



Evaluation of Directory Enquiry Services

Ofcom/ICSTIS research

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Contents

| Section | | Page |
|----------------|--|-------------|
| Section 1 | Executive summary | 1 |
| Section 2 | Background | 5 |
| Section 3 | Perceptions and use of telephone DQ services | 7 |
| | DQ provider awareness and recognition | 7 |
| | Current use and change in usage patterns | 9 |
| | Self reported use of 118 services | 10 |
| | Satisfaction with DQ providers | 12 |
| | Influences on DQ service selection | 14 |
| | Consumer opinion on DQ liberalisation | 14 |
| | Prompted awareness of additional DQ services | 15 |
| | Use of additional DQ services | 15 |
| | Consumer requirement for comparable information | 17 |
| Section 4 | Performance of telephone DQ services | 18 |
| | Accuracy of telephone DQ services | 18 |
| | Changes in individual service accuracy levels between April 2004 and November 2004 | 19 |
| | Comparison of accuracy between DQ services | 20 |
| | Availability and performance of text-back service | 26 |
| | Availability of call connect service and provision of cost information | 27 |
| Section 5 | Cost comparisons of telephone DQ services | 30 |
| | Duration of calls to 118 numbers | 30 |
| | Costs and accuracy | 30 |
| | Perceptions of fixed and mobile DQ call costs | 37 |
| | DQ call costs: Perception vs reality | 39 |
| | Availability and costs | 39 |
| Section 6 | Methodology | 42 |
| Annex A | Additional cost and time tabulations from mystery shopping exercise | 50 |
| Annex B | Trend in 'specific accuracy' levels including error margins | 54 |
| Annex C | Trend in 'general accuracy' levels including error margins | 55 |
| Annex D | Consumer attitudes questionnaire | 56 |

Section 1

Executive Summary

While spontaneous awareness of DQ providers/numbers has fallen overall, it has increased amongst DQ users. Prompted awareness is unchanged

- Overall, spontaneous awareness of DQ providers fell from 60% in April to 53% in November.
- However, spontaneous awareness has increased amongst users of DQ services (up from 75% to 82%)
- Levels of prompted awareness remain unchanged (around seven in ten UK adults recognise at least one DQ number when prompted)
- The highest level of total awareness (spontaneous and prompted) for an individual provider is for 118 118 The Number (51%), followed by 192 (34%) and 118 500 BT (25%).
- All other DQ providers are mentioned by 10% or less of respondents.

Self reported use of DQ services continues to decline

- In May 2002 (seven months before liberalisation took place), self-reported use of DQ services was 69%. This had fallen slightly, to 66%, in October 2003. However, since then, the fall in DQ usage appears to have accelerated, falling nine percentage points to 57% in April 2004 and a further nine percentage points, to 48%, in November 2004¹.

Most consumers say that they are using one of two DQ providers – either The Number or BT – with advertising and ease of remembering the number being the key drivers of choice

- Over nine out of ten consumers only use one DQ number.
- The Number's 118 118 (41%) and BT's 118 500 (26%) are the two most commonly used DQ providers.
- Most consumers (62%) are satisfied with their chosen provider. A minority (12%) are dissatisfied.
- Mobile customers are more satisfied than fixed customers (77% and 62%).
- BT 118 500 landline users are more satisfied than landline users of The Number's 118 118 (Fixed line: 73% vs 62%)
- The main reasons mentioned for using a particular DQ provider are:
 - **advertising** recall (24%)
 - ease of **remembering the number** (17%)
 - **perception** that the number used was the new **BT service** (17%)
 - it is the **only known service** (16%)
- The service provision itself is a secondary consideration:
 - cheap (3%)
 - the best (4%)
 - accurate (2%)

¹ As stated these are self reported figures on usage and may not accurately reflect actual call volumes to 118 providers. In future research, Ofcom and ICSTIS will seek to analyse network traffic data to form a more precise view of the size of the market.

Accuracy of 118 DQ services broadly unchanged

- Levels of 'specific accuracy' and 'general accuracy' for DQ services remain broadly at the same level as April. 'Specific accuracy' is 86% in November vs 87% in April 2004 and 'general accuracy' levels are slightly higher at 88% in November versus 89% in April.
- Five DQ services have improved since April - one is showing indications of a decline in accuracy, the remaining 24 are stable².
 - The highest levels of this measure of accuracy were registered by the two Welsh language services (118 888 Welsh and 118 404 BT Welsh) at 98% and 96% respectively.
 - The biggest fall in accuracy is recorded by 118 500 (BT), down 10 points from 93% to 83% between April and November.
- The DQ services providing the best value for money i.e. those with the highest levels of overall accuracy and having the lowest call charges (taking into account the call length) are 118 848 (Conduit) and 118 355 (11 88 66 Ltd).

DQ prices – a significant minority of consumers do not know what they are being charged, just over half are aware that prices vary between DQ providers

- 41% of fixed line DQ users do not know what their chosen DQ provider charges to provide a UK telephone number.
- Among those that mention a price, the average is 48p – close to the actual weighted average price of 50p.
- Just over a half of UK adults are aware that prices vary between DQ providers, and just over a third that some DQ providers offer different services to others – unchanged since April 2004.

Of the additional services provided, none show growth in self-reported usage but consumers do show more potential interest in future usage of these

- Almost half (46%) of consumers are aware of DQ providers offering additional services (a small but steady increase since April 2004 – 41%). The highest levels of awareness are for text-back and call connect (24% each – little change since April 04).
- Awareness of text-back is significantly higher amongst those who use their mobile to call a DQ provider (73%).
- Awareness of other services remains low in comparison.
- Text-back (used by 12% of mobile users) and call connect (6%) are the most frequently used additional services.
 - Consumers do not have a good understanding of the costs associated with these additional services, e.g. one in ten consumers is aware that text-back is free.
- However, use of these services in the future shows potential for growth with 17% of UK adults saying they are likely to use text-back in the next 12 months, broadly similar to April 2004 (20%). Likelihood to use call connect in the future currently stands at 15% of UK adults and remains unchanged since April 2004.

² Results that are referred to as statistically significantly different have been tested at the 99% confidence level

A third of consumers say they would use information comparing DQ services

- Those likely to use such information said they would like to get the information in the following ways:
 - phone book (34%)
 - the internet (25%)
 - leaflet – either generally or with a phone bill (20%)
 - Ofcom/ICSTIS/Regulator is mentioned by a small proportion (2%)
- Younger consumers and AB social grades are the most likely users of this information.

118 versus 192

Quality of service – polarised views

- Equal numbers of consumers (four in ten) believe that the current 118 services are either the same as, or worse than, 192. One in ten say they have seen an improvement.

Usage of 118 - consumers say they are using 118 less frequently than 192 mainly because of “cost”. Around one in five of those using DQ services less, thought 192 used to be free

- An increasing number of consumers are saying that they use 118 DQ services less frequently than 192 (35% in November vs 26% in April). 1% say they are using DQ services more frequently.
- Those who say they are using DQ services less frequently/not at all say it is because of the following reasons:
 - “cost”, including those saying the new services are **too expensive** (51%)
 - they thought the **192 service used to be free** (19%)
 - they have difficulty in **remembering the new numbers** (16%)
- For these consumers, other sources of information have become more popular:
 - phone book (67%)
 - the internet (20% - including 14% using it generally to find telephone numbers and 7% using specialist on-line directory enquiry services)
 - personal records (11%)
- Most (84%) are satisfied with their alternative source of information.

Consumers perceive 118 to be more expensive on average than 192

- 118 numbers are perceived to be more costly per call than 192 (57% fixed line users/44% mobile users), especially in the case of fixed line calls. This is in part driven by a perception amongst consumers of calls to 192 being cheaper than they actually were (perceived cost to call 192 being 30p compared to the actual cost of 40p).

| Average <u>perceived</u> cost to call... | | |
|--|------------|------------|
| | 118 | 192 |
| Fixed line | 48p | 30p |
| Mobile phone | 59p | 57p |
| Actual average weighted price from fixed line on the BT network | 50p | 40p |

Consumers' general opinion on DQ liberalisation is mixed - while a large minority can see benefits to competition, the majority do not find a benefit in level of choice provided and/or find the level of choice confusing

- A choice of DQ providers is **not** seen as a benefit by most consumers as they only use one number (66%). Two-thirds of consumers agree with the statement 'I do/will only call one number for directory enquiries, so having a wide choice of numbers and 118 directory enquiry services is not important to me'.
- Almost seven in ten say they find the level of choice in the DQ market confusing.
- On the other hand around four in ten agree that competition in DQ will lead to a driving down of costs and to improvements in the quality of services provided and one in four agrees that the extra services will be really useful to them.

Section 2

Background

- 2.1. It is over two years since the liberalisation of the telephone directory enquiry (DQ) market (December 2002), when services on the new 118 XXX numbers began operating in parallel with the legacy 192 and 153 numbers, and 18 months since the legacy services ceased. During that time, there has been a significant level of attention and criticism from the media, consumer groups and the public.
- 2.2. One of Ofcom's key operating priorities in its 2004/05 Annual Plan was to carry out further monitoring and review of the performance of 118 DQ services in conjunction with the Independent Committee for the Supervision of Standards of Telephone Information Services (ICSTIS). Ofcom and ICSTIS carried out a mystery shopping exercise and consumer research in April 2004 and concluded that while at that stage there was no need to introduce further regulatory measures, they would undertake a similar exercise later in 2004 to provide the opportunity to compare performance and examine any trends on a like-for-like basis. There have now been three surveys of the DQ market, with the mystery shopping exercises in the two most recent surveys having been conducted using the same methodology.

Mystery shopping exercise and consumer research, October 2003

- 2.3. In October and November 2003, Oftel and ICSTIS carried out a preliminary evaluation of the impact of DQ liberalisation, assessing the usage, quality and delivery of the new services. As well as the core service of providing telephone number information, the research looked at a range of additional services, for example number text-back and onward call connection. The report, *Evaluation of Directory Enquiry services*³, covered the results of both a mystery shopping exercise and a consumer awareness survey. Overall, it found that in 62% of DQ requests made during the study correct information was given by the 30 DQ providers included.

Mystery shopping exercise and consumer research, April 2004

- 2.4. Early in 2004 Ofcom and ICSTIS repeated this research. While the October 2003 research had examined the value-added services such as text-back and onward call connection, these did not raise any particular significant issues. Therefore Ofcom and ICSTIS took the decision that accuracy and pricing of calls to provide standard residential and business UK numbers should provide the main focus of the report on the April 2004 research. This report⁴ showed that across the market, 87% of requests to DQ providers resulted in accurate information. The methodology takes into account the "real world" by weighting the data according to the known profile of calls to DQ providers in terms of the relative frequency of requests for business and residential numbers, differing lengths of requests, and estimated market shares based on information supplied by DQ providers.

³ <http://www.ofcom.org.uk/static/archive/oftel/publications/consumer/2003/dqresearch1103.pdf>

⁴ http://www.ofcom.org.uk/research/consumer_audience_research/telecoms/dq_report

Mystery shopping exercise and consumer research, November 2004

- 2.5. As with the research conducted in April 2004, this research was a joint venture between Ofcom and ICSTIS, and comprised two phases of research conducted between October and November 2004.
 - mystery shopping assessing the quality and delivery of DQ services and suppliers, conducted by MORI; and
 - residential consumers' use of, and attitudes towards DQ services, conducted by MORI⁵
- 2.6. The October/November 2004 mystery shopping exercise included a survey of the accuracy of text-back, and the provision of charging information from call connect services for those providers which offered these services.
- 2.7. The methodology of the mystery shopping research is the same as that used in April 2004, so for the first time allows the accuracy of providers to be directly compared. A separate survey which examined residential consumers' usage and attitudes to DQ services was also conducted.
- 2.8. The following report covers:
 - Current use and change in usage patterns
 - Awareness, opinion and experiences of 118 services
 - Use of additional DQ services
 - Accuracy comparisons across providers
 - Changes in accuracy levels
 - Cost comparisons across providers

⁵ See methodology section for further details on both the mystery shopping exercise and the consumer study

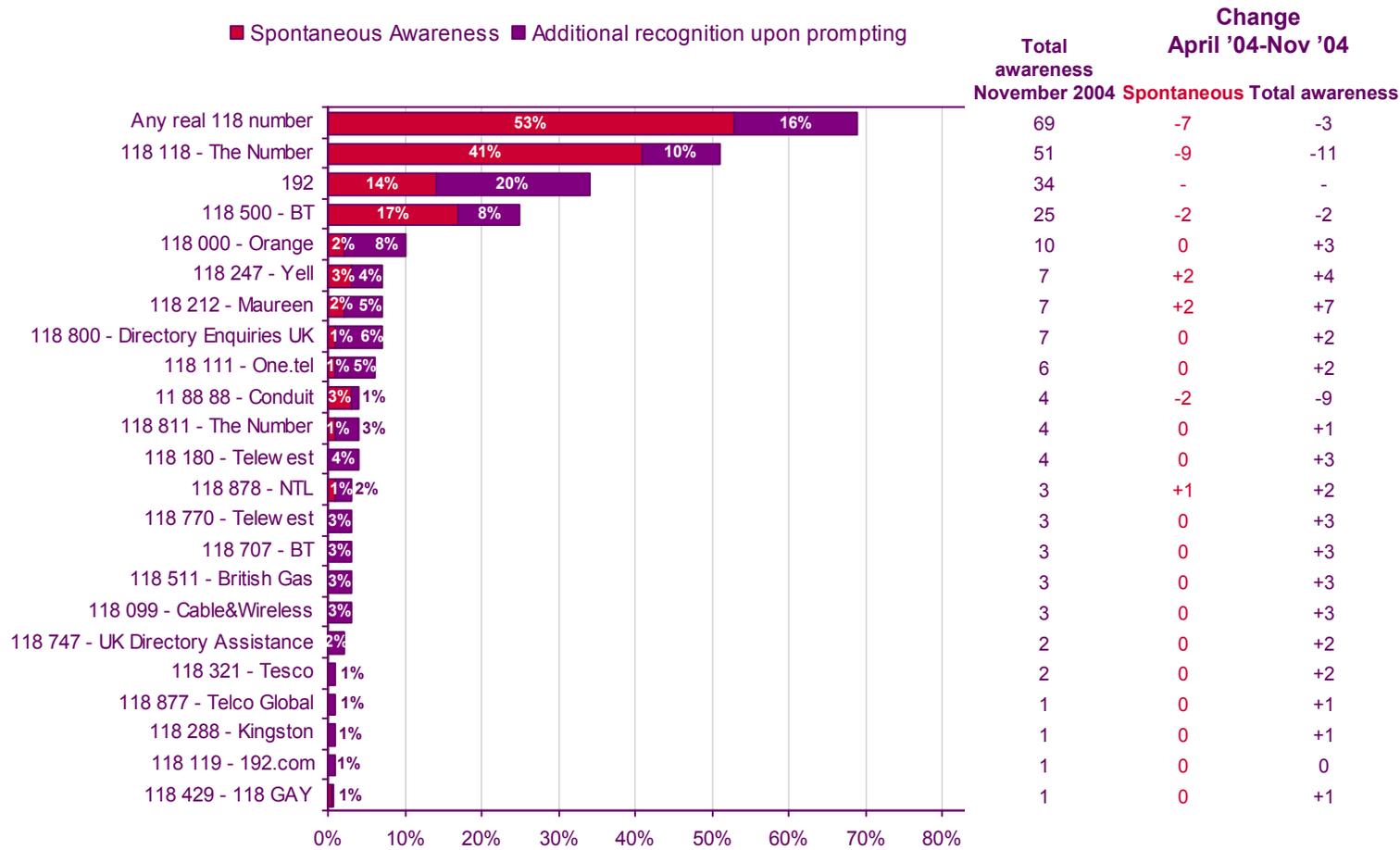
Section 3

Perceptions and use of telephone DQ services

DQ provider awareness and recognition

- 3.1 Around half (53%) of UK adults can spontaneously recollect a genuine “118” number, down from 60% in April (see figure 1). However, spontaneous awareness has increased amongst users of DQ services (up from 75% to 82%).
- 3.2 118 118 The Number (41%) has the highest level of spontaneous awareness amongst UK adults followed by BT’s 118 500 (17%), 118 247 Yell (3%), 118 888 Conduit (3%), 118 000 Orange (2%) and 118 212 Maureen (2%). The old 192 number is spontaneously mentioned by one in seven (14%).
- 3.3 Seven in ten (69%) UK adults recognise at least one DQ number when prompted (broadly unchanged since April 2004). Overall (spontaneous and prompted) recognition remains notably highest for 118 118 The Number (51%). 192 follows in second place, mentioned by 34% of UK adults. BT’s 118 500 DQ service is mentioned by around a quarter of respondents. Substantial minorities recognise 118 000 Orange (10%), 118 247 Yell (7%), 118 212 Maureen (7%), 118 800 Directory Enquiries UK (7%), and 118 111 One.tel (6%). Although total awareness (including prompted recognition) of 11 88 88 Conduit is relatively low (at 4%), it is fourth most likely to be spontaneously mentioned (3% of UK adults do so).
- 3.4 Total awareness (spontaneous and prompted) is less than 1% for the following DQ numbers: 11 88 66 (11 88 66 Ltd), 118 848 (Conduit), 118 499 (Share Charity), 118 453 (Freedom), 118 404 (BT Welsh), 118 355 (11 88 66 Ltd), 118 114 (Opal) and 118 080 (Simunix).
- 3.5 The BT phonebook is the main source where people say they have, or will, look for information about the new DQ numbers, mentioned by a fifth. The internet, Yellow Pages and television advertising are the only other major sources of information; all three are mentioned by around one in ten. Use of BT’s phonebook to source information on DQ services does not appear to have had an impact on awareness of a specific provider - awareness of 118 118 (The Number) and 118 500 (BT) amongst these consumers is similar to the awareness in the population as a whole (49% and 27% respectively).

Figure 1. Spontaneous and prompted awareness of DQ providers⁶
 Chart excludes those mentioned by less than 1%

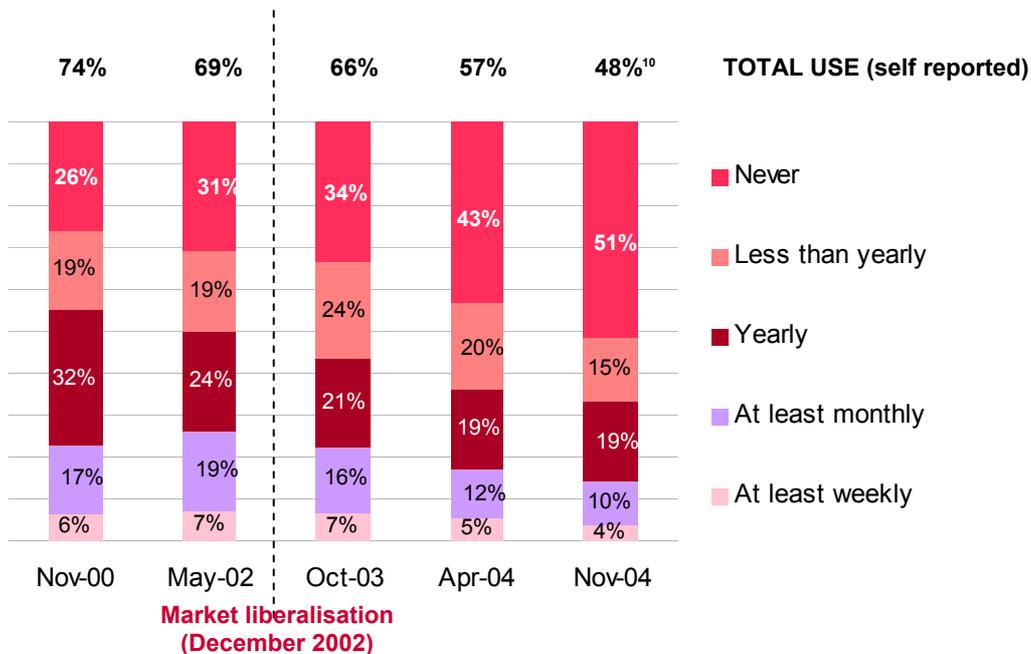


⁶ Base: All (2,122 UK adults 15+), November 2004, MORI survey

Current use and change in usage patterns

3.6 Self-reported⁷ use of telephone DQ services has continued to fall: just under half (48%) of UK adults say that they use National DQ services compared to 57% in April 2004, and two-thirds of GB adults in October 2003⁸. The fall in use appears to have accelerated following liberalisation, as illustrated in figure 2.

Figure 2. Proportion of adults saying they use national telephone DQ services⁹



3.7 Most of those adults who do use national DQ services do so infrequently. Regular users (those calling a DQ provider at least monthly) account for a third (35%) of DQ users, and equate to 14% of all adults.

3.8 Most users of national DQ services call primarily from a fixed line phone (70%) while 15% call mainly from their mobile. The remainder use both (15%).

3.9 When asked if their usage of national DQ services has changed since the introduction of 118 services, around a third (35%) say they are now calling DQ services less frequently (compared to 26% in April 2004). Almost half (47%) now feel their use of DQ services has remained steady (down 10 points since April 2004). 1% say they are calling DQ providers more often. Older consumers (aged over 55) were amongst those most likely to say they now use DQ services less frequently than 192, or not at all.

3.10 Perceptions concerning cost are mentioned as the main reason for lower use of DQ services:

- in total, 51% cite “cost” for less frequent use;

⁷ As stated these are self reported figures on usage and may not accurately reflect actual call volumes to 118 providers. In future research, Ofcom and ICSTIS will seek to analyse network traffic data to form a more precise view of the size of the market.

⁸ The survey conducted in October 2003 by Ofel was amongst a representative sample of GB adults, all other surveys were conducted amongst UK adults

⁹ Columns do not always total 100% due to rounding

¹⁰ Base: All (2,122 UK adults 15+), November 2004, MORI survey

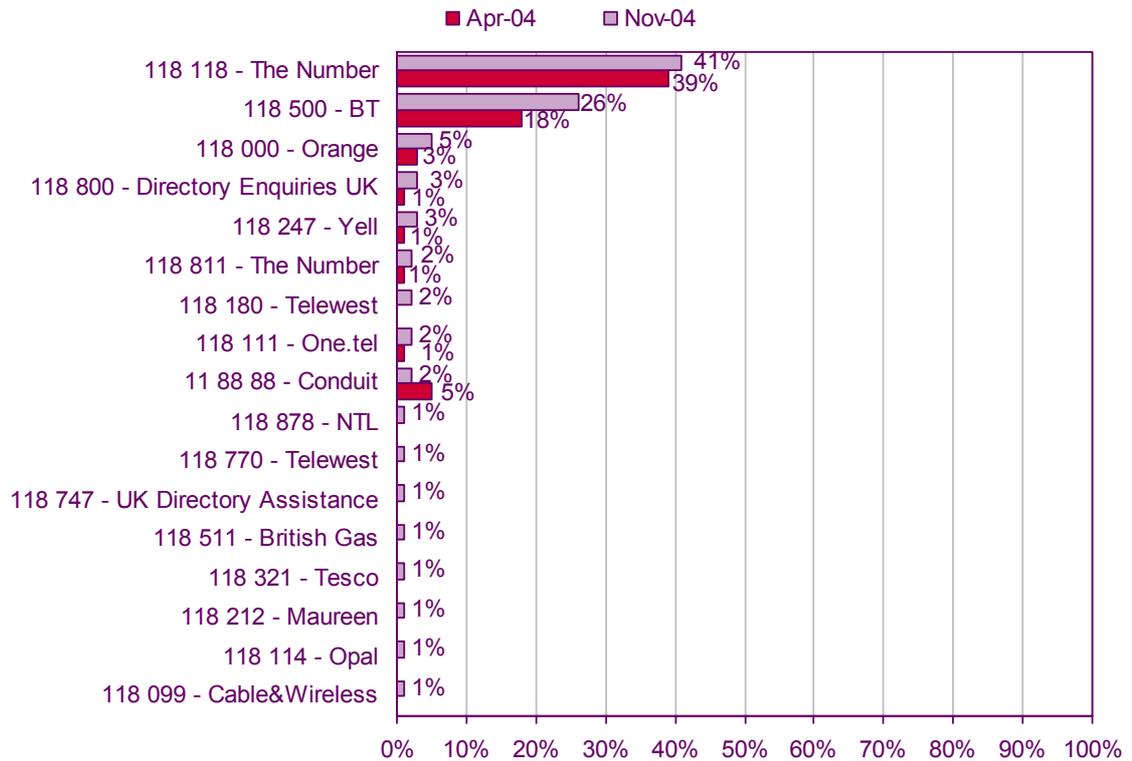
- 38% of those using the services less frequently say 118 operators are too expensive;
 - 19% say that they use DQ services less now as they thought the 192 service used to be free (in reality this was not the case, calls to 192 from a BT line used to cost 40p per call).
- 3.11 Other than price, remembering the new numbers is the next most frequently cited reason for calling directory enquires less frequently (16%).
- 3.12 Other sources of information are popular amongst less frequent users of DQ services. Two-thirds (67%) use the phonebook to look for telephone numbers instead of using DQ services. The internet (20%) including specialist internet directories (7%), and personal records (11%) are the next most frequently mentioned alternatives.
- 3.13 These 118 alternatives are highly regarded as well as popular: over eight in ten (84%) are satisfied with their main alternative method¹¹ and 5% are dissatisfied.
- 3.14 For the 1% of UK adults who claim to use DQ services more frequently this is largely to take advantage of new services such as text-back or call connect, or for better service generally.

Self reported use of 118 services

- 3.15 The Number's 118 118 is the most commonly mentioned service, 41% of users of DQ services say they have called this service in the last 12 months. In line with awareness, BT's 118 500 is the next most frequently mentioned number with a quarter of users claiming to have called it, illustrated in figure 3, up 8 points since April. This is the largest self-reported increase in use of any DQ service tested.

¹¹ Where satisfaction is reported this is calculated by adding "very satisfied" and "fairly satisfied" responses

Figure 3. Trend in self-reported use of 118 directory services from fixed or mobile, multi-coded¹²



Fixed line calls to national DQ services (70% of users call mainly from a fixed line)

3.16 Of those consumers calling from a fixed line phone, 118 118 (The Number) and BT (118 500) are the service providers most consumers say they have called (35% and 22% respectively). The next most frequently mentioned 118 service providers are: 118 800 (Directory Enquiries UK) used by 3% of consumers calling from a fixed line phone, 118 247 (Yell), 118 111 (One.Tel), 118 000 (Orange) and 118 811 (The Number) each used by 2%.

3.17 Most (94%) consumers calling from a fixed line tend to use only one provider. Around one in ten say they have used at least one other provider but have selected a ‘main provider’; the remainder made this selection without a comparison. In total, 17% of DQ users have called more than one provider in the last 12 months.

Mobile calls to national DQ services (15% of users call mainly from a mobile)

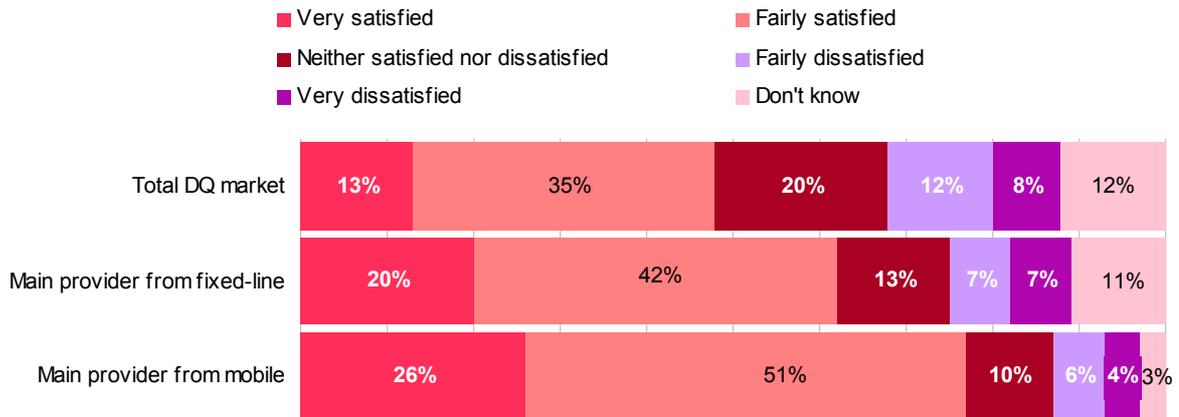
3.18 The Number’s 118 118 (45%) and BT’s 118 500 (33%) are the service providers consumers most commonly said they called amongst those who use mobiles to call directory enquiries. 118 000 Orange is the third most popular provider, used by one in six (16%) in the last 12 months. Similarly to those consumers who mainly call DQ from fixed lines, most of these customers (90%) have selected a ‘main provider’.

¹² Base: 983 UK adults (15+) saying they use a national UK directory enquiry service, November 2004, MORI survey – consumers may have called more than one 118 number

Satisfaction with DQ providers

- 3.19 Over six in ten (62%) consumers calling from a fixed line that use one DQ provider most often, are “very” or “fairly” satisfied with their overall service, with the levels of dissatisfaction low in comparison – around one in eight (12%), illustrated in figure 4 below.
- 3.20 Among consumers that mainly call DQ services from their mobile, satisfaction with their chosen provider is higher (77%) than amongst fixed line callers (62%) - with similar levels of dissatisfaction (10% for mobiles and 14% for fixed-line), illustrated in figure 4.
- 3.21 More generally, satisfaction with 118 providers amongst consumers of DQ services is divided. While almost half are satisfied (13% are ‘very’ satisfied) a fifth are dissatisfied (8% are ‘very’ dissatisfied).

Figure 4. Overall satisfaction with DQ services, compared to satisfaction with 'main providers' amongst fixed and mobile DQ customers¹³



3.22 Where the sample sizes are large enough, comparisons can be made between levels of satisfaction with the service offered by individual DQ providers illustrated in figure 5. Those who have chosen BT's 118 500 as their main DQ provider from a fixed line are more satisfied than those who have chosen 118 118 (The Number) - 73% and 62% respectively. Among those calling mainly from a mobile, while presentationally one appears to gain higher levels of satisfaction, these are not statistically significant; and in summary over three-quarters of respective customers to each are satisfied.

Figure 5. Satisfaction with user's main DQ provider from fixed line and mobile¹⁴

| DQ No. | Very/ fairly satisfied with main provider | Very/ fairly dissatisfied with main provider |
|---|---|--|
| <i>Calling mainly from a fixed line</i> | | |
| Overall | 62% | 14% |
| 118 500 – BT | 73% | 11% |
| 118 118 – The Number | 62% | 18% |
| <i>Calling mainly from a mobile</i> | | |
| Overall | 77% | 10% |
| 118 500 – BT | 82% | 6% |
| 118 118 – The Number | 77% | 8% |

¹³ Base: 742 UK adults (15+) using any 118 national DQ services, 565 UK adults (15+) using one main number from fixed line, 118 UK adults (15+) using one main number from mobile, November 2004, MORI survey

¹⁴ Base: All UK adults (15+) using each provider from fixed line: Overall: (565), 118 500: (185), 118 118 (286) and all UK adults (15+) using each provider from mobile: Overall: (118), 118 500: (40), 118 118 (57), November 2004, MORI survey

Influences on DQ service selection

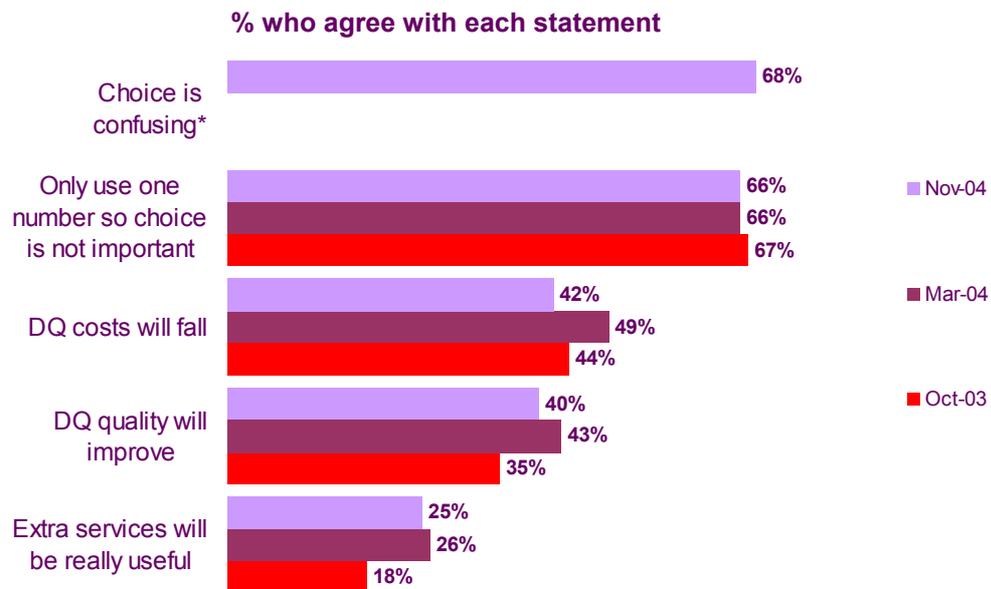
3.23 For both fixed-line and mobile customers, the rationale behind the decision to use any single provider is the same: advertising recall (24%), ease of remembering the number (17%), perceiving (in some cases correctly) that the number was the new BT service, (17%) or the fact that it is the only service they know of (16%). The quality of the service provision itself in terms of being “best” (4%), “cheap” (3%) or “accurate” (2%) is very much a secondary consideration.

Consumer opinion on DQ liberalisation

3.24 While four in ten users of national DQ services consider the current level of services consistent with 192, the same proportion feels DQ services have deteriorated. Just under one in ten (8%) say they have seen improvement. The remainder was unsure (12%).

3.25 Consumers were given a range of statements and asked to what extent they agreed or disagreed with each. The results are summarised in figure 6 and illustrate that the perception remains amongst consumers that they will not benefit from a range of DQ providers as they will only call one number – stated by 66% of users. Similarly 68% feel the choice of many different providers is confusing. However, for a significant minority, competition is seen to have some benefits and consumers say it will lead to an improvement in service quality (40% agree) and it is expected that costs will be driven down (42% agree). A quarter (25%) agrees that the extra services on offer will be really useful.

Figure 6. Consumer’ general opinion on DQ liberalisation. Those agreeing with statements¹⁵



*Not asked prior to November 2004

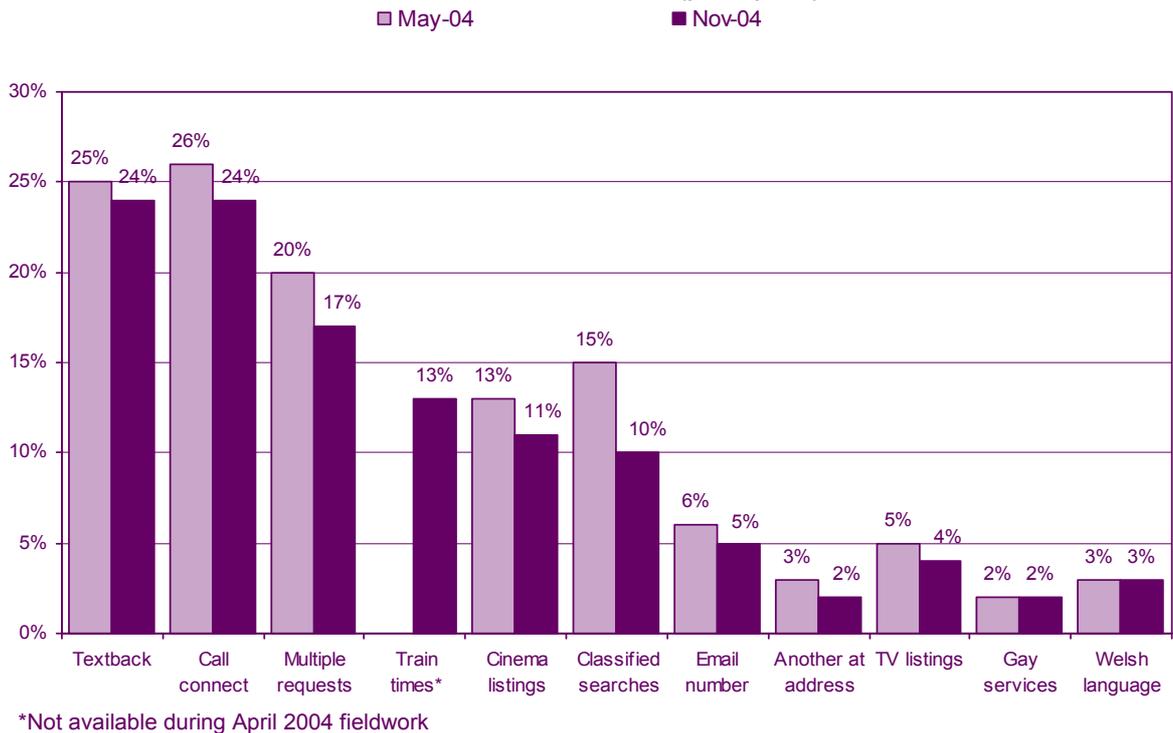
¹⁵ Base: 742 UK adults (15+) using any 118 national DQ services, November 2004, MORI survey. Results are calculated by adding “agree strongly” and “tend to agree” responses

Prompted awareness of additional DQ services

3.26 Half (46%) of UK adults are now aware of DQ providers offering additional services; a small but steady increase since April 2004 (41%). Those additional services with the highest levels of awareness are text-back and call connect (both 24%) see figure 7.

3.27 Awareness of other services available from DQ providers (for example, cinema and TV listings, specialist gay services, obtaining telephone numbers for neighbours or someone else in the same house, classified searches) remains low in comparison.

Figure 7. Trend in awareness of additional services (prompted)¹⁶



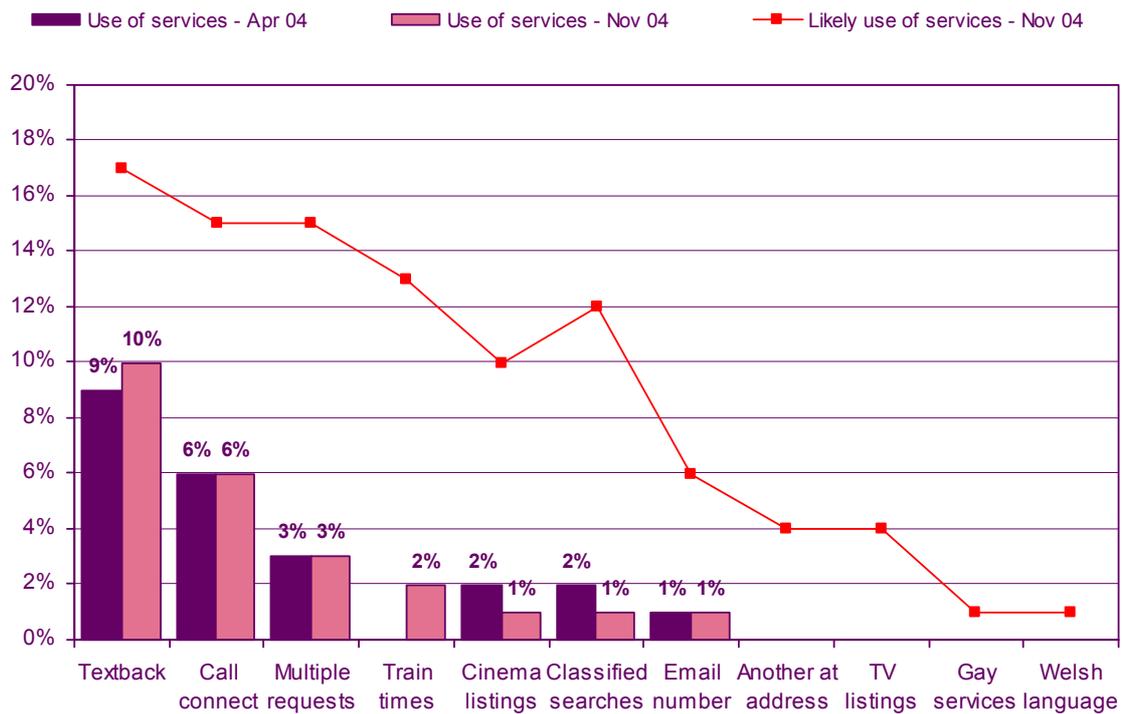
Use of additional DQ services

3.28 When asked about their potential use of additional services, more UK adults say they are likely to use the additional services such as text-back and call connect in the next 12 months than do so currently, as shown in figure 8. In addition, more UK adults are aware of the services than are likely to use them.

3.29 One in six UK adults say they have used at least one of the additional services offered by DQ providers. Text-back has generated most interest; just over one in ten mobile customers has used the service (12%). Call connect is the second most popular, currently used by 6% - the same level of use as in April 2004. Other services have been used by a small proportion of users.

¹⁶ Base: All (2,122 UK adults 15+), November 2004, MORI survey

Figure 8. Trend in use of additional services, compared to stated likelihood to use (prompted)¹⁷



3.30 The majority (89%) of DQ service users are unaware that the text-back service is free. Half simply stated they did not know - this includes a third who have called a DQ service from their mobile highlighting a further information gap among consumers. The average cost estimate for text-back is 35p.

3.31 Consumers are also confused, though to a lesser degree, about the onward call charges when using the call connect service. A third of those who have used call connect do not feel able to give an estimate of the charges per minute after connection. This is despite the fact that, in the majority of cases, the charges are given to the caller when the call is connected, as required by the ICSTIS Code of Practice. Of those consumers who were able to estimate the cost of the onward call, an average of 30 pence per minute was given. Onward call costs vary across providers and lie between 5p per minute for 118 877 and 50p per minute for 118 080.

3.32 Those who use call connect from a mobile (correctly) estimate higher onward call charges (an average of 46 pence). As with fixed line users, a substantial number (38%) don't feel able to estimate onward call costs. In fact, onward call costs from a mobile vary depending on the provider and the network from which the call is being made.

¹⁷ Base: All (2,122 UK adults 15+), November 2004, MORI survey

Consumer requirement for comparable information

- 3.33 A third of DQ users say they would use information, if it were available, to compare the costs of various 118 providers, however almost two-thirds (63%) say they are unlikely to. Potential use of information to compare costs between providers was highest amongst younger DQ users aged 15-34 and AB social grades.
- 3.34 The phonebook is the most popular source for this type of information for comparison between DQ service providers; 34% would like to see the information there. The internet would be used by a quarter, while a leaflet, either alone or with a phone bill, would be appreciated by a fifth. Ofcom/ICSTIS/Regulator is mentioned by 2%.

Section 4

Performance of telephone DQ services

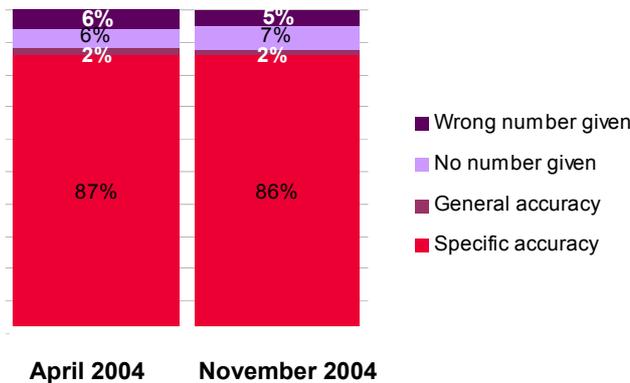
Accuracy of telephone DQ services

- 4.1 Assessment of the performance of 30 of the main DQ providers was achieved via “mystery shopping”. This technique uses trained individuals to experience and measure the process when calling a 118 xxx number, by posing as real customers¹⁸. As the process is strictly controlled, this objective reporting provides a snapshot of the real-life customer experience. Particular focus was given to the accuracy of the numbers given and the call duration.
- 4.2 Some DQ providers have agreements with some corporate customers with regard to their preferred number/s to be given out to consumers. For example, if a consumer requests a particular department of an organisation, the DQ operator may have been instructed to only give out the main switchboard number, even though the department requested was listed. The purpose of these agreements is partly to enable businesses to keep a closer track of the calls it receives, the sources of those calls and/or to process its calls more efficiently.
- 4.3 Ofcom has taken this into account in its analysis of the overall accuracy of the market and in particular the accuracy of business requests. Ofcom has defined positive outcomes in two ways:
- **‘specific accuracy’** – this measure replicates Ofcom’s April 2004 definition ‘a request results in the correct number and in the case of business requests the number reaches the requested department’
 - **‘general accuracy’** – ‘a request results in the correct number and in the case of business requests the number reaches the requested business but *not necessarily* the requested department’. For a number to be acceptable within the definition of ‘general accuracy’ the telephone number given by the DQ operator must be able to be transferred to the requested department *within the same call*.
- 4.4 In order to provide a direct comparison between waves, data from both April and November 2004 have been analysed using both definitions of accuracy.
- 4.5 As illustrated in figure 9 the overall accuracy of the market remains unchanged in terms of the number of requests answered ‘accurately’, resulting in a ‘wrong number given’ or ‘no number given’.
- 4.6 The overall ‘specific accuracy’ score for April 2004 stands at 87% rising to 89% when applying the ‘general accuracy’ definition. This compares to 86% rising to 88% for November 2004. During November 2004 a ‘completely incorrect’ number was given on 5% of occasions, with the remainder of calls (7%) resulting in no telephone number being provided¹⁹.

¹⁸ For more details see Section 6: Methodology

¹⁹ The data collected is weighted to reflect the real-world profile of calls to DQ services. Weights are applied to three separate factors in order to calculate the overall accuracy figure: confidential market shares of the providers, proportion of requests for business and

Figure 9. Breakdown of call outcomes: no statistically significant change since April 2004²⁰



4.7 ‘Specific accuracy’ of business requests (86% of cases) remains slightly higher than for residential requests (81%) in November. Therefore, within the confines of the technique used to measure the accuracy of service provision in the market, there are no indications of either improvement or deterioration in the market as a whole since April 2004.

Changes in individual service accuracy levels between April 2004 and November 2004

- 4.8 Of the 30 DQ numbers assessed in the mystery shopping exercise²¹:
- Five DQ services have statistically significantly improved their ‘specific accuracy’: 11 88 88 Conduit Welsh (+17%), 11 88 88 Conduit (+12%), 118 321 Tesco (+10%), Telewest 118 180 (+9%) and 118 848 Conduit (+8%);
 - The majority of services (24) remain broadly stable;
 - There has only been one service, 118 500 BT²² that has seen a decline in its level of accuracy falling to 83% from 93% in April 2004 when comparing ‘specific accuracy’ levels and falling 11% when comparing ‘general accuracy’ levels.

residential numbers, and the average number of calls dealt with in under or over 60 seconds. The 86% ‘specific accuracy’ score is not statistically significantly different to the 87% ‘specific accuracy’ score reported in April 2004 at the 99% confidence level.

²⁰ Base: All standard calls (c200 to each provider), April 2004, November 2004, MORI survey

²¹ c200 calls to each provider (c50 ‘easy’ and c50 ‘difficult’ business requests, c50 ‘easy’ and c50 ‘difficult’ residential requests) made in October-November 2004 and compared to the same spread of calls made in April 2004. Accuracy levels are calculated based on the number of total calls which returned correct number or a suitable alternative number. Individual DQ service data was then weighted to the ‘real world’ profile of business and residential requests (87% and 13% respectively).

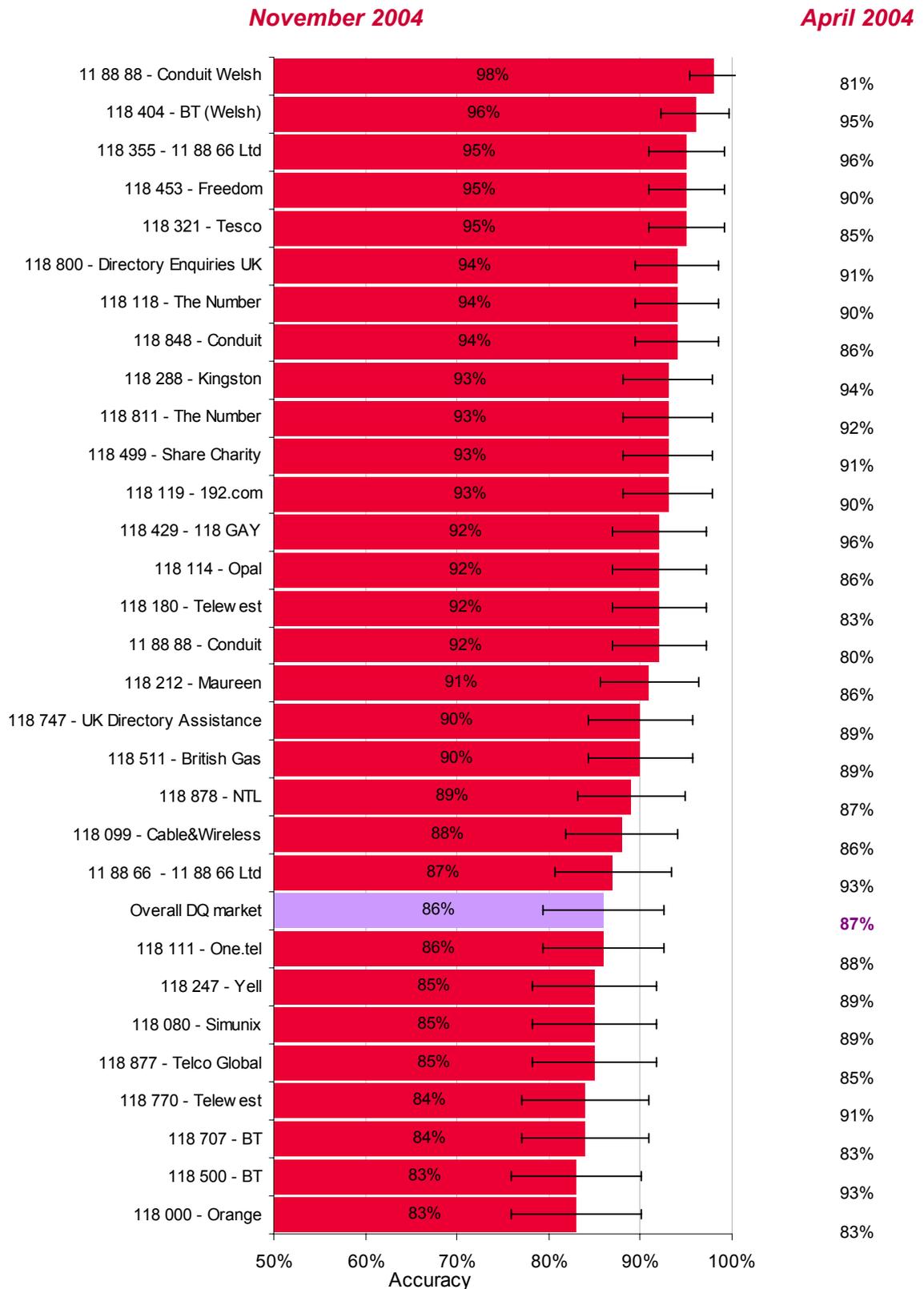
²² Significant decline in accuracy tested at 95% and 99% confidence levels

Comparison of accuracy between DQ services

- 4.9 The two Welsh language services (118 888 Conduit Welsh, and 118 404 BT Welsh) obtained the highest degree of 'specific accuracy' of the 30 providers measured, illustrated in figure 10 joined by 118 321 Tesco and 118 355 11 88 66 Ltd when comparing 'general accuracy', see figure 11.

Figure 10. 'Specific accuracy' of DQ providers: % correct numbers supplied²³

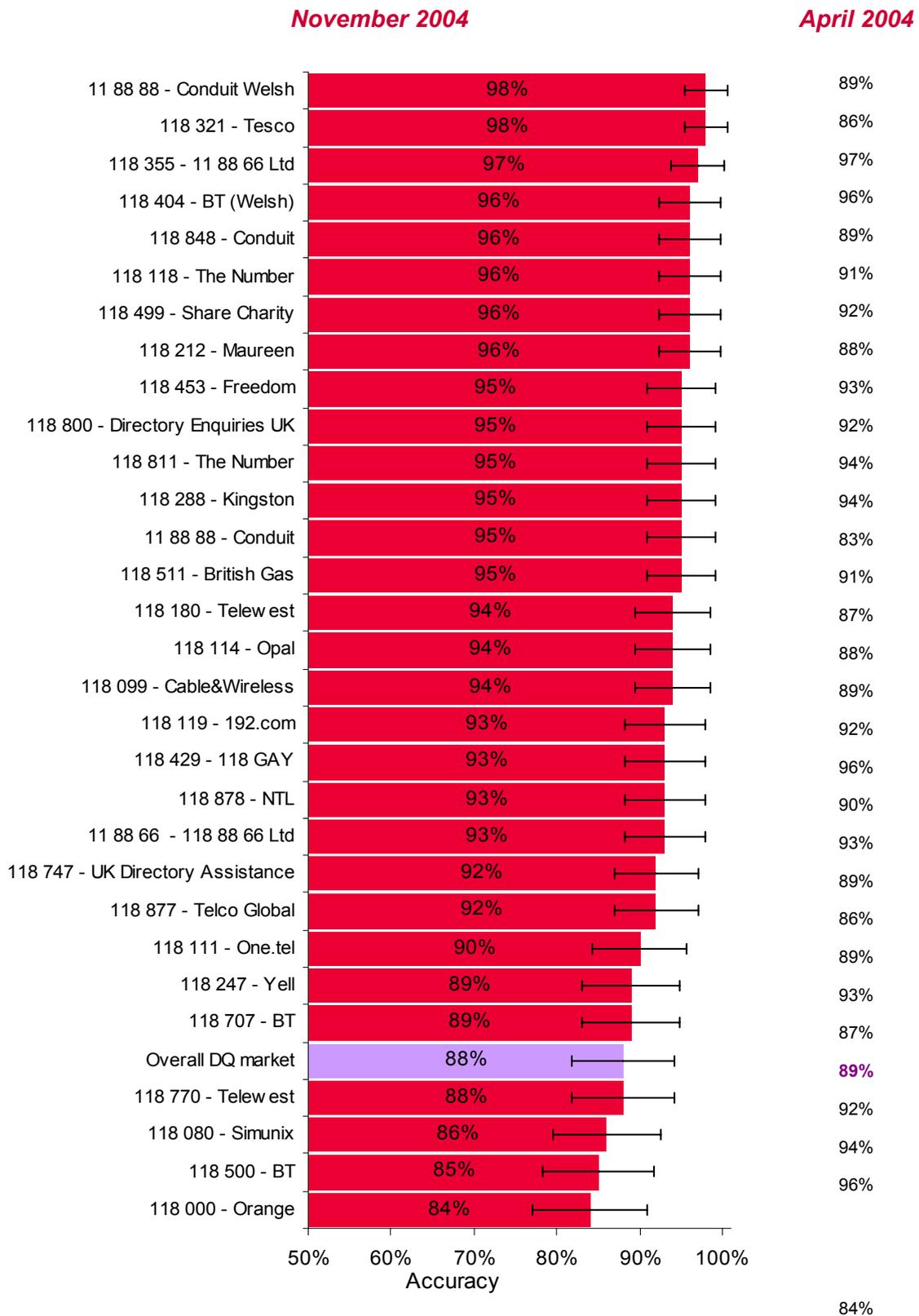
Error bars show range at 99% confidence interval



²³ Base: All standard calls (c200 to each provider), November 2004, MORI survey

Figure 11. 'General accuracy' of DQ providers: % correct numbers supplied²⁴

Error bars show range at 99% confidence interval



²⁴ Base: All standard calls (c200 to each provider), November 2004, MORI survey

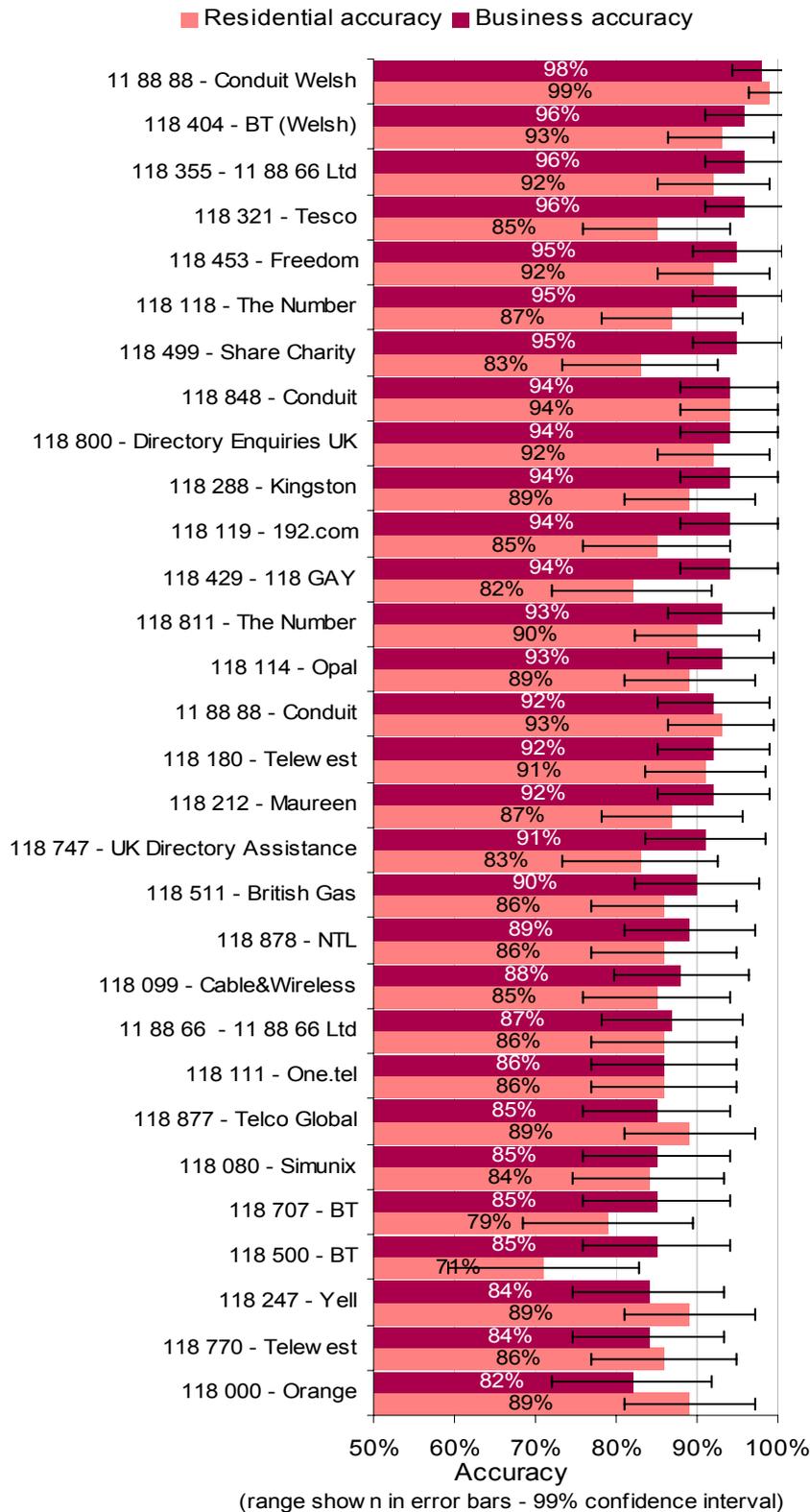
4.10 As mentioned above, and illustrated in figures 12 and 13 below, requests for business numbers tend to score higher on accuracy than residential requests and account for almost nine in ten calls to DQ providers.

- 19 DQ services scored 90% or higher for 'specific accuracy' in business requests, with no change in this proportion when applying the 'general accuracy' definition.
- The remainder (11 DQ services) scored above 82% for 'specific accuracy'.
- When applying the 'general accuracy' definition the number of providers accurate at least 90% of the time rises to 25.

4.11 As residential requests are not affected by the 'general accuracy' definition both accuracy figures are the same. For residential requests there is a wider spread of performance

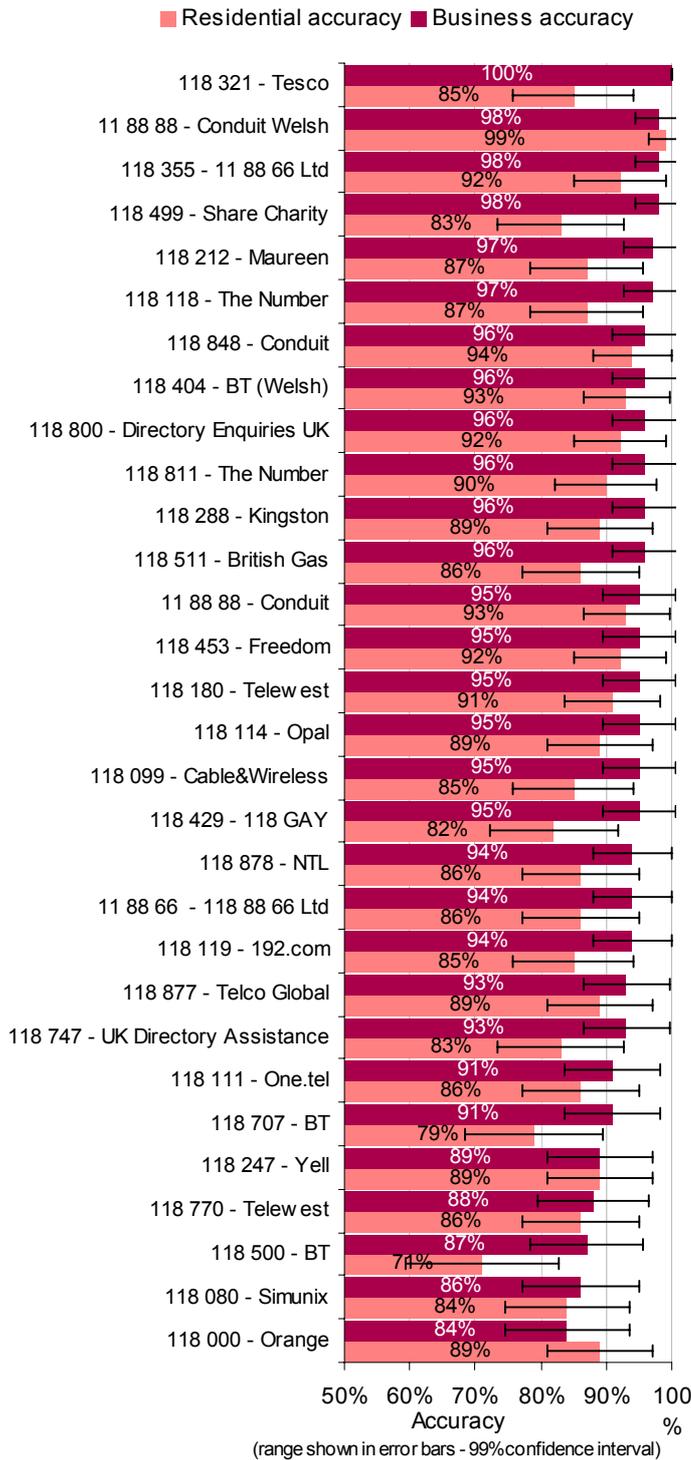
- nine providers are accurate at least 90% of the time
- 19 providers score accuracy levels in the range 82-89%.
- The remaining two services scored 71% and 79%

Figure 12. 'Specific accuracy' of DQ providers: Business versus residential requests²⁵



²⁵ Base: All business and residential calls (c100 business and c87 residential calls to each provider), November 2004, MORI survey

Figure 13. 'General accuracy' of DQ providers: Business versus residential requests²⁶



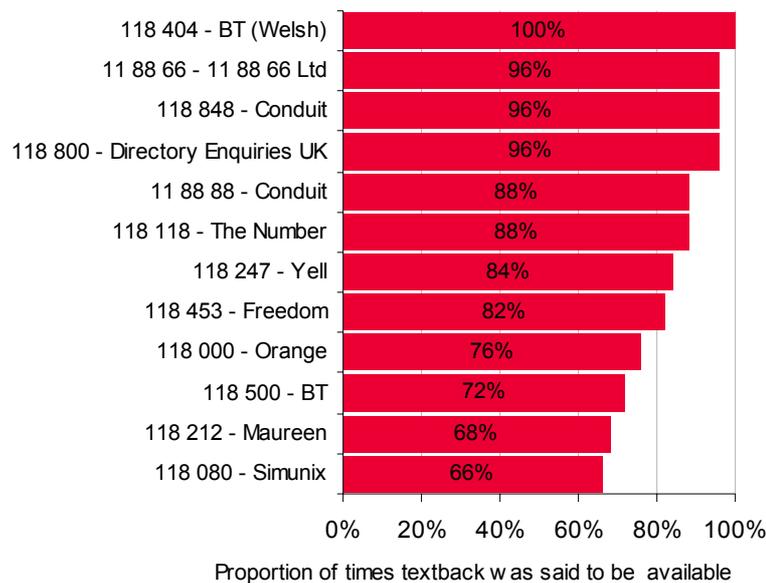
²⁶ Base: All business and residential calls (c100 business and c87 residential calls to each provider), November 2004, MORI survey

Availability and performance of text-back service

4.12 Twelve of the selected DQ numbers currently provide the text-back service (as shown in figure 14). There is no additional charge for this service and when a customer calls from a mobile the number being sought is sometimes sent automatically without being requested.

4.13 There appears to be some confusion amongst call operators as to whether or not these services are available. Some of the callers were incorrectly advised in some instances that the service was not available. As shown below, this ranges from 'never' (118 404 BT Welsh) to one third of occasions (118 080 Simunix) – illustrating a need amongst DQ service providers to ensure call centre staff are fully aware of the services offered.

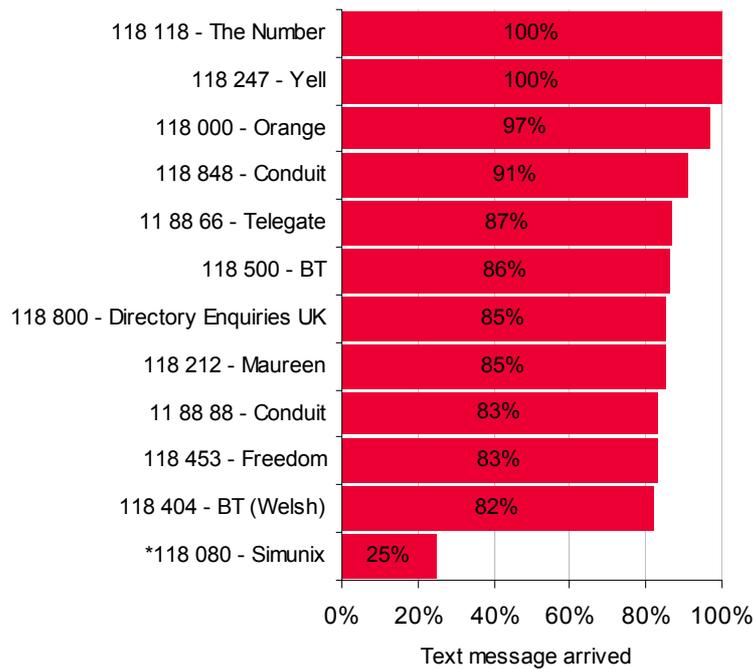
Figure 14. Call centre staff awareness of availability of text-back service²⁷



4.14 In instances where text-back was stated as being available, most texts were received by the user. Two DQ services, 118 118 (The Number) and 118 247 (Yell) had 100% delivery of text messages, as illustrated in figure 15. In the case of all other providers there were instances where the number was not received by the caller's mobile. All five main mobile carriers plus Virgin were used when making calls to limit the effects of individual network problems (except in those cases where mobile operators do not support a particular DQ service).

²⁷ Base: All text-back calls (c50 to each provider), November 2004, MORI survey

Figure 15. Accuracy of text-back service: Most text messages arrived²⁸



* Simunix advised Ofcom they were experiencing technical difficulties during the fieldwork period.

4.15 There could be numerous reasons for non-receipt of text-back messages and there is no way of assessing, in the case of non-receipt, whether the message was ever sent by the DQ operator, whether it was lost on the network or whether this was due to any other technical issue. The impact of this on the consumer is that they may be required to make a second call to the DQ service to request the number again if they did not write it down the first time.

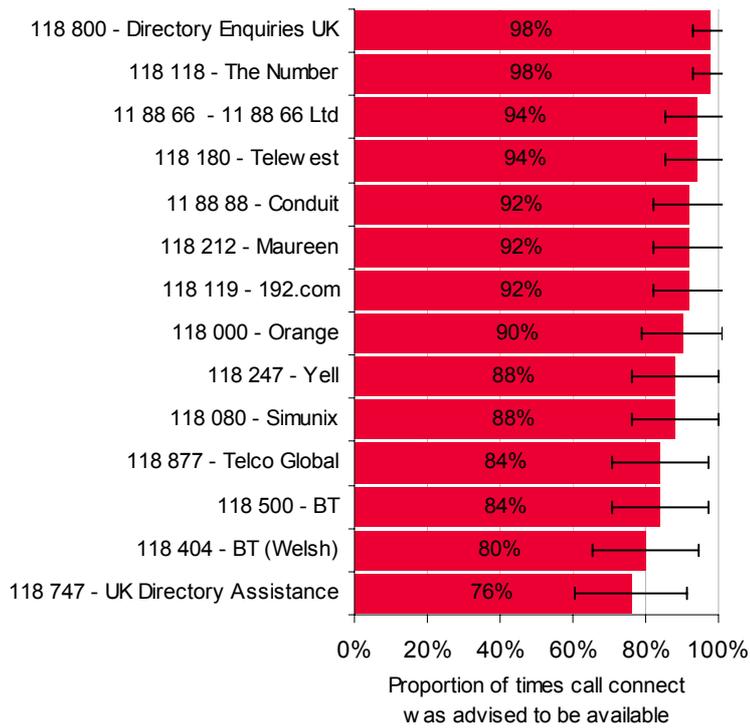
Availability of call connect service and provision of cost information

4.16 There appears to be some confusion among call centre staff as to the availability of the onward call connection service, although to a lesser extent than for text-back services. On average, around one in ten call centre staff was not aware that this service was available.

4.17 Where offered, DQ providers are obliged to advise the caller of the cost of the onward connection. In most instances this is happening - on 86% of occasions across the 14 providers call charges were given. As shown in figure 17, three of the services that offer call connect gave the onward call cost on almost every occasion: 118 118 (The Number), 118 180 (Telewest) and 118 888 Conduit (all 98%).

²⁸ Base: All text-back calls where text-back is available and operator could supply number, November 2004, MORI survey

Figure 16. Call centre staff awareness of call connect availability²⁹
 Error bars show range at 99% confidence interval



²⁹ Base: All call connect calls (c50 to each provider), November 2004, MORI survey

Figure 17. Comparison of the provision of onward call connection charges from providers³¹

| DQ No. | Call connect cost given at all % | Call connect charges not given (cost not requested) % |
|--|----------------------------------|---|
| Average across providers | 86 | 14 |
| 118 118 (The Number) | 98 | 2 |
| 118 180 (Telewest) | 98 | 2 |
| 118 888 (Conduit) | 98 | 2 |
| 118 877 (Telco Global) | 95 | 5 |
| 118 247 (Yell) | 93 | 8 |
| 118 404 (BT Welsh) | 93 | 8 |
| 118 212 (Maureen) | 90 | 10 |
| 118 747 (UK Directory Assistance) | 89 | 11 |
| 118 119³⁰ (192.com) | 86 | 14 |
| 118 080 (Simunix) | 81 | 19 |
| 118 800 (DQ UK) | 74 | 26 |
| 118 866 (11 88 66 Ltd) | 72 | 28 |
| 118 500 (BT) | 70 | 30 |
| 118 000 (Orange) | 65 | 35 |

³⁰ Note calls to 118 111 from Ontel are free

³¹ Base: all where call connect was offered and the number requested was available: (583), November 2004, MORI survey

Section 5

Cost comparisons of telephone DQ services

Duration of calls to 118 numbers

- 5.1 Of the services tested in this mystery shopping exercise, 12 DQ services charge consumers a flat rate fee for the call while the remainder charge consumers according to the length of the call. Therefore, for those not offering flat rate fee services, call efficiency is important. The amount of time taken to obtain a number (chargeable time) was logged as part of the exercise. Only one of the flat rate fee services (Conduit - 118 848) also offers text-back for this single cost. The remainder simply offer consumers the basic directory service, although for a minority of these services multiple searches are available.
- 5.2 Across all requests, the average call duration, from connection to obtaining the information requested (either a number or to be told no number is available), was 50 seconds³².
- 5.3 The chargeable time taken to provide one number was less than 40 seconds in half of cases (56%), and less than 60 seconds in 87% of cases (including provision of an incorrect number). Results are similar when only accurate information delivery is taken into account. In those cases where a DQ operator is unable to provide the number (which occurs in 7% of calls), the average call length increases to 84 seconds compared to 49 seconds when a number is given.
- 5.4 Residential calls take longer than business calls: two thirds of business numbers (66%) were given in less than 40 seconds, while four in ten residential numbers (41%) were given in the same time.

Costs and accuracy

- 5.5 Current pricing structures across directory providers vary considerably, as illustrated below. Therefore it perhaps not surprising that seven in ten consumers find the current level of choice confusing. Half (14 out of 30) of the tested DQ services are cheaper than the 40p previously charged by 192 (see figure 31). In addition, certain providers offer directory services free of charge to their own telephone service customers (eg. One.tel – 118 111 and Tesco 118 321). Share Charity's 118 499 service costs marginally more on average than 192 (43p from BT network) but donates 5p per call equally between two charities (Barnardo's and The British Red Cross). Other services focus on particular business models, with charging structures designed to benefit consumers opting to use call-connect for instance.
- 5.6 Prices illustrated in the following charts have been calculated using information direct from individual DQ numbers (where provided), across all the major telephone networks/ carriers. As discussed above, a range of different pricing structures exist:

³² Calculated using the median

- Flat fee for whole call regardless of length;
 - Initial connection charge (which includes first minute of call) + pence per minute charge for remainder of call (charged per second);
 - Initial connection charge (which does not include first minute of call) + pence per minute charge for whole call (charged per second);
 - No connection charge and pence per minute charge for whole call (charged per second).
- 5.7 When calling from a BT line, there is little relationship between the cost of calls to a DQ provider and the accuracy of information given. Those providing the best value for money i.e. those with the higher levels of overall accuracy and having the lower call charges (taking into account the call length) are 118 848 (Conduit) and 118 355 (11 88 66 Ltd), illustrated in the top right hand portion of figures 18 and 19. At the other end of the scale, i.e. those with relatively lower levels of accuracy and higher call charges are 118 866 (11 88 66 Ltd), 118 500 (BT), 118 080 (Simunix) and 118 000 (Orange).
- 5.8 In general it can be observed that 118 services offered at a flat rate tend to offer the most competitive prices, with almost all of the flat rate service providers also delivering higher levels of accuracy (see figures 18 and 19).

Figure 18. ‘Specific accuracy’ of all calls information and average cost of calls via the BT network³³

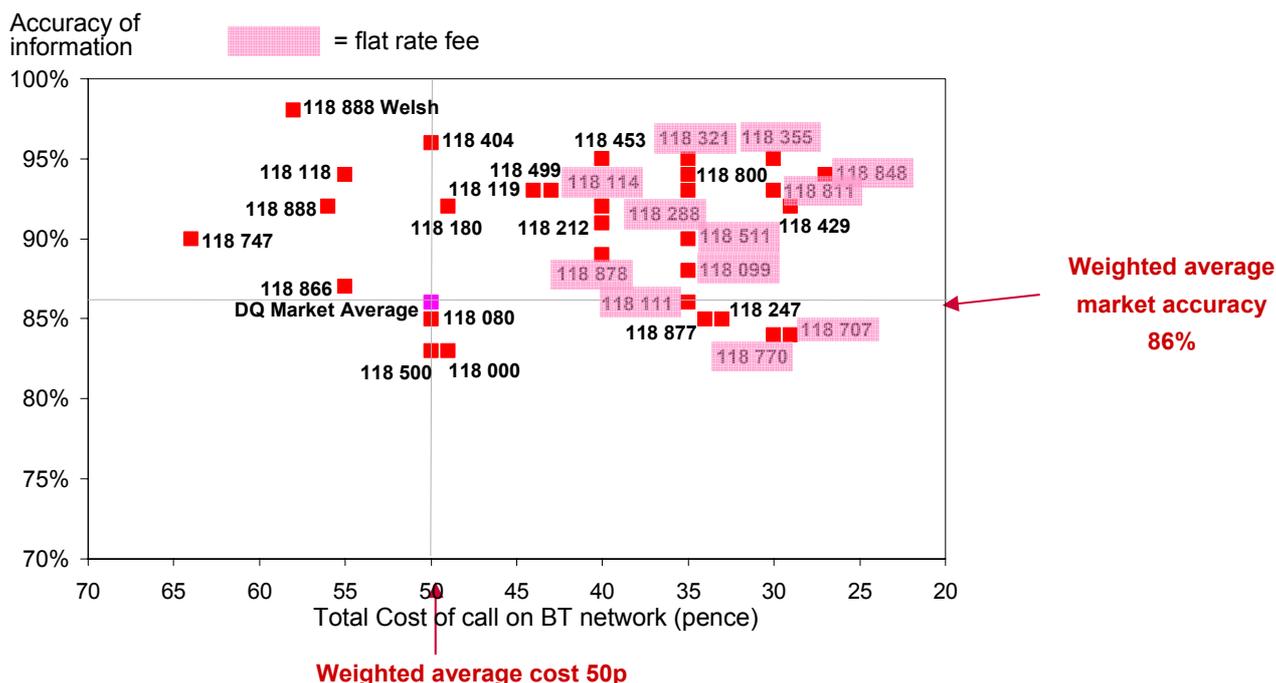
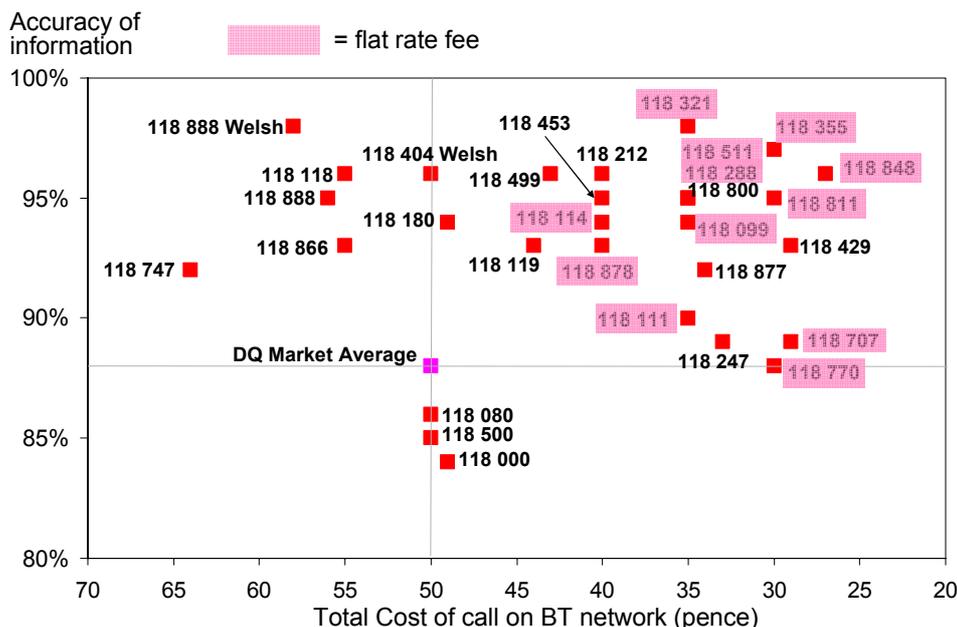


Figure 19. ‘General accuracy’ of all calls information and average cost of calls via the BT network³⁴



5.9 When calling from the BT network, there is a similar pattern of call accuracy against the cost of calls for residential and business calls. In both cases, 118 848 (Conduit) and 118 355 (11 88 66 Ltd) both have relatively higher levels of accuracy and are least expensive, ie provide best value for money.

³³ Base: All calls (c200 to each provider), November 2004, MORI survey

³⁴ Base: All calls (c200 to each provider), November 2004, MORI survey

Figure 20. ‘Specific accuracy’ of residential calls only: Accuracy of information and average cost of calls via the BT network³⁵

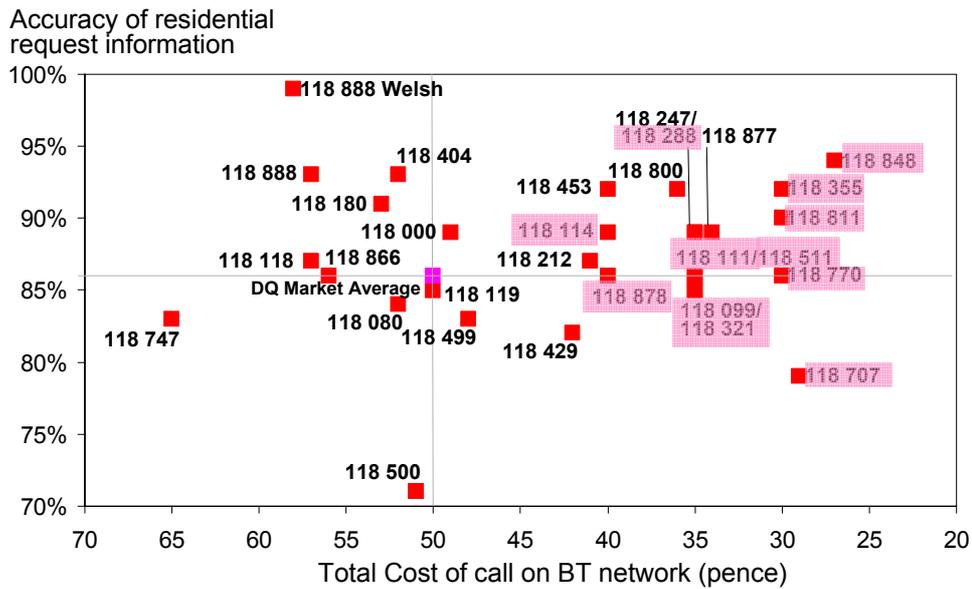
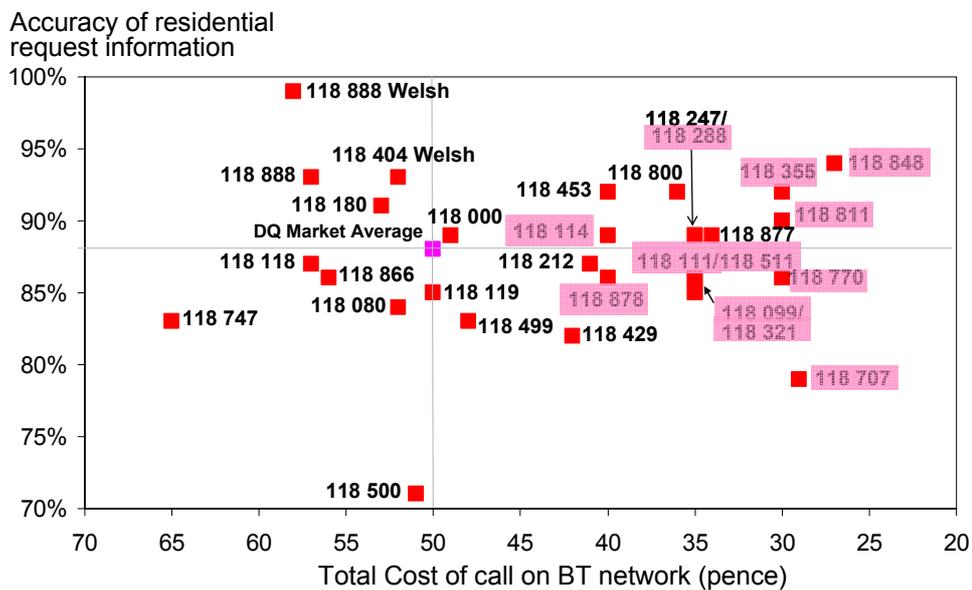


Figure 21. ‘General accuracy’ of residential calls only: Accuracy of information and average cost of calls via the BT network³⁶



³⁵ Base: All calls (c100 to each provider), November 2004, MORI survey

³⁶ Base: All calls (c100 to each provider), November 2004, MORI survey

Figure 22. ‘Specific accuracy’ of business calls only: Accuracy of information and average cost of calls via the BT network³⁷

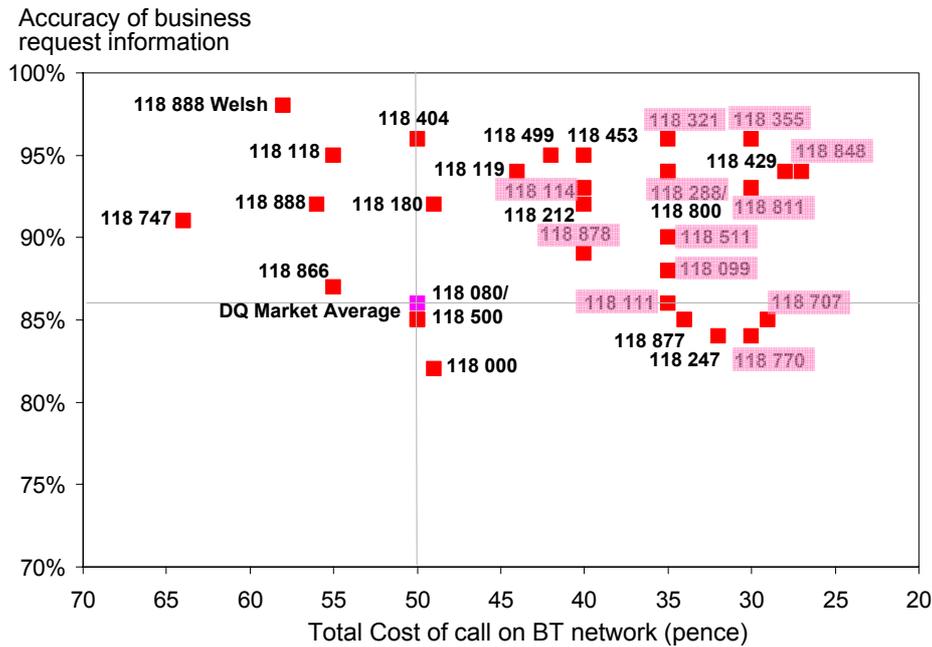
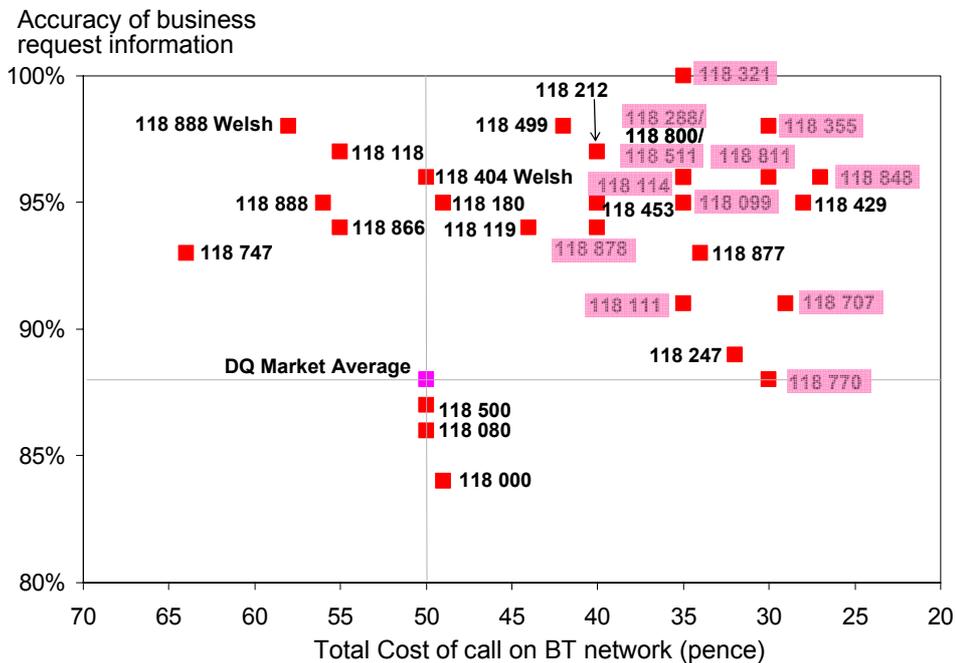


Figure 23. ‘General accuracy’ of business calls only: Accuracy of information and average cost of calls via the BT network³⁸



5.10 Consumers have significantly less choice of DQ providers when using either of the cable networks (Telewest and ntl) in comparison to those using the BT network. There is also a lack of correlation between cost of calls and accuracy of number given on both cable networks – as shown in the following charts.

³⁷ Base: All calls (c100 to each provider), November 2004, MORI survey

³⁸ Base: All calls (c100 to each provider), November 2004, MORI survey

Figure 24. ‘Specific accuracy’ of all calls information and average cost of calls via the Telewest (cable) network³⁹

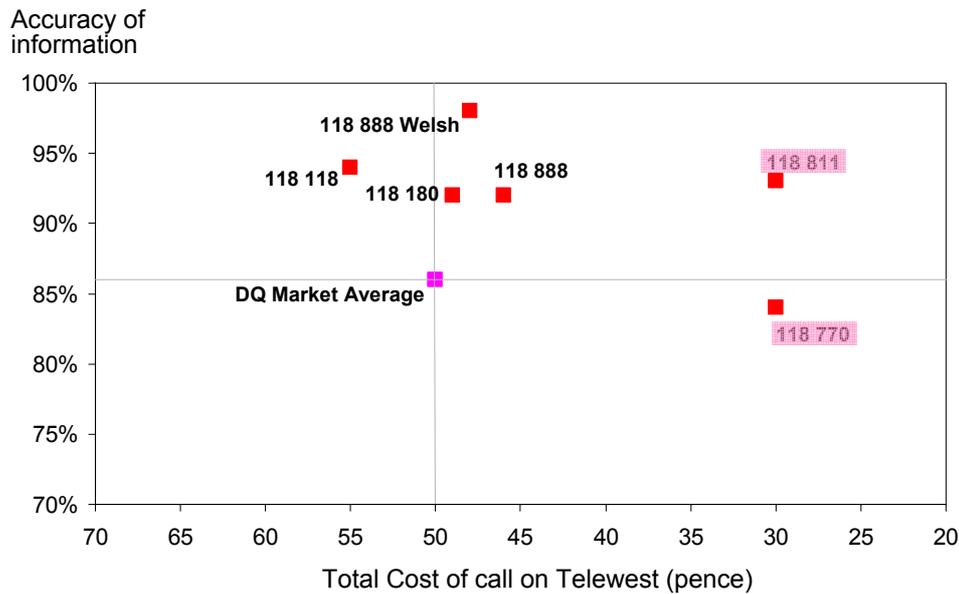
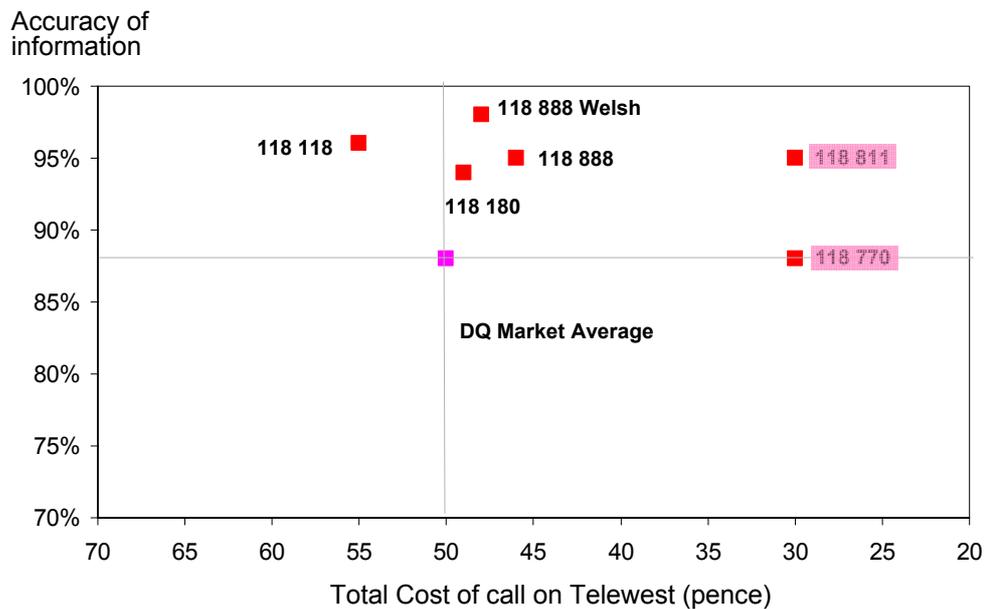


Figure 25. ‘General accuracy’ of all calls information and average cost of calls via the Telewest (cable) network⁴⁰



³⁹ Base: All calls (c200 to each provider), November 2004, MORI survey

⁴⁰ Base: All calls (c200 to each provider), November 2004, MORI survey

Figure 26. ‘Specific accuracy’ of all calls information and average cost of calls via the ntl network⁴¹

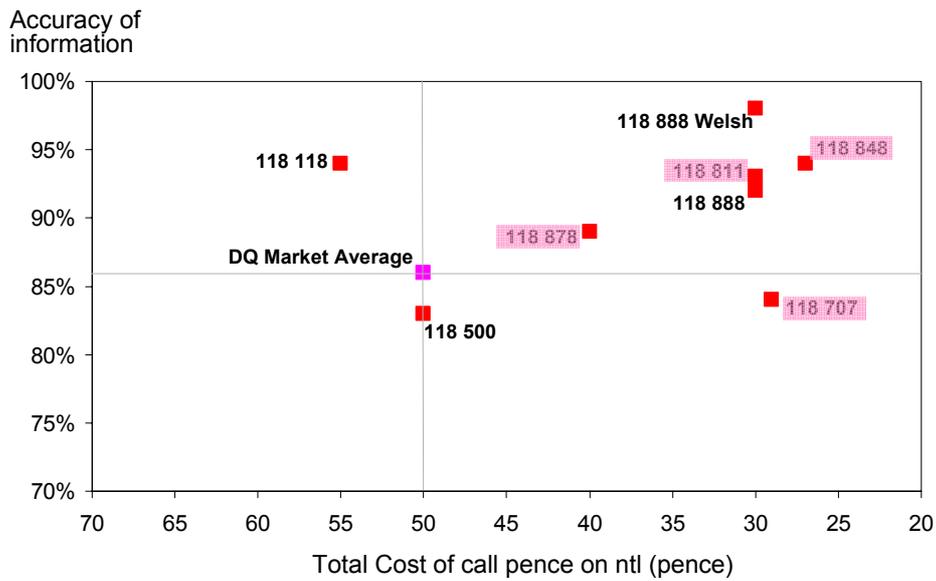
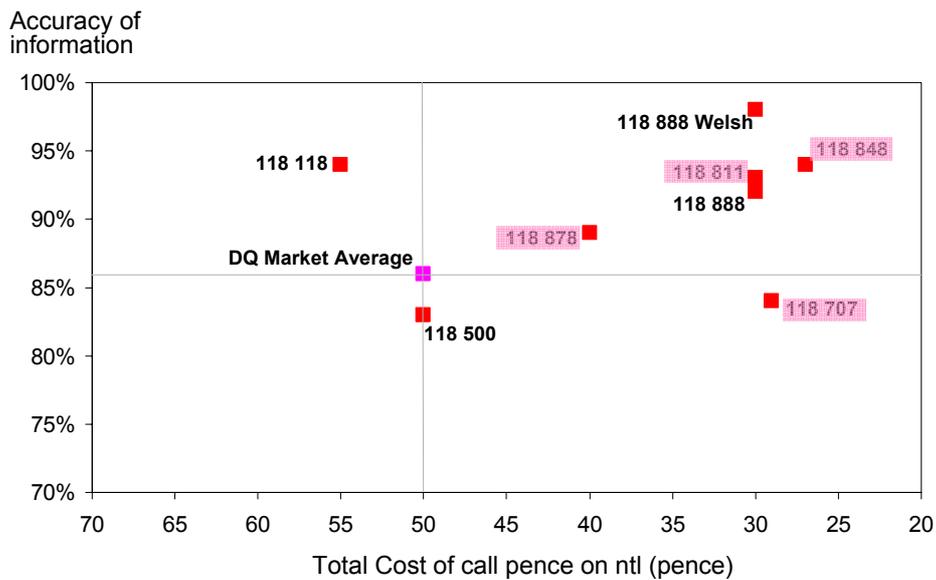


Figure 27. ‘Specific accuracy’ of all calls information and average cost of calls via the ntl network⁴²



5.11 Based on the average call length (time taken to give the information and therefore chargeable time), there is little difference between fixed line call costs between carriers. Calls made from BT, Telewest and ntl cost on average between 39p and 43p. Calls made from mobiles are more expensive, the cheapest being O2 (64p on average). The most expensive is Orange with an average call charge of 71p.

⁴¹ Base: All calls (c200 to each provider), November 2004, MORI survey

⁴² Base: All calls (c200 to each provider), November 2004, MORI survey

Figure 28. Comparison of costs between different telephone operators/ carriers across the DQ market⁴³

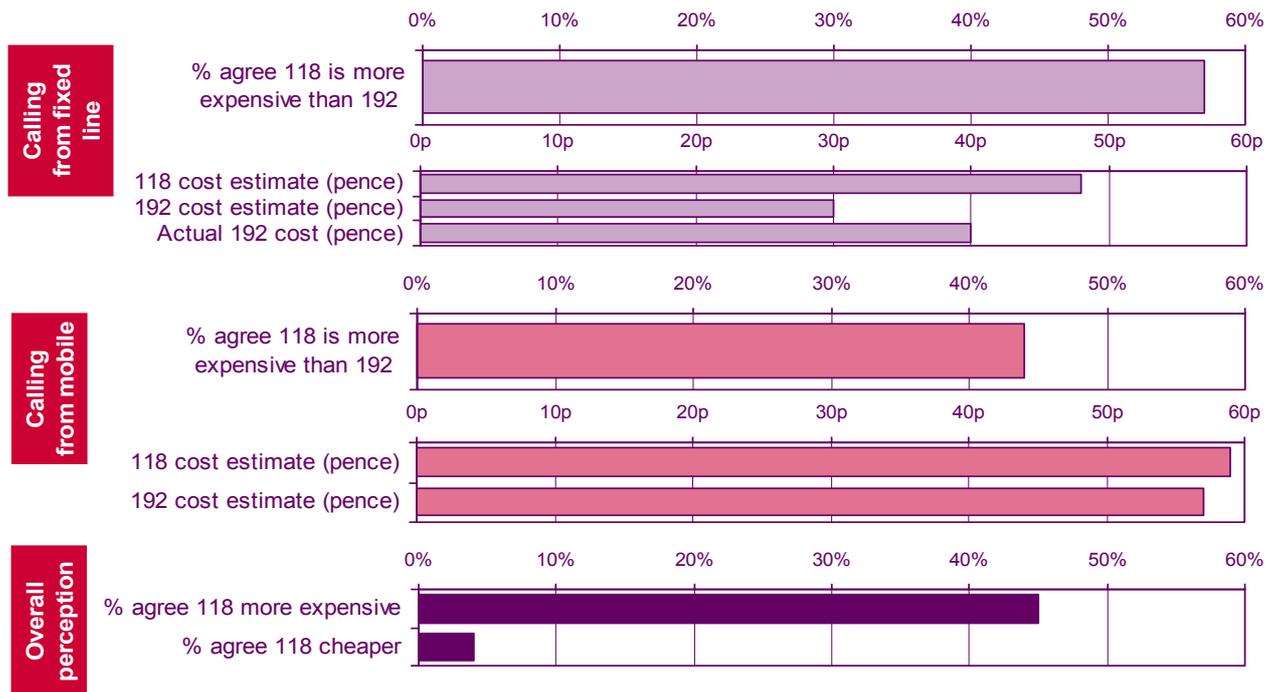
| Telephone company/ carrier | Mean cost across 30 tested DQ numbers (pence) |
|--|---|
| Based on the average call time | |
| Fixed line (based on calls from BT network) | 50p |
| BT | 42p |
| Telewest | 43p |
| Ntl | 39p |
| Mobile | |
| Orange | 71p |
| O2 | 64p |
| T-mobile | 68p |
| Vodafone | 67p |
| Virgin | 66p |
| 3 | 67p |

Perceptions of fixed and mobile DQ call costs

5.12 A significant minority (41%) of fixed-line DQ users do not know how much their chosen supplier charges to obtain a single UK telephone number. As illustrated in figure 29, of those who were able to estimate a cost, the range was 41p to 50p with an average of 48p. 118 numbers were perceived to be more costly per call than 192 (57% agree) despite an overall view that competition will lead to price cuts (42% agreed with this statement). The average perceived cost of a call to the former 192 system was 30p from a fixed line, 18p cheaper than the equivalent in the new competitive market, although the actual cost of a 192 enquiry from the BT network was 40p, indicating that people think that 192 was cheaper than it actually was.

⁴³ Base: All requests 5,607, November 2004, MORI survey

Figure 29. Perceptions of costs to call 192 and main 118 services⁴⁴

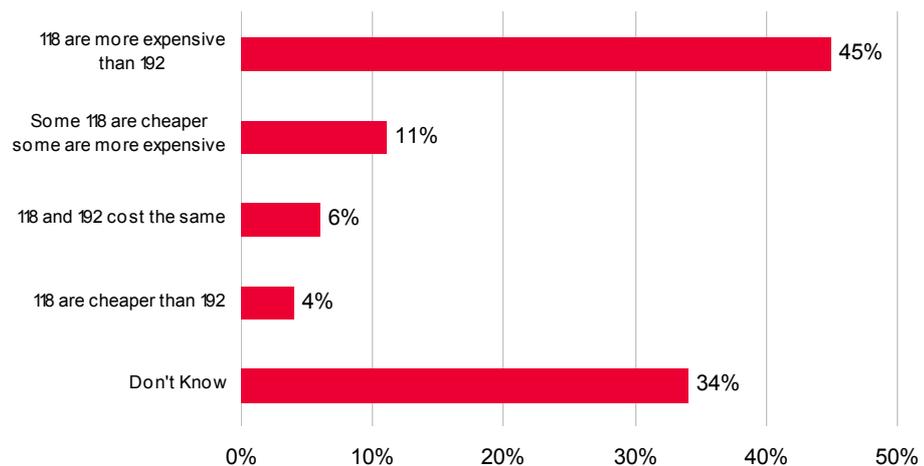


5.13 Mobile DQ users are more likely than fixed line users to have an *opinion* of the cost in getting a telephone number from DQ but there is little consensus as to what the actual cost is. The average expected cost of a call from a mobile to a DQ provider is 59p (11p more than the fixed line equivalent), although one in ten expect the cost to be more than £1. Mobile DQ users are slightly less likely than fixed-line DQ users to feel their service is more expensive than the old 192 service (44% feel this is the case), although the balance of opinion is still that the new services cost more. The estimated cost of calling the old 192 service from a mobile is 57p, 2p cheaper than its 118 equivalent.

5.14 Across the board, therefore, customers believe that 118 charges are higher than the charges for the old 192 system. This perception is felt more in the case of calls from a fixed line rather than a mobile phone.

5.15 There is also confusion as to whether 118 is more or less expensive than 192. Almost half (45%) of UK adults see the 118 numbers as more expensive than 192 though a third feel unable to say what the true price comparison is.

⁴⁴ Base: All (565) calling one DQ number from fixed line most often, All (118) calling one DQ number from mobile most often, All (2,122 UK adults 15+), November 2004, MORI survey

Figure 30. '118' services are perceived to be more expensive than 192⁴⁵

DQ call costs: Perception vs reality

- 5.16 Just over half (52%) of consumers are aware that prices vary between DQ providers, and just over a third (37%) are aware that some DQ operators offer different services to each other (unchanged since April 2004). Currently a quarter consider that all providers offer the same services and 8% believe they all charge the same price. As indicated above, this is clearly not the case, highlighting a consumer information gap in this area.
- 5.17 The approximate average price being paid by consumers to obtain a single UK number is 50p⁴⁶. Consumers' own estimates of the cost to obtain a single number from a fixed line are close to (though slightly lower than) this average (48p). However, the UK public underestimates the average call charges from mobiles (an estimate of 59p against reality in the range 64-71p per call).
- 5.18 There is, therefore, a marked difference between the perceived costs associated with 192 (which consumers erroneously estimate to have cost 30p per call on average), and both the real-world charges and the perceived charges of the liberalised market.

Availability and costs

- 5.19 Some mobile and fixed-line carriers do not support all DQ numbers. Call charges to those DQ providers that are available on each carrier also vary greatly. Based on an average call length of 51 seconds, call costs lie in the range 27p-200p. The least expensive would be a call from BT or ntl to 118 848 (Conduit) and the most expensive would be to call 118 499 Share Charity from Orange, as illustrated in figures 31 and 32.

⁴⁵ Base: All (2,122 UK adults 15+), November 2004, MORI survey. Results are calculated by adding "agree strongly" and "tend to agree" responses

⁴⁶ This has been calculated using average time taken to obtain a single number, the weighted average cost (taking account of market share) across all DQ providers from a BT line. In the absence of the overall call volumes to DQ via each of the fixed networks (BT, Telewest, Vodafone etc), only BT fixed-line call costs have been used in this calculation (assumed to be the carrier most frequently used to call). However, it should be noted that there are some wide variations in costs across carriers to the same 118 number which have not been taken into account in this calculation.

Figure 31. Comparison of costs (in pence) between fixed-line telephone companies/ carriers across individual DQ operators where available (based on average call duration)⁴⁷

| DQ No. | BT | Telewest | ntl | Accuracy |
|-------------------------------|------------|-----------------|------------|-----------------|
| Overall market average | 50p | | | 86% |
| 118 000 | 49 | n/a | n/a | 83% |
| 118 080 | 50 | n/a | n/a | 85% |
| 118 099 | 35 | n/a | n/a | 88% |
| 118 111⁴⁸ | 35 | n/a | n/a | 86% |
| 118 114 | 40 | n/a | n/a | 92% |
| 118 118 | 55 | 55 | 55 | 94% |
| 118 119 | 44 | n/a | n/a | 93% |
| 118 180 | 49 | 49 | n/a | 92% |
| 118 212 | 40 | n/a | n/a | 91% |
| 118 247 | 33 | n/a | n/a | 85% |
| 118 288 | 35 | n/a | n/a | 93% |
| 118 321 | 35 | n/a | n/a | 95% |
| 118 355 | 30 | n/a | n/a | 95% |
| 118 404 | 50 | n/a | n/a | 96% |
| 118 429 | 29 | n/a | n/a | 92% |
| 118 453 | 40 | n/a | n/a | 95% |
| 118 499 | 43 | n/a | n/a | 93% |
| 118 500 | 50 | n/a | 50 | 83% |
| 118 511 | 35 | n/a | n/a | 90% |
| 118 707 | 29.03 | n/a | 29 | 84% |
| 118 747 | 64 | n/a | n/a | 90% |
| 118 770 | 30 | 30 | n/a | 84% |
| 118 800 | 35 | n/a | n/a | 94% |
| 118 811 | 30 | 30 | 30 | 93% |
| 118 848 | 27 | n/a | 27 | 94% |
| 118 866 | 55 | n/a | n/a | 87% |
| 118 877 | 34 | n/a | n/a | 85% |
| 118 878 | 40 | n/a | 40 | 89% |
| 118 888 | 56 | 46 | 30 | 92% |
| 118 888 Wales | 58 | 48 | 30 | 98% |

⁴⁷ Base: All standard calls (c200 to each provider), November 2004, MORI survey

⁴⁸ Note calls to 118 111 from One.tel are free

Figure 32 Comparison of costs (in pence) between mobile networks across all individual DQ operators where available (based on average call duration)⁴⁹

| DQ No. | Orange | O2 | Tmobile | Vodafone | Virgin | '3' | Accuracy |
|-----------------------------|---------------|-----------|----------------|-----------------|---------------|------------|-----------------|
| 118 000 | 59 | 65 | 100 | 75 | 100 | 75 | 83% |
| 118 080 | 60 | 65 | n/a | 180 | n/a | 75 | 85% |
| 118 099 | 60 | 50 | 65 | 50 | 65 | 50 | 88% |
| 118 111⁵⁰ | 60 | 80 | 65 | 50 | 65 | 50 | 86% |
| 118 114 | n/a | 80 | 65 | n/a | 65 | 50 | 92% |
| 118 118 | 85 | 65 | 75 | 84 | 75 | 93 | 94% |
| 118 119 | 85 | 65 | 65 | 65 | 65 | 82 | 93% |
| 118 180 | n/a | 65 | n/a | n/a | n/a | n/a | 92% |
| 118 212 | 60 | 65 | n/a | 70 | n/a | 50 | 91% |
| 118 247 | 60 | 65 | 65 | 49 | 65 | 50 | 85% |
| 118 288 | 60 | 50 | 75 | 50 | 75 | 50 | 93% |
| 118 321 | 60 | 80 | 65 | n/a | 65 | 50 | 95% |
| 118 355 | 60 | 50 | 65 | n/a | 65 | 50 | 95% |
| 118 404 | 85 | 65 | 75 | 66 | 75 | 83 | 96% |
| 118 429 | 60 | 65 | 65 | 35 | 65 | 75 | 92% |
| 118 453 | 60 | 65 | 65 | 73 | 65 | n/a | 95% |
| 118 499 | 200 | 65 | 65 | 64 | 65 | n/a | 93% |
| 118 500 | 85 | 43 | 65 | 67 | 65 | 83 | 83% |
| 118 511 | 60 | 80 | n/a | 60 | n/a | 50 | 90% |
| 118 707 | 85 | 65 | 65 | 62 | 65 | 50 | 84% |
| 118 747 | 85 | 100 | n/a | 75 | n/a | n/a | 90% |
| 118 770 | n/a | 50 | n/a | n/a | n/a | n/a | 84% |
| 118 800 | 60 | 65 | 65 | 68 | 65 | 85 | 94% |
| 118 811 | 60 | 50 | n/a | 84 | 65 | 50 | 93% |
| 118 848 | 60 | 50 | n/a | 55 | n/a | 50 | 94% |
| 118 866 | 60 | 65 | 65 | 67 | 65 | 84 | 87% |
| 118 877 | 60 | 65 | 65 | 50 | 65 | 86 | 85% |
| 118 878 | n/a | n/a | n/a | n/a | n/a | n/a | 89% |
| 118 888 | 60 | 65 | 65 | 60 | 60 | 88 | 92% |
| 118 888 Wales | 60 | 65 | 65 | 60 | 60 | 98 | 98% |

⁴⁹ Base: All standard calls (c200 to each provider), November 2004, MORI survey

⁵⁰ Note calls to 118 111 from One.tel are free

Section 6

Methodology

Mystery Shopping of DQ providers

- 6.1 For the initial round of mystery shopping, conducted by Oftel in October and November 2003, 30 national DQ services were selected. The selection process was based on the following criteria:
- Numbers that appeared at that time on the 'new directory enquiries' website or 192 recorded message;
 - Complaints received by Oftel/ICSTIS;
 - High profile press coverage;
 - Alternative services offered within provider (i.e. pence per minute charging versus flat rate / Welsh versus English);
- 6.2 The selected DQ services were re-assessed by Ofcom for eligibility in April 2004, and re-assessed again for the November 2004 wave.

Consultation on methodology

- 6.3 Prior to Ofcom's initial round of mystery shopping conducted in April 2004, the methodology was re-assessed. Ofcom consulted all DQ providers that Ofcom proposed to test within the study on the proposed methodology. All comments received were considered in the final design and a final copy of the methodology was circulated prior to fieldwork. The same methodology was applied to the study conducted in November 2004.

Expansion of April 2004 study to include text-back and call connect

- 6.4 In the latest study (November 2004) call connect and text-back were also tested where DQ providers advised Ofcom that they offered the service, or where services were advertised to the public. In total, 14 DQ providers were assessed on the provision of charging information when using the call connect service and 12 DQ providers were assessed on the accuracy of numbers provided via text-back. The services tested are detailed in table 1.

Table 1. DQ provider tested on each service⁵¹

| | DQ Provider | Standard | Call connect | Text-back |
|----|-----------------------------------|--------------------|--------------------|--------------------|
| 1 | 118 000 – Orange | ✓ | ✓ | ✓ |
| 2 | 118 080 – Simunix | ✓ | ✓ | ✓ |
| 3 | 118 099 - Cable&Wireless | ✓ | | |
| 4 | 118 111 - One.tel | ✓ | | |
| 5 | 118 114 – Opal | ✓ | | |
| 6 | 118 118 - The Number | ✓ | ✓ | ✓ |
| 7 | 118 119 - 192.com | ✓ | ✓ | |
| 8 | 118 180 - Telewest | ✓ | ✓ | |
| 9 | 118 212 – Maureen | ✓ | ✓ | ✓ |
| 10 | 118 247 – Yell | ✓ | ✓ | ✓ |
| 11 | 118 288 – Kingston | ✓ | | |
| 12 | 118 321 – Tesco | ✓ | | |
| 13 | 118 355 – 11 88 66 Ltd | ✓ | | |
| 14 | 118 404 - BT (Welsh) | ✓ | ✓ | ✓ |
| 15 | 118 429 - 118 GAY | ✓ | | |
| 16 | 118 453 – Freedom | ✓ | | ✓ |
| 17 | 118 499 - Share Charity | ✓ | | |
| 18 | 118 500 – BT | ✓ | ✓ | ✓ |
| 19 | 118 511 - British Gas | ✓ | | |
| 20 | 118 707 – BT | ✓ | | |
| 21 | 118 747 – UK Directory Assistance | ✓ | ✓ | |
| 22 | 118 770 - Telewest | ✓ | | |
| 23 | 118 800 - Directory Enquiries UK | ✓ | ✓ | ✓ |
| 24 | 118 811 - The Number | ✓ | | |
| 25 | 118 848 - Conduit | ✓ | | ✓ |
| 26 | 11 88 66 - 11 88 66 Ltd | ✓ | ✓ | ✓ |
| 27 | 118 877 - Telco Global | ✓ | ✓ | |
| 28 | 118 878 - NTL | ✓ | | |
| 29 | 11 88 88 - Conduit | ✓ | ✓ | ✓ |
| 30 | 11 88 88 – Conduit (Welsh) | ✓ | | |
| | | 30 in total | 14 in total | 12 in total |

Conducting the mystery shopping – process & quality

6.5 All providers were given the opportunity to provide Ofcom, in the strictest confidence, with details of their DQ call volumes in order for Ofcom to weight the overall accuracy score based on approximate market shares. The industry also provided Ofcom with details of the proportion of calls requesting business and residential numbers, and the split of day-time versus evening, late night, and weekend calls. In addition, information was provided on the proportion of calls that were answered in less than 60 seconds, and in 60 or more seconds. This information was used to inform the methodology and to ensure that the calls made during the mystery shopping exercise were consistent with the nature, duration and profile of the actual requests received by DQ providers on a day-to-day basis. The industry was aware that Ofcom and ICSTIS were conducting a further mystery shopping exercise, but was not aware of the precise timing and details, in order to protect the study's objectivity.

⁵¹ c200 calls made to each standard DQ provider, 50 additional calls made testing call connect and 50 calls testing text-back services where available, Oct-Nov 2004

- 6.6 All calls were conducted in accordance with the mystery shopping guidelines outlined by the Market Research Society and ESOMAR. Callers did not reveal their identities either during the call or at the end, to ensure the continued objectivity of the whole research project.
- 6.7 Calls were initially recorded on paper scripts which allowed flexibility in the order in which questions were posed, answered and recorded. During the call, all time information was recorded using digital clocks and measured to the nearest second. Data recorded during each call were immediately transferred on to a CATI (Computer Aided Telephone Interviewing) system from which subsequent analysis was run.
- 6.8 The majority of calls were made from MORI's telephone centre in Scotland. Calls were made from landlines. Where DQ providers offered a Welsh language service, Welsh speakers were used. Text-back requests were made using mobile phones from each of the six main mobile networks: Orange, Vodafone, O2, T-Mobile, 3 and Virgin, with the exception of 118 848 which can only be called from the Vodafone network (all 50 calls were made using Vodafone mobiles) and 118 212 and 118 747 which cannot be called from the Virgin network (requests were divided between the remaining five networks).
- 6.9 For Ofcom's DQ mystery shopping exercises, MORI ensured that its PBX (Private Branch Exchange) was programmed to insert the prefix 141 automatically on all outgoing calls to withhold the originating number (also known as the 'presentation CLI'). This procedure is in place to protect the anonymity of callers and to retain the 'mystery' element of mystery shopping.

Provision of numbers to be requested

- 6.10 All numbers to be requested were provided from OSIS, the central directory database for all residential and business landline numbers. This is part of BT's Wholesale Directory Services operation. Because of concerns that BT might be able to favour its own DQ service, BT signed a confidentiality undertaking in respect of the information which it handled relating to the mystery shopping exercise.
- 6.11 Requests made in the November 2004 study were the same as those made in the April 2004 study except where the telephone numbers had ceased to exist on the OSIS database during the period between the two studies. For this reason details of two business requests were replaced.
- 6.12 On completion of fieldwork all numbers were re-verified with OSIS. Three residential telephone requests used during the research became unavailable during fieldwork, and as such data for these scenarios were discounted in all cases, this resulted in a total reduction of 390 residential requests.
- 6.13 In the case of business requests, if the number provided did not match the number (or numbers) expected, they were checked (by calling them) to ascertain whether or not the number was a suitable alternative. In addition, some DQ providers have agreements with some corporate customers with regard to their preferred number/s to be given out to consumers.
- 6.14 Ofcom has taken this into account in its analysis of the overall accuracy of the market and in particular the accuracy of business requests. Ofcom has defined positive outcomes in two ways:

- **'specific accuracy'** – this measure replicates Ofcom's April 2004 definition 'a request results in the correct number and in the case of business requests the number reaches the requested department'
- **'general accuracy'** – 'a request results in the correct number and in the case of business requests the number reaches the requested business but *not necessarily* the requested department'. For a number to be acceptable within the definition of 'general accuracy' the telephone number given by the DQ operator must be able to be transferred to the requested department *within the same call*.

Call profile

6.15 To attempt to reflect the approximate average profile of calls received by directory enquiry call handlers, calls in this study were made to DQ operators at different times throughout the day and at weekends. The times were as follows:

- Daytime (9am – 5pm) c61%
- Evening (5pm – 10pm) c21%
- Late Night (10pm – midnight) c2%
- Weekends (10am – 6pm) c16%

6.16 In total 5,607 standard requests are included in the data (taking into account those data that were excluded due to the re-verification process). These were made, spread across 30 national DQ numbers, at different times of the day (weekdays and weekends).

6.17 200 standard requests were made to each provider (100 business and 100 residential requests). In the case of the calls requesting call connect, 50 additional requests were made to each provider that offers this service, and to test the accuracy of text-back 50 additional requests were made to each provider offering this service.

6.18 Each call, in terms of number requested, time of day and day of week called, was replicated for each of the 30 providers to ensure comparability across the data collection. All requests were repeated on average four times (with a maximum of five and a minimum of two times) to each provider.

6.19 The scenarios used in the study were:

- *25 different business requests*: requesting the telephone number of a UK business. A range of businesses spread across the country were requested.
- *25 different residential requests*: the telephone number of a UK resident, giving the full name and address. A geographic spread of numbers was requested.
- *For call connect and text back calls*, a further 13 different business requests and 12 different residential requests were used. Again, a geographic spread of numbers was requested.

6.20 Both business and residential scenarios were designed in the April 2004 study to be completed in the timings specified above by the market: 'easy' less than 60 seconds, 'difficult' at least 60 seconds. Within both the business and residential sample, call requests were evenly split between 'easy' and 'difficult' scenarios. The study was designed in this way to help highlight any potential

differences in performance between providers, and to improve the accuracy of statistical significance tests.

Definition of 'difficult' and 'easy' requests

- 6.21 'Difficult' requests consisted of either difficult spellings or unusual businesses, and cases where information was withheld from the call operator until prompted. *For example a 'difficult' call would take the form: "Can I have the number for out-patients enquiries at Clare Park Hospital?" Then if prompted, giving the town (Farnham) and street (Crandall Lane) and that it is a BUPA hospital.*
- 6.22 For 'easy' calls, all information was provided to the call handler up front. *An 'easy' business call would have been to ask for "Royal Mail customer services".*
- 6.23 The same requests were asked in the same way, across all DQ services tested. For 'difficult' requests where information was withheld until prompted, call handler efficiency impacts the flow of the request (ie. different call handlers may ask for different information).

Weighting the data for individual providers' scores

- 6.24 The overall individual DQ service score is weighted to the known profile of the approximate business and residential split only (87% of requests to 118 numbers are business requests and 13% are residential requests). Residential requests were over-sampled in the survey to produce a sufficiently robust sample to allow analysis of these results. The combined results were re-weighted to be representative of the average call profile in terms of requests for business and residential numbers, therefore the overall results closely resemble the results for business number requests.
- 6.25 Where performance of residential requests and business are compared across providers, un-weighted data are shown.

Overall DQ market accuracy score

- 6.26 Where overall results for the DQ market as a whole are stated, these results have been weighted to the known profile of all calls made to 118 numbers in terms of business and residential requests, length of the call and market share of each individual DQ operator. The table below shows the factors and the relative percentages to which the *overall* data have been weighted - based on information provided by the industry to Ofcom.

Table 2. Known percentage of calls across the DQ market

| Factor | Known percentage of calls across the DQ market |
|---|---|
| <i>Requests for business numbers</i> | 87 |
| - information given in under 60s | 64 |
| - information given in 60 plus seconds | 23 |
| <i>Requests for residential numbers</i> | 13 |
| - information given in under 60s | 9 |
| - information given in 60 plus seconds | 4 |
| Individual market share ⁵² | Confidential |

6.27 Data shown for textback and call connect is unweighted.

Pricing structures

6.28 Prices have been calculated using information direct from individual DQ numbers (where provided), across all the major telephone networks/ carriers.

6.29 A range of different pricing structures exist and prices are compared on different call types:

- Flat fee for whole call regardless of length;
- Initial connection charge (which includes first minute of call) + pence per minute charge for remainder of call (charged per second);
- Initial connection charge (which does not include first minute of call) + pence per minute charge for whole call (charged per second);
- No connection charge and pence per minute charge for whole call (charged per second).

6.30 In addition to the varying prices for standard DQ services, some providers focus on particular business models:

- cheaper calls from certain networks/service providers;
- cheaper call connect rates (for example reflected in lower pence per minute rates following an initial connection charge); and

⁵² This confidential information was based on call volume data from the DQ providers. As not all information was available at the time, weights for each individual DQ provider were calculated from the information available, including the top providers by market share. The remaining market share was assumed to be evenly spread across the remaining 2 providers

Consumer Attitudes Survey methodology and materials

6.31 Questions were placed on the MORI Omnibus, the regular MORI survey among the general public. A nationally representative quota sample of 2,122 adults (aged 15 and over) was interviewed throughout the UK by MORI in 189 different sampling points. Interviews were conducted face to face, in respondents' homes, using CAPI (Computer Assisted Personal Interviewing) between 18 and 23 November 2004.

Further DQ research

6.32 As outlined in the main report, Ofcom will continue to monitor the DQ market over the next 12 to 18 months. Further research will be subject to some methodological changes, all of which will be made following further discussion with the DQ industry. Outlined below are some of the key changes Ofcom will propose and review with DQ providers:

- Ofcom's initial wave of research conducted in April 2004 was designed to highlight whether issues surrounding the provision of inaccurate numbers was related to database errors or call handling. For this reason, each of the 25 business and 25 residential requests were made to each service an average of four times each, spread over different times and days. Results indicate that inaccuracy is more likely to be linked to the efficiency of call handling as opposed to the errors on individual services, as no request was unfulfilled or incorrect on all occasions. Going forward Ofcom is also considering making only one request for each number. Furthermore, Ofcom will be refreshing the scenarios in further studies.
- While 100 business and 100 residential calls were made, post-fieldwork some residential numbers were removed from OSIS at the consumers' request. Therefore, Ofcom removed these requests from all DQ services scenarios which resulted in a total reduction of 390 residential requests. Within further waves of research Ofcom is considering increasing the number of scenarios to ensure a minimum of 100 business and 100 residential requests for analysis.
- For Ofcom's DQ mystery shopping exercises, MORI ensure that its PBX (Private Branch Exchange) was programmed to insert the prefix 141 automatically on all outgoing calls to withhold the originating number (also known as the 'presentation CLI'). This procedure is in place to protect the anonymity of callers and to retain the 'mystery' element of mystery shopping. However, there may be additional methodological changes such as extending the fieldwork period, and changing the method used for making calls to further ensure no provider is able to identify any mystery shopping calls being made.

Annex A

Additional cost and time tabulations from mystery shopping exercise

The following tables are in ascending order of the DQ numbers, not ranked on any other criteria.

Table 3 Average time (seconds) from end of dialling number and being answered, to obtaining information (chargeable time) – compared with overall accuracy and cost on the BT network⁵³

| DQ No. | DQ Provider | Time taken (seconds) | Total cost (pence) | Overall 'specific accuracy' (all) |
|---------------|-------------------------|---------------------------------|-------------------------------|--|
| 118 000 | Orange | 34 | 49p | 83% |
| 118 080 | Simunix | 54 | 50p | 85% |
| 118 099 | Cable and Wireless | 41 | 35p | 88% |
| 118 111 | One.tel | 42 | 35p | 86% |
| 118 114 | Opal Telecom | 38 | 40p | 92% |
| 118 118 | The Number UK Ltd | 42 | 55p | 94% |
| 118 119 | 192.com | 38 | 44p | 93% |
| 118 180 | Telewest | 48 | 49p | 92% |
| 118 212 | Maureen | 45 | 40p | 91% |
| 118 247 | Yell Ltd | 49 | 33p | 85% |
| 118 288 | Kingston | 36 | 35p | 93% |
| 118 321 | Tesco | 36 | 35p | 95% |
| 118 355 | 11 88 66 Ltd | 37 | 30p | 95% |
| 118 404 | BT (Welsh) | 39 | 50p | 96% |
| 118 429 | 118 GAY | 35 | 29p | 92% |
| 118 453 | Freedom Discovery | 50 | 40p | 95% |
| 118 499 | Share Charity | 36 | 43p | 93% |
| 118 500 | BT | 40 | 50p | 83% |
| 118 511 | British Gas | 38 | 35p | 90% |
| 118 707 | BT | 33 | 29.03p | 84% |
| 118 747 | UK Directory Assistance | 38 | 64p | 90% |
| 118 770 | Telewest | 39 | 30p | 84% |
| 118 800 | Directory Enquiries UK | 42 | 35p | 94% |
| 118 811 | The Number UK Ltd | 42 | 30p | 93% |
| 118 848 | Conduit | 42 | 27p | 94% |
| 118 866 | 11 88 66 Ltd | 41 | 55p | 87% |

⁵³ Base: All requests 5,607, November 2004p

Evaluation of Directory Enquiry Services

| | | | | |
|----------------|------------------------|----|------------|-----|
| 118 877 | Telco Global | 43 | 34p | 85% |
| 118 878 | ntl | 37 | 40p | 89% |
| 118 888 | Conduit | 46 | 56p | 92% |
| 118 888 | Conduit (Welsh) | 58 | 58p | 98% |

Table 4 Average time (seconds) from end of dialling number and being answered, to obtaining information (chargeable time) – compared with overall accuracy and cost on the BT network for residential requests⁵⁴

| DQ No. | DQ provider | Time taken (seconds) | Total cost (pence) | Overall 'specific accuracy' (residential) |
|---------------|----------------------------|---------------------------------|-------------------------------|--|
| 118 000 | Orange | 45 | 49p | 89% |
| 118 080 | Simunix | 62 | 52p | 84% |
| 118 099 | Cable and Wireless | 48 | 35p | 85% |
| 118 111 | One.tel | 46 | 35p | 86% |
| 118 114 | Opal Telecom | 43 | 40p | 89% |
| 118 118 | The Number UK Ltd | 53 | 57p | 87% |
| 118 119 | 192.com | 49 | 50p | 85% |
| 118 180 | Telewest | 55 | 53p | 91% |
| 118 212 | Maureen | 48 | 41p | 87% |
| 118 247 | Yell Ltd | 52 | 35p | 89% |
| 118 288 | Kingston | 47 | 35p | 89% |
| 118 321 | Tesco | 44 | 35p | 85% |
| 118 355 | 11 88 66 Ltd | 39 | 30p | 92% |
| 118 404 | BT (Welsh) | 49 | 52p | 93% |
| 118 429 | 118 GAY | 50 | 42p | 82% |
| 118 453 | Freedom Discovery | 50 | 40p | 92% |
| 118 499 | Share Charity | 45 | 48p | 83% |
| 118 500 | BT | 45 | 51p | 71% |
| 118 511 | British Gas | 49 | 35p | 86% |
| 118 707 | BT | 42 | 29.03p | 79% |
| 118 747 | UK Directory Assistance | 48 | 65p | 83% |
| 118 770 | Telewest | 46 | 30p | 86% |
| 118 800 | Directory Enquiries UK | 45 | 36p | 92% |
| 118 811 | The Number UK Ltd | 53 | 30p | 90% |
| 118 848 | Conduit | 50 | 27p | 94% |
| 118 866 | 11 88 66 Ltd | 45 | 56p | 86% |
| 118 877 | Telco Global | 51 | 34p | 89% |
| 118 878 | Ntl | 44 | 40p | 86% |
| 118 888 | Conduit | 53 | 57p | 93% |
| 118 888 | Conduit (Welsh) | 60 | 58p | 99% |

⁵⁴ Base: All residential requests 2,608, November 2004

Table 5 Average time (seconds) from end of dialling number and being answered, to obtaining information (chargeable time) – compared with overall accuracy and cost on the BT network for business requests⁵⁵

| DQ No. | DQ provider | Time taken (seconds) | Total cost (pence) | Overall 'specific accuracy' (business) |
|---------------|-------------------------|---------------------------------|-------------------------------|---|
| 118 000 | Orange | 32 | 49p | 82% |
| 118 080 | Simunix | 53 | 50p | 85% |
| 118 099 | Cable and Wireless | 40 | 35p | 88% |
| 118 111 | One.tel | 41 | 35p | 86% |
| 118 114 | Opal Telecom | 37 | 40p | 93% |
| 118 118 | The Number UK Ltd | 40 | 55p | 95% |
| 118 119 | 192.com | 37 | 44p | 94% |
| 118 180 | Telewest | 47 | 49p | 92% |
| 118 212 | Maureen | 45 | 40p | 92% |
| 118 247 | Yell Ltd | 48 | 32p | 84% |
| 118 288 | Kingston | 34 | 35p | 94% |
| 118 321 | Tesco | 35 | 35p | 96% |
| 118 355 | 11 88 66 Ltd | 37 | 30p | 96% |
| 118 404 | BT (Welsh) | 38 | 50p | 96% |
| 118 429 | 118 GAY | 33 | 28p | 94% |
| 118 453 | Freedom Discovery | 50 | 40p | 95% |
| 118 499 | Share Charity | 34 | 42p | 95% |
| 118 500 | BT | 39 | 50p | 85% |
| 118 511 | British Gas | 36 | 35p | 90% |
| 118 707 | BT | 32 | 29.03p | 85% |
| 118 747 | UK Directory Assistance | 37 | 64p | 91% |
| 118 770 | Telewest | 38 | 30p | 84% |
| 118 800 | Directory Enquiries UK | 42 | 35p | 94% |
| 118 811 | The Number UK Ltd | 41 | 30p | 93% |
| 118 848 | Conduit | 41 | 27p | 94% |
| 118 866 | 11 88 66 Ltd | 41 | 55p | 87% |
| 118 877 | Telco Global | 42 | 34p | 85% |
| 118 878 | ntl | 36 | 40p | 89% |
| 118 888 | Conduit | 45 | 56p | 92% |
| 118 888 | Conduit (Welsh) | 58 | 58p | 98% |

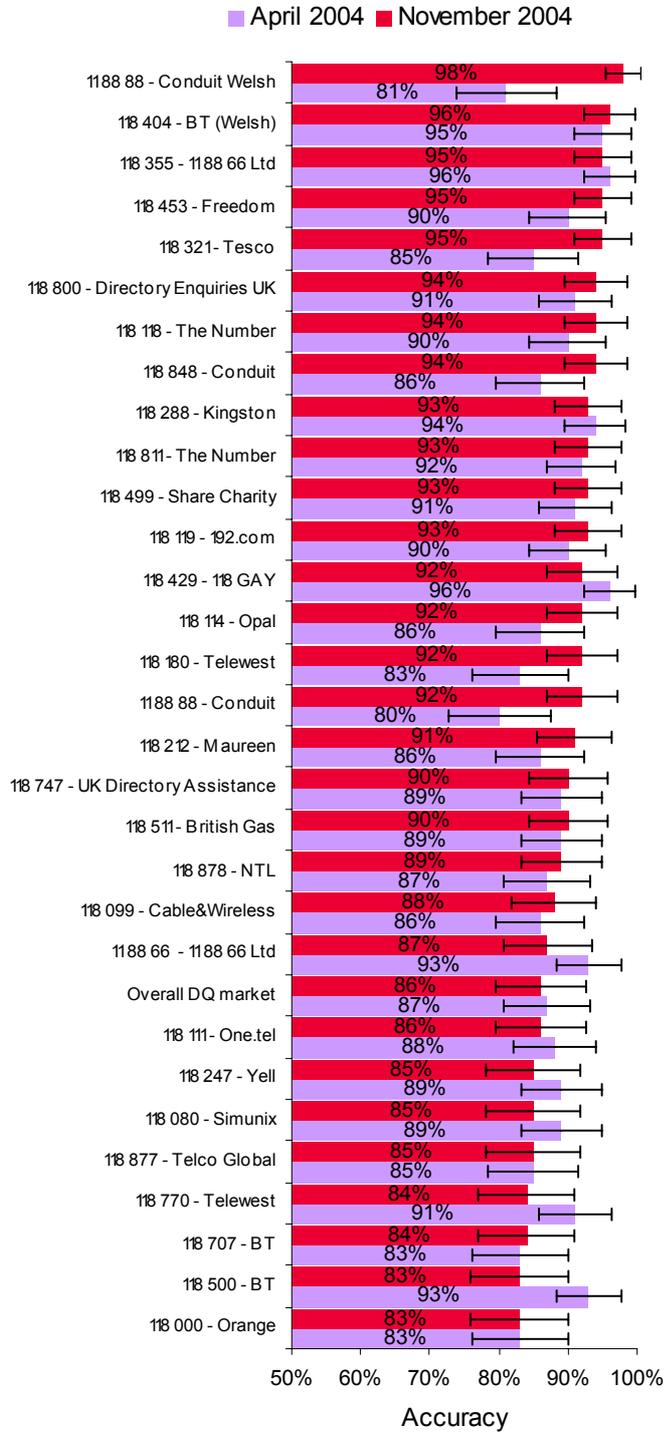
⁵⁵ Base: All business requests 2,999, November 2004

Annex B

Trend in 'specific accuracy' levels including error margins

Accuracy of DQ providers: April 2004 vs November 2004⁵⁶

Error bars show range at 99% confidence interval



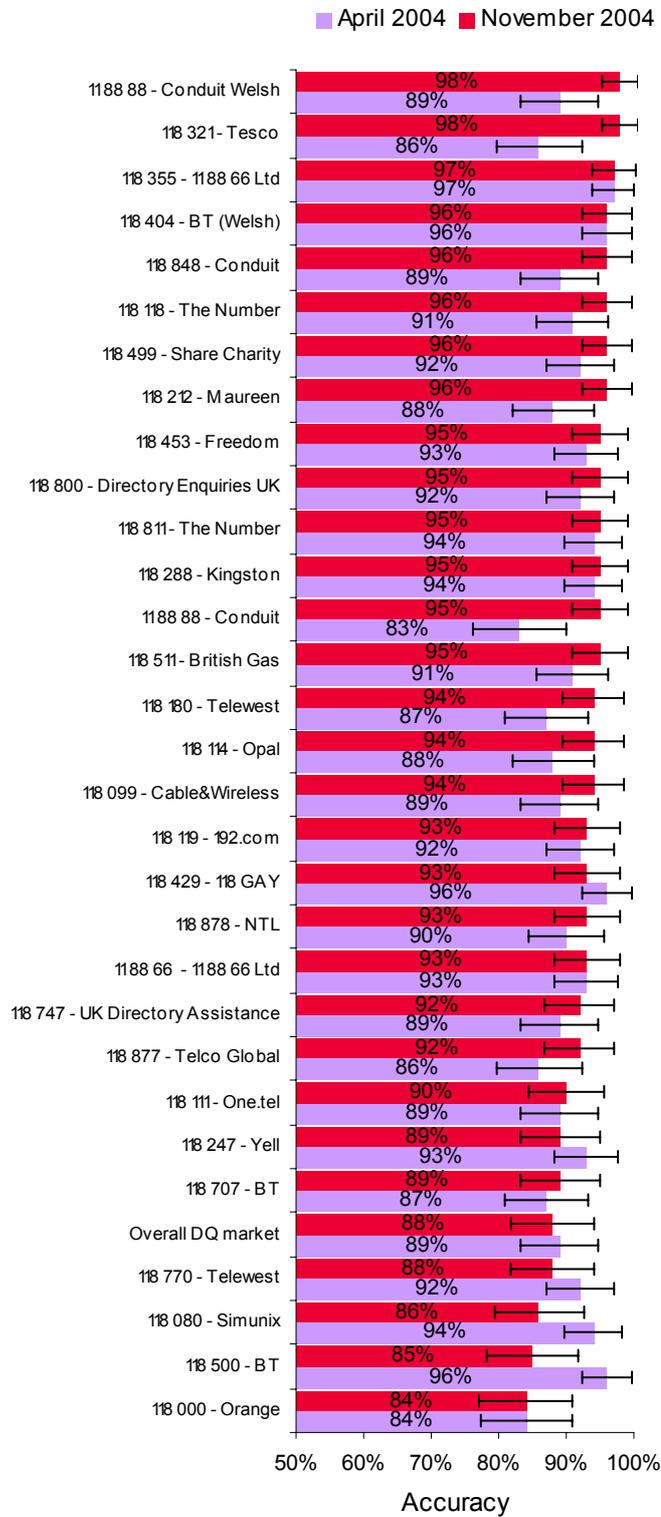
⁵⁶ Base: All standard calls (c.200 to each provider), April 2004, November 2004

Annex C

Trend in 'general accuracy' levels including error margins

Accuracy of DQ providers: April 2004 vs November 2004⁵⁷

Error bars show range at 99% confidence interval



⁵⁷ Base: All standard calls (c. 200 to each provider), April 2004, November 2004

Annex D

Consumer attitudes Questionnaire

ASKED OF ALL

SHOWCARD Which of these, if any, do you personally use...? and which others?

MULTICODE OK

Mobile phone

Text messaging (SMS) on a mobile phone

Picture messaging (MMS) on a mobile phone

PC - desktop, laptop or other computer at home

PC - desktop, laptop or other computer at work, place of study or elsewhere

Internet at home

Internet at work, place of study or elsewhere

Internet at home via a high-speed, always-on 'broadband' connection (e.g. via ADSL or cable modem)

Digital TV e.g. satellite digital (Sky Digital), cable digital (ntl, Telewest) or through your existing aerial (Freeview or other non-contract TV adapter box)

Interactive services on digital TV (e.g. games, shopping, banking or extra information accessed by pressing the 'red button' on your remote control)

DVD player (built into a computer or stand alone)

Digital radio channels through a specialist DAB receiver, through a digital television or over the internet

None of these

Don't know

ASKED OF ALL

Do you have a telephone in your home?

Yes, have a telephone

Yes, but ex directory

No

Refused

AWARENESS, USE AND OPINION OF NEW DQ SERVICES

ASK ALL

Q1. SHOWCARD Which of these best describes how often, if at all, you phone each of the following directory enquiry services from either a mobile or a fixed phone? SINGLE CODE.

- (a) Any national UK directory enquiries?
- (b) International Directory enquiries?

More than 5 times a week
2 to 5 times a week
At least once a week
At least once a month
At least once a year
Less frequently than once a year
Never
Don't know

ASK ALL WITH A MOBILE AND FIXED PHONE THAT EVER USE NATIONAL UK DQ SERVICES

Q2. SHOWCARD Do you call national UK directory enquiry services mainly from your fixed phone, your mobile phone or both about the same? SINGLE CODE

Mainly from fixed
Mainly from mobile
Both about the same
Don't know

INTERVIEWER READ OUT: The next few questions relate to NATIONAL directory enquiry services only.

ASK ALL

Q3. Which, if any, national UK directory enquiry numbers can you recall?
DO NOT READ OUT. CODE ALL THAT APPLY. IF GIVEN NAME, PROMPT FOR NUMBER. IF NUMBER NOT KNOWN, CODE BY NAME.

| | |
|---------|------------------------|
| 192 | |
| 118 000 | Orange |
| 118 080 | Simunix |
| 118 099 | Cable&Wireless |
| 118 111 | One.tel |
| 118 114 | Opal |
| 118 118 | The Number |
| 118 119 | 192.com |
| 118 141 | |
| 118 180 | Telewest |
| 118 212 | Maureen |
| 118 247 | Yell |
| 118 288 | Kingston |
| 118 321 | Tesco |
| 118 355 | Telegate |
| 118 404 | BT (Welsh) |
| 118 429 | 118 GAY |
| 118 453 | Freedom |
| 118 499 | Share Charity |
| 118 500 | BT |
| 118 505 | |
| 118 511 | British Gas |
| 118 707 | BT |
| 118 747 | BT |
| 118 770 | Telewest |
| 118 800 | Directory Enquiries UK |

118 811 The Number
 118 848 Conduit
 118 877 Telco Global
 118 878 NTL
 11 88 66 Telegate
 11 88 88 Conduit
 Other 118 number (specify)
 Other NON 118 number (specify)
 None
 Don't know

ASK ALL THAT USE A NATIONAL UK DIRECTORY ENQUIRY AT Q1

Q4. Which directory enquiry numbers have you called in the last 12 months? And can you tell me if this was from a fixed phone, mobile phone or whether you have called that number from both? DO NOT PROMPT

- a) called from a fixed line only
- b) called from a mobile only
- c) called from both fixed line and mobile
- d) don't know/can't remember

IF GIVEN NAME, PROMPT FOR NUMBER. IF NUMBER NOT KNOWN, CODE BY NAME.

192
 118 000 Orange
 118 080 Simunix
 118 099 Cable&Wireless
 118 111 One.tel
 118 114 Opal
 118 118 The Number
 118 119 192.com
 118 141
 118 180 Telewest
 118 212 Maureen
 118 247 Yell
 118 288 Kingston
 118 321 Tesco
 118 355 Telegate
 118 404 BT (Welsh)
 118 429 118 GAY
 118 453 Freedom
 118 499 Share Charity
 118 500 BT
 118 505
 118 511 British Gas
 118 707 BT
 118 747 BT
 118 770 Telewest
 118 800 Directory Enquiries UK
 118 811 The Number
 118 848 Conduit
 118 877 Telco Global
 118 878 NTL
 11 88 66 Telegate
 11 88 88 Conduit
 Other 118 number (specify)
 Other NON 118 number (specify)
 None
 Don't know
 Can't remember which I've called
 Can't remember whether I've called any of them
 Have not called any of them
 Don't know

ASK ALL THAT USE A NATIONAL UK DIRECTORY ENQUIRY AT Q1

Q5. SHOWCARD And which other directory enquiry numbers on this list have you called in the last 12 months? And can you tell me whether this was from a fixed phone, mobile phone or whether you have called that number from both?

REDUCE LIST TO EXCLUDE THOSE MENTIONED AT Q4

- a) called from a fixed line only
- b) called from a mobile only
- c) called from both fixed line and mobile
- d) Don't know/can't remember but have called it

IF GIVEN NAME, PROMPT FOR NUMBER. IF NUMBER NOT KNOWN, CODE BY NAME.

| | |
|--|------------------------|
| 192 | |
| 118 000 | Orange |
| 118 080 | Simunix |
| 118 099 | Cable&Wireless |
| 118 111 | One.tel |
| 118 114 | Opal |
| 118 118 | The Number |
| 118 119 | 192.com |
| 118 141 | |
| 118 180 | Telewest |
| 118 212 | Maureen |
| 118 247 | Yell |
| 118 288 | Kingston |
| 118 321 | Tesco |
| 118 355 | Telegate |
| 118 404 | BT (Welsh) |
| 118 429 | 118 GAY |
| 118 453 | Freedom |
| 118 499 | Share Charity |
| 118 500 | BT |
| 118 505 | |
| 118 511 | British Gas |
| 118 707 | BT |
| 118 747 | BT |
| 118 770 | Telewest |
| 118 800 | Directory Enquiries UK |
| 118 811 | The Number |
| 118 848 | Conduit |
| 118 877 | Telco Global |
| 118 878 | NTL |
| 11 88 66 | Telegate |
| 11 88 88 | Conduit |
| Other 118 number (specify) | |
| Other NON 118 number (specify) | |
| None | |
| Don't know | |
| Can't remember which I've called | |
| Can't remember whether I've called any of them | |
| Have not called any of them | |
| Don't know | |

ASK ALL WHO HAVE CALLED MORE THAN ONE LISTED NUMBER FROM FIXED LINE AT Q4A OR Q5A

Q6. SHOWCARD And which one of these numbers do you call most often from your fixed line?

SINGLE CODE ONLY. REDUCED LIST TO ONLY THOSE MENTIONED AT Q4A OR Q5A

ASK ALL WHO HAVE CALLED MORE THAN ONE LISTED NUMBER FROM MOBILE PHONE AT Q4B OR Q5B

Q7. SHOWCARD And which one of these numbers do you call most often from your mobile phone? SINGLE CODE ONLY. REDUCED LIST TO ONLY THOSE MENTIONED AT Q4B OR Q5B

| | |
|---|------------------------|
| 192 | |
| 118 000 | Orange |
| 118 080 | Simunix |
| 118 099 | Cable&Wireless |
| 118 111 | One.tel |
| 118 114 | Opal |
| 118 118 | The Number |
| 118 119 | 192.com |
| 118 141 | |
| 118 180 | Telewest |
| 118 212 | Maureen |
| 118 247 | Yell |
| 118 288 | Kingston |
| 118 321 | Tesco |
| 118 355 | Telegate |
| 118 404 | BT (Welsh) |
| 118 429 | 118 GAY |
| 118 453 | Freedom |
| 118 499 | Share Charity |
| 118 500 | BT |
| 118 505 | |
| 118 511 | British Gas |
| 118 707 | BT |
| 118 747 | BT |
| 118 770 | Telewest |
| 118 800 | Directory Enquiries UK |
| 118 811 | The Number |
| 118 848 | Conduit |
| 118 877 | Telco Global |
| 118 878 | NTL |
| 11 88 66 | Telegate |
| 11 88 88 | Conduit |
| Other 118 number | |
| Other NON 118 number | |
| None of them/Not selected one to use most often | |
| Don't know/can't remember | |

ASK ALL WHO USE ONE LISTED NUMBER FROM FIXED MOST OFTEN AT Q6

Q8. Why did you mainly decide to use [insert main number from Q6] from your fixed phone? DO NOT READ OUT. CODE ALL THAT APPLY.

ASK ALL WHO USE ONE LISTED NUMBER FROM MOBILE MOST OFTEN AT Q7

Q9. Why did you mainly decide to use [insert main number from Q7] from your mobile phone? DO NOT READ OUT CODE ALL THAT APPLY

IF CODE 'RECOMMENDED' PROBE WHY, WHAT WAS RECOMMENDED ABOUT THAT SERVICE?

It's the new BT directory enquiries number
 I remembered it from their advertising
 Recommended by a friend/relative/someone else (PROBE WHAT WAS RECOMMENDED)
 It is the cheapest
 It offers the best service
 It offers specific services (e.g. Cinema/TV listings)
 They will connect the call for you
 It was the only one I knew

Just to try it out
Easy to remember
Knowledgeable operators/ agents
Redirected from 192/freephone number
Received in a text message
To have the number text back (CODE ONLY AVAILABLE FOR Q7)
Cheapest call connect service
Other number I tried was engaged
They give you the correct number
Other (specify)
Don't know

ASK ALL WHO CAN REMEMBER THE NUMBERS THEY USED BUT HAVE NOT CHOSEN ONE TO USE MORE FREQUENTLY [MORE THAN ONE CODE AT Q4 OR Q5, AND "NONE OF THEM AT Q7 OR Q6]

Q10. Why did you decide to use those particular numbers?
DO NOT READ OUT. CODE ALL THAT APPLY

It's the new BT directory enquiries number
I remembered it from their advertising
Recommended by a friend/relative/someone else (PROBE WHAT WAS RECOMMENDED)
It is the cheapest
It offers the best service
It offers classified listings
They will connect the call for you
It was the only one I knew
Just to try it out
Easy to remember
Knowledgeable operators/ agents
Received in a text message
To have the number text back (CODE ONLY AVAILBALE FOR Q7)
Cheapest call connect service
Other number I tried was engaged
They give you the correct number/most accurate
To have the number text back to me
Other (specify)
Don't know

ASK ALL

Q11. SHOWCARD And which other national UK directory enquiry providers do you recognise, but have not necessarily called? CODE ALL THAT APPLY.
IF GIVEN NAME, PROMPT FOR NUMBER. IF NUMBER NOT KNOWN, CODE BY NAME.

| | |
|------------|------------------------|
| 192 | |
| 118 000 | Orange |
| 118 080 | Simunix |
| 118 099 | Cable&Wireless |
| 118 111 | One.tel |
| 118 114 | Opal |
| 118 118 | The Number |
| 118 119 | 192.com |
| 118 141 | |
| 118 180 | Telewest |
| 118 212 | Maureen |
| 118 247 | Yell |
| 118 288 | Kingston |
| 118 321 | Tesco |
| 118 355 | Telegate |
| 118 404 | BT (Welsh) |
| 118 429 | 118 GAY |
| 118 453 | Freedom |
| 118 499 | Share Charity |
| 118 500 | BT |
| 118 505 | |
| 118 511 | British Gas |
| 118 707 | BT |
| 118 747 | BT |
| 118 770 | Telewest |
| 118 800 | Directory Enquiries UK |
| 118 811 | The Number |
| 118 848 | Conduit |
| 118 877 | Telco Global |
| 118 878 | NTL |
| 11 88 66 | Telegate |
| 11 88 88 | Conduit |
| None | |
| Don't know | |

ASK ALL WHO USE ONE LISTED NUMBER MOST OFTEN FROM FIXED LINE AT Q6
Q12. SHOWCARD How satisfied are you with the overall service provided by [INSERT
NUMBER CALLED MOST FREQUENTLY FROM FIXED] when calling from your fixed
phone?

Very satisfied
Fairly satisfied
Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied
Don't know/Can't remember

ASK ALL WHO USE ONE LISTED NUMBER MOST OFTEN FROM MOBILE AT Q7
Q13. SHOWCARD How satisfied are you with the overall service provided by [INSERT
NUMBER CALLED MOST FREQUENTLY FROM MOBILE] when calling from your mobile
phone?

Very satisfied
Fairly satisfied
Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied
Don't know/Can't remember

ASK ALL USE ANY 118 NATIONAL DQ SERVICES AT Q4 OR Q5
Q14. SHOWCARD How satisfied are you overall with the services provided by the new 118
providers?
SINGLE CODE ONLY

Very satisfied
Fairly satisfied
Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied
Don't know/Can't remember

ASK ALL USE ANY 118 NATIONAL DQ SERVICES AT Q4 OR Q5
Q15. Do you think the overall service provided by the new 118 numbers is better, worse or
about the same as the old 192 services? SINGLE CODE

118 better
Both about the same
118 worse
Never called 192
Don't know

USE OF ALTERNATIVE METHODS TO OBTAIN NUMBERS

ASK ALL

Q16. What sources of information did you – or do you think you will – use to find out any of the new directory enquiry numbers? DO NOT READ OUT. CODE ALL THAT APPLY.

- No need to, know enough 118 numbers
- Radio advertising
- Television advertising
- Press advertising
- Posters in the street or elsewhere
- Posters at underground stations/on underground trains
- BT Phonebook
- Yellow pages
- Thomson directory
- Other phone book
- Press article
- BT van/vehicle
- BT Payphone
- Other telephone / work telephone
- Payphone – other/unspecified
- Leaflet sent with BT phone book
- Leaflet sent with BT phone bill
- Call BT
- Call my telephone company
- Internet
- Oftel leaflet
- Ask family/friends/colleagues/ask around/word of mouth
- Call operator/100
- Call old number – they'll direct me
- Wait for a leaflet/ information through the post
- Other (specify)
- Not likely to call directory enquiries
- Don't know

ASK ALL

Q17. Since the introduction of the new 118 directory enquiry numbers, would you say you are now calling national directory enquiries more frequently, less frequently or about the same amount as you did before the old directory enquiry number (192) was withdrawn?

READ OUT IF NECESSARY. SINGLE CODE.

- More frequently
- About the same
- Less frequently
- Too early to say
- Don't know

ASK ALL WHO CALL DIRECTORY ENQUIRIES MORE FREQUENTLY THAN THEY DID BEFORE THE OLD NUMBER WAS WITHDRAWN [CODE 1 AT Q17]

Q18. For what reasons do you think that you now call directory enquiries more frequently than you used to? DO NOT READ OUT. CODE ALL THAT APPLY.

- So I can be connected to the number without having to redial
- To get the number emailed to me
- To get the number texted to me
- Store numbers sent by text in mobile
- Because I know about the service / advertising
- To get classified information (such as a taxi service or plumber)
- To get cinema listings
- To get train time information
- To get directions
- To find out what's on television

It's now cheaper/better value than it used to be
Better services offered (unspecified)
Other (specify)
Don't know

ASK ALL WHO CALL DIRECTORY ENQUIRIES LESS FREQUENTLY THAN THEY DID BEFORE THE OLD NUMBER WAS WITHDRAWN [CODE 3 AT Q17]
Q19. For what reasons do you think that you now call directory enquiries less frequently than you used to? DO NOT READ OUT. CODE ALL THAT APPLY.

The old 192 service used to be free
Did not realise there was a charge made for directory enquiries until the new numbers were introduced
The new services are too expensive
Have heard/read about poor service (but not used any of them myself)
Have received poor service and have not called again
Use internet (general) instead
Use internet directory enquiries instead
Store numbers sent by text in mobile
Operators/ agents not knowledgeable
Call centres/ operators/ agents situated overseas
Haven't needed to use it
Can't remember the numbers
Use other methods now (general mention)
Other (specify)
Don't know

ASK ALL

Q20. a) And where, if at all, do you [now – INSERT FOR LESS FREQUENT USERS] look for telephone numbers instead of calling directory enquiries? DO NOT READ OUT. CODE ALL THAT APPLY. IF MENTION MORE THAN ONE METHOD ASK b) Which of these do you use most?

Phone book/printed directory
Internet general
Internet directory enquiry
Friend/colleague/relative
Own records/address book
Mobile phone address book
Other (specify)
Have not needed any telephone numbers
Do not use directory enquiries
Don't know

ASK ALL WHO PICK A SINGLE MOST-USED METHOD AT Q20

Q21. SHOWCARD How satisfied are you with this method of getting the numbers you need?
SINGLE CODE

Very satisfied
Fairly satisfied
Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied
Don't know

COST OF 118 SERVICES

ASK ALL

Q22. SHOWCARD Which of the following statements best describes your understanding of the new 118 directory enquiries numbers? READ OUT. ROTATE. SINGLE CODE ONLY.

All the new numbers charge the same price as each other and offer the same services
The new numbers charge a range of different prices and offer different services
The new numbers charge a range of different prices and all offer the same services
All the new numbers charge the same price as each other and offer different services
Don't know

ASK ALL WHO USE ONE LISTED NUMBER MOST OFTEN FROM FIXED at Q6
Q23. Can you tell me approximately how much you think it costs in total to get one UK residential or business number when you call [insert number] from your fixed line phone at home?

Record value as open numeric answer in pence
Don't know

ASK ALL WHO USE ONE LISTED NUMBER MOST OFTEN FROM FIXED at Q6
Q24. And how do you think this compares to the cost of obtaining a similar number from the old 192 directory enquiry service from your fixed line, is it more expensive, less expensive or about the same cost? SINGLE CODE ONLY

More expensive
About the same cost
Less expensive
Don't know

ASK ALL WHO USE ONE LISTED NUMBER MOST OFTEN FROM MOBILE AT Q7
Q25. Can you tell me approximately how much you think it costs in total to get one UK residential or business number when you call [insert number] from your mobile?

Record value as open numeric answer in pence
Don't know

ASK ALL WHO USE ONE LISTED NUMBER MOST OFTEN FROM MOBILE AT Q7
Q26. And how do you think this compares to the cost of calling the old 192 directory enquiry service from a mobile, is it more expensive, less expensive or about the same cost? SINGLE CODE ONLY

More expensive
About the same cost
Less expensive
Don't know

ASK ALL

Q27. Approximately how much do you think it costs to call the old 192 directory enquiries number from your fixed line phone at home? (ONLY ASK THOSE WITH FIXED) a mobile phone? (ONLY ASK THOSE WITH MOBILE)

DO NOT READ OUT. SINGLE CODE.

Record value as open numeric answer in pence

Don't know

ASK ALL

Q28. Which of the following statements best describes in general how the cost of the new directory enquiry services compares to the cost of the old 192 service? On average ...

READ OUT. ROTATE. SINGLE CODE ONLY.

The new 118 numbers are more expensive than 192

The new 118 numbers are cheaper than 192

The new 118 numbers cost the same as 192

Some of the new 118 numbers are cheaper, some cost the same, and some 118 numbers are more expensive than 192

Don't know

ADDED SERVICES

ASK ALL

Q29. SHOWCARD Many of the new directory enquiry providers offer extra services in addition to just giving you the number you request. Please can you tell me whether or not you have heard of each of the following services listed on this card? CODE ALL THAT APPLY.

Number sent by text to your mobile

Number emailed to you

Onward connection to the number requested

Request for more than one number

Classified searches such as requests for a taxi firm or electrician

Cinema listings

Television listings

Train times

Connect you to a neighbour of someone you know (checking if service still available)

Connect you to someone living at the same address as the person you want to call (checking if service still available)

Providers listing specialist gay services

Service provided in Welsh

None of these

Don't know

Other (DO NOT PUT ON SHOWCARD)

ASK ALL USED NEW DQ SERVICES AND AWARE OF ANY OF THE NEW SERVICES [Q4 OR Q5 AND CODES 1-12 AT Q29]

Q30. SHOWCARD And for each of these, please tell me whether you have used the service? REDUCED LIST OF ALL THOSE MENTIONED AT Q29

- Number sent by text to your mobile
- Number emailed to you
- Onward connection to the number requested
- Request for more than one number
- Classified searches such as requests for a taxi firm or electrician
- Cinema listings
- Television listings
- Train times
- Connect you to a neighbour of someone you know (checking if service still available)
- Connect you to someone living at the same address as the person you want to call (checking if service still available)
- Providers listing specialist gay services
- Service provided in Welsh
- None of these
- Don't know

ASK ALL

Q31. SHOWCARD Please tell me for each of the following services, how likely you are to use them in the next 12 months.

READ OUT. ROTATE. SINGLE CODE FOR EACH.

- Certain to
- Very likely
- Fairly likely
- Fairly unlikely
- Very unlikely
- Certain not to
- Don't know

Standard UK directory enquiry: asking for a UK residential or business telephone number without any other service

- Number sent by text to your mobile
- Number emailed to you
- Onward connection to the number requested
- Requesting more than one number
- Classified searches for specific services such as requests for a taxi firm or electrician
- Cinema listings
- Television listings
- Train times
- Connect you to a neighbour of someone you know
- Connect you to someone living at the same address as the person you want to call
- Providers listing specialist gay services
- Service provided in Welsh

ASK ALL USE NATIONAL DQ SERVICES AND HAVE A MOBILE [AT Q4 OR Q5 AND CODE A AT NEWTT]

Q32. Thinking about the mobile text-back service that is available from some 118 numbers and ignoring the cost of the call to the 118 provider, how much, if anything, do you think you have to pay to have the number text back to you? SINGLE CODE

- Record value as open numeric answer in pence
- Varies by 118 service
- Standard text message charge
- Don't know

ASK ALL USED CALL CONNECT [CODE 3 AT Q30]

Q33. Thinking about the onward call connection service that is available with some 118 numbers, and ignoring the cost of the call to the 118 provider, how much, if anything, do you think you have to pay per minute to continue your call after you have been connected to the number if you are calling from:

your fixed line phone at home? (ONLY ASK THOSE WITH FIXED)
a mobile? (ONLY ASK THOSE WITH MOBILE)

SINGLE CODE FOR EACH

Record value as open numeric answer in pence
Varies by 118 service
Standard cost of call to the number requested
Cost of local call
Cost of national call
Other
Don't know

ASK ALL USE DQ SERVICES AT Q4 OR Q5

Q34. SHOWCARD How likely, if at all, would you be, to use information comparing the costs of the various 118 directory enquiry services? SINGLE CODE

Certain to
Very likely
Fairly likely
Fairly unlikely
Very unlikely
Certain not to
Don't know

ASK ALL CERTAIN/ LIKELY TO USE INFORMATION [CODES 1-3 AT Q34]

Q35. And where would you like to see this information available? MULTICODE, DO NOT READ OUT

Internet generally
Ofcom/ICSTIS/Regulators website
Leaflet from Ofcom/ICSTIS/Regulator
Leaflet with phone bill
Leaflet (general)
Phone book
Other (specify)
Don't know

ASK ALL USE DQ SERVICES AT Q4 OR Q5

Q36. SHOWCARD I'm now going to read out some statements about the introduction of these new 118 directory enquiry numbers. Please tell me the extent to which you agree or disagree with each one?

READ OUT STATEMENTS. ROTATE. SINGLE CODE FOR EACH.

Strongly agree
Tend to agree
Neither agree nor disagree
Tend to disagree
Strongly disagree
Don't know

The extra services offered by some of the new directory enquiries providers are, or will be, really useful to me

I do/will only call one number for directory enquiries, so having a wide choice of numbers and 118 directory enquiry services is not important to me

Competition between the different directory enquiry services will lead to an improvement in the quality of the services they provide

I find the current level of choice in the 118 directory enquiry market confusing

Competition between the different directory enquiry services will lead to the costs of these services coming down