

Directory Enquiry Services Debrief

Produced by: Kantar Media

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Introduction: Background, objectives, method, sample

Background

The 118 number range is used for the provision of telephone directory enquiry services (“118 DQ services”). As a result of changes made by Ofcom to the regulation of non-geographic numbers (including 118 numbers), prices for calling 118 DQ services are “unbundled” and are made up of the access charge (set by the caller’s phone provider) and the service charge (set by the provider of the 118 DQ service). There is no maximum cap on the level of the service charge for 118 DQ services.

Ofcom launched the Call Cost Review in May 2017 in response to recent sharp increase in charges charged by some 118 DQ service providers. The objectives of the review are to:

- 1) Examine the costs for consumers of calling 118 DQ services
- 2) Consider whether these costs are causing consumer harm; and if so
- 3) Consider what remedies may be needed to address this.

As part of this review, Ofcom commissioned Kantar Media to conduct quantitative and qualitative research, the objectives of which are set out on page 5.

Following the June Consultation we have updated this slide pack with the following:

- Reference to significance tests taking account of effect size: Slide 9 (description of effect size), 11, 17,18.
- Analysis among more recent DQ users (i.e. used in the last 3 months) has been added to slides; 11 (average number of calls made), 13 (cost expectations and call connect pricing), 20 (average number of DQ calls), 28 (proportion using call connect), 34 (proportion without alternatives), 39-43 (cost expectations), 46 (awareness of call connect pricing), 52 (proportion with any call more than expected).
- Bespoke analysis relating to the access to alternatives: 35/37.

Objectives

Kantar Media conducted a quantitative face-to-face survey in order to:

- 1) Determine the extent to which consumers use 118 DQ services for personal reasons (not paid for by a business)
- 2) Assess levels of consumer reliance on 118 DQ services and the reasons why these services are used
- 3) Evaluate consumer awareness and expectations of prices

Kantar Media conducted 10 qualitative telephone depth interviews

- Additionally, respondents who used 118 DQ services in the quantitative phase were asked a re-contact question, in order to conduct a qualitative follow-up phase by way of telephone-depth interviews. The main objective of the qualitative telephone-depth interview was to gain a richer understanding of directory enquiries users experience using 118 directory enquiries, among users who had paid more than they expected to when using the service. Particular areas of interest were:
 - The circumstances of their call to 118 directory enquiries services
 - Attitudes towards and availability of alternatives to calling 118 directory enquiries
 - The impact of paying more than expected for their call to 118 directory enquiries
 - Whether they complained about their experience and if so, what happened.

The findings of the qualitative telephone-depth interviews are set out in **Annex A**.

Quantitative Methodology – adults (16+)

Sample

- 12,678 adults aged 16+ in the UK
- Focus on personal directory enquiry users in the last 12 months (L12M) (N=326)

Data collection

- Face-to-face in-home interviews
- Conducted by Kantar's Face-to-Face (F2F) Omnibus
- Run over six waves to accumulate a robust sample of personal DQ users
- Fieldwork from 01/11/2017 – 03/12/2017

Data reporting

- Total sample weighted to be nationally representative of UK adults aged 16+ years
- Source: NRS Data
- Significance testing applied at the 95% confidence level and based on effective sample size (ESS).

Sample breakdowns in this report

There are a number of ways the survey data is looked at in this report:

UK Adults 16+ (N=12,678)

This is the total survey sample – including 118 directory enquiries users and non-users.

Personal Directory Enquiries Users (Personal DQ Users) (N=326)

These are people who have called 118 DQ services in the last 12 months using either a personal mobile phone or home fixed/landline (not paid for by a business). A small number of these people have also called 118 DQ services using a phone paid for by a business over the last 12 months – however this is in addition to a personally paid for call.

This is the main sample used in the survey. Sub analysis of this main group included personal DQ users aged 65+ and those in the DE socio-economic group. This is because there were significant differences between these groups versus all DQ users and Ofcom wanted to understand the consumer impact of using 118 DQ services particularly amongst older and more vulnerable groups. Personal DQ users are also analysed by other age groups, socio-economic groups, internet access, whether they have used the call connection directory enquiries service, and whether they have paid more than they expected to for a call to 118 DQ services.

Sample labelled as:	Sample definition of personal DQ users (call not paid for by a business) in key groups	Total sample size achieved
Personal DQ users	All UK adults 16+ who have called 118 DQ services in the last 12 months using a personal mobile phone or a home fixed/landline (Q1)	326
65+	Personal DQ users who are aged 65+	150
DE	Personal DQ users who are in the DE socio-economic group	121
Used call connection on last call	Personal DQ users who used call connect (connected to correct number or incorrect number) the last time they used 118 DQ services (Q11)	90
Last call cost more than expected	Personal DQ users who say their <u>last call</u> to 118 DQ services was 'a lot more than expected' or 'a little more than expected' (Q17)	115

Non Directory Enquiries Users (Non-DQ Users) (N=2,040)

These people have not used 118 DQ services in the last 12 months (from a personal phone or a business phone). They may have had experience with 118 DQ services in the past. Specific questions for this group were run on one of the six research waves as this was sufficient to generate the required sample size for this mainstream group.

Qualitative phase – 10 tele-depths

- Ten respondents from the survey also took part in additional tele-depth interviews, lasting 15-20 minutes
- Participants were selected based on their answers to the core questions (as detailed below) – targeting respondents who paid more than expected for a call to 118 DQ services
- The fieldwork took place in December
- The interviews were audio recorded and all participants were paid a small incentive

Core questions used to define sample:

QUESTION	REQUIRED RESPONSE
Q1a. In the last 12 months, have you spent more than you had expected to for any telephone services, and if so, for what reason was this?	Yes – due to using directory enquiry services (e.g. 118 phone line services)
Q17. And after the call, how did the cost of this call compare to your expectations?	A lot more than expected / a little more than expected
Q18b. You said you had called directory enquiries more than once in the last 12 months. Which of the following applies to any of these other calls (i.e. other than your most recent one just answered about)?	At least one call was a lot more than expected / At least one call was a little more than expected

Sample:

TELE-DEPTH	LOCATION	GENDER	AGE	SEG	INTERNET ACCESS
1	South England	Female	71-75	DE	Yes
2	N Ireland	Male	61-65	C1	Yes
3	Wales	Female	31-35	DE	Yes
4	South	Male	71-75	C1	Yes
5	North	Female	46-50	C1	Yes
6	North	Male	51-55	DE	Yes
7	North	Male	56-60	DE	No
8	N Ireland	Female	71-75	DE	Yes
9	Midlands	Female	61-65	C1	No
10	Scotland	Female	76-80	DE	No

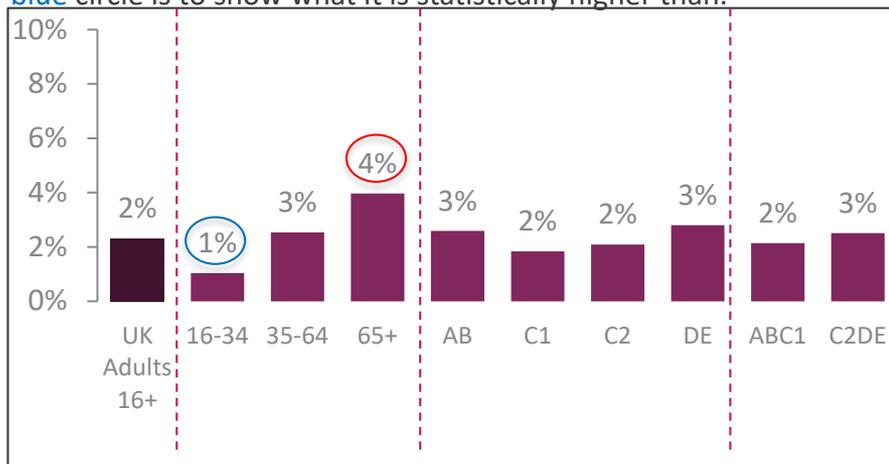
Respondents were recruited for the tele-depth interviews based on matching one of the above criteria.

A note on significance testing

Statistics have largely been tested for significance at the 95% level, based on ESS (effective sample size). Statistically significant differences are highlighted throughout the report. There are two main ways in which these are demonstrated:

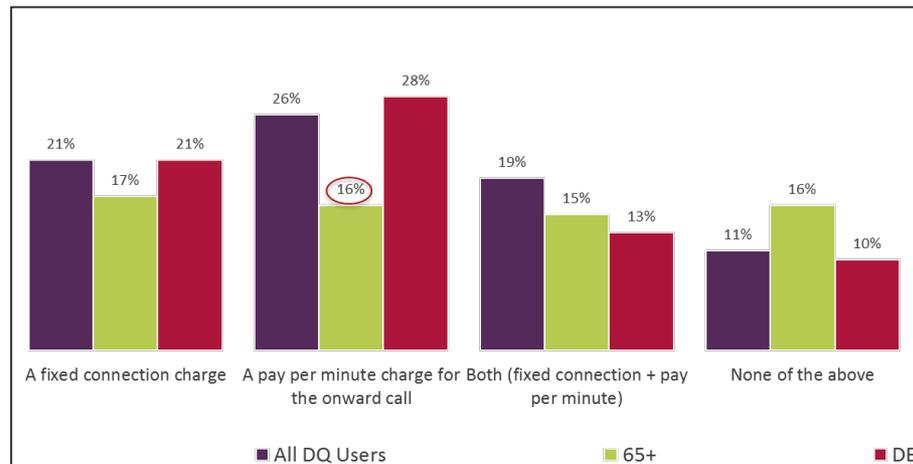
In charts where there are directly comparable demographic 'groups', significance has been tested within these groups (which are separated by the red vertical lines).

A red circle is used to show which group is statistically higher. A blue circle is used to show what it is statistically higher than.



In the above example, '65+' is statistically higher than '16-34'.

In charts where groups are not part of the same demographic grouping, significance has been tested against the total, as opposed to within groups. A red circle is used to show if something is statistically high/lower than the total result.



In the above example, DQ users aged 65+ are statistically less likely to think there is a pay per minute charge for the onward call than All DQ Users. DQ users aged 65+ and those in the DE socio-economic group have not been compared for statistical significance.

Effect size: Due to the large total sample of UK adults, following our Consultation we ran analysis on the 'effect size' in relation to the demographic differences of DQ users. Based on the results of these additional statistical tests we conclude that DQ use is fairly consistent across age and SEG bands. However, older adults (aged 65+) are significantly more likely to use these services than younger adults (16-34 year olds).

Key findings

Summary of key findings

Directory enquiries usage in the last 12 months

Personal use of 118 DQ services in the last 12 months is higher among UK adults aged 65+ than those aged 16-34

- 2% of UK adults 16+ have used 118 DQ services (not paid for by a business) in the last 12 months, older adults aged 65+ are more likely to use DQ services than 16-34 year olds (4% vs. 1%).
- Almost three in five (59%) of these DQ users have made a call from a home fixed/landline in the last 12 months, while 43% have made a call from a personal mobile phone. Calling from a home fixed/landline is significantly higher amongst users aged 65+ (89%).
- On average, DQ users have made 2.4 calls to 118 DQ services over the last 12 months. While just under half (46%) have made just one call to 118 DQ services in the last 12 months, one quarter (25%) have made over three calls, and one in eight (12%) have made 5+ calls. The average number of calls made among more recent users (i.e. called in the last 3 months) is 3.3.
- Almost two in five (39%) DQ users (who knew how many calls they had made – i.e. 98% of DQ Users) claim to have used call connection on at least one of their calls to 118 DQ services in the last 12 months. Three in ten (30%) said they used call connect on their last call.

Circumstances of last call to 118 DQ services

Usage of 118 DQ services brands generally reflects awareness. '118 118 The Number' is the brand most DQ users called the last time they used 118 DQ services

- Half (51%) of DQ users called '118 118 The Number' the last time they made a call. This is followed by 'BT 118 500' (11%) however many DQ users were unable to recall which service they used the last time they made a call to 118 DQ services (24%).
- Usage levels generally reflect awareness, with '118 118 The Number' being the service most highly recalled (63%), followed by 'BT 118 500' (19%), while one in five (22%) of DQ users could not name a brand unprompted.

Summary of key findings

Circumstances of last call to 118 DQ services cont...

Ability to recall a DQ brand's number plays a large role in which 118 DQ service users call

- When personal DQ users were asked why they used a specific 118 DQ service on their last call, the majority of users said they called the only number they knew (31%), while over one quarter (26%) called the number that first came first to mind and 14% said they remembered the number from advertising. Very few DQ users claim to have chosen the brand based on cost (3% 'It was the cheapest') or on the level of service i.e. best service and knowledgeable operators (1%) / connecting the call for you (2%).

For a majority of personal DQ users, their last call to 118 DQ services was 'important', with government services, health services and residential numbers being the most frequently requested numbers

- Four in five (82%) DQ users said it was 'important' they received the telephone number they were looking for, at the time they requested it, with two in five (42%) saying it was 'very important'.
- DQ users are looking for a wide range of numbers when calling 118 DQ services – the highest being government services (12%), health services (11%) and residential numbers (11%).
- Half (51%) of DQ users received the number they were looking for verbally the last time they called 118 DQ services. Almost three in ten (28%) were connected through to the number they needed, and 30% were connected overall (to a correct or incorrect number).
- Seven in ten (71%) DQ users said they were satisfied with their last experience of calling 118 DQ services. This decreases to just over half (53%) of users whose call cost more than they expected it to.

Alternatives to using 118 DQ services

- Four in ten (42%) DQ users claim they had no alternative options to using DQ services, at the time of making the call. Of users who did have alternative options but chose to call 118 DQ services, speed of access and convenience prevailed, although almost one quarter (23%) said they could not find the number any other way.

Summary of key findings

Knowledge and expectations of call costs

DQ users expect the cost of calls to 118 DQ services to be higher than non-DQ users:

- Around three in ten UK adults were not able to give any estimate of the cost of calling a DQ service from either a fixed or mobile phone, even when provided with a list of potential price ranges. On average, across the total population estimates of calling a DQ service for just under one minute from a home/fixed landline are £1.21 and estimates of calling from a mobile are £1.56.
- Non-DQ users think a call to 118 DQ services using a home/fixed landline (for a call that would last just under one minute) would cost £1.18. This is significantly lower than the £1.95 DQ users think this service would cost.
- For calls to 118 DQ services using a personal mobile phone, expectations of call costs are slightly higher. Non-DQ users believe a call (lasting just under one minute) would cost £1.55, while DQ users believe it would cost £2.36 on average.
- Expectations of call costs are broadly similar among more recent DQ users – as illustrated on slides 41 and 43.

There is low understanding about how call connection is priced, particularly amongst DQ users aged 65+

- Overall, 86% of DQ users do not understand the pricing for an onward connected DQ call, with just 14% able to correctly identify how call connect is priced. Awareness is not significantly different among more recent DQ users (16% among those who called DQ in the last 3 months).
- One in five DQ users think there is a fixed connection charge, 26% believe there is a pay per minute charge while a further fifth (19%) believe there both a fixed charge and pay per minute charge. Of those who think there is a pay per minute charge, almost 3 in 5 think this is charged at the same rate as the call to DQ services, however 28% think it is charged at the same rate as if they had called the number directly themselves.
- Over one in five (22%) DQ users 'don't know' how call connection is priced, significantly increasing to over one third (35%) of DQ users aged 65+. Of these DQ users who 'don't know' how call connection is priced, their expectation is that it would be expensive (61%), though almost one third (31%) were still unsure.

Summary of key findings

Knowledge and expectations of call costs cont...

Majority of DQ users didn't know the cost of calling 118 DQ services before making their last call

- One in five (19%) DQ users said they knew the cost of calling 118 DQ services before they made their last call, which decreases to one in ten (10%) DQ users in the DE socio-economic group. More than two in five (43%) DQ users said before making their last call to DQ services they did not know the cost of the call, or have any idea of what it may be.

Over one third (35%) of DQ users said the cost of their last call to 118 DQ services was more than they expected, and two in five (39%) DQ users said they had made at least one call in the last 12 months to 118 DQ services that cost more than they expected it to be.

- Over one third (35%) of all DQ users said the cost of their last call to 118 DQ services was more than they expected it to be, with over one quarter (27%) saying it was a lot more than expected. This is significantly higher for DQ users in the DE socio-economic group, where almost half (49%) said their last call to DQ services cost more than expected.
- We asked DQ users whose last call cost more than expected how much the call was compared to their expectations. The average call cost £5.44 more than expected (when removing two outliers with much higher than average call costs).
- Taking into account DQ users who made other calls to DQ services in the last 12 months (apart from their last call to 118 DQ services), two in five (39%) said they have made a call that cost more than expected over the last 12 months.
- One in ten DQ users recalled their DQ experience when asked if they had spent more than they expected to for any telecoms service in the past 12 months, and presented with a list of possible reasons.
 - We consider these to represent those that either had a particularly memorable DQ 'bill shock' experience, or had not experienced other more significant 'bill shocks' through their use of telecoms in a 12 month period.

Summary of key findings

Impact of using 118 DQ services

Some DQ users are being impacted financially as a result of calling 118 DQ services

- Almost one in ten (8%) DQ users said they felt an impact on their household finances as a result of calling directory enquiries services – either not being able to pay for their telephone service, having to delay payment of their telephone service, borrowing money to pay for their telephone service, or cutting back on other things to pay for their telephone service.
- This increases to one in six DQ users (16%) within the DE socio-economic group, and a similar portion (17%) of DQ users whose last call cost more than they expected it to.
- The qualitative case studies, with DQ users who have made calls to DQ services that cost more than they expected, give an illustration of the impact making calls to directory enquiries has had on some of the more vulnerable members of society.

Non-directory enquiry users

Majority of non-directory enquiry users say they have no need for the service, though for one in ten their reason for not using the service is cost-related

- 97% of UK adults 16+ have not called directory enquiry services (for either personal or business reasons) in the last 12 months. A majority (70%) of these non-DQ users feel they have no need to call 118 DQ services – they have other ways to find the telephone numbers they need. One in ten non-DQ users (9%), say their reason for not calling directory enquiry services is cost-related, with a majority of these non-DQ users saying ‘it is too expensive’.

A minority of non-DQ users say not using (or not being willing to use) 118 DQ services is a problem for them

- 4% of non-DQ users say not using DQ services is either a problem for them, or slightly inconveniences them.

Section 1: Directory enquiries usage in the last 12 months (L12M)

2% of UK adults used 118 DQ services personally (not paid for by a business) in the L12M, significantly higher (4%) for adults aged 65+ than those aged 16-34

UK adults 16+ who have used 118 DQ services L12M (not paid for by a business) - UK Adults 16+



Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

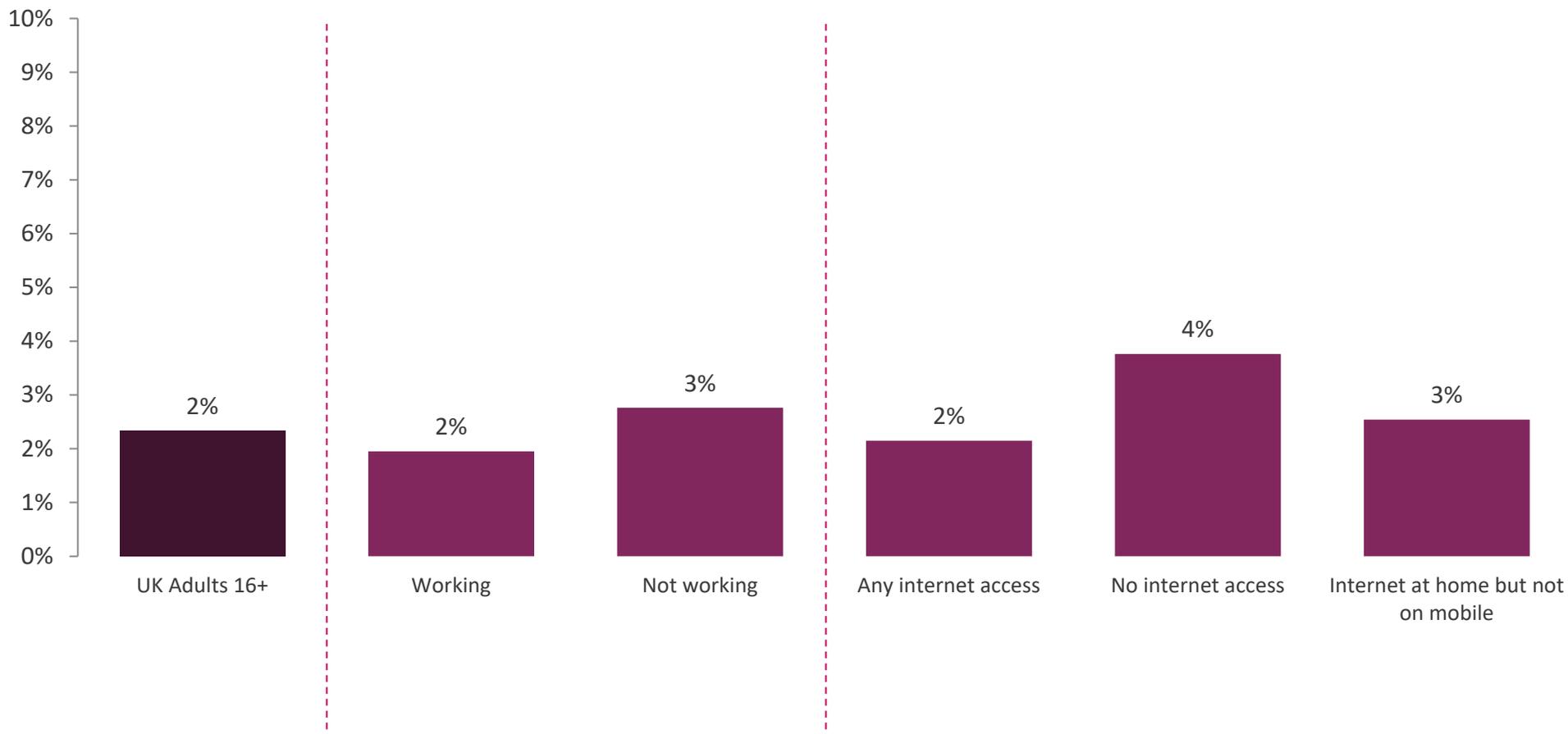
Question: Q1. In the last 12 months, have you made a call to a directory enquiry 118 service on either a fixed line or mobile phone? (This includes calls even if you did not manage to speak to an operator or get the information you needed from them). Prompted. Multi-code.

Base: UK Adults 16+ (12,678); 16-34 (3,495); 35-64 (5,330); 65+ (3,853); AB (2,394); C1 (3,392); C2 (2,637); DE (4,255); ABC1 (5,786); C2DE (6,892)

Note: Due to the large overall sample size additional significance testing took place post Consultation (i.e. considering the 'effect size'). From this we conclude that DQ use is fairly consistent across age bands. However, older adults (aged 65+) are significantly more likely to use these services than younger adults (16-34 year olds).

Comparison of DQ use by working/non-working and whether internet is available shows no significant differences (based on effect size)

UK adults 16+ who have used 118 DQ services L12M (not paid for by a business) - UK Adults 16+



Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

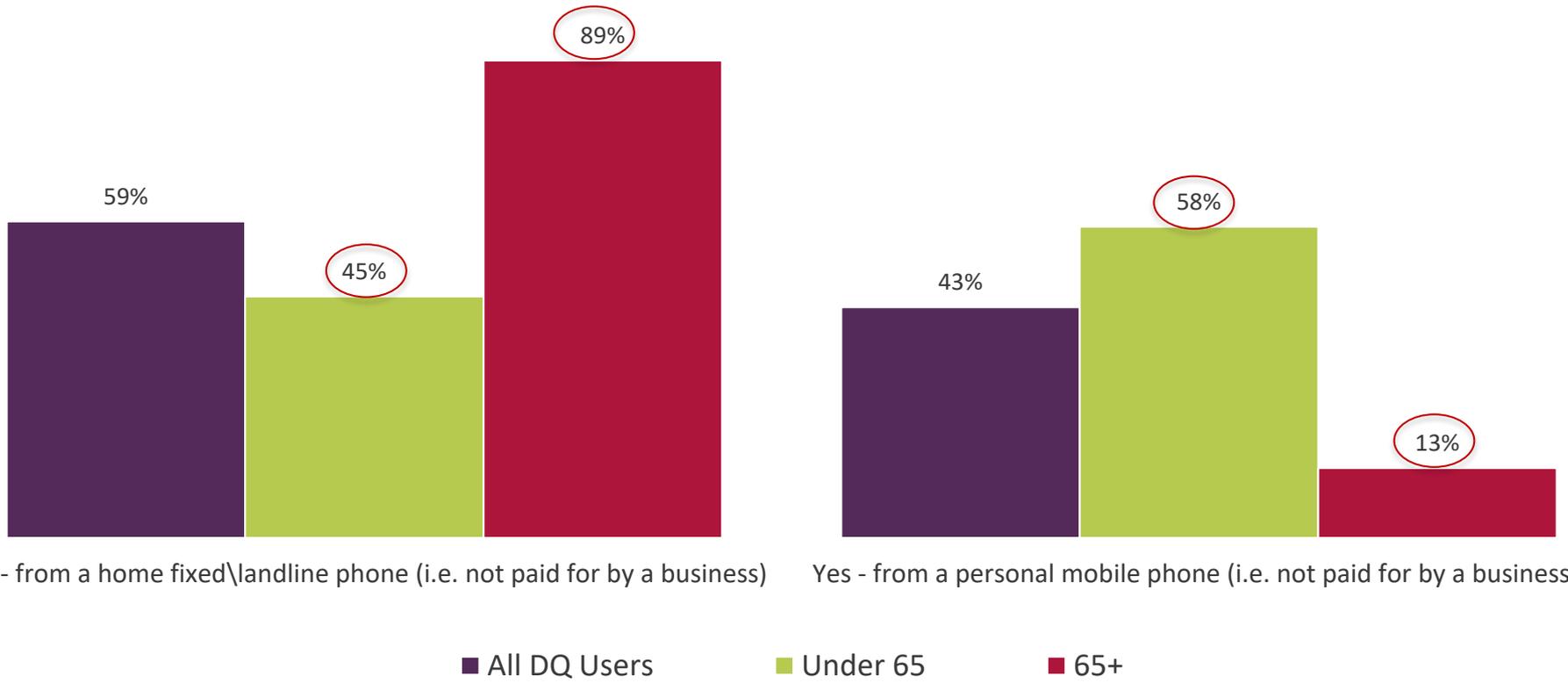
Question: Q1. In the last 12 months, have you made a call to a directory enquiry 118 service on either a fixed line or mobile phone? (This includes calls even if you did not manage to speak to an operator or get the information you needed from them). Prompted. Multi-code.

Base: UK Adults 16+ (12,678); Working (5,808); Not Working (6,870); Have internet access (10,824); No internet access (1,854); Internet at home but not on mobile (3,436)

Note: Due to the large overall sample size additional significance testing took place post Consultation (i.e. considering the 'effect size').

The majority of calls to 118 DQ services are made from landline phones, with 89% of DQ users aged 65+ calling using a landline

How DQ users have called 118 DQ services L12M – Personal DQ Users (N=326)



*Yes' responses were multi-code and therefore do not add to 100%, as some respondents had placed more than one call in the last 12 months, and not used the same device.

Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

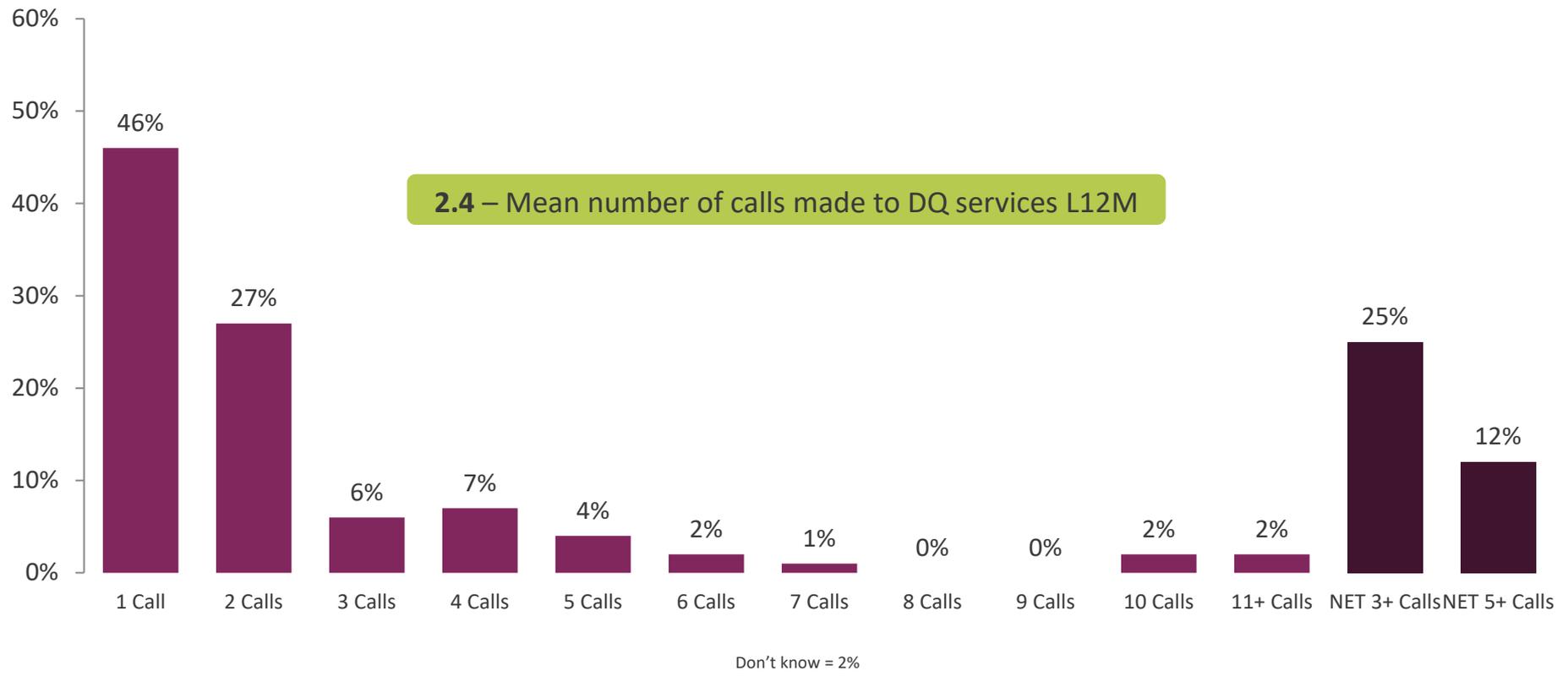
Question: Q1. In the last 12 months, have you made a call to a directory enquiry 118 service on either a fixed line or mobile phone? (This includes calls even if you did not manage to speak to an operator or get the information you needed from them). Prompted. Multi-code. 'Yes – from a fixed landline or mobile phone paid for by a business' response not shown on chart above.

Base: All personal DQ Users (326); Under 65 (176); Over 65 (150)



Almost half of personal DQ users made one call to 118 DQ services in the last 12 months. One quarter have made more than three calls

Number of calls made to 118 DQ services L12M (not paid for by a business) – Personal DQ Users (N=326)



Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

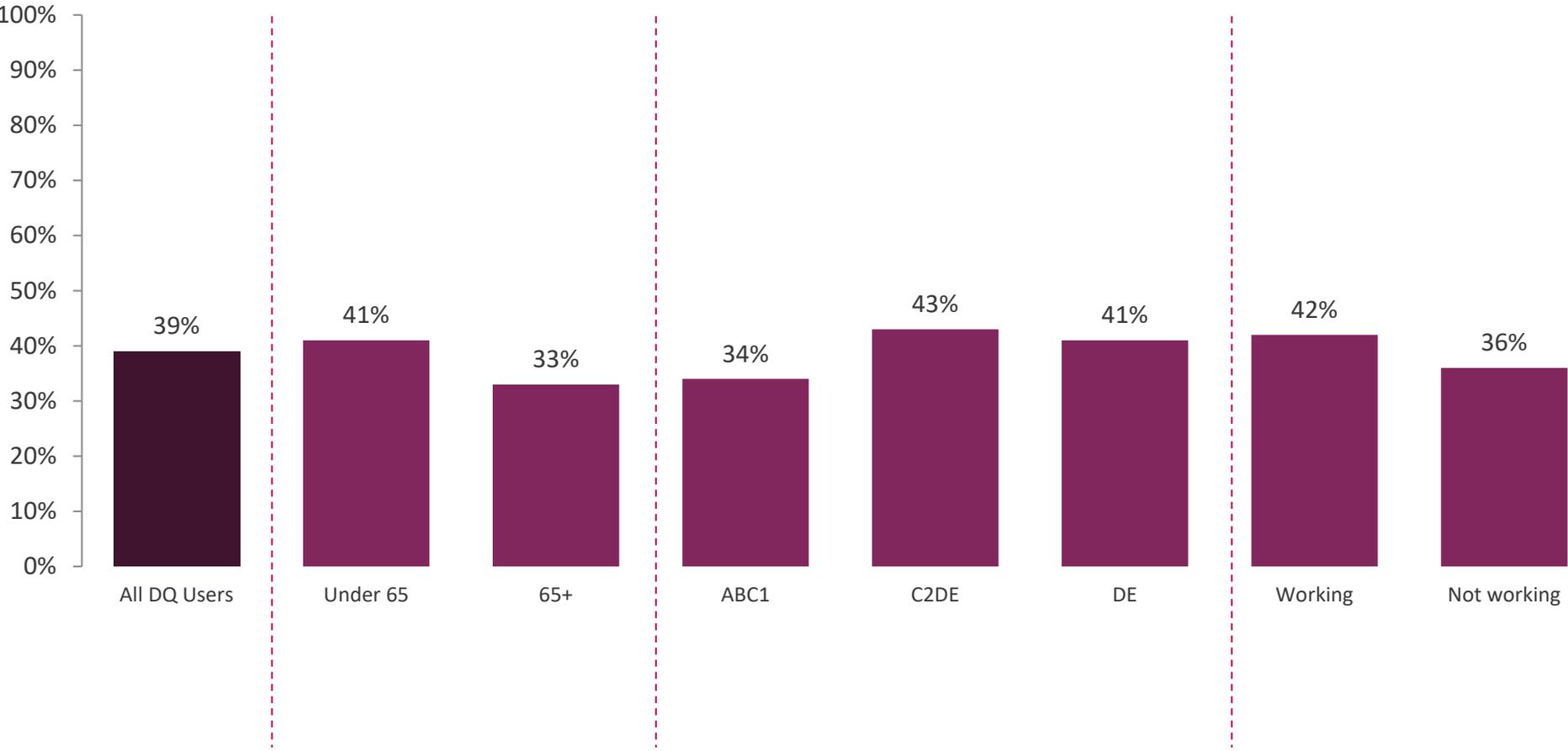
Question: Q2. How many times in the last 12 months have you made a call to a directory enquires service from your home fixed line or personal mobile phone (i.e. not paid for by a business)? Prompted. Single Code.

Base: All personal DQ Users (326). Average (mean) calculated by assigning numeric value to each call (ie 1 call = 1) and calculating the average. 11+ calls was assigned the numeric value of 11. Mean rounded to 1 decimal place. Base size for mean (excl. don't know): All DQ Users (319). The average number of calls made among more recent DQ callers (L3M) was 3.3.



Almost 2-in-5 (39%) DQ users have used call connection on any of their DQ calls in the L12M

Percentage of DQ users who have used call connect on any call L12M – **Personal DQ Users who know how many calls they have made L12M (n=319)**



Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

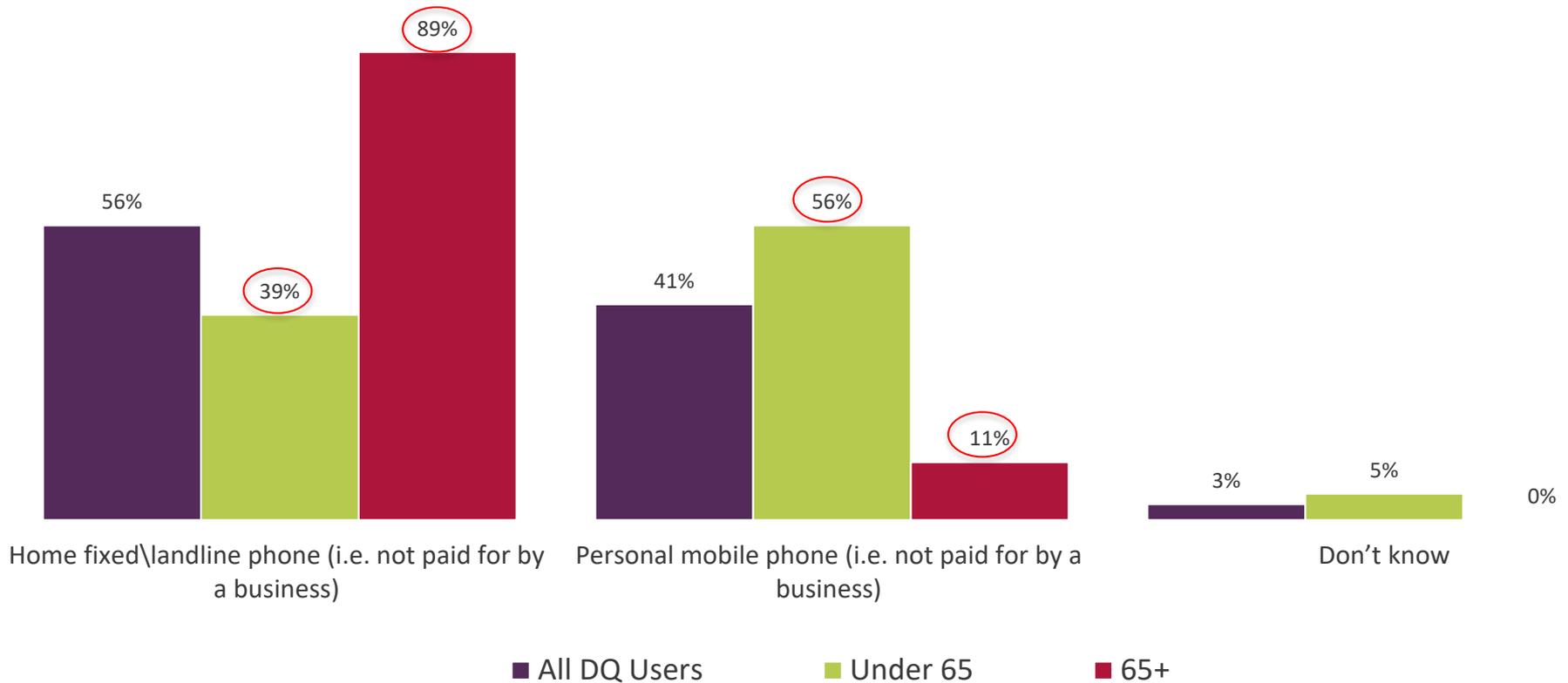
Question: Q5. Earlier you said you had made [auto-insert number of calls from Q2] to directory enquiry services in the past 12 months. On how many of these calls were you connected through to the telephone number you were looking for, using the onward call connection service? Numeric Response.

Base: All personal DQ Users who knew how many calls they have made L12M (319); Under 65 (173); 65+ (146); ABC1 (145); C2DE (174); DE (117); Working (116); Not Working (203)

Section 2: Circumstances of last call to 118 DQ services

Over half (56%) of DQ users used a home fixed/landline phone for their last call to 118 DQ services, increasing to 9-in-10 DQ users aged 65+

On which device was last call to 118 DQ services made – **Personal DQ Users (n=326)**



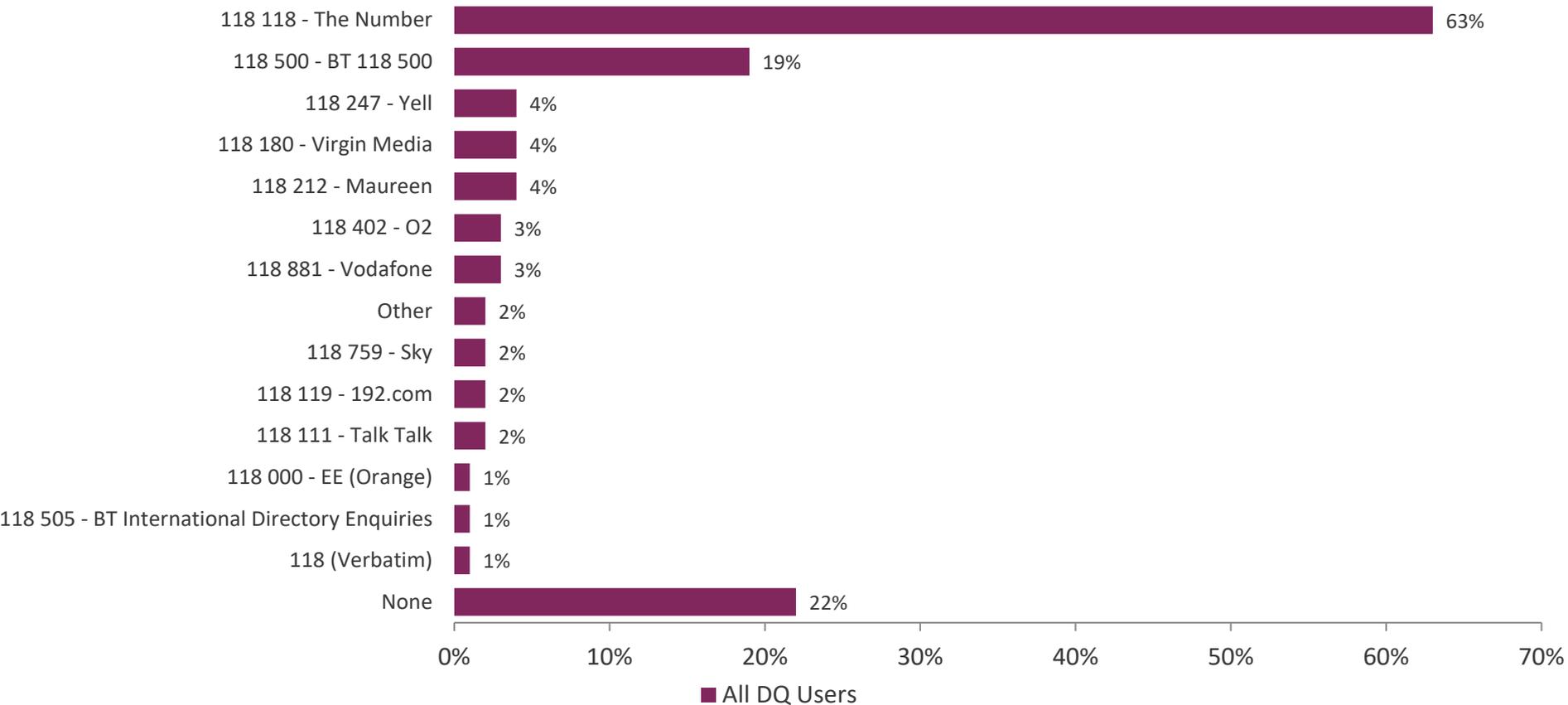
Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q7. Thinking about the last call you made to a directory enquiry service on a personal line, was this from: Prompted. Single-code.

Base: All personal DQ Users (326); Under 65 (n=176); 65+ (n=150)

'118 118 The Number' is the directory enquiry service most DQ users are spontaneously aware of, followed by 'BT 118 500'

DQ services aware of (unprompted) – Personal DQ Users (n=326)



Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

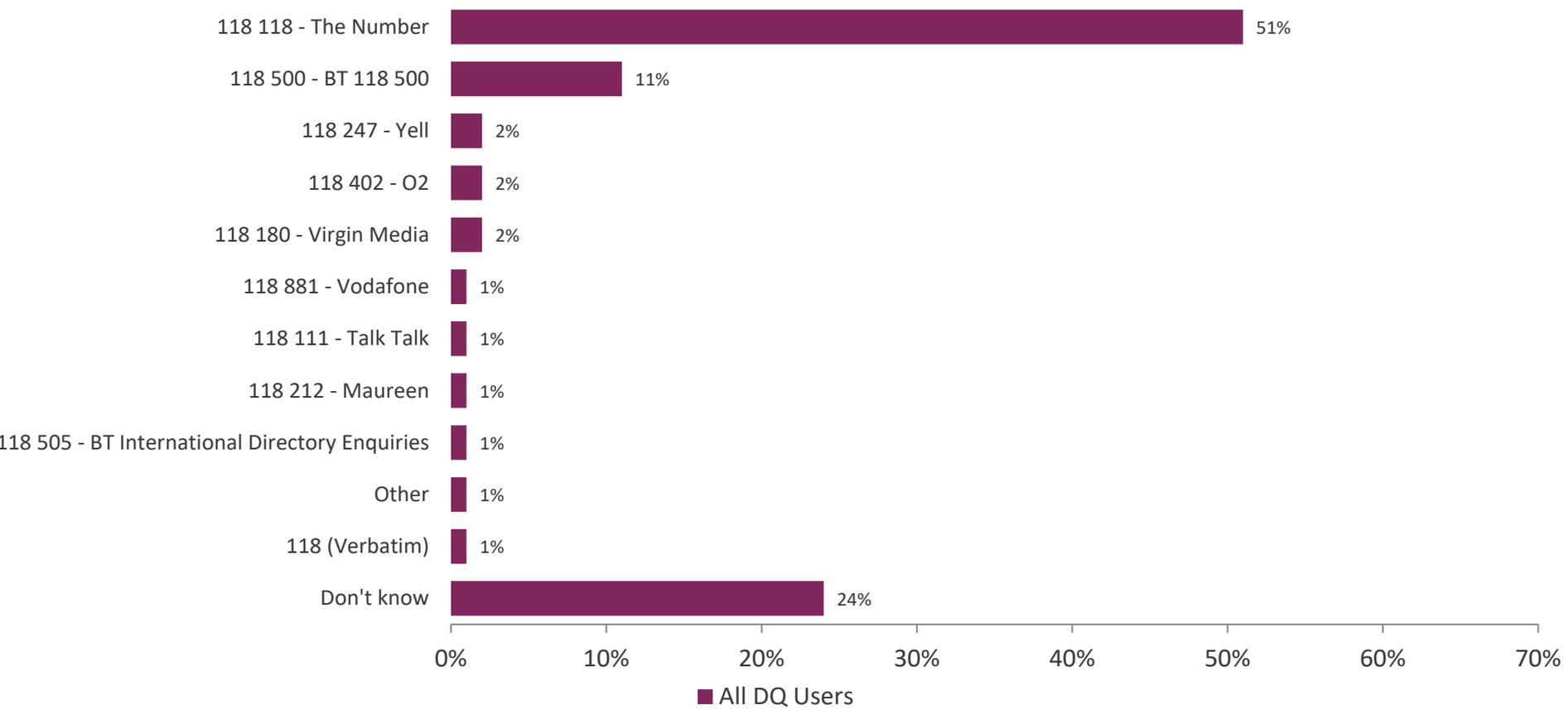
Question: Q28. Which directory enquiry services are you aware of? Unprompted into code frame. Multi-code

Base: All personal DQ Users (326).



'118 118 The Number' is the most used 118 DQ service, but about a quarter of DQ users could not recall unprompted which they had used

DQ service used on last call (unprompted) – Personal DQ Users (n=326)

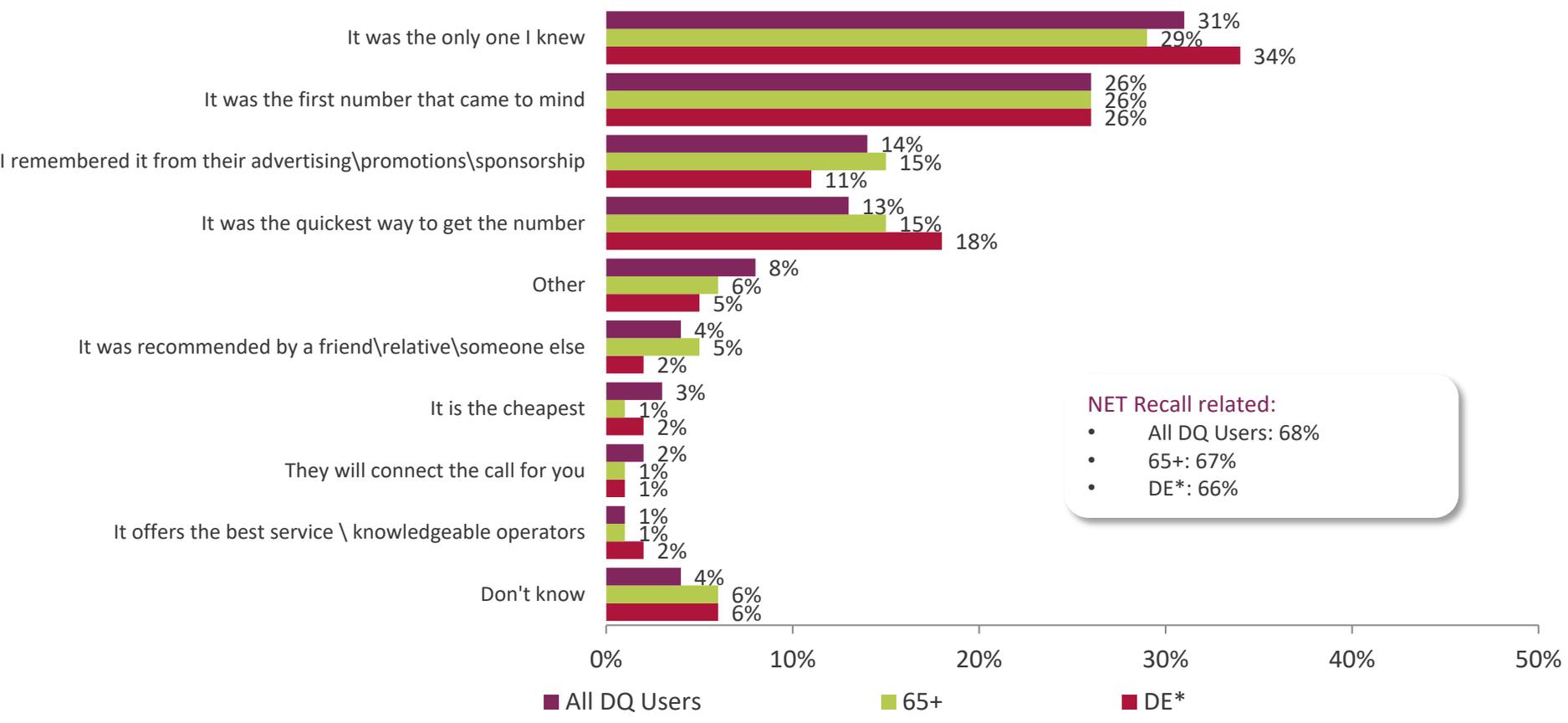


Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+
Question: Q8. Which directory enquiry service did you use on that occasion? Unprompted into code frame. Single-code
Base: All personal DQ Users (326)



Majority of DQ users call the 118 DQ service number that comes first to mind, or is the only one they know

Reason for DQ service used on last call – Personal DQ Users who know which number they called (N=246)



Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

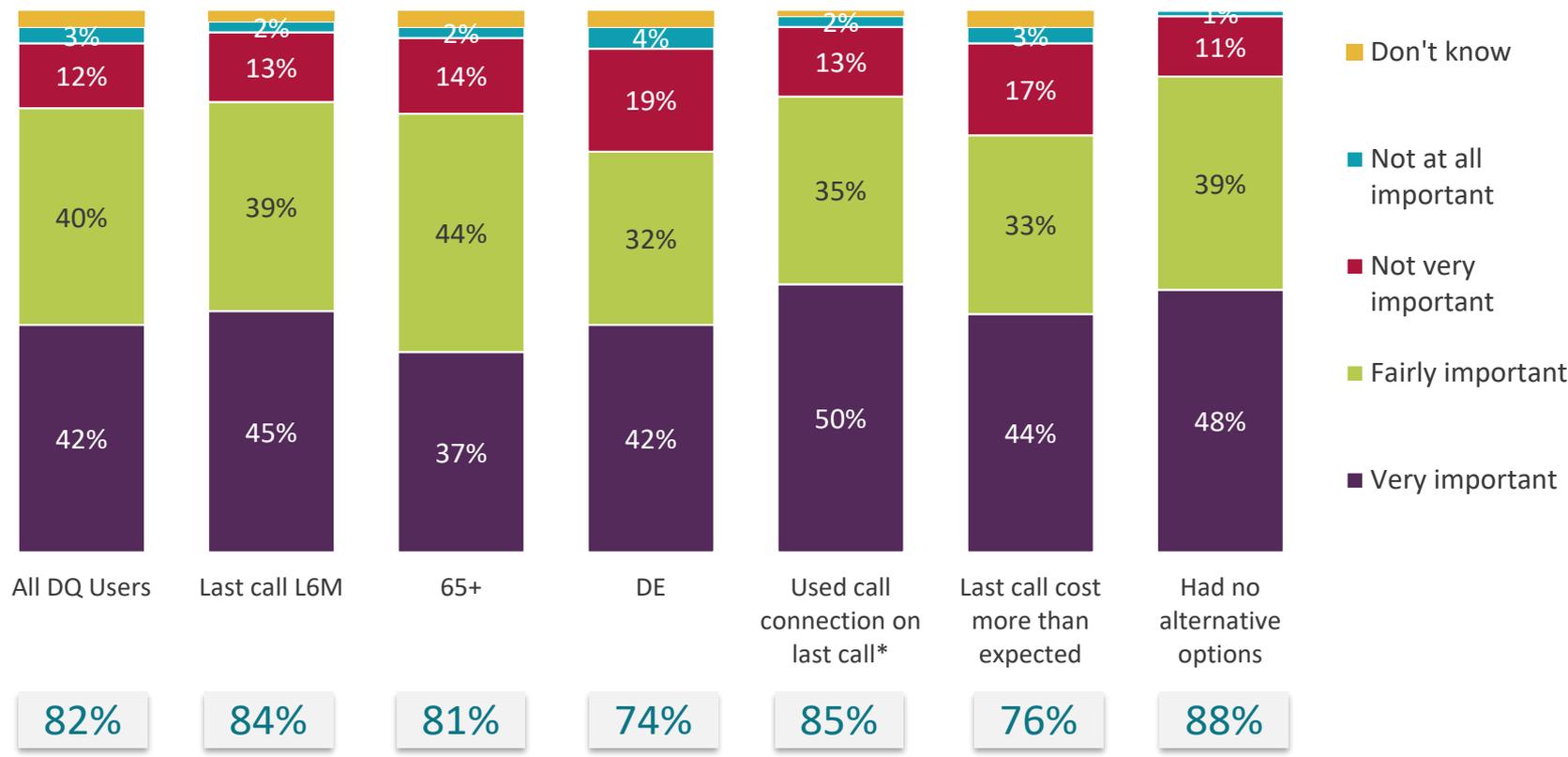
Question: Q9. Why did you decide to use that specific directory enquiry service on that occasion? Prompted. Multi-code

Base: All personal DQ Users who know which number they called (246); 65+ (107); DE* (94) *Caution: base size under 100, treat as indicative only



8-in-10 DQ users said it was important they received the telephone number they were looking for, at the time they requested it

Importance of receiving telephone number, at the time they requested it – Personal DQ Users (N=326)



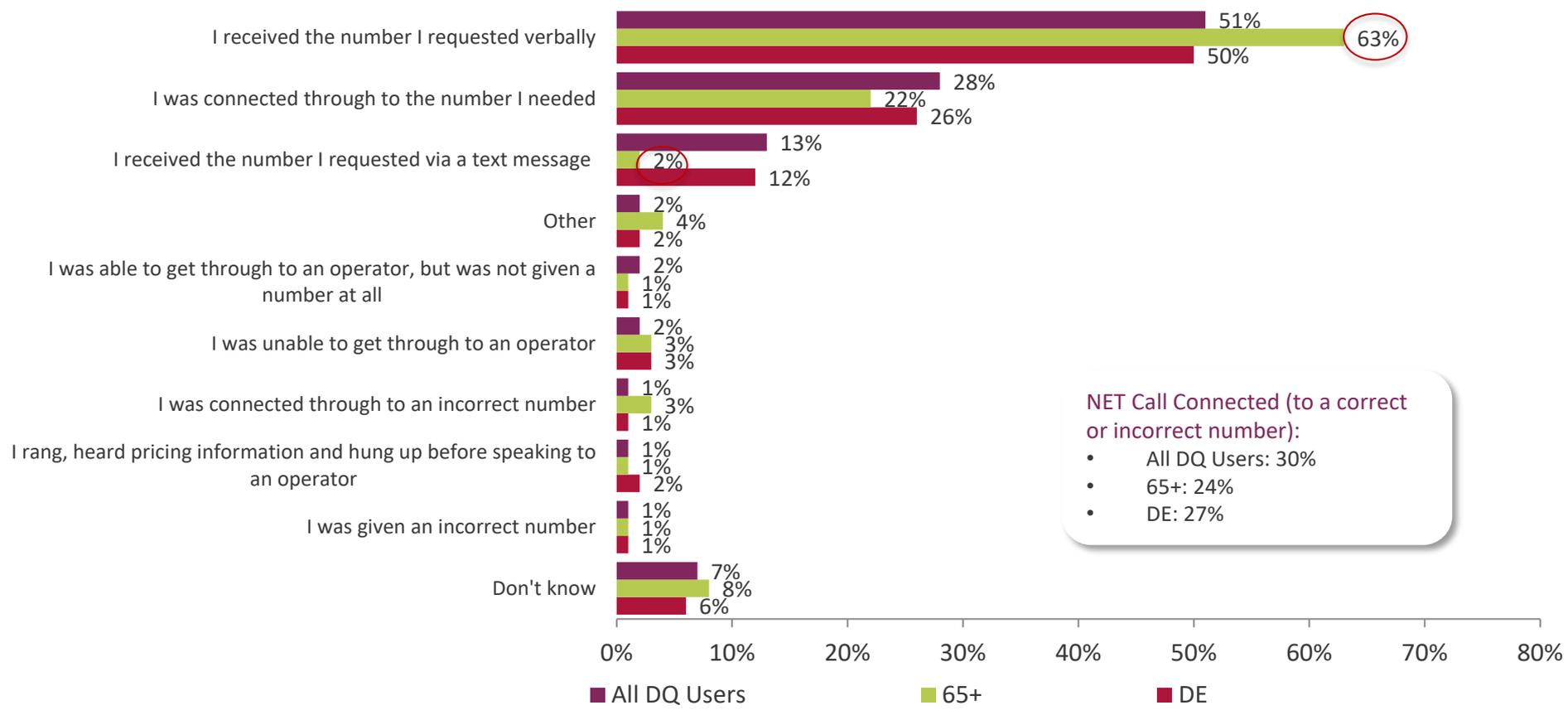
Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q10. On this occasion, how important was it that you received the telephone number you were looking for, at the time you requested it? Prompted. Single-code

Base: All personal DQ Users (326); Last call L6M (201); 65+ (150); DE (121); Used call connection on last call* (90); Last call cost more than expected (115); No alternative options (n=138) *Caution: base size under 100, treat as indicative only

The majority of DQ users (particularly 65+) received the number they requested verbally and three in ten (30%) used call connect

What happened on last call to 118 DQ services – Personal DQ Users (n=326)



Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

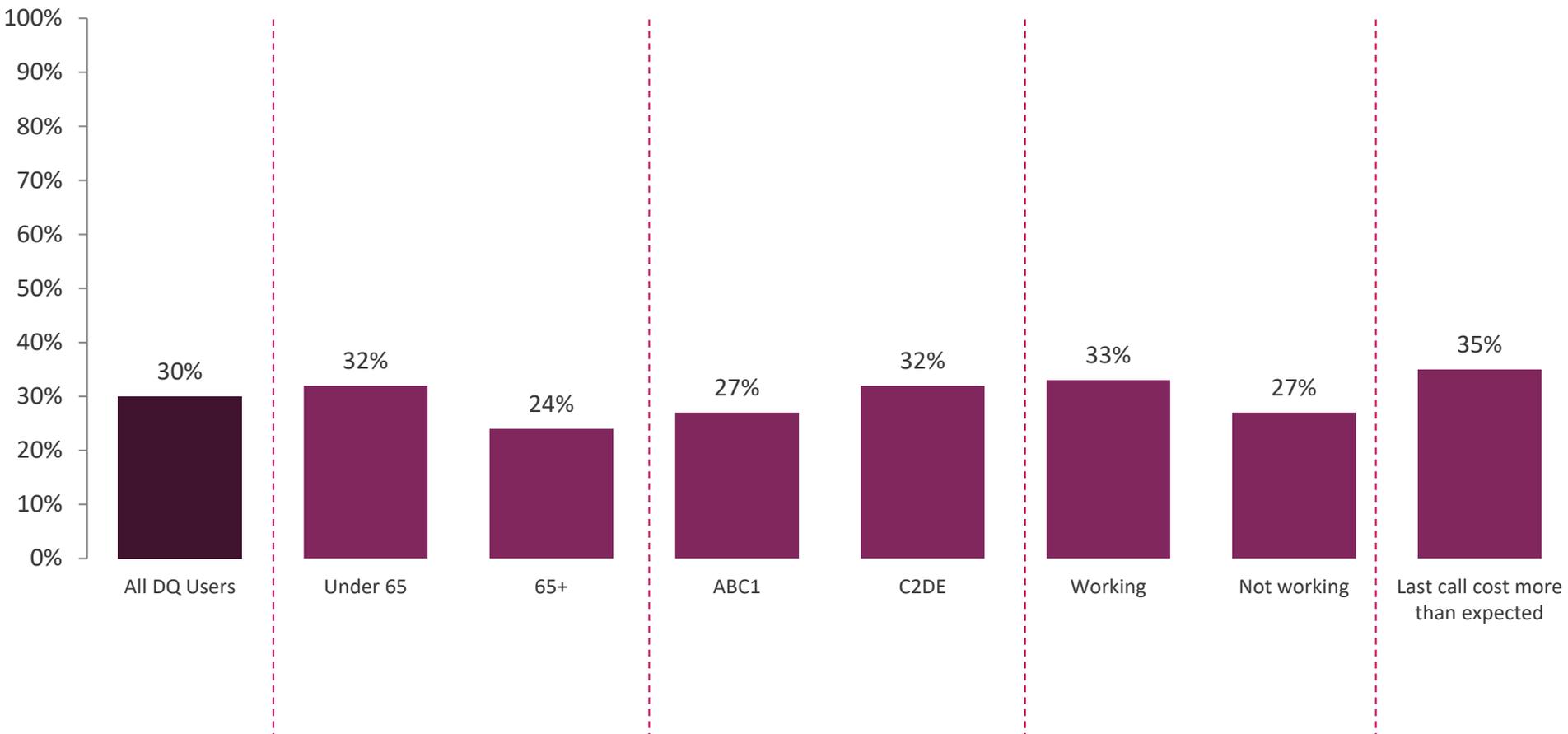
Question: Q11. Still thinking about the last time you made a call to a directory enquiry service, which of the below best describes your experience? Prompted. Multi-code

Base: All personal DQ Users (326); 65+ (150); DE (121)

Note: The net proportion using call connect stands at 31% among more recent DQ users (i.e. used in the last 3 months – base 130).

Three in ten DQ users used call connection on their last call to 118 DQ services

Percentage of DQ Users who used call connect on their last call – Personal DQ Users (n=326)



Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

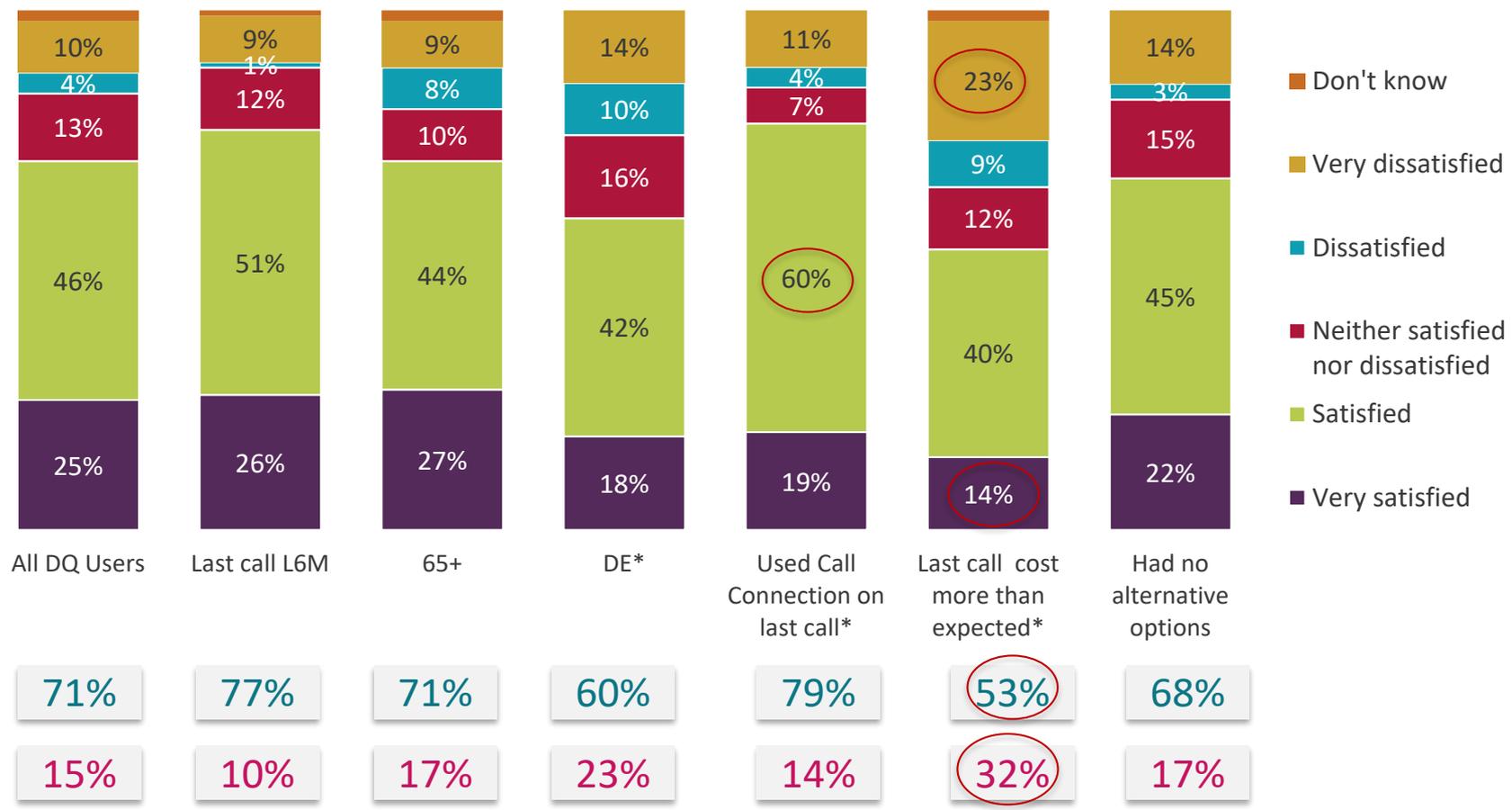
Question: Q11. Still thinking about the last time you made a call to a directory enquiry service, which of the below best describes your experience? Incidence of call connect includes all calls using this service i.e. those connected to a correct or incorrect number. Prompted. Multi-code

Base: All personal DQ Users (326); Under 65 (179); 65+ (150); ABC1 (146); C2DE (180); Working (118); Not Working (208); Last call cost more than expected (115)



7-in-10 users were satisfied with their last experience of calling DQ – falling to 53% for those who had a call which cost more than expected

Satisfaction with last experience of calling a 118 DQ service – Personal DQ Users (n=255)



Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q12A. And overall, how satisfied were you with your last experience of calling a directory enquiry service? Prompted. Single-code

Base: Waves 2-6 Only. All personal DQ Users (255); Last call L6M (160); 65+ (117); DE* (91); Used call connection on last call* (75); Last call cost more than expected* (94); No alternative options (112)

* Caution: base size under 100, treat as indicative only

Participants do not necessarily consider the call charges when rating their levels of satisfaction

Most of the qualitative participants (7 out of 10) rated the service experience as satisfactory but had strong negative attitudes towards the call charges received

- During the qualitative sessions, participants explained feeling negative about the cost of the call charges and yet many of these participants reported to be *satisfied* or *very satisfied* with the service experience on the survey
- Often the call was important and / or urgent and getting the number they need when there seems to be no other easy way to do this can be a relief at the time
- However, all the participants reacted negatively to the cost of the call and described having ‘bill shock’ to varying degrees
- The qualitative evidence suggests that it is possible those who answered *satisfied* and *very satisfied* on the survey may have disassociated their view of the service received from the cost, and seemed to treat these as two different experiences.

“It’s a necessary evil. It’s expensive, but it’s good, the people are quite helpful and pleasant.” [Male, South, 71-75, C1].”

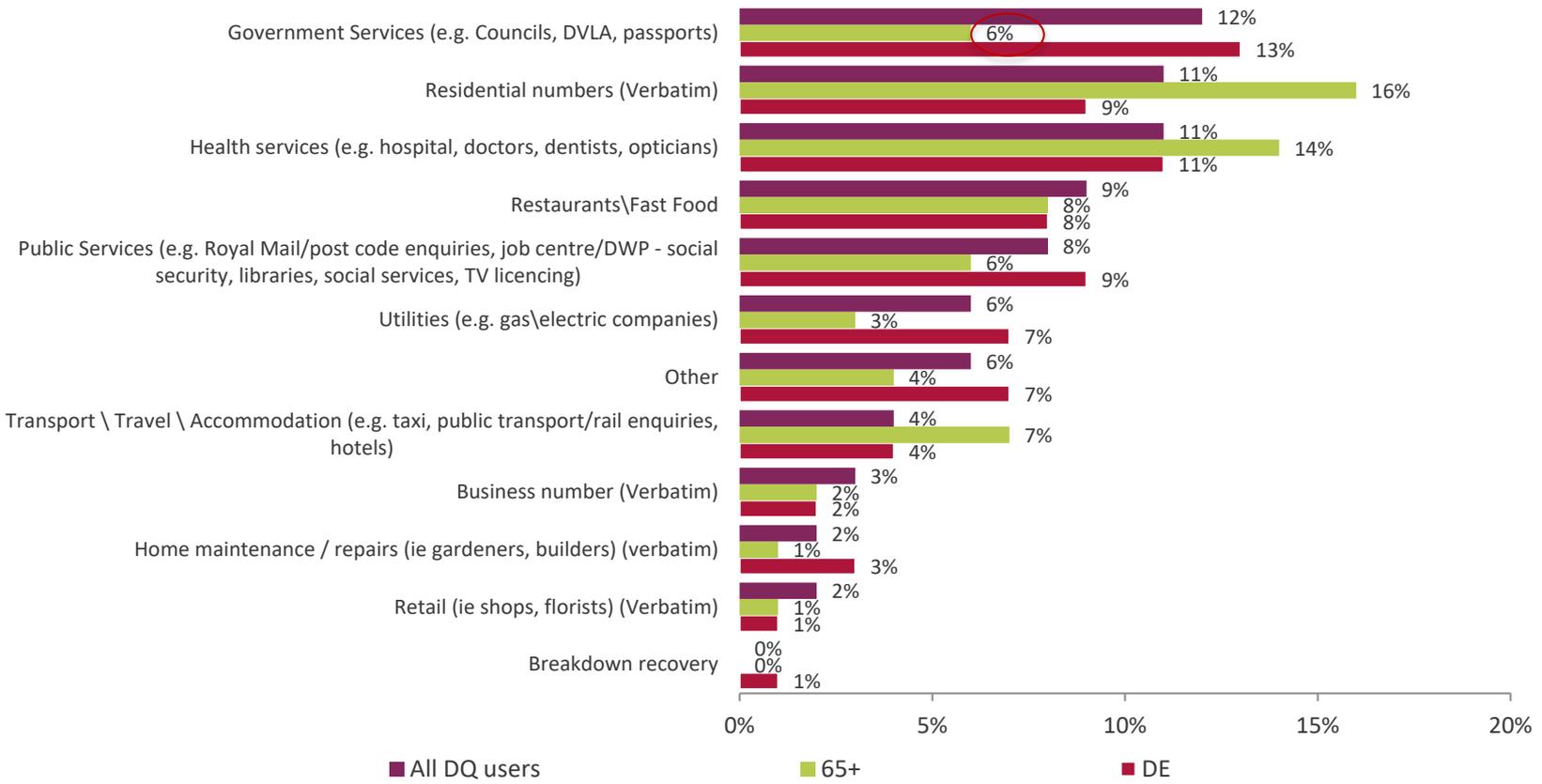
“I asked for X and I got X, that’s probably why I might have put satisfied.” [Male, N Ireland, 61-65, C1].”

“They gave us a service and that’s their charge. They give you the number really quickly. The service they give you is good.... It’s just very expensive.” [Female, Midlands, 61-65, C1]



DQ users were looking for a range of numbers when calling 118 DQ services.

118 DQ service sought on last call – Personal DQ Users (n=326)



27% of all DQ Users, 34% of 65+ and 27% of DE cannot recall what number they were looking for

Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

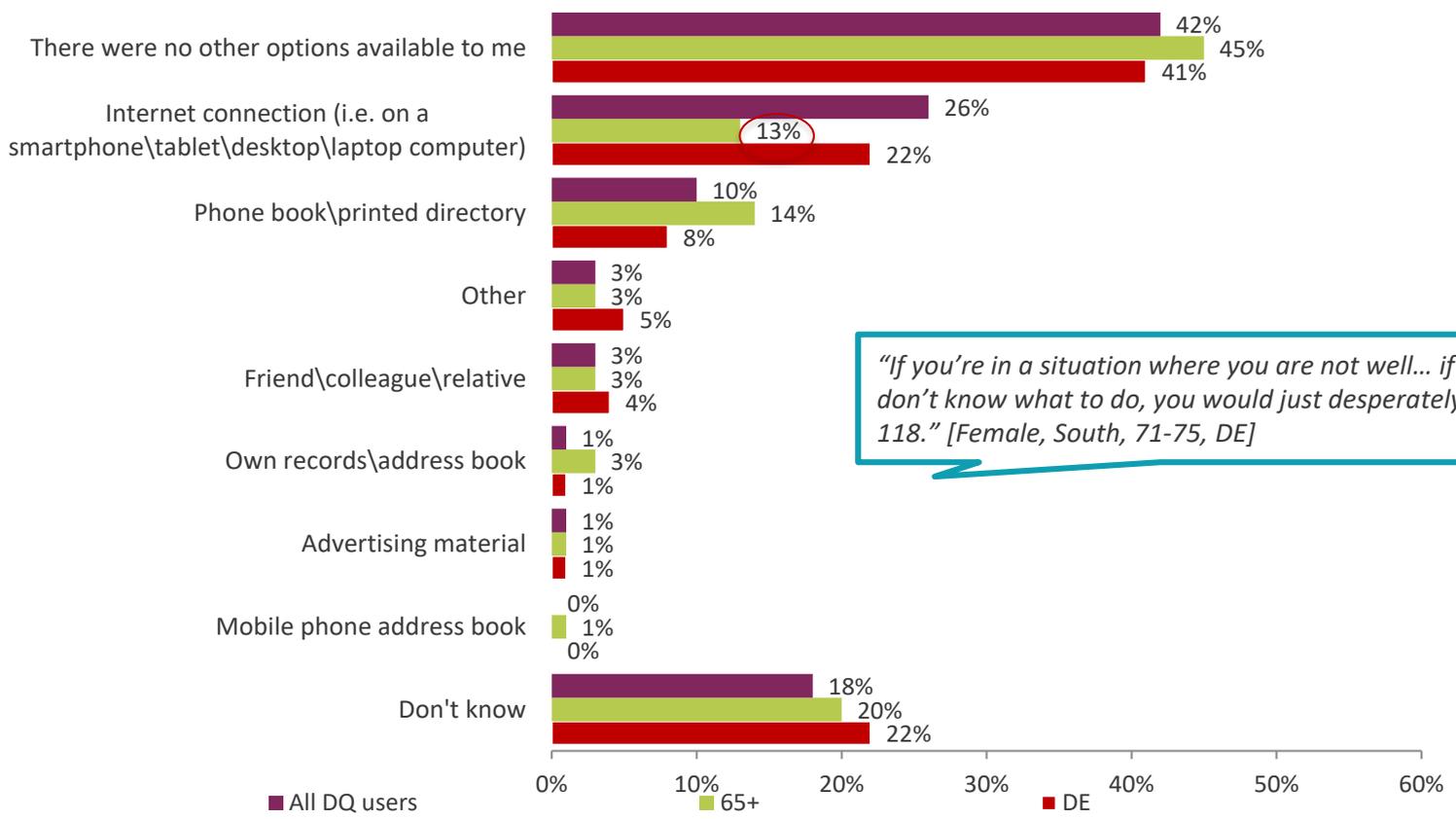
Question: Q13. What type of number were you looking for when you last made a call to a directory enquiry service? Unprompted into code frame. Multi-code

Base: All personal DQ Users (326), 65+ (150), DE (121)

Section 3: Alternatives to using 118 DQ services

4-in-10 DQ users believe they had no alternatives to calling DQ services. Those aged 65+ are less likely to have internet access as an alternative

Available alternatives to using 118 DQ services for last call – Personal DQ Users (n=326)



"If you're in a situation where you are not well... if you don't know what to do, you would just desperately call 118." [Female, South, 71-75, DE]

Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q14A. On that occasion, were there any other ways available to you to get the telephone number you needed rather than calling a directory enquiry service? Unprompted into code frame. Multi-code

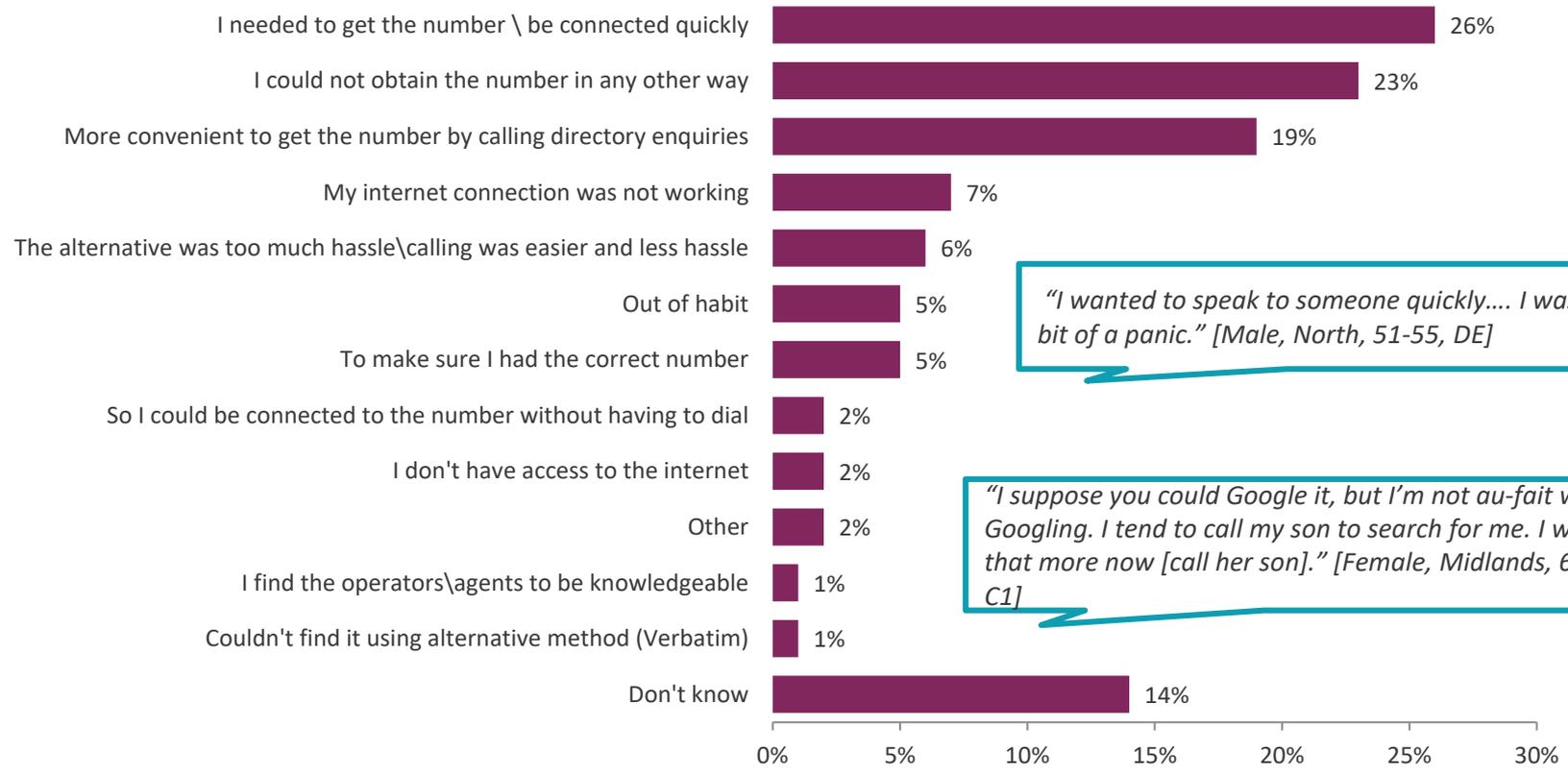
Base: All personal DQ Users (326); 65+ (150); DE (121).

Note: Among more recent (i.e. L3M) DQ users the proportion without access to an alternative stands at 43%, not significantly different to the 42%.



Over one quarter (26%) of DQ users who had alternative options, used DQ services because they needed the number quickly

Reasons why DQ users with alternative options used the service – Personal DQ Users with alternative options (N=128)



"I wanted to speak to someone quickly.... I was in a bit of a panic." [Male, North, 51-55, DE]

"I suppose you could Google it, but I'm not au-fait with Googling. I tend to call my son to search for me. I will do that more now [call her son]." [Female, Midlands, 61-65, C1]

Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q15. Why did you call a directory enquiry service to get the telephone number you were looking for instead of using an alternative method? Unprompted into code frame. Multi-code

Base: All personal Directory Enquiries users who had an alternative method (128).

Note: Kantar Media bespoke analysis: 43% of DQ users (in the last 12 months) gave a response at Q14b or Q15 that was consistent with a lack of alternative being available and a need to make the call at that time rather than defer. Relevant codes at Q14b (Why was there no alternative?): Not aware of alternative, No internet, No phonebook, Location-based (i.e. out of the house, in the car), In a rush/urgency, Number not available via alternative and for Q15 (Why call DQ and not use alternative?): Internet wasn't working, Couldn't find the number using alternative, No internet access. This analysis excludes 30 (27 weighted) respondents who said they had no alternative but were unable to provide further detail on why this was. If we include these respondents in the calculation the proportion without an alternative at the time stands at 53% (weighted figure).

There are a number of reasons why DQ users said they had no alternative options at the time of making the call to 118 DQ services

Why DQ users didn't have any other options – Verbatim responses – **Personal DQ Users without alternative options (N=138)**

"My internet was down at the time"

"Govt websites do not give numbers"

"Number wasn't in the phone book"

"I looked for it but could not find it"

"Didn't know where to look"

"I was out at the time"

"Could not find number online"

"I have not got a phone book"

"No internet on phone"

"I would have had to disturb another friend or family member"

Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

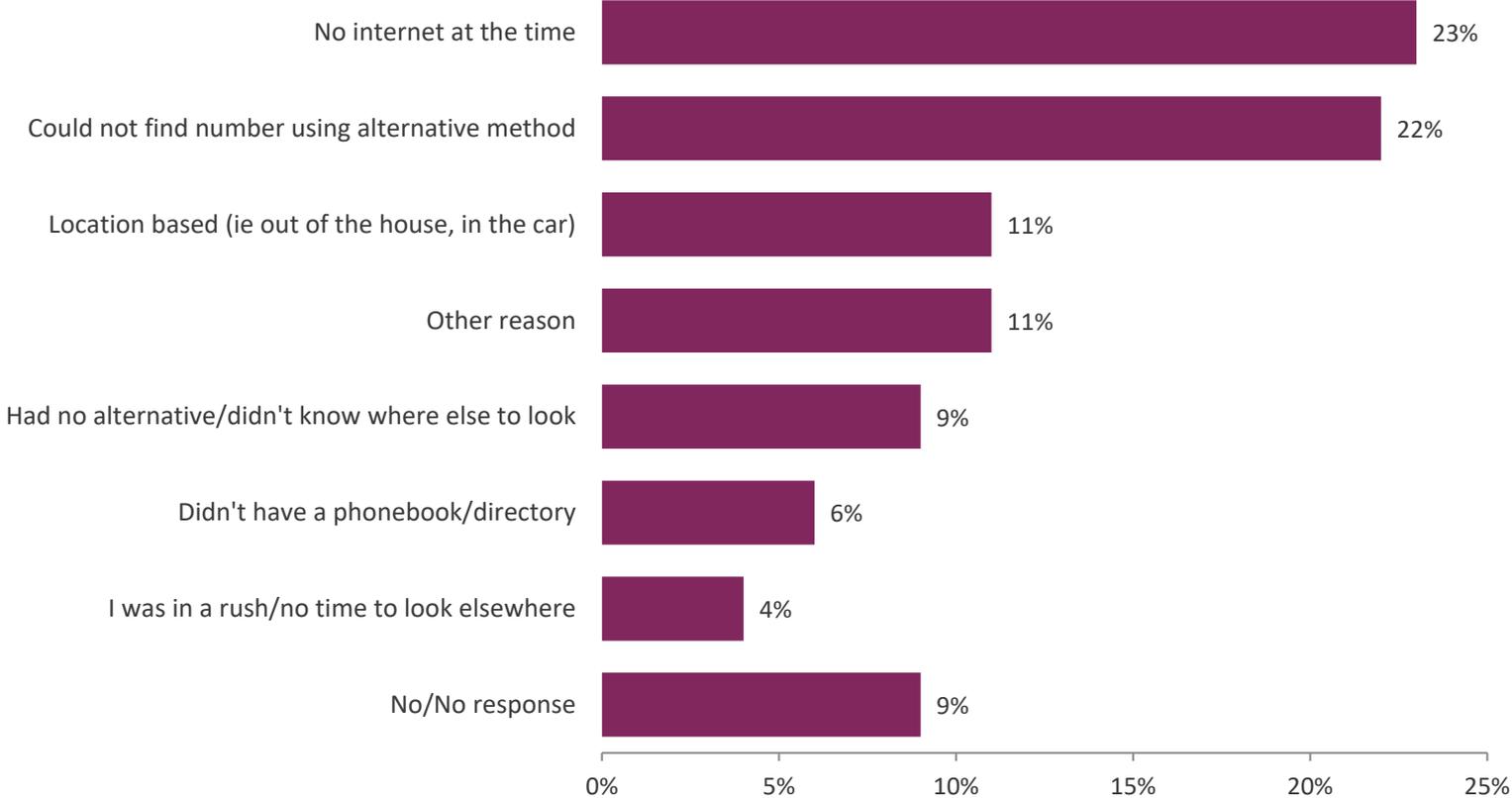
Question: Q14B. Can you tell me why there weren't any other options available to you? Open ended response

Base: All personal Directory Enquiry Users who didn't have any other options available (138)



Of DQ users who did not have other options, majority said they didn't have internet at the time, or that they couldn't find the number using alternatives

Why DQ users didn't have any other options (Coded verbatim responses) – Personal DQ Users without alternative options (N=138)



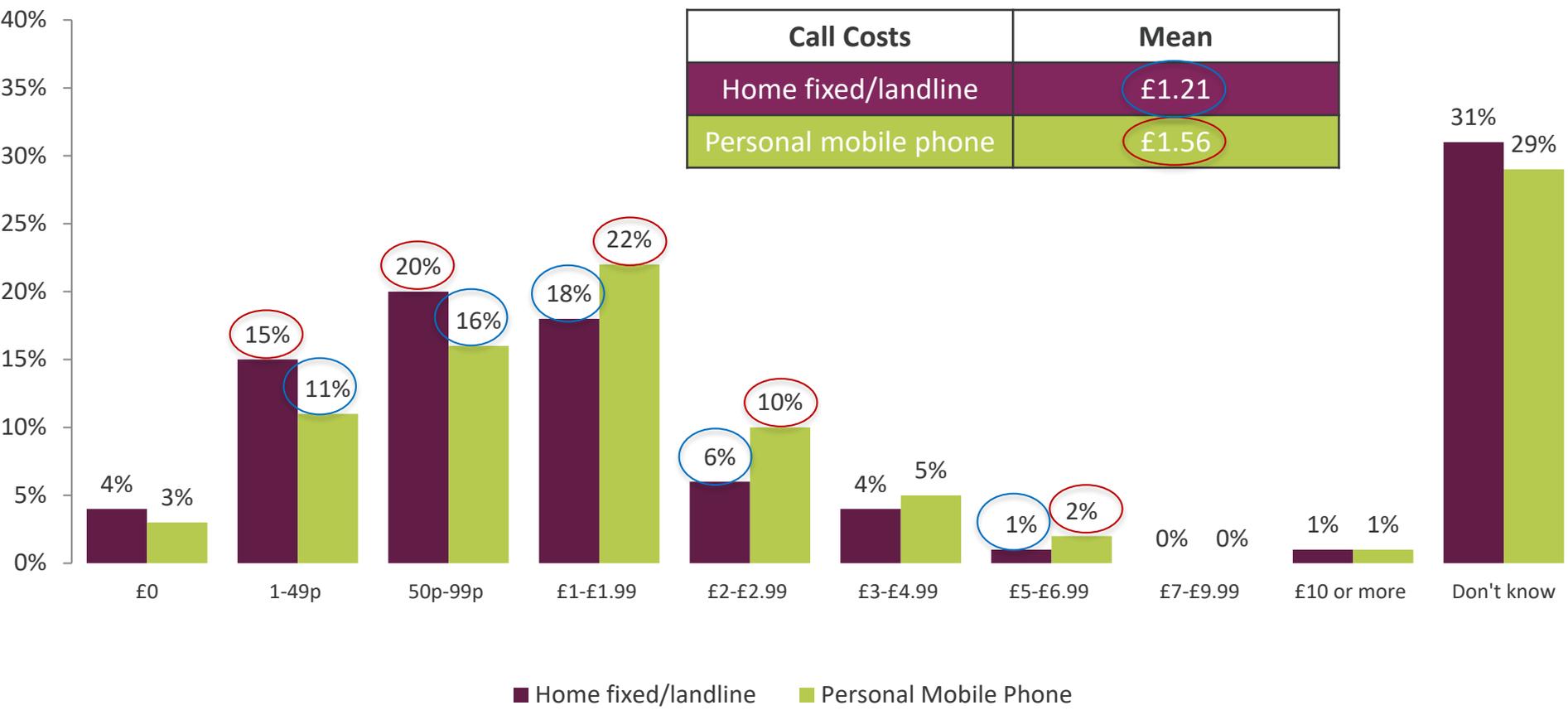
Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+
 Question: Q14B. Can you tell me why there weren't any other options available to you? Coded verbatim response
 Base: All personal Directory Enquiry Users who didn't have any other options available (138)
 Note: Kantar Media bespoke analysis: 43% of DQ users (in the last 12 months) gave a response at Q14b or Q15 that was consistent with a lack of alternative being available and a need to make the call at that time rather than defer. Relevant codes at Q14b (Why was there no alternative?): Not aware of alternative, No internet, No phonebook, Location-based (i.e. out of the house, in the car), In a rush/urgency, Number not available via alternative and for Q15 (Why call DQ and not use alternative?): Internet wasn't working, Couldn't find the number using alternative, No internet access. This analysis excludes 30 (27 weighted) respondents who said they had no alternative but were unable to provide further detail on why this was. If we include these respondents in the calculation the proportion without an alternative at the time stands at 53% (weighted figure).

Section 4: Knowledge and expectations of call costs



In general, UK adults 16+ believe calling 118 DQ services from a home/fixed landline is cheaper than calling from a mobile phone

Cost of call to 118 DQ services from a home fixed/landline and personal mobile phone – All UK Adults 16+ (n=2,129)



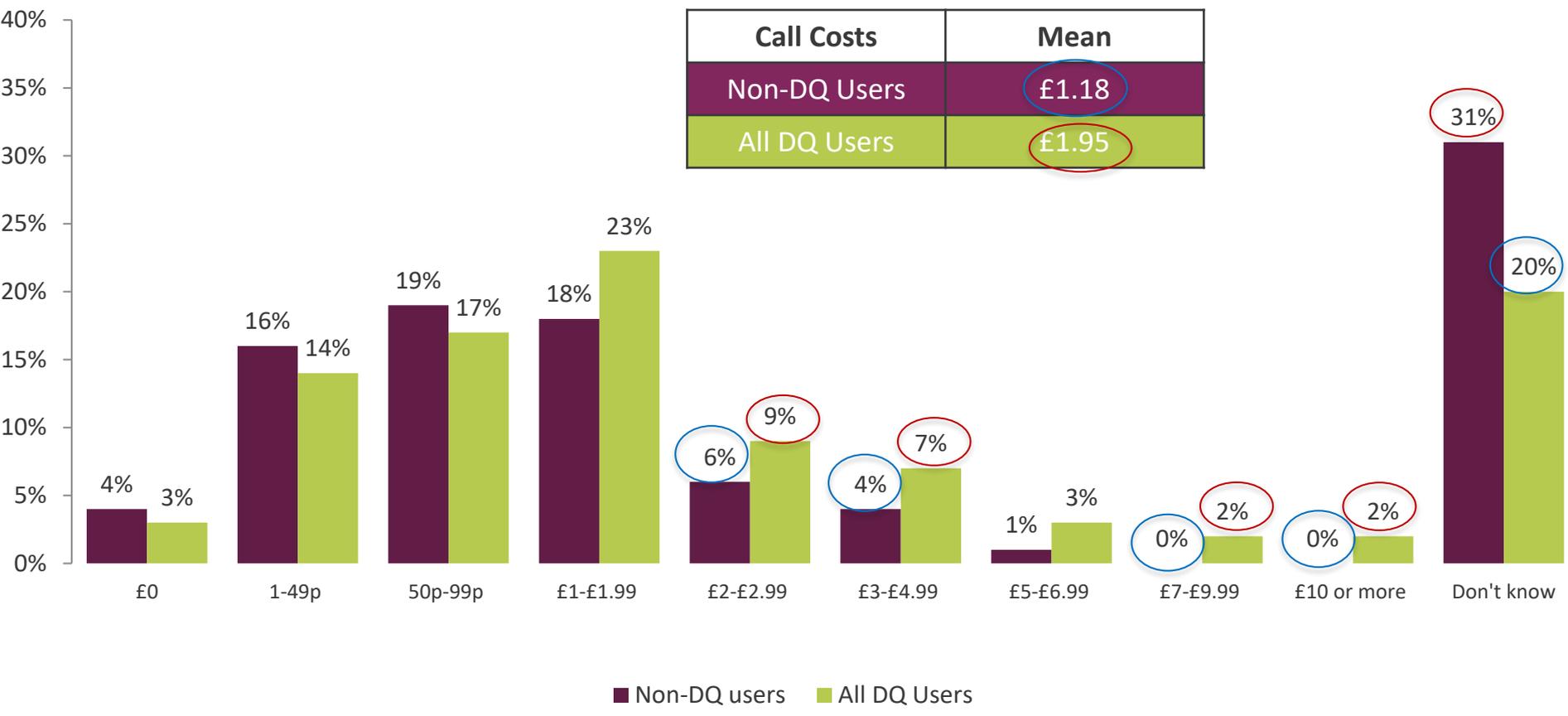
Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+. Wave 1 Data Only.

Question: Q3a/b Can you tell me approximately how much you think it costs to call a 118 directory enquiry service from a [personal mobile]/[home fixed/landline] phone? This is for a call that would last just under 1 minute. Numeric response. Q3ai/Q3bi. (asked to those who 'don't know' at Q3a/Q3b) Using this list approximately how much do you think it costs to call a 118 directory enquiry service from a [personal mobile]/[home fixed/landline] phone? This would be for a call that would last just under 1 minute. Combined numeric and prompted response shown. Mean calculated by using numeric response from Q3a/Q3b and mid-points from Q3ai/Q3bi. £10 or more was assigned the numeric value of 10. Base: All Adults 16+ (2,129). Base sizes for means (excl. don't know): Personal mobile phone (1,484); home fixed/landline (1,462). No outliers excluded from wave 1 data.



A fifth of DQ users did not know the cost of a 1 minute or less call to a DQ service from a home landline/fixed phone

Cost of call to 118 DQ services from a home fixed/landline – Personal DQ Users (n=326) and Non-DQ users (n=2,040)



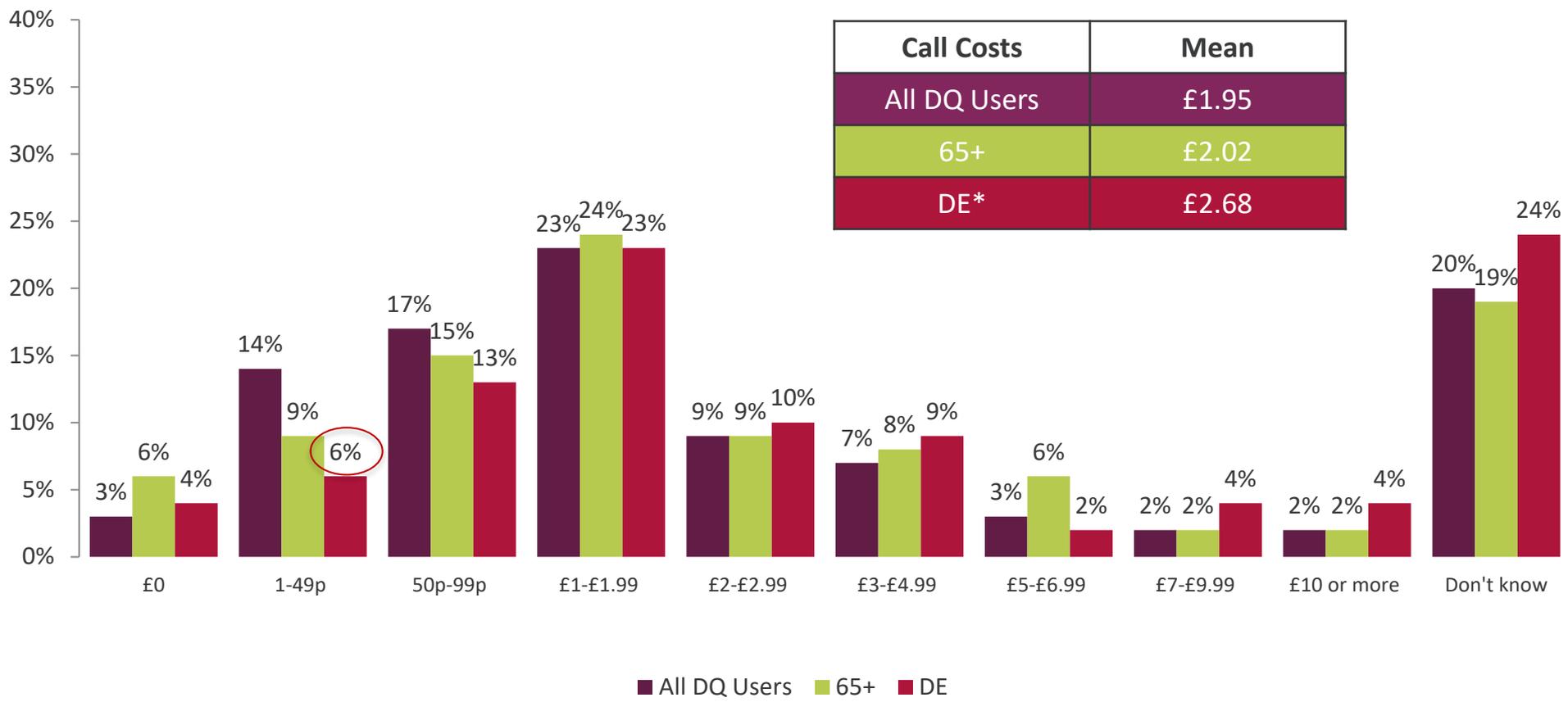
Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+.

Question: Q3b Can you tell me approximately how much you think it costs to call a 118 directory enquiry service from a home fixed/landline phone? This is for a call that would last just under 1 minute. Numeric response. Q3bi. (asked to those who 'don't know' at Q3b) Using this list approximately how much do you think it costs to call a 118 directory enquiry service from a home fixed/landline phone? This would be for a call that would last just under 1 minute. Combined numeric and prompted response shown. Mean calculated by using numeric response from Q3b and mid-points from Q3bi. £10 or more was assigned the numeric value of 10. Base: All personal DQ users (326); non-DQ users (2040). Base sizes for means (excl. don't know): All DQ users (261), Non-DQ users (1,393). Note: If we exclude one outlier from the DQ user base the average estimated cost is £1.86.



A fifth of DQ users did not know the cost of a 1 minute or less call to a DQ service from a home landline/fixed phone

Cost of call to 118 DQ services from a home fixed/landline – Personal DQ Users (n=326)



Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+.

Question: Q3b Can you tell me approximately how much you think it costs to call a 118 directory enquiry service from a home fixed/landline phone? This is for a call that would last just under 1 minute. Numeric response. Q3bi. (asked to those who 'don't know' at Q3b) Using this list approximately how much do you think it costs to call a 118 directory enquiry service from a home fixed/landline phone? This would be for a call that would last just under 1 minute. Combined numeric and prompted response shown. Mean calculated by using numeric response from Q3b and mid-points from Q3bi. £10 or more was assigned the numeric value of 10. Base: All personal DQ users (326); 65+ (150); DE (121). Base sizes for means (excl. don't know). All DQ Users (261); 65+ (122); DE (91) *Caution: Base size under 100, treat as indicative only.

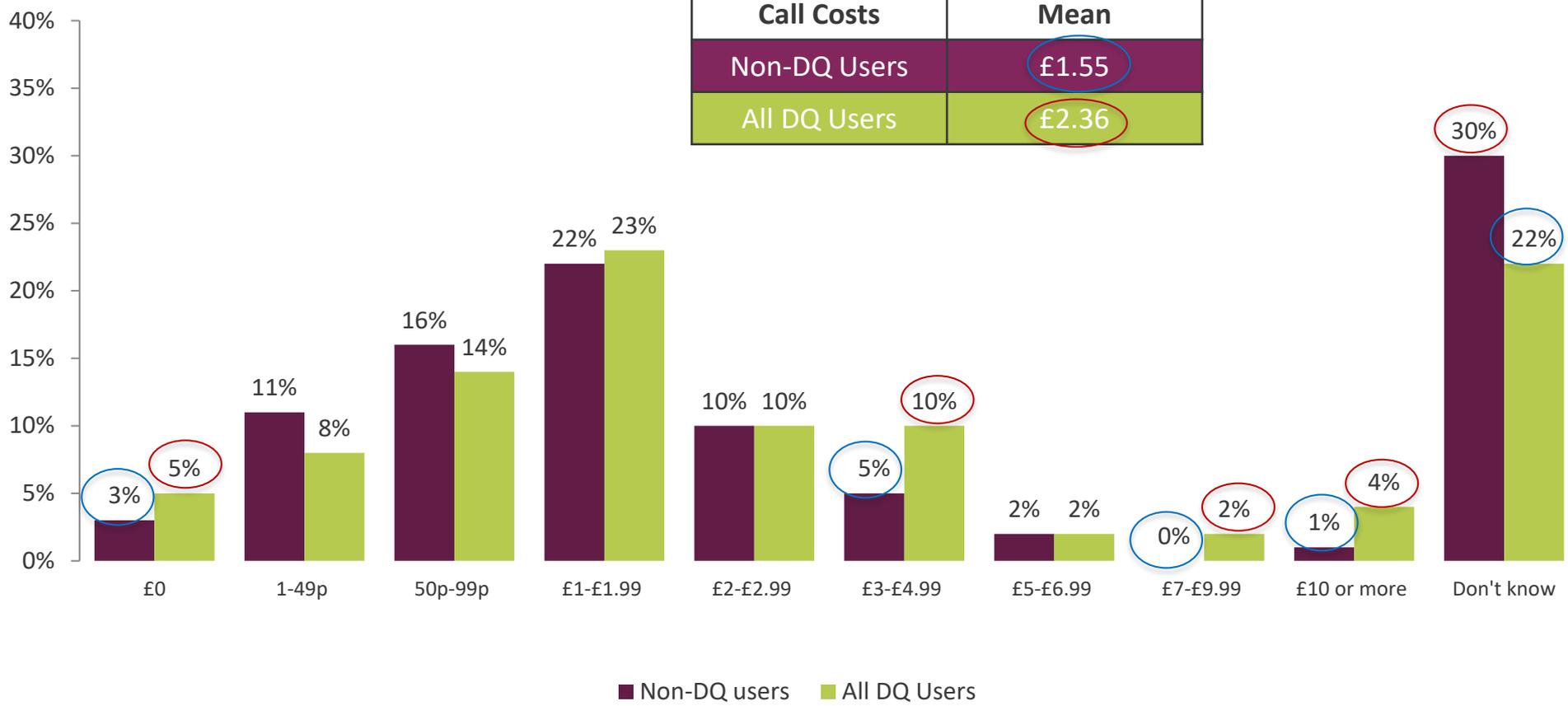
Note: If we exclude one outlier from the DQ user base and DE respondents base the average estimated cost stands at £1.86 among all DQ users. Mean estimated cost among more recent DQ users (i.e. used in the L3M) stands at £2.14 or £1.91 if we exclude the outlier.



On average, DQ users think a call to 118 DQ services from a personal mobile phone is higher than non-DQ users

Cost of call to 118 DQ services from a personal mobile phone – Personal DQ Users (n=326) and Non-DQ Users (n=2,040)

Call Costs	Mean
Non-DQ Users	£1.55
All DQ Users	£2.36



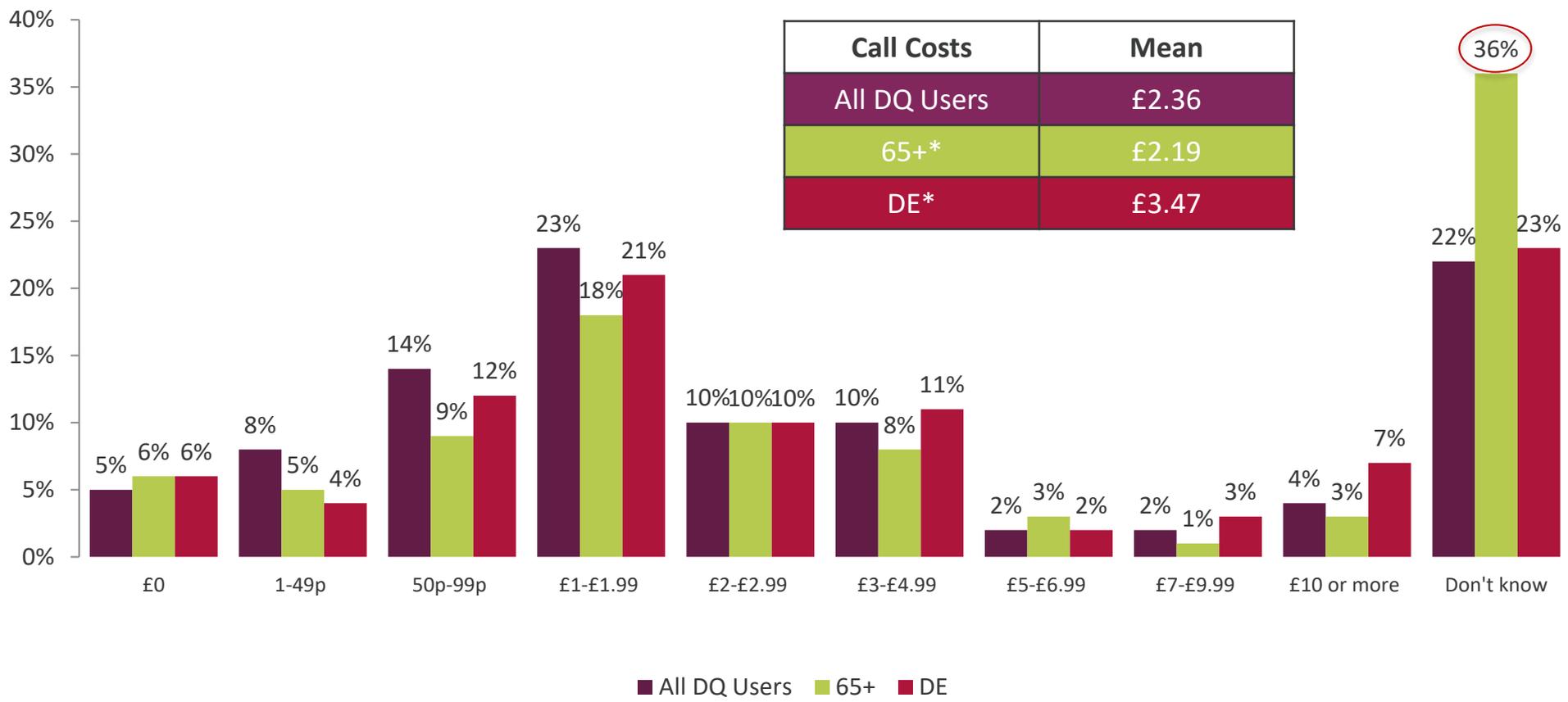
Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q3a Can you tell me approximately how much you think it costs to call a 118 directory enquiry service from a personal mobile phone? This is for a call that would last just under 1 minute. Numeric response. Q3ai. (asked to those who 'don't know' at Q3a) Using this list approximately how much do you think it costs to call a 118 directory enquiry service from a personal mobile phone? This would be for a call that would last just under 1 minute. Combined numeric and prompted response shown. Mean calculated by using numeric response from Q3a and mid-points from Q3ai. £10 or more was assigned the numeric value of 10. Base: All personal DQ users (326); non-DQ users (2040). Base sizes for means (excl. don't know) Non-DQ users (1,414); All DQ Users (245).
 Note: If we exclude one outlier from the DQ user base the estimated cost stands at £2.17.



DQ users aged 65+ are less likely to know how much a call to 118 DQ services costs when calling from a personal mobile phone

Cost of call to 118 DQ services from a personal mobile phone – Personal DQ Users (n=326)



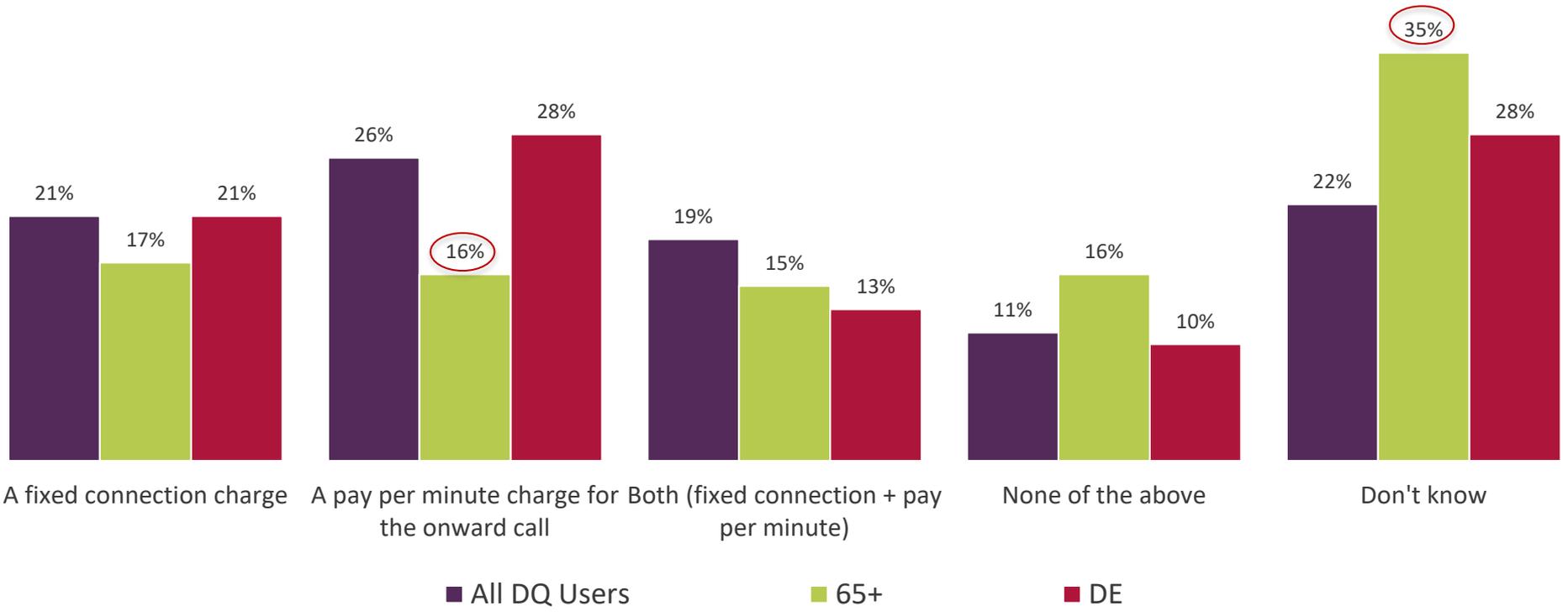
Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q3a Can you tell me approximately how much you think it costs to call a 118 directory enquiry service from a personal mobile phone? This is for a call that would last just under 1 minute. Numeric response. Q3ai. (asked to those who 'don't know' at Q3a) Using this list approximately how much do you think it costs to call a 118 directory enquiry service from a personal mobile phone? This would be for a call that would last just under 1 minute. Combined numeric and prompted response shown. Mean calculated by using numeric response from Q3a and mid-points from Q3ai. £10 or more was assigned the numeric value of 10. Base: All personal DQ users (326); 65+ (150); DE (121). Base sizes for means (excl. don't know): All DQ Users (245); 65+ (96); DE (90) *Caution: Base size under 100, treat as indicative only.

Note: If we exclude one outlier from the DQ user base (also in the DE respondent base) the estimated cost stands at £2.17 among DQ users. Mean estimated cost among more recent DQ users (i.e. used in the L3M) stands at £2.53 and £2.03 if we remove the outlier.

There is low understanding about how call connection is priced, particularly with DQ users aged 65+

Understanding of how call connection is priced - Personal DQ Users (n=326)



Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

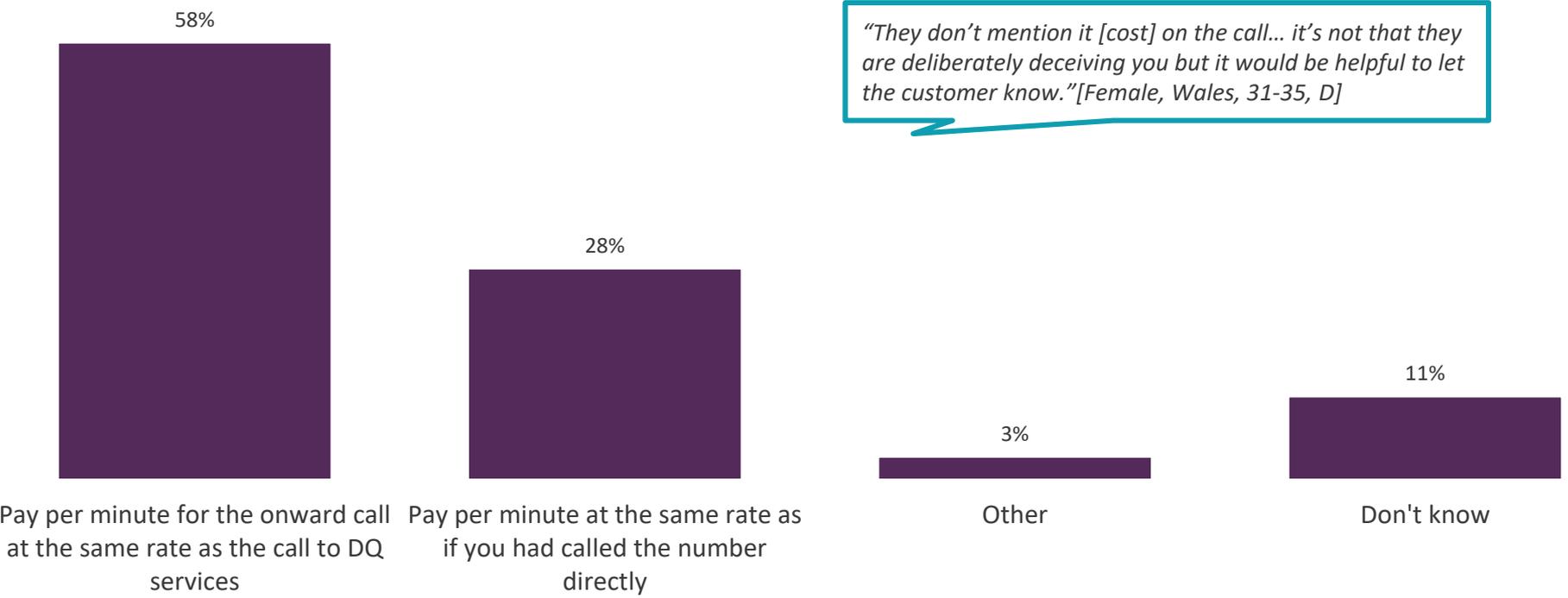
Question: Q4A Some directory enquiry services provide an onward call connection. In other words, if you choose to use the onward call connection service you are put through to the number you asked for. Which one of the following do you think applies to using an onward call connection service? Prompted. Single-code

Base: All personal DQ Users (326); 65+ (150); DE (121)



Almost 3-in-5 DQ users who are aware there is a pay-per-minute charge believe it is costed at the same rate as the call to 118 DQ services

Understanding of how pay-per-minute is priced – Personal DQ Users who know there is a pay-per-minute charge (n=137)



"They don't mention it [cost] on the call... it's not that they are deliberately deceiving you but it would be helpful to let the customer know."[Female, Wales, 31-35, D]

Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+
 Question: Q4B Which one of the following do you think applies to the per minute call charges once you have been connected to the number you requested? Prompted. Single-code
 Base: All personal DQ Users who know there is a pay-per-minute charge (137). This equates to 98% of all DQ users.

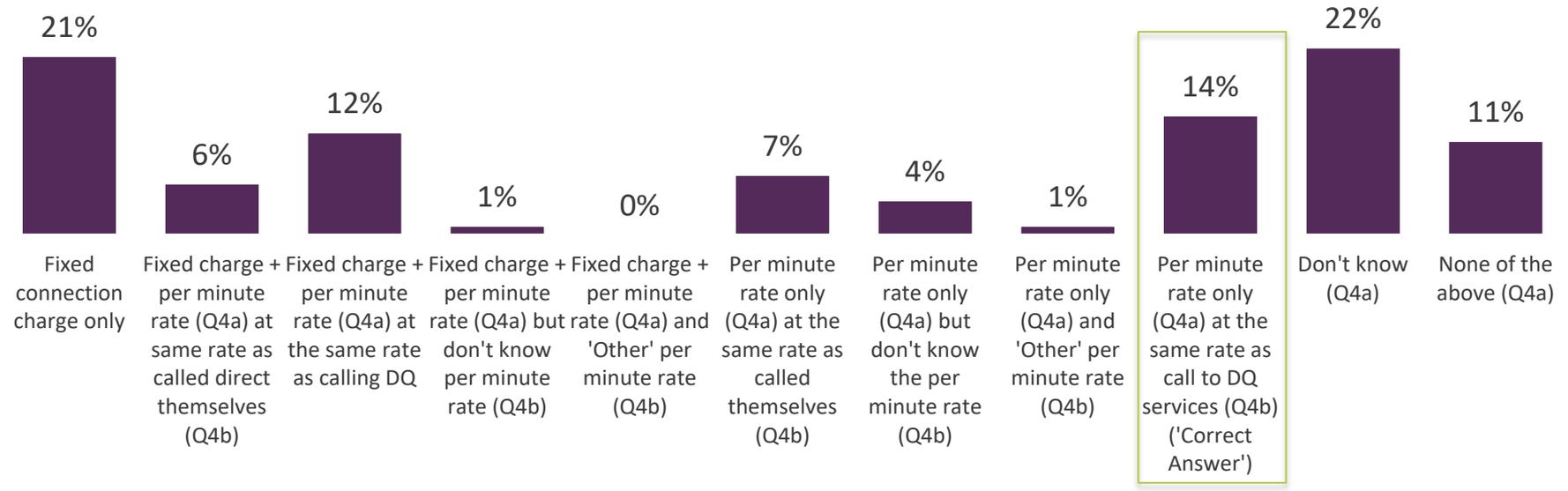


Overall, 1-in-7 (14%) DQ users were able to correctly identify how the 118 DQ call connection service is priced

Overall understanding of how call connection is priced - Personal DQ Users (n=326)

Q4a/Q4b	NET 'Correct' answer	NET Any Other answer
DQ Users	14%	86%
Call Connect Users L12M	19%	81%
Non Call Connect Users L12M	13%	87%
DQ Users L3M	16%	84%

'Correct' answer defined as: Per minute rate only (Q4a) and pay per minute for the onward call at the same rate as the call to DQ services (Q4b)
 Incorrect answer defined as: Any other responses/response combinations at Q4a/Q4b including don't know/none of the above as shown on chart below

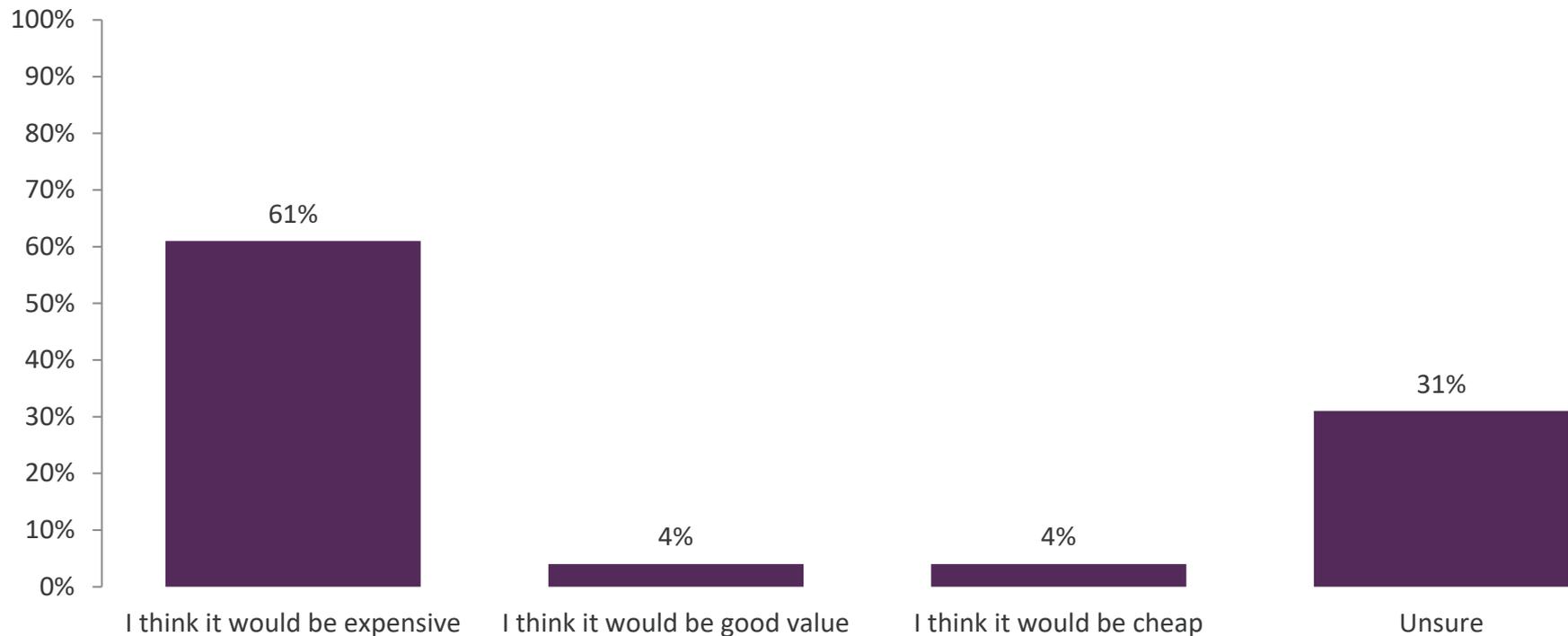


Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q4A Some directory enquiry services provide an onward call connection. In other words, if you choose to use the onward call connection service you are put through to the number you asked for. Which one of the following do you think applies to using an onward call connection service? Prompted. Single-code. Of those that think there is a pay-per-minute rate: Q4B Which one of the following do you think applies to the per minute call charges once you have been connected to the number you requested? Prompted. Single-code
 Base: All personal DQ Users (326); Call connect users L12M from Q5 (117); Non Call Connect Users L12M from Q5 (155); DQ users in the last 3 months (119).

Six out of ten DQ users who don't know how call connection is priced, expect it to be expensive

Perception of the cost of call connection – **Personal DQ Users who are unsure of the cost of call connection (n=95*)**



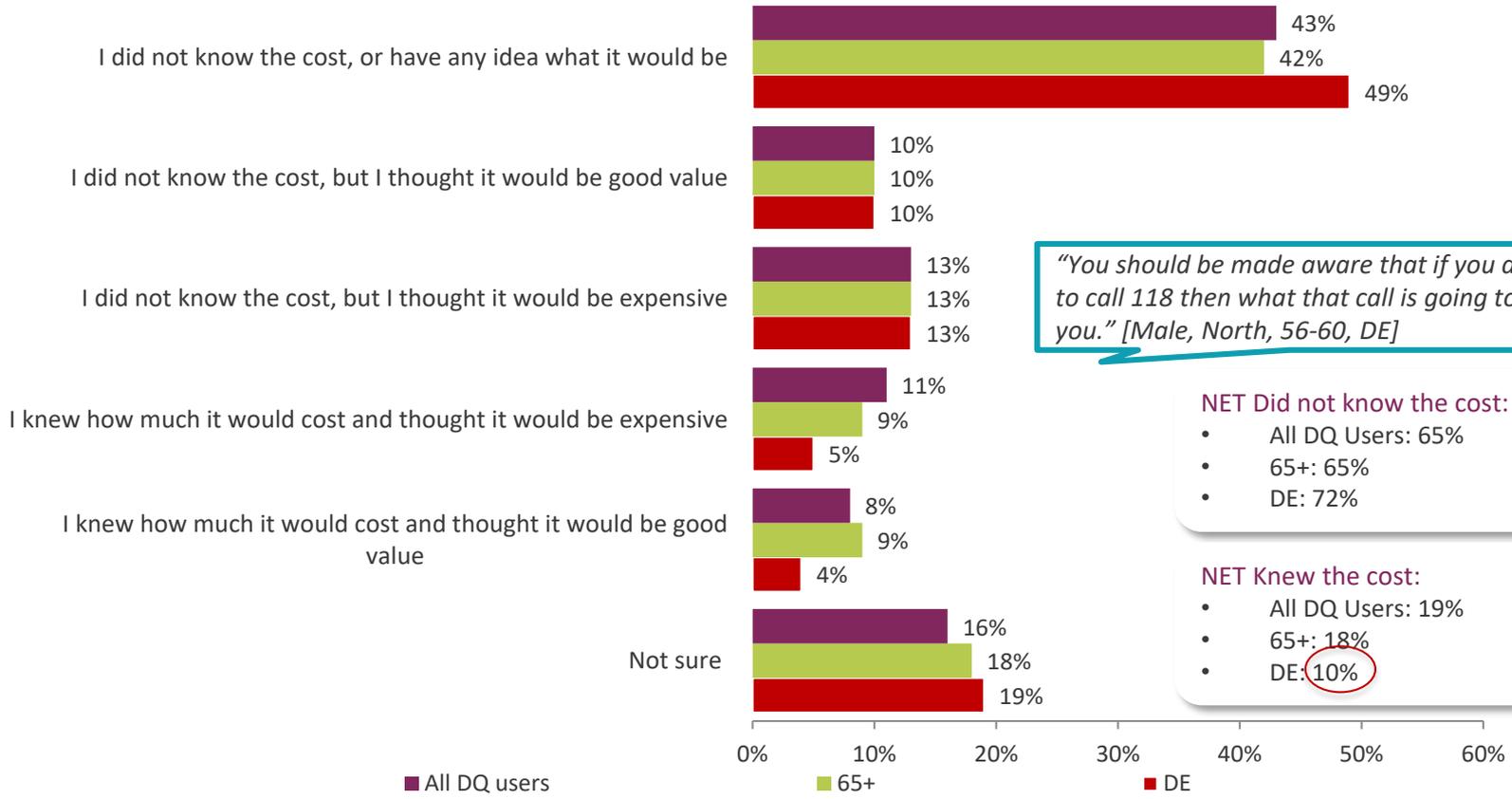
Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q4C Which of the following best describes what you know about the cost of using an onward call connection service through directory enquiries? Prompted. Single-code
Base: All personal Directory Enquiry Users who don't know about the cost of onward call connection at Q4a/Q4b (95*) *Caution: Base size under 100, treat as indicative only



2-in-10 DQ users said they knew the cost of their last call to 118 DQ services before making it, decreasing to 1-in-10 in the DE socio-economic group

Knowledge of the cost of the 118 DQ services call, before making it – Personal DQ Users (n=326)



"You should be made aware that if you are going to call 118 then what that call is going to charge you." [Male, North, 56-60, DE]

NET Did not know the cost:

- All DQ Users: 65%
- 65+: 65%
- DE: 72%

NET Knew the cost:

- All DQ Users: 19%
- 65+: 18%
- DE: 10%

Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

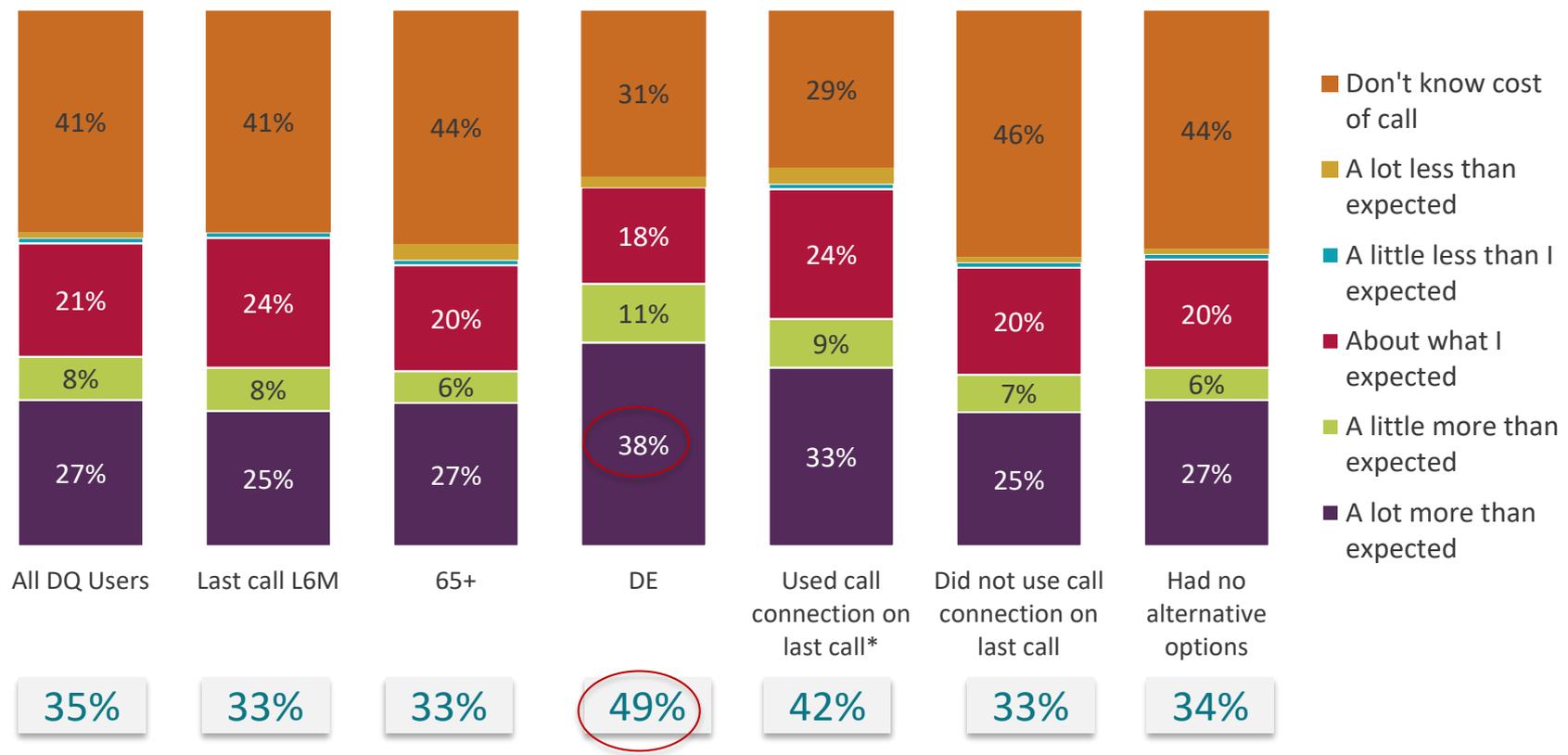
Question: Q16 On that occasion, which of the below best describes what you knew about the cost of calling the directory enquiry service before you made the call? Prompted. Single-code

Base: All personal DQ Users (326); 65+ (150); DE (121)



Over one third of DQ users say their last call to 118 DQ services was more than expected – rising to half among DE users

How the cost of their call compared to their expectations – **Personal DQ Users (n=326)**

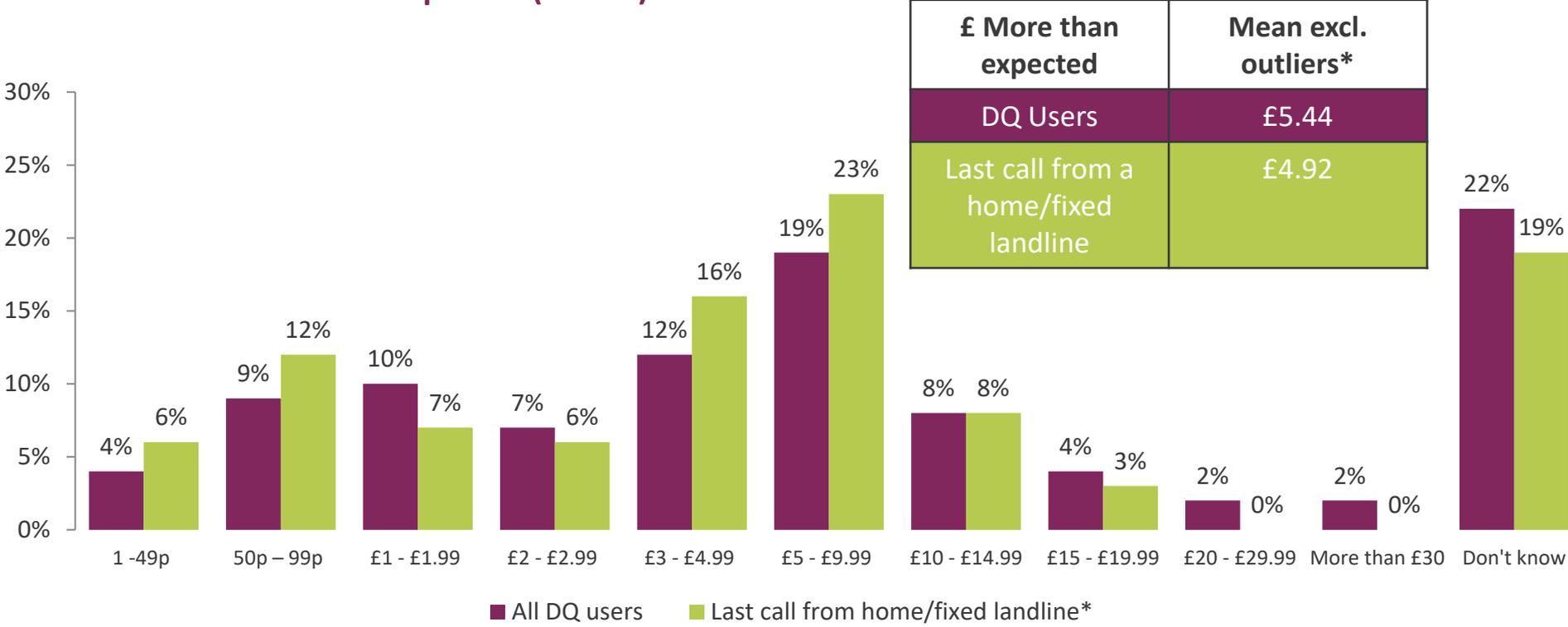


Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+, based on data from Waves 1-6
 Question: Q17 And after the call, how did the cost of this call compare to your expectations? Prompted. Single code
 Base: All personal DQ Users (326); Last call L6M (201); 65+ (150); DE (121); Used call connection on last call* (90); Did not use call connection on last call (236); Had no alternative options (138). *Caution: base under 100, treat as indicative only



Among those who said their last call to DQ services was more than expected, the average overspend was £5.44

How much more did the call to 118 DQ services cost than expected – **Personal DQ Users who said the cost of the call was more than expected (N=115)**



*Mean excl. outliers: Two respondents who were able to give a value, were treated as outliers. One respondent claimed their bill to be £90- £99.99 more than expected and the other respondent, £100+ more than expected. Both outliers were respondents who made calls to 118 DQ services from a personal mobile phone. While it is not believed that they are incorrect, given these two respondents provided extreme amounts, we have calculated the mean 'bill shock' with these two outliers removed from the data set.

Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

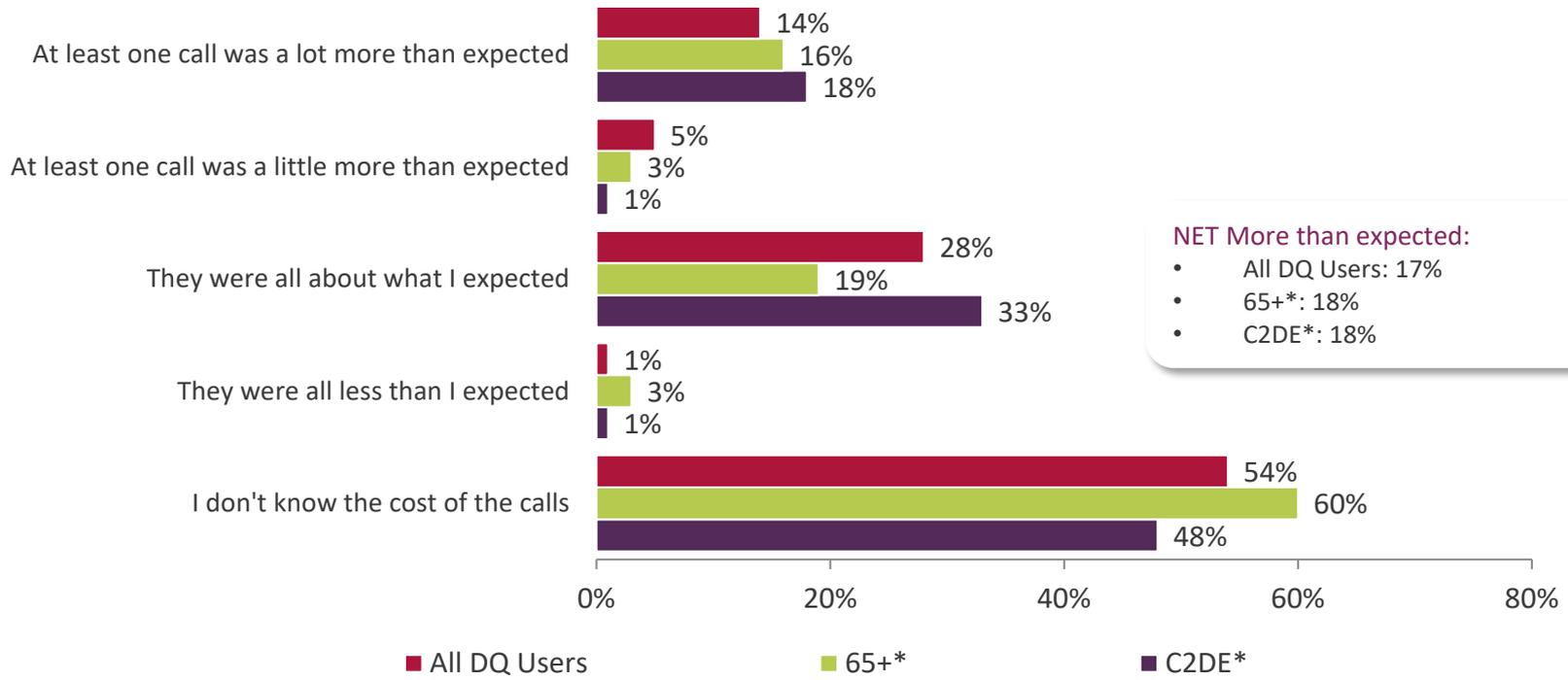
Question: Q18/Q18a Combined. Q18 Thinking about your last call to directory enquiry services, how much more did it cost compared to what you had expected? Numeric response. Q18a (asked to those who 'don't know' at Q18) Using this list approximately how much more did it cost compared to what you had expected? Combined Numeric and Prompted response shown. Mean calculated by using numeric response from Q18 and mid-points from Q18a. Base: All personal Directory Enquiry Users who said the cost of the call was more than expected (115); Last call was from a home/fixed landline* (72). Base sizes for means (excl. don't know, Not Stated and outliers): All personal Directory Enquiry Users who said the cost of the call was more than expected (86); Last call was from a home/fixed landline* (57) *Caution: base under 100, treat as indicative only



Of users who have made more than one call to 118 DQ services, 1-in-6 (17%) say at least one of these other calls (i.e. not their last call) cost more than expected

How the cost of other calls compared to their expectations – **Personal DQ Users who made more than one call (N=132)**

53% of DQ users have made more than 1 call to 118 DQ services in the last 12 months. Of these other calls (with the exception of their last call):



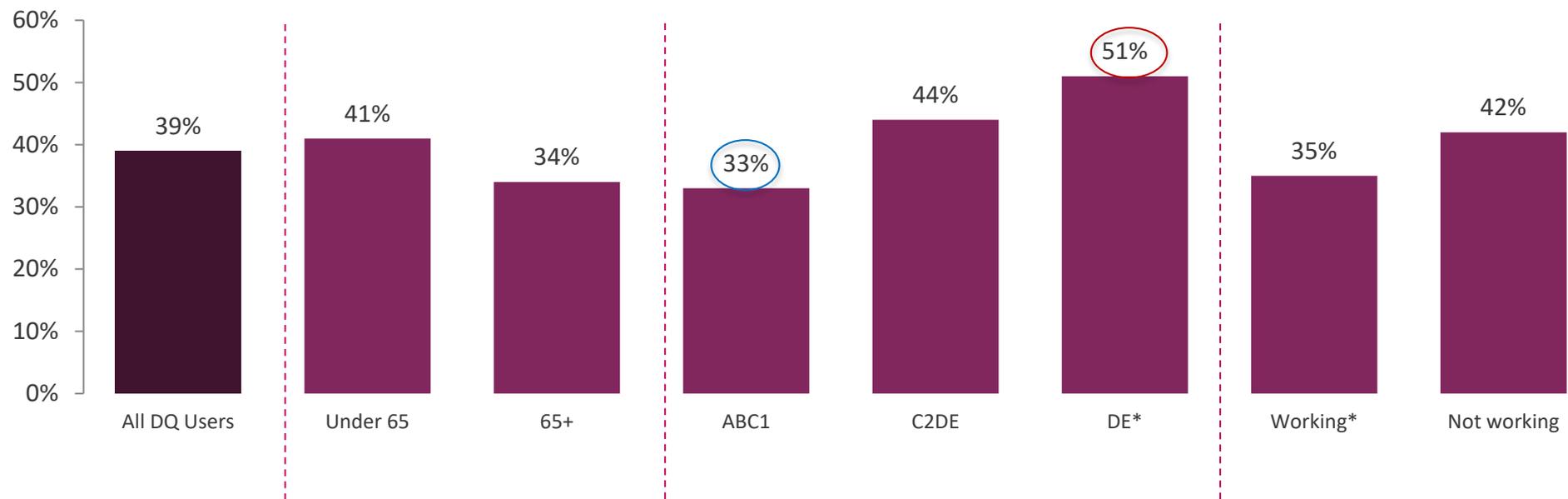
Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q2. How many times in the last 12 months have you made a call to a directory enquiry service from your home fixed landline or personal mobile phone (ie not paid for by a business)? Two plus responses. Prompted. Single Code. Q18B. You said you had called directory enquiries more than once in the last 12 months. Which of the following applies to any of these other calls (i.e. other than your most recent one just answered about)? Prompted. Single-code

Base: Q2: All personal DQ users (Waves 2-6 Only) (255). Q18b: All personal DQ Users who made more than one call to 118 DQ services in the L12M (Waves 2-6 Only) (132); 65+* (58); C2DE* (62) *Caution: base under 100 . Treat as indicative only

2-in-5 (39%) DQ users claim they have had any DQ call cost more than they expected in the L12M. This is higher for users in the DE socio-economic group compared to ABC1s

DQ Users who had any call to DQ in the last 12 months (last call or other calls) cost more than expected – **Personal DQ Users (n=255)**



1 in 10 (10% - Q1a) DQ users recalled their DQ experience when asked if they had spent more than they expected to for any telecoms service in the last 12 months, and presented a list of possible reasons. We consider these to represent those that either had a particularly memorable DQ 'bill shock' experience, or had not experienced other more significant 'bill shocks' through their use of telecoms in a 12 month period.

Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Chart is NET of Q17 and Q18b. Q17. And after the call, how did the cost of this call compare to your expectations? Response: A lot more than expected/a little more than expected. Q18b. You said you had called directory enquiries more than once in the last 12 months. Which of the following applies to any of these other calls (i.e. other than your most recent one just answered about)? Response: At least one call was a lot more than expected/at least one call was a little more than expected. Prompted. Single-code. Data in grey box: Q1a. In the last 12 months, have you spent more than you had expected to for any telephone services, and if so, for what reason was this? Response: Yes – due to using directory enquiry services (e.g. 118 phone line services). Prompted. Multiple code.

Base: Waves 2-6 Only All personal DQ Users (255); Under 65 (138); 65+ (117); ABC1 (116); C2DE (139); DE* (91) Working* (94); Not Working (161) *Caution: Base size under 100, treat as indicative only

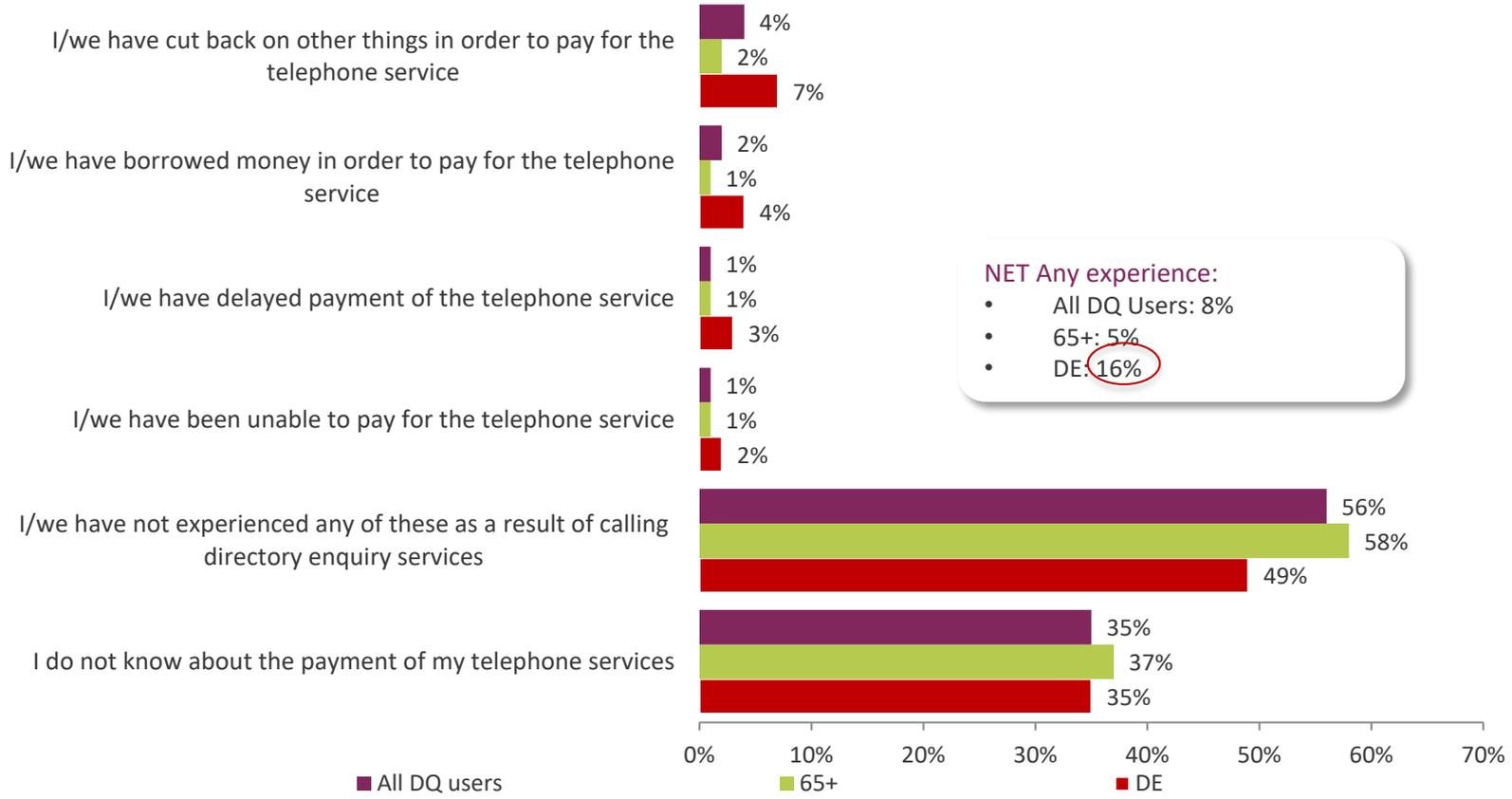
Note: The proportion citing any call was higher than expected among more recent (i.e. L3M) DQ users was 42%, not significantly different to the 39%.

Section 5: Impact of using 118 DQ services



1-in-13 (8%) DQ users say they have been affected financially as a result of calling 118 DQ services, higher among users in the DE group

Impact on household finances of calling 118 DQ services – Personal DQ Users (n=326)



Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

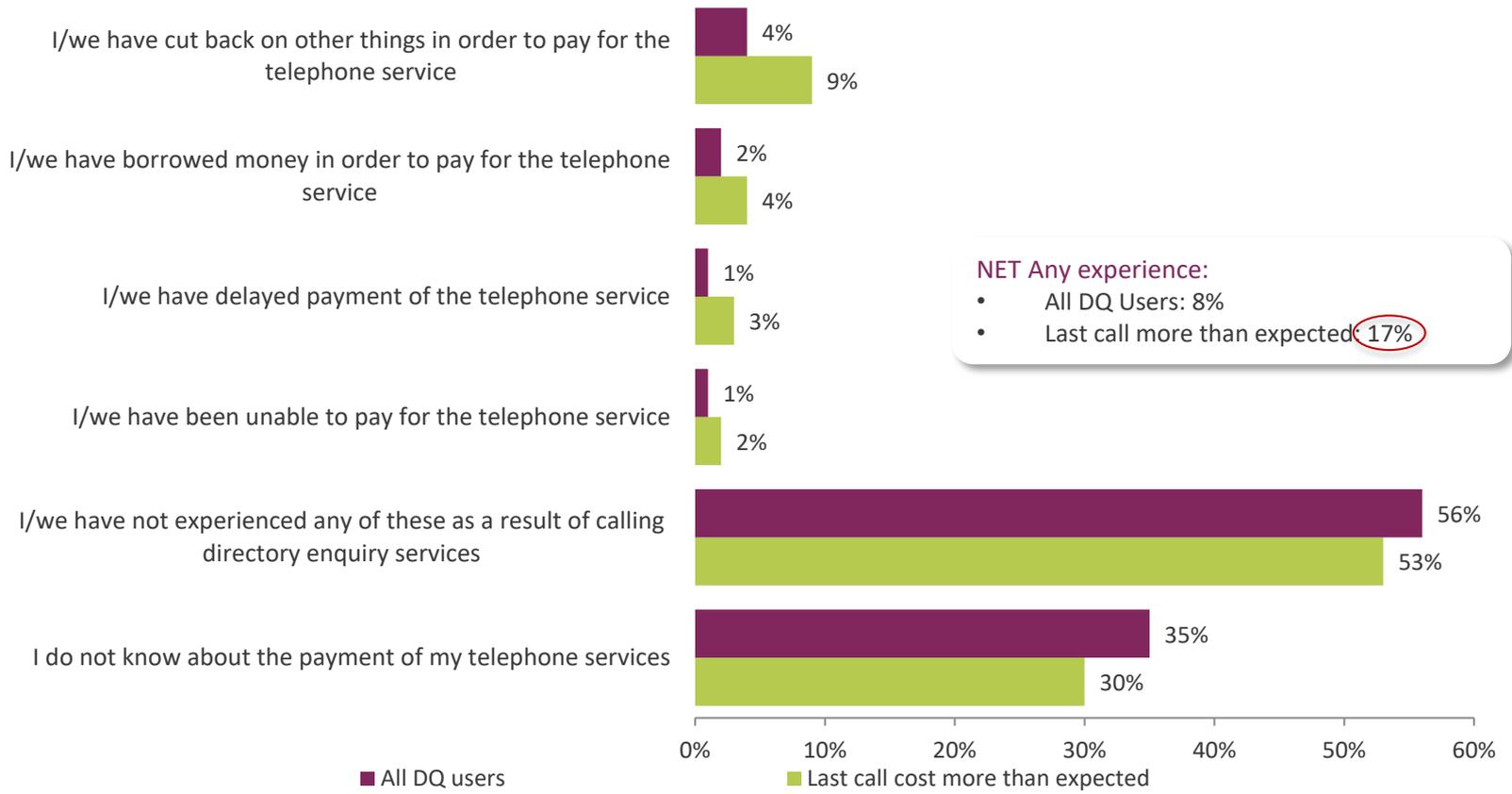
Question: Q22 Now thinking about your overall spending on directory enquiry services in the last 12 months, in what way, if at all, has this impacted you or your household finances? Have you experienced any of the following as a result? Please note I am only interested in times when you think your experience was a result of using a directory enquiry service. Prompted. Multi-code

Base: All personal DQ Users (326); 65+ (150); DE (121)



1-in-6 (17%) DQ users whose last call cost more than expected said they were affected financially as a result of calling 118 DQ services

Impact on household finances of calling 118 DQ services – Personal DQ Users (n=326)



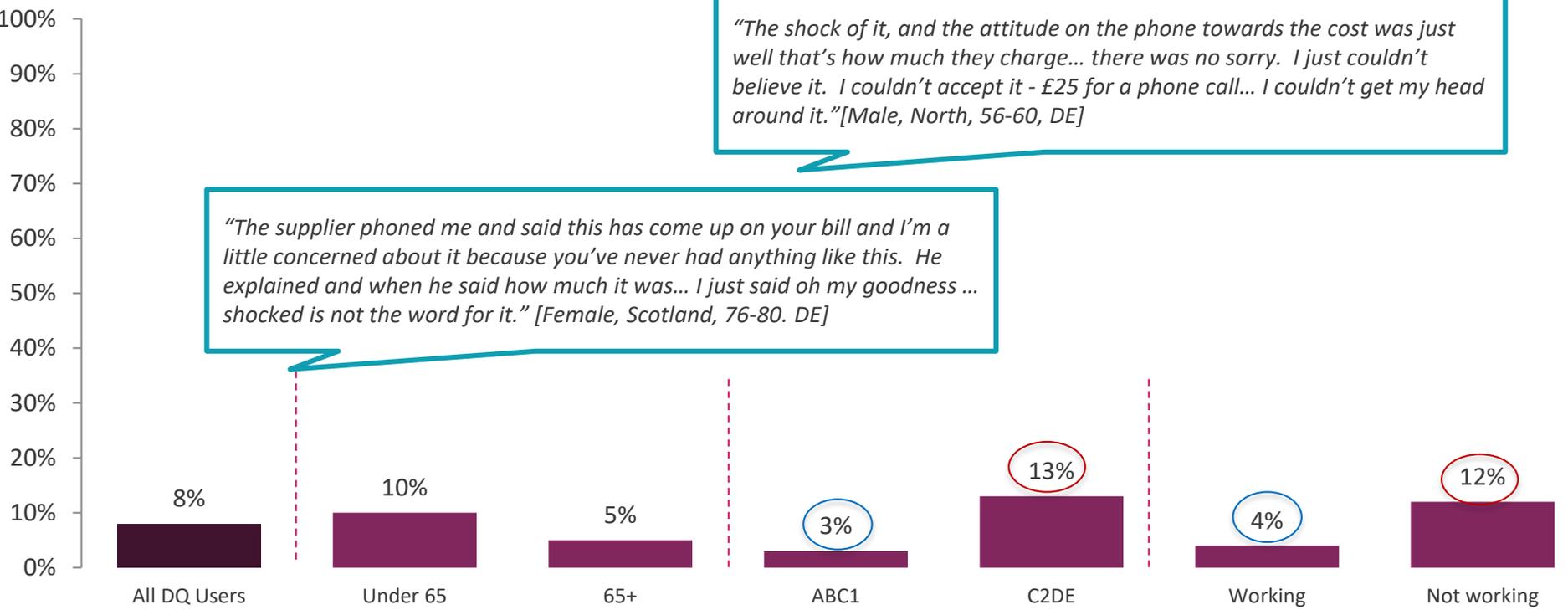
Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q22. Now thinking about your overall spending on directory enquiry services in the last 12 months, in what way, if at all, has this impacted you or your household finances? Have you experienced any of the following as a result? Please note I am only interested in times when you think your experience was a result of using a directory enquiry service. Prompted. Multi-code

Base: All personal DQ Users (326); Last call cost more than expected (115)

DQ users who are C2DE or not working are more likely than their counterparts to say they experienced financial difficulty as a result of calling 118 DQ services

Percentage of DQ Users that were impacted financially* as a result of using 118 DQ services – **Personal DQ Users (n=326)**



*Impacted financially: NET of were unable to pay for their telephone/had to delay payment of their telephone service/ had to cut back on other things to pay for their telephone service/ had to borrow money to pay for their telephone service.

Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q22. Now thinking about your overall spending on directory enquiry services in the last 12 months, in what way, if at all, has this impacted you or your household finances? Have you experienced any of the following as a result? NET any experience. Prompted. Multi-code

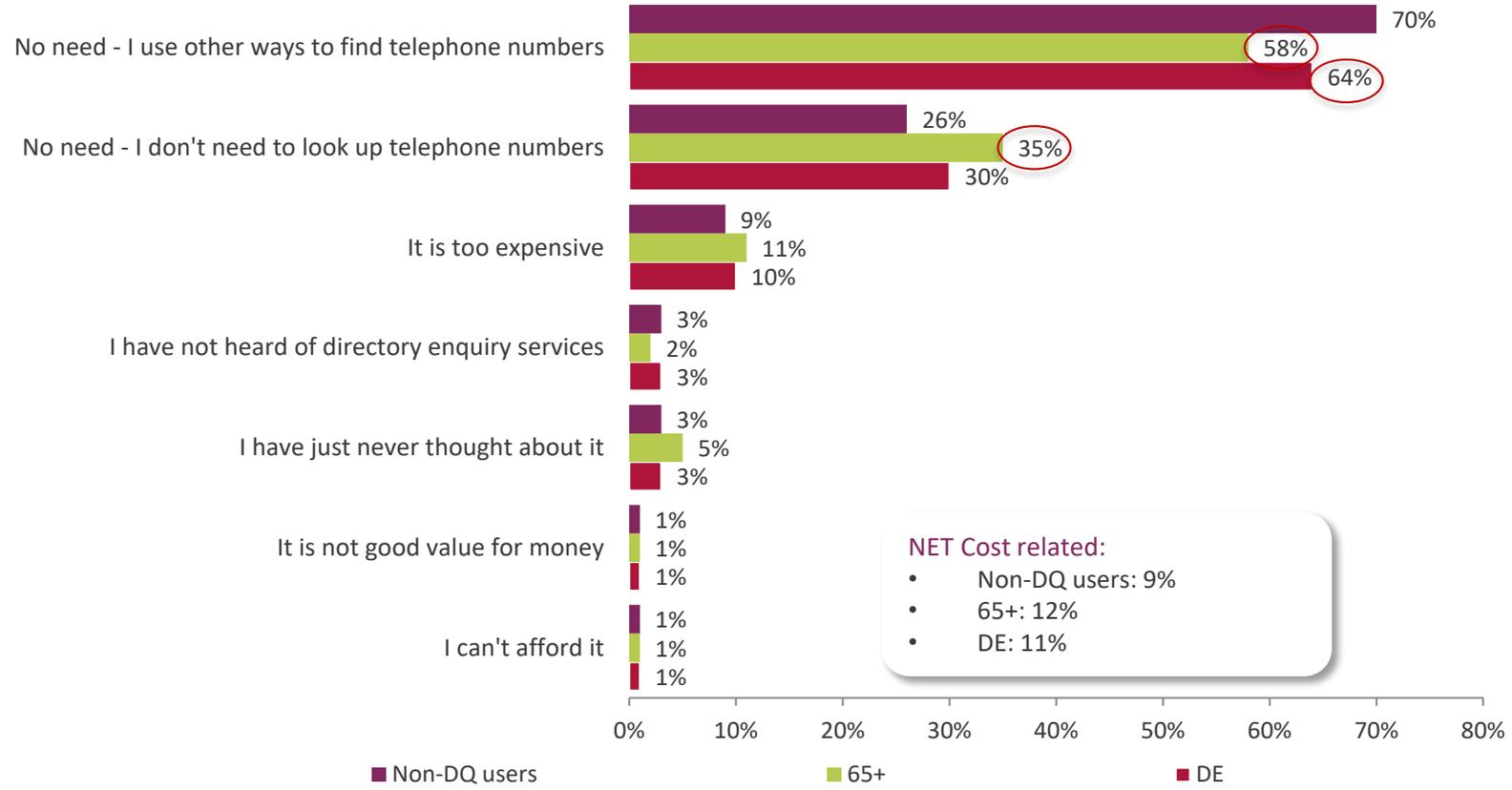
Base: All personal DQ Users (326); Under 65 (176); 65+ (150); ABC1 (146); C2DE (180); Working (118); Not Working (208)

Section 6: Non-directory enquiries users



1-in-10 (9%) non-DQ users say that their reason for not using 118 DQ services is cost related – most finding it too expensive

Reasons why non-DQ users haven't called 118 DQ services in the past 12 months – Non-DQ Users (n=2,040)



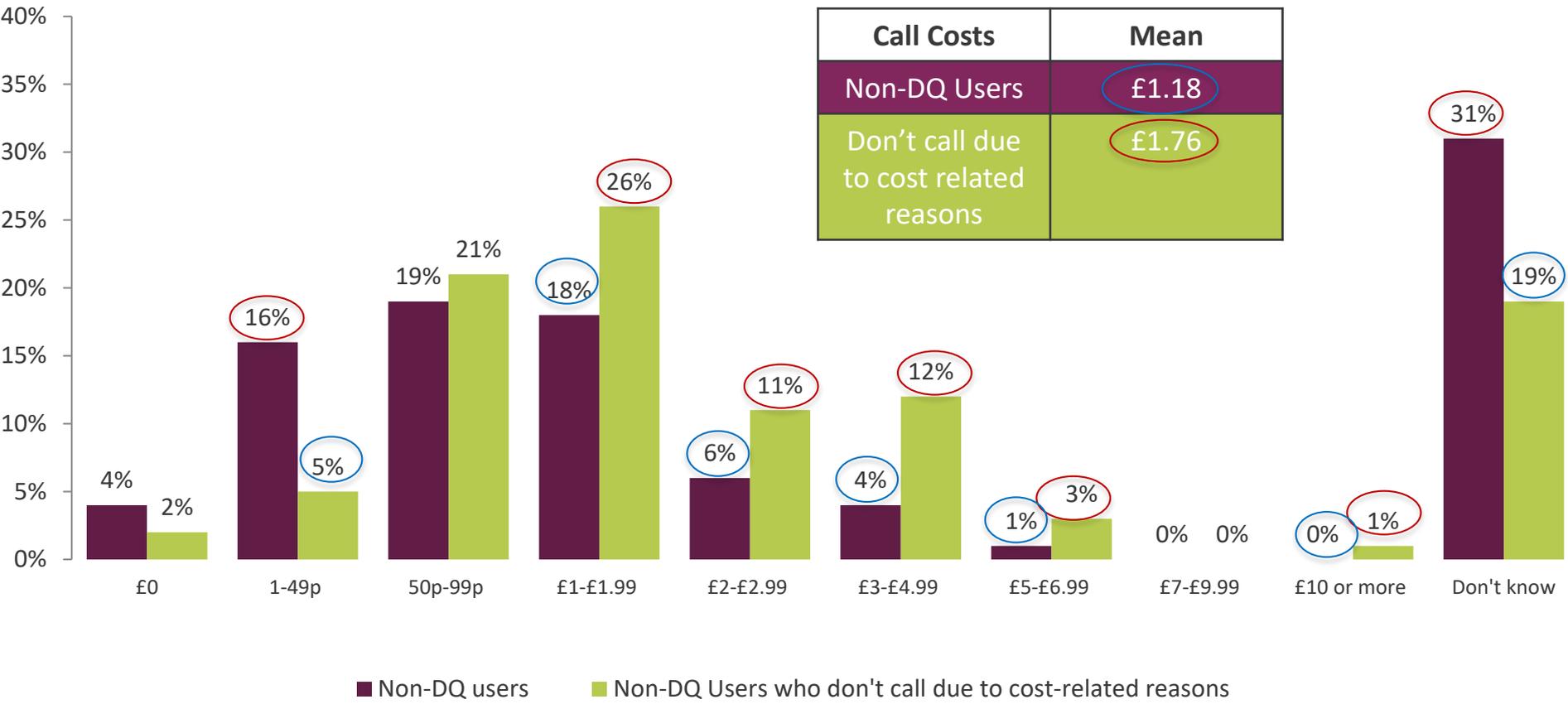
Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q26. Why haven't you called directory enquiry services in the past 12 months? Unprompted into code frame. Multi-code

Base: All non-directory enquiry users (2040); 65+ (600); DE (663)

UK adults 16+ who do not call 118 DQ services for cost related reasons, think the cost of calls on **fixed/landline** are higher, than all non-users

Cost of call to 118 DQ services from a home fixed/landline – **Non-DQ Users (n=2,040)**



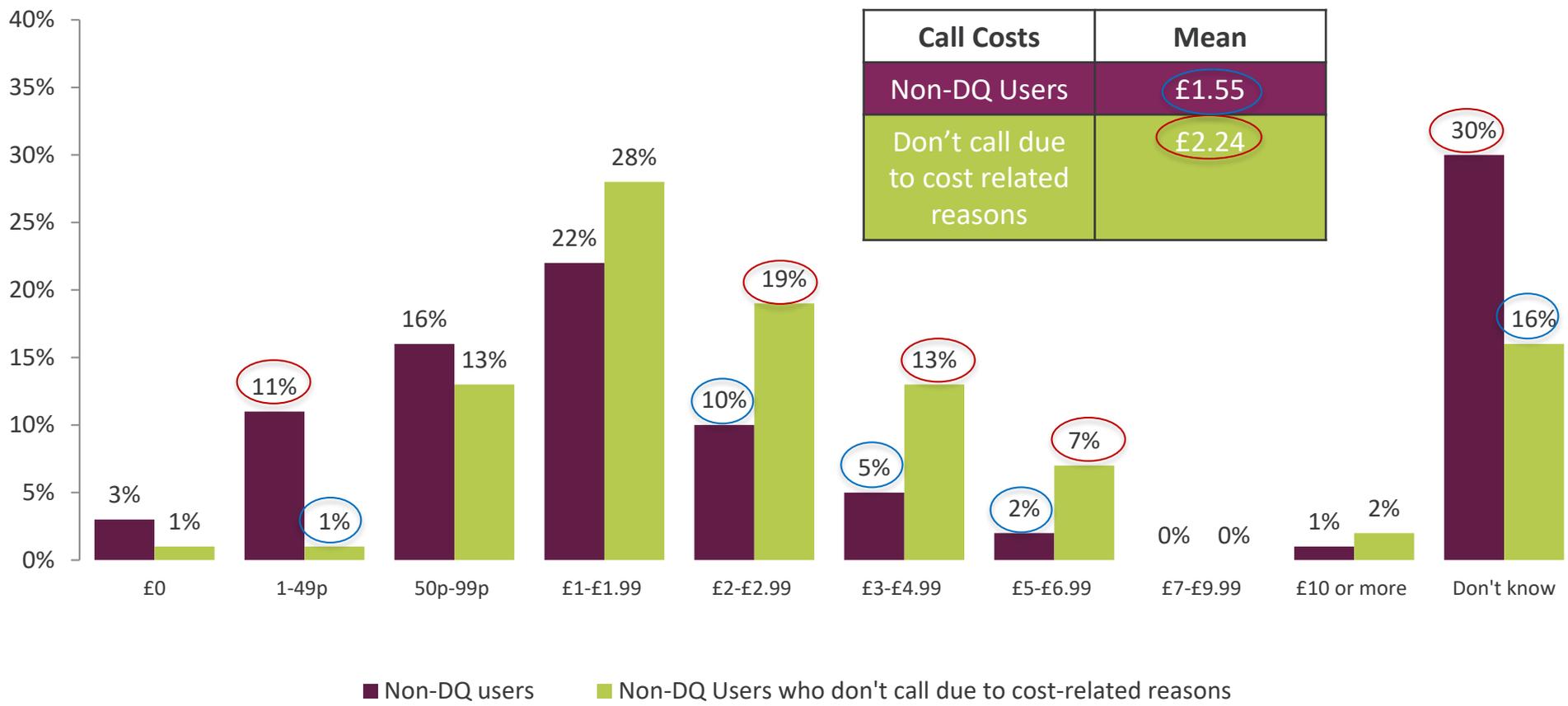
Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q3b Can you tell me approximately how much you think it costs to call a 118 directory enquiry service from a home fixed/landline phone? This is for a call that would last just under 1 minute. Numeric response. Q3bi. (asked to those who 'don't know' at Q3b) Using this list approximately how much do you think it costs to call a 118 directory enquiry service from a home fixed/landline phone? This would be for a call that would last just under 1 minute. Combined numeric and prompted response shown. Mean calculated by using numeric response from Q3b and mid-points from Q3bi. £10 or more was assigned the numeric value of 10. Base: Non-DQ users (2040); Non-DQ Users who don't call due to cost related reasons at Q26 (200). Base sizes for means (excl. don't know): Non-DQ users (1,393); Non-DQ Users who don't call due to cost related reasons at Q26 (160).



UK adults 16+ who do not call 118 DQ services for cost related reasons, think the cost of calls on mobile phones are higher, than all non-users

Cost of call to 118 DQ services from a personal mobile phone – Non-DQ Users (n=2,040)



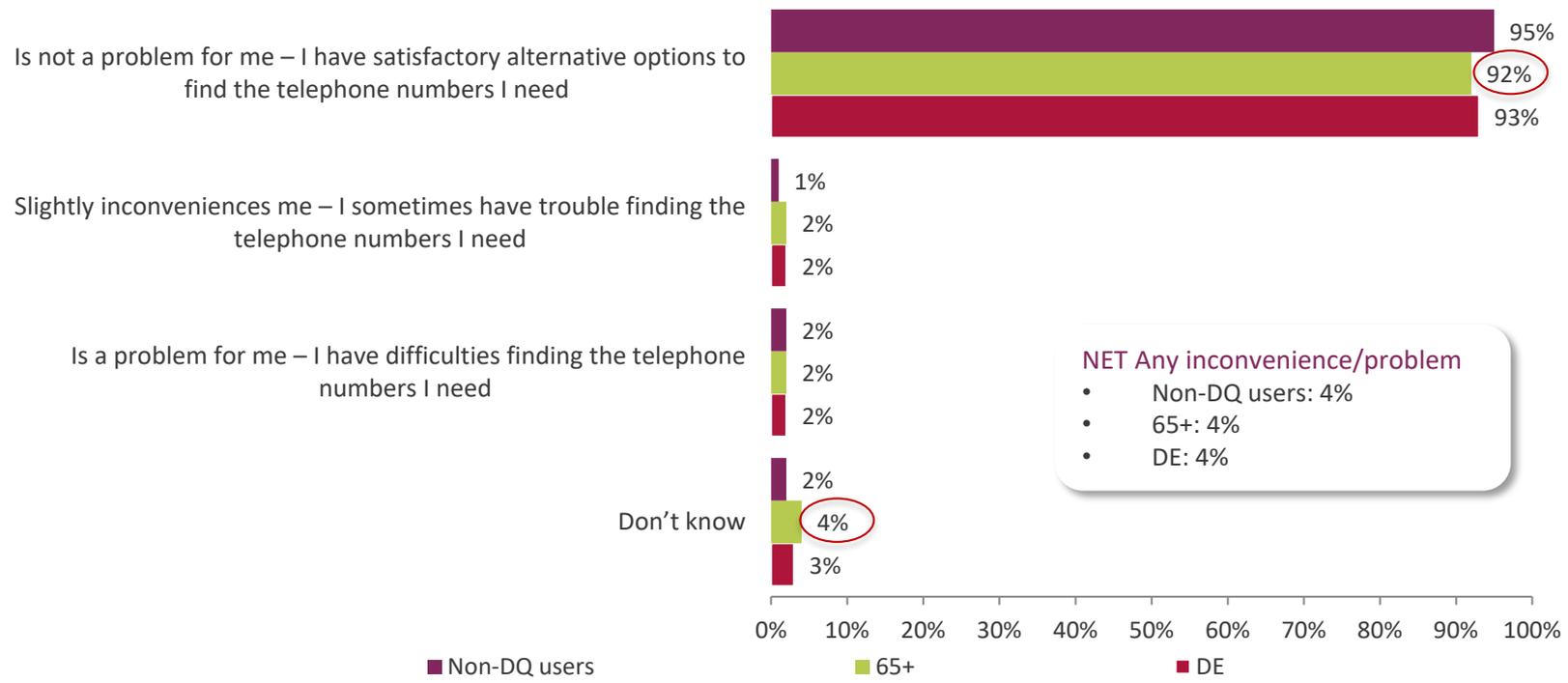
Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q3a Can you tell me approximately how much you think it costs to call a 118 directory enquiry service from a personal mobile phone? This is for a call that would last just under 1 minute. Numeric response. Q3ai. (asked to those who 'don't know' at Q3a) Using this list approximately how much do you think it costs to call a 118 directory enquiry service from a personal mobile phone? This would be for a call that would last just under 1 minute. Combined numeric and prompted response shown. Mean calculated by using numeric response from Q3a and mid-points from Q3ai. £10 or more was assigned the numeric value of 10. Base: Non-DQ users (2040); Non-DQ Users who don't call due to cost related reasons at Q26 (200). Base sizes for means (excl. don't know): Non-DQ users (1,414); Non-DQ Users who don't call due to cost related reasons at Q26 (166).



4% of non-DQ users said that not being able to or willing to use DQ services is an issue for them

Whether not calling 118 DQ services is a problem for non-users – **Non-DQ Users (n=2,040)**



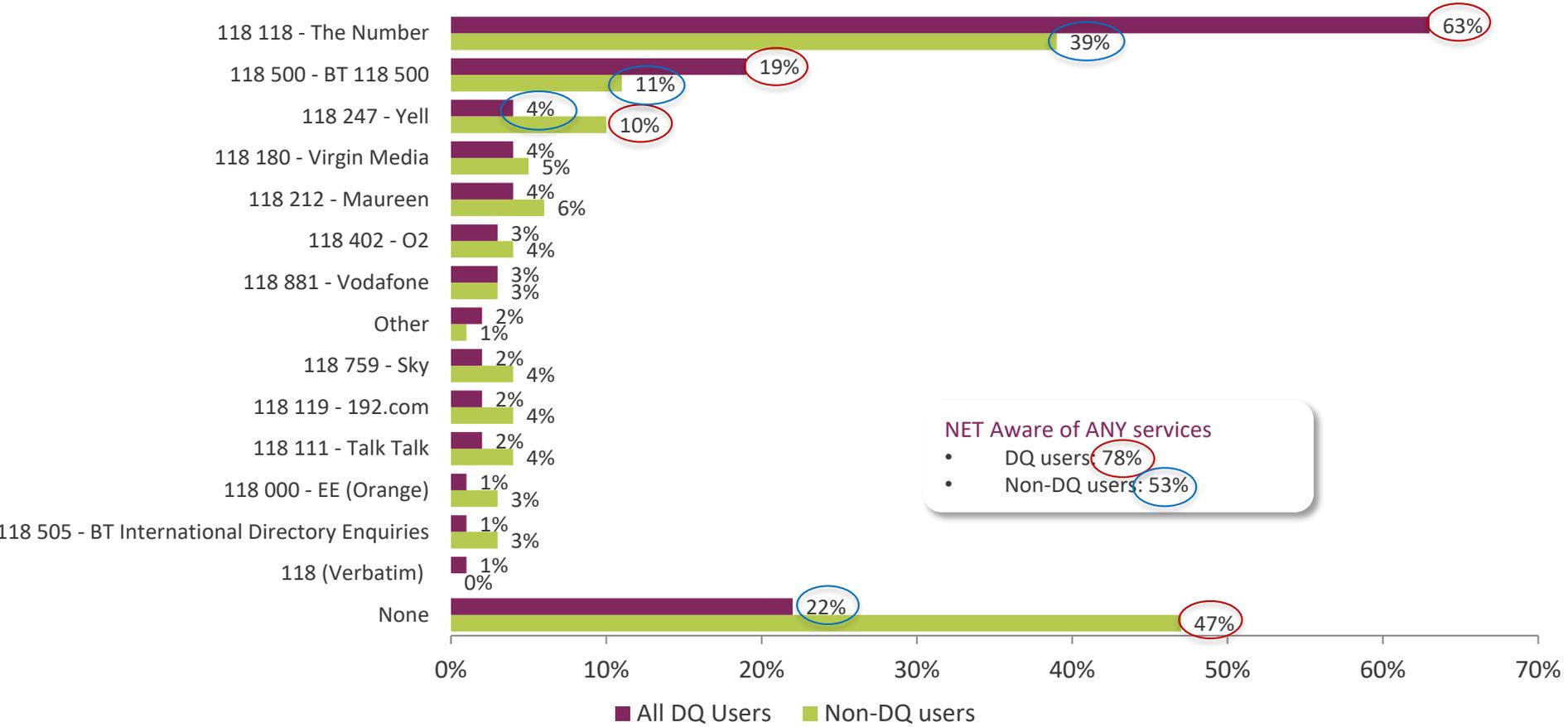
9% non-DQ users do not call 118 DQ services because of cost-related reasons (page 58). Among this sub-group of non-DQ users, 6% said not using a DQ service caused them difficulties in terms of finding the numbers they need.

Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+
 Question: Q27. In terms of you not being able to or willing to use directory enquiry services, which of the below best sums up your feelings towards not using this service? Not using directory enquiry services... Prompted. Single-code
 Base: All non-DQ Users (2040); 65+ (600); DE (663); Non-DQ Users who don't call due to cost related reasons at Q26 (200).



'118 118 The Number' is the directory enquiry service most personal DQ users are aware of, followed by 'BT 118 500'

118 DQ services aware of – Personal DQ Users (n=326) and non-DQ users (n=2,040)



Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Question: Q28. Which directory enquiry services are you aware of? Unprompted into code frame. Multi-code. Services with less than 1% awareness for All DQ users not shown on chart above.

Base: All personal DQ Users (326); Non-DQ users (2040)

Annex A: Qualitative pen portraits



Qualitative phase – 10 telephone-depth interviews

Ten respondents from the quantitative survey also took part in additional telephone-depth interviews, lasting 15-20 minutes.

The main objective of the 10 qualitative telephone-depth interviews was to gain a richer understanding of directory enquiries users experience using 118 directory enquiries, for those users who had paid more than they expected to when using the service. Particular areas of interest were:

- The circumstances of their call to 118 directory enquiries services
- Attitudes towards and availability of alternatives to calling 118 directory enquiries
- The impact of paying more than expected for their call to 118 directory enquiries
- Whether they complained about their experience and if so, what happened.

The following slides are pen-portraits of the 10 respondents and their experiences with using 118 DQ services at times when they paid more than expected.

10 telephone depths among survey respondents with 'bill shock' – a summary of findings

- 1 The qualitative participants claim the 118 telephone service has a reputation for being expensive and try to avoid using it if they can**
 - There is a vague awareness that calls to the 118 telephone service, and the call connect service in particular will be expensive, and most try to avoid using the service altogether unless it feels too difficult or time consuming to find the number any other way.
 - A minority of more savvy and experienced users might try to use the service at work (rather than on their own phone) or accept a high call charge and avoid using call connect in order to minimise the impact of the cost.
 - All of the participants were unsure of the specific cost of their call to the 118 telephone service until their bill arrived.

Calls are mostly important or urgent, and only used in emergencies by some vulnerable / elderly participants

- 2**
 - Calls to the 118 telephone service tend to be important and / or urgent and getting the number they need when there seems to be no other easy way to do this can be a relief at the time.
 - For instance two vulnerable and elderly participants used 118 call services in an emergency. One of these participants used the service to reach her eldest son at his place of work (on an unfamiliar number) to let him know that his brother had been rushed to hospital. A second house-bound elderly participant used the 118 telephone service to call her doctor because she felt very ill.

All reacted negatively to their bill but tend to disassociate the perceived expense from the service experience when answering the survey

- 3**
 - All the participants reacted negatively to the cost of the call and described having 'bill shock' to varying degrees, some of the older participants (51+ years) articulated feeling varying degrees of distress over the expense incurred, particularly when the circumstances around the call was also distressing.
 - However, participants tended to report feeling *satisfied* or *very satisfied* with the service experience on the survey. The qualitative evidence suggests that these participants had disassociated their view of the service received from their bill experience, and seemed to treat these as two different experiences.

Some participants blame themselves, and are unwilling to complain in case they face more charges

- 4**
 - More generally, bill shock blame tends to be directed towards themselves, rather than the 118 telephone service. A minority blame their own telephone service provider and the lack of regulation.
 - During the fieldwork period, two of the participants continued to struggle to pay their bill.
 - No complaint has been made to the 118 telephone service for fear of facing more charges.

Respondent 1

Gender: male

Age: 61-65

Socio-economic group: C1

Lives in Northern Ireland, is retired and suffers from breathlessness.

He has the internet at home



1 Circumstances leading up to the call

His computer broke down and he could not access the internet. He wanted to reach the computer repair company by 5pm and didn't have long to do this. He felt quite desperate and didn't feel he had the time to go hunting for his published telephone directory.

He felt anxious making the call to 118 because he has heard about the high call charges from various sources including: a Watchdog programme, Which magazine and he believes it has been raised in the House of Commons. Despite this, he made the call, but intended to keep it short.

He claims he knew not to make the call or to use the call connect services, but he did anyway, because he was in a rush.

"I let them put me through.... I knew I'd get charged, and it would be more than the standard charge.... I know not to let them connect me... but I did."

He claims the cost of the call was not made clear at any time during the initial request or whilst being connected. He just had a vague awareness that this was going to be an expensive call.

2 Financial impact

He thinks the bill was about £4 which he felt is far too high for the short amount of time he was on the call.

"It was £4... I remember thinking flip me.... I won't let that happen again... for me that's dear [expensive]... I was only on the phone two to three minutes."

He was angry with himself when he saw this. He also feels angry towards the government for not regulating this or doing anything about this problem.

"I know they are a rip off... I remember the days when it was free.... Everyone is out to make a buck on you [these days]."

"Before I did it I thought, go and look in the [published] phone directory."

"I blame the government, they can't be unaware... they don't care... they deregulated everything, and it has led to everything having a pound sign on it...another symptom of a failing society."

Interestingly he claimed to be satisfied on the survey. This is because he got the number he needed quickly. He separated the service from the bill in his mind when completing the survey.

"I asked for X and I got X, that's probably why I might have put satisfied."

There was little financial impact. He paid the bill. He was more affected on a personal level.

3 Final comments

He does not intend to use this 118 telephone service again. Next time, he has resolved to find the published directory or call someone who might know.

"I don't like people ripping me off... the world is getting uglier."

He believes the cost of the call (per minute) should be made clear before and during the call, and when being connected.

He argues that a directory enquiries service should be free of charge. He claims that historically it used to be.

"Everything should be upfront... but it should be free."

He is pleased this is being looked into by Ofcom. He argues that this lack of transparency is dishonest and should be stopped.



1 Circumstances leading up to the call

He will occasionally use the 118 telephone enquiries service at home, to find a new number, albeit reluctantly. He prefers to use it at work if he can, because he is aware that the charges are higher than standard call charges. When at home, he takes care not to use call connect, as he believes there are high costs also associated with this.

On this occasion, when he used the 118 telephone service, he needed a number for work (social security) and needed it urgently. He couldn't find it in the published telephone directory and was in a hurry. He doesn't use the internet to search telephone numbers.

He seems to like the 118 telephone service, he finds it quick, reliable and easy.

"I don't like calling from home because it's expensive.... But it's the easiest and quickest way to get a number."

"118 is an easy number to remember."

The elderly lady he knows seems to rely more on the 118 telephone service. She finds it difficult to read telephone numbers in a published telephone directory and can more easily input 118 118 into her adapted telephone. The call connect then makes it easier for her, as she can then avoid inputting lots of numbers.

2 Financial impact

He is not concerned about the financial impact on his bill, because he tries to not use it often and never uses call connect. He is however, concerned about the cost to the elderly lady he knows. She is fairly affluent and doesn't worry so much about the bills, but she receives very high call charges because she has grown reliant on using the 118 telephone service to contact people. He claims that it is very difficult for her to find numbers any other way. He saw a recent bill for £13.50 for one call. The lady had no idea why it was such a high bill. They think she might have call connected and left the phone off the hook.

"She's an elderly woman. She might have forgotten to put the phone down. I don't know. It happens fairly frequently (high 118 call charges)."

Both he and the elderly lady seem confused as to how the calls are so high. When I ask what the cost of the calls he tends to make, he claims to not know but guesses it might be 50p. This guess is based on seeing bills in the past.

"She's not very happy about it.... she's quite vulnerable... I get more upset that the bill is so much for her."

3 Final comments

Despite the high call charges, he rated the service as very satisfied, on the survey. He explains that he did this because he gets the numbers he needs when there seems to be no other way of getting them quickly. The 118 telephone service also sometimes provide an address, which is useful. He separated the efficiency of the service experience from the cost of the calls.

"Very satisfied, they always get the numbers and can provide an address if I need it."

"It's a necessary evil. It's expensive, but it's good, the people are quite helpful and pleasant."

Respondent 2

Gender: male

Age: 71-75

Socio-economic group: C1

Lives in the south of England and works part time as an accountant. He is hearing impaired. He has internet access at home.

He is the accountant for an elderly lady he knows. He told us that this lady also uses the 118 telephone enquiries service occasionally and he has had to bring the high charges to her attention, because her bills were unacceptably high.

The lady he describes, is elderly and reliant upon others for support. She is hearing and visually impaired and uses a phone adapted for her with large numbers.

Respondent 3

Gender: Female

Age: 71-75

Socio-economic group: DE

Lives alone, in the South of England and has difficulty walking. She has a neighbour who is a friend that she can rely on for support. Her son also visits her daily to provide support.

She has internet connection at home for her grandchildren to use, when they visit. She does not use it. Her son arranged it to be installed.



1 Circumstances leading up to the call

Her flat was flooded before the 118 telephone directory enquiries call was made and she lost a lot of personal things, including her personal address book. This is where she stored all her essential numbers. She claims that she has not seen a published directory enquiries phone book for many years, and this would be useful.

She knows the 118 number from TV ads, but her children have always told her to avoid using the 118 telephone service (except in an emergency), because they are very expensive. They also warned her, that should she have to use the service to not accept the call connect service as this is also expensive.

She believed this occasion was an emergency. She felt very ill. She couldn't walk to the surgery to make an appointment and she didn't want to trouble her son. Her neighbour was away at work. She felt anxious when making the call because she was aware it could be expensive. She felt quite vulnerable. She dreaded the bill coming and had no idea how much it would be. She claims the cost of the call was not made clear at any point.

"I was worried about what it was going to cost ...my son says not to use those numbers (118 telephone service)... (he says) they're extortionate."

2 Financial impact

She thinks it was about £3 for the call. She felt angry and shocked when she saw the bill, although she directs that anger towards herself.

"I think it was £3 for that call, which is a lot of money."

She could afford to pay it, and the financial impact was not as bad as it could have been (had she made more than one call).

She still feels angry that there aren't options available to people in her situation, who need to obtain numbers to get medical attention and then face high call charges.

"It makes you feel sick and angry. I get angry with myself, and the companies taking the mickey out of people. It shouldn't be allowed."

"If you're in a situation where you are not well... if you don't know what to do, you would just desperately call 118."

She didn't complain or do anything, except resolve not to call them again.

"I'm not one to make a complaint. I don't do that."

3 Final comments

This experience has increased her reliance upon her son and made her feel more vulnerable. She said that if she didn't have children to help her, she would not know what to do. She is clearly anxious about this happening again, and angry there isn't more support for people in her situation.

"I wouldn't know what to do."

Her message to others is to avoid using the service if they can. Although she suspects that people like her (if aware) only use the service in emergencies. However, she is concerned that some might not know to expect such high charges.

"Try not to use it. You don't know what they're going to charge you."

She would like to see a free service provided, where the elderly can contact for free to obtain important numbers.

Her message to Ofcom is simple....

"Please, please sort it out."

Respondent 4

Gender: Female

Age: 31-35

Socio-economic group: D

Lives in Wales

She is currently unemployed and her dad is helping her to pay her bills. She has the internet at home.



1 Circumstances leading up to the call



She needed to call a restaurant to arrange for a takeout. Her smart phone is broken and she had no internet access where she was. She remembers two 118 telephone service numbers from TV ads: 118 118 and 118 123 (Yell).

She prefers to use the internet to obtain numbers she needs because it is quicker and free on her smart phone. An alternative to the internet is to use a published telephone directory including Thomson and Yellow Pages, but she doesn't seem to receive these anymore.

She is somewhat reluctant to use the 118 telephone service, as she considers it expensive. She also avoids connecting calls to try and minimise the cost. She has learned this from experience.

"It's not my primary search option, but it does help if you don't have other options such as the Thomson, Yellow Pages or the internet."

She seems to feel quite positive towards the brand, and considers it a useful option to have if you don't have access to the internet. She seems very accepting that the charge is higher than for a standard call, but she is wary of using it too often.

"It's good for people who don't have the internet... if you can't use google than 118 is good."

2 Financial impact



She believes the cost of calling 118 is £1.80, regardless of how long the call costs or how many numbers you ask for. As long as you don't use call connect, it should not get any higher than this set charge. Although she acknowledges that she has assumed this from looking at her bills over the years, and noticing that they tend to be £1.80.

"They don't mention it [cost] on the call... it's not that they are deliberately deceiving you but it would be helpful to let the customer know."

She was neither satisfied nor dissatisfied with the service, because there was not an issue finding the number for her.

3 Final comments



She views the 118 telephone service as a good final resort.

"I assume the high costs comes with call connect and £1.80 is a set number for the initial call... Is that not right?"

"They're a good service but just give us a heads up on the service charges and that it might vary... because they don't say that."



1 Circumstances leading up to the call 

She regularly uses 118 numbers including 118 500 to find new numbers using her own phone and her phone at work. She will find numbers for plumbers, hairstylists etc. She knows the costs are higher than standard charges so she avoids using her own phone to do this if she can, choosing to wait and do it at work. On this occasion she used her own phone.

She expects the calls to be about £2.50 per minute and so will keep the calls as short as she can. She also avoids using the call connect service to try to keep the cost down.

She claims the 118 telephone service informs her during the call as to how much to expect to pay. Sometimes when she hears the cost she hangs up because she considers it to be too high. She believes the prices can get very high, very quickly, and they vary depending where she is calling from. She is unclear as to the exact price structure when the call is connected, as she does not normally get that far on the call.

"If I want the number quickly it's just easier to get the number that way. I must admit I do it at work, so it's not my bill. I will call from my mobile (phone) but not very often... the costs are quite expensive... it can be £2.50 per minute."

2 Financial impact 

Despite being aware that the call charges to the 118 telephone service will be high, the difference these charges make to her bill are always a bit of a shock. These perceived high costs are why she tries to avoid making calls to 118 on her own mobile phone.

She is satisfied with the service she receives which she separates from the bill experience.

3 Final comments

She claims she will continue as she normally does, and will continue to be mindful of the potential charges.

She can always use the internet for numbers that are easier to find that way.

Respondent 5

Gender: Female

Age: 46-50 years

Socio-economic group: C1

Lives in the North of England. She has the internet at home.



1 Circumstances leading up to the call 

He has the internet at home for younger members of his family to use when visiting. He has a telephone directory, which he would normally use to find a new number. He claims to have not received an updated paper directory for a long time.

On this occasion, he left work and noticed he had a voice message regarding his Working Tax Credits. He was concerned about this and wanted to speak to someone before the offices closed. He claims the number he needed on the voice message wasn't clear, so he decided to use the 118 telephone service to obtain the number quickly.

"I wanted to speak to someone quickly.... I was in a bit of a panic."

He remembered the 118 telephone number from TV adverts. He has used the service before. He thinks their charges are higher than standard charges and although he's never spent more than he can afford, he tries to avoid using the service, as it can make a significant difference to his phone bill. He also avoids using the call connect service, because he considers these charges to be unacceptably high.

"It's not the cheapest way to get a number."

He claims the directory enquiries service used to be free in the past. He therefore, resents paying more than the standard charge for a service he used to get for free.

"You could call BT for free (in the past)."

2 Financial impact 

He thought the call was expensive when his bill arrived. He seems to remember it being about 80p. He is relieved he didn't use the call connect service. On the one hand, he feels a bit cheated, as the call is higher than expected for such a small and quick request. On the other hand, he got the number he needed quickly and was able to make the call he needed to make and at the time he needed to make it. This was a huge relief at the time.

"I was a bit gutted, but I was desperate."

He claims that he wasn't made aware of how much it would cost at any time during the call. This information occurs at the bill stage. This can leave customers worried about the cost they might have incurred until their bill arrives. He went on to explain that the charge seems a small amount of money, but it had greater significance when added to his mobile phone bill.

"No, you don't know (the cost) until you get the bill... they don't tell you, when you call."

"We are used to it (directory enquiries) being free. It's only a pound but it's still a lot to pay on your mobile bill."

Despite this uncertainty and resentment relating to charges, he claimed to be very satisfied with the service on the survey. He made the call during a moment when he felt vulnerable and was unsure as to how he would have found the number any other way. He wasn't at home to check his directory, so under the circumstances, he was pleased they were able to help.

3 Final comments 

He limits how frequently he uses the 118 telephone service due to the perceived high cost of using it. The financial impact is not particularly high, but it did affect him on a personal level and he will try to avoid using it again.

"I don't use them that much... because of how expensive it is."

His message to others, is to try and avoid using the 118 telephone service if they can. Although it can be difficult when a number is needed urgently and you don't have a paper telephone directory or struggle to use the internet. He would advise people to keep the call short and to never use call connect.

"Try to avoid using it (118 telephone service) if you can."

Respondent 6

Gender: male

Age: 51-55 years

Socio-economic group: DE

Lives in the North of England.

He has the internet at home.

Respondent 7

Gender: male

Age: 56-60 years

Socio-economic group: DE

Lives in the North of England. He is currently unemployed and is receiving benefits. He is struggling to pay his bills. He does not have internet access.



1 Circumstances leading up to the call

He normally refers to paperwork or adverts to obtain new numbers. He wouldn't normally think of using a 118 telephone service, although he has used it in the past.

On this occasion, about 3 months ago, he needed a business number and considered the 118 telephone service to be the quickest way to make this call. It was a new business number he needed, and he couldn't wait until he saw the advert again to obtain the number. It was an important call, although he can't recall (or won't reveal) the details of why it was important.

"I don't have a phone book or yellow pages, it was a (new) number that I needed."

He claims he did not use the call connect service and he simply asked for the number and was on the call for a couple of minutes. He used his mobile to make the call, and claims the cost of the call was not made clear at any point.

2 Financial impact

He claims he has used the 118 telephone enquiries service on occasion in the past, and has never noticed the cost of it on his bill before. He was shocked when he saw his most recent telephone bill. He immediately rang 02 to complain and query why the bill was so high and was informed about the cost of the call to the 118 telephone service.

He seems to blame his phone provider (02) for the charge of the call to the 118 telephone service. He is confused as to why he was charged so much. The bill remains unpaid and consequently he lost his contract with his phone provider.

"I was disgusted I rang 02 and asked how come you've charged me so much to call 118. Their reply was that 118 had charged them £25... I said I don't think so, just to get a number? I wasn't on the phone for more than 2 minutes. I refused to pay it. I said I'm not paying that. So, they (02) cut me off.... they did. I was fuming over it. I'm with 3 now."

He didn't call the 118 telephone service to complain, in case he received more high call charges. He is unsure of how else to complain.

"I wouldn't ring them to complain in case I got charged another £25... I wouldn't even know an address of who to send it (complaint) to."

He thinks his mobile phone provider 02 has a responsibility to make customers aware of numbers that have high call charges.

"(I'm angry at) 02 who should not let you call 118 without letting you know that this call is going to cost you £25 and at 118 for charging such an outstanding fee. You should be made aware when taking out a contract that certain numbers are high charge numbers."

He recorded 'very dissatisfied' with the service on the survey.

3 Final comments

Had he known how much it would cost he would not have made that call. He will never use 118 services again. He is going to obtain a published telephone directory.

"I wouldn't have made it (if I'd have known the charge)."

"It's too high, that's a lot of money. I'm only on benefits."

He is worried that this unpaid bill will negatively impact his credit rating.

He has warned friends about using the 118 telephone service.

"I say to my friends don't use it."

He is pleased that he can have this opportunity to inform Ofcom about this negative experience.

Respondent 8

Gender: female

Age: 71-75 years

Socio-economic group: DE

Lives in Northern Ireland.

She has the internet at home.



1 Circumstances leading up to the call

She was trying to find out the telephone number of a long lost friend in Bristol. She would normally find a friend's address using a Belfast published telephone directory, but she has not got a published telephone directory for English numbers.

She had seen the 118 number advertised on TV and thought this was the only option available to her.

She is unsure as to whether she was connected. She thinks on reflection that she took the number down and then called them herself at a later point. She only remembers being on the 118 call for a few minutes.

2 Financial impact

She called Sky to enquire why her Sky bill was so high, and Sky informed her that 118 had charged her £10 for the call she made. She was shocked by this.

"They charged me £10... I wasn't happy at all."

She blames herself but didn't complain to the 118 telephone service.

"I just felt stupid.... If it had been a pound or two pounds, I wouldn't have minded but it was £10, I nearly died... I didn't know it was that dear, I nearly died... £10!"

"It will teach me a lesson, I won't use it again."

The bill was paid, it wasn't too difficult to pay it, but she feels cross and upset by the experience.

"I was upset about it. They (118 telephone service) should tell you."

Nevertheless, she put satisfied on the survey, because 118 found the number she needed, even though she only had part of the address. This impressed her. She seems to have separated the service experience from the bill shock.

She remembers directory enquiries being 192 and free to use. She didn't expect to be charged so heavily for using a number that has replaced 192 and used to be free.

3 Final comments

She refuses to use the 118 telephone service again.

She argues that more transparency is needed for people to make an informed decision when making the call to the 118 telephone service.

"I won't be using 118 again."

"They should tell you... they don't tell you... they should tell you what the charge is for this.... If I'd have known I wouldn't have bothered."



1 Circumstances leading up to the call 

Normally, she would use a published telephone directory, or ask her son to google a new number she needed.

On this occasion, she needed a new number, but cannot recall why it was important to make the call. However, she knows it must have been important because she would not have used the 118 telephone service otherwise, because she considers the 118 telephone service to be expensive.

She argues that if a number is important and needed quickly, it can be tempting to use the 118 telephone service. Although, this tends to be a last resort. She does not use call connect to keep the cost down.

"I always ask for the number and do it myself."

"I wouldn't have used 118 unless it was important. I would have asked someone else (for the number) rather than 118."

"I'm reluctant to use 118 because they are so expensive....It's a last resort."

2 Financial impact 

She and her husband were very shocked by how expensive the charge was (£6-£7), particularly considering how short the call was and she hadn't used the call connect service. The financial impact wasn't so great, but they didn't like paying such a high bill for a short call. It seemed even higher than previous calls she had made in the past. She is confused as to why it is so high. She claims the cost of the calls are not made clear at any point.

"My husband went mental. He was shocked at the price. It was a ridiculous amount. At least £6-£7 just to give you a number."

"Such an extortionate price and I never connected."

"They don't tell you... I didn't know (the cost) until the bill came... I was only on the phone 30 seconds to a minute."

It didn't occur to them to make a complaint. She seems to blame herself for not knowing the cost of the service.

"It never entered our heads to complain."

She rated the service as very satisfied despite the higher than anticipated call charges and bill shock. She separated the service experience from the bill when answering that question on the survey.

"They gave us a service and that's their charge. They give you the number really quickly. The service they give you is good.... It's just very expensive."

3 Final comments 

Despite being cross about the charge, she admits to having used the 118 telephone service once again quite recently. She argues that it can sometimes seem the only way to find a number in a reasonable amount of time, to those who are not internet savvy.

"They've got you over a barrel, if you can't find a number, you have to use their service."

"I suppose you could Google it, but I'm not au-fait with Googling. I tend to call my son to search for me. I will do that more now [call son]."

Her message to Ofcom would be to ask why the service is so high and why are they allowed to not make the charges clear to customers.

"I'd ask Ofcom why is it so expensive."

Respondent 9

Gender: female

Age: 61-65

Socio-economic group:C1

Lives in the Midlands, and is a Foster Carer.

She has no internet access



1 Circumstances leading up to the call 

She has never used the 118 telephone service before, she's never felt the need and she has heard from her children that it can be expensive.

However, this was an emergency, as sadly she had received a message to say her younger son had been rushed to hospital and she was trying to reach her eldest son to let him know.

She normally uses a 'phone book' as she calls it, but she was struggling to find her eldest son's place of work in the telephone directory, after failing to reach him on his mobile phone. It is possible she panicked, so she remembered the 118 telephone service and decided on the spur of the moment to use it.

She agreed to be connected, because she was in such a desperate state. She was also unaware of how much the call and the connection would cost. She claims this was not made clear to her during the call. She stated that she would never have agreed to be connected had she known.

"They asked to put me through and I was very upset, so of course I just said yes."

"No (I didn't know) or I would never have let them do it (connect the call)."

2 Financial impact 

Her phone provider contacted her to ask if it was her that made the call because her bills are normally not as high as this and they were concerned someone had used her phone. She was shocked when she spoke to them and they told her about the charge. The financial impact has been high on this participant. She has struggled to pay the £15-20 cost of the call. The company has agreed to take extra every month from her account to pay the bill.

Having to spend a bit more on her phone bill each month to pay the bill has meant she has had to buy cheaper food. She has also struggled to buy birthday presents in November for her son and grandchildren. She is worried about Christmas, this is usually a difficult time for her financially anyway. She is very upset by this experience.

"The supplier phoned me and said this has come up on your bill and I'm a little concerned about it because you've never had anything like this. He explained and when he said how much it was... I just said oh my goodness ... shocked is not the word for it."

"What can you do about it. I made the phone call and I was going to have to pay for it."

"When they offer to make that call for you (connect) it would be better for everybody to explain how much the call will be. But they are not going to do that because they get money from you. So there is no way that they will explain how much it will cost."

Nevertheless she answered satisfied on the survey but she thinks this might have been a mistake.

3 Final comments 

Her children have made sure she has all the numbers she needs now to avoid having to use the 118 telephone service again.

"I will never do it again and have spoken to friends and made them aware of what happens."

"I don't have plenty of money being a pensioner on my own and I'm very careful about the phone calls I made."

She tries to avoid using her phone to keep her costs down because she is struggling to pay her bills, so her children phone her rather than let her call them.

She might have to use the 118 telephone service in an emergency, as a last resort. But she will never connect the call again.

"It's absolutely terrible what it costs you for that service. There are people worse off than me and if they were forced to make that call it could be even worse for them."

"I was very angry and how was I to pay that bill?"

Respondent 10

Gender: female

Age: 76-80

Socio-economic group: DE

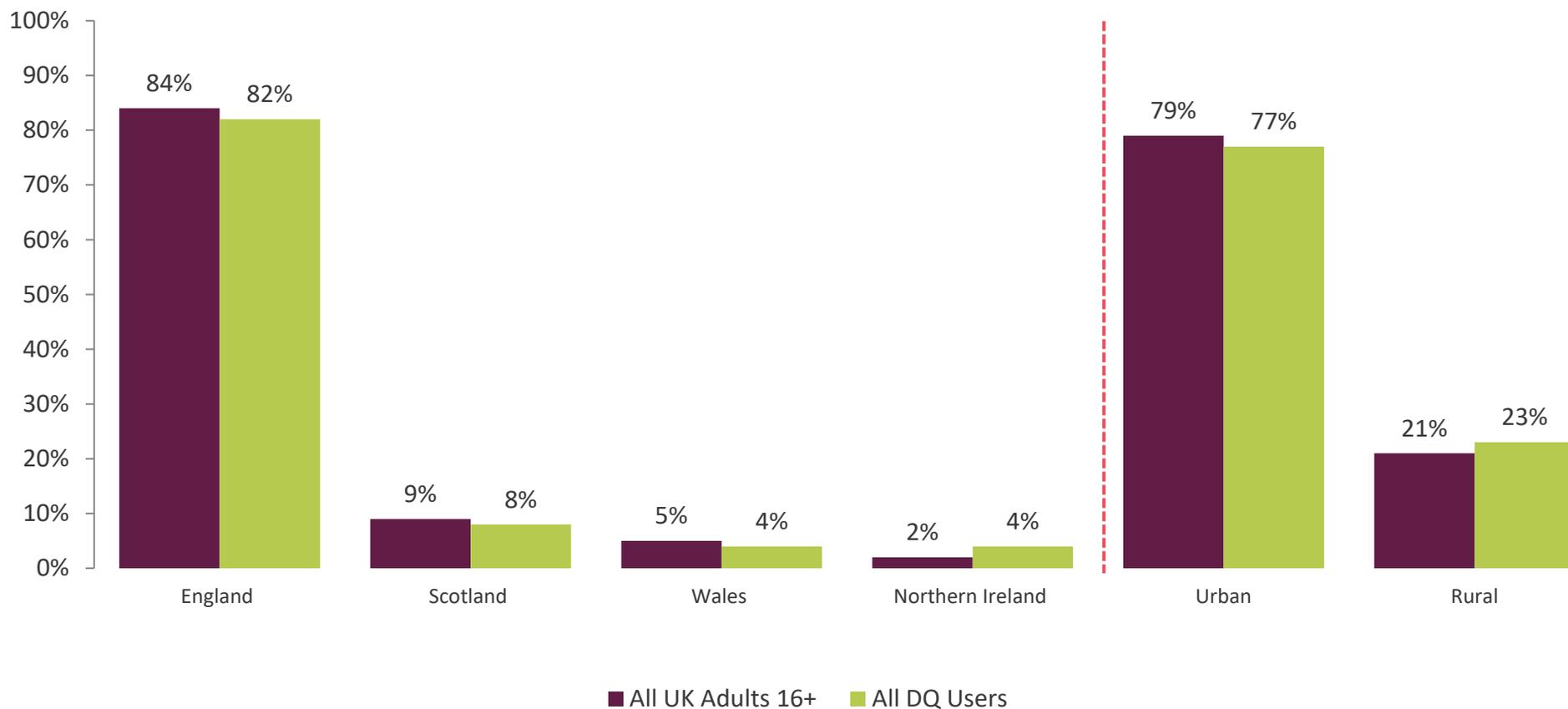
Lives in Scotland.

She has no internet access

Annex B: Personal DQ users sample demographics

Demographics of respondents

Demographics – All UK Adults 16+ (n=12,678) and Personal DQ Users (n=326)



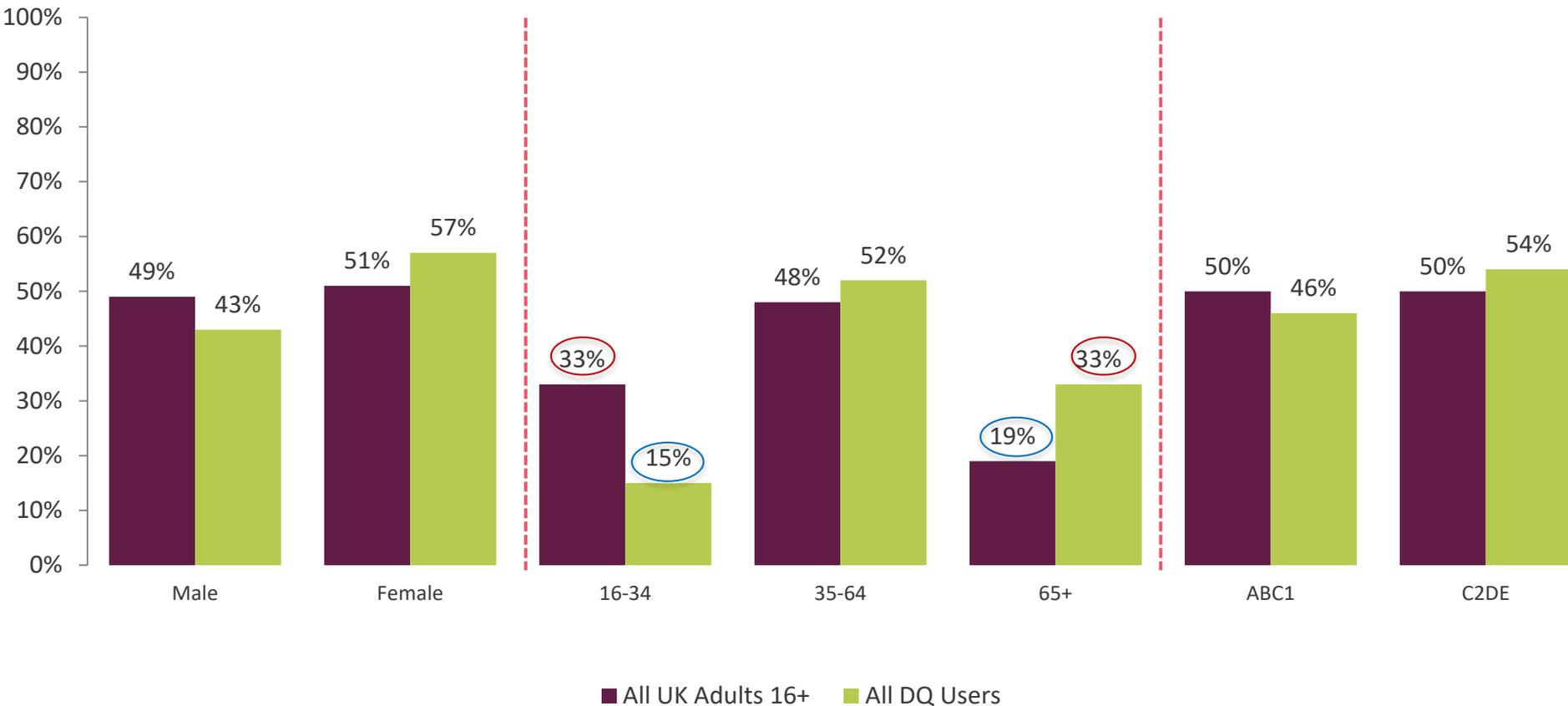
Source: Directory Enquiries Survey Nov/Dec 2017 UK Adults 16+

Base: All UK Adults 16+ (12,678), All personal DQ users (326)

Weighted demographics

Demographics of respondents

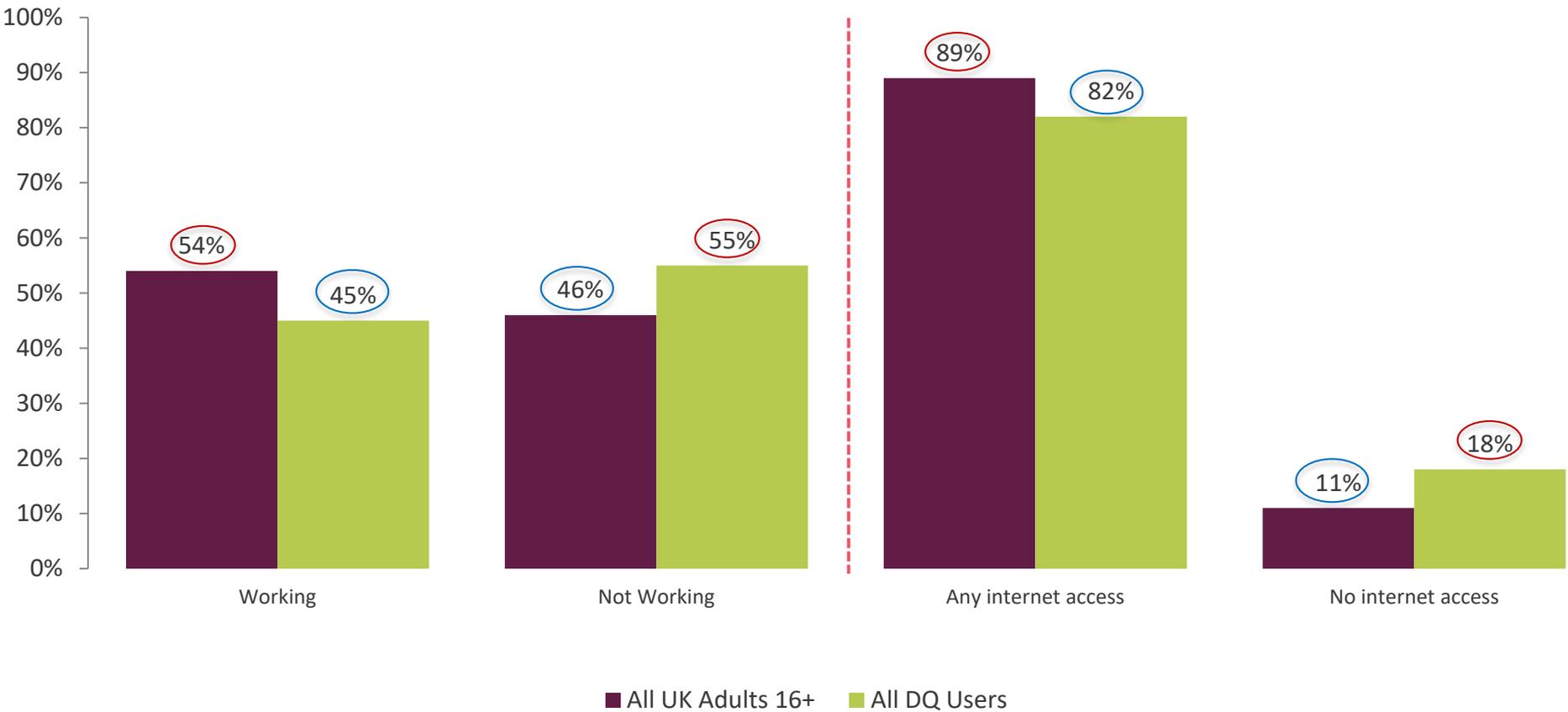
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