlines (n=6302) where product or service was identified (n=585, 269, 93*, 59*, 59*, 63*, 64*, 49*, 256, 89*, 77*, 210, 77*, 84*)

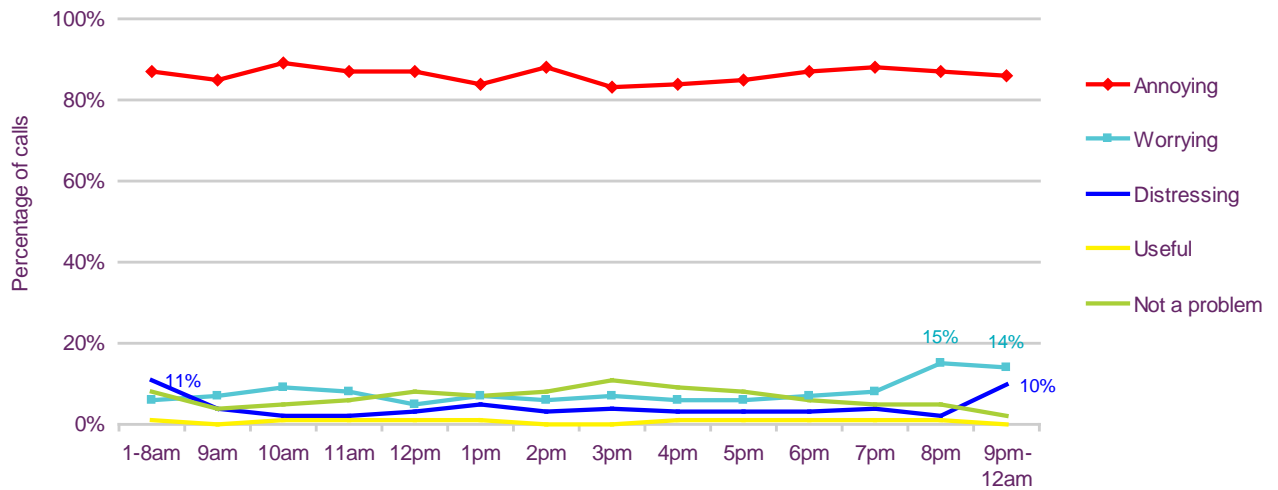
Source: GfK Nuisance Calls panel study

Attitudes to nuisance calls by time of day

Figure 3.3 (below) shows respondents' attitudes to nuisance calls by the time of day the call was received.

Over 80% of nuisance calls were rated as annoying at all times. Calls before 9am and after 8pm were more likely to be distressing, while calls after 7pm were more worrying. There was little variation in attitude across other times during the day.

Figure 3.3: Attitudes to nuisance calls across the day



Base: All nuisance calls received on UK landlines (n=6302)
 Source: GfK Nuisance Calls panel study

Notes on other panel study results

Live sales calls

Live sales calls received by panel respondents were differentiated by the respondent in terms of whether or not they had ever previously dealt with or had any relationship with the company calling; the two groups were labelled 'new companies' and 'known companies'²¹.

The main difference between the two types of sales calls were that the incidence of live sales calls from 'new' companies was more than twice as high as that of live sales calls from 'known' companies (60% vs 26%). Amongst those who received these two types of calls, the average number of calls received over four weeks was also twice as high for live sales calls from new companies (approximately one per week, compared with one a fortnight from 'known' companies).

Additionally, there was less difference by age in the incidence of receiving live sales calls from 'known' companies, while for live sales calls from 'new' companies there was a higher incidence amongst retired people and homemakers versus those in full time employment (70%/74% vs 51%). This is likely to be because live sales calls from known companies are more targeted than those from 'new' companies, and those who spend more time in the home are more likely to receive live sales calls from new companies just making calls from lists of telephone numbers.

As might be expected, the name of the company was more likely to be revealed or recorded when the call was from a 'known' company (65%) compared with those from 'new' companies (36%), as was the telephone number of the caller (52% from known companies vs 39% from 'new' companies).

²¹ A 'new' company' was defined as a company the respondent had not dealt with before, neither as a customer nor by having requested something from them previously. A 'known company' was defined as a company the respondent had dealt with before, either as a customer or perhaps by having requested information or a quote for work from them.

Appendix 1: Comparison between methodologies

Background

As noted in the Research Overview, one of the key objectives of this study was to understand whether accurate data on incidence of 'nuisance calls' generally and specifically 'silent calls' and 'abandoned calls' could be obtained via an omnibus study.

In order to compare the panel with the previous methodology used to track incidence levels, face-to-face omnibus research on nuisance landline calls was conducted in the second week of February, relating to the same four week period as the panel diary study.

The findings from these two methodologies were compared to enable Ofcom to understand whether a panel approach, which collected incidence in 'real time', produced a significantly different level of reported experience of nuisance calls compared to the retrospective omnibus approach. These findings informed Ofcom's decision on the most appropriate methodology to use going forward.

The results of the comparison

There were no significant differences between the omnibus and panel data in terms of the incidence of overall nuisance calls, silent calls or the estimated level of abandoned calls:

- both studies identified four in five (omnibus: 83%; panel: 82%) UK adults with a landline phone had experienced a nuisance call in the four week fieldwork period;
- over half of UK adults with a landline had experienced a silent call (omnibus 54%; panel; 57%);
- the estimated level of abandoned calls was very similar between the two studies (omnibus 17%; panel 15%).

Experience of total live sales calls was reported as higher via the omnibus compared to the panel (omnibus: 72%; panel: 64%): specifically, higher among those aged 25-34, in socio-economic group AB, and full-time working respondents. However, this did not impact on overall incidence of nuisance calls as noted above.

Whilst both studies produced a similar overall age trend, with reported experience of overall nuisance calls and each type of nuisance call increasing with age, there were some demographic differences between methodologies to be noted:

- non-working panel respondents reported higher levels of both overall nuisance calls and silent calls than non-working respondents in the omnibus research;
- panellists in socio-economic group DE reported higher levels of overall nuisance calls than those in the same socio-economic group in the omnibus survey.

There were also different patterns of call incidence noted across age group and working status between the two studies:

- the omnibus study reported a higher incidence of silent and abandoned calls amongst those aged 35+ while the panel suggested incidence was higher amongst those aged 55+;
- the omnibus study reported working adults were more likely to receive abandoned calls than non-working adults (19% vs 13%) while the panel suggested non-working adults were more likely to receive *all* types of nuisance calls.

However, these demographic differences did not have an impact on the overall incidence levels.

In conclusion, given the key measures of 'any nuisance calls', 'silent' and 'abandoned calls' were similar for both studies, we are confident that the omnibus approach provides a robust measure of incidence of these types of calls.

Specific benefits of the panel

The panel provided additional insight that an omnibus study could not cover or which might not be as accurate if collected via retrospective interviewing. This included information on industries making nuisance calls, the availability of the caller's telephone number and company details, and attitudes towards nuisance calls.

Appendix 2: Methodology

Methodology

Stage 1:

- A UK nationally representative sample of 1136 people with landline telephones in the home were recruited to participate in a diary study to record all nuisance calls personally received on their home landline phones across the four week period 14th January to 10th February 2013.
- To reflect the UK population, the panel was split by whether respondents used the internet or not; the online section of the panel was recruited from GfK's Media Panel - in line with national online access levels, this constituted the majority of the panel (83%). The offline segment of the panel (17%) was recruited face-to-face in-home.
- During recruitment, and also in the diary instructions to the recruited panellists, potential respondents were told that it didn't matter how many or few nuisance calls they received, but that we were just interested in obtaining a representative sample of UK landline users in order to accurately evaluate the incidence of these types of calls.
- Panellists were given a paper diary and instructions about how to complete it. They were asked to complete a page of the diary, in as much detail as possible, straight after each nuisance call that they personally received on their home landline telephone. The diaries were 40 pages in length and panellists were told that they could contact GfK to request further pages if required (an example of the diary page is shown in Appendix 4).
- The target diary completion level was n=800 respondents; the actual number of completed diaries was n=853. Data was weighted back to the UK nationally representative landline owning population by demographics and internet access.

Stage 2:

- A wave of face-to-face UK omnibus research was undertaken during 7-14th February, to obtain levels of recall of nuisance calls received in the last four weeks. This meant the data related to the same time period as that of the panel.
- The total sample size for the omnibus wave was 1917, of which 1614 had a home landline telephone. The questions relating to incidence of nuisance calls were asked of this subsample.
- This data was compared with the panel data in order to evaluate the accuracy of different methods of data collection regarding this issue.

Significant differences:

- For reporting purposes, differences are noted in the report only when they are significant – so if they are not mentioned there is no significant difference. Differences are noted within sub-groups e.g. age, rather than between sub-group and total sample. They have been reported at the 99% confidence level, meaning that we are 99% certain that there is a real difference between the two results; this is the most stringent standard test of significance.
- Whether or not a difference is significant is determined by the sample sizes of the two scores, and also by how close the two scores are to the average score; for example, the difference between two percentages needs to be greater the closer the percentages are to 50% in order to be significant. Additionally, the weighting of the data can have a slight impact on the significance testing.

Appendix 3: Panel sampling frame & quotas

Panel Sampling Frame (Landline owners)

		GfK Panel	Ofcom Quotas ²²		
			Total	Online	Offline
Gender	Male	48%	48%	41%	7%
	Female	52%	52%	42%	10%
Age	16-24	11%	11%	10%	0%
	25-34	16%	16%	16%	1%
	35-44	15%	36%	34%	2%
	45-54	21%			
	55-64	18%	37%	23%	14%
	65+	19%			
Working Status	Working full time (30+ hrs)	40%	40%	38%	2%
	Working part time (8-29 hrs)	18%	18%	16%	1%
	Not working - retired	22%	22%	12%	10%
	Not working - unemployed	5%	5%	4%	1%
	Not working - student	5%	5%	5%	0%
	Not working - housewife/ disabled/ other	10%	10%	8%	3%
SEG	AB	29%	29%	26%	2%
	C1	30%	30%	26%	4%
	C2	19%	19%	15%	4%
	DE	23%	23%	15%	8%
Region (GOR)	East Midlands	7%	7%	6%	1%
	Eastern	10%	10%	9%	1%
	London	12%	12%	10%	2%
	North East	4%	4%	3%	1%
	North West	10%	10%	9%	2%
	Scotland	8%	9%	6%	2%
	South East	15%	15%	13%	2%
	South West	9%	9%	8%	1%
	Ulster / Northern Ireland	3%	3%	2%	1%
	Wales	5%	5%	4%	1%
	West Midlands	8%	8%	6%	2%
Yorks & Humber	8%	8%	6%	2%	

²² Taken from the Ofcom Technology Tracker, Q1 2012

Appendix 4: Panel questionnaires

Recruitment questionnaire

	INTRODUCTION: Hello my name is from GfK NOP Research. We are conducting research on behalf of the Office of Communications (Ofcom) into unwanted calls. Unwanted calls can include silent calls, recorded messages left by companies, or marketing/sales calls. May I ask you a few questions? This will only take a few minutes.		
S6	Do you have a landline telephone in your home that you use to make and receive calls? SINGLE CODE	(54)	
	Yes	1	S7
	No	2	
	Don't know	3	CLOSE
S7	Do you or does anyone in your household have broadband internet access at home e.g. via a PC, laptop or tablet? SINGLE CODE	(55)	
	Yes, have access and use at home	1	ONLINE
	Yes have access but don't use at home	2	
	No, do not have access at home	3	OFFLINE
	Don't know	4	
S8	Thinking about your landline phone, in the last 6 months have you personally received a silent call? This means when you answer the call you hear silence - if a recorded message was heard, please do not count this as a silent call. SINGLE CODE	(56)	
	Yes	1	S9
	No	2	
	Don't know/can't remember	3	S10
S9	On average, how many silent calls does your household receive on the landline each month? SINGLE CODE	(57)	
	None	1	
	1	2	
	2	3	
	3	4	
	4	5	
	5	6	
	6-10	7	
	11-20	8	
	21-30	9	
	30+	10	
	Don't know/can't remember	11	S10
S10	We are looking for people to record a few details of any calls like this, and other types of unwanted calls, that they receive over a period four weeks in the new year. This research will help Ofcom to understand how many of these types of calls are occurring, and whether Ofcom needs to take any action regarding the companies making them. It doesn't matter how many or how few calls you receive, or if you receive none at all, we are just looking for a representative selection of UK households to participate. Would you be interested in taking part in this project? SINGLE CODE	(58)	
	Yes	1	S11
	No	2	CLOSE
S11	Can I just check if you are likely to be away from home for more than 5 days and nights during the period from 14 th January to 10 th February? SINGLE CODE	(59)	
	Yes	1	CLOSE
	No	2	INTRO
	Don't know	3	

INTRO	<p>Thank you for agreeing to help us with this research. We would like you to fill out details in this diary for each unwanted call you receive.</p> <p>Please note we are only interested in calls received on your home landline, and calls that are answered by you personally, and over the period 14th January to 10th February. We would like you to send the diary back to us as soon as possible after the 10th of February. We will send you a postage-paid, addressed envelope in early February that you can use to send us your diary.</p>		
S12	<p>Just to confirm, are you happy to take part? SINGLE CODE</p>	<p>(60)</p> <p>Yes 1</p> <p>No 2</p>	CLOSE
CL INTRO	<p>We would just like a few more details in order to classify the information we receive from you. Please note that your individual information will not be passed on to anyone, it will just be used to classify your responses.</p>		
CL1	<p>Which company does your household use to provide landline telephone calls? SINGLE CODE</p> <p>BT</p> <p>Sky</p> <p>TalkTalk</p> <p>Virgin</p> <p>Other (specify) _____</p> <p>Don't know/can't remember</p>	<p>(61)</p> <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p>	CL2
CL2	<p>Do you use a cordless landline phone at home? SINGLE CODE</p> <p>Yes</p> <p>No</p> <p>Don't know/can't remember</p>	<p>(62)</p> <p>1</p> <p>2</p> <p>3</p>	CL3
CL3	<p>Is your landline telephone number ex-directory, or are you registered with the Telephone Preference Service (TPS)? MULTI CODE (<i>The TPS is a free service that allows you to opt out of receiving unwanted sales or marketing calls</i>)</p> <p>Yes – ex-directory</p> <p>Yes – registered with TPS</p> <p>No, neither of these</p> <p>Don't know</p>	<p>(63)</p> <p>1</p> <p>2</p> <p>3</p> <p>4</p>	CL4
CL4	<p>Do you currently use a service or box to block unwanted calls e.g. Truecall or BT's anonymous call rejection service? MULTI CODE</p> <p>Yes, Truecall</p> <p>Yes, BT service</p> <p>Yes, other service (specify)</p> <p>No</p> <p>Don't know</p>	<p>(64)</p> <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p>	CL5
CL5	<p>In the last year, have you complained to Ofcom or the Telephone Preference Service (TPS) or to the Information Commissioner's Office (ICO) or to your landline provider about unwanted calls? MULTI CODE</p> <p>Yes, to Ofcom</p> <p>Yes, to the TPS</p> <p>Yes, to the ICO</p> <p>Yes, to landline provider</p> <p>No, none of these</p> <p>Don't know</p>	<p>(65)</p> <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p>	
	<p>Thank you for your time. Once again, please be assured that all your responses will be used anonymously. There are instructions in the front of the diary about how to use it.</p>		



Recruitment letter

January 2013

Dear Diary Panellist

Thank you for agreeing to take part in our research on unwanted calls - your participation is very much appreciated.

With this letter you will have received a diary in which we would like you to write down details of any unwanted calls you personally receive on your home landline phone between **Monday 14th January** and **Sunday 10th February**. Please also include any of these sorts of calls that you receive on your home answer phone during this period. The first page of the diary includes some more information about the types of calls we are interested in.

It doesn't matter how many or how few of these calls you receive, as long as you record the date, time and as many details as you can of all the ones you do get. We suggest that you keep the diary next to your landline phone so that you can write down the details straight away during or after any unwanted calls.

There is space in the diary to record around 40 unwanted calls. If you receive more than this over the four week period, it is important that you do continue to record them - just write down the call details in the same format on a separate piece of paper, or you can contact GfK and we will post you another booklet.

Once again, thank you for your participation.

Diary introduction

Dear Diary Panellist

Thank you again for agreeing to help us find out more about unwanted calls. It is very important that you write down as many details as you can about every unwanted call that you **receive yourself** on your **home landline telephone** (we are not interested in calls received by other people in your household, nor in calls to your mobile phone). Please also include any of these sorts of calls that you receive on your **home answer phone**.

It doesn't matter how many or how few of these calls you receive, as long as you record any you do get. The time period we are interested in is from **Monday 14th January to Sunday 10th February 2013** - please do not record any calls received before or after this time.

As you will see from the diary pages in this booklet, we have split out different types of unwanted calls that you might receive:

1. **Silent calls.** If you get a silent call where there seems to be no one on the line, *it is important that you do not put the phone down straight away. Please say something (for example, 'Hello') and then hold on for at least 5 seconds to see if a recorded message or person comes on the line.* If this doesn't happen then please record it as a silent call, even if you can hear someone talking in the background (but they are not talking to you).
2. **A recorded message saying that a company has tried to contact you,** but that when the call was put through there was no-one available to speak to you. There is nothing being sold or offered in this type of call.
3. **A recorded marketing/sales message,** which is a recorded message promoting a product or a service. The message may also ask you to press a button to speak to someone.
4. **A live marketing/sales call from a company you haven't dealt with before** - there is a real person trying to sell you something, but you are not a customer of this company and haven't requested anything from them previously.
5. **A live marketing/sales call from a company you have dealt with before** - there is a real person trying to sell you something but you are either a customer of this company or you have perhaps requested information or a quote for work from them before.
6. Some **other** type of call that you didn't want from someone you didn't know (please explain what this was), for example a survey or market research call.

For any call where a product or service was being offered, please write down what this was, if you can.

Diary page

UNWANTED LANDLINE CALLS DIARY

1. Date of call:

--	--	--

 (day) (date) (month)

2. Time of call:

--	--	--

 (hour) (minutes) am/ pm

3. Type of call (Tick one of the boxes and describe below)

Please see explanation on the first page of this diary if unsure of call type.

- Silent** (please say hello and wait for at least 5 seconds to make sure)
- Recorded message saying a company has tried to contact you**
- Recorded marketing/sales message trying to promote a product/ service**
- Live marketing or sales call** from a person on behalf of...
 - ... a company you **haven't** dealt with before
 - ... a company you **have** dealt with before
- Other** e.g. market research call (please write in)

4. Product or service being promoted or sold, if any: (Please write in)

5. Name of company calling: _____
 (You can ask for this if it is not given)

6. Phone number of caller: _____
 (Please call **1471** - for free - and write down phone number, if not given in call)

7. Feeling about call: (Please tick all appropriate)

- Annoying**
 Worrying
 Distressing
 Useful
 Not a problem

Please write in any other comment if you wish to:

Appendix 5: Omnibus

Omnibus sample frame

		Total sample	Landline owners
Gender	Male	49%	48%
	Female	51%	52%
Age	18-24	15%	12%
	25-34	17%	15%
	35-44	17%	17%
	45-54	17%	18%
	55-64	15%	15%
	65+	20%	23%
Working Status	Full time	42%	44%
	Part time	16%	16%
	Other	42%	40%
SEG	ABC1	50%	52%
	C2DE	50%	48%
Region (GOR)	East Midlands	7%	7%
	Eastern	9%	10%
	London	13%	13%
	North East	4%	4%
	North West	11%	11%
	Scotland	8%	8%
	South East	14%	13%
	South West	9%	9%
	Ulster / Northern Ireland	3%	3%
	Wales	5%	5%
	West Midlands	9%	9%
	Yorks & Humber	8%	8%

Omnibus questionnaire

S1	<p>ASK ALL WITH LANDLINE PHONE: I am now going to read out various issues. For each one, please tell me whether it has happened to you personally in the last four weeks. So, thinking about these issues related to landline phones, please tell me whether they have happened to you personally? Please mention all that apply. SHOW CODES 1-3 ONLY. MULTICODE FOR CODES 1-2 ONLY</p> <p>Receiving <u>silent calls</u> - this means when you answer the call you hear silence. If a recorded message was heard, please do not count this as a silent call</p> <p>Receiving <u>live marketing calls</u> - this is where there is a call centre agent at the end of the line when you answer the call, who then tries to sell you something - for example, how to save money on your energy bill - or invites you to make a compensation claim, such as for an accident or payment protection insurance mis-selling</p> <p>Neither of these</p> <p>Don't know/ Can't remember (DO NOT SHOW)</p>	1 2 3 4	S2
S2	<p>ASK ALL WITH LANDLINE PHONE: In the last four weeks, have you received a call on your landline with a <u>recorded message</u>? That is when pick up your landline phone and hear a recorded message, rather than someone on the end of the line. SINGLE CODE</p>	Yes 1 No 2 Don't know/ Can't remember 3	S3 END END
S3	<p>ASK ALL WHO HAVE RECEIVED RECORDED MESSAGES IN FOUR WEEKS (S2=1) And what do you usually do when you receive these recorded message calls on your landline? SHOW CODES 1-3 ONLY. SINGLE CODE</p>	Listen to the <u>full</u> message before hanging up 1 Listen to <u>some</u> of the message before hanging up 2 Hang up immediately, as soon as you realise it is a recorded message 3 Don't know/ Can't remember 4	S4 S4 END END
S4	<p>ASK ALL WHO LISTEN TO ALL/ SOME OF RECORDED MESSAGES (S3=1/2) In the last four weeks, which of the following types of recorded message have you received on your landline? SHOW CODES 1-4. ROTATE & MULTI-CODE STATEMENTS 1-3.</p>	Telling you about a product or service e.g. a cruise, debt advice or payment protection insurance claim), which may then ask you to press a button to speak to somebody 1 Telling you a company has tried to call you, but when the call was put through there was no operator available to speak to you 2 Telling you about a competition 3 Other (specify)_____ 4 Don't know/ Can't remember 5	