



Non-Geographic Call Services Review

Research Document

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Section 1

Introduction

1.1 Background and objectives:

Ofcom is undertaking a strategic review of non-geographic callservices(NGCS) and commissioned research to support this.

The overall aims of the research were to:

- gain a better understanding of consumers' awareness, understanding, use and perception of non-geographic numbers – among both fixed-line and mobile users; and
- assess whether NGCS have any impact on consumers' decision-making and calling behaviour.

Specifically, the research addressed the following areas:

- Consumers' awareness, understanding and perception of non-geographic numbers (including associated services, and relative prices for fixed-line and mobile).
- Use of non-geographic numbers, and awareness and use of alternatives.
- Relative importance of non-geographic calls in selecting a provider, and awareness of information provided by operators.
- Perceived importance of non-geographic numbers and whether consumers need access to all these numbers from either fixed lines or mobiles.
- Consumers' response to the standardisation of price ranges across all providers, and to offsetting the costs of non-geographic against geographic calls.

1.2 Method and sampling:

The research was conducted in two simultaneous phases:

Qualitative phase:

Ten small focus groups; two from each user group:

- Fixed-line only (2)
- Fixed-line and PAYG mobile (2)
- Fixed-line and contract mobile (2)
- PAYG mobile-only (2)
- Contract mobile-only (2)

Quantitative phase:

Face-to-face survey with a nationally representative sample of UK consumers, covering all user groups (total sample n=1,189). See Annex for sample breakdown.

In addition to ensuring minimum quotas for the different user groups (fixed-line only, mobile-only, etc), we set quotas to enable us to look at any differences between:

BT and non-BT customers:

- The aim was to understand whether BT customers were aware of the inclusive 08xx numbers in their package and whether this had made any difference to their choice of BT as a provider.

Consumers who had switched or considered switching in the past 12 months and those who had not:

- The aim was to understand whether fixed or mobile customers had received any information about 08xx/09xx numbers during the switching process and whether this had had any impact and/or affected their choice of provider.

We also looked at whether those on a low income (personal income of less than £10k per annum) responded differently to other groups. This segment correlated very closely with the mobile-only PAYG segment – 64% of those on a low income were mobile-only PAYG – so the results relating to low-income users can be considered in terms of mobile-only PAYG users.

Overall, the results turned out to be very consistent across the sample, with very few significant differences in response between any of the user and demographic groups. Where there were differences, these have been illustrated in the charts and / or commented on.

Mobile-only users were a particular focus of this project, as we anticipated that NGCS might affect these users more than others. We have therefore broken out the results from the mobile-only segment in some charts, and provided commentary where appropriate.

Section 2

Executive summary

Calls to non-geographic numbers did not appear to be 'front of mind' for most consumers in the focus groups, with several commenting that they had never considered these numbers before being prompted in the discussion.

There appeared to be a number of reasons for consumers' lack of engagement with NGCS:

- The majority of consumers considered that they called these numbers rarely (i.e. less than once a month).
- Charging for paper billing had meant very few consumers received an itemised breakdown of their calls and charges, so visibility of their call activity was greatly reduced.
- Most consumers were also signed up to a bundle of services, and they would simply look at the monthly total without considering the individual elements of the bill. If this total was within the usual range (and generally it was), then that was enough detail for them.

However, the quantitative results suggested that a minority of consumers did consider these numbers. Eleven per cent of fixed-line users and 9% of mobile users, unprompted, thought that the cost of calls to these numbers was important when considering a new provider. Those who did not mention the cost of calling these numbers said this was either because they did not call them regularly (both fixed and mobile users) or because they had been conditioned not to call them from their mobile due to the perceived expense.

There was some consumer awareness of communications activity from fixed-line providers about these numbers - 29% of fixed-line users who had switched, or considered switching, in the past twelve months had received information about 08/09 numbers, and a significant minority thought this had affected their choice of provider.

Just 11% of mobile users had received such information when choosing a new provider, suggesting that there is much less communication from mobile providers about these numbers. While a few mobile users would have liked to have received information, most were not interested and did not feel it would have made any difference to their choice of provider.

Overall, consumers said they did not call non-geographic numbers very often. Fixed-line users said they called 0800 and 0845/0870 numbers most frequently, but the majority said they called 08/09 numbers rarely or never. Mobile users said they called these numbers even less frequently. Well over 80% of mobile-only users called these numbers rarely or never.

The reasons for not calling these numbers more regularly were that consumers saw no need to call them; mobile-only users, in particular, considered them expensive. PAYG mobile-only users spoke of their credit disappearing in front of their eyes, and said they would go to some lengths to avoid using their own phone and to find alternatives to calling from their mobile.

Attitudes towards these numbers were overwhelmingly negative, across all users. Consumers disliked having to pay for calls that fell outside their inclusive minutes, and felt the only rationale for the numbers was to make money for the organisations that owned them. The numbers that consumers called regularly were services such as banks and utilities.

About a third of fixed and mobile users felt that they were forced to call these numbers. This feeling, combined with the perception that the calls were expensive, led consumers to think that they were deliberately being taken advantage of, especially when they were made to hang on before the call was answered. Many felt that it was improper for public services such as the NHS or their doctor to be making money in this way.

There was a widespread belief that calls to these numbers were more expensive from a mobile than from a fixed line, and those with a fixed line would always use the fixed line rather than a mobile to call these numbers. However, consumers' confidence in their estimates of the cost of making these calls, either from a fixed line or a mobile, was very low and, most strikingly, even fixed-line users were uncertain about the cost of call charges to 0800 numbers (only 46% of consumers were confident that 0800 numbers were free from fixed lines). Mobile users thought that calling non-geographic numbers was expensive and that the cost varied considerably across different networks.

Consumers were unsure about the concept of 'limited access' to some numbers in the 08/09 ranges. For some, the idea of restricted access was counter-intuitive and would put them off that provider; for others, restricted access would be acceptable so long as it was clear which numbers were restricted and there was some additional benefit.

Offsetting the costs of calls to 0800 and other 08/09 numbers was generally rejected, primarily because consumers could not see any benefit to them – they were still paying for calls they already considered expensive, just in a different way. Neither did they feel that the current frequency of their calls to these numbers warranted a change in the payment structure. A standard price range across networks was more popular, as this would provide some transparency, and therefore reassurance, about the provider.

Overall, the evidence suggests that non-geographic numbers are having an impact on mobile-only users and, in particular, forcing PAYG users to make alternative arrangements when calling these numbers. But the vast majority of consumers, with a fixed line only, or a fixed line and a mobile, do not currently pay much attention to these numbers, due to their low reported use of these numbers, and roughly consistent monthly billing.

Section 3

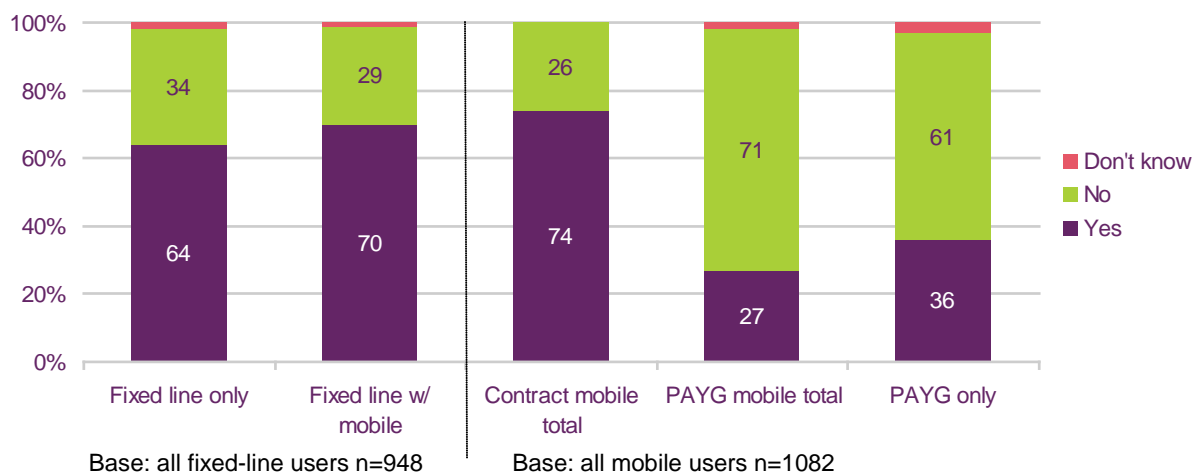
Main findings

3.1 Initial qualitative observations

- In the qualitative groups, engagement with NGCS was low. Several in the groups spontaneously mentioned that they had never given these numbers any consideration before coming to the groups.
- There appeared to be a number of reasons for consumers' lack of engagement with NGCS:
 - The majority of consumers said that they called these numbers rarely (i.e. less than once a month).
 - To avoid charges for paper billing, very few consumers received an itemised breakdown of their calls and charges, so visibility of their call activity was greatly reduced.
 - Most consumers were also signed up to a bundle of services and would simply look at a monthly total without considering the individual elements of their bill. If the bill was within the usual range (and generally it was), that was enough detail for them.
- As a result, the vast majority of consumers found it difficult to engage with NGCS and therefore did not consider them to be 'front of mind'.
- All but the most cost-conscious consumers tended to overlook non-geographic calls until they were asked for their opinions. This should be taken into consideration when reviewing the results.

3.2 Consumers signed up to a call plan

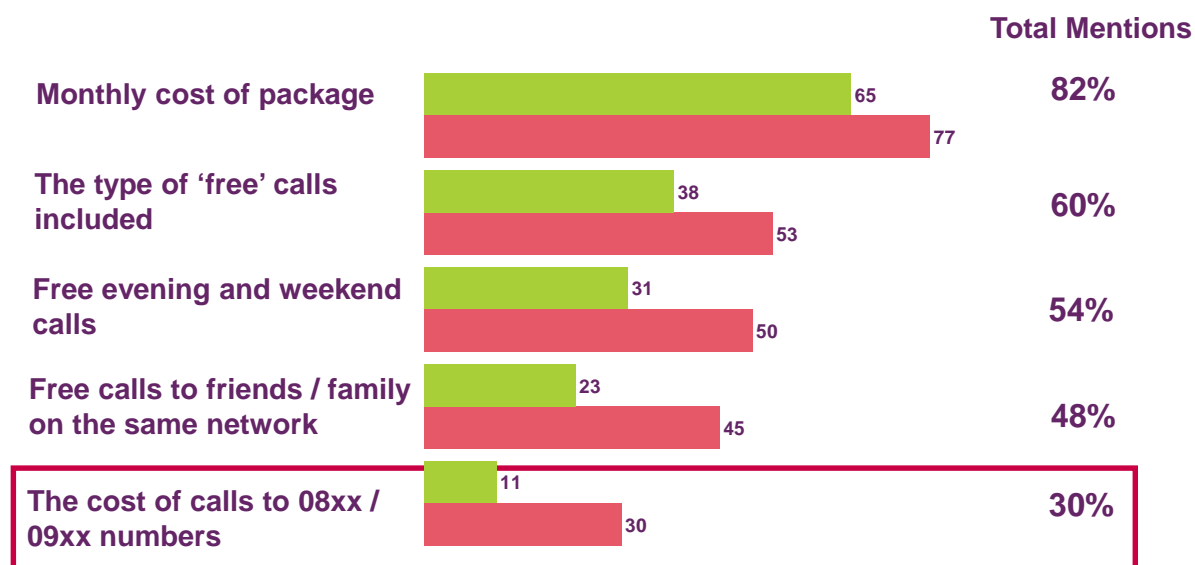
Q3/4. Are you signed up to a calling plan or special deal on your landline / mobile (for example calls to certain numbers at certain times are inclusive or cheaper rates for same network, etc.)?



- The number of fixed-line and contract mobile users who thought they were signed up to a calling plan was surprisingly low, given that calling plans now appear to be standard from both fixed and contract mobile providers. Contract mobile customers usually benefit from inclusive minutes, as do many pay-as-you-go (PAYG) mobile packages.
- It is possible that participants may have had a different understanding of 'calling plan'; so these results should be treated with caution.
- More PAYG mobile-only users thought they were signed up to a call plan or a special deal than those with a fixed line and a PAYG mobile. This correlated with the groups, in which PAYG-only users tended to be much more aware of the available offers than were fixed-line and PAYG mobile users, who tended to use their mobile infrequently.
- Overall, these results were slightly at odds with the findings from the groups, in which all mobile contract and fixed-line users thought they were signed up to a call plan and were aware of what was contained in their package. For most, calls to geographic numbers were included in these packages or call plans.

3.3 Important elements when choosing a fixed-line provider

Q5/7. If you were considering switching your landline supplier, what elements would be important when choosing a new supplier?



Base: All fixed line users n=948

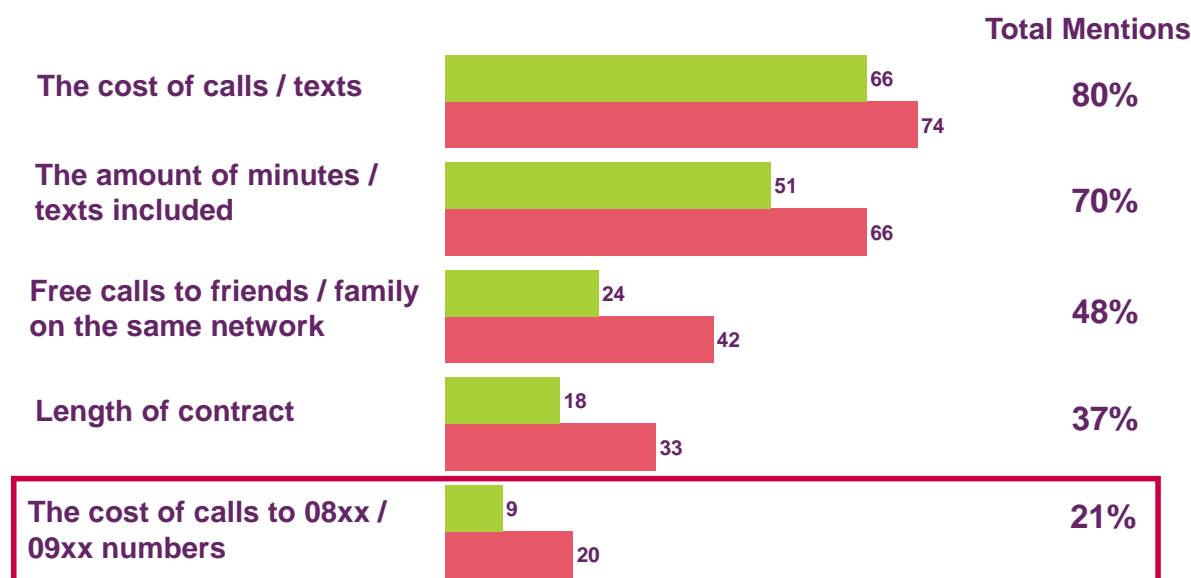
■ Spontaneous ■ Prompted

- Unsurprisingly, the cost of the package and the inclusive calls were the most important elements when considering a new supplier – both at a spontaneous and prompted level.
- Notably, 11% of fixed-line users spontaneously mentioned the costs of calls to 08xx / 09xx numbers (the eighth most popular response), and a further 30% mentioned it when prompted (the sixth most popular response). Overall, 30% mentioned these numbers as being important when considering a new fixed-line provider (the sixth most popular response).

- These results were roughly in line with the overall findings from the groups – although more people considered these numbers when prompted in the groups
 - “I don’t ring them much but more and more companies are using them – I had to ring the travel agent the other day and they had one of these numbers. So if we’re going to be using these more and more, then they will become a consideration” (fixed line / mobile contract user)

3.4 Important elements when choosing a mobile provider

Q6/9. If you were considering switching your mobile supplier, what elements would be important when choosing a new supplier?



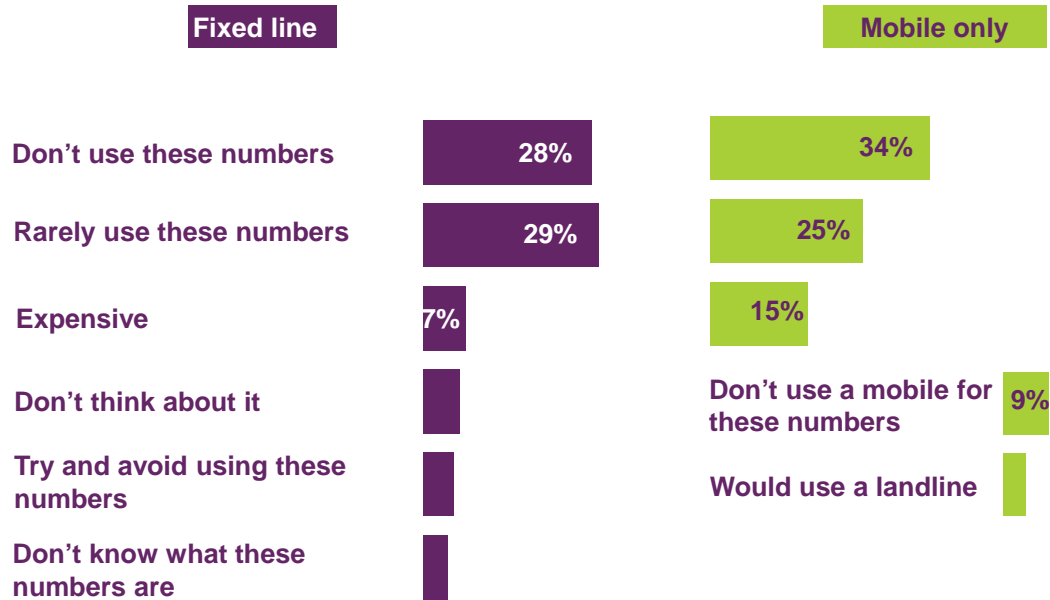
Base: All mobile users n=1082

■ Spontaneous ■ Prompted

- Overall, the most important elements were the cost of calls/texts and how many minutes and texts were included in a bundle.
- Nine percent of respondents mentioned the cost of calls to 08/09 numbers spontaneously (the eighth most popular response) and 20% when prompted (the seventh most popular answer).
- Mobile users mentioned non-geographic calls less than fixed-line users – 21% compared with 30%. Thirteen per cent of mobile-only PAYG users mentioned them as being important when choosing a supplier.
- These results were somewhat higher than the qualitative findings – just two mobile users spontaneously mentioned non-geographic calls as being important when considering a supplier, although numbers increased when prompted.

3.5 Reasons for not mentioning the costs of calls to 08xx/09xx numbers

Q8/10. You did not mention the cost of calls to 08/09 numbers when choosing a fixed line / mobile provider, why was this? (open ended response)



Base: All fixed line users who did not mention the cost of calls at Q5/7: n=662 Base: All mobile only users who did not mention the cost of calls at Q5/7: n=200

- For all users, low overall use was the main reason for not mentioning the cost of these calls:
 - *“To be honest, it’s only the bank and the doctor and I don’t call them that often” (fixed, PAYG mobile).*
- There was a slight difference between PAYG and contract mobile-only users. Contract mobile-only users tended to be slightly less definitive about not using these numbers:
 - 38% of mobile-only PAYG users do not use these numbers, compared with 30% of contract mobile-only;
 - 28% of contract mobile users rarely use these numbers compared with 22% of PAYG mobile-only users.

3.6 Information about 08/09 calls when switching – fixed line

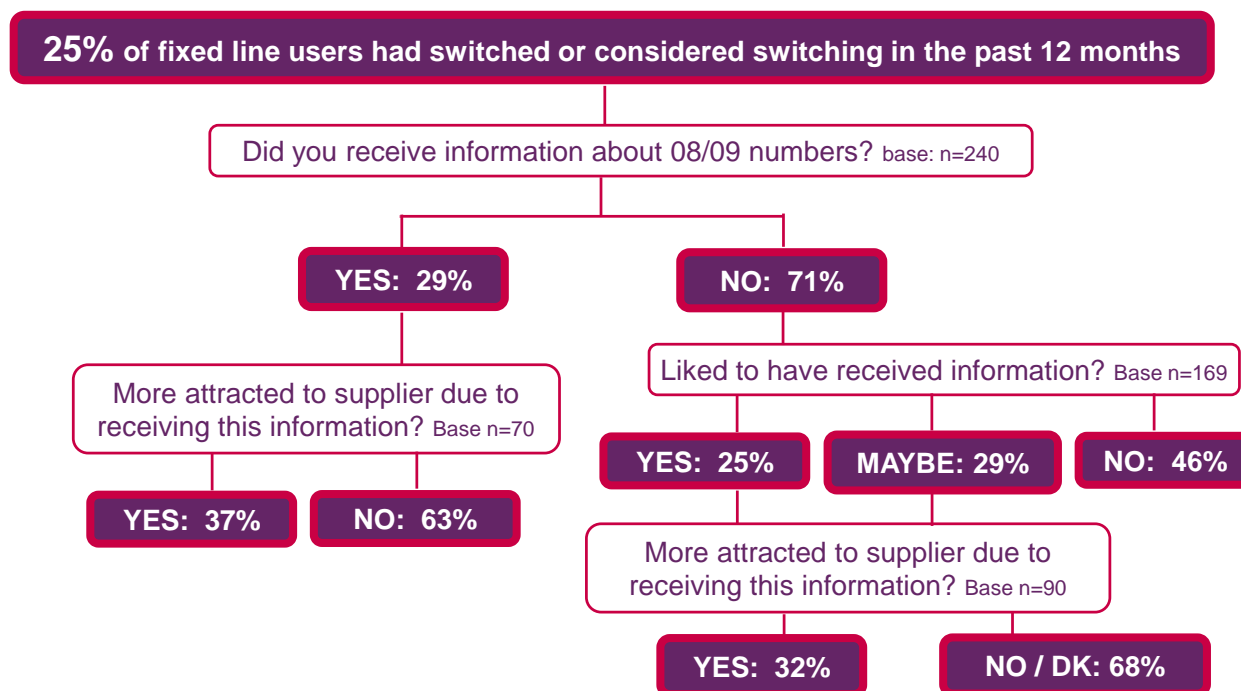
Q11. Have you switched, or considered switching your fixed-line provider in the past 12 months?

Q12. If yes, did you receive any information about 08/09 numbers from the landline provider?

Q13. Did receiving this information make any difference to your choice of provider?

Q14. If no, would you like to have received information about 08/09 calls?

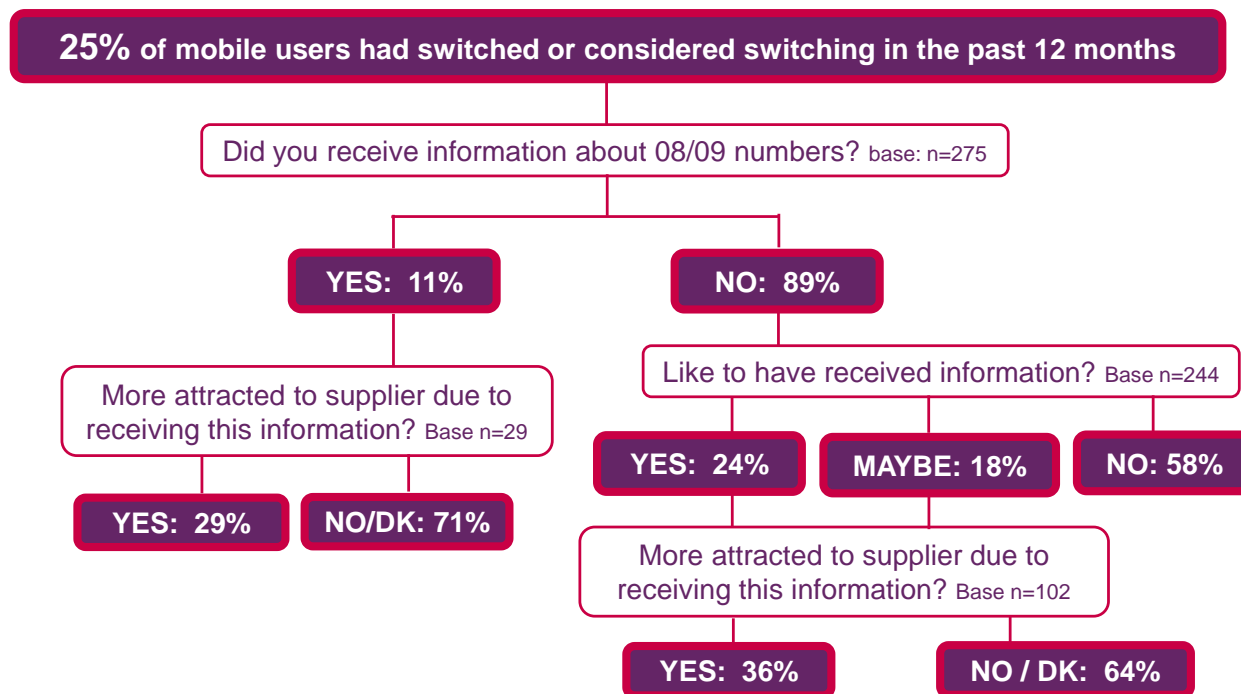
Q15. If you had received information about 08/09 numbers, would this have made any difference to your choice of supplier?



- Twenty-nine per cent of those who had switched or had considered switching had received information about 08/09 numbers, suggesting there has been some communications activity from fixed-line providers about these numbers.
- The majority of those who had received this information felt that it had made no difference to their choice of supplier, although a significant minority – 37% – thought that it had.
- Of the 71% who had not received any information, over half would have liked to have received information, but only a third of these thought it would have made any difference to their choice of supplier.
- While awareness of information about these numbers among those who had switched or considered switching was much more limited in the groups, several thought this information might have made a difference to their choice of supplier:
 - *“At the moment we don’t use them much, but there seems to be more of them and so it might have made a difference if I’d read something” (Fixed contract mobile user).*

3.7 Information about 08/09 calls when switching – mobile

- Q16. Have you switched or considered switching your mobile provider in the past 12 months?
 Q17. Did you receive any information about 08/09 numbers from the mobile provider?
 Q18. If yes, did receiving this information make any difference to your choice of provider?
 Q19. If not, would you like to have received information about 08/09 calls?
 Q20. If you had received information about 08/09 numbers, would this have made any difference to your choice of supplier?

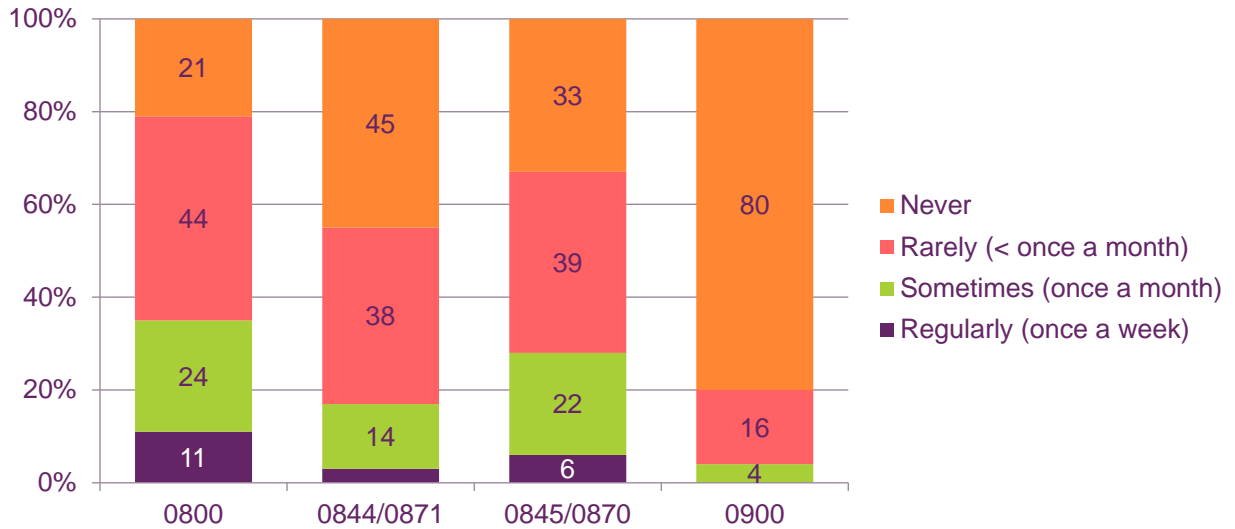


- Mobile providers appear to have been less active than fixed-line providers in communicating about these numbers – 11% of those who had switched or considered switching had received information about 08/09 numbers.
- The number of contract mobile users who had received information was higher than average – 14% compared to 11%. The figures were too small to allow us to draw any conclusions about whether those who had received this information felt it had made any difference to their choice of supplier.
- Among the vast majority who had not received any information, 42% said they might or would be interested in receiving information, with a third of these saying it would affect their choice of supplier:
 - *“I’m training to be a plumber and I have to ring up these numbers quite frequently – builders’ merchants often use them. So information like this would make a difference as it shows some transparency, which is a good thing” (contract mobile-only).*
- But most mobile users, including mobile-only users, were not particularly interested in receiving this information, nor would it have affected their choice of supplier:

- "I don't think about these numbers – in relation to all the other calls and texts, they don't feature" (contract mobile, fixed line).

3.8 Call frequency – home fixed line

Q21. How often do you make calls to the following numbers from your own landline?

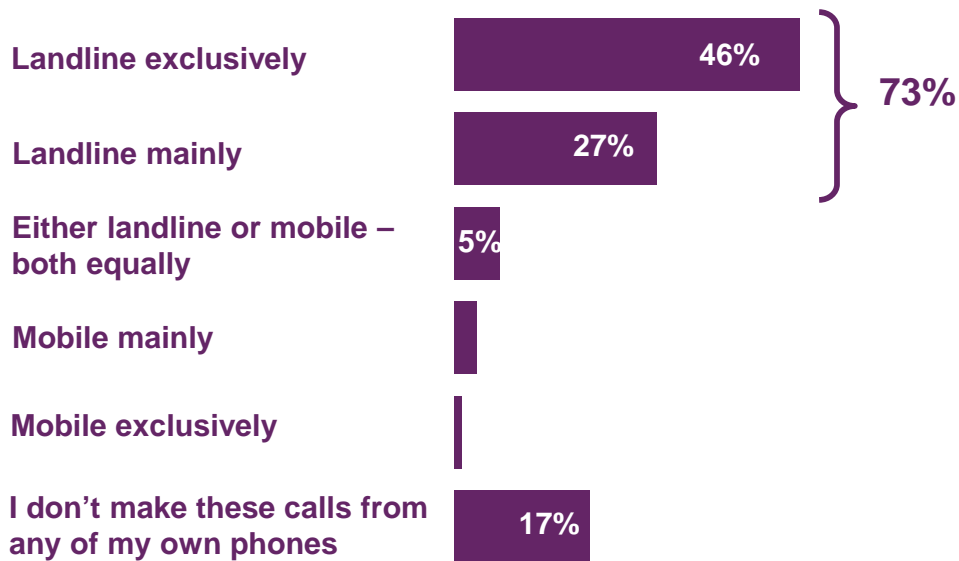


Base: All fixed line users n=948

- About a third of fixed-line users said they would call 0800 numbers sometimes or regularly from their home fixed line, with usage numbers decreasing for 0845/0870 and 0844/0871 numbers and with relatively low use of 09xx numbers from home fixed lines.

3.9 Home landline or mobile when calling 08xx / 09xx numbers

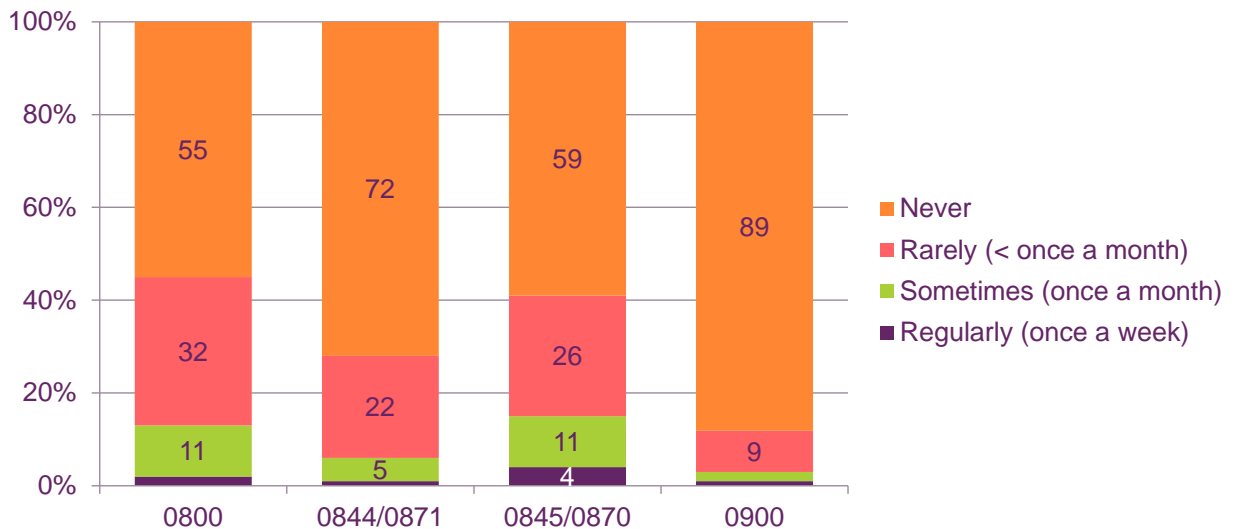
Q29. When making calls to 08 or 09 numbers, do you tend to use your landline or mobile or both?



Base: All fixed and mobile users n=841

- In keeping with the qualitative findings, the vast majority of fixed-line users who also have a mobile would use the fixed line for these calls.

Q25. How often do you make calls to the following numbers from your own mobile?

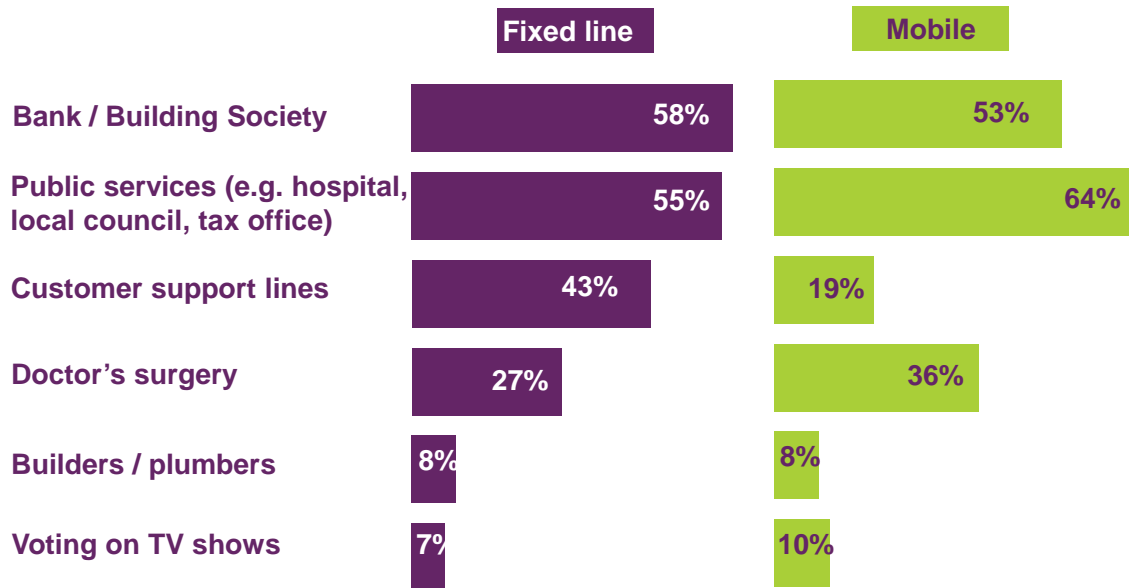


Base: All mobile only users n=241

- To understand usage amongst mobile users, we excluded those who also have a fixed line because we know that their usage of mobiles is almost zero (see previous chart).
- Use among mobile-only audiences is low – over 50% of mobile-only users never call 0800 numbers and non-use increases for other number ranges.

3.10 Services represented by calls to 08xx / 09xx numbers

Q22/26. What services do these numbers that you call sometimes or regularly represent?



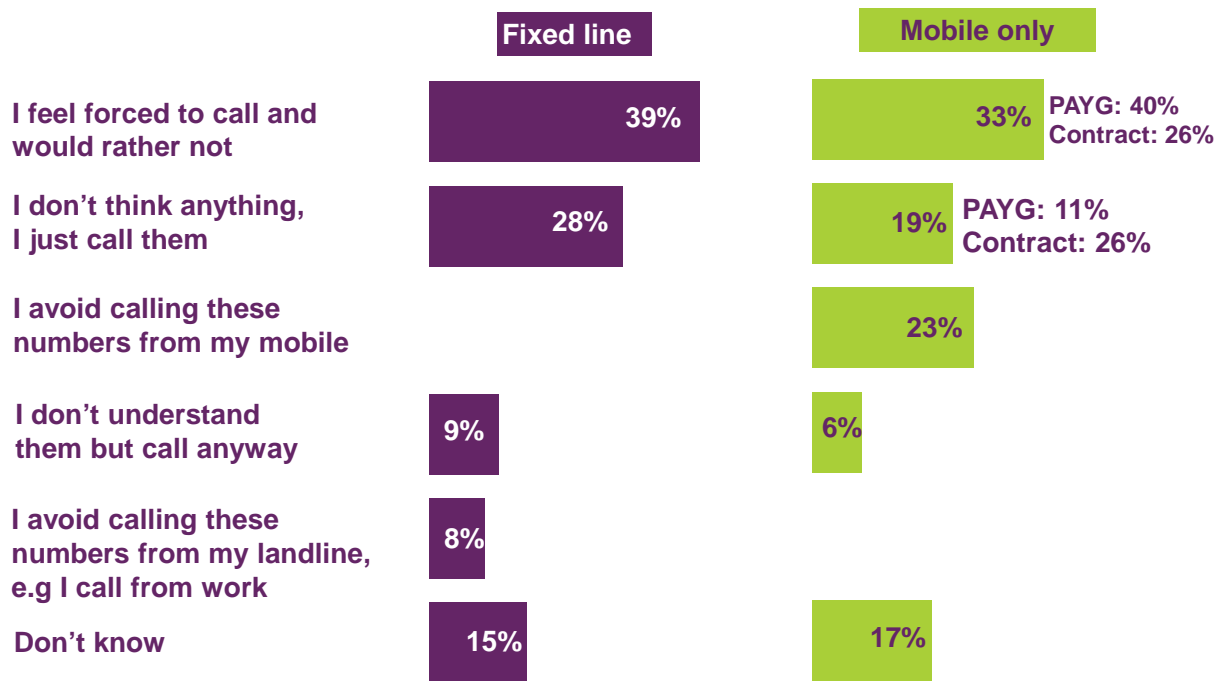
Base: All fixed line users who call these numbers regularly / sometimes at Q21 n=399

Base: All mobile users who call any of these numbers regularly / sometimes at Q25 n=113

- Note the higher use of public services by mobile-only users, in particular mobile-only PAYG – 68% compared with 56% of mobile contract users. But sample sizes are very small for the mobile-only segment.

3.11 Attitudes towards calling 08xx / 09xx numbers

Q24/28. How do you feel when you call these non-geographic numbers from a landline / mobile?



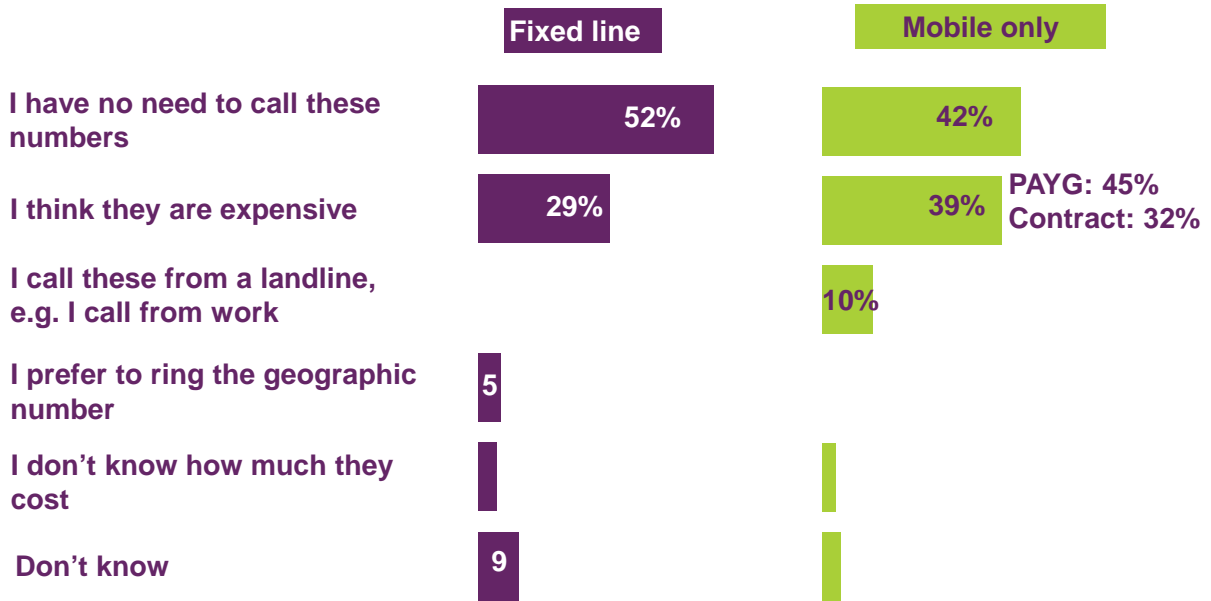
Base: All fixed line users except those who never call any of these numbers at Q21 n=783
 Base: All mobile only users except those who never call any of these numbers at Q25 n=118

- Overall, about a third of all users feel forced to call these numbers and would rather not – with even higher numbers among the PAYG mobile-only segment.
- About one in four mobile-only users avoid calling these numbers from a mobile. It should be noted that the above charts exclude those mobile-only users who **never** make these calls, i.e. just over 50% of mobile-only users. If we combine these results, roughly 65% of mobile-only users avoid calling or never call these non-geographic numbers.
- Expense was the main reason, and many PAYG-only users gave examples of seeing their credit disappear very quickly when making these calls:
 - *“I’ve called my bank a few times and had to wait to be put through – it cost me about a fiver for about a 3 minute call, I could literally see the credit disappearing as I was holding on” (PAYG mobile-only).*
- Mobile-only users, in particular those on PAYG, take steps to avoid calling these numbers from their own mobile. These included calling from work, from a friend’s or relative’s landline, even making visits to a phone box. Finding alternatives appeared to be the established norm, among PAYG mobile-only users in particular.
 - *“I sometimes got round to my mum’s to make these calls or sometimes from work – I never call from my own phone unless it’s an absolute emergency” (PAYG mobile-only user).*
- Contract mobile-only users appeared to be somewhat more carefree than PAYG users – 26% would just make the call and not think about it. This fitted with the qualitative findings:
 - *“To be honest I’ve always just called the number and never thought about it – if I’ve got to call the bank, then I’ll do it. I haven’t given it much thought until now but I have noticed my bills creeping up and maybe this is why.” (Contract mobile-only user)*

- Overall, non-geographic numbers were widely disliked. The key irritation for almost everyone in the groups was having to pay for a call that would otherwise be included in their calling plan or package.
 - *“I’m on a package that allows me to call any fixed-line number at any time of day or night and it is included in my monthly deal. But these numbers aren’t included and so I’m paying on top, which just seems ridiculous.” (fixed-line only)*
 - *“Even on PAYG you can still get deals on calls to fixed-line numbers, but these numbers are never included. I think it’s unfair that we get penalised so heavily on these calls and I have to find other ways of calling them.” (PAYG mobile-only)*
- Making money was felt to be the reason for businesses using these numbers, although the actual revenue-sharing concept was generally not particularly well understood. Interestingly, the organisation that owned the number was seen as the culprit, rather than the operators:
 - *“I’m not sure how it works but I think companies using these numbers do get some money when people call them – which is outrageous really if I’m calling the NHS or social services.” (Fixed-contract mobile user)*
- Several commented on the increasing use of these numbers by companies and organisations. Public services, in particular, came in for widespread criticism; people felt that these calls should be free:
 - *“It’s ridiculous that we should be paying to ring the NHS or the tax man. My doctor has just moved to one of these numbers and so I don’t call them now. I walk round the corner to the surgery rather than wasting money.” (PAYG mobile-only)*
- And almost everyone complained that they were often made to hang on for ages, thereby increasing their costs:
 - *“This is where it really feels like we’re being scammed. You call up your bank to make a complaint or ring a company to place an order and you’re put on hold for 10 minutes and all the while they’re making money out of you. It’s infuriating and I don’t understand why companies want to annoy people so much.” (Fixed-line and PAYG mobile user)*

3.12 Reasons for not calling 08xx / 09xx numbers more frequently

Q23/27. Why do you not call these numbers more frequently than 'rarely or never' from your own phone?

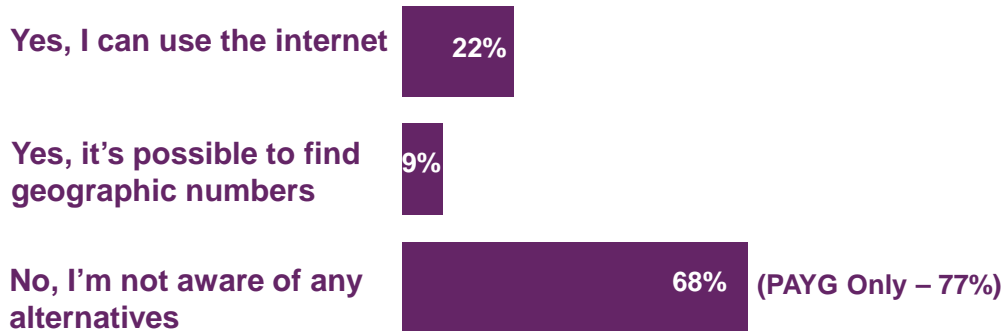


Base: All fixed line users and rarely / never call any numbers at Q21 n=919
 Base: All mobile only users and rarely / never call any numbers at Q25 n=237

- Most consumers saw no reason for calling these numbers. For those who did, cost and perceived expense, particularly among the mobile-only PAYG users, were the reasons for not calling more frequently.

3.13 Awareness of calling alternatives to 08xx / 09xx numbers

Q30. Are you aware of any alternatives to having to call 08/09 numbers. If so, what are the alternatives?



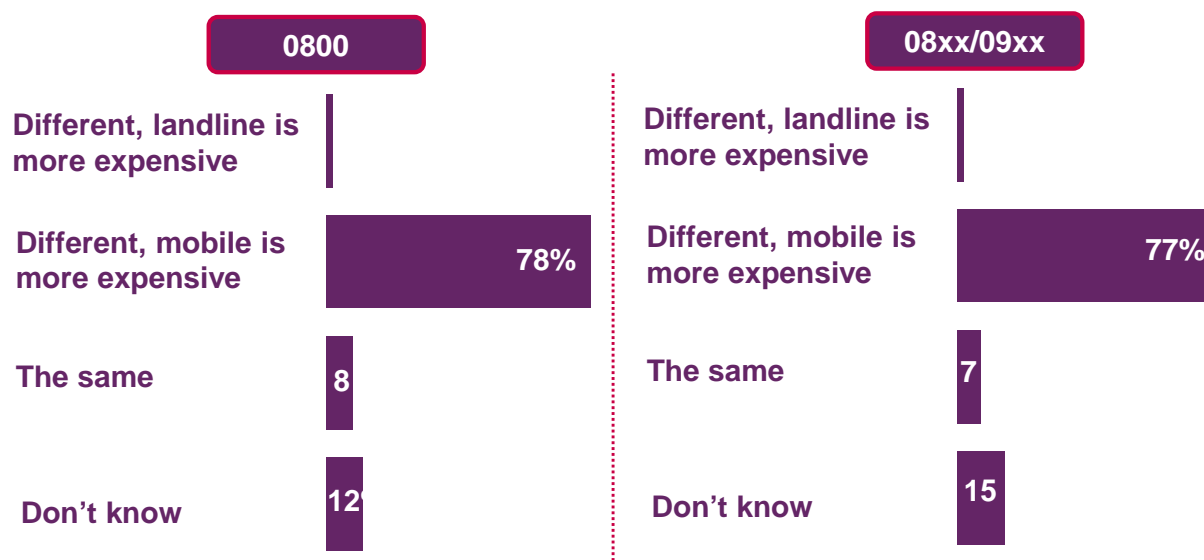
Base: All n=1189

- The majority was not aware of any alternatives, but a significant minority – 31% – were. The most-mentioned alternative was to use the Internet. This correlated with the groups, in which some of the most cost-conscious had moved to using email and a few had come across websites such as ‘Saynoto0870.com’.

3.14 Perceived cost differences: fixed-line and mobile

Q33. Thinking about 0800 numbers, do you think the cost of calling an 0800 number from a landline is different or the same to calling an 0800 from a mobile?

Q34. Leaving aside 0800 numbers, do you think the costs of calling numbers starting with 08 or 09 are different when calling from a landline to calling from a mobile?

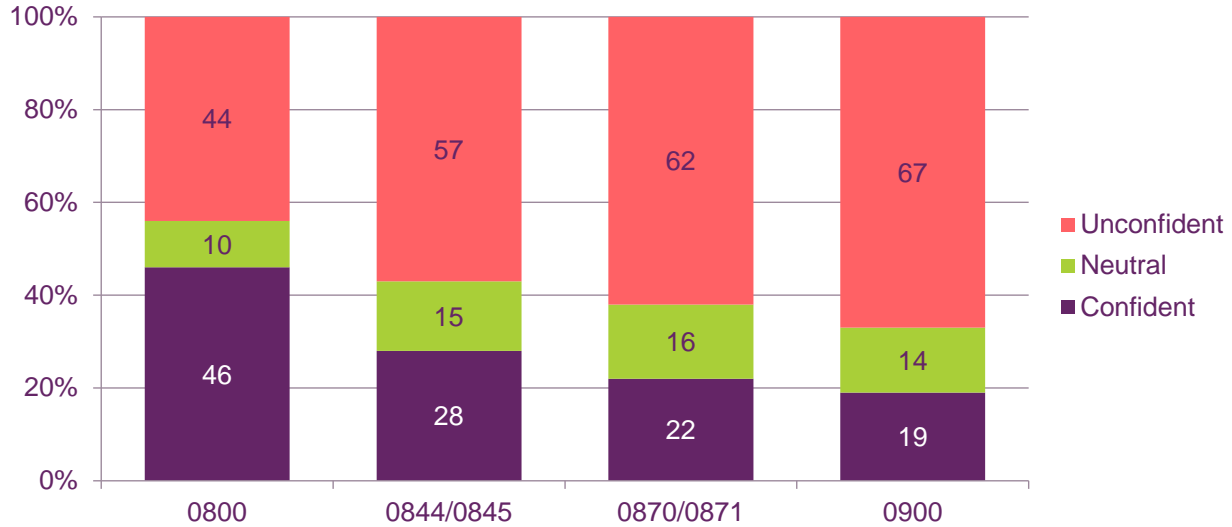


Base: All who use a fixed line and mobile n=841

- There is a widespread understanding that mobiles are more expensive than fixed lines.
- When participants in the groups were asked where this knowledge came from,
 - most fixed-line users thought it was a legacy of the past, when mobile calls were generally more expensive than fixed-line;
 - a few said that they had learnt it from hearing a message such as “The call will cost XX pence from a fixed line and considerably more from a mobile”;
 - Most PAYG mobile-only users said they knew of the cost difference first-hand;
 - “Once you’ve called these numbers from your mobile and seen your credit disappear, you realise pretty quickly that it’s cheaper from a fixed line.”

3.15 Confidence in call costs to 08xx / 09xx numbers

Q35. How confident are you that you know the costs of calls per minute to these numbers from a fixed line?



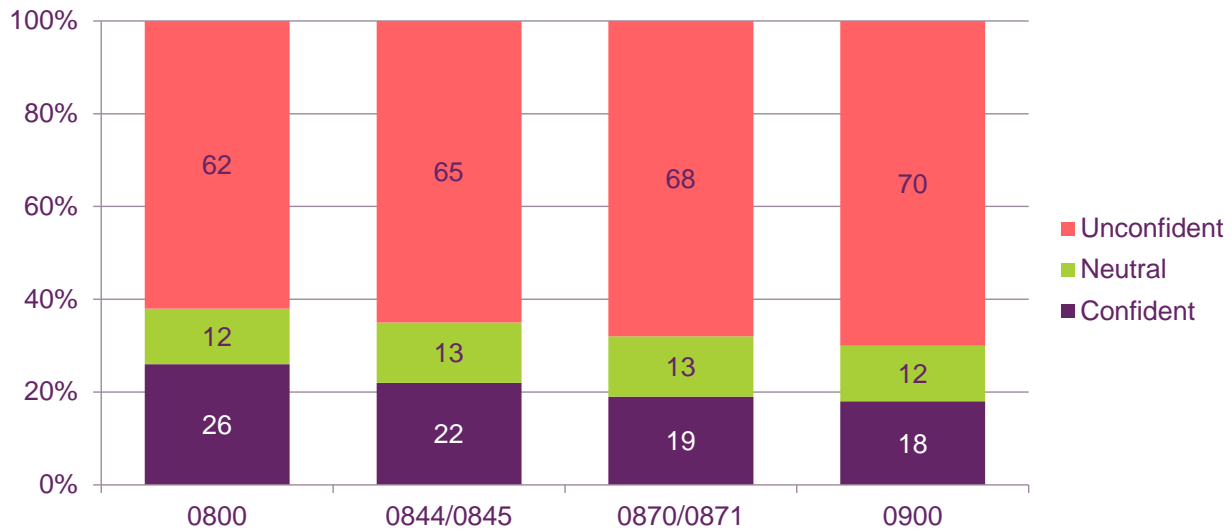
Base: All fixed line users n=948

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- Surprisingly, confidence levels in knowing the cost of calls to 0800 numbers from a fixed line were low – almost everyone in the groups had been confident that this number was free. Confidence in knowing the cost of calls to numbers other than 0800 was markedly lower.
- Lack of confidence in knowing the costs of calls to other 08/09 numbers was in keeping with similar research on call costs two years ago¹.

Q36. How confident are you that you know the costs of calls per minute to these numbers from a mobile?

¹Consumer transparency in telephone numbering research, February 2009: <http://stakeholders.ofcom.org.uk/binaries/consultations/wmctr/annexes/transparency.pdf>



Base: All mobile users n=1082

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- Lack of confidence in the costs of calling these numbers from a mobile was even more widespread.
- In the groups, most people thought that these numbers were at premium rates when called from a mobile and that prices would vary considerably across different networks.

3.16 Confidence in call costs to 08xx / 09xx numbers that are called regularly

Q37. Thinking back to any 08/09 numbers that you call regularly, do you feel more confident of the cost of these numbers than 08/09 numbers you don't call regularly?



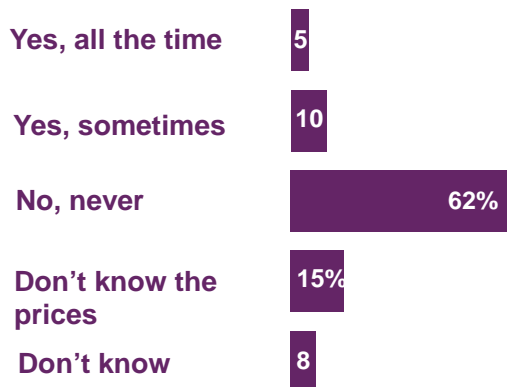
Base: All n=1189

- In keeping with previous results, most did not call these numbers regularly and / or were unsure of the costs of calls to any of these numbers.

- Even where respondents called these numbers regularly, only a minority reported feeling more confident about the cost of calls. This is consistent with findings from the groups, where few consumers received an itemised breakdown of their calls and many looked at the headline cost alone without considering the individual elements of the bill.

3.17 Frequency of shopping around

Q38. When calling these sorts of services, do you shop around and decide which person or service to call based on the price of a call?



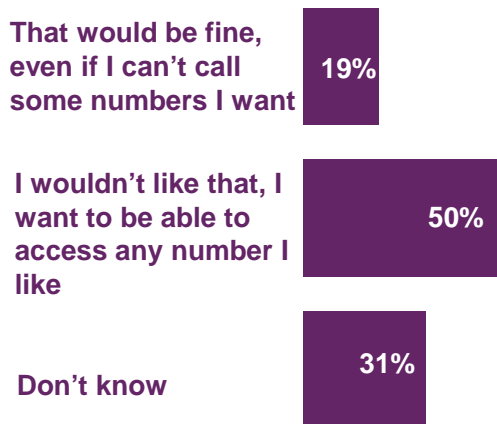
Base: All n=1189

- In general, most people call these numbers because they have to (see Q24/28 above) and so the majority would just make the call without shopping around.

Response to different hypothetical scenarios

3.18 Connectivity: Response to limited access

Q31. Let's say, as an example, an operator is not able to offer you access to all numbers in a certain range. So you could access some 0870 numbers but not all numbers in that range. How would you feel?

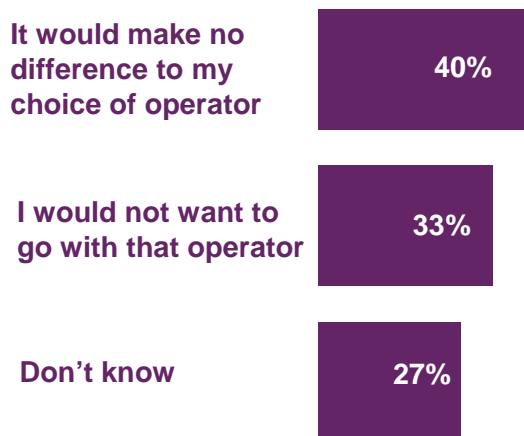


Base: All n=1189

- In the groups, consumers were somewhat unsure of how to answer both of these connectivity questions. This is reflected in the high proportion of “don’t know” responses in the quantitative work. We should therefore treat these results with a degree of caution.
- For most, the notion of not being able to call a number was peculiar:
 - *“That’s why I have a phone – I want to make the call when I want.”(fixed, PAYG mobile)*
- For a few, if it was clear which numbers were blocked, and if there was some benefit, then it would be fine if access to some numbers was limited:
 - *“I don’t call most of these numbers so if it was cheaper, then why not?”(fixed, PAYG mobile)*

3.19 Connectivity: Impact on choice of supplier

Q32. These are some of the services that you can access using 08/09 numbers. What effect would it have on your choice of operator if you could access some but not all of these services?

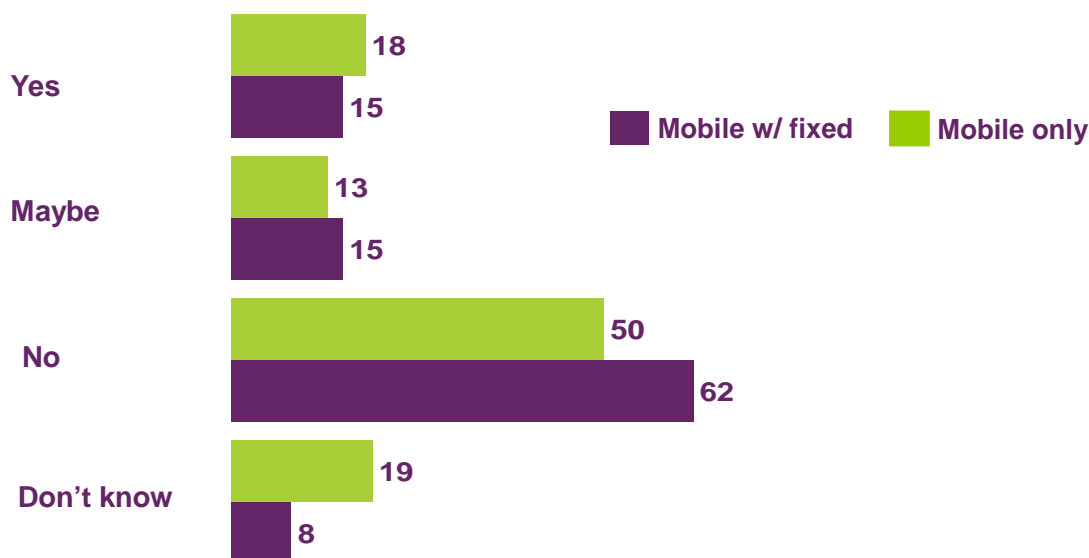


Base: All n=1189

- As with the previous question, there is a high proportion of ‘don’t knows’, and so we should treat the results with caution.
- These results were in keeping with the qualitative findings. Most felt that it would make no difference to their choice of provider as they were fairly sure they would be able to connect to the numbers they wanted to call:
 - *“They’re not going to disconnect to my bank or something, that would be stupid.” (fixed-line only)*
- Others thought the idea of not being able to connect to some numbers was strange and would definitely affect their choice of provider:
 - *“It would just be odd to be told I couldn’t connect to certain numbers. I can’t see how providers would sell this. I’d go somewhere else, for sure.”(fixed and mobile contract user)*

3.20 Offsetting the cost of 0800 calls against other calls / line rental

Q39. If all calls to 0800 numbers were free from mobiles, there would be a cost to the operator. If your total bill stayed the same, would you like to have 0800 numbers free from your mobile, even if other calls (or line rental) became more expensive?



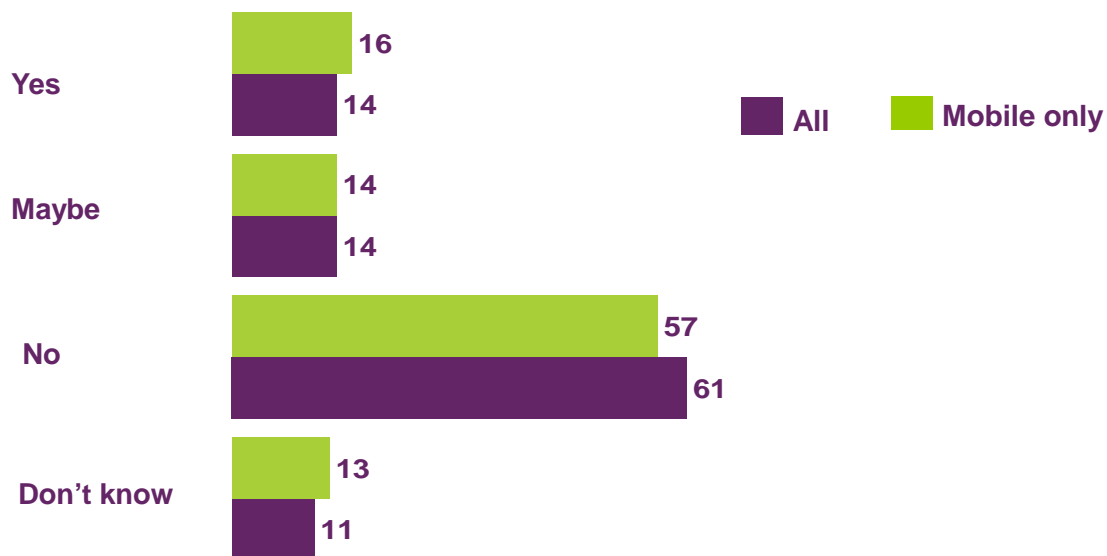
Base: All mobile users w/ fixed lines n=841
 Base: All mobile only users n=241

- Not surprisingly, the idea of 0800 calls being free from a mobile was welcomed, particularly by mobile-only users, provided that other call prices did not change.
- But offsetting the costs because there would be a cost to the operator raised suspicions and was not well received:

- *“I don’t care if there’s a cost to the operator – there’s nothing in it for us as we’ll be subsidising the cost of 0800 calls elsewhere.”(fixed, PAYG mobile)*
- Several also felt that the question lacked credibility
 - *“How can my bills be the same if I don’t call 0800 very often – it doesn’t make sense” (fixed, PAYG mobile)*
- Others were confused by the trade-off and could see no benefit to them:
 - *“Surely if they want to offset the cost of 0800 calls on to other calls or line rental, then it only makes sense for us if I’m calling these numbers quite a lot.”(contract mobile-only)*
- Overall, most did not feel strongly enough about the principle of 0800 being a free phone number from a mobile:
 - *“I like the idea of a free call to an 0800 number, but if we’re picking up the cost elsewhere, I can’t see the point of it all.” (mobile PAYG only)*

3.21 Offsetting the cost of 0845/0870 calls against other calls / line rental

Q40. If all calls to 0845 and 0870 numbers cost the same as a call to a standard geographic number, there would be a cost to the operator. If your total bill stayed the same, would you like 0845 and 0870 numbers to be priced in this way, even if other calls (or line rental) became more expensive?



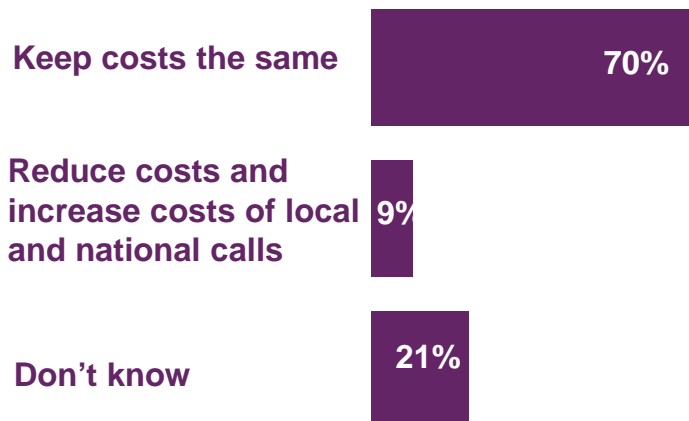
Base: All users n=1189; All mobile only n=241

- As with the 0800 option, offsetting the cost of 08/09 calls against their regular calls was not widely welcomed – primarily because the vast majority thought the costs of calls to these numbers were already far too expensive:

- “They’re winding us up. They should be reducing the cost of the calls, not asking us whether we want to bear the cost of these calls in another way. It’s ridiculous.” (fixed-line only)
- Most rejected the idea because there was no perceived benefit:
 - “It’s robbing Peter to pay Paul – I can’t see what’s in it for us and I certainly don’t care that there’s a cost to the operator.” (fixed contract mobile)
 - “Isn’t Ofcom meant to be making things fairer – how is this fairer? We’re still paying lots of money for these calls, just in a different way.” (fixed PAYG mobile)

3.22 Offsetting the costs of calling 08xx / 09xx numbers against geographic calls

Q42. Which would you prefer? To keep the costs for these 08 and 09 calls the same as they are now, or reduce the costs of these calls and increase the costs of local and national calls?

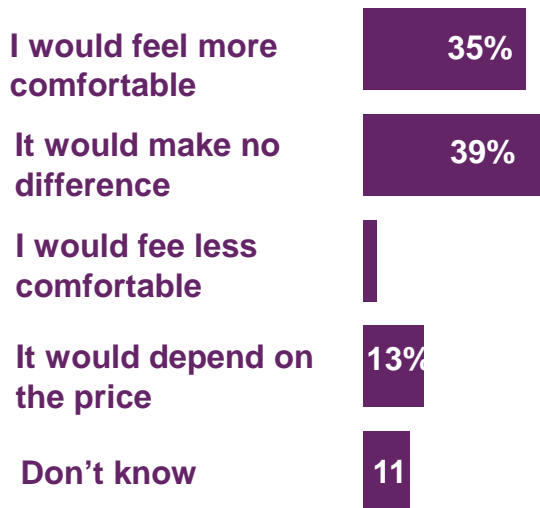


Base: All n=1189

- Again, these results were very consistent with the groups.
- The frequency of calling these numbers and the cost impact was not sufficient for this offset:
 - “I don’t call these numbers very often and I certainly don’t want other costs to go up because of them. I want the cost of these calls to come down or be included with the rest of my calls.” (fixed line / contract mobile)

3.23 Standard price range for calls to 08xx / 09xx numbers

Q41. Currently, prices for 08/09 numbers vary considerably between different providers. They also differ between landline and mobile providers. If there was a standard price range for these numbers across all providers, so that the cost of calls always lay within a ten pence per minute band, how you would feel about calling these numbers?



Base: All n=1189

- These results were consistent across the different user groups and with the qualitative findings.
- In the groups, some thought that it would reduce some of the irritation they felt when calling these numbers:
 - *“At least when I’m put on hold I’ll have a better idea of how much it’s costing me.” (fixed contract mobile)*
- Others said they would still have to make the call regardless so it would make no difference:
 - *“If you’ve got to call the bank, you’re going to do it anyway whether it’s 7p or 10p, so I don’t think it would make any difference to me.” (fixed contract mobile)*
- Overall, there was a strong sense in the groups that standardisation would provide some transparency around these numbers and this was a positive:
 - *“It’s not a big deal at the moment but it seems that anyone can charge what they like, which makes us feel as if we’re being taken advantage of. So standardising is likely to reduce that feeling.” (fixed PAYG mobile)*

Annex 1

Phase 1: Discussion guide

1.	Interviewer introduction
Explanation of research. To gather their views on the telephone numbering system, what they understand, how things could be improved, etc. Usual reassurances about confidentiality, no right or wrong, not a test of them; all groups to be recorded, etc.	
2.	Respondent introduction
<ul style="list-style-type: none">- A little bit about them, their current communications set-up (fixed-line, mobile, providers);- Open up with a general question about their telecoms services – overall impressions, value for money, likes and dislikes. Continue until everyone is engaged.	
3.	Selecting a provider
I'd like first of all to think about switching supplier and all the considerations that go with that <ul style="list-style-type: none">• Has anyone switched or thought about switching recently? If yes, what made them think about switching? If not, why not?• What elements are important when choosing a new supplier? List out for fixed, and repeat for mobile (PAYG / Contract / Simo)• Note any mentions of costs / tariff and explore attitudes to costs vis a vis particular numbers (NGC / international)• Pick up on any mentions of NGC (prompt if no mentions) and probe<ul style="list-style-type: none">- Do they look for information about these numbers? Why / why not?- If information was provided about these numbers, would this make any difference to their choice?• For those that have recently considered switching / have switched. Were they provided with any information about NGC? Did this have any effect on their decision?	
4.	Usage of / Attitudes towards NGC
Thinking now about these non-geographic numbers (i.e. 08xx, 09 numbers) <ul style="list-style-type: none">• Which of these numbers do they call?• Why do they make calls to these numbers?• How often? Do they call some of these numbers more than others? Which ones and why?• Do they call these numbers from a fixed line or mobile or both? Is there a difference between fixed and mobile when it comes to these numbers?• If they avoid these numbers, why do they actively choose not to call these	

numbers?

- What do they do instead? Are they aware of any alternatives (online, fixed vs mobile, finding a geographical number)?
- What's their overall impression of these numbers? Listen for words like 'forced / locked into'. What makes them say that?
- What's their understanding of these numbers / why do companies use them?
 - How important would it be to you if you did not have access to all the numbers in an NGC range, e.g. if they had access to some 0871 numbers but not to all of the numbers within that range?
 - First impressions – important/unimportant

4a.

If it would be important:

- How would they feel about their provider if they were not able to connect to a particular non geo number?
- What impact would it have on their calling behaviour eg make calls from a mobile/fixed line, seek information in other ways ?
- Would it make any difference when choosing suppliers?

5. **Costs of NGC**

I'd like now to think about the costs of these calls

- Firstly, how confident are you that you know the cost of these calls. Assess from a fixed line and then from mobile . . .
 - Which numbers are they confident about / not confident? (0800, 0845, 0870, etc)
 - Are the costs of these calls different when calling from a fixed line compared to a mobile?
 - Are the costs of these calls similar from all fixed lines or do they vary between operators? [Note any differences between confidence in costs and operator used, e.g. BT]
 - Note any mentions of BT's costs. Do BT customers feel more informed? Why?
 - What about calls from mobiles – are they standard across all mobiles or do they vary between operators?
- Thinking back to these non-geographic numbers that you call regularly, do you feel more confident of price with these numbers than other non geo numbers that you might call occasionally ? Why?
- When making these calls, do they shop around for a service provider that gives a better price?
- Overall, how important is it to you to know the cost of these calls? Why?

Revisit any mentions of differences between mobile and fixed line for 0800 . . .

	<ul style="list-style-type: none"> • Are they aware of this difference? • Why do they think there is a difference? What do they think of this difference? • Would they like to see 0800 numbers free from any phone? (fixed / mobile) Why is that? • Would they like to have 0800 numbers free from their mobiles, even if other calls became more expensive? Why?
6.	<p>Review bills</p> <p>Ask respondents to pull out their bills and look at their calls to non-geographic numbers</p> <ul style="list-style-type: none"> • Is the volume / cost of these calls the same as they expected? • Do they think differently about these numbers now they have seen their bills? If so, in what way? If not, why not?
7.	<p>Response to ideas for NGC</p> <p>I'd like now to get your thoughts on some possible amendments to the current system.</p> <ol style="list-style-type: none"> 1. Price ranges for these numbers are standardised across all providers (fixed and mobile) <ul style="list-style-type: none"> • First impressions – strengths / weaknesses • Why is it a good idea / poor idea? • What impact would it have on their calling behaviour? • Would it make any difference when choosing suppliers? 2. Keep the current costs for these numbers; or reduce their costs and increase the costs of other geographical costs? <ul style="list-style-type: none"> • Which would they prefer? Why that option? What makes them say that? • What impact would it have on their calling behaviour? • Would it make any difference when choosing suppliers?
7.	<p>Review, thank and close</p>

Annex 2

Phase 2: Sample breakdown

Overall requirement:

- Representation of the UK adult population (16 yrs +) in terms of age, gender, location (urban and rural), income level and socio-economic grade
- Representation of different user groups within the mobile and fixed line markets, including different payment models for mobiles, i.e.
 - Adults who have a mobile and a fixed line
 - Adults who have a mobile and no fixed line, divided between
 - Those who are monthly contracts
 - Those who are PAYG / SIMO
 - Adults who have a fixed line only, no mobile
 - Adults who have mobile phone monthly contracts
 - Adults who have PAYG / SIMO mobile phones

In addition, representation of . . .

- Representation of different mobile and fixed line operators, including, within fixed line, BT customers and non-customers
- A minimum of 100 consumers who have switched or have considered switching supplier in the past 12 months.

For each user segment, quotas were set as follows . . .

- 120 interviews with adults who have a mobile phone, but no fixed line.
- 80 interviews with adults who have a fixed line phone, but no mobile phone.
- 800 interviews with adults who have both a fixed phone and mobile phone.
- 370 interviews with those on mobile phone monthly contracts.
- 550 interviews with those on mobile phone PAYG / SIMO contracts.
- 70 interviews with those on mobile phone PAYG / SIMO contracts who do not have a fixed line phone.
- 50 interviews with those on mobile monthly contracts who do not have a fixed line phone.

To ensure a minimum of 100 per segment, we also added

- 20 booster interviews with adults who have a fixed line but not mobile
- 30 booster interviews with those on mobile phone PAYG / SIMO contracts who do not have a fixed line phone.
- 50 booster interviews with those on mobile monthly contracts who do not have a fixed line phone.

OFCOM 2010

INTRODUCTION: Good morning/afternoon. I am from Futuresight, the independent opinion research company. We have been commissioned by Ofcom to conduct a survey among people in this area about mobile phones. The survey is important and will only take about 15 minutes of your time.

⇒ **IF RESPONDENT SOUNDS LIKE THEY WISH TO REFUSE ADD:**

The survey requires us to talk to a representative group of people in the local community – your views are very important to us and you have been selected purely at random. All your answers will, of course, be treated in the strictest confidence.

GENERAL (USAGE / PAYMENT / PACKAGES)

Q1

When making telephone calls for your personal use do you use. . .
READ OUT. SINGLE CODE

	(12)	
A landline only	1	(check quotas) Go to Q3
A mobile only	2	(check quotas) Go to Q2
Both landline and mobile	3	(check quotas) Go to Q2

Q2 ASK ALL WHO USE A MOBILE (ANSWER CODE 2 OR 3 AT Q1). LANDLINE ONLY GO TO Q.3

Which of these best describes the mobile payment method you personally use most often?
READ OUT – SINGLE CODE (note: SIM only contract code as monthly contract)

	(13)
Prepay/ Pay as you go	1
Monthly contract	2

Q3 ASK ALL WHO USE A LANDLINE (ANSWER CODE 1 OR 3 AT Q1). MOBILE ONLY GO TO Q.4

Are you signed up to a calling plan on your landline (for example calls to certain numbers at certain times are inclusive, etc) **SINGLE CODE**

	(14)
Yes	1
No	2

Q4. ASK ALL WHO USE A MOBILE (ANSWER CODE 2 OR 3 AT Q1). LANDLINE ONLY GO TO Q.5

Are you signed up to a calling plan or special deal on your mobile (for example calls to certain numbers are inclusive or cheaper rates for same network, etc) **SINGLE CODE**

	(15)
Yes	1
No	2

SECTION 2: CRITERIA WHEN SELECTING A NEW PROVIDER

Q5.ASK ALL WHO USE A LANDLINE (ANSWER CODE 1 OR 3 AT Q1). MOBILE ONLY TO Q.6

If you were considering switching your landline supplier, what elements would be important when choosing a new supplier? **DO NOT READ OUT – MULTI CODE**

	(16)
Monthly cost of the package	1
The types of 'free' calls included in the package	2
Free calls to friends / family on the same network	3
The cost of international calls to some countries	4
Free evening and weekend calls	5
Length of the contract	6
Good combined deal with broadband and/or tv	7
The cost of calls to 08xx/ 09 numbers	8
Clear pricing on all calls	9
Other - PLEASE WRITE IN	0

Q6. ASK ALL WHO USE A MOBILE (ANSWER CODE 2 OR 3 AT Q1). LANDLINE ONLY GO TO Q.7

If you were considering switching your mobile operator, what elements would be important when choosing a new supplier? **DO NOT READ OUT – MULTI CODE**

	(17-18)
The amount of minutes / texts included in the package	1
The cost of calls / texts	2
Free calls to friends / family on the same network	3
The cost of international calls to some countries	4
Free evening and weekend calls	5
Length of the contract	6
Good combined deal with broadband and/or TV	7
The cost of calls to 08xx / 09 numbers	8
Notification when close to contract limit	9
Notification when close to end of credit	0
The cost of using my phone when abroad	X
Getting a new phone/the type of new phone offered	Y

Other - PLEASE WRITE IN	1
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Q7. ASK ALL WHO USE A LANDLINE (ANSWER CODE 1 OR 3 AT Q1). MOBILE ONLY TO Q.9

If you were considering switching your landline supplier, which of these elements would be important when choosing a new supplier? **SHOWCARD 7 – MULTI CODE**

	(19)
Monthly cost of the package	1
The calls included in the package	2
Free calls to friends / family on the same network	3
The cost of international calls to some countries	4
Free evening and weekend calls	5
Length of the contract	6
Good combined deal with the broadband and/or tv	7
The cost of calls to 08xx/ 09 numbers	8
Clear pricing on all calls	9
Other - PLEASE WRITE IN	0

Q8 ASK ALL WHO DID NOT CODE 8 AT Q5 AND Q7

You did not mention the cost of call to 08xx /09xx numbers when choosing a fixed line provider, why was this? **OPEN END**

(20-23)

Other (PLEASE WRITE IN)

Q9. ASK ALL WHO USE A MOBILE (ANSWER CODE 2 OR 3 AT Q1). LANDLINE ONLY GO TO Q.11

If you were considering switching your mobile operator, which of these elements would be important when choosing a new supplier? **SHOWCARD – MULTI CODE**

	(24-25)
The amount of minutes / texts included in the package	1
The cost of calls / texts	2
Free calls to friends / family on the same network	3
The cost of international calls to some countries	4

Free evening and weekend calls	5
Length of the contract	6
Good combined deal with broadband and/or tv	7
the cost of calls to 08xx / 09 numbers	8
Notification when close to contract limit	9
Notification when close to end of credit	0
The cost of using my phone when abroad	X
Getting a new phone/the type of new phone offered	Y
Other (specify_____)	1

Q10. ASK ALL WHO DID NOT CODE 8 AT Q6 AND Q9

You did not mention the cost of call to 08xx /09xx numbers when choosing a mobile provider, why was this? **OPEN END**

(26-29)
Other (PLEASE WRITE IN)

Q11. ASK ALL WHO USE A LANDLINE (ANSWER CODE 1 OR 3 AT Q1). MOBILE ONLY GO TO Q.16

Have you switched, or considered switching your landline provider in the past 12 months? **SINGLE CODE**

	(30)	
Yes- switched	1	Go to Q.12
Yes considered, but did not switch	2	Go to Q.12
No	3	Go to Q.16

Q12.

When switching or considering switching, did you receive any information about calls to 08xx or 09xx numbers, e.g. costs of calls to 0800, 0845, 0870 numbers from any landline provider? **SINGLE CODE**

		(31)
Yes	1	Go to Q13
No	2	Go to Q14

Q13.

Did receiving this information about these calls make any difference to your choice of provider? **SINGLE CODE**

		(32)
Yes, I was more attracted to this supplier	1	Go to Q16

No, it made no difference	2	Go to Q16
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Q14

Would you have like to have received information about 08/09 calls? **SINGLE CODE**

		(33)
Yes	1	Go to Q.15
No	2	Go to Q.16
Maybe	3	Go to Q.16

Q15

If you had received information about 08/09 numbers, would this have made any difference to your choice of supplier?**SINGLE CODE**

		(34)
Yes, I would have been more attracted to this supplier	1	Go to Q15
No, it made no difference	2	Go to Q15

Q16. ASK ALL WHO USE A MOBILE (ANSWER CODE 2 OR 3 AT Q1). LANDLINE ONLY GO TO Q.21

Have you switched, or considered switching your mobile phone network/ operator in the past 12 months?

		(35)
Yes- switched	1	Go to Q.17
Yes considered, but did not switch	2	Go to Q.17
No	3	Go to Q.21

Q17.

When considering a different mobile phone network/ operator, did you find or receive any information about calls to 08xx or 09xx numbers, e.g. costs of calls to 0800, 0845, 0870, from any mobile phone network or operator? **SINGLE CODE**

		(36)
Yes	1	Go to Q.18
No	2	Go to Q.19

Q18

Did finding this information about these calls make any difference to your choice of mobile phone network/operator?

		(37)
Yes, I was more attracted to this supplier	1	Go to Q.21

No, it made no difference	2	Go to Q.21
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Q19

Would you have like to have received information about 08/09 calls?

		(38)
Yes	1	Go to Q.20
No	2	Go to Q.21
Maybe	3	Go to Q.20

Q20

15. If you had received information about 08/09 numbers, would this have made any difference to your choice of supplier?

	(39)
Yes, I was more attracted to this supplier	1
No, it would have made no difference	2

SECTION 3: USAGE OF /

ATTITUDES TOWARDS NGC

Q21 ASK ALL who use a landline (answer code 1 OR 3 at q1). MOBILE ONLY GO TO Q25

16. How often do you make calls to the following numbers *from your own landline*?

SHOWCARD 21

(40-43)

Number	Regularly (every week)	Sometimes (every month)	Rarely (less than once a month)	Never
0800	1	2	3	4
0844 / 0871	1	2	3	4
0845 / 0870	1	2	3	4
09xx	1	2	3	4

Q22 ASK ALL WHO ANSWER SOMETIMES / REGULARLY TO ANY NUMBER AT Q21

What services do these numbers that you call sometimes or regularly represent? **READ OUT – MULTI CODE**

	(44)
Doctors surgery	1
Bank / Building society	2
Builders / plumbers	3
Public services (hospital, local council, tax	4

Charities	5
Quiz / Entertainment lines	6
Voting on TV shows	7
Customer support lines	8
Dial-up internet access	9
Other - please specify	0

Q23. ASK ALL WHO ANSWER RARELY OR NEVER TO ANY NUMBER AT Q21
 Why do you not call these numbers more frequently than rarely or never – from your own phone?

SHOWCARD – SINGLE CODE

	(45)
I have no need to call these numbers	1
I think they are expensive	2
I don't know how much they cost	3
I prefer to ring the geographic number	4
Other please specify	5

Q24. ASK ALL – EXCLUDE THOSE WHO SAID NEVER TO ALL ANSWERS IN Q21
 How do you feel when you call these non-geographic numbers from a landline?

SHOWCARD Q24 – SINGLE CODE

	(46)
I don't think anything about them, I just call	1
I don't understand them but call them	2
I feel forced to call them and would rather	3
I avoid calling these numbers from my	4
Other – specify	5
Don't know	6

Q25. ASK ALL WHO USE A MOBILE (ANSWER CODE 2 OR 3 AT Q1). ALL WHO USE A LANDLINE ONLY GO TO Q.29

How often do you make calls to the following numbers *from your mobile phone*?

SHOWCARD Q25

				(47-50)
Number	Regularly (every week)	Sometimes (every month)	Rarely (less than once a month)	Never
0800	1	2	3	4
0844 / 0871	1	2	3	4
0845 / 0870	1	2	3	4
09xx	1	2	3	4

Q26. ASK ALL WHO ANSWER SOMETIMES / REGULARLY TO ANY NUMBER AT Q.25

What services do these numbers that you call sometimes or regularly represent? **READ OUT – MULTI CODE**

	(51)
Doctors surgery	1
Bank / Building society	2
Builders / plumbers	3
Public services (hospital, local council, tax	4
Charities	5
Quiz / Entertainment lines	6
Voting on TV shows	7
Support lines	8
Other - please specify	9

Q27. ASK ALL WHO ANSWER RARELY OR NEVER TO ANY NUMBER AT Q25

27. Why do you not call these numbers more frequently than rarely or never – from your mobile phone? **SHOWCARD 27 – SINGLE CODE**

	(52)
I have no need to call these numbers	1
I think they are expensive	2
I don't know how much they cost	3
I call these from a landline instead	4
I call these from work	5

Other - please specify	6
------------------------	---

Q28 ASK ALL – EXCLUDE THOSE WHO SAID NEVER TO ALL ANSWERS IN Q25

28. How do you feel when calling these sorts of numbers from a mobile? **DO NOT READ OUT – SINGLE CODE**

	(53)
I don't think anything about them, I just call	1
I don't understand them but call them	2
I feel forced to call them and would rather	3
I avoid calling these numbers from a mobile	4
Other – please specify	5
Don't know	6

**Q29. ASK ALL WHO USE A LANDLINE AND A MOBILE (ANSWER CODE 3 AT Q1).
MOBILE ONLY GO TO Q.30 LANDLINE ONLY GO TO Q30**

29 When making calls to 08 or 09 numbers do you tend to use your landline or mobile or both?

READ OUT – SINGLE CODE

	(54)
Landline exclusively	1
Landline mainly	2
Either landline or mobile – both equally	3
Mobile mainly	4
Mobile exclusively	5
I don't make these calls from any of my own	6

Q30 ASK ALL

30 Are you aware of any alternatives to having to call numbers starting with 08 and 09 numbers? (If so, what are the alternatives **DO NOT READ OUT – SINGLE CODE**

	(55)
Yes, I can use the internet instead of making the call	1
Yes, I can use the internet instead of making the call	2
Yes, it's possible to find geographic numbers (e.g. 01272 xxxxx)	3
Other – please specify	4
No, I am not aware of any alternatives	5

Q31Let's say, as an example, an operator is not able to offer you access all numbers in a certain range. A range would be numbers starting with 0870 or numbers starting 0845. So, for example, you could access some 0870 numbers but not all of the numbers in that range. How would you feel?

	(56)
That would be fine, even if I can't call some of the numbers I want	1
I wouldn't like that, I want to be able to access any number I like	2
Don't know	3

Q32These are some of the sorts of services that you can access from 08 and 09 numbers. SHOWCARD OF SERVICES FROM Q22 OR Q26. What effect would it have on your choice of operator if you could access some of these services but were unable to access all of them?

	(57)
It would make no difference to my choice of operator	1
I would not want to go with that operator	2

Don't know	3
------------	---

SECTION 4 – UNDERSTAND OF CALL COSTS

Q33. ASK ALL WHO USE A LANDLINE AND MOBILE (ANSWER CODE 2 OR 3 AT Q1). LANDLINE ONLY GO TO Q.35

32 Thinking about 0800 numbers only, do you think the cost of calling an 0800 number from a landline is different or the same to calling an 0800 number from a mobile? **READ OUT – SINGLE CODE**

	(58)
Different, landline is more expensive	1
Different, mobile is more expensive	2
The same	3
Don't know	4

Q34.

34 Leaving aside 0800 numbers, do you think the costs of calling number starting with 08 and 09 are different when calling from a landline to calling from a mobile **READ OUT – SINGLE CODE**

	(59)
Different, landline is more expensive	1
Different, mobile is more expensive	2
The same	3
Don't know	4

Q35. ASK ALL WHO USE A LANDLINE (ANSWER CODE 1 OR 3 AT Q1). MOBILE ONLY GO TO Q.36

35 How confident are you that you know the costs of calls per minute to these numbers from your landline? **SHOWCARD 35**

(60-63)	Very confident	Fairly confident	Neither confident nor unconfident	Fairly unconfident	Very unconfident
0800	1	2	3	4	5
0844 / 0845	1	2	3	4	5
0870 / 0871	1	2	3	4	5
09xx	1	2	3	4	5

Q36. ASK ALL WHO USE A MOBILE (ANSWER CODE 2 OR 3 AT Q1). LANDLINE ONLY GO TO Q.37

How confident are you that you know the costs of calls per minute to these numbers from your mobile? **SHOWCARD 36**

(64-67)	Very confident	Fairly confident	Neither confident nor unconfident	Fairly unconfident	Very unconfident
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0800	1	2	3	4	5
0844 / 0845	1	2	3	4	5
0870 / 0871	1	2	3	4	5
09xx	1	2	3	4	5

Q37 ASK ALL

36 Thinking back to any 08 or 09 numbers that you call regularly, do you feel more confident of the price of these numbers than 08 or 09 numbers you don't call regularly?
DO NOT READ OUT – SINGLE CODE

	(68)
Yes, more confident	1
No, no difference	2
I don't call these numbers regularly	3
Don't know	4

Q38 ASK ALL

37 When calling these sorts of services SHOWCARD (SHOW SERVICES FROM Q22 OR Q26), do you shop around and decide which person or service to call based on the price of a call?
DO NOT READ OUT – SINGLE CODE

	(69)
Yes, all the time	1
Yes, sometimes	2
No, never	3
Don't know the prices	4
Don't know	5

SECTION 5 – POSSIBLE AMENDMENTS / SCENARIO'S

Q39 ASK LANDLINE AND MOBILE, MOBILE ONLY. LANDLINE ONLY GO TO Q.40

38 If all calls to 0800 numbers were free from mobiles, there would be a cost to the operator. If your total bill stayed the same, would you like to have 0800 numbers free from your mobiles, even if other calls (or line rental) became more expensive?

	(70)
Yes	1
Maybe	2
No	3
Don't know	4

Q40 ASK ALL

39 If all calls to 0845 and 0870 numbers cost the same as a call to a standard geographic number, there would be a cost to the operator. If your total bill stayed

the same, would you like 0845 and 0870 numbers to be priced in this way, even if other calls (or line rental) became more expensive?

	(71)
Yes	1
Maybe	2
No	3
Don't know	4

Q41 ASK ALL

40 Currently, prices for 08/09 numbers vary considerably between different providers. They also differ between landline and mobile providers. If there was a standard price range for these numbers across all providers, so that the cost of calls always lay within a 10 pence per minute band, how you would feel about calling these numbers?

	(72)
I would feel more	1
It would make no difference	2
I would feel less	3
It would depend on the	4
Don't know	5

Q42 ASK ALL

41 Which would you prefer? To keep the costs for these 08 and 09 calls the same as they are now, or reduce the costs of these calls and increase the costs of local and national calls?

	(73)
Keep the costs the same	1
Reduce the costs and increase the costs of local and national	2
Don't know	3

Q43

42 Which of the following is your landline operator? (i.e. the company you pay your call charges to)
SHOWCARD 43

	(74)
Alpha Telecom	1
BT	2
Sky Talk	3
Talk Talk	4
Tiscali	5
Virgin Media	6
Other	7
I don't have a landline	8

Q44 Which of the following is your mobile phone operator?
SHOWCARD 44

	(75)
3	1
BT Mobile	2
O2	3
Orange	4
T-Mobile	5
Toucan Mobile	6
Virgin Media	7
Vodafone	8
Tesco Mobile	9
Other	0
I don't have a mobile	X