

Evaluation of Directory Enquiry Services

Ofcom/ICSTIS research



Published: 29 March 2006

Contents

Section		Page
Section 1	Executive summary	1
Section 2	Background	3
Section 3	Perceptions and use of telephone DQ services	6
	DQ provider awareness and recognition	6
	Current use and change in usage patterns	7
	Self reported use of 118 services	10
	Fixed-line calls to national DQ services	11
	Mobile calls to national DQ services	11
	Satisfaction with DQ providers	11
	Influences on DQ service selection	12
	Consumer opinion on DQ liberalisation	13
	Awareness of additional DQ services	14
	Use of additional DQ services	14
	Consumer requirement for information to compare the DQ services	16
	Awareness of refunds in the event of being given incorrect information	16
Section 4	Performance of telephone DQ services	17
	Accuracy of telephone DQ services	17
	Changes in individual service accuracy levels between November 2004 and November 2004	18
	Comparison of accuracy between DQ services	19
	Comparison of accuracy of business and residential requests between DQ services	22
	Availability and performance of text-back service	25
	Availability of call connect service and provision of cost information	26
Section 5	Cost comparison of telephone DQ services	29
	Confusion over cost of calling 118 numbers	29
	Calculating costs for calling 118 numbers	31
	Length of calls – average length is 45 seconds for a single number	31
	Cost of calls – average cost is 54p for a single number	31
	Cost of calls from a fixed-line	31
	Cost of calls from a mobile	34
	Average costs on mobile and fixed line networks	36
	Costs and accuracy	37
Section 6	Methodology	43
Annex A	Consumer attitudes questionnaire	49

Executive Summary

Significant improvement in general accuracy levels across the DQ market with 95% of calls to 118 services resulting in the exact number or an acceptable alternative being given, and 90% being given the exact number

- The level of 'general accuracy'¹ has increased to 95% in November 2005 from 91% in November 2004, with a range across DQ providers from 87% to 96%.
- 'Specific accuracy'² at 90% remains statistically unchanged from previous reports, although for residential requests it has improved from 83% in April and November 2004 to 88% in November 2005.
- In 4% of calls to DQ providers no number was given despite the information being available to the provider.
- In only 1% of calls was the number offered neither the exact number nor an acceptable alternative.

Spontaneous awareness of a real 118 number is around one in two. Awareness, and reported use, is highest for 118 118 and 118 500

- Around half of UK adults can spontaneously recollect a genuine "118" number, confirming the fall from 60% to 53% between April and November 2004. Upon prompting this rises to two in three.
- Spontaneous awareness among DQ users is 80%.
- There is also a fall in reported use; with fewer than half of UK adults saying they now use DQ services (with almost two-thirds calling mainly from fixed-lines). Perceived increases in costs are cited as the main reason for lower use of DQ services.
- 118 118 The Number and 118 500 BT are the most frequently used services, reported by consumers³ as being called by 42% and 26% of DQ users respectively. The next most popular 118 number is reported as being called by 6%. Both fixed-line and mobile customers say they choose a service because they know about it primarily through advertising or the ease of remembering the number.

Levels of satisfaction with 118 services are generally high and have improved since 2004. On balance 192 is still thought to have been better and consumers continue to say that increased choice is 'not that important'

- Satisfaction with DQ providers is up six points to 54% since November 2004 and those who have chosen a particular provider are more satisfied than those who have not.

¹ 'general accuracy' – 'a request results in the correct number being given and in the case of business requests the number reaches the requested business but *not necessarily* the requested department'

² 'specific accuracy' – 'a request results in the correct number and in the case of business requests the number reaches the requested department'

³ Reported usage does not necessarily reflect market share. The awareness survey did not cover businesses, and among consumers users of different DQ services may have different usage patterns.

- Although 192 is still perceived to be better, there is a warming towards 118 with most now saying 118 services are as good as, or better than, 192 with those considering it to be worse having fallen to fewer than one in three.
- Most DQ users only use one provider and therefore feel that having a choice is not important. Over two-thirds of consumers say that the level of choice is confusing.
- Just under half feel that competition will have benefits in reduced cost and improved service.
- The number of complaints to Ofcom about DQ services has now fallen to its lowest level since liberalisation, and is lower than the number of complaints to Oftel before liberalisation.

Awareness of additional services offered by 118 providers is increasing

- Consumers may not be making the most of the potential of the services offered by DQ providers as knowledge of the additional services is not comprehensive.
- Text-back service has notably improved both in terms of its stated availability and the delivery of text messages. Call Connect is correctly mentioned in the majority of cases though call handlers are still not always stating the onward call charges.
- Half of adults are aware of any of the additional options (up from November 2004) and awareness is highest for call connect and text-back (just over a quarter for each).
- Lack of knowledge about costs may also play a role in limiting use of services as only one in ten DQ service users who have a mobile are aware that the text-back service is free.

Call costs vary widely across providers and networks, with calls from mobiles more expensive than from fixed lines

- The average call cost from a BT fixed line phone is 54p, up 4p from November 2004.
- By comparison, the legacy 192 service cost 40p from a BT phone when it was discontinued in August 2003.
- Calls from a BT fixed line to 13 of the 30 services tested cost 40p (the cost of BT's old 192 service when it ceased in August 2003) or less.
- The average call duration to obtain a single number is 45 seconds. Calls requesting a residential number are on average four seconds longer than those for a business number.
- There is a range of different pricing structures. These vary widely and depend on which network is used and which DQ provider is called.
- The lowest costs tend to be those which are charged at a flat fee rather than on the basis of call duration.
- There is little correlation between accuracy and cost.
- In November 2004 the range of costs was 27p to 65p. Costs for all but one of the services now range from 29p to 66p. 118 866 Ring True has raised its initial charge to £1.50, and an average call now costs £1.71.
- Calls to DQ providers from mobiles are generally more expensive than those from fixed lines. Of the mobile network providers "3" is generally the cheapest and Orange the most expensive.

- The least expensive call to a mobile is to 118 888 Conduit (40p) on Virgin Mobile, and the most expensive is 118 499 Share Charity (£2) on the Orange network.

Call costs are not well known, although information comparing costs between 118 providers does not seem to be important to the majority of consumers

- Given the wide variation costs and how costs are calculated it is perhaps not surprising that call costs are not well understood by consumers. Many are neither able to say what their chosen provider charges for a single call nor where they would go for trusted information.
- On the whole, 118 services are perceived to be more expensive than 192 although the perception remains that 192 services were cheaper than was actually the case.
- The majority of DQ users are unlikely to use information comparing DQ costs, and almost half do not know where they could find trusted information about 118 services.

Section 2

Background

- 2.1. The DQ market was liberalised in December 2002, when services on the new 118 XXX numbers began operating in parallel with the legacy 192 and 153 numbers. The legacy services ceased operating six months later. During that time, there has been a significant level of attention and interest in the efforts of liberalisation from the media, consumer groups and the public.
- 2.2. One of Ofcom's objectives in its 2005/06 Annual Plan was to continue to monitor and assess the provision 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 further similar research. This would allow a comparison of performance levels and the ability to measure trends on a like-for-like basis. There have now been four surveys of the DQ market, with the mystery shopping exercises in the three most recent surveys having been commissioned by Ofcom and conducted using comparable 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*⁴, covered the results of both a mystery shopping exercise and a consumer awareness survey. Overall, it found that 62% of DQ requests were responded to accurately by the 30 DQ providers monitored. This research was carried out shortly after full liberalisation (i.e. once the legacy services had ceased) and the methodology used during this initial survey was not comparable to subsequent surveys.

Mystery shopping exercise and consumer research, April 2004

- 2.4. Early in 2004 Ofcom and ICSTIS conducted a more in-depth study of the market. 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 report⁵ showed that across the market, 87% of requests to DQ providers resulted in accurate information. The methodology took into account the "real

⁴ <http://www.ofcom.org.uk/static/archive/oftel/publications/consumer/2003/dqresearch1103.pdf>

⁵ http://www.ofcom.org.uk/research/consumer_audience_research/telecoms/dq_report

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 durations of requests, and estimated market shares based on information supplied by DQ providers. The methodology section contains further details of weighting.

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 elements 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 MORI⁶
- 2.6. The October/November 2004 mystery shopping exercise included a survey of the accuracy of text-back, and the provision of onward call cost information for those providers which offered to text the telephone number to a mobile or to connect the caller to the telephone number.
- 2.7. The methodology of the mystery shopping research was the same as that used in April 2004, thus allowing the accuracy of providers to be directly compared. A separate survey which examined residential consumers’ usage and attitudes to DQ services was also conducted.

Mystery shopping exercise and consumer research, August 2005

- 2.8. This latest 2005 research is also a joint venture between Ofcom and ICSTIS and comprises both mystery shopping, assessing the quality and delivery of DQ services and suppliers, and residential consumers’ use of, and attitudes towards, DQ services. Both were conducted by MORI⁷.
- 2.9. The scope of the mystery shopping exercise continues to include an evaluation of the accuracy of text-back and the provision of charging information from call connect services for those providers which offered these services.
- 2.10. The methodology of the mystery shopping research is comparable, though not identical, to that employed in April 2004 and November 2004. The changes were made to improve the robustness of the survey.

⁶ <http://www.ofcom.org.uk/research/telecoms/reports/numresearch/dq/eval.pdf>

⁷ See methodology section for further details on both the mystery shopping exercise and the consumer study

2.11. The core differences in the methodology are:

- Different telephone numbers were requested (the same requests were used between April 2004 and November 2004 studies)
- More numbers were requested: whereas previously each request was made four times on average, this time each request was made only once
- The number of business number requests made to each provider was doubled in comparison with the previous research
- The calls were spread over a longer time period
- More originating lines, including fixed-lines and mobiles, were used to make the mystery shopping calls

All of the changes were made due to changes in the DQ market and learning from previous research.

Complaints about DQ services

2.12. Prior to and during the liberalisation process Oftel, and now Ofcom, have been monitoring the level of complaints about DQ services. During 2002, before liberalisation, Oftel's Consumer Representation Section (CRS) received, on average, about seven complaints per week about any aspect of DQ services. During the eight weeks following full liberalisation on 24 August 2003, the number of complaints was on average over 200 per week, with over 300 received in the first week. The rate of complaints has fallen substantially since then, and during 2005 the average number of complaints to the Ofcom Contact Centre (OCC) about DQ services has been just over five per week. Given that the OCC receives significantly more complaints about telecoms matter than CRS received, the fall in the number of complaints on a real terms basis has been even greater.

2.13. 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

Section 3

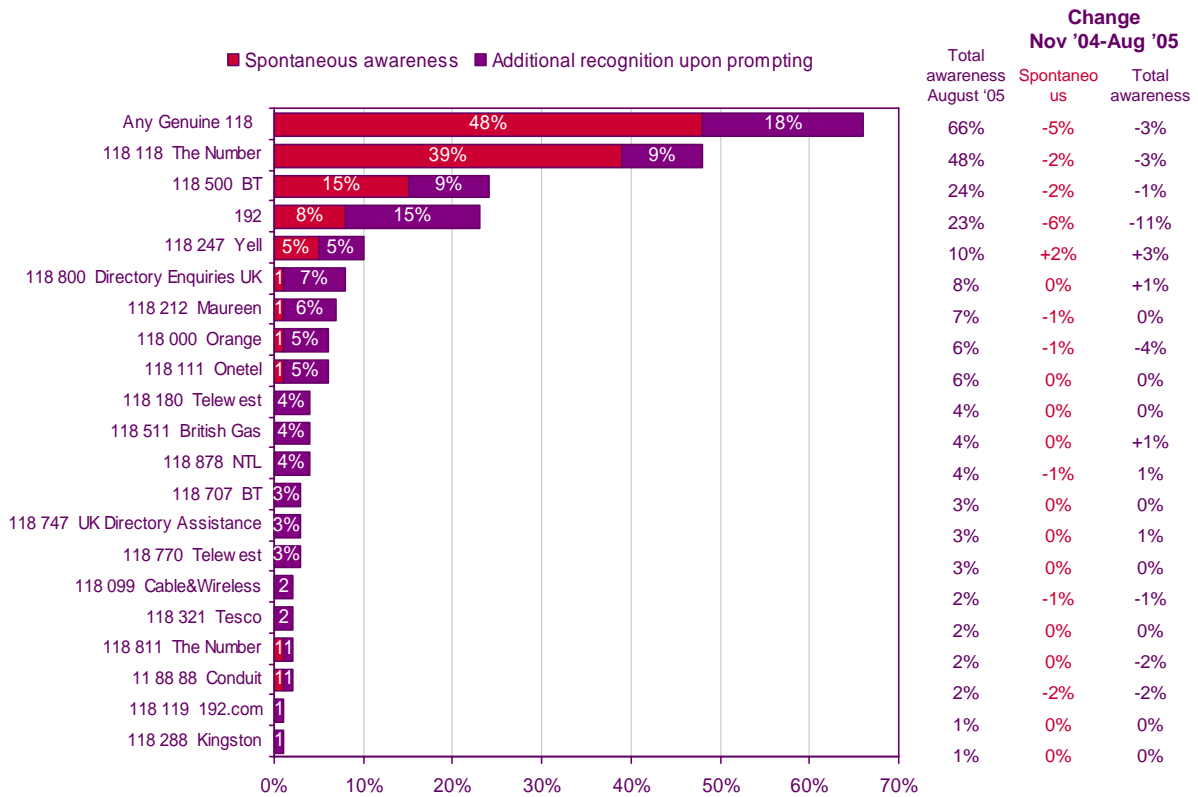
Perceptions and use of telephone DQ services

DQ provider awareness and recognition

- 3.1 Around half (48%) of UK adults can spontaneously recollect a genuine “118” number. This represents a statistically significant decline from 53% in November 2004 (see figure 1). Spontaneous awareness remains higher amongst users of DQ services than non-users at 80% (75% in April 2004 and 82% in November 2004).
- 3.2 118 118 The Number has the highest level of spontaneous awareness (39%) amongst UK adults followed by BT’s 118 500 (15%) and 118 247 Yell (5%). None of the other providers measure more than 1% for spontaneous awareness. The old 192 number is still spontaneously mentioned by one in twelve (8%), although awareness for this number is in decline. Generally, there has been little change in levels of spontaneous awareness levels since November 2004.
- 3.3 Total awareness of a genuine DQ number currently stands at 66% which is broadly similar to that reported in November 2004 (69%). Most 118 providers have seen some fall in total awareness but this remains highest for 118 118 The Number (48%). BT’s 118 500 DQ service follows in second place (24%). There has been no significant change in these levels since November 2004 (51% and 25% respectively). 192 is mentioned by almost a quarter (23%) although this is significantly less than in November (34%).
- 3.4 Total awareness of numbers other than 118 118 and 118 500 is significantly lower. Five providers achieved awareness greater than 5%:
- 118 247 Yell (10%)
 - 118 800 Directory Enquiries UK (8%)
 - 118 212 Maureen (7%)
 - 118 111 Onetel (6%)
 - 118 000 Orange (6%).
- 3.5 No other DQ number was mentioned or recognised by more than 5%.
- 3.6 118 247 and 118 747 are the only services to have increased their level of overall awareness by a statistically significant margin (up from 7% to 10% and from 2% to 3% respectively). Recognition of other providers has fallen significantly: 118 000 Orange (down from 10% to 6%), 118 811 The Number and 118 888 Conduit (both down from 4% to 2%).

3.7 Total awareness (spontaneous and prompted) is less than 1% for many providers – results are summarised in figure 1.

Figure 1. Spontaneous and prompted awareness of DQ providers (Chart excludes mentions of less than 1%)



Base: All UK adults 15+ (2,095), August 2005, MORI survey

3.8 Television advertising remains the main way people say they find out about the DQ numbers, mentioned by 29% of all UK adults (up from a fifth in November 2004) and 44% of DQ users. The BT Phonebook (11%) and Yellow Pages (6%) are also key ways of finding out about the new services. This is consistent with the April 2004 Evaluation of Directory Enquiries services, shortly after the introduction of the new 118 DQ numbers.

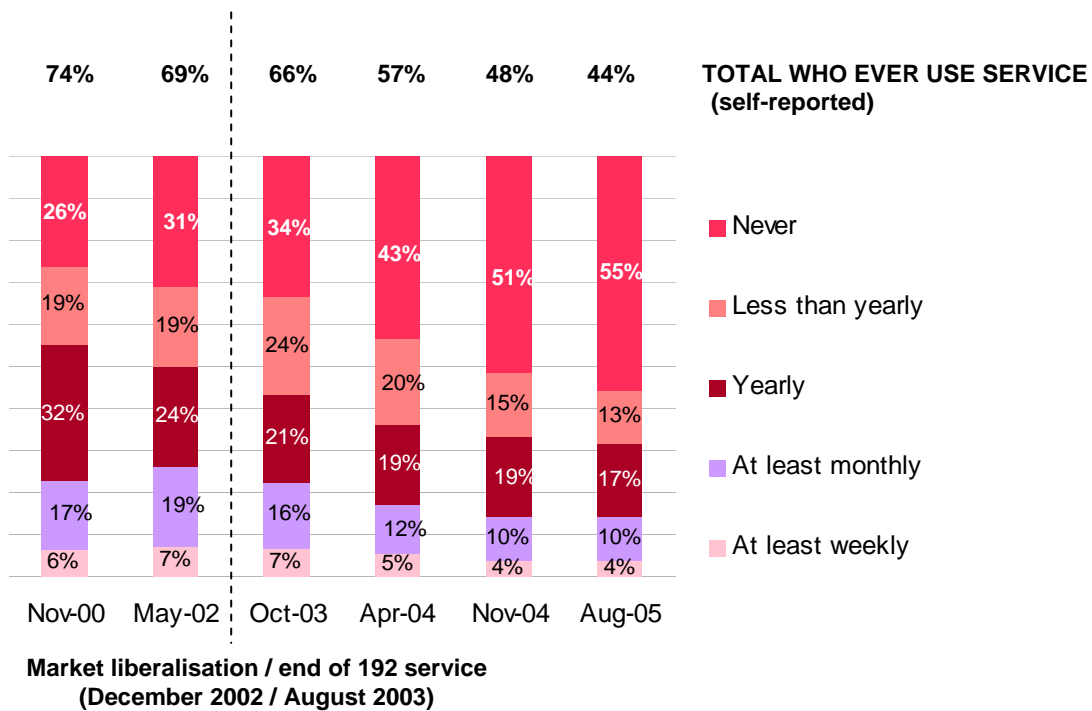
3.9 As in November 2004, the BT Phonebook (13%) and the internet (10%) are the most important sources people feel they will use in future to source information on the 118 DQ services, followed by TV advertising (8%) and the Yellow Pages (8%).

Current use and change in usage patterns

3.10 Self-reported⁸ use of telephone DQ services has continued to fall over time: under half (44%) of UK adults now say that they use national DQ services, see figure 2.

⁸ As stated these are self reported figures on usage and may not accurately reflect actual call volumes to 118 providers.

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



Base: All UK adults 15+, (2095), August 2005, MORI survey

- 3.11 Most of those adults who use national DQ services at all do so infrequently. Regular users (those calling a DQ provider at least monthly) account for 31% of DQ users, or 14% of all adults (similar to November 2004) and the proportion of regular users (those using DQ services at least monthly) has remained unchanged since November 2004.
- 3.12 Currently 18% of adults who use national DQ services at all are unable to say whether they call DQ services more from a fixed-line or from a mobile. Around two-thirds call primarily from a fixed-line phone - 63% (significantly less than 70% in November 2004) while 8% call mainly from their mobile (significantly less than 15% in November 2004). The remainder use both fixed-lines and mobiles (10%).

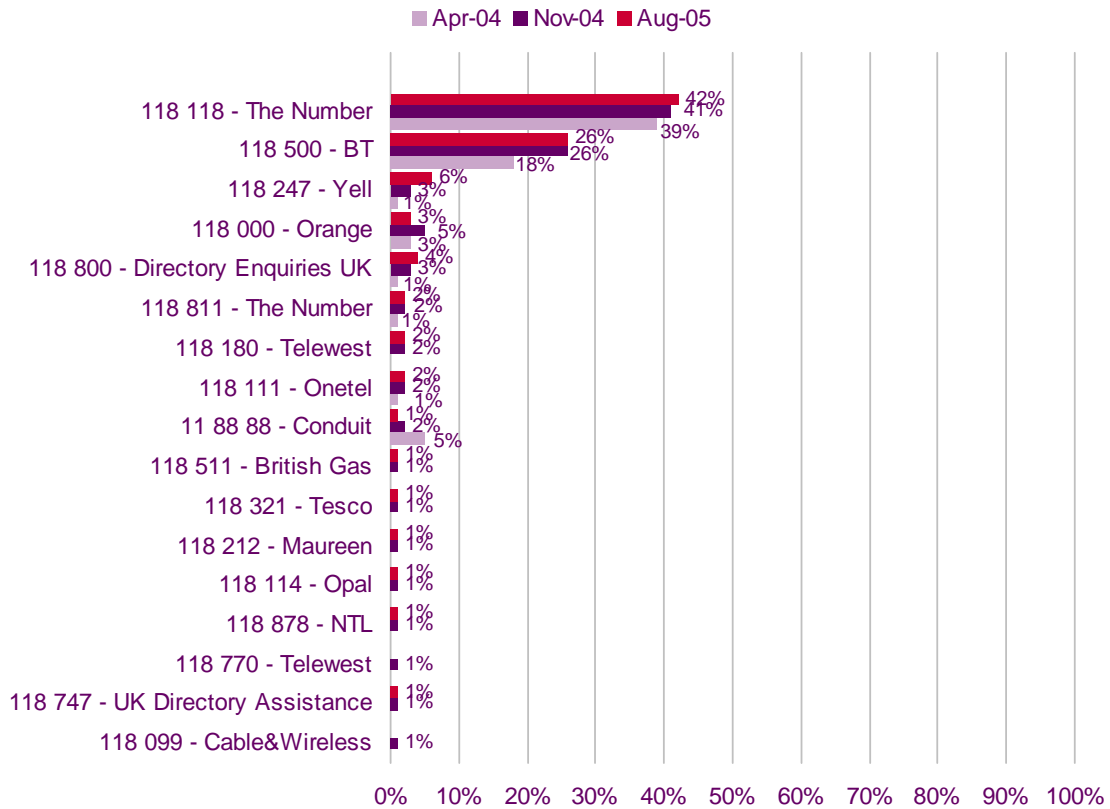
- 3.13 Over a third (36%) of UK adults say they are calling DQ services less frequently since the introduction of the 118 services, while almost half (47%) say their use of DQ services has remained steady. A minority (3%) say they are calling DQ providers more often. This is a similar pattern to that seen in November 2004. Under 25 year olds are less likely to use DQ services at all.
- 3.14 Perceptions around cost are again cited as the main reason for lower use of DQ services:
- 30% 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, and calls to 192 from a BT line used to cost 40p per call immediately before liberalisation).
- 3.15 Not needing to use the services (17%) was the next most frequently cited reason for calling directory enquires less frequently followed by not being able to remember the numbers (11%).
- 3.16 Over two-thirds of UK adults (70%) use the phonebook to look for telephone numbers instead of calling a DQ provider. Those who use DQ services, even those who use them frequently, are just as likely as all UK adults to use the phonebook to find numbers, indicating that DQ services are used in conjunction with other services rather than instead of them. Other alternatives include personal records (13% of UK adults), the internet/computer (12%), friends/colleagues/ relatives (8%), and specialist internet directories (8%), similar to November 2004.
- 3.17 The majority (88%) of people who use alternatives are satisfied with their main alternative method; 4% are dissatisfied⁹.
- 3.18 The 3% of UK adults who claim to use DQ services more frequently since liberalisation say this is largely because they know about the service (several mention advertising), or because they think it is a better service generally.

⁹ Where satisfaction is reported this is calculated by adding "very satisfied" and "fairly satisfied" responses and dissatisfaction is calculated by adding "very dissatisfied" and "fairly dissatisfied" responses

Self reported use of 118 services

3.19 Similar to awareness, The Number's 118 118 is the most commonly used (according to self-reports); 42% of consumers say they have called this service in the last 12 months (similar to November 2004). BT's 118 500 is the next most frequently mentioned number with a quarter (26%) of consumers saying they have called it (again, unchanged since November 2004) as illustrated in figure 3.

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



Base: 898 UK adults (15+) saying they use a national UK directory enquiry service, August 2005, MORI survey – consumers may have called more than one 118 number

Fixed-line calls to national DQ services (63% of users call mainly from a fixed-line)

- 3.20 More consumers say they call 118 118 The Number and BT's 118 500 from a fixed-line telephone than any other DQ provider, mentioned by 35% and 24% respectively. Other DQ operators are used by fewer consumers, each gaining less than 5%.
- 3.21 47% of consumers have used only one DQ provider from a fixed-line in the last twelve months while 19% have used more than one from a fixed-line. Most of this latter group have subsequently selected a main provider to call. A third (34%) have not used DQ services from a fixed-line.

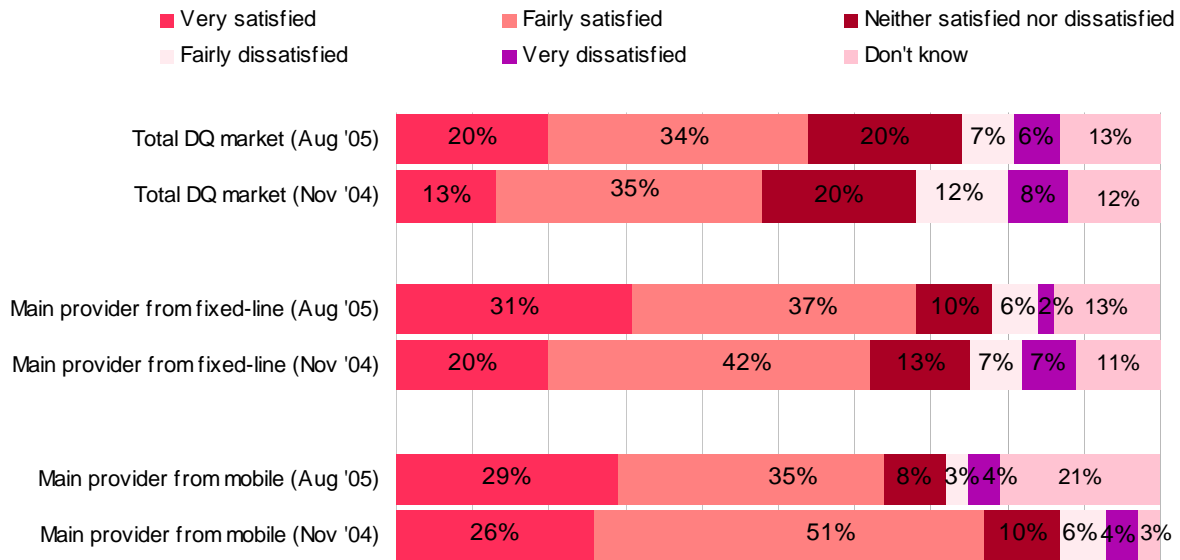
Mobile calls to national DQ services (8% of users call mainly from a mobile)

- 3.22 Of those calling 118 services from a mobile in the last 12 months, The Number's 118 118 is mentioned by more than one in ten (12%) and BT's 118 500 is mentioned by 5%. All other numbers were mentioned by less than 5%. As with those consumers who mainly call DQ from fixed lines, most of those calling from a mobile have called only one provider (15% of all DQ users), or have called more than one but selected a main provider.

Satisfaction with DQ providers (satisfaction is up and dissatisfaction is down)

- 3.23 Satisfaction with DQ providers is up since November 2004 as shown in figure 4. It currently stands at 54% (up six points) and dissatisfaction at 13% (down six points).
- 3.24 Among the 63% of consumers calling from a fixed-line who have chosen to call a single provider 'most often', two-thirds (67%) are 'very' or 'fairly' satisfied (compared to 54% satisfied with the 118 providers overall). There are indications that satisfaction among these fixed-line consumers has improved since November 2004 (62%). However, this change is not statistically significant. Levels of dissatisfaction remain low in comparison.
- 3.25 While satisfaction levels are comparable between fixed line callers and those who have selected a single provider to call from a mobile they have dropped significantly amongst mobile users in the last year, see figure 4. However, this fall in satisfaction is driven by an increase in those stating 'don't know' as opposed to consumers being actively dissatisfied.

Figure 4. Change in overall satisfaction with DQ services, compared to satisfaction with ‘main providers’ amongst fixed and mobile DQ customers



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, August 2005, MORI survey

3.26 Sample sizes are large enough to make comparisons between satisfaction levels of the two largest DQ services amongst consumers that call these services from fixed lines. Those who have chosen BT’s 118 500 as their main DQ provider from a fixed line are more satisfied (83%) than those who have chosen 118 118 (The Number) (65%). Satisfaction with 118 500 has also increased since November 2004.

Figure 5. Satisfaction with user’s main DQ provider from fixed line

DQ No.	August 2005		November 2004	
	Very/ fairly satisfied with main provider	Very/ fairly dissatisfied with main provider	Very/ fairly satisfied with main provider	Very/ fairly dissatisfied with main provider
Overall	68%	9%	62%	14%
118 500 – BT	83%	7%	73%	11%
118 118 – The Number	65%	12%	62%	18%

Base: All UK adults (15+) using each provider from fixed-line: Overall: (518), 118 500: (189), 118 118 (261)

Influences on DQ service selection

3.27 For both fixed-line and mobile customers, the influences on service selection are similar: advertising recall (24% overall), ease of remembering the number (22%), perceiving (in some cases correctly) that the number was the new BT service (18%), or that it is the only service customers can recall (11%). This is broadly consistent with the rationale in November 2004. Aspects of the quality of the service in terms of being

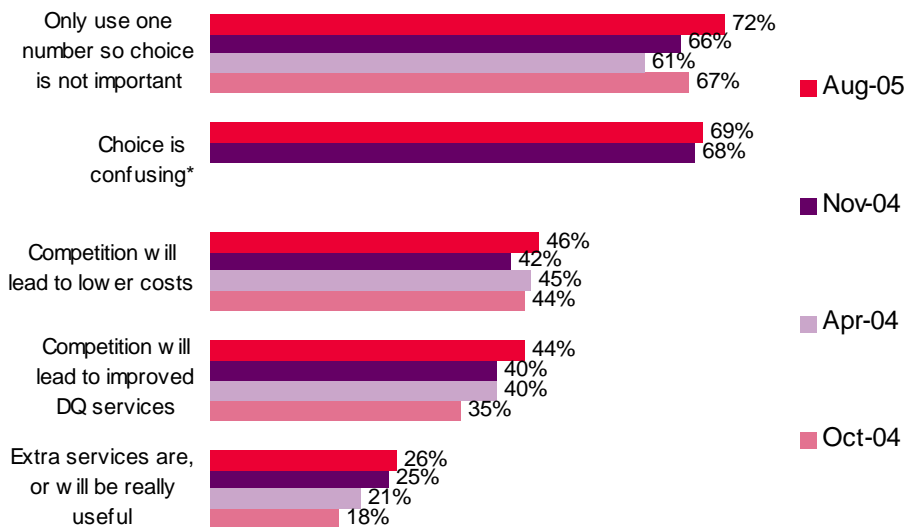
“best” (4%), or “cheap” (6%) appear less important in consumers' service selection. Accuracy is not mentioned in August 2005 although more consumers mention cost as a factor than in November 2004.

Consumer opinion on DQ liberalisation

3.28 On balance 192 is still thought of more highly in terms of quality of service than 118 among users of national DQ services. However there is a warming towards 118 since November 2004 with more users now saying the service is better (up four points to 12%), the same number saying there is no change (four in ten) while those saying 118 is worse is down 10 points to 32%.

3.29 Consumers were given a range of statements about the future of DQ services and asked to what extent they agreed or disagreed with each. The results, summarised in figure 6, illustrate that among consumers the perception remains that they will not benefit from the range of DQ providers (they use only one) – stated by 72% (compared to 66% in November 2004). This is consistent with the proportion of DQ users who have actually selected a main supplier (generally 118 118 or 118 500). Furthermore, over two-thirds (69%) feel the choice of many different providers is confusing. However, fewer than half (44%) say competition will lead to an improvement in service quality and 46% expected that call charges will be driven down. (In fact, the weighted average cost of one request across the market is higher now than with 192.) A quarter (26%) agree that the “extra services on offer will be really useful”.

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



* not asked prior to November 2004

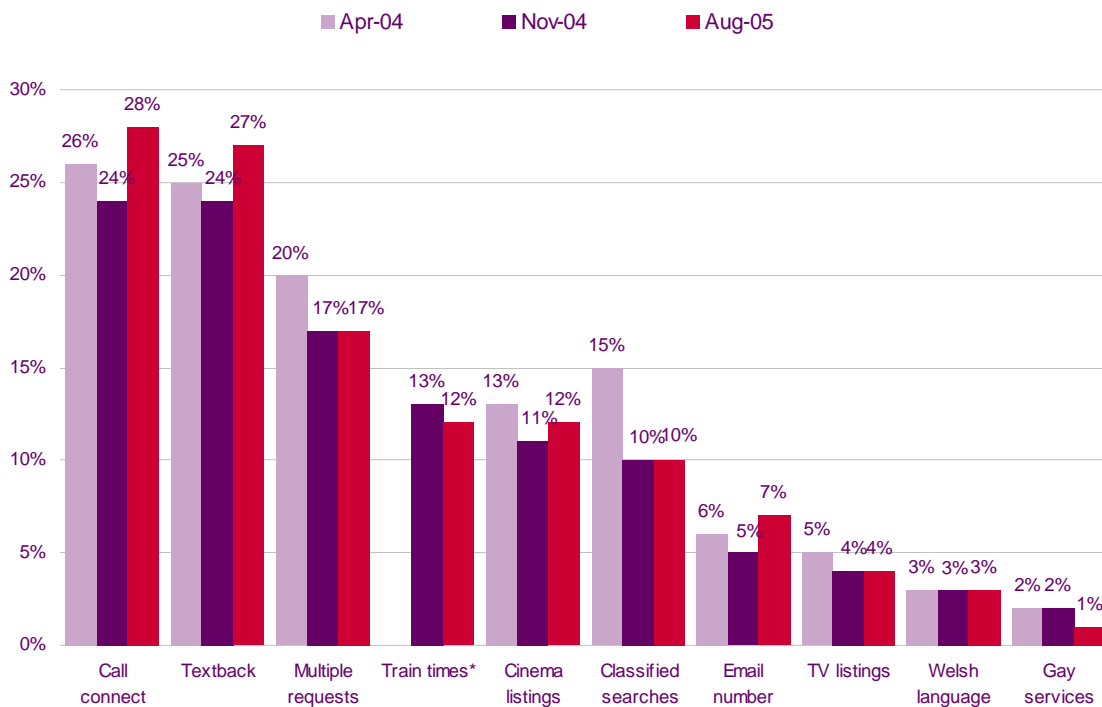
Base: 677 UK adults (15+) using any 118 national DQ services, August 2005, MORI survey. Results are calculated by adding “agree strongly” and “tend to agree” responses

Awareness of additional DQ services (half are aware of them, half are not)

3.30 Half (47%) of UK adults are aware of DQ providers offering additional services, sustaining the rise reported in November 2004 (up from 41% in April 2004). The main additional services consumers remain aware of are call connect (28%) and text-back (27%). Both were mentioned by 24% in November 2004 as shown in figure 7.

3.31 Awareness of other services available from DQ providers remains low in comparison. Only around one in ten are aware that cinema listings (12%), train times (12%) and classified searches (10%) are available. Other services (for example TV listings and specialist gay services) are even less well known amongst the UK population.

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



*Not available during April 2004 fieldwork

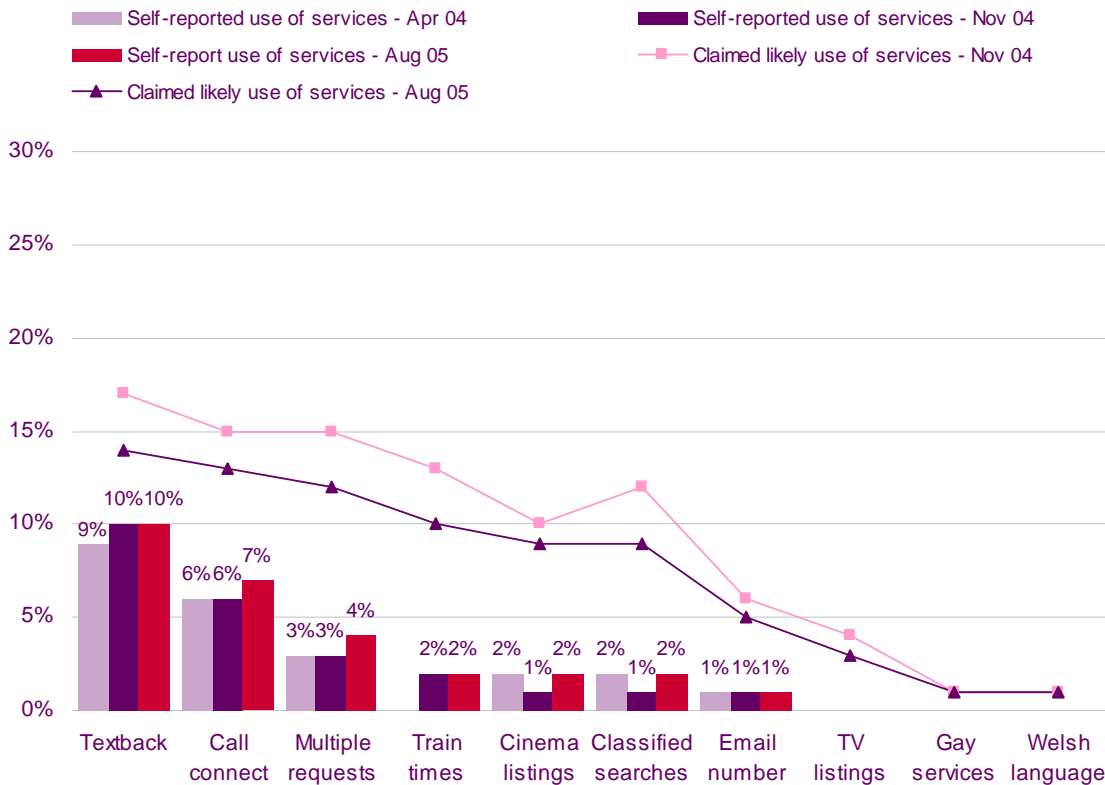
Base: All (2,095 UK adults 15+), August 2005, MORI survey

Use of additional DQ services

3.32 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 they do currently, as shown in figure 8 although some of this may be related to over-claimed future use. Claimed potential future use remains stable.

3.33 One in six UK adults say they have used at least one of the additional services offered by DQ providers (16%). One in ten has used text-back (10% amongst UK adults, 12% amongst mobile users). Call connect is the second most popular, used by 7% - consistent with reported usage in April and November 2004. Other services have been used by smaller numbers of consumers.

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



Base: All (2,095 UK adults 15+), August 2005, MORI survey

3.34 Nine in ten DQ users who have a mobile are unaware that the text-back service is free. Half simply stated they did not know (48%) including two-fifths (39%) of those who have called a DQ service from their mobile. Of those giving an estimate the average for text-back is 42p, up from an estimated 35p in November 2004.

3.35 For those using the call connect service, a third (33%) do not feel able to give an estimate of the charges per minute after connection (unchanged from November 2004). This is despite the fact that the ICSTIS Code of Practice requires DQ providers to inform the caller of the charges for call connection. Of those consumers who were able to estimate the cost of the onward call, an average of 29 pence per minute was given (similar to the average estimate in November 2004). Onward calls are charged at the same per minute charge as the call to the DQ provider and so costs vary across providers and networks in the same way as costs vary for the initial call (see Section 5 for details of call charges across providers).

3.36 Those who use call connect from a mobile (correctly) estimate higher onward call charges. The average estimate is 46 pence (unchanged from November 2004). As with fixed-line users, a substantial number (40%) don't feel able to estimate onward call costs.

Consumer requirement for information to compare the DQ services

3.37 A third (32%) of DQ users say they would use information to compare the costs of various 118 providers if it were available; six in ten (60%) say they are unlikely to. Potential use of information to compare costs between providers was highest amongst younger DQ users aged 15-34, single people and people who call DQ providers mainly from a mobile.

3.38 Family members (17%) and the internet (17%) would be the most trusted sources of information on the costs of 118 services. The regulator would be the trusted source for 2%, while 44% don't know to whom they would turn.

Awareness of refunds in the event of being given incorrect information

3.39 A minority of DQ users are aware that they are eligible for a refund if the DQ operator fails to supply an available number (14%). Four in ten say they are unlikely to try to get a refund (41%), while a similar proportion say they would be 'likely' or 'certain to' (38%). A small number (2%) have requested a refund.

Section 4

Performance of telephone DQ services

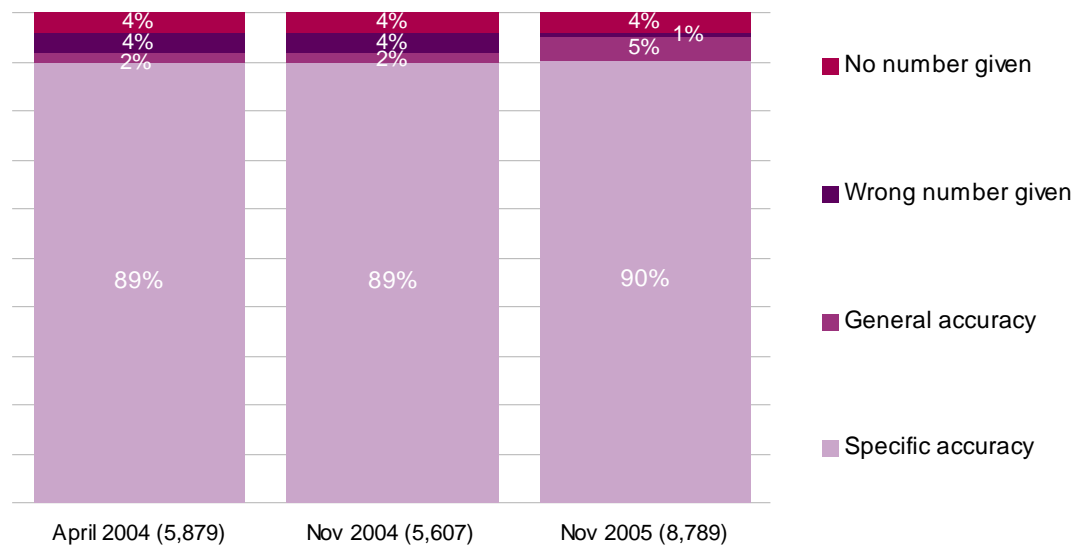
Accuracy of telephone DQ services

- 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 customers¹⁰. 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 businesses 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 to enable businesses to keep a closer track of the calls they receive, or to process calls more efficiently.
- 4.3 Ofcom has taken this into account in its analysis of the overall accuracy of the market and the accuracy of business requests, and has defined positive outcomes in two ways:
- **‘specific accuracy’** – ‘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 being given and in the case of business requests the number reaches the requested business but *not necessarily* the requested department’. For a number to be defined as ‘general accuracy’ the telephone number given by the DQ operator must enable the caller to be transferred to the requested department *within the same call*.
- 4.4 In order to provide a direct comparison between waves, data from April and November 2004 and November 2005 have been analysed using both definitions of accuracy.
- 4.5 As illustrated in figure 9 the overall specific accuracy of the market remains unchanged at 90% (which is not statistically different from the score of 89% in April and November 2004).
- 4.6 ‘General’ accuracy is currently 95%, a statistically significant increase on the two previous measures (91% in November 2004 and 92% in April 2004). In November 2005 a number which was neither the exact number sought nor an acceptable alternative was given on 1% of occasions. No number was given in the remainder of calls (4%).¹¹

¹⁰ For more details see Section 6: Methodology

¹¹ The data collected is weighted to reflect the real-world profile of calls to DQ services. Two weights are used when looking at overall market accuracy: confidential market shares of the providers, and proportion of requests for business and residential

Figure 9. Breakdown of call outcomes: specific accuracy unchanged since April 2004; general accuracy up slightly since previous waves



Base: All standard calls (c300 to each provider) November 2005, and (c200 to each provider) April 2004, November 2004, MORI survey

4.7 'Specific accuracy' of business requests (90% accurate) remains slightly higher than for residential requests (88%) in November 2005. Accuracy on residential requests has improved (up from 83% in both November 2004 and April 2004). Accuracy on business requests is unchanged.

4.8 Within the confines of the technique used to measure the accuracy of service provision in the market, there is an improvement since April 2004 in residential requests and when considering 'general accuracy' overall. There is no change in 'specific accuracy'.

Changes in individual service accuracy levels between November 2004 and November 2005

4.9 Of the 30 DQ numbers assessed in the mystery shopping exercise¹²:

- One DQ service has statistically significantly improved its 'specific accuracy': 118 770 Telewest (up 8 points).
- The majority of services (24) remain broadly stable.
- Five services have worsened since November 2004:
 - 118 888 Conduit (Welsh) (-15 points);
 - 118 404 BT (Welsh) (-14 points);

numbers. These weights are only applied to the overall market and not for comparison between individual providers. In the last Evaluation of Directory Enquiry Services, published in March 2005, data were weighted by another factor (the time each call took). This weight is not used in this wave, and previous waves' data have been amended so we make a 'true' comparison between waves. For this reason, percentages published in this report may differ from those published previously. See Methodology section for more details.

¹² C300 calls to each provider (c200 business requests, c100 residential requests) made in August-November 2005 and compared to calls made in November 2004 and April 2004. 'Specific 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 (85% and 15% respectively).

- 118 453 GAY-LO Directories 453 (-10 points);
 - 118 355 Ring True (-9 points); and
 - 118 800 Directory Enquiries UK (-8 points).
- These changes in specific accuracy are statistically significant at the 99% level.

Comparison of accuracy between DQ services

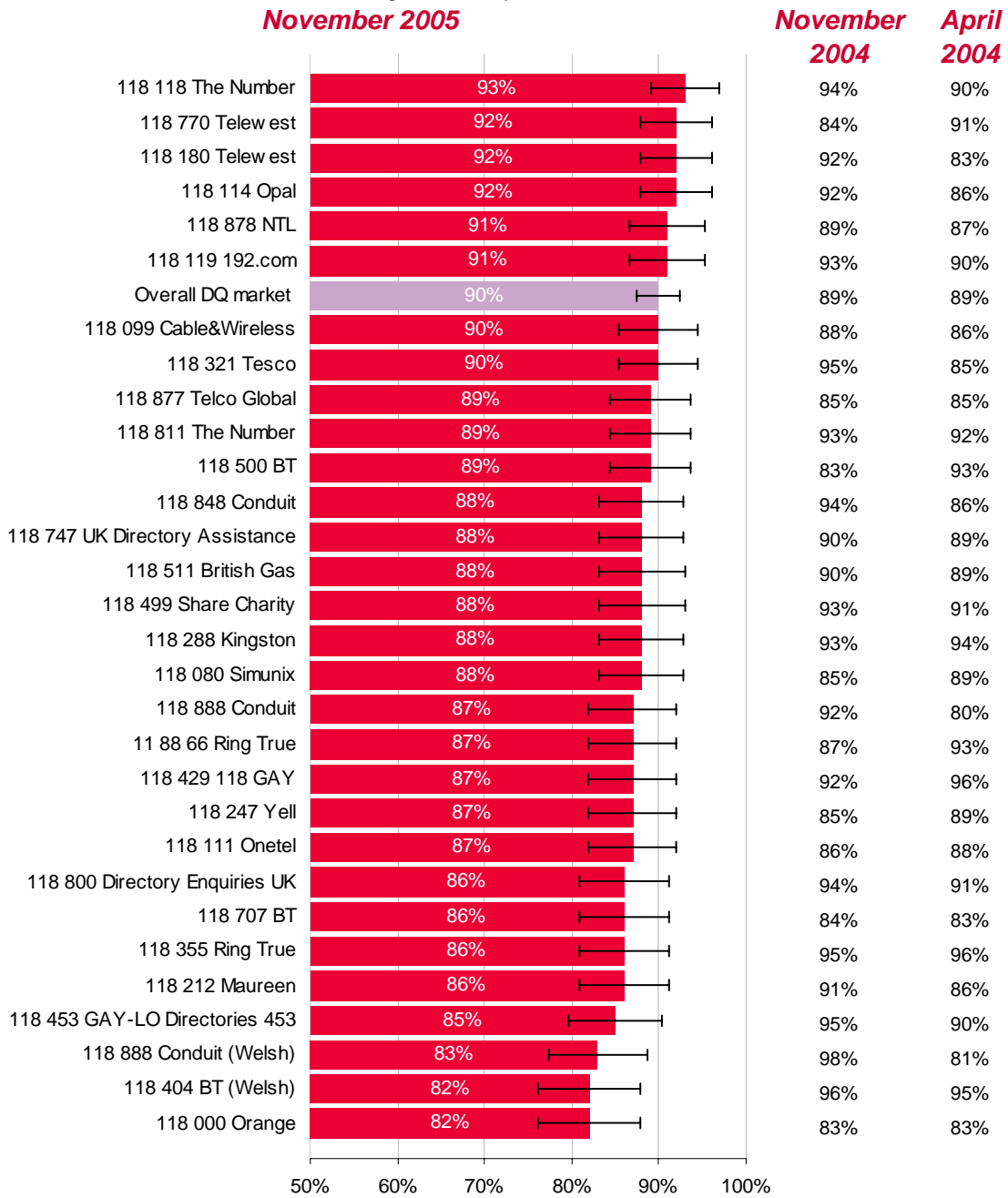
4.10 118 118 The Number, the two Telewest services 118 180 and 118 770, and 118 114 Opal were the most accurate ('specific accuracy') of the 30 providers measured, illustrated in figure 10.

4.11 Four services have performed significantly below the overall DQ market average on 'specific accuracy':

- 118 000 Orange;
- 118 404 BT (Welsh);
- 118 888 Conduit (Welsh);and
- 118 453 GAY-LO Directories 453.

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

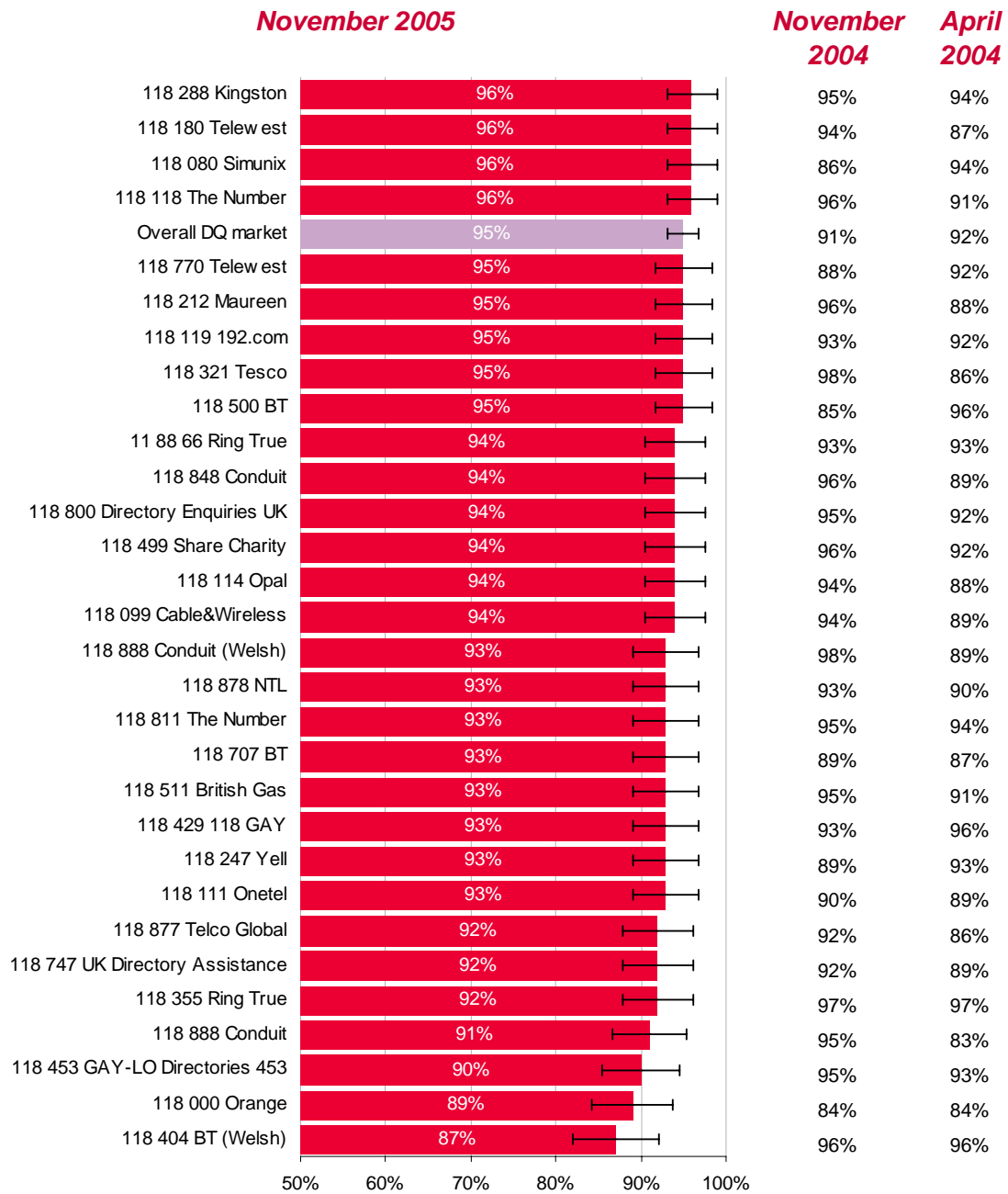
Error bars indicated on the chart below show range of accuracy at 99% confidence interval



Base: All standard calls (c300 to each provider), November 2005, MORI survey

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

Error bars indicated on the chart below show range of accuracy at 99% confidence interval

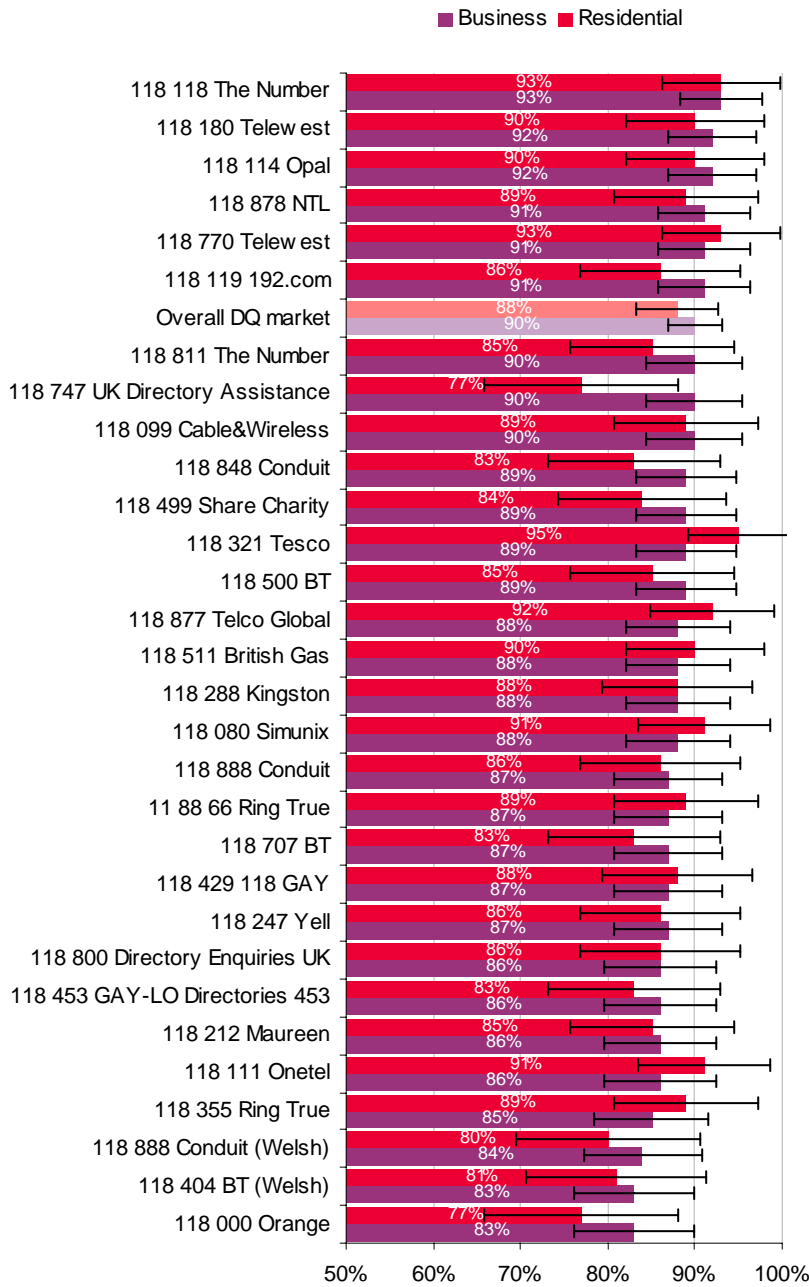


Base: All standard calls (c300 to each provider), November 2005, MORI survey

Comparison of accuracy of business and residential requests between DQ services

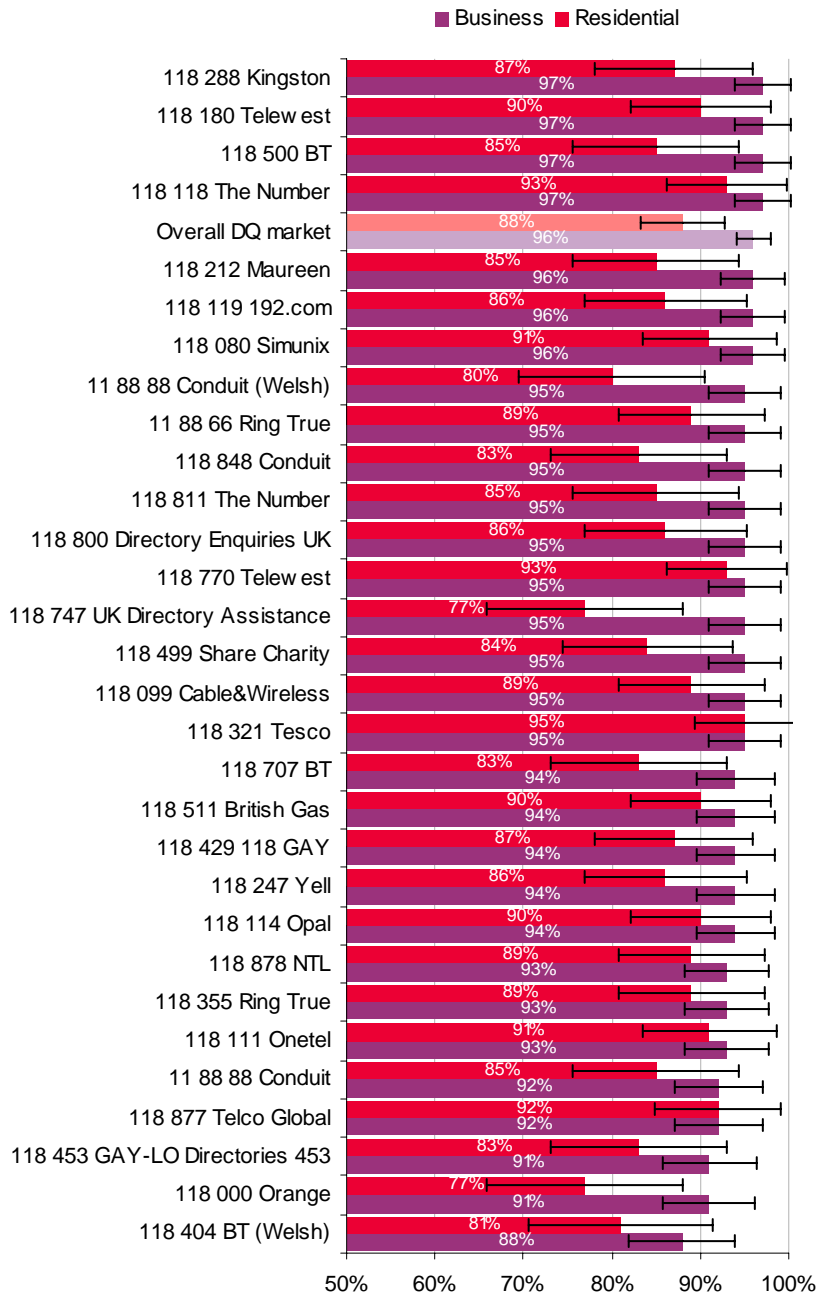
- 4.12 According to information obtained from the DQ industry, requests for business numbers account for 85% of calls to DQ providers.
- 9 of the 30 DQ services scored 90% or more for 'specific accuracy' in business requests.
 - The remainder (21 DQ services) all scored above 80% for 'specific accuracy'.
 - When applying the 'general accuracy' definition the number of providers with 90% or greater accuracy rises to 29. Only 118 404 BT (Welsh) is less accurate (88%).
- 4.13 As residential requests are not affected by the 'general accuracy' measurement, both accuracy figures are the same. For residential requests there is a wider spread of performance
- Nine providers measured 90% accuracy or more. The most accurate on residential calls was 118 321 Tesco (accurate in 95% of cases, although this is not significantly more than its nearest competitors).
 - Two providers were less than 80% accurate on residential calls: 118 000 Orange and 118 747 UK Directory Assistance (both accurate in 77% of cases).

Figure 12. 'Specific accuracy' of DQ providers: Business versus residential requests
 Error bars indicated on the chart below show range of accuracy at 99% confidence interval



Base: All business and residential calls (c200 business and c100 residential calls to each provider), November 2005, MORI survey

Figure 13. 'General accuracy' of DQ providers: Business versus residential requests
 Error bars indicated on the chart below show range of accuracy at 99% confidence interval

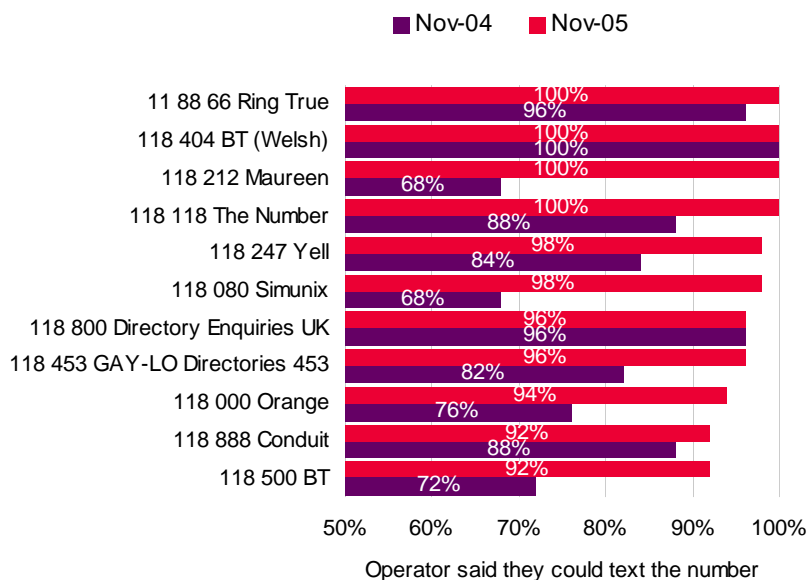


Base: All business and residential calls (c200 business and c100 residential calls to each provider), November 2005, MORI survey

Availability and performance of text-back service

- 4.14 Eleven of the selected DQ numbers currently provide the text-back service (as shown in figure 14). This service is free of charge. When a customer calls from a mobile the requested number is sometimes sent automatically even if the caller has not asked for it to be texted.
- 4.15 However, text-back was not always available in practice. On some occasions call-handlers said they were not able to provide the service. This happened less often in the latest survey than it did in November 2004. Now text-back is available more than nine times in ten for all the eleven DQ providers who offer the service. Five of the eleven providers have shown statistically significant improvements (118 080 Simunix, 118 212 Maureen, 118 500 BT, 118 000 Orange, 118 118 The Number) in saying the service was available or that they could provide the service.

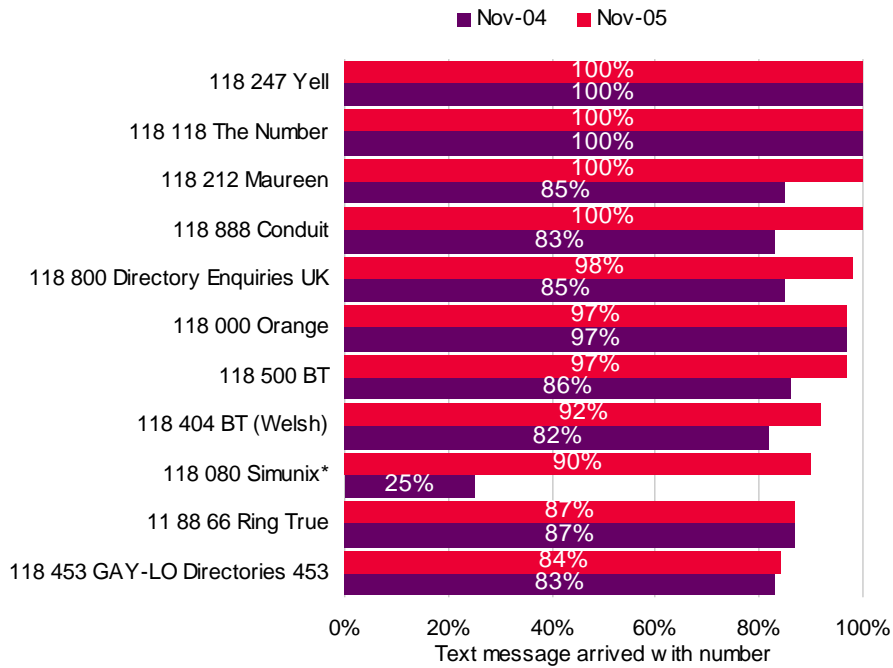
Figure 14. Call centre staff awareness of availability of text-back service



Base: All text-back calls (c50 to each provider), November 2005, MORI survey

- 4.16 In instances where text-back was stated as being available, most texts were received by the user. Four DQ services: 118 118 The Number, 118 212 Maureen, 118 888 Conduit and 118 247 Yell measured 100% delivery of text messages, as illustrated in figure 15. For all other providers there were instances where the number was not received by the caller's mobile. Two providers have significantly improved since November 2004: 118 888 Conduit, and 118 080 Simunix. 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).

Figure 15. Accuracy of text-back service



* In the November 2004 study, Simunix advised Ofcom they were experiencing technical difficulties

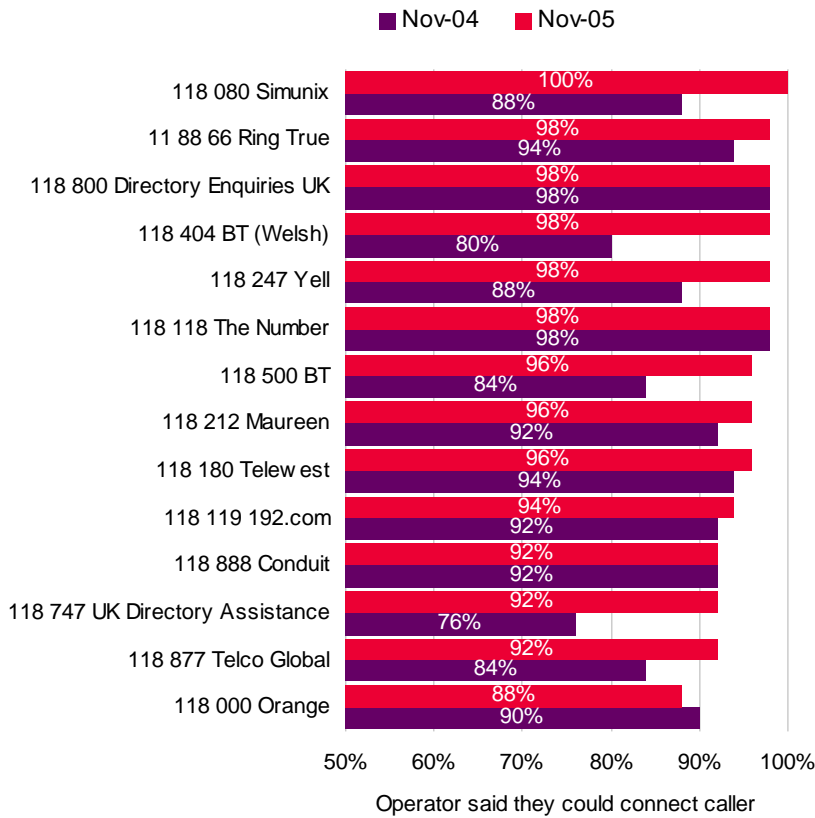
Base: All text-back calls where text-back is available and operator could supply number, November 2005, MORI survey

4.17 There could be numerous reasons for non-receipt of text-back messages and there is no way of assessing non-receipt. Reasons could include: 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

4.18 In November 2005, for one in twenty cases, call handlers said they were not able to connect the caller. This compared to one in ten cases in November 2004. 118 000 Orange call handlers said that call connect was not available on 12% of occasions, whereas 118 080 Simunix call handlers said the service was available in every case.

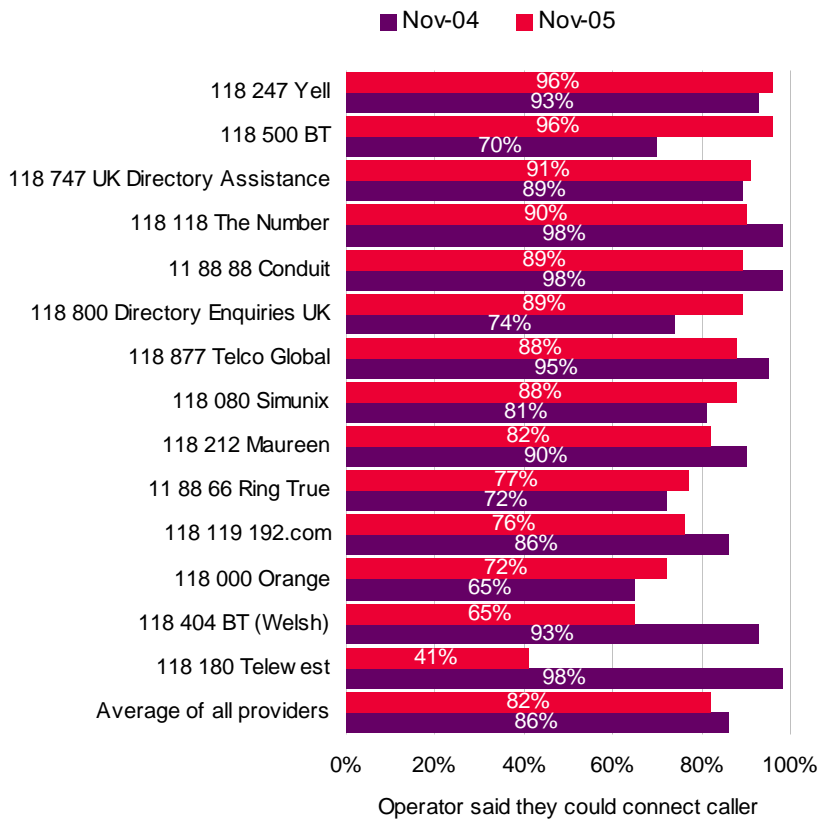
Figure 16. Call centre staff awareness of call connect availability



Base: All call connect calls (c50 to each provider), November 2005, MORI survey

4.19 Where offered, DQ providers are obliged to advise the caller of the cost of the onward connection. On average this occurred in over four in five cases. As shown in figure 17, five providers gave connection costs in fewer than four in five cases: 11 88 66 Ring True, 118 119 192.com, 118 000 Orange, 118 404 BT (Welsh), 118 180 Telewest. In fact 118 180 Telewest gave the cost in fewer than half of cases (significantly less than in November 2004).

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



Base: all where call connect was offered and the number requested was available: (630 overall, and c.40 per provider), November 2005, MORI survey

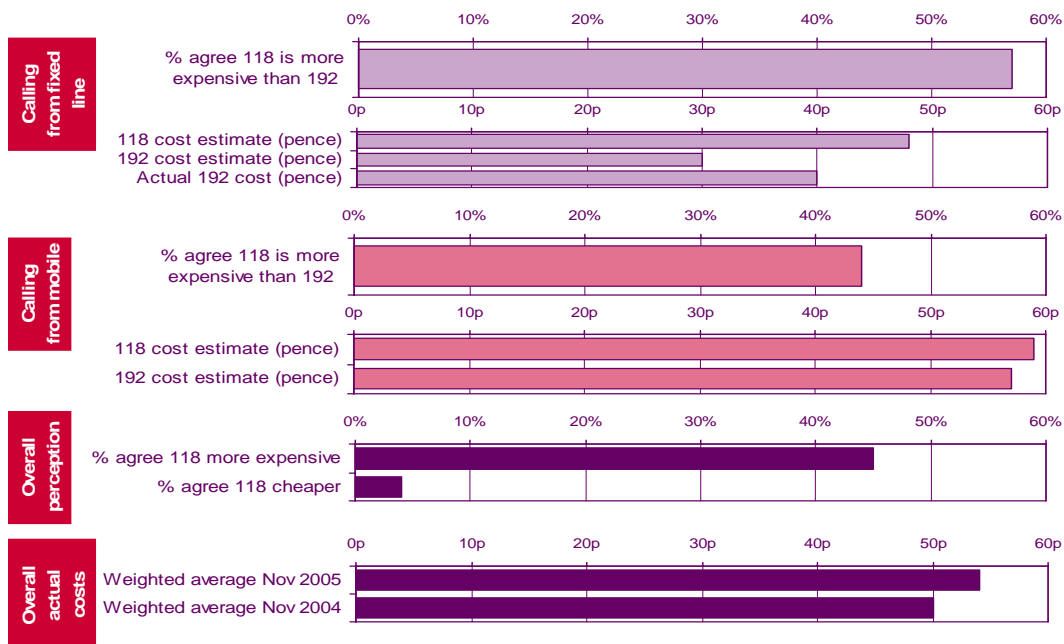
Section 5

Cost comparisons of telephone DQ services

Confusion over cost of calling 118 numbers

- 5.1 Most customers believe that 118 charges are higher than the charges for the old 192 system. This perception of a cost difference is higher amongst consumers who call from a fixed-line rather than a mobile phone, as shown in figure 18.
- 5.2 Understanding of call charges for fixed-line and mobile calls remains patchy; over a third of people feel unable to give an opinion on how the costs of calls to 118 numbers compare to the legacy 192. Two-fifths (42%) of fixed-line DQ users do not know how much their chosen supplier charges to obtain a single UK telephone number. Of those who are able to estimate a cost, the average estimate is 49p (similar to the November 2004 estimate of 48p). The actual average cost is 54p. 118 numbers in general are perceived by two-fifths (40%) to be more costly per call than 192 despite an overall view that competition will lead to price cuts (46% agreed with this statement).
- 5.3 The average perceived cost of a call to the former 192 system was 27p from a fixed-line, 22p cheaper than the equivalent perceived cost in the new competitive market, and 13p less than the actual legacy cost. Consumers continue to underestimate the previous cost of calls to 192. One in nine (11%) believe that the cost of 192 was free from a fixed-line phone and 3% that the service was free from a mobile.

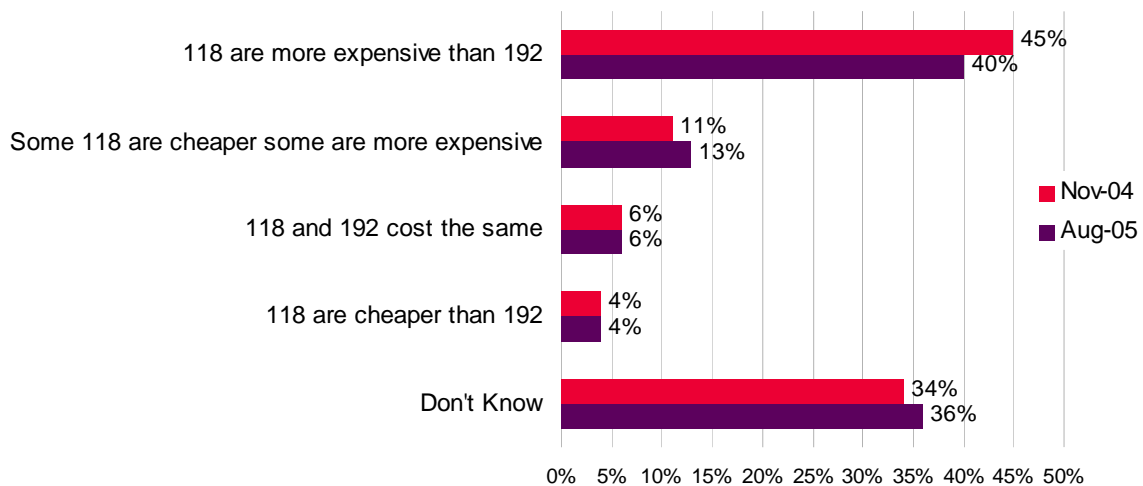
Figure 18. Perceptions of costs to call 192 and main 118 services



Base: All (518) calling one DQ number from fixed-line most often, All (107) calling one DQ number from mobile most often, All (2,095 UK adults 15+), November 2005, MORI survey

- 5.4 Many mobile DQ users don't know the cost of getting a telephone number from directory enquiries (39%). There is little consensus among those who offer an opinion as to what the actual cost is. The average expected cost of a call from a mobile to a DQ provider is 63p (14p more than the fixed-line equivalent and up from 59p in November 2004). Mobile DQ users are less likely than fixed-line DQ users to feel that their service is more expensive than the old 192 service (37% feel this is the case), although the balance of opinion is still that the new services cost more. Mobile users estimate that the cost of calling the old 192 service was 9p cheaper than its 118 equivalent.
- 5.5 On the whole 118 is seen to be more expensive than 192 though this is not universal and there remains confusion as to whether this is really the case or not, reflecting the true picture; one of wide variations in costs and lack of clarity in how the costs are calculated and communicated. Four in ten (40%) of UK adults see the 118 numbers as more expensive than 192 (down from 45% in November 2004), while over a third (36%) feels unable to say what the true price comparison is, illustrated in figure 19. Those aged 15-24 are least likely to think 118 more expensive.

Figure 19. '118' services are perceived to be more expensive than 192



Base: All (2,095 UK adults 15+), August 2005, MORI survey. Results are calculated by adding "agree strongly" and "tend to agree" responses

- 5.6 Less than half (46%) of UK adults are aware that prices vary between DQ providers (down significantly from 52% in November 2004), and a third (34%) are aware that some DQ operators offer different services compared with others (37% in November 2004). Currently a quarter (25%) consider that all providers offer the same services and 12% believe they all charge the same price.

Calculating costs for calling 118 numbers

5.7 The reason for this lack of understanding among consumers is linked to the current pricing structure of 118 services. Calculation of the prices of DQ calls is complex and the information is not always readily available. Costs vary by DQ provider and by the network from which calls are made (both fixed-line and mobile networks). DQ providers have a range of call pricing structures which add further complexity to understanding and calculating the cost of calls. The different costs structures employed by DQ operators are:

- 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).

Length of calls – average length is 45 seconds for a single number

5.8 Across the DQ market, the average length of call to a DQ provider to request a single number (where the information is available and correctly given to the operator) is 45 seconds, similar to the length of calls measured in the November and April 2004 studies.

5.9 Calls requesting a business number are on average five seconds shorter than calls requesting residential information (45 second compared to 50 seconds). Calls made from landlines take on average four seconds less than calls made from a mobile (43 seconds compared to 47 seconds) which is most likely due to some operators (where the service is available) enquiring whether or not the caller would like the information sent to their mobile phone via SMS. This service is not available when calling from a fixed-line network.

Cost of calls – average cost is 54p for a single number

5.10 The overall average cost of calling a 118 number from a BT landline to obtain a single telephone number is 54p¹³, 14p higher than the legacy 192 and 4p more than the average cost in November 2004.

Cost of calls from a fixed line

5.11 When calling 118 numbers from a fixed line, the cost varies widely depending on the carrier from which calls are made and the DQ operator being called. When calling from a BT fixed line, the cost of calling 29 of the 30 services ranges from 29p to 66p, with the other service costing 171p. The cheapest cost is to call 118 848 Conduit from

¹³ This is calculated from the weighted overall DQ market, ie it takes into account the market share of each provider and their associated costs. Costs only take into account the cost of calling 118 providers from a BT landline

ntl (for a flat fee of 27p irrespective of the length of the call) or BT's 118 707 from a BT or ntl telephone (for a flat fee of 29p). At the other extreme, calling 11 88 66 Ring True from a BT line would cost 171p (based on the average call duration of 45 seconds) over a pound more than the cost of calling any other provider tested in the study from a fixed line.

- 5.12 To give a further example of the scale of price variation for a 45 second call, on the BT network alone 13 operators charge 40p or less (either equivalent to, or less than the legacy 192). A further 12 operators charge between 41p and 60p and four operators charge between 61 and 70p. Only one charges more.
- 5.13 Availability also differs widely. On the BT network calls can be made to all 30 DQ providers assessed in the study, whereas only 6 DQ providers can currently be called from the Telewest network. Figure 20 gives costs and availability of all DQ providers for the main fixed-line networks: BT, ntl and Telewest

Figure 20. Comparison of costs (in pence) between fixed-line telephone companies/ carriers across individual DQ operators where available (based on average call duration)

DQ No.	BT	Telewest	Ntl	Accuracy
Overall market average	Average price per call on the BT network: 54p			90%
118 000	49	n/a	n/a	82%
118 080	50	n/a	n/a	88%
118 099	35	n/a	n/a	90%
118 111 ¹⁴	35	n/a	n/a	87%
118 114	40	n/a	n/a	92%
118 118	60	60	60	93%
118 119	49	n/a	n/a	91%
118 180	46	46	n/a	92%
118 212	40	n/a	n/a	86%
118 247	53	n/a	53	87%
118 288	44	n/a	n/a	88%
118 321	35	n/a	n/a	90%
118 355	30	n/a	n/a	86%
118 404 Welsh	66	n/a	n/a	82%
118 429	50	n/a	n/a	87%
118 453	41	n/a	n/a	85%
118 499	54	n/a	n/a	88%
118 500	53	n/a	40	89%
118 511	35	n/a	n/a	88%
118 707	29	n/a	29	86%
118 747	63	n/a	n/a	88%
118 770	30	30	n/a	92%
118 800	55	n/a	n/a	86%
118 811	40	41	40	89%
118 848	30	n/a	27	88%
11 88 66	171	n/a	n/a	87%
118 877	33	n/a	n/a	89%
118 878	40	n/a	40	91%
118 888	62	58	57	87%
118 888 Welsh	61	57	57	83%

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

¹⁴ Note calls to 118 111 from Onetel are free

Cost of calls from a mobile

- 5.14 Calling 118 numbers from a mobile is also very varied, and is, on average, more expensive than calling a 118 number from a land line. Most calls lie in the range 60-70p range, though there are some extremes with eight DQ providers charging £1.00 per call or more for calls from mobiles. Across the board “3” tends to be the least expensive network.
- 5.15 Based on the average call length found in this study of 45 seconds, the least expensive call to a 118 number from a mobile is to call 118 888 Conduit from a Virgin mobile (40p). The most expensive is to call 118 499 Share Charity from an Orange mobile (£2.00).
- 5.16 Availability on the mobile networks again varies, though the majority of DQ operators (20 plus for all networks) can be called from all networks, “3” allows calls to all DQ providers tested, as shown in figure 21.

Figure 21. Comparison of costs (in pence) between mobile networks across all individual DQ operators where available (based on average call duration)

DQ No.	Orange	O ₂	Tmobile	Vodafone	Virgin	'3'	Accuracy
118 000	59	n/a	100	75	100	70	82%
118 080	60	65	n/a	180	n/a	49	88%
118 099	60	50	65	50	65	50	90%
118 111 ¹⁵	60	80	65	50	65	50	87%
118 114	n/a	80	65	n/a	65	50	92%
118 118	85	65	75	87	75	75	93%
118 119	85	65	65	70	65	50	91%
118 180	n/a	65	n/a	n/a	n/a	50	92%
118 212	60	65	n/a	n/a	60	50	86%
118 247	62	65	62	62	67	52	87%
118 288	60	50	75	50	75	50	88%
118 321	60	80	65	n/a	65	50	90%
118 355	60	50	65	n/a	65	50	86%
118 404	85	74	100	45	75	50	82%
118 429	60	65	65	43	65	75	87%
118 453	60	65	65	83	69	50	85%
118 499	200	65	65	n/a	65	75	88%
118 500	85	46	65	n/a	65	50	89%
118 511	60	80	n/a	60	n/a	50	88%
118 707	85	65	65	65	65	50	86%
118 747	85	100	n/a	75	n/a	150	88%
118 770	n/a	50	n/a	n/a	n/a	50	92%
118 800	60	65	65	69	65	75	86%
118 811	60	50	65	90	67	50	89%
118 848	60	50	n/a	55	n/a	50	88%
11 88 66	60	65	65	69	65	175	87%
118 877	60	65	65	50	65	50	89%
118 878	n/a	n/a	n/a	n/a	n/a	50	91%
118 888	60	65	65	60	40	75	87%
118 888 Wales	60	65	65	60	40	75	83%

Base: All standard calls (c300 to each provider), November 2004, MORI survey

¹⁵ Note calls to 118 111 from Onetel are free

Average costs on mobile and fixed-line networks

- 5.17 Using a simple unweighted average of call costs for the available DQ providers allows a direct comparison to be made across the main fixed line and mobile carrier networks. As mentioned, mobile carriers generally charge more than landlines for DQ calls. When calling from a BT line, the average call charge across the 30 DQ operators is 49p. (This figure has been calculated by averaging the per call cost to each DQ provider available on the fixed line carrier. This calculation does not seek to replicate the overall DQ market; it does not take into account market share or the proportion of business and residential calls that are included in the weighted DQ market average.)
- 5.18 The average cost of a call from Telewest is also (49p); ntl costs (45p) again calculated using a simple unweighted average of call costs. The average call costs from all three fixed-line carriers have risen since November 2004. On average a single call to a 118 number made from a BT fixed line phone now costs 7p more per call than in November 2004, although costs associated with Telewest and ntl DQ services have also increased, as shown in figure 22.
- 5.19 The most expensive mobile network remains Orange (71p) closely followed by Vodafone and T-mobile (both 69p). Mobile costs overall remain broadly similar to November 2004, though “3” has reduced its costs by around 4p per call, as shown in figure 22.

Figure 22. Comparison of costs between different telephone operators/ carriers across the DQ market (based on the average call time)

Telephone company/ carrier	November 2005 Mean cost across available tested DQ numbers (pence)	November 2004 Mean cost across available tested DQ numbers (pence)
Fixed-line		
BT	49p	42p
Telewest	49p	43p
ntl	45p	39p
Mobile		
Orange	71p	71p
O2	65p	64p
T-Mobile	69p	68p
Vodafone	69p	67p
Virgin	66p	66p
3	63p	67p
Weighted DQ market average when calling from a fixed-line (based on calls from BT network)	54p	50p

Base: All requests 8,787, November 2005, MORI survey

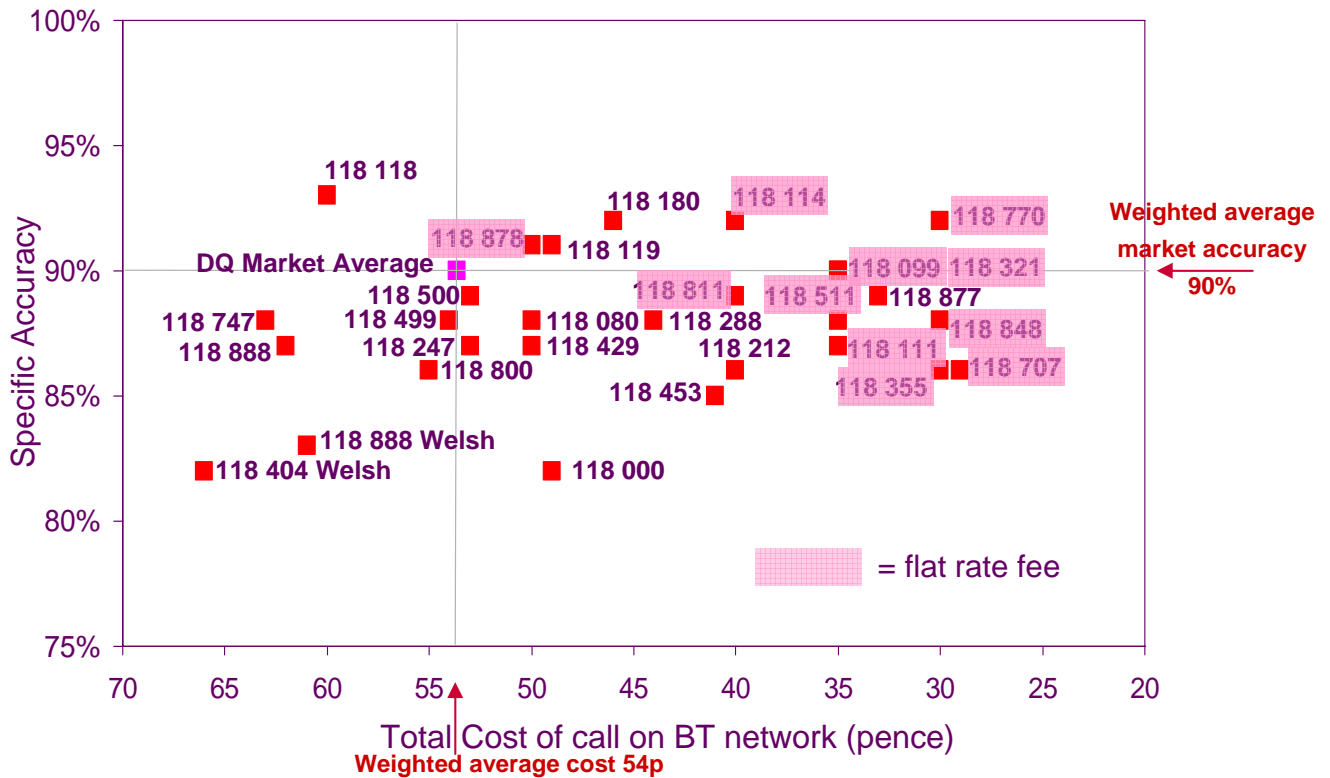
Costs and accuracy

5.20 The following series of charts plot the average cost of a call (on the x-axis) against the accuracy of each DQ provider (y-axis). Also plotted is the overall market average; 54p for a 45 second call. In this way those with the higher levels of overall accuracy and with the relatively lower call charges can be identified, and hence show those providers offering best “value”. The more accurate the provider, the higher up the chart and the less expensive the further to the right, so those offering best “value” appear in the upper right-hand corner. Note that 11 88 66 Ring True is not included on the BT network charts. To include it would adversely affect the portrayal of the majority of the results as the scale would have to be greatly expanded.

5.21 As noted in November 2004, 118 services offered at a flat rate tend to have both relatively low costs and high levels of accuracy. However, there is no clear correlation between accuracy and price – it is not necessarily a case of “getting what you pay for”.

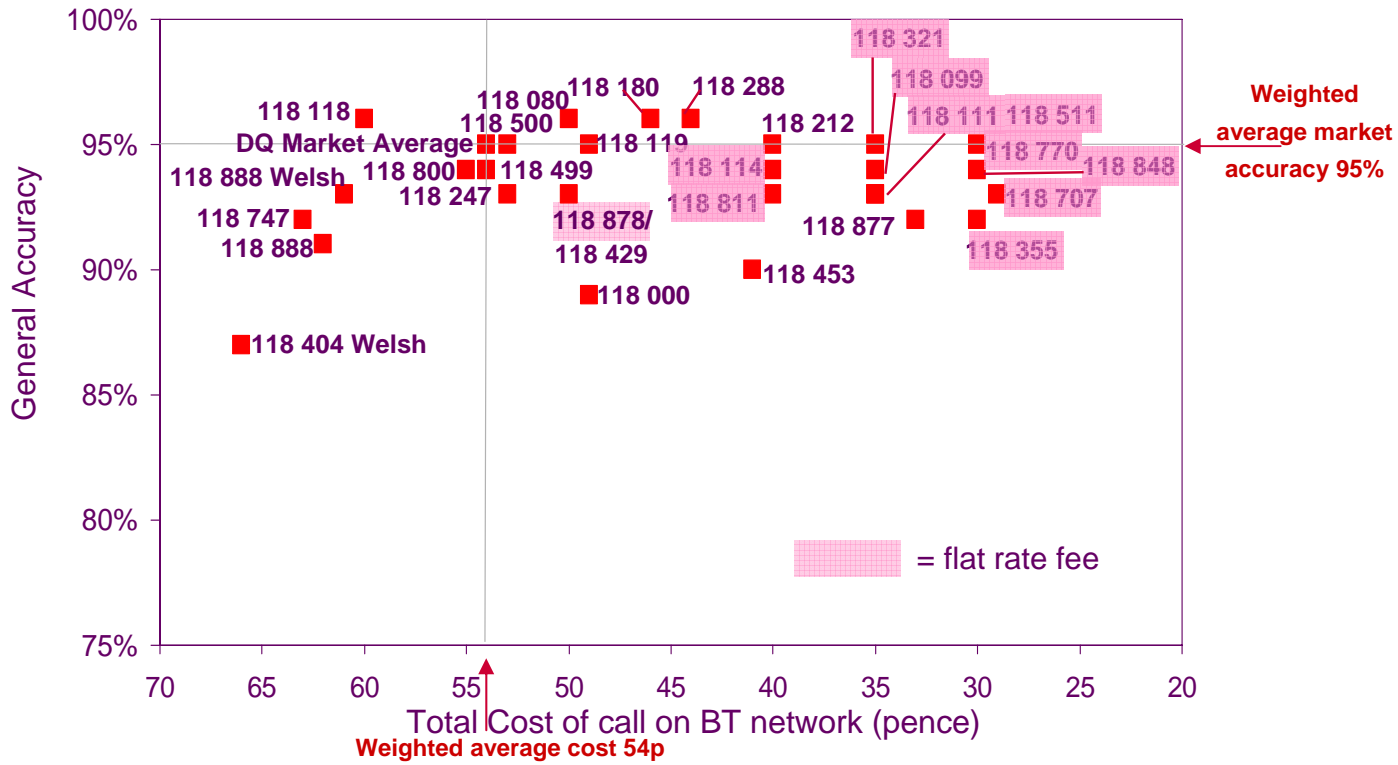
5.22 Although by no means the cheapest, The Number’s 118 118 has the highest specific accuracy of all providers. 118 770 Telewest, 118 321 Tesco, 118 114 Opal and 118 099 Cable&Wireless (charged as a flat fee) have relatively high levels of specific accuracy and charge a relatively low cost. They are also “good value” providers for general accuracy, together with 118 111 Onetel, 118 511 British Gas, 118 848 Conduit and 118 707 BT (again all flat rate charges). Of the DQ providers not costed on a flat rate fee, 118 180 Telewest, 118 288 Kingston and 118 212 Maureen all perform relatively well, as shown in figures 23 and 24.

Figure 23. ‘Specific accuracy’ of all calls: accuracy of information and average cost of calls via the BT network



Base: All calls (c300 to each provider), November 2005, MORI survey

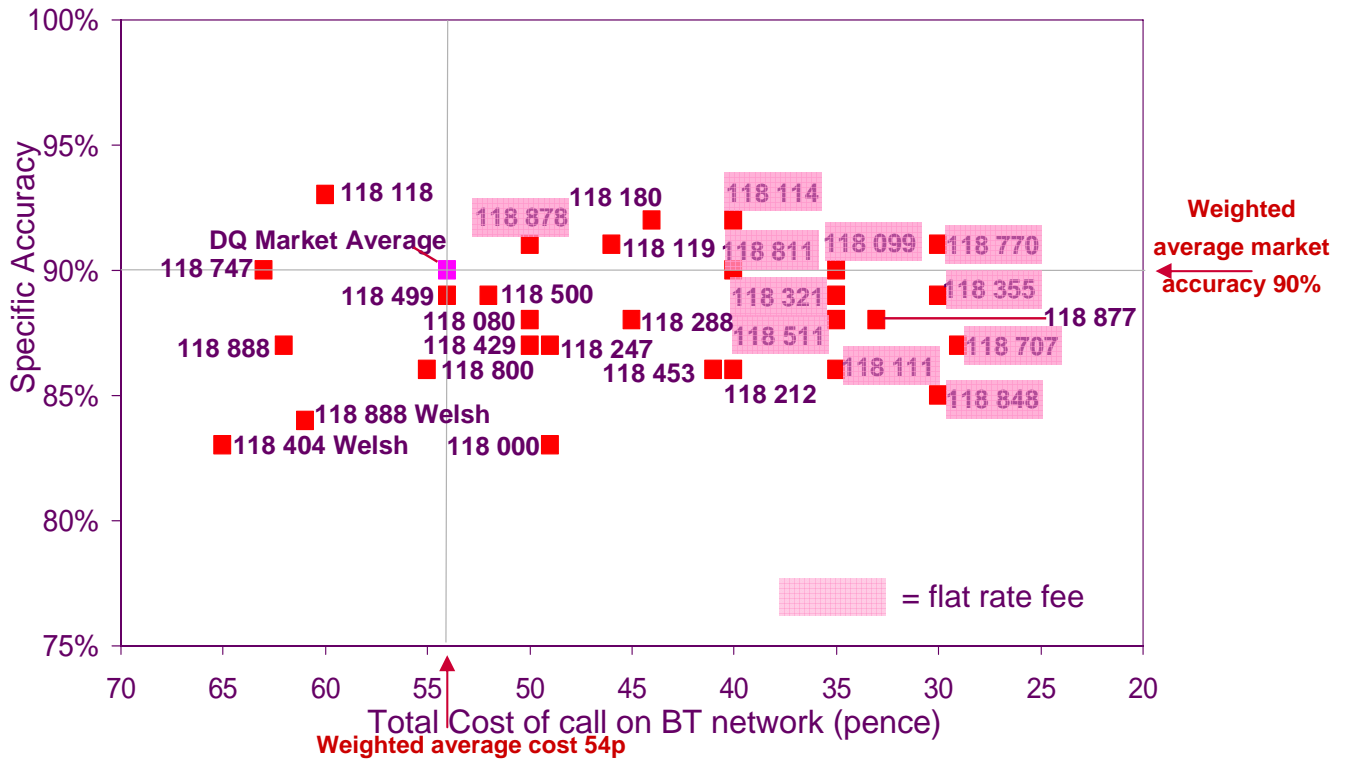
Figure 24. 'General accuracy' of all calls: accuracy of information and average cost of calls via the BT network¹⁶



Base: All calls (c300 to each provider), November 2005, MORI survey

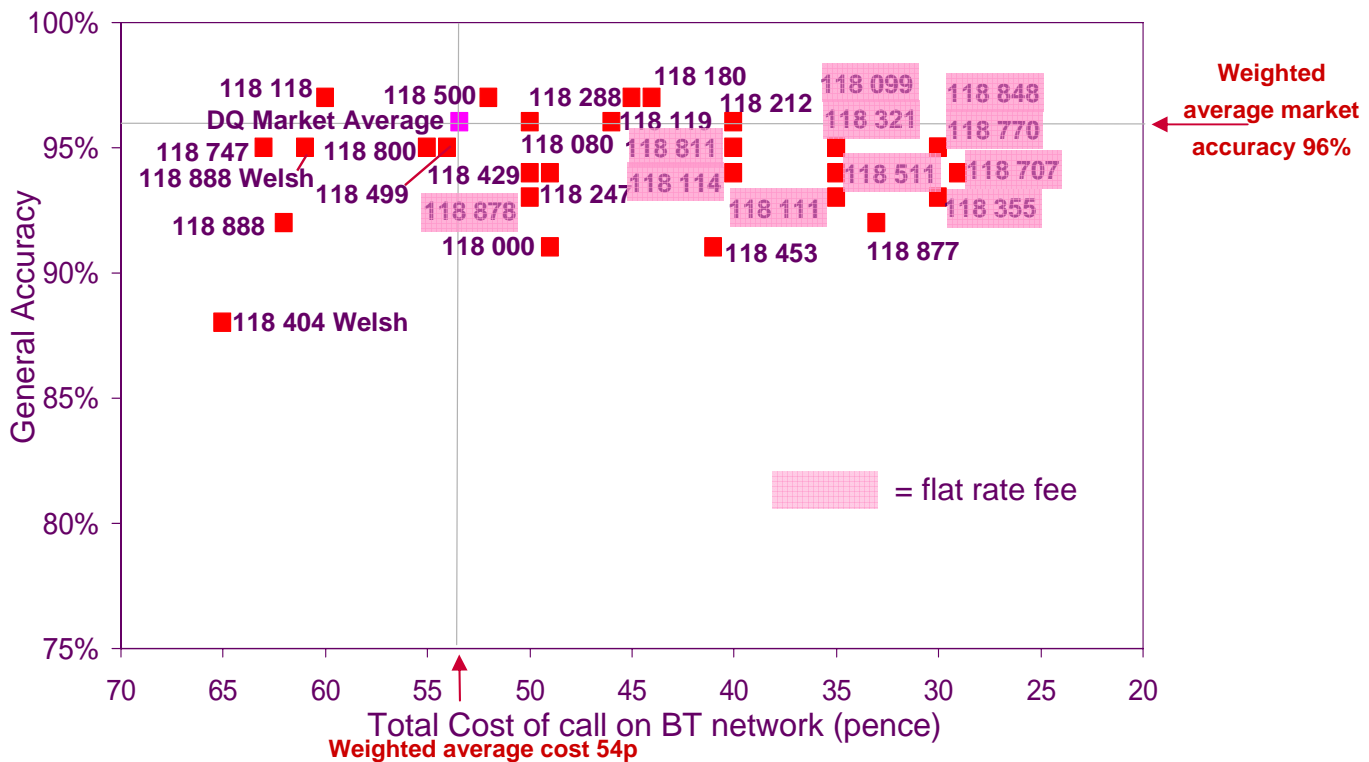
5.23 The picture for business calls is very similar to that of the overall picture; again those costed on a flat fee tend to be less expensive but with accuracy levels similar to the average.

Figure 25. 'Specific accuracy' of business calls only: accuracy of information and average cost of calls via the BT network



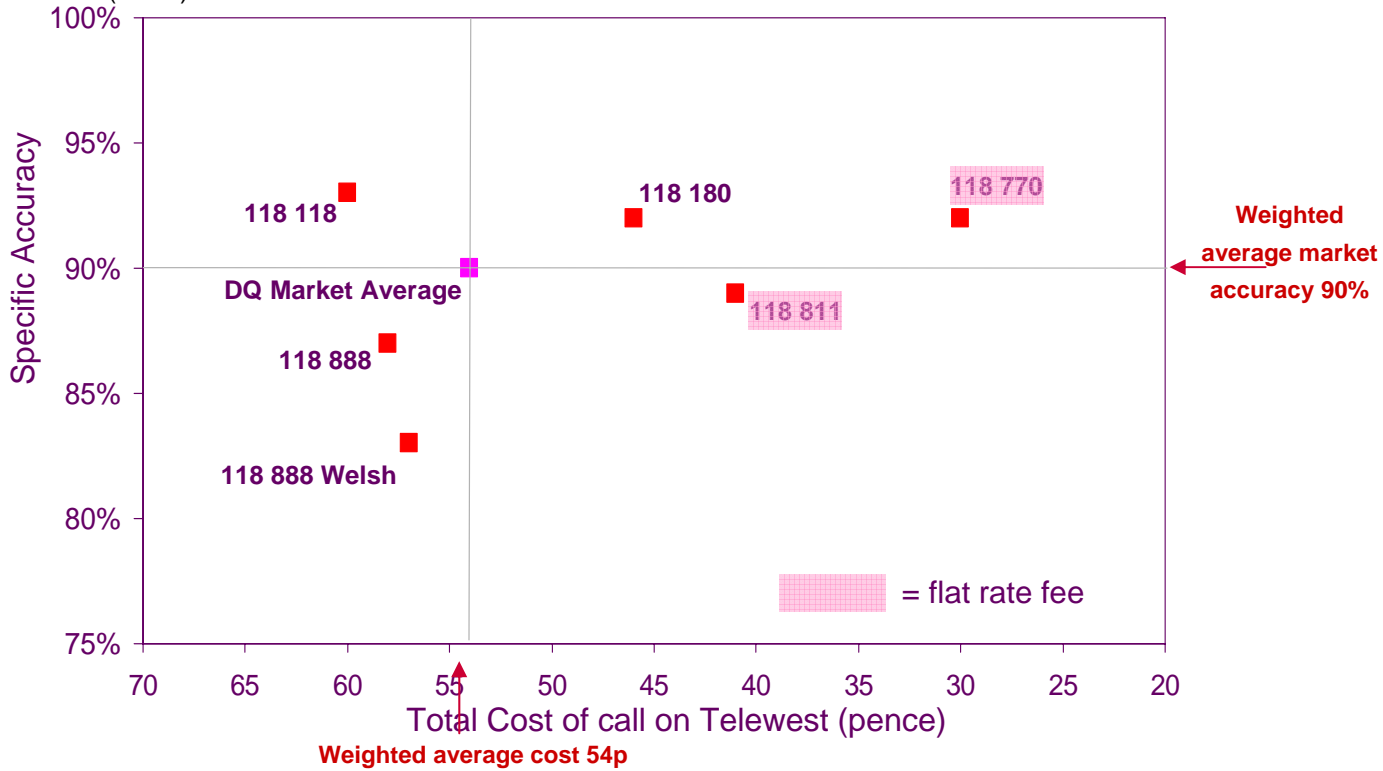
Base: All business calls (c200 to each provider), November 2005, MORI survey

Figure 26. 'General accuracy' of business calls only: accuracy of information and average cost of calls via the BT network



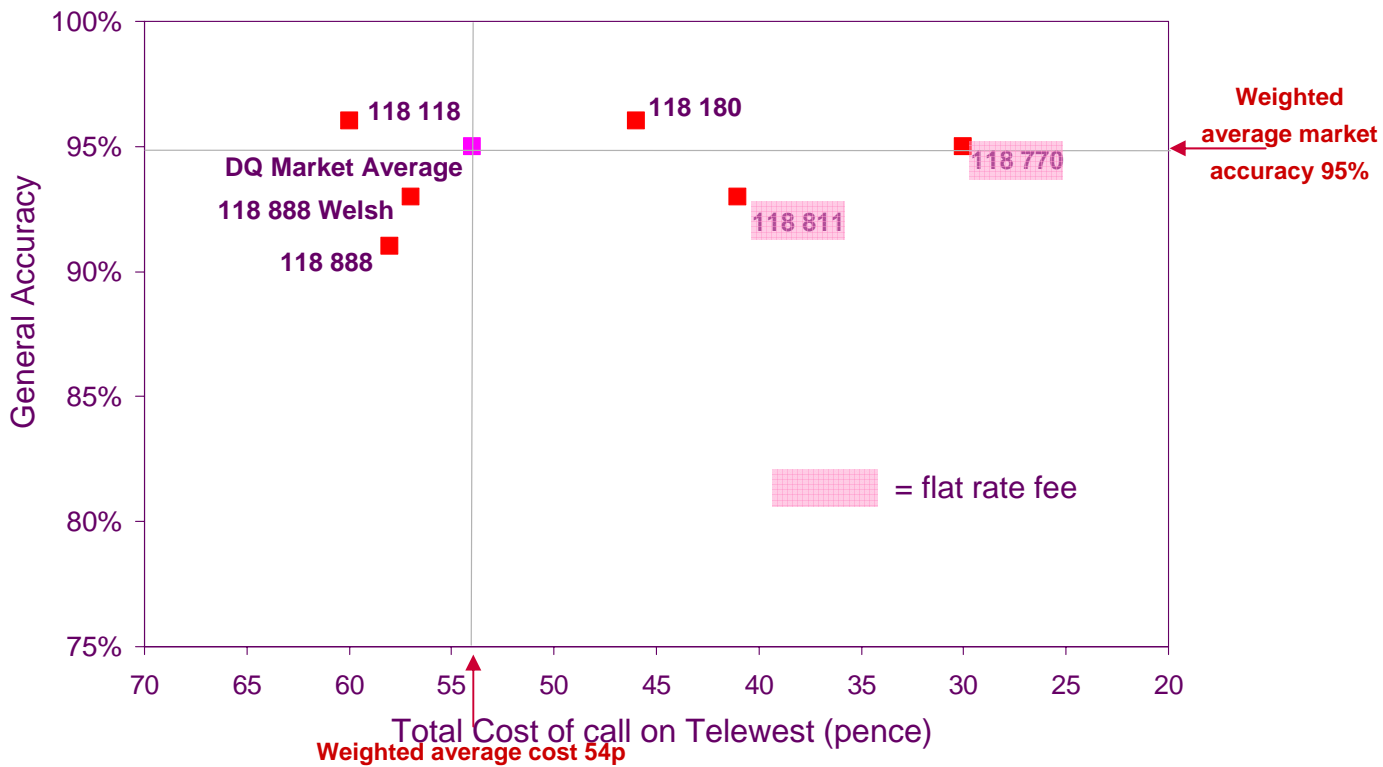
Base: All business calls (c200 to each provider), November 2005, MORI survey

Figure 28. 'Specific accuracy' of all calls: accuracy of information and average cost of calls via the Telewest (cable) network



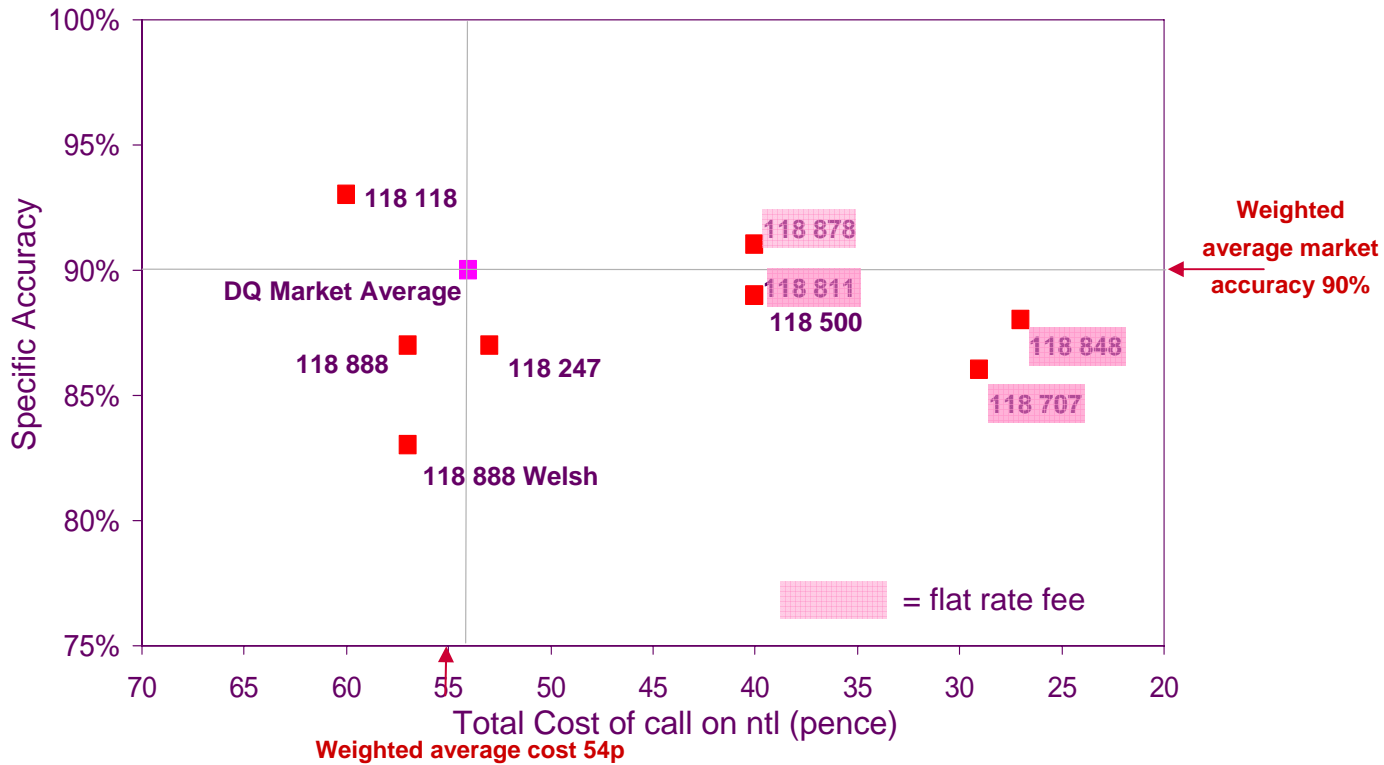
Base: All calls (c300 to each provider), November 2004, MORI survey

Figure 29. 'General accuracy' of all calls: accuracy of information and average cost of calls via the Telewest (cable) network



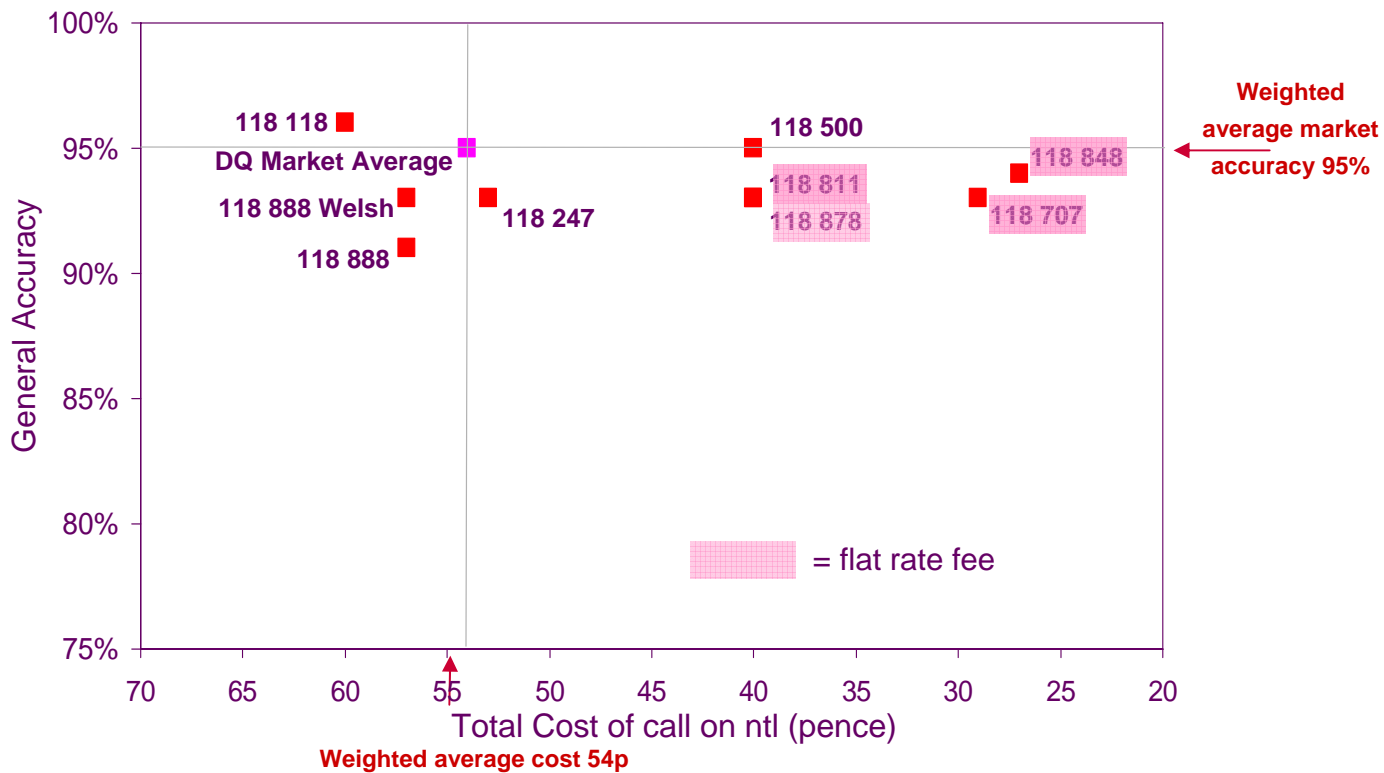
Base: All calls (c300 to each provider), November 2004, MORI survey

Figure 30. 'Specific accuracy' of all calls: accuracy of information and average cost of calls via the ntl network



Base: All calls (c300 to each provider), November 2005, MORI survey

Figure 31. 'General accuracy' of all calls: accuracy of information and average cost of calls via the ntl network



Base: All calls (c300 to each provider), November 2005, MORI survey

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 preceding each following 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 proposed to be tested 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.

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

- 6.4 In 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 the current research a total of 14 DQ providers were assessed on the provision of charging information when using the call connect service and 11 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 service

	DQ Provider	Standard	Call connect	Text-back
1	118 000 – Orange	✓	✓	✓
2	118 080 – Simunix	✓	✓	✓
3	118 099 - Cable&Wireless	✓		
4	118 111 - Onetel	✓		
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 - Ring True	✓		
14	118 404 - BT (Welsh)	✓	✓	✓
15	118 429 - 118 GAY	✓		
16	118 453 - GAY-LO Directories 453	✓		✓
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 - Ring True	✓	✓	✓
27	118 877 - Telco Global	✓	✓	
28	118 878 – NTL	✓		
29	118 888 – Conduit	✓	✓	✓
30	118 888 - Conduit (Welsh)	✓		
		30 in total	14 in total	11 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 call minutes 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. The industry was aware that Ofcom and ICSTIS were conducting a further mystery shopping exercise in 2005, but was not aware of the precise timing and details, in order to protect the study's objectivity.
- 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 project.
- 6.7 Calls were initially recorded on paper scripts which allowed flexibility in the order in which questions were posed, answered and information recorded. During the call all time information was recorded using digital clocks, measured to the nearest second.

Data recorded during each call were transferred on to a CATI (Computer Aided Telephone Interviewing) system from which subsequent analysis was run. Where calls were made from call centres, data were transferred to CATI immediately; where calls were made from other locations, data were returned to the call centre for entry after a maximum of one week.

- 6.8 Calls were made from a variety of originating lines and locations including MORI's telephone centres in London and Edinburgh, mobile phones on each of the six main mobile networks, Orange, Vodafone, O2, T-Mobile, 3 and Virgin, and from private BT lines. 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: with the exception of 118 212 and 118 747 which cannot be called from the Virgin network (requests were divided between the remaining five networks).
- 6.9 When conducting calls from the London, Edinburgh and Welsh fixed-lines the originating number was withheld, either by dialling the prefix 141 in advance of any call, or by programming the PBX (Private Branch Exchange) to insert this automatically on all outgoing calls. This procedure is in place to ensure the anonymity of callers and to retain the 'mystery' element of mystery shopping. However, when it became evident that some DQ operators were aware of originating lines despite these precautions, the methodology was amended so all remaining calls were only made from mobiles (across available networks) and fixed-lines in private homes.

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. To address concerns that some providers could identify mystery shopping calls in November 2004, a completely new set of requests was drawn for this wave. Each request was made only once to each DQ provider.
- 6.12 On completion of fieldwork all numbers were re-verified with OSIS. Four residential and three business 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 210 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 connected to the exact business in question, to the same business but in a different location or department or to a different business.
- 6.14 Some DQ providers have agreements with some corporate customers with regard to their preferred number/s to be given out to consumers. Ofcom has taken this into account in its analysis of the overall accuracy of the market and the accuracy of business requests. Ofcom has defined positive outcomes in two ways:

- **'specific accuracy'** – this measure replicates the 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 defined as '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:

	Business requests	Domestic requests
Daytime (9am – 5pm)	72%	58%
Evening	11%	21%
Late Night	3%	4%
Weekends	14%	17%

6.16 In total 8,787 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).

6.17 300 standard requests were made to each provider (200 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. However, some 118 services share call centres, and it is possible therefore, that an operator could have been asked the same request more than once.

6.19 The scenarios used in the study were:

- *200 different business requests*: requesting the telephone number of a UK business. A range of businesses spread across the country were requested.
- *100 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 50 different business requests and 50 different residential requests were used. Again, a geographic spread of numbers was requested.

Weighting the data for individual providers' scores

6.20 The overall individual DQ service score is weighted to the known profile of the approximate business and residential split only (85% of requests to 118 numbers are business requests and 15% 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.

6.21 Where performance of residential requests or business requests are compared between providers, unweighted data are shown.

Overall DQ market accuracy score

6.22 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 *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. No other weights have been applied to the data.

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>	85
<i>Requests for residential numbers</i>	15
Individual market share ¹⁷	Confidential

6.23 Data shown for text-back and call connect is unweighted.

Changes to the weights applied to the data

6.24 In the previous two waves of research conducted in 2004, the overall market picture was weighted to a slightly different regime which included:

- the business and domestic split (which at the time was given by the industry as 87% business calls and 13% residential calls)
- market share information (which again has been updated to reflect the current picture)
- time taken to provide the information (split by calls answered in up to 60 seconds and those answered in 60 plus seconds). This element of the weighting was applied to try and replicate the “real world” situation where some calls take longer than others, and that on average, calls that take a long time are less likely to result in correct information being given. Ofcom have not been provided with up to date

¹⁷ This confidential information was based on call volume data from the DQ providers

information on the number of calls to 118 numbers that are answered within a minute, and felt that using historic data may provide an inaccurate representation of the current performance of the market. In the data published here, therefore, this weighting element has been removed from the overall market picture including the historic waves.

Pricing structures

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

6.26 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)

6.27 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
- charity donations made from each call

Consumer Attitudes Survey methodology and materials

6.28 Questions were placed on the MORI Omnibus, the regular MORI survey among the general public. A nationally representative quota sample of 2,095 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 28th July and 1st August 2005.

Annex A

Consumer attitudes Questionnaire

Awareness, use and opinion of new DQ services

ASK ALL
 Q1. SHOWCARD OFB **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 ONLY FOR EACH**

(a) Any national UK directory enquiries?

(b) International Directory enquiries?

	(a) National	(b) International
More than 5 times a week	1	1
2 to 5 times a week	2	2
At least once a week	3	3
At least once a month	4	4
At least once a year	5	5
Less frequently than once a year	6	6
Never	7	7
Don't know	8	8

ASK ALL WITH A MOBILE AND FIXED PHONE THAT EVER USE NATIONAL UK DQ SERVICES (CODES 1-6 AT Q1(a) OR Q1(b), OTHERS GO TO Q3)

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

Mainly from fixed	1
Mainly from mobile	2
Both about the same	3
Don't know	4

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.

192	1
118 000 Orange	2
118 080 Simunix	3
118 099 Cable&Wireless	4
118 111 Onetel	5
118 114 Opal	6
118 118 The Number	7
118 119 192.com	8
118 141 BT payphone	9
118 158 Starcomm	10
118 180 Telewest	11
118 181 Smile Assistance	12
118 192	13
118 212 Maureen	14
118 234 Reach Telecom	15
118 247 Yell	16
118 288 Kingston	17
118 321 Tesco	18
118 355 Ring True	19
118 404 BT (Welsh)	20
118 429 118 GAY	21
118 453 GAY-LO Directories 453	22
118 499 Share Charity	23
118 500 BT	24
118 505	25
118 511 British Gas	26
118 555 UKDA	27
118 622	28
118 707 BT	29
118 747 UK Directory Assistance	30
118 770 Telewest	31
118 800 Directory Enquiries UK	32
118 811 The Number	33
118 848 Conduit	34
118 877 Telco Global	35
118 878 NTL	36
11 88 66 Ring True	37
118 888 Conduit	38
Other 118 number (CODE '39' AND WRITE IN)	39
Other NON 118 number (CODE '40' AND WRITE IN)	40
None	41
Don't know	42

ASK ALL THAT USE A NATIONAL UK DIRECTORY ENQUIRY (CODES 1-6 AT Q1(a), OTHERS GO TO Q11)

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 READ OUT. SINGLE CODE ONLY FOR EACH

	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
192	1	2	3	4
118 000 Orange	1	2	3	4
118 080 Simunix	1	2	3	4
118 099 Cable&Wireless	1	2	3	4
118 111 Onetel	1	2	3	4
118 114 Opal	1	2	3	4
118 118 The Number	1	2	3	4
118 119 192.com	1	2	3	4
118 141	1	2	3	4
118 158 Starcomm	1	2	3	4
118 180 Telewest	1	2	3	4
118 181 Smile Assistance	1	2	3	4
118 192	1	2	3	4
118 212 Maureen	1	2	3	4
118 234 Reach Telecom	1	2	3	4
118 247 Yell	1	2	3	4
118 288 Kingston	1	2	3	4
118 321 Tesco	1	2	3	4
118 355 Ring True	1	2	3	4
118 404 BT (Welsh)	1	2	3	4
118 429 118 GAY	1	2	3	4
118 453 GAY-LO Directories 453	1	2	3	4
118 499 Share Charity	1	2	3	4
118 500 BT	1	2	3	4
118 505	1	2	3	4
118 511 British Gas	1	2	3	4
118 555 UKDA	1	2	3	4
118 622	1	2	3	4
118 707 BT	1	2	3	4
118 747 UK Directory Assistance	1	2	3	4
118 770 Telewest	1	2	3	4
118 800 Directory Enquiries UK	1	2	3	4
118 811 The Number	1	2	3	4
118 848 Conduit	1	2	3	4
118 877 Telco Global	1	2	3	4
118 878 NTL	1	2	3	4
Other 118 number (CODE '1', '2', '3' OR '4' AND WRITE IN)	1	2	3	4
Other NON 118 number (CODE '1', '2', '3' OR '4' AND WRITE IN)	1	2	3	4

REDUCE LIST TO EXCLUDE THOSE MENTIONED AT Q4
 ASK ALL THAT USE A NATIONAL UK DIRECTORY ENQUIRY (CODES 1-6 AT Q1(a), OTHERS GO TO Q11)

Q5. SHOWCARD OFE **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?** SINGLE CODE ONLY FOR EACH

	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
192	1	2	3	4
118 000 Orange	1	2	3	4
118 080 Simunix	1	2	3	4
118 099 Cable&Wireless	1	2	3	4
118 111 Onetel	1	2	3	4
118 114 Opal	1	2	3	4
118 118 The Number	1	2	3	4
118 119 192.com	1	2	3	4
118 141	1	2	3	4
118 158 Starcomm	1	2	3	4
118 180 Telewest	1	2	3	4
118 181 Smile Assistance	1	2	3	4
118 192	1	2	3	4
118 212 Maureen	1	2	3	4
118 234 Reach Telecom	1	2	3	4
118 247 Yell	1	2	3	4
118 288 Kingston	1	2	3	4
118 321 Tesco	1	2	3	4
118 355 Ring True	1	2	3	4
118 404 BT (Welsh)	1	2	3	4
118 429 118 GAY	1	2	3	4
118 453 GAY-LO Directories 453	1	2	3	4
118 499 Share Charity	1	2	3	4
118 500 BT	1	2	3	4
118 505	1	2	3	4
118 511 British Gas	1	2	3	4
118 555 UKDA	1	2	3	4
118 622	1	2	3	4
118 707 BT	1	2	3	4
118 747 UK Directory Assistance	1	2	3	4
118 770 Telewest	1	2	3	4
118 800 Directory Enquiries UK	1	2	3	4
118 811 The Number	1	2	3	4
118 848 Conduit	1	2	3	4
118 877 Telco Global	1	2	3	4
118 878 NTL	1	2	3	4
11 88 66 Ring True	1	2	3	4
118 888 Conduit	1	2	3	4
Other 118 number (CODE '1', '2', '3' OR '4' AND WRITE IN)	1	2	3	4
Other NON 118 number (CODE '1', '2', '3' OR '4' AND WRITE IN)	1	2	3	4

None	1	2	3	4
Don't know	1	2	3	4

ASK ALL WHO HAVE CALLED MORE THAN ONE LISTED NUMBER FROM FIXED-LINE AT Q4 OR Q5 COLUMN (A) – ANY CODE '1'. OTHER GO TO Q7

Q6. SHOWCARD OFE AGAIN **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 Q4 OR Q5

192	1
118 000 Orange	2
118 080 Simunix	3
118 099 Cable&Wireless	4
118 111 Onetel	5
118 114 Opal	6
118 118 The Number	7
118 119 192.com	8
118 141	9
118 158 Starcomm	10
118 180 Telewest	11
118 181 Smile Assistance	12
118 192	13
118 212 Maureen	14
118 234 Reach Telecom	15
118 247 Yell	16
118 288 Kingston	17
118 321 Tesco	18
118 355 Ring True	19
118 404 BT (Welsh)	20
118 429 118 GAY	21
118 453 GAY-LO Directories 453	22
118 499 Share Charity	23
118 500 BT	24
118 505	25
118 511 British Gas	26
118 555 UKDA	27
118 622	28
118 707 BT	29
118 747 UK Directory Assistance	30
118 770 Telewest	31
118 800 Directory Enquiries UK	32
118 811 The Number	33
118 848 Conduit	34
118 877 Telco Global	35
118 878 NTL	36
11 88 66 Ring True	37
118 888 Conduit	38
Other 118 number (CODE '39' AND WRITE IN)	39
Other NON 118 number (CODE '40' AND WRITE IN)	40
None	41
Don't know	42

ASK ALL WHO HAVE CALLED MORE THAN ONE LISTED NUMBER FROM MOBILE PHONE at Q4 OR Q5 COLUMN (B) ANY CODE '2'. OTHER GO TO Q8

Q7. SHOWCARD OFE AGAIN **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	1
118 000 Orange	2
118 080 Simunix	3
118 099 Cable&Wireless	4
118 111 Onetel	5
118 114 Opal	6
118 118 The Number	7
118 119 192.com	8
118 141	9
118 158 Starcomm	10
118 180 Telewest	11
118 181 Smile Assistance	12
118 192	13
118 212 Maureen	14
118 234 Reach Telecom	15
118 247 Yell	16
118 288 Kingston	17
118 321 Tesco	18
118 355 Ring True	19
118 404 BT (Welsh)	20
118 429 118 GAY	21
118 453 GAY-LO Directories 453	22
118 499 Share Charity	23
118 500 BT	24
118 505	25
118 511 British Gas	26
118 555 UKDA	27
118 622	28
118 707 BT	29
118 747 UK Directory Assistance	30
118 770 Telewest	31
118 800 Directory Enquiries UK	32
118 811 The Number	33
118 848 Conduit	34
118 877 Telco Global	35
118 878 NTL	36
11 88 66 Ring True	37
118 888 Conduit	38
Other 118 number (CODE '39' AND WRITE IN)	39
Other NON 118 number (CODE '40' AND WRITE IN)	40
None	41
Don't know	42

ASK ALL WHO USE ONE LISTED NUMBER FROM FIXED MOST OFTEN AT Q6. OTHERS GO TO Q9

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. OTHERS GO TO Q10

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?

	Q8 Fixed phone	Q9 Mobile phone
It's the new BT directory enquiries number	1	1
I remembered it from their advertising	2	2
Q8 Recommended by a friend/relative/someone else (CODE '3' AND PROBE WHAT WAS RECOMMENDED, WRITE IN)	3	
Q9 Recommended by a friend/relative/someone else (CODE '3' AND PROBE WHAT WAS RECOMMENDED, WRITE IN)		3
It is the cheapest	4	4
It offers the best service	5	5
It offers specific services (e.g. Cinema/TV listings)	6	6
They will connect the call for you	7	7
It was the only one I knew	8	8
Just to try it out	9	9
Easy to remember	10	10
Knowledgeable operators/ agents	11	11
Redirected from 192/freephone number	12	12
Received in a text message	13	13
To have the number text-back (CODE ONLY AVAILABLE FOR Q22)	14	14
Cheapest call connect service	15	15
Other number I tried was engaged	16	16
They give you the correct number	17	17
Other Q21 (CODE '18' AND WRITE IN)	18	
Other Q22 (CODE '18' AND WRITE IN)		18
Don't know	19	19

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" AT Q6. OTHERS GO TO Q11]

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	1
I remembered it from their advertising	2
Recommended by a friend/relative/someone else (CODE '3' AND PROBE WHAT WAS RECOMMENDED, WRITE IN)	3
It is the cheapest	4
It offers the best service	5
It offers classified listings	6
They will connect the call for you	7
It was the only one I knew	8
Just to try it out	9
Easy to remember	10
Knowledgeable operators/ agents	11
Received in a text message	12
To have the number text-back	13
Cheapest call connect service	14
Other number I tried was engaged	15
They give you the correct number/most accurate	16
To have the number text-back to me	17
Other (CODE '18' AND WRITE IN)	18
Don't know	19

ASK ALL

Q11. SHOWCARD OFE **And which other national UK directory enquiry providers do you recognise, but have not necessarily called?**

DO NOT READ OUT. CODE ALL THAT APPLY.

192		1
118 000	Orange	2
118 080	Simunix	3
118 099	Cable&Wireless	4
118 111	Onetel	5
118 114	Opal	6
118 118	The Number	7
118 119	192.com	8
118 141		9
118 158	Starcomm	10
118 180	Telewest	11
118 181	Smile Assistance	12
118 192		13
118 212	Maureen	14
118 234	Reach Telecom	15
118 247	Yell	16
118 288	Kingston	17
118 321	Tesco	18
118 355	Ring True	19
118 404	BT (Welsh)	20
118 429	118 GAY	21
118 453	GAY-LO Directories 453	22
118 499	Share Charity	23
118 500	BT	24
118 505		25
118 511	British Gas	26
118 555	UKDA	27
118 622		28
118 707	BT	29
118 747	UK Directory Assistance	30
118 770	Telewest	31
118 800	Directory Enquiries UK	32
118 811	The Number	33
118 848	Conduit	34
118 877	Telco Global	35
118 878	NTL	36
11 88 66	Ring True	37
118 888	Conduit	38
	Other 118 number (CODE '39' AND WRITE IN)	39
	Other NON 118 number (CODE '40' AND WRITE IN)	40
	None	41
	Don't know	42

ASK ALL WHO USE ONE LISTED NUMBER MOST OFTEN FROM FIXED-LINE AT Q6 OTHERS GO TO Q13
 Q12. SHOWCARD OFH **How satisfied are you with the overall service provided by [INSERT NUMBER CALLED MOST FREQUENTLY FROM FIXED AT Q6] when calling from your fixed phone?**

Very satisfied	1
Fairly satisfied	2
Neither satisfied nor dissatisfied	3
Fairly dissatisfied	4
Very dissatisfied	5
Don't know/can't remember	6

ASK ALL WHO USE ONE LISTED NUMBER MOST OFTEN FROM MOBILE LINE AT Q7 OTHERS GO TO Q14
 Q13. SHOWCARD OFH AGAIN **How satisfied are you with the overall service provided by [INSERT NUMBER CALLED MOST FREQUENTLY FROM MOBILE AT Q7] when calling from your mobile phone?**

Very satisfied	1
Fairly satisfied	2
Neither satisfied nor dissatisfied	3
Fairly dissatisfied	4
Very dissatisfied	5
Don't know/can't remember	6

ASK ALL USE ANY 118 NATIONAL DQ SERVICES AT Q4 OR Q5. OTHERS GO TO Q16
 Q14. SHOWCARD OFH AGAIN **How satisfied are you overall with the services provided by the new 118 providers? SINGLE CODE ONLY**

Very satisfied	1
Fairly satisfied	2
Neither satisfied nor dissatisfied	3
Fairly dissatisfied	4
Very dissatisfied	5
Don't know/can't remember	6

ASK ALL USE ANY 118 NATIONAL DQ SERVICES AT Q4 OR Q5. OTHERS GO TO Q16
 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 ONLY**

118 better	1
Both about the same	2
118 worse	3
Never called 192	4
Don't know	5

USE OF ALTERNATIVE METHODS TO OBTAIN NUMBERS

ASK ALL

Q16. a) What sources of information did you use to find out any of the new directory enquiry numbers?

b) And which other sources do you think you will use to find out about them?

DO NOT READ OUT. CODE ALL THAT APPLY.

	(a) have used	(b) will use
No need to, know enough 118 numbers	1	1
Radio advertising	2	2
Television advertising	3	3
Press advertising	4	4
Posters in the street or elsewhere	5	5
Posters at underground stations/on underground trains	6	6
BT Phonebook	7	7
Yellow pages	8	8
Thomson directory	9	9
Other phone book	10	10
Press article	11	11
BT van/vehicle	12	12
BT Payphone	13	13
Other telephone / work telephone	14	14
Payphone – other/unspecified	15	15
Leaflet sent with BT phone book	16	16
Leaflet sent with BT phone bill	17	17
Call BT	18	18
Call my telephone company	19	19
Internet	20	20
Oftel leaflet	21	21
Ask family/friends/colleagues/ask around/word of mouth	22	22
Call operator/100	23	23
Call old number – they'll direct me	24	24
Wait for a leaflet/ information through the post	25	25
a) Other (WRITE IN AND CODE '26')	26	
b) Other (WRITE IN AND CODE '26')		26
Not likely to call directory enquiries	27	27
Don't know	28	28

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	1
About the same	2
Less frequently	3
Too early to say	4
Don't know	5

ASK ALL WHO CALL DIRECTORY ENQUIRIES MORE FREQUENTLY THAN THEY DID BEFORE THE OLD NUMBER WAS WITHDRAWN (CODE '1' AT Q17, OTHERS GO TO Q19)

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	1
To get the number emailed to me	2
To get the number texted to me	3
Store numbers sent by text in mobile	4
Because I know about the service / advertising	5
To get classified information (such as a taxi service or plumber)	6
To get cinema listings	7
To get train time information	8
To get directions	9
To find out what's on television	10
It's now cheaper/better value than it used to be	11
Better services offered (unspecified)	12
Other (WRITE IN AND CODE '13')	13
Don't know	14

ASK ALL WHO CALL DIRECTORY ENQUIRIES LESS FREQUENTLY THAN THEY DID BEFORE THE OLD NUMBER WAS WITHDRAWN [CODE 3 AT Q17, OTHERS GO TO Q20]
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	1
Did not realise there was a charge made for directory enquiries until the new numbers were introduced	2
The new services are too expensive	3
Have heard/read about poor service (but not used any of them myself)	4
Have received poor service and have not called again	5
Use internet (general) instead	6
Use internet directory enquiries instead	7
Store numbers sent by text in mobile	8
Operators/ agents not knowledgeable	9
Call centres/ operators/ agents situated overseas	10
Haven't needed to use it	11
Can't remember the numbers	12
Use other methods now (general mention)	13
Other (WRITE IN AND CODE '14')	14
Don't know	15

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? SINGLE CODE ONLY

	(a) (MC) Use	(b) (SC) Use most
Phone book/printed directory	1	1
Internet general	2	2
Internet directory enquiry	3	3
Friend/colleague/relative	4	4
Own records/address book	5	5
Mobile phone address book	6	6
Other (CODE '7' AND WRITE IN)	7	7
Have not needed any telephone numbers	8	8
Do not use directory enquiries	9	9
Don't know	10	10

ASK ALL WHO PICK A SINGLE MOST-USED METHOD AT Q20(B) CODES '1-7' OTHERS GO TO Q22

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

Very satisfied	1
Fairly satisfied	2
Neither satisfied nor dissatisfied	3
Fairly dissatisfied	4
Very dissatisfied	5
Don't know	6

COST OF 118 SERVICES

ASK ALL

Q22. SHOWCARD OFI **Which of the following statements best describes your understanding of the new 118 directory enquiries numbers? Just read out the number that applies.** READ OUT. SINGLE CODE ONLY

They charge the same price as each other and offer the same services	1
They charge a range of different prices and offer different services	2
They charge a range of different prices and all offer the same services	3
They all charge the same price as each other and offer different services	4
Don't know	5

ASK ALL WHO USE ONE LISTED NUMBER MOST OFTEN FROM FIXED AT Q6 OTHERS GO TO Q25

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 USED AT Q6] from your fixed-line phone at home?**

Cost	
£	<input type="text"/> . <input type="text"/> <input type="text"/>

Don't know	2
------------	---

ASK ALL WHO USE ONE LISTED NUMBER MOST OFTEN FROM MOBILE AT Q7. OTHERS GO TO Q27

- Q24. **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 Q7] from your mobile?**
RECORD VALUE AS OPEN NUMERIC ANSWER IN PENCE

Cost			
£	<input type="text"/>	.	<input type="text"/> <input type="text"/>

Don't know	2
------------	---

ASK ALL

- Q25. **Approximately how much do you think it costs to call the old 192 directory enquiries number from**

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

DO NOT READ OUT. SINGLE CODE.

RECORD VALUE AS OPEN NUMERIC ANSWER IN PENCE

Cost (a) fixed-line		Cost (b) mobile	
£	<input type="text"/>	.	<input type="text"/> <input type="text"/>
£	<input type="text"/>	.	<input type="text"/> <input type="text"/>

Don't know	2	Don't know	2
------------	---	------------	---

ASK ALL

- Q26. **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 STATEMENTS a) – e). ROTATE ORDER. TICK START (✓). SINGLE CODE ONLY

<input type="checkbox"/>	a) _____ 118 numbers are more expensive than 192	1
	b) _____ 118 numbers are cheaper than 192	2
<input type="checkbox"/>	c) _____ 118 numbers cost the same as 192	3
	d) Some 118 numbers are cheaper, some cost the same, and some are more expensive than 192	4
	Don't know	5

ADDED SERVICES

ASK ALL

Q27. SHOWCARD OFM **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.**

ASK ALL USED NEW DQ SERVICES AND AWARE OF ANY OF THE NEW SERVICES [Q4 OR Q5 AND CODES '1-12' AT Q27] OTHERS GO TO Q31

Q28. SHOWCARD OFM AGAIN **And for each of these, please tell me whether you have used the service?** REDUCED LIST OF ALL THOSE MENTIONED AT Q27

	Q27	Q28
Number sent by text to your mobile	1	1
Number emailed to you	2	2
Onward connection to the number requested	3	3
Request for more than one number	4	4
Classified searches such as requests for a taxi firm or electrician	5	5
Cinema listings	6	6
Television listings	7	7
Train times	8	8
Providers listing specialist gay services	9	9
Service provided in Welsh	10	10
None of these	11	11
Don't know	12	12
Q42 Other (WRITE IN AND CODE '13')	13	
Q43 Other (WRITE IN AND CODE '14')		14

ASK ALL
 Q29. SHOWCARD OFO **Please tell me for each of the following services, how likely you are to use them in the next 12 months.** READ OUT STATEMENTS a) – m). ROTATE ORDER. TICK START (✓). SINGLE CODE ONLY FOR EACH

		Certain to	Very likely	Fairly likely	Fairly unlikely	Very unlikely	Certain not to	No opinion
<input type="checkbox"/>	a) Standard UK directory enquiry: asking for a UK residential or business telephone number without any other service	1	2	3	4	5	6	7
	b) Number sent by text to your mobile	1	2	3	4	5	6	7
<input type="checkbox"/>	c) Number emailed to you	1	2	3	4	5	6	7
	d) Onward connection to the number requested	1	2	3	4	5	6	7
<input type="checkbox"/>	e) Requesting more than one number	1	2	3	4	5	6	7
	f) Classified searches for specific services such as requests for a taxi firm or electrician	1	2	3	4	5	6	7
<input type="checkbox"/>	g) Cinema listings	1	2	3	4	5	6	7
	h) Television listings	1	2	3	4	5	6	7
<input type="checkbox"/>	i) Train times	1	2	3	4	5	6	7
	j) Providers listing specialist gay services	1	2	3	4	5	6	7
	k) Service provided in Welsh	1	2	3	4	5	6	7

ASK ALL USE NATIONAL DQ SERVICES AND HAVE A MOBILE (CODE '1' AT TTI, AND CODES 1-6 AT Q1) OTHERS GO TO Q31

Q30. **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

Cost

£ .

RECORD VALUE AS OPEN NUMERIC ANSWER IN PENCE

Varies by 118 service	2
Standard text message charge	3
Don't know	4

ASK ALL USED CALL CONNECT (ONWARD CONNECTION TO THE NUMBER REQUESTED) CODE '3' AT Q28, OTHERS GO TO Q32

Q31. **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:**

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

SINGLE CODE FOR EACH

(a)
fixed-line
(b)
mobile

RECORD VALUE AS OPEN NUMERIC ANSWER IN PENCE

Cost (a) fixed-line	Cost (b) mobile
£ <input style="width: 30px;" type="text"/> . <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/>	£ <input style="width: 30px;" type="text"/> . <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/>

Varies by 118 service	2	2
Standard cost of call to the number requested	3	3
Cost of local call	4	4
Cost of national call	5	5
Don't know	6	6

ASK ALL USE DQ SERVICES AT Q4 OR Q5. OTHERS GO TO Q33

Q32. SHOWCARD OFO AGAIN **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	1
Very likely	2
Fairly likely	3
Fairly unlikely	4
Very unlikely	5
Certain not to	6
Don't know	7

ASK ALL

Q33. **If you were looking for advice or information on the costs of different 118 directory enquiry services where would you turn to for trusted information?**

Family members	1
Friends	2
Colleagues	3
Magazines / newspapers	4
TV/Radio programmes/advertising	5
Supplier already using for the service	6
Another supplier not already using	7
Leaflets in stores/post	8
Websites of suppliers/service providers	9
Cost comparisons websites	10
Internet in general	11
Visit shop/store selling technology/device	12
Government body/regulator	13
Other (please specify and code 14)	14
Don't know	15

ASK ALL USE DQ SERVICES AT Q4 OR Q5. OTHERS GO TO Q35

Q34. **SHOWCARD OFQ 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 a) – e). ROTATE ORDER. TICK START (✓). SINGLE CODE ONLY FOR EACH

		Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	No opinion
<input type="checkbox"/>	a) The extra services offered by some of the new directory enquiries providers are, or will be, really useful to me	1	2	3	4	5	6
	b) 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	1	2	3	4	5	6
<input type="checkbox"/>	c) Competition between the different directory enquiry services will lead to an improvement in the quality of the services they provide	1	2	3	4	5	6
	d) I find the current level of choice in the 118 directory enquiry market confusing	1	2	3	4	5	6
<input type="checkbox"/>	e) Competition between the different directory enquiry services will lead to the costs of these services coming down	1	2	3	4	5	6

ASK ALL WHO USE DQ SERVICES [Q4-5]
 Q35. If a 118 directory enquiry provider does not provide the number you request or provides you with an incorrect number, when the correct number should have been given, they must refund you the cost of the original call and any other calls you need to make to get your refund. Before now, were you aware of this?

Yes	1
No	2
Don't know/ Not stated	3

ASK ALL WHO USE DQ SERVICES [Q4-5]
 Q36. SHOWCARD OFR Taking your answer from this card, please tell me how likely you would be to try to get a refund of the cost of your original call if you received an incorrect number or no number was given by a 118 directory enquiry provider...
 IF HAS ONLY FIXED-LINE (TT1 DOESN'T CODE 1) OR USES MAINLY FIXED-LINE TO CALL DQ (Q2 CODES 1), ADD **when calling from your landline.**
 IF HAS ONLY MOBILE (TT2 DOESN'T CODE 1-2) OR USES MAINLY MOBILE TO CALL DQ (Q2 CODES 2), ADD **when calling from your mobile.**
 IF HAS BOTH AND DOESN'T USE MAINLY EITHER (ROUTES TO Q2 BUT CODES 3-4), DO NOT ADD ANYTHING.
 SINGLE CODE

I have already tried to get a refund	1
Certain to	2
Very likely	3
Fairly likely	4
Fairly unlikely	5
Very unlikely	6
Certain not to	7
Don't know/ Not stated	8

ASKED OF ALL
 QA. SHOWCARD OFA Which of these, if any, do you personally use...? and which others?
 MULTICODE OK

Mobile phone	1
Text messaging (SMS) on a mobile phone	2
Picture messaging (MMS) on a mobile phone	3
PC - desktop, laptop or other computer at home	4
PC - desktop, laptop or other computer at work, place of study or elsewhere	5
Internet at home	6
Internet at work, place of study or elsewhere	7
Internet at home via a high-speed, always-on 'broadband' connection (e.g. via ADSL or cable modem)	8
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)	9
Interactive services on digital TV (e.g. games, shopping, banking or extra information accessed by pressing the 'red button' on your remote control)	0
DVD player (built into a computer or stand alone)	X
Digital radio channels through a specialist DAB receiver,	Y

through a digital television or over the internet	
	()
None of these	1
Don't know	2

ASKED OF ALL

QB. **Do you have a landline telephone in your home?** INTERVIEWER NOTE IF SOMEONE HAS A MOBILE BUT NOT A LANDLINE, CODE 'NO'
PLEASE TICK ONE BOX ONLY

Yes, have a landline telephone	1
Yes, but ex directory	2
No	3
Refused	4