



# Non-geographic telephone numbers

Omnibus Survey

Research Document

November 2011

## Section 1

# Introduction

## 1.1 Background

Ofcom is carrying out a strategic review of non-geographic call services. We have previously carried out a number of pieces of consumer research that are relevant to this project, including a research report that was published in October 2010.<sup>1</sup> We have commissioned further research to supplement the evidence we have already collected and to assist us in evaluating the potential options for intervention.

## 1.2 Objectives

The objective of the research was to provide insight into consumers' awareness of the cost of calling non-geographic numbers.

More specifically, the study sought to:

- Understand the prices consumers expect to pay for calls to geographic and non-geographic numbers;
- Ascertain whether uncertainty about the price of calls to non-geographic numbers is affecting demand for those calls;
- Understand the sources that consumers use to find information on the price of calls to non-geographic numbers;
- Understand the usefulness of existing price information; and
- Help to understand how consumers obtain the non-geographic numbers that they dial.

## 1.3 Findings

This report summarises the survey results:

- Section 3 covers consumers' awareness of the cost of calls to different types of phone numbers;
- Section 4 discusses what impact price uncertainty has on consumer behaviour; and
- Section 5 covers the information sources that consumers use to identify telephone numbers and to find out call costs.

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<sup>1</sup> *Non-Geographic Call Services Review*, Research Document, Ofcom, October 2010. Available at: <http://stakeholders.ofcom.org.uk/binaries/consultations/simplifying-non-geo-numbers/annexes/nts.pdf>

## Section 2

# Methodology

The research was carried out amongst a sample of UK adults in October 2011. It comprised of 2,070 face to face quantitative interviews within Ipsos MORI's weekly omnibus survey.

The sample is representative of the UK adult population and was designed to reflect the profile of UK adults by age and social class. Weighting was applied to the data to ensure a precise representation of the UK population.

The findings are based on a sample of just over 2,000 people and, like any survey research, are subject to sampling error. The error margins at the 95% confidence interval on a sample this size are approximately +/- 1% point. Error margins are wider on sub-groups within the sample.

## Section 3

# Awareness of cost of calls

## 3.1 Introduction

This section focuses on awareness of the cost of calls to geographic and non-geographic numbers from both fixed line and mobile phones.

It also compares knowledge of the cost of calling other non-geographic numbers such as 0844 and 0871 numbers with 0845 and 0870 numbers.

Respondents were asked if they knew the cost of making calls to various numbers from both their fixed line and mobile phones. The number ranges we asked about were; 01/02 numbers, 07 numbers, 080 numbers, 0845 numbers and 0870 numbers. All questions were asked with regards to the cost of making daytime peak period calls.

The 01/02 prefix applies to calls to geographic telephone numbers, the 07 prefix generally indicates that the call is to a mobile phone (although there are some exceptions) and the 0845 and 0870 prefixes indicate that the number is non-geographic. The distinction between the various number prefixes was not explained to respondents.

## 3.2 Cost of calls from fixed line telephones

The majority of respondents said that they did not know the cost per minute of making calls from their fixed line to any type of telephone number (Figure 1). The proportion of respondents who claimed to know the cost per minute of calling was relatively low for 07 numbers (at 12%), 0845 (14%) and 0870 numbers (7%). In each case, a minority of respondents claimed not to have heard of the number range we asked about; this response was most common when we asked about 0870 numbers, with 17% claiming not to have heard of this number range.

A commonly held view amongst those that didn't know the precise cost per minute of calls to different number ranges was the belief that they were expensive. This view was most frequently cited for 07 (mobile) numbers, where 43% of all respondents didn't know the exact cost, but thought that they were expensive to call from a fixed line telephone. Similar proportions gave this response for 0845 numbers (39%) and 0870 numbers (37%). The exception was 01/02 calls, where a greater proportion of respondents that said they didn't know the price, but did not think it was expensive (23%) than thought it was expensive (17%).

**Figure 1: Awareness of cost per minute of making calls from fixed lines**



*QGL01b: Which of the following best describes what you know about the cost of calling a number starting with ... from your landline*

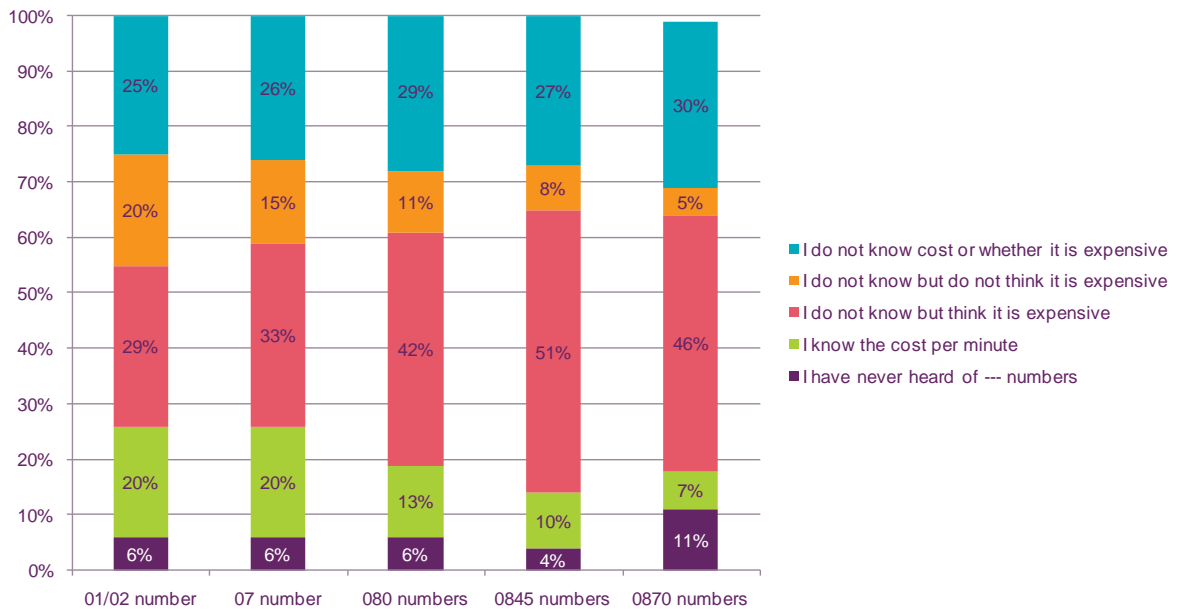
*Base: Adults 16+ with landlines and use them (1512)*

### 3.3 Cost of calls from mobile telephones

The responses to questions about the cost of calls from mobile phones were similar to those about fixed line calls (Figure 2). Again, for each number range, only a minority of respondents claimed to know the cost per minute. The proportion who claimed to know the cost per minute of calling from a mobile phone was relatively low for the number ranges beginning with 08, at 13% for 080 numbers, 10% for 0845 and 7% for 0870.

Again, a belief that calls were expensive, despite not knowing the precise cost, was commonly held. In fact, amongst mobile phone customers this was the most commonly held view about calls to all number ranges that we asked about. Half (51%) believed calls to 0845 numbers were expensive; for 0870 numbers the figure was 46%. The proportion was lower than this for 080 numbers (42%), 07 numbers (33%) and 01/02 numbers (29%).

**Figure 2: Awareness of cost per minute of making calls from mobile phones**



*QGL01c: Which of the following best describes what you know about the cost of calling a number starting with... from your mobile phone*  
 Base: Adults 16+ who use a mobile phone (1748)

### 3.4 Precise estimates of call costs

Those who said that they knew the cost per minute of making calls to the various numbers during peak times on a weekday from both fixed lines and mobile phones were then asked what that cost per minute figure was.

The following tables (Figures 3 and 4) show the expected cost of making calls to different numbers from fixed line telephones as well as from mobile phones. The mean average cost estimate figures are also shown.

The estimates of call costs from fixed lines suggest a general perception that 07, 0845 and 0870 number are more expensive to call than 01/02 geographic numbers and 0800 numbers.

The estimates of call costs from mobile phones suggest a general perception that 0845 and 0870 numbers are more expensive to call than 07 numbers, 01/02 geographic numbers and 0800 numbers.

**Figure 3: Estimated cost per minute of calls from fixed lines – amongst those who claimed to know**

% to telephone numbers	01/02	07	080	0845	0870
<b>Sample size:</b>	<b>355</b>	<b>182</b>	<b>445</b>	<b>222</b>	<b>110</b>
Its free	32%	9%	72%	24%	22%
It depends	12%	17%	8%	12%	13%
1-5p	17%	4%	1%	16%	2%
6-10p	20%	17%	4%	17%	12%
11-25p	8%	17%	2%	17%	13%
25-50p	4%	17%	2%	8%	20%
51p- £1	1%	9%	1%	4%	6%
£1+	1%	*	1%	2%	3%
<b>Mean cost (pence)</b>	<b>7.75</b>	<b>25.00</b>	<b>4.83</b>	<b>15.16</b>	<b>25.47</b>
Don't know	5%	9%	7%	6%	9%

Base: All respondents who are aware of the cost of making calls from landlines to....  
 QGL02. How much per minute do you think it cost to call a number starting with (NUMBER RANGE), during the daytime on a weekday?

**Figure 4: Estimated cost per minute of calls from mobile phones – amongst those who claimed to know**

% to telephone numbers	01/02	07	080	0845	0870
<b>Sample size:</b>	<b>325</b>	<b>335</b>	<b>210</b>	<b>158</b>	<b>119</b>
Its free	28%	30%	35%	13%	10%
It depends	16%	18%	17%	15%	16%
1-5p	8%	6%	1%	3%	*
6-10p	17%	11%	11%	11%	10%
11-25p	12%	14%	7%	17%	17%
25-50p	8%	11%	8%	13%	20%
51p- £1	3%	1%	6%	7%	11%
£1+	1%	1%	3%	8%	4%
<b>Mean cost (pence)</b>	<b>12.87</b>	<b>14.09</b>	<b>19.04</b>	<b>35.75</b>	<b>36.40</b>
Don't know	8%	7%	12%	13%	12%

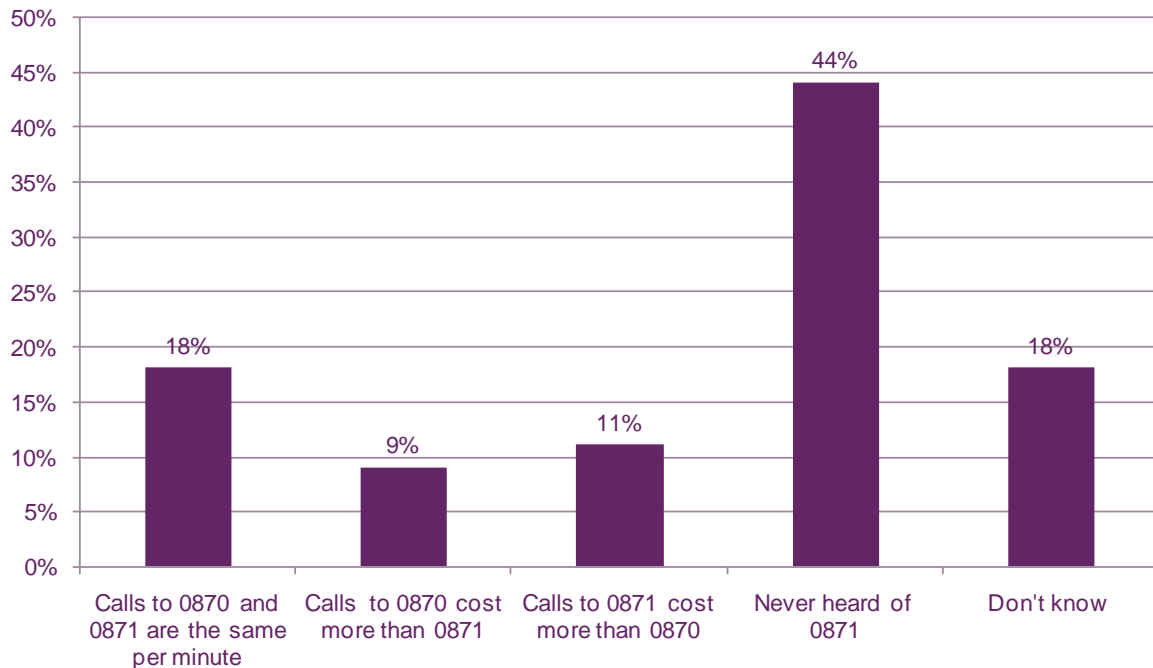
Base: All respondents who are aware of the cost of making calls from mobile phones to....  
 QGL02. How much per minute do you think it costs to call a number starting with (NUMBER RANGE), during the daytime on a weekday?

### 3.5 Cost comparisons between 0870/ 0871 and 0845/0844 numbers

Respondents who had heard of 0870 numbers were asked about the cost of making calls to these numbers compared to 0871 numbers (Figure 5). Around six in ten did not know the cost difference, or claimed never to have heard of the 0871 range.

Almost a fifth (18%) thought the costs were the same and the remainder were split fairly evenly in their opinions of which number range was the most expensive to call.

**Figure 5: Perceived cost of making calls to 0870 and 0871 numbers**



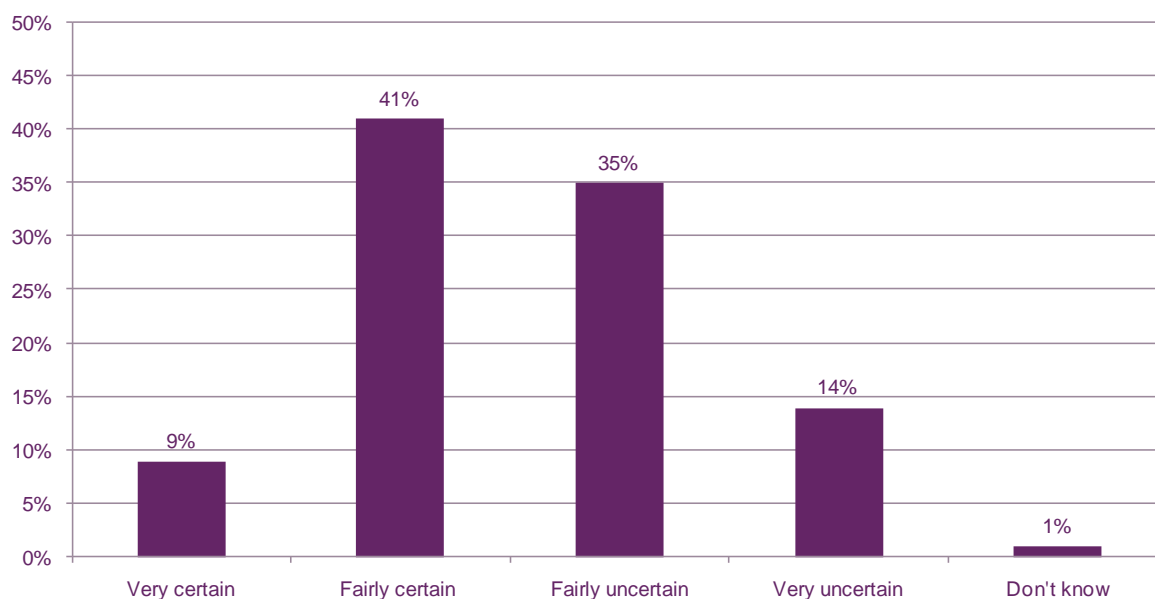
*QGL03A: I am going to ask you about the cost of making calls to 0870 numbers compared to 0871 in general. Thinking about the cost of making calls to the two numbers do you think....*

*Base: Adult 16+ aware of 0870 numbers (1689)*

Amongst the minority who gave an opinion on whether 0870 or 0871 numbers are the most expensive to call, the degree of certainty in that opinion varied, with less than 1 in 10 (9%) being 'very certain' (Figure 6).



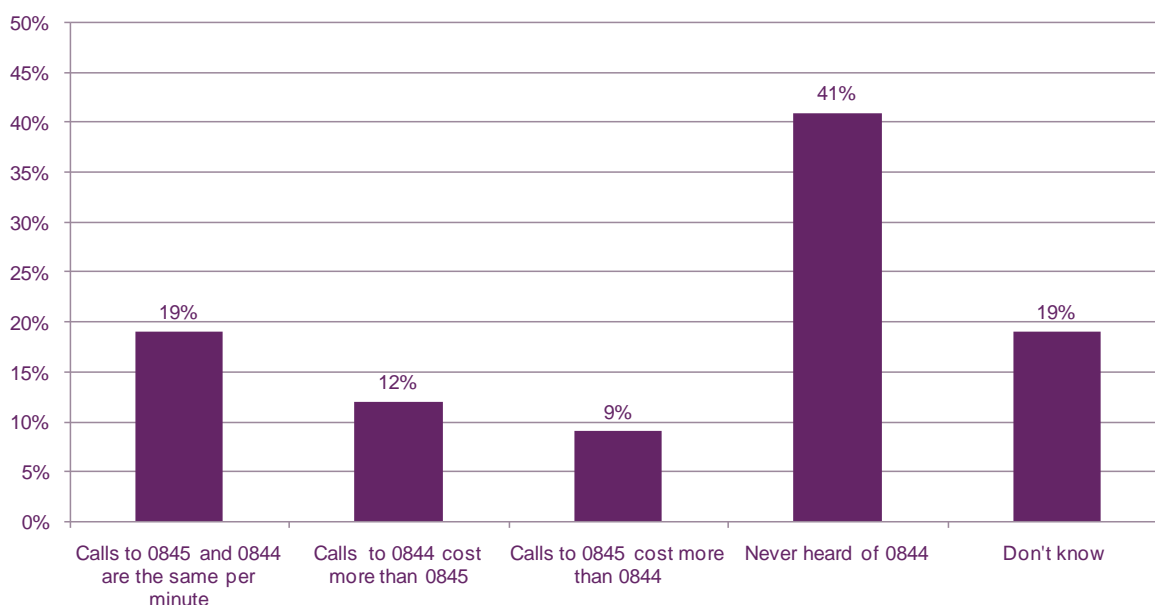
**Figure 6: Certainty of perceived cost of calls to 0870 and 0871 numbers**



*QGL03B: How certain are you?*  
 Base: Adults 16+ aware of 0871 numbers (647)

The same question was also asked to those who had heard of 0845 numbers, this time comparing these call costs to 0844 calls (Figure 7). Again, around six in ten did not know the cost difference, or claimed never to have heard of the 0844 range.

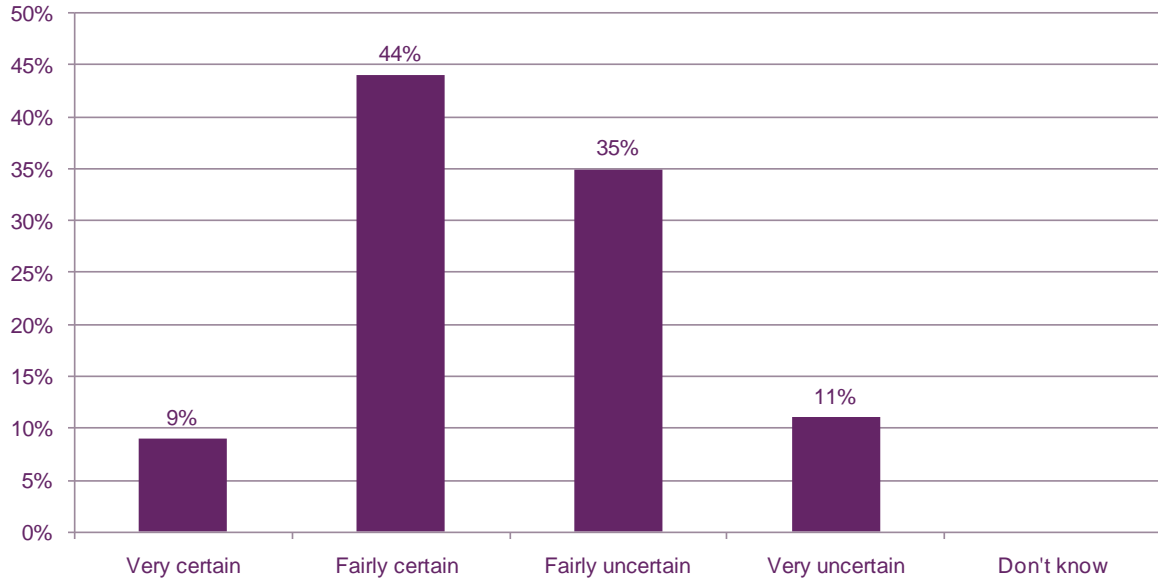
**Figure 7: Perceived cost of making calls to 0844 and 0845 numbers**



*QGL04A: I am going to ask you about the cost of making calls to 0845 numbers compared to 0844 in general. Thinking about the cost of making calls to the two numbers do you think....*  
 Base: Adults 16+ aware of 0845 numbers (1836)

Amongst the minority who gave an opinion on whether 0844 or 0845 numbers are the most expensive to call, the degree of certainty in that opinion varied (Figure 8), with less than 1 in 10 (9%) being 'very certain'.

**Figure 8: Certainty of perceived cost of calls to 0845 and 0844 numbers**



*QGL04B: How certain are you?*  
 Base: Adults 16+ aware of 0844 numbers (720)

## Section 4

# The impact of price uncertainty

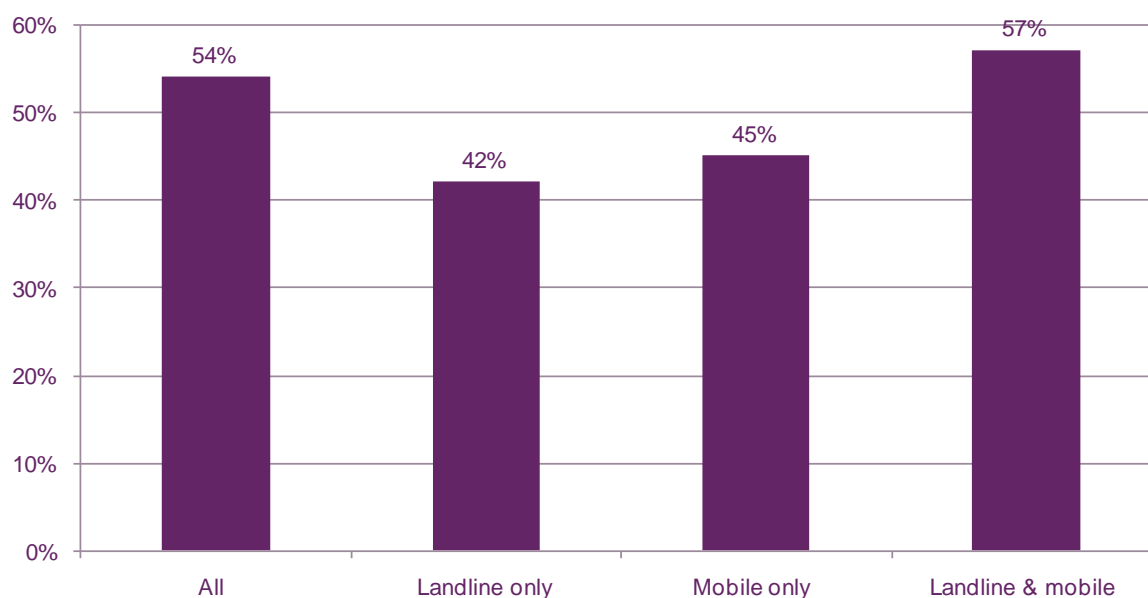
## 4.1 Introduction

This section focuses on how consumers react when they don't know the cost of a call that they are considering making.

## 4.2 Calls made or considered to numbers where the cost was not known

Overall, 54% said they had made a call or considered making a call to a number they were unsure of the cost of in the last 3 months.

**Figure 9: Proportion of phone customers who had considered making a call to any number where they were unsure about cost of calling in the last 3 months**

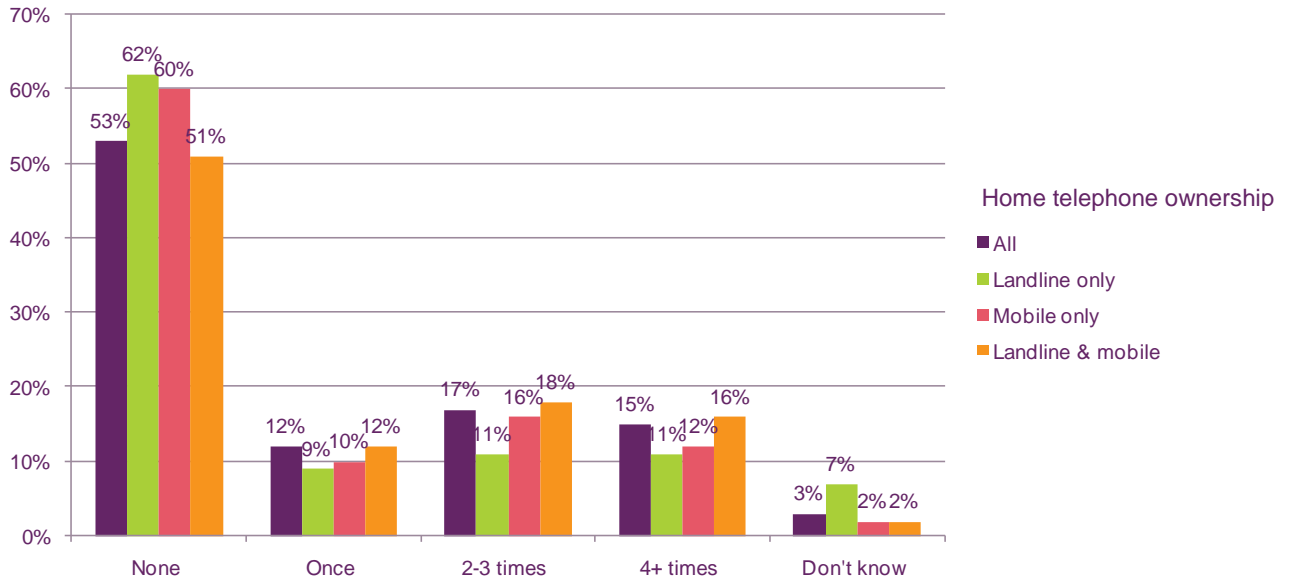


*QGL09A: In the last 3 months have you considered making a call to ANY telephone number where you were unsure about the cost of the call?*

*Base: Adults 16+ who ever use a landline or mobile phone (for personal use) to make calls (1952)*

When asked specifically about numbers beginning with 08, just over four in ten (44%) said that they had made a call or considered making a call to one of these numbers in the last 3 months when they were not aware of the cost of calling.

**Figure 10: Calls considered/made to 08 numbers in the last 3 months when cost is unknown**



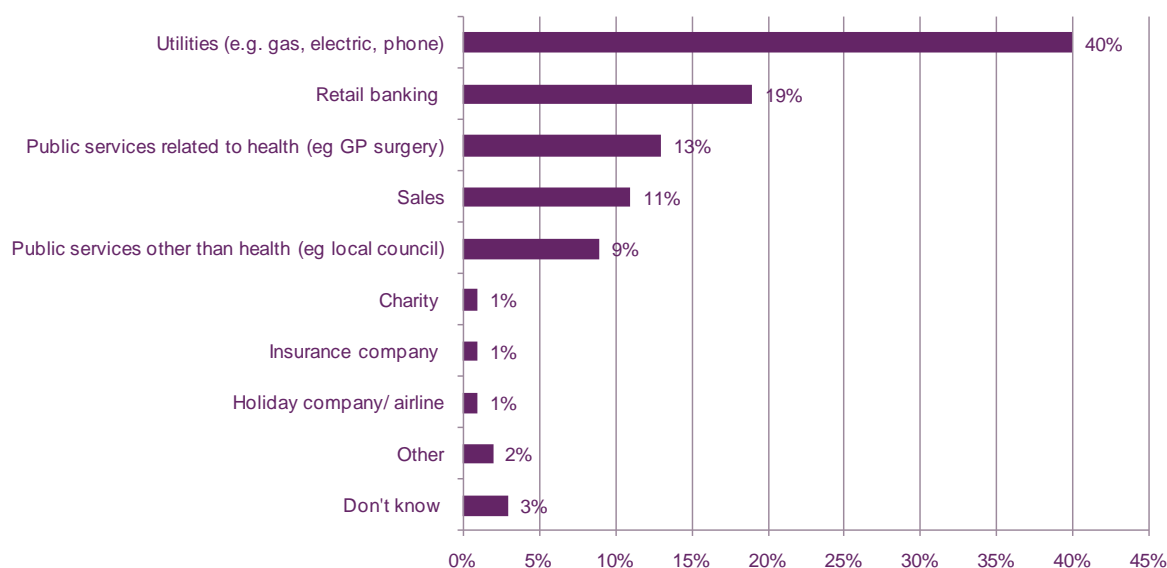
*QGL05: In the last 3 months how many times have you made or considered making a call to a number starting with the dialling code 08 that you did not know the cost of?*

*Base: Adults 16+ who ever use a landline or mobile phone (for personal use) to make calls (1952)*

### 4.3 Reasons for the calls and reactions to price uncertainty

Respondents who had called or considered calling an 08 number that they didn't know the price of calling were asked about the type of organisation that they were (considering) calling (Figure 11). The most common organisations mentioned were utility companies (40%), retail banks (19%) or public services relating to health (13%). Other mentions were to sales companies (11%), other public services (9%), charities (1%), holiday companies (1%) and insurance companies (1%).

**Figure 11: Type of service for which made/considered call to 08 number**



*QGL07: Thinking about the last occasion you either made or considered making a call to a number starting with the dialling code 08, what type of service was it for?*

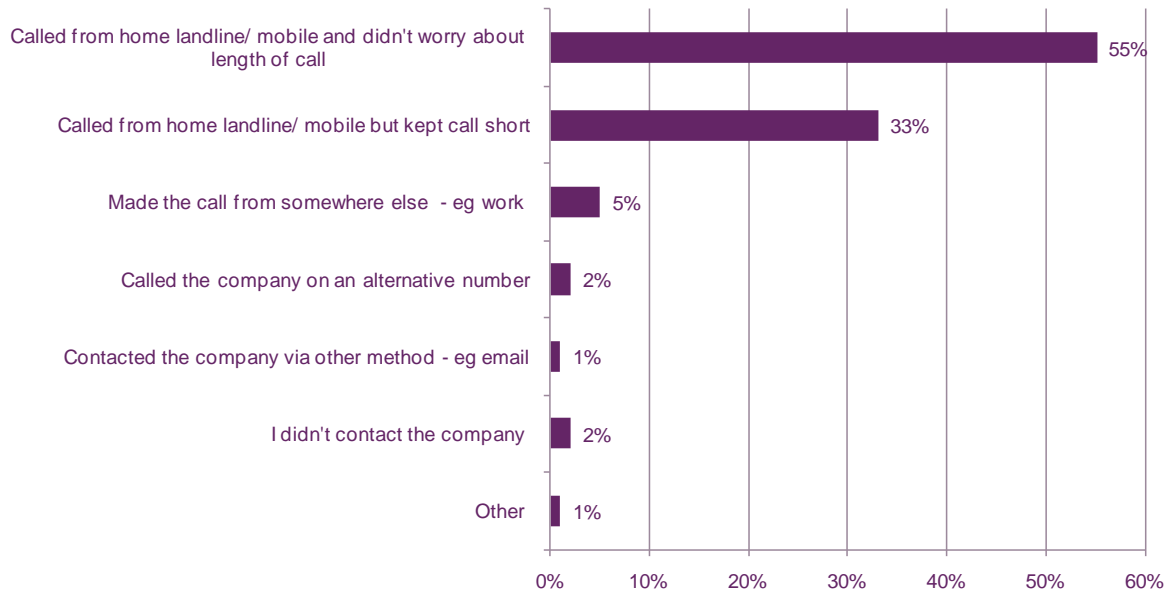
*Base: Adults 16+ who made or considered call to an 08 number (827)*

We asked consumers how they reacted the last time they were uncertain about the cost of calling an 08 number (Figure 12). Just over half (55%) of those who had considered making a call to an 08 number said that they made the call from their home fixed line or personal mobile phone and did not worry about the cost.

A third (33%) made the call from their home fixed line or personal mobile phone but kept the call short. Smaller proportions of respondents took other actions:

- 5% said that they called from somewhere else, for example from their workplace or using someone else's phone;
- 2% found an alternative number to call the company or organisation;
- 2% did not contact the company or organisation; and
- 1% contacted the company or organisation using another method, for example by email, website, or in person.

**Figure 12: Reaction to not knowing 08 call prices**



*QGL08: Looking at the options on this screen, which of the following did you do?...*  
*Base: Adults 16+ who made or considered call to 08 number (827)*

## Section 5

# Information sources used and ease of finding numbers

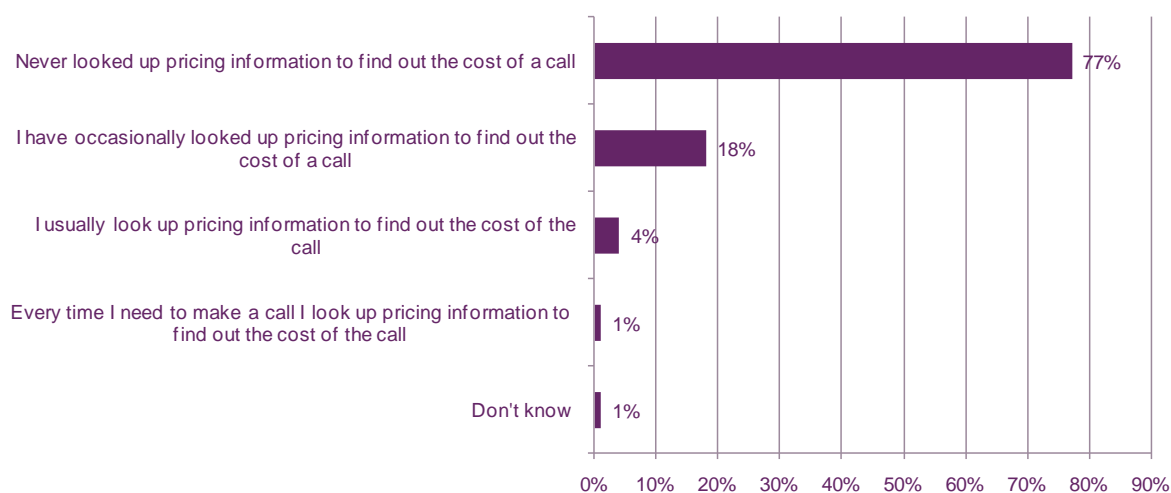
## 5.1 Introduction

This section explores which sources of pricing information are used to look for telephone numbers. It also examines what types of numbers consumers use this information for and the ease of finding the required information from these sources.

## 5.2 Information sources used

Those who had made calls or considered making a call in the last 3 months to a number that they were unsure of the cost of were asked whether they try to find out the cost of such calls (Figure 13). The majority (77%) had never looked up pricing information. The remainder (23%) had, at least occasionally, looked up pricing information to find the cost of a call, with 5% saying that this was something that they usually did, or did every time they were unsure of the cost.

**Figure 13: Whether checked pricing information before making calls when unsure of cost**

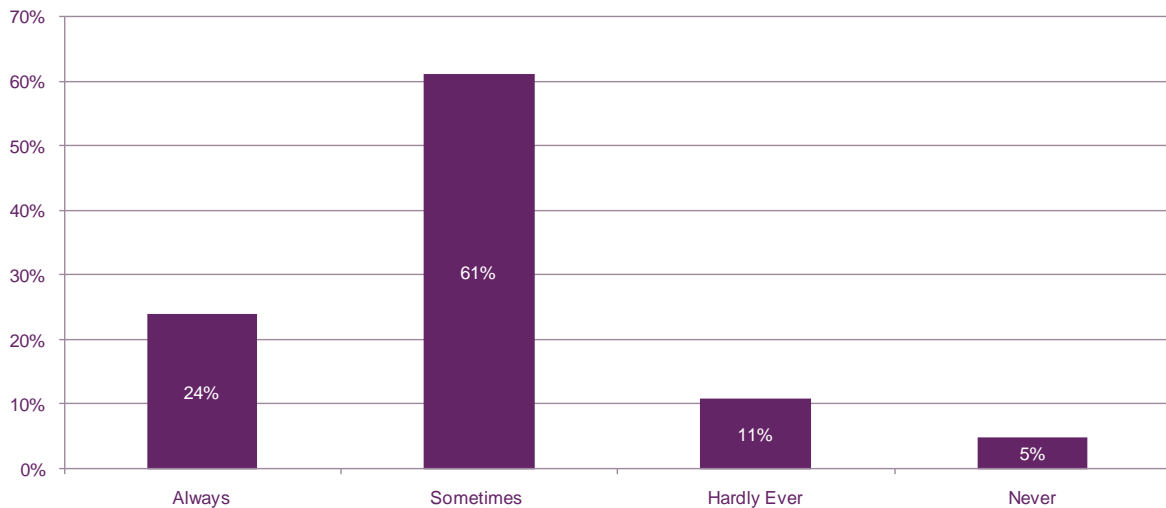


*Q GL09B: Thinking about all of the telephone numbers to which you considered making a call in the last 3 months, but were unsure of the cost to call it, please tell me which of these options best applies?*

*Base: Adult 16+ who considered making a call to a number they were unsure of the cost of (1010)*

Amongst those that had looked up pricing information, a quarter (24%) said that they had always found the information they were seeking (Figure 14). A further six in ten (61%) said that they had sometimes found it.

**Figure 14: Proportion of those who found the pricing information they sought**



*QGL10: And when you have looked up the cost of telephone numbers, have you usually been able to find the information you were looking for?*

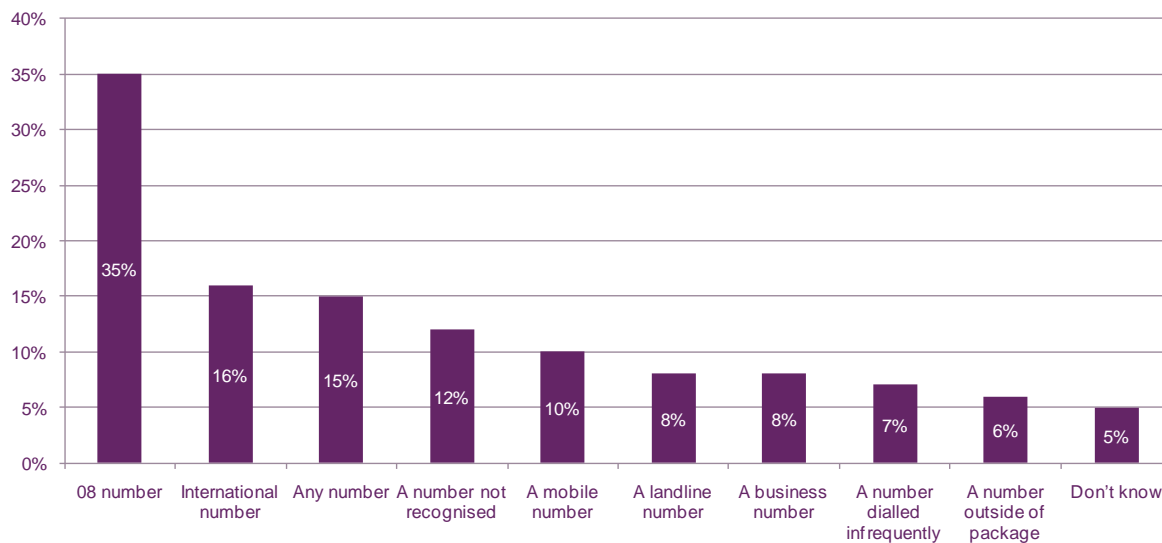
*Base: Adults 16+ who have looked up pricing information (221)*

### Types of numbers looked up

We also asked respondents what type of numbers they had looked up (Figure 15). The most common response was a number beginning with 08, mentioned by 35% of those who had looked for information. International phone numbers received the second highest number of mentions (16%).



**Figure 15: Types of numbers looked up**

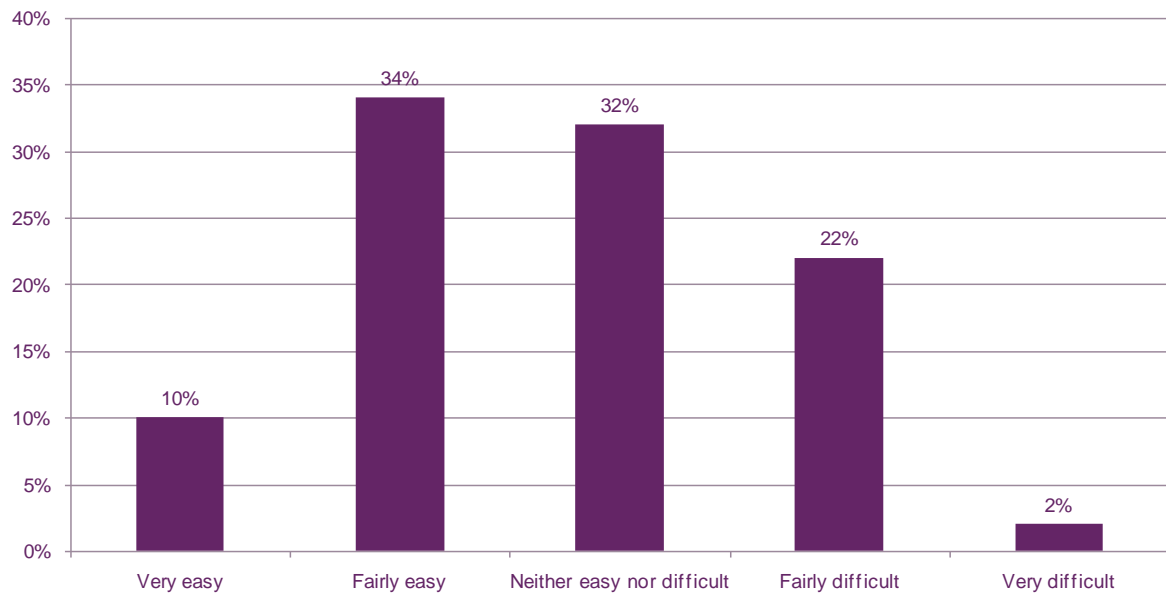


*QGL 12: What type of telephone number have you looked up pricing information for?*

*Base: Adults 16+ who have looked up pricing information (221). Only responses that 5% of respondents or more mentioned are shown on the chart.*

### **Ease of finding pricing information**

Less than half (43%) of those who had looked for pricing information said that the information had been easy to find. A quarter (24%) said that it had been difficult to find, with the remainder saying that pricing information was neither easy nor difficult to find (Figure 16).

**Figure 16: Ease or difficulty of finding pricing information**

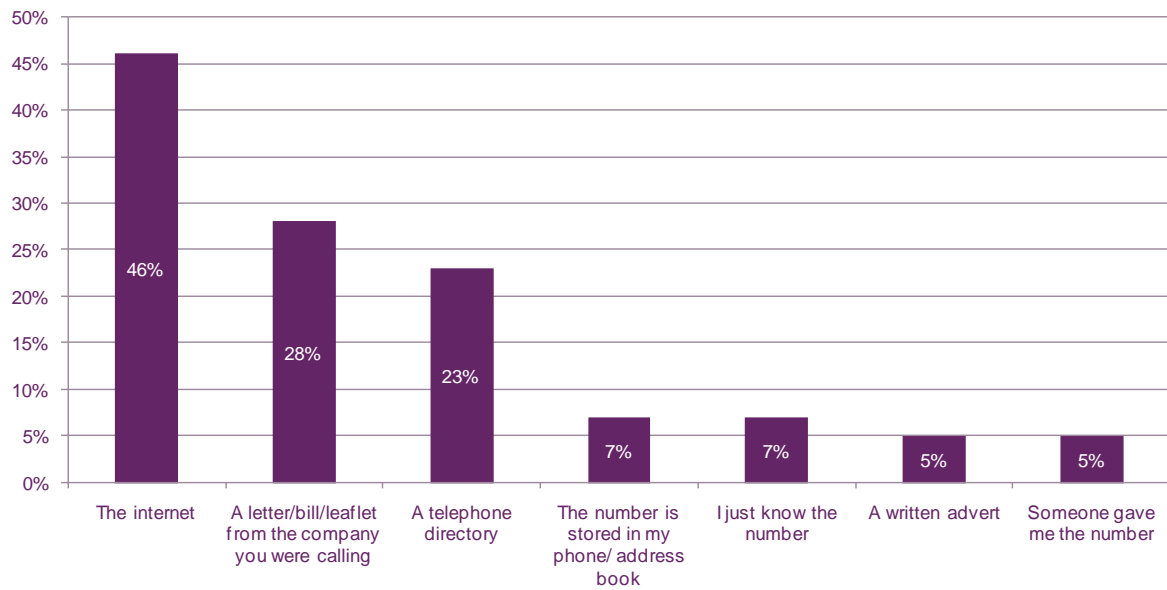
*QGL13: To what extent was it easy or difficult to find the pricing information for the cost of the call?  
Base: Adults 16+ who have looked up pricing information (221)*

### Information sources used to find phone numbers

Finally, respondents were asked what source they used to find the telephone number the last time they made a call to a company, a shop or public organisation (Figure 17).

The internet was the most commonly cited information source (mentioned by 46%), followed by a letter, a leaflet or bill from the organisation in question (28%), and telephone directories (23%). Smaller proportions of respondents mentioned other sources, such as advertisements and existing knowledge.

**Figure 17: Sources of information used to find telephone numbers**



*QGL14: Thinking about the last time you made a call to a company, shop or public organisation which of the following did you use to get the telephone number?*

*Base: Adults 16+ who ever use a landline or mobile phone (for personal use) to make calls (1952).*

*Only responses that 5% of respondents or more mentioned are shown on the chart.*

## Annex 1

# Questionnaire

I would now like to talk to you about phones.

GL01A Which of the following items do you have in your household?  
(ROTATE ORDER)

Please think about

Landline telephone

Mobile Phone for my own personal use

Mobile Phone that belongs to someone else in the household

Mobile Phone that is for work purposes only

IF GL01A = LANDLINE THEN ASK GL01B

GL01B Please could you tell whether you EVER use your landline to make telephone calls?

Yes

No

IF GL01A = MOBILE PHONE FOR MY OWN PERSONAL USE THEN ASK GL01C

GL01C Please could you tell whether you EVER use the mobile phone to make telephone calls?

If you have more than one mobile phone, please think about the one you use most often.  
Please exclude any Mobile phones you use may use for work purposes only

Yes

No

ASK IF GL01B=YES OR GL01C=YES

GL01 First, which of the following statements best describes what you know about the cost of calling a number starting with the following code from.....?

Options:(Computing – ask about whichever of these has been coded at GL01B / 1C)  
your landline  
your mobile phone

If you have more than one mobile phone, please think about the one you use most often.  
Please exclude any Mobile phones you use may use for work purposes only

Numbers:

(Computing: ask separately for each of these numbers, for each of landline and mobile if appropriate, rotating the order across the sample)

01 or 02; 07 mobile; 080; 0845; 0870

Precode list:

Non-geographic telephone numbers

- a) I have never heard of (INSERT AS APPROPRIATE) numbers
- b) I know how much it costs per minute
- c) I do not know how much it costs per minute - but think it is expensive
- d) I do not know how much it costs per minute - but do not think it is expensive
- e) I do not know how much it costs per minute and don't know whether it's expensive

ASK GL02 FOR EACH NUMBER RANGE THAT KNOW THE COST OF (SEPARATELY FOR LANDLINE AND MOBILE) (i.e. CODE B AT GL01 FOR THAT NUMBER RANGE).

GL02 How much per minute do you think it costs to call a number starting with..... (NUMBER RANGE), during peak hours, in the daytime on a weekday?

Free  
1-5p  
6-10p  
11-25p  
26-50p  
51p- £1  
More than £1  
It depends

FOR QUESTIONS GL03A, 3B, 4A AND 4B, PLEASE DISCOURAGE GUESSING, DK IS A VALID ANSWER

ASK GL03A IF CODE B,C,D,OR E FOR 0870 NUMBERS AT GL01

GL03A I am going to ask you about the cost of making calls to 0870 numbers compared to 0871 in general. Thinking about the cost of making calls to the two numbers do you think.....?

- a) Calls to 0870 and 0871 numbers cost the same per minute
- b) Calls to 0870 numbers cost more per minute than calls to 0871
- c) Calls to 0871 numbers cost more per minute than calls to 0870
- d) Never heard of 0871 numbers

ASK IF CODE A, B OR C AT GL03A

GL03B How certain are you that ..... (INSERT ANSWER CODED AT GL03A)

Very certain  
Fairly certain  
Fairly uncertain  
Very uncertain

ASK GL04A IF CODE B,C,D OR E FOR 0845 NUMBERS AT GL01

GL04A I am going to ask you about the cost of making calls to 0845 numbers compared to 0844 in general. Thinking about the cost of making calls to the two numbers, do you think .....

- a) Calls to 0844 and 0845 numbers cost the same per minute
- b) Calls to 0844 numbers cost more per minute than calls to 0845
- c) Calls to 0845 numbers cost more per minute than calls to 0844
- d) Never heard of 0844 numbers

ASK IF CODE A, B OR C AT GL04A

GL04B How certain are you that.... (INSERT ANSWER CODED AT GL04A)

Very certain  
Fairly certain  
Fairly uncertain  
Very uncertain

ASK ALL

GL05 In the last 3 months, how many times have you made or considered making a call to a number starting with the dialling code 08 that you do not know the cost of?

None  
Once  
2 or 3 times  
4 times or more

ASK GL07 AND 08 ONLY TO THESE THAT CODE ONCE, 2 OR 3 TIMES OR 4 TIMES OR MORE AT GL05

GL07 And thinking about the last occasion you either made or considered making a call to a number starting with the dialling code 08, what type of service was it for?

Utilities such as providing gas, water, electricity or telephony services

Retail banking

Public services related to health (e.g. doctors surgery, hospital, NHS direct)

Public services related to an area other than health (e.g. local council)

Charity

Sales

Other (Specify)

GL08 And looking at the options on this screen, which of the following did you do.....?

1. I called the number from my home landline/ mobile phone and did not worry about the length of the call
2. I called the number from my home landline/ mobile phone but kept the length of the call as short as possible
3. I made the call from somewhere else (e.g. work or someone else's phone)
4. I called the company on an alternative number
5. I contacted the company or organisation via another method (e.g. via email, website, or in person)
6. I did not contact the company/ organisation
7. Other (Specify)

ASK ALL

GL09A In the last 3 months have you considered making a call to ANY telephone number where you were unsure about the cost of the call?

Yes

No

IF GL09A = YES, THEN ASK GL09B

GL09B Thinking about ALL of the telephone numbers to which you considered making a call in the last 3 months, but were unsure of the cost to call it, please tell me which of these options best applies?

- a) I have never looked up pricing information to find out the cost of a call
- b) I have occasionally looked up pricing information to find out the cost of a call
- c) I usually look up pricing information to find out the cost of the call
- d) Every time I need to make a call I look up pricing information to find out the cost of the call.

ASK GL10, 11, 12 AND 13 IF HAVE LOOKED UP PRICING INFORMATION (CODE B, C OR D AT GL09)

GL10 And when you have looked up the cost of telephone numbers, have you usually been able to find the information you were looking for?

Always  
Sometimes  
Hard ever  
Never

GL11 And which, if any, of the following sources of information have you used to find out the cost of a call?

Price lists published on telephone suppliers' websites  
Somewhere on the internet other than my telephone suppliers' websites  
Information printed on your bill  
Call my telephone company's customer service line  
Advertisements  
Other (Specify)  
Have not used any sources of information to find out the cost of a call

GL12 What type of telephone numbers have you looked up pricing information for?  
DO NOT READ OUT – PROBE, WHAT OTHERS?

A number that begins with 08  
Any number  
An international number  
A mobile number  
A number you don't recognise  
A number outside of your package  
A number that begins with 09  
A landline number  
A number you dial infrequently  
A business number  
A number you dial frequently  
Other (Specify)  
Have not looked up the pricing information for making any telephone calls



INTERVIEWER: PLEASE SHOW SCREEN UNTIL OTHERWISE INSTRUCTED.

GL13 To what extent was it easy or difficult to find the pricing information for the cost of the call?

(Reverse scale between interviews)

Very easy

Fairly easy

Neither easy nor difficult

Fairly difficult

Very difficult

ASK ALL

GL14 Thinking about the last time you made a call to a company, shop or public organisation which of the following did you use to get the telephone number?

The internet

A telephone directory

A letter/ bill/ leaflet from the company you were calling

A written advert

An advert on the television/ radio

The number is stored in my phone/ address book

I just know the number

Someone gave me the number

Other- please state

Have not made a telephone call to a company, shop or public organisation