Directory Enquiries

Mystery shopping

Market research report

bdrc continental

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Contents

1. Executive Summary

1.1 Background to the research

Ofcom has commissioned Mystery Shopping research looking at the information callers are given when they ring a 118 Directory Enquiries service. For more detail on the background to this research, please see Section 2.

1.2 Research method and sample

In total 700 mystery shopping calls were conducted by BDRC-Continental, 100 for each of 7 DQ providers listed below:

- Yell (118 247)
- The Number (118 118)
- BT (118 500)
- Maureen (118 212)
- Telecom 2 (118 018)[1]
- O2 (118 402)
- TalkTalk (118 111)

Calls were spread over different times of day and days of the week, with quotas set across these periods to be broadly reflective of average DQ call volumes. Each DQ provider was asked the same list of business numbers in order to be consistent and comparable. Half the calls were made via a mobile and half from a landline. Instructions to either decline or accept the use of 'Call Connect' were given to shoppers and the split by DQ was also 50:50. Information provided during the call and call timings were recorded by the shopper immediately after the shop had taken place. For more detail on the method of the research, how the data is presented in the report and any caveats on the data, please see Sections 3, 4 and 5.

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[1] Since the exercise was completed, Telecom 2 have advised us that they have changed their wholesale supplier.

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1.3 Research objectives

The focus of the Mystery Shopping was to measure information provided to shoppers during the call related to the price of using the service and how numbers were provided. More specifically:

- What information was provided to them during the call related to the price of the call and of the 'Call Connect' service (where applicable)?
- When this information was provided?
- Whether they were provided the number they requested, how it was provided and when it was provided during the call?

1.4 Key findings

Overall context

In almost all the shops, the caller was able to reach the DQ provider and the DQ was able to find the number that was requested. All calls reached the DQ on the 1st, 2nd or 3rd attempt other than on 10% of calls to Telecom 2, which were not successful. The business number requested was found in 99% of shops.

'Call Connect'

All findings below relate to the information provided on 'Call Connect' calls, i.e. where the customer is put through directly to the business they are enquiring about.

1. The 'Call Connect' service **was offered** in 95% or more shops (where DQ contact was successful and the business number located) for all DQ providers other than Telecom 2, where the proportion was 58%. *This lower incidence for Telecom 2 means that it has not been possible to comment separately on findings for this DQ for 'Call Connect' as the base size is too low.*

2. Almost all (96%) of shoppers using the 'Call Connect' service **were told how much the service would cost** and this was at a similar level between the different DQ providers.

3. Information about the cost of using 'Call Connect' was **not given at the same point** in the call, there were differences between providers:

   - Almost all the callers to Yell, The Number and TalkTalk said that cost information was given to them after they agreed to use the service (94%, 94%, 90%).
   - In calls to Maureen and O2, costs were sometimes provided before the caller agreed to use the service (33% Maureen, 31% O2) and for BT 118 500 this happened in the majority (66%) of calls.

4. The **delivery of** pricing information during the 'Call Connect' call differed by DQ provider:

- Yell, The Number and TalkTalk gave pricing information via recorded message the majority of the time (96% The Number, Yell, 98% TalkTalk).
- BT 118 500, Maureen and O2 always gave pricing information via an operator.

5. In almost all calls (93%), where shoppers were using the 'Call Connect' service, they were **also given the number** of the business. This was similar by DQ provider, although **all** callers (100%) to Yell and TalkTalk were given the number. Almost a third (30%) of calls via a mobile were texted the number but were not provided the number during the call. Not all providers conveyed the number in the same way:

- Yell gave the number during the call in all shops, with TalkTalk (98%), and The Number (94%) at almost this level. The proportion for BT 118 500, O2 and Maureen was 72%, 73% and 78% respectively.
- Almost all calls to Yell, The Number and TalkTalk were given the number via an automated message (100%, 90%, 96%). This mirrors how pricing information was delivered by these DQ providers.
  - Conversely, receiving numbers via an automated message was less commonly noted by shoppers of BT 118 500, Maureen and O2 (4%, 11%, 6% respectively).

- Numbers tended to be provided **after** 'Call Connect' pricing information was given. This was the pattern for the majority of DQ providers (78%). Maureen and O2 were the only providers where the number was more, or as likely to be given **before** pricing information (56%, 50% respectively).

Non- 'Call Connect' calls

The information below was recorded in calls where the 'Call Connect' service was not used, i.e. it was declined or not offered during the call.

1. Almost universally (99%), the **number** of the business requested was given to shoppers not using the 'Call Connect' service, **during the call**. And the number was provided by some means in all these calls.

   - Unlike the 'Call Connect' shops, however, there was **more consistency** in the delivery of the number between the DQ providers, which was in the vast majority of cases read **via an automated message** (range: 94% Yell, Maureen to 100% O2, The Number).
   - The exception was 'Telecom 2' where numbers were more frequently read by an operator than via an automated message (61% vs. 39%).

2. In 86% **of calls to BT 118 500** where 'Call Connect' was offered but declined, the shopper had been provided with information about the cost of using the service. But BT 118 500 was not typical, and for other DQs the proportion was between 0% and 4%.

Other pricing information

The only pricing information noted by shoppers, other than that relating to the 'Call Connect' service, was given by Vodafone on calls from Vodafone mobiles **prior** to the call to the DQ being connected. This message stated that the number dialled would be at a premium rate and that there was an access charge. All other calls were made via BT landline which had no pre-call message.

Timings of calls

Timings were collected in all shops where the caller was able to reach the DQ.

1. Most calls were answered by DQs in 1-2 seconds (69%), the exception was Telecom 2, where 20% of calls were picked up in this timeframe.

2. The total median average call length was 44.47 seconds, with some variation between the DQ providers, ranging from around 39 seconds for Maureen and O2 to 54 seconds for Telecom 2. It should be noted that the time measurement for all 'Call Connect' calls ended on the first ring of the connected call.

   - Calls to Telecom 2 were almost twice as likely to last over a minute (40% vs. 22% of the total number of calls).
   - There were no pattern of difference in the length of the call by pricing band, and this was true for both 'Call Connect' and non-'Call Connect' calls. However, non-'Call Connect' calls were on average (median) 5 seconds shorter (41.25 secs vs. 46.5 secs).

Rating of call

The measures outlined below were based on the opinions/ judgements of shoppers (and are therefore subjective).

1. Three in five (59%) shoppers felt that they had an '**opportunity to decline**' using the 'Call Connect' service once they had been provided information relating to the cost of the service.

   - This was higher for BT 118 500, Maureen and O2 (92%, 73%, 89% respectively). It should be noted that all of these providers were more likely to give cost information in advance of the caller agreeing to use the service (than other DQs), and all conveyed cost information via operators.

2. The majority of 'Call Connect' shoppers (91%) felt that they had been provided with **sufficient time in order to note down the number** if provided.

   - Callers to Maureen were less likely to feel this was the case (75%), and though not significantly different to the total, the proportion for BT 118 500 and O2 was below other DQs (BT – 86%, O2 – 78%). As noted earlier, shoppers recorded that for these DQs, numbers were often read to them by operators.

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- Whilst the majority of those who were read the number felt that they had sufficient time to note it down (79%), this was not as high as the proportion given the number via automated message (98%).

3. Where provided, information relating to the **cost** of the 'Call Connect' service was '**clear**' for almost all shoppers (95%), with 40% finding information 'extremely clear' and 55% 'quite clear'.

   - Shoppers who were given the cost of 'Call Connect' **before** they accepted using the service were more likely to find it was 'extremely clear' than those given the information after they agreed to use the service (59% vs. 35%).

4. Four in five (82%) felt that the call was either 'extremely' (22%) or 'quite efficient' (60%). Calls to The Number and Telecom 2 were **less likely** to be rated as 'extremely efficient' (11%, 6% respectively).

   - Reasons for not finding the call to be 'efficient' most frequently included delays or difficulties finding the number.

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2. Background and objectives

2.1 Objectives

Prices for calls to DQ services have risen significantly in recent years. In May 2017, Ofcom opened its Call Cost Review to examine the rising cost of calling DQ services. As part of this review Ofcom has conducted Mystery Shopping research looking at the information that callers are given when they ring a 118 DQ service. Specifically, research was commissioned to:

- Establish what services were offered to customers
    - i.e. provision of number and/ or 'Call Connect' service (where the customer is put through directly to the business they are enquiring about)
- How customers are provided numbers
    - i.e. by automated message, by an operator, by text
- What pricing information is provided to customers during the call
    - i.e. for using the DQ service, for using 'Call Connect'
- The point at which pricing information and the number is provided to customers during the call

The results of this research are outlined in this document, alongside detail of how the research was conducted.

3. Summary of research method

3.1 Overview

In total, 700 calls were made. 100 calls were made to each DQ provider with quotas by DQ provider set by:

- Time of day
- Day of week
- Means of making call (i.e. Landline/ Mobile)
- If 'Call Connect' service (see section 2.2 for definition) to be accepted or declined

A short questionnaire was completed **immediately** after the call had been made, which captured what information and services had been offered during the call, and at what point.

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Calls were made from 30th November to 21st December 2017, with some minor additions on w/c 1st January 2018.

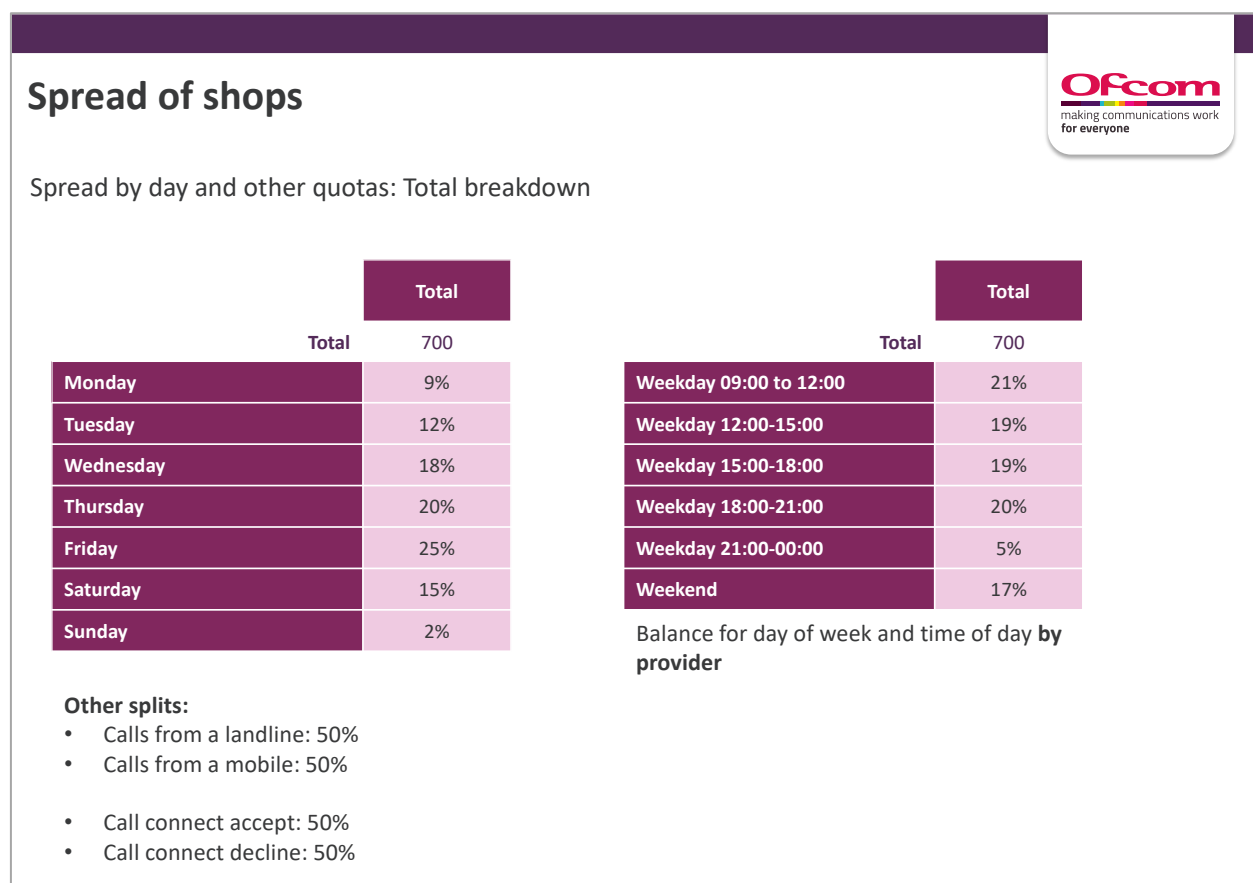## 3.2 Sample structure

The following DQ providers were included in the research:

- Yell (118 247)
- The Number (118 118)
- BT (118 500)
- Maureen (118 212)
- Telecom 2 (118 018)
- O2 (118 402)
- TalkTalk (118 111)

The spread of shops by day of week and time of day is shown in Figure 1.

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Figure 1

Spread of shops

Spread by day and other quotas: Total breakdown

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	Total
Total	700
Monday	9%
Tuesday	12%
Wednesday	18%
Thursday	20%
Friday	25%
Saturday	15%
Sunday	2%

	Total
Total	700
Weekday 09:00 to 12:00	21%
Weekday 12:00-15:00	19%
Weekday 15:00-18:00	19%
Weekday 18:00-21:00	20%
Weekday 21:00-00:00	5%
Weekend	17%

Balance for day of week and time of day **by provider**

Other splits:
- Calls from a landline: 50%
- Calls from a mobile: 50%

- Call connect accept: 50%
- Call connect decline: 50%

3.3 Call method

Each call to a DQ followed the exact same procedure to ensure rigorous consistency. Shoppers were briefed by the research team and instructions were provided to support the questionnaire (both the questionnaire and instructions can be found in Appendix A). Researchers worked closely with the fieldwork team at all times.

Shoppers worked across all the different DQs. Each DQ supplier was contacted 100 times. Each contact was to request a different business number, and all DQs were asked for the same 100 business numbers. Business numbers were selected to be easy to find, and to read out, and were as specific as possible to a business branch or location. All businesses selected were chains that would expect to receive calls, in order to avoid causing any inconvenience. A mix of businesses that used geographic and non-geographic numbers were included.

Calls were spread over different days of the week and times of day, throughout the fieldwork period. This was in order to reduce the chance of detection and to also avoid any unrepresentative burden on DQ services. The list of 100 businesses was asked in a different order for each DQ.

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Shoppers were instructed to accept 'Call Connect' if it was offered in 50% of calls. However, they were told not to specifically prompt for any service or piece of information, e.g. use of the 'Call Connect' service.

All calls were made using the BT and Vodafone network. There was a split by DQ provider of 50% mobile and 50% landline calls.

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4. How findings are presented in the report

This section outlines the sample sizes achieved and provides information about the groups that are used in the report for analysis and the number of shops that were conducted within these groups. For more detail on the overall robustness of the research please see Section 5.

4.1 Data points shown and overall sample

Findings are shown for each measure by individual DQ provider and also by:

- Total – This is based the total number of calls (shops)
- 'Higher cost' – This is the total for DQs where pricing of service is at the higher end of the range for DQs (The Number, Maureen). Cost for 2 minute call: The Number - £13.47, Maureen: £13.47
- 'Mid cost' – This is the total for DQs where pricing is in the middle of the range for DQs (Yell, BT 118 500). Cost for 2 minute call: Yell - £8.25, BT - £8.25[2]
- 'Lower cost' – This is the total for DQs where pricing is at the lower end of the range for DQs (Telecom 2, O2, TalkTalk). Cost for 2 minute call: Telecom 2 - £4.00[3], O2 - £3.00, TalkTalk - £3.87

See Figure 2 for a detailed breakdown. Please note that this shows the **overall total** number of shops. Many measures in the report are based on a subset of this total. For example, measures about 'Call Connect' are frequently based on shops where 'Call Connect' was accepted. Therefore, base sizes (which show the number of shops) vary on charts. Findings are only shown where figures are based on 30 or more shops. Bases that are lower than 100 are highlighted at the bottom of the chart with an *. Percentages based on fewer than 50 shops are denoted with ** and should be treated as broadly indicative only.

It was not possible to show findings for Telecom 2 for 'Call Connect' calls as the number of calls was below 30. Therefore, during the report where there is commentary around that data Telecom 2 is excluded.

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[2] Since undertaking this research BT has reduced the price of its 118 500 service.
[3] Telecom2 have more than one DQ number. The number used in this mystery shop was set at a relatively low price point. However, references are made in the June 2018 Consultation to the fact that Telecom2 currently provide other DQ numbers, including one set at the highest price point that works out at £23.97 for two minutes.

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Figure 2

Sample structure for reporting and numbers achieved

Number of shops: Total breakdown

	Total	High cost	Mid cost	Low cost
Total	700	200	200	300
Yell (118 247)	100	-	100	-
The Number (118 118)	100	100	-	-
BT (118 500)	100	-	100	-
Maureen (118 212)	100	100	-	-
Telecom 2 (118 018)	100	-	-	100
O2 (118 402)	100	-	-	100
TalkTalk (118 111)	100	-	-	100
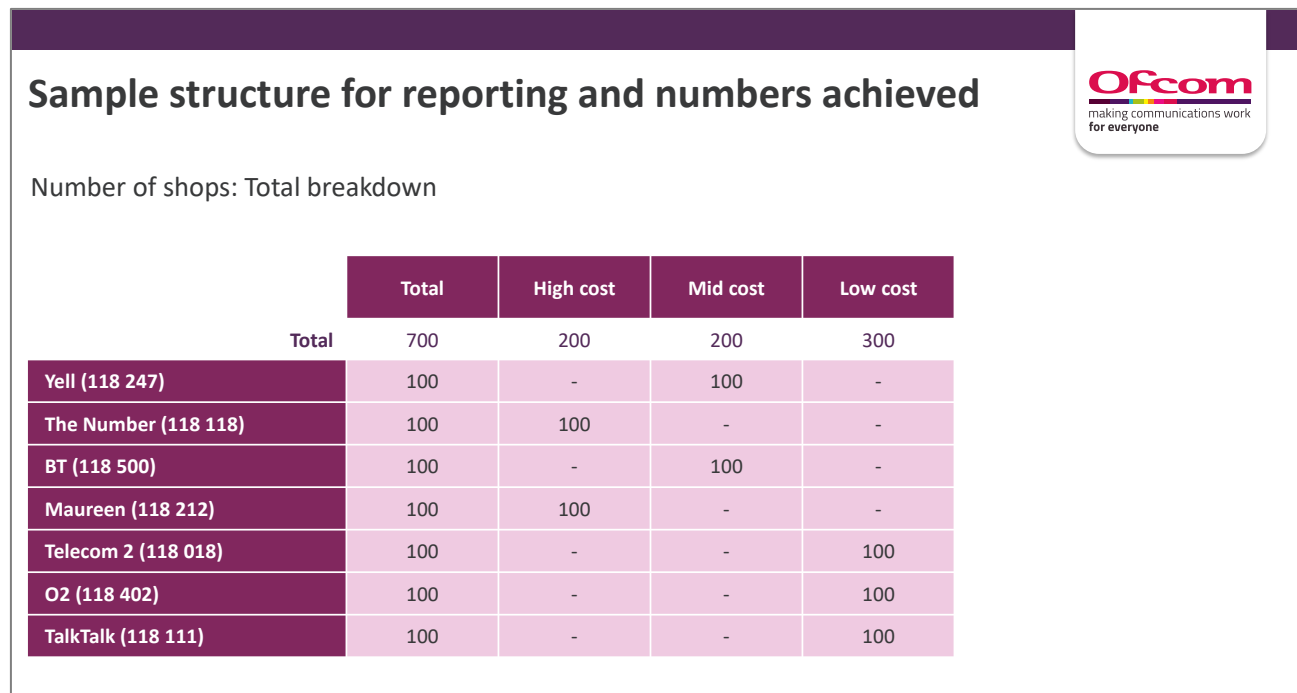
4.2   Significance testing

Findings in the report for individual DQs and the groups of DQs have been tested <u>against the total</u> and are highlighted where there is:

◯ 95% confidence that result is higher than the total

◯ 95% confidence that result is lower than the total

5. Caveats and Limitations of the research

This section outlines the rationale for the chosen research method and any caveats or limitations that need to be considered with the findings.

5.1 DQ providers included in the research

Not all DQ providers are included in this research. Providers selected were those likely to generate large enough call volumes to ensure that the mystery shopping calls would not be detected within the designated fieldwork period. Also, to ensure there was no undue burden on suppliers included.

DQ providers were also selected in order to reflect the range of prices available to DQ service consumers and size of operations. Therefore, one of the DQ providers is relatively smaller than the others in terms of volumes. DQs providers in the research are available to all consumers (i.e. not just customers of a particular mobile network).

5.2 Business numbers asked for in the research

As outlined in Section 3.3, shoppers asked for the same list of business numbers for each DQ provider. These numbers were selected in order to be: easy to find; specific; chains and businesses that expect calls at all hours that fieldwork took place.

The research was designed to capture information about **how** numbers were provided and **what** pricing information related to the DQ service was given during the call. The research was **not** designed in order to test accuracy of numbers provided, or to test more challenging numbers to locate.

5.3 What the data represents

The 'total' in charts (see Section 4 for a more detailed explanation) is **not** a sample representation of the whole DQ sector. This means that the results cannot be used to illustrate the overall experience of DQ consumers. When looking at results by pricing bands the reader also needs to be aware that they may be skewed by an individual DQ's performance and that these results are also not fully representative of the DQ services **within** those bands.

The data represents mystery shoppers' reported experience .

Quotas were imposed so that half the calls made were via mobiles and half via landlines. This may not reflect the proportions for DQ providers in terms of actual call volume. Similarly, 'Call Connect' was accepted in 50% of calls (if offered) and this may differ from the proportion of actual calls to DQs where the service is used.

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5.4   Degrees of confidence in the data

The overall sample (base size) for an individual DQ provider is 100. However, not all shoppers were able to reach the supplier, and, as per their instructions, not all shoppers agreed to the 'Call Connect' service. Therefore, many base sizes are below 100 and frequently just below 50. Degrees of confidence in a quantitative sample of this size can be +/- 11, so differences between results may not always be *statistically significant* (see 4.2).

5.5   Time measurements

Call times are provided in the report – both for the time that DQs took to answer a call and the duration of a call. These may not reflect actual call data from DQs. Times in the research were recorded **manually** by shoppers with clear guidelines on how to take those measurements. Calls were all based on a list of businesses which were designed to be straightforward to find and hence may not be typical of the average call profile for DQs. More challenging number requests would likely impact overall timing of calls.

5.6   Subjective ratings

There are several measures in the report which are subjective in nature – i.e. they are based on the interpretation of the shopper. These include:

- Whether there was an opportunity to decline the use of 'Call Connect' once pricing information had been provided.
- Whether there was sufficient time to record a number.
- Whether information provided on 'Call connect' pricing was clear.
- Rating of overall speed and efficiency of the call and the reasons behind the response if it was not considered to be efficient.

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6. Main findings

6.1 Context to findings

This section explores the proportion of shoppers that were **able to get through** to a DQ supplier and the success that the DQ suppliers had in **locating the number** requested. The research was not designed to specifically capture this information. However, they provide important contextual information to the findings, in that they impact on whether it was possible to record information about what was provided during the call.

6.1.1 Whether shoppers got through to the DQ supplier

Shoppers recorded whether they were able to reach the DQ supplier on the 1st, the 2nd or the 3rd attempt of trying. If calls rang out for 60 seconds **without** being answered this was classified as a 'failed' attempt and the shopper called again later. No further attempts were made if the 3rd call was **not** answered within 60 seconds.

The percentages at the top of the bars in Figure 3 show the overall proportion of calls to DQ providers that were successful, i.e. that were answered on either the 1st, 2nd or 3rd attempt. Of the total number of mystery shopping calls that were made, 99% were successful. **All** the calls that were unanswered by the 3rd attempt was for Telecom 2. After three attempts 10% of calls to Telecom 2 resulted in the shopper **not** getting through to the service.

Not all calls were answered on the first attempt. In total, 9 in 10 calls were successful on the 1st attempt and this ranged from 60% of calls for Telecom 2 to 100% of calls for BT 118 500. After the 2nd attempt 96% of mystery shopping calls were successful and this ranged from 76% for Telecom 2 to 100% for BT 118500, Yell, The Number and TalkTalk.

All calls were answered by an operator.

Figure 3
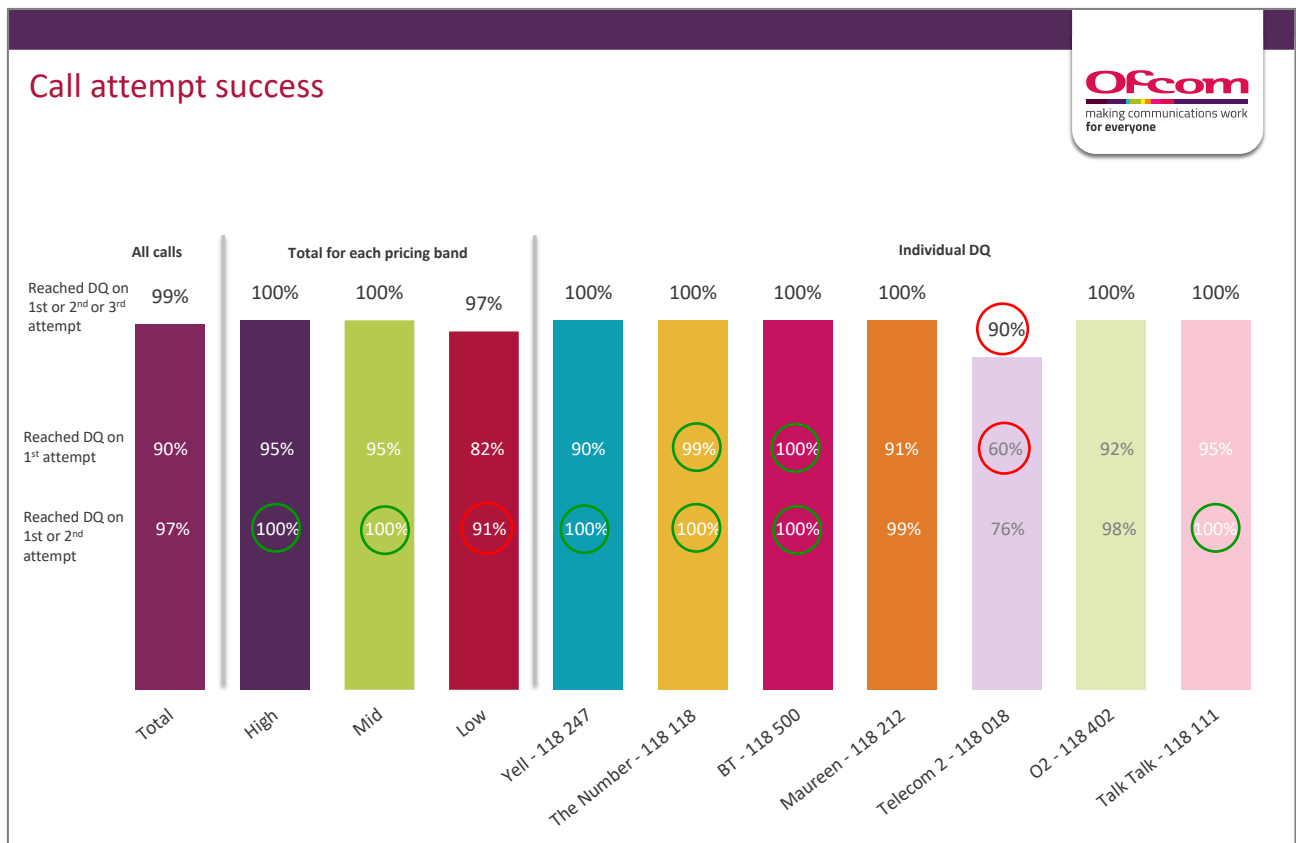
Question: Attempt 1+2+3

Base: All shops. All: 700, High: 200, Mid: 200, Low: 300, Yell (118 247): 100, The Number (118 118): 100, BT (118 500): 100, Maureen (118 212): 100, Telecom 2 (118 018): 100, O2 (118 402): 100, TalkTalk (118 111): 100

6.1.2   If number found or 'Call Connect' offered

Number located

As shown in Figure 4, in almost all calls (99%) the number requested by the shopper was supplied, and this was broadly similar between DQ providers. It should be noted that, as outlined in Section 3.3, business numbers requested in the research had been selected to be 'easy/straightforward' to find. Two businesses were substituted during fieldwork as three DQ providers were unable to locate the number.

This measure is not attempting to reflect on the quality of service provided by the DQs; rather it shows that the findings of this research are based on shops where, in almost all cases, numbers were successfully located by DQs.

Figure 4

Q5: Were you provided with the number and/ or call connect in response to your request?
Base: All who got through to DQ provider. All: 690, High: 200, Mid: 200, Low: 290, Yell (118 247): 100, The Number (118 118): 100, BT (118 500): 100, Maureen (118 212): 100, Telecom 2 (118 018): 90*, O2 (118 402): 100, TalkTalk (118 111): 100   *LOW BASE SIZE: <100
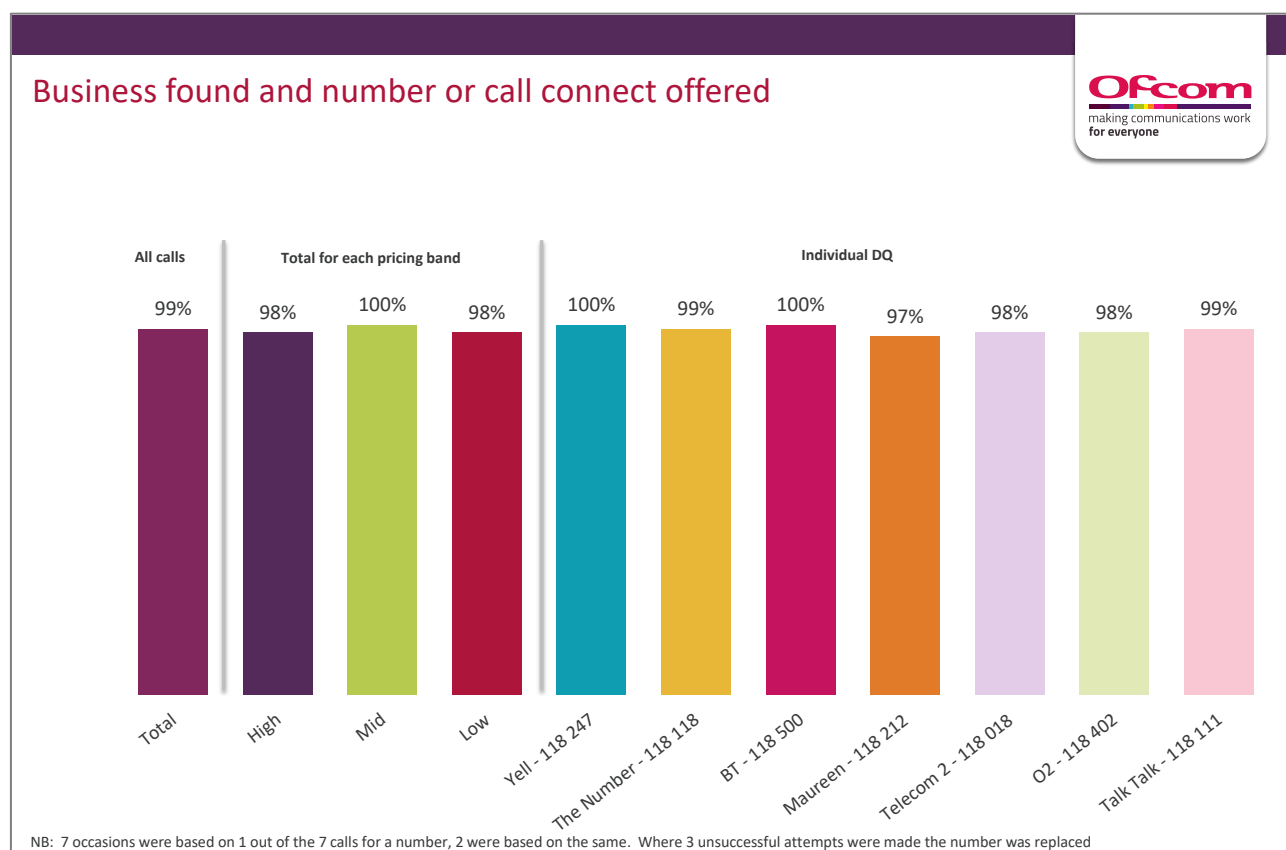
'Call connect' offered

In the vast majority (92%) of calls, shoppers recorded that they were offered 'Call Connect', as shown in Figure 5. Callers to Telecom 2 were the **least** likely to be offered the service (58%) and calls to BT 118 500 and O2 the **most** likely at 99% and 98% respectively. These results were significantly different from the total.

Figure 5

Proportion of successful shops that were offered call connect
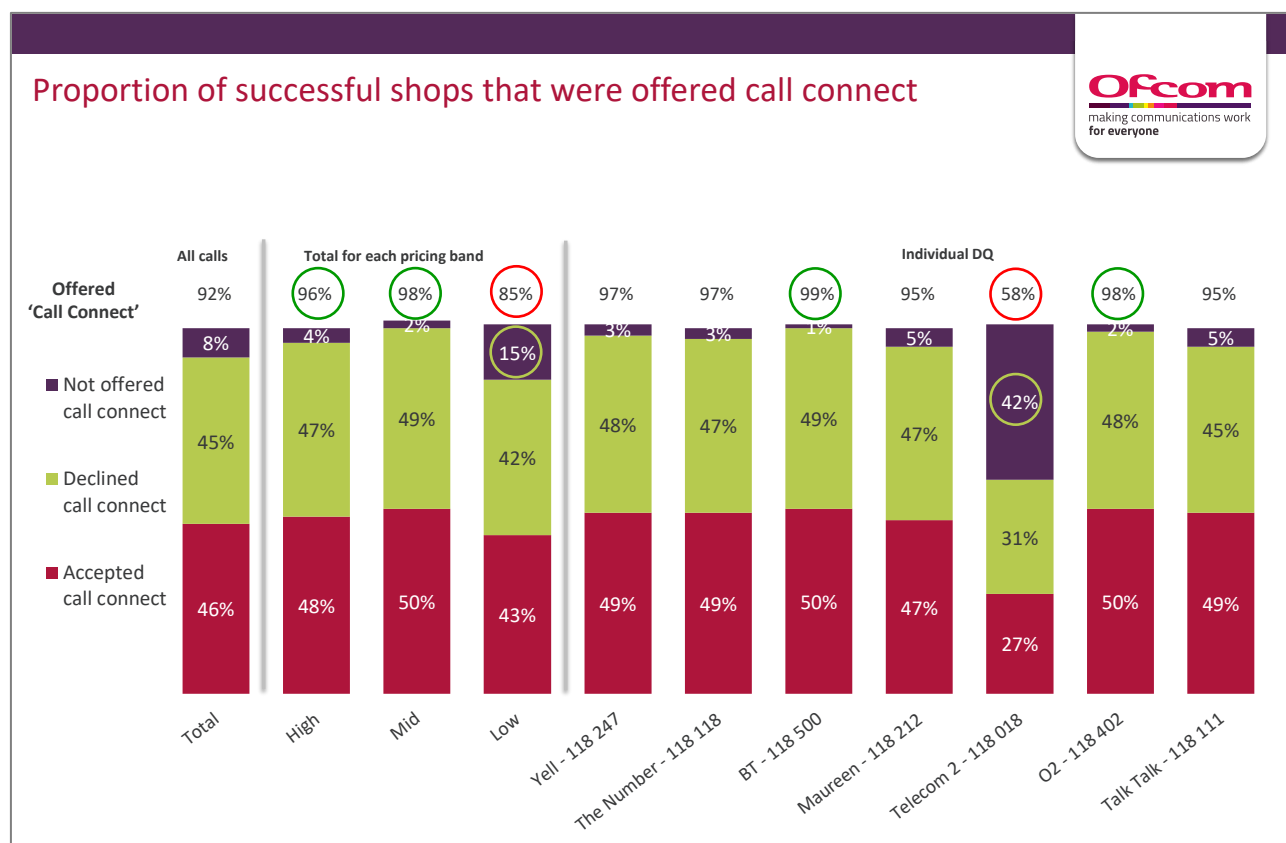
Q6. Were you offered the call connect service?
Base: All shops where shopper reached DQ service and business was found. All: 681, High: 196, Mid: 200, Low: 285, Yell (118 247): 100, The Number (118 118): 99, BT (118 500): 100, Maureen (118 212): 97, Telecom 2 (118 018): 88, O2 (118 402): 98, TalkTalk (118 111): 99 *LOW BASE SIZE: <100*

6.2 'Call Connect' experience (users)

This section is based on those shoppers who were instructed to **accept** the use of the 'Call Connect' service, if it was offered to them. Therefore, base sizes (number of calls) for individual DQs are close to 50 and results should be treated as indicative. Telecom 2 data is not included in charts due to low base size (24) and is therefore excluded from commentary.

6.2.1 Provision of pricing information

Figure 6 illustrates the proportion of shops where pricing information relating to 'Call Connect' was received during the call.

Almost all shoppers (96%) using the 'Call Connect' service were provided with information about charges for using the service, and this was consistent between the different DQ providers.

Figure 6 also shows the point during the call at which shoppers were provided 'Call Connect' pricing information. At a total level, shoppers were **more** likely to report that pricing information was provided to them *after* they agreed to use the service than *before.* In three quarters (75%) of 'Call Connect' shops pricing information was provided **after** the shopper had agreed to use the service, and in 21% of shops pricing information was given **before** the shopper had agreed to use the service.

There was some variation by DQ. Pricing information was provided *after* callers agreed to 'Call Connect' in the large majority of shops for Yell, The Number, and TalkTalk (94%, 94%, 90% respectively).

Calls to BT 118 500 were **more** likely to result in 'Call Connect' pricing information being given *before* they accepted use of the service than *after* (66% vs. 34%). And whilst not significantly different **to the total**, Maureen and O2 were also more likely to provide 'Call Connect' pricing information in **advance** of agreeing to use the service (33%, 31% respectively).

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Figure 6

If and when 'Call Connect' pricing information received during call
Base: All 'Call Connect' shops
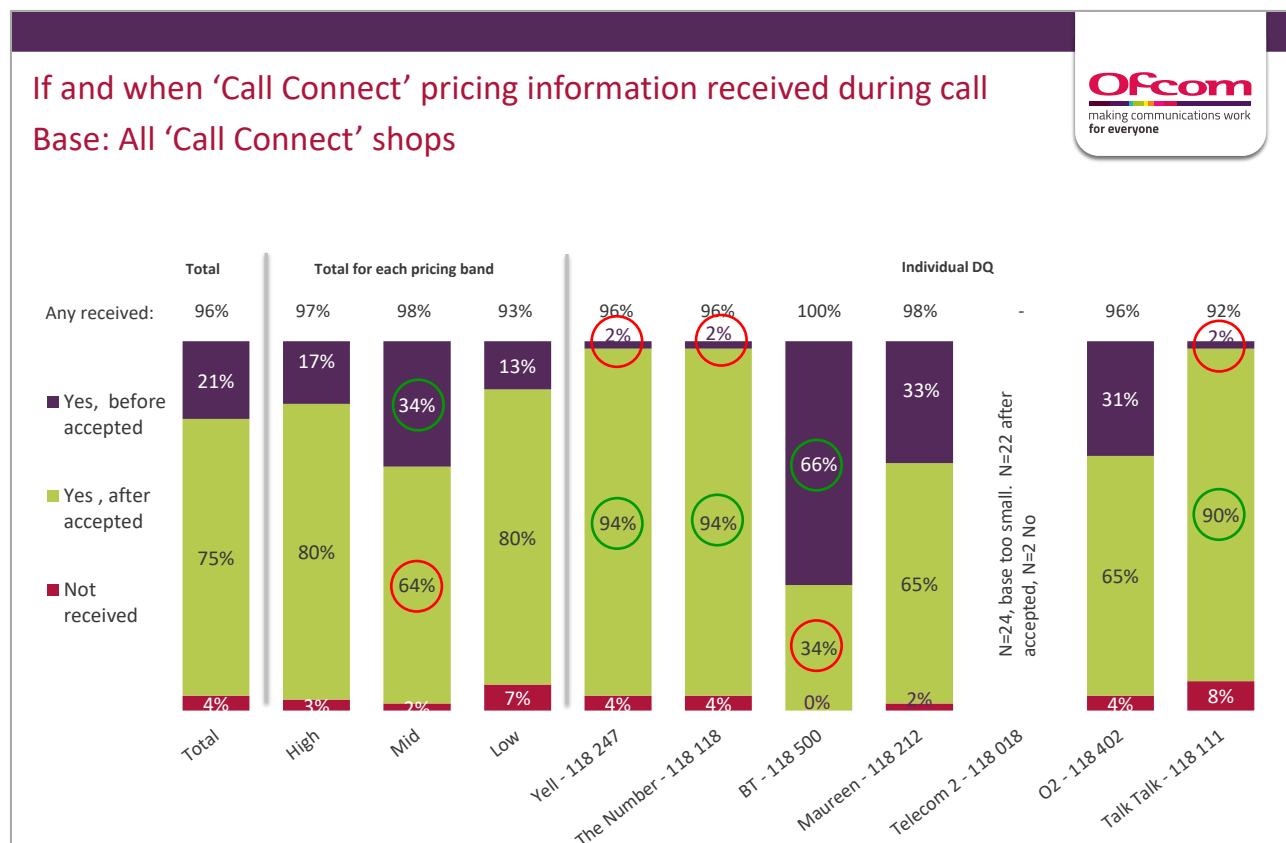
Q7. Were you given information about the call charges for call connection?

*Base: All shops where call connect was offered and accepted. Total: 316, High: 95, Mid: 99, Low: 122, Yell (118 247): 49**, The Number (118 118): 49**, BT (118 500): 50**, Maureen (118 212): 46**, Telecom 2 (118 018): 24 NOT SHOWN, O2 (118 402): 49**, TalkTalk (118 111): 49** **VERY LOW BASE, CAUTION TREAT AS INDICATIVE ONLY.*

Data represents mystery shoppers' reported experience

6.2.2 How pricing information was provided

Shoppers noted **how** they were given pricing information about 'Call Connect'. As shown in Figure 7, around half were provided pricing information from an operator (49%) and half via recorded message (51%).

Pricing information was **almost always** provided via recorded message in calls to Yell, The Number and TalkTalk (96%, 96%, 98%). Conversely, information about pricing was **always** given by an operator on calls to BT 118 500, Maureen and O2.

There was no pattern in how information was provided by pricing band.

Figure 7

How and when 'Call Connect' pricing information received
Base: All 'Call Connect' shops where pricing info was given
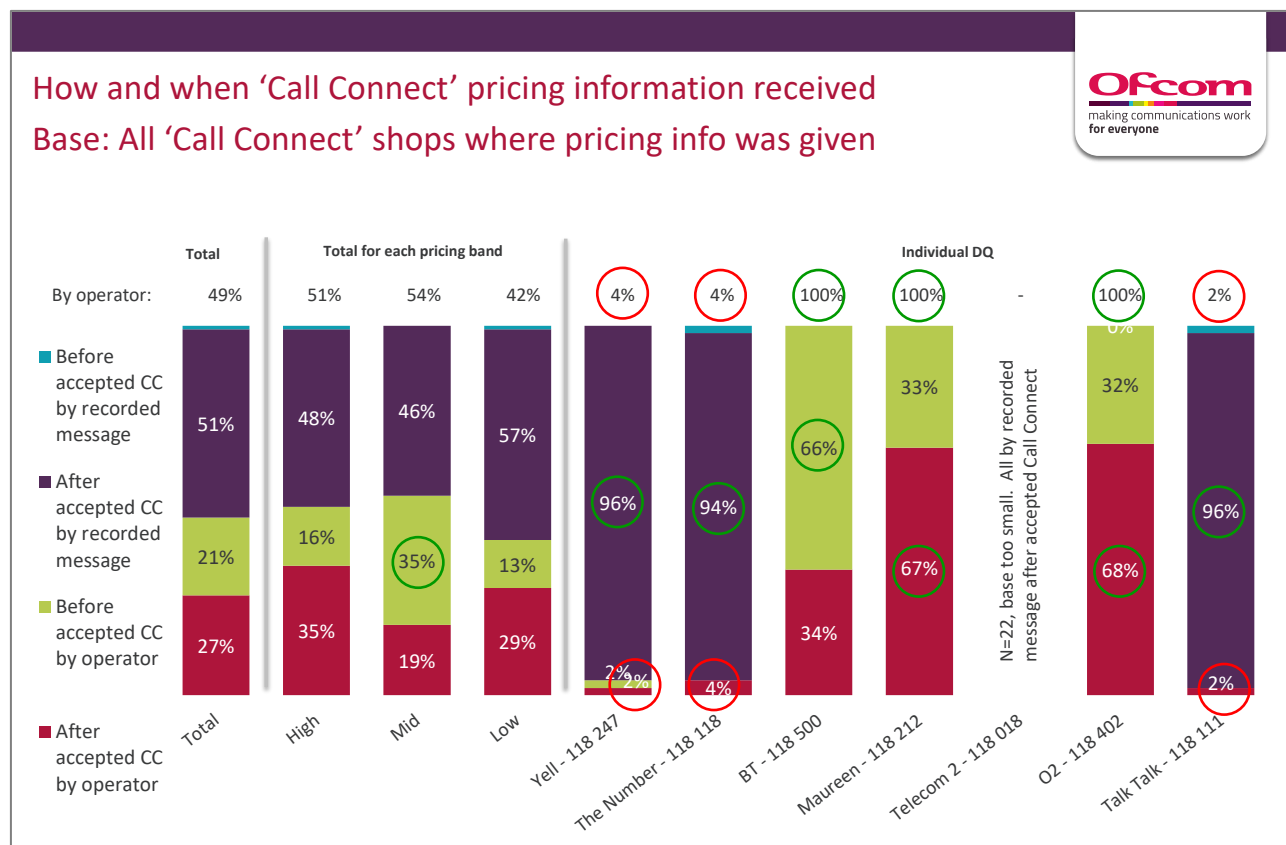
Q7. Were you given information about the call charges for call connection?/ Q8 How was information about the call charges for call connection given?

Base: All shops where call connect accepted and pricing information provided. Total: 303, High: 92, Mid: 97, Low: 114, Yell (118 247): 47**, The Number (118 118): 47**, BT (118 500): 50**, Maureen (118 212): 45**, Telecom 2 (118 018): 22 NOT SHOWN, O2 (118 402): 47**, TalkTalk (118 111): 45**   **VERY LOW BASE, CAUTION TREAT AS INDICATIVE ONLY

As illustrated in Figure 8, shoppers were more likely to be given information about pricing **after they accepted 'Call Connect'** by recorded message (65%) than via an operator (35%).

Figure 8

Means of being given pricing information
All given information after accepted 'Call Connect'

By recorded message

By operator

65%

35%
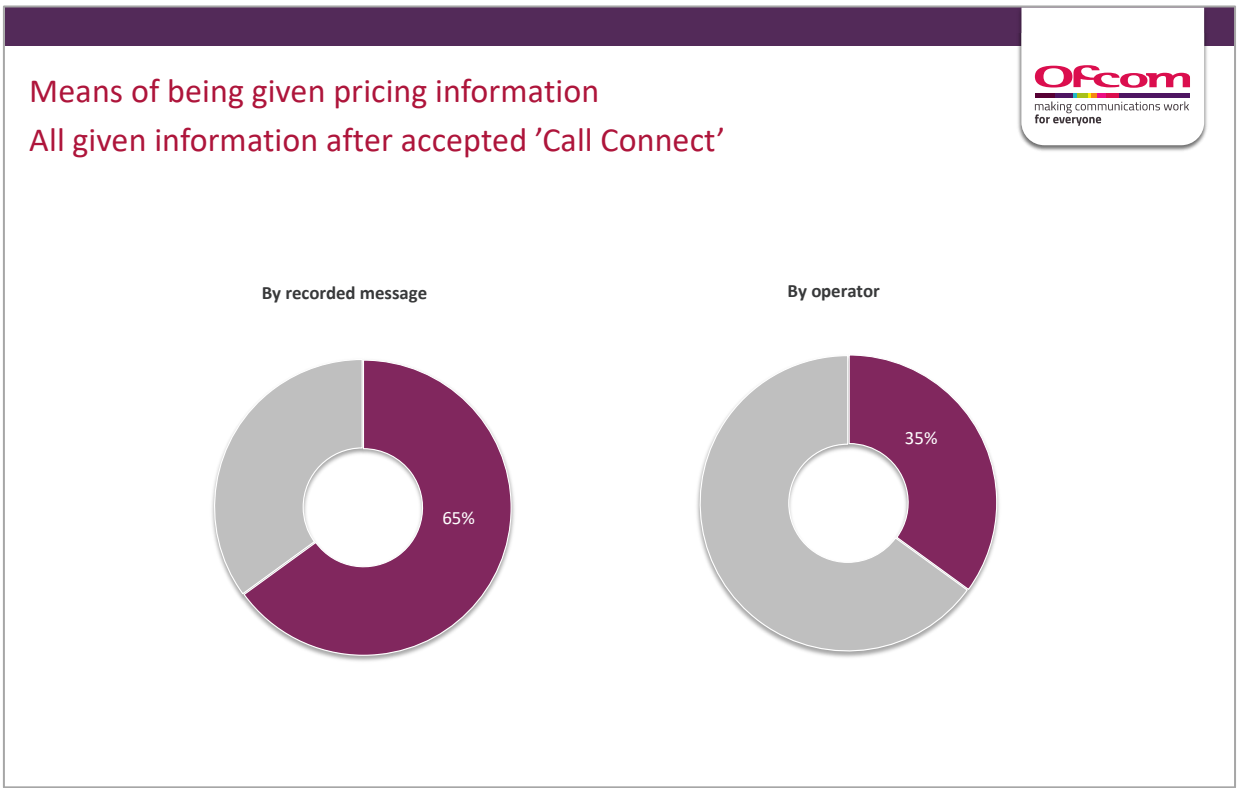
Q8 How was information about the call charges for call connection given? / Q9: In addition to call connection, were you also given the number a different way?

Base: All shops where call connect accepted and pricing information provided after CC accepted. Total 237, Landline: 151, Mobile: 86

6.2.3 Provision of number in 'Call Connect' calls

Whether the number was provided

In the large majority (93%) of 'Call Connect' shops, the telephone number for the specific business was also provided to shoppers. As shown in Figure 9, this was similarly high across the DQs (and for Yell and TalkTalk this happened in all instances).

Figure 9
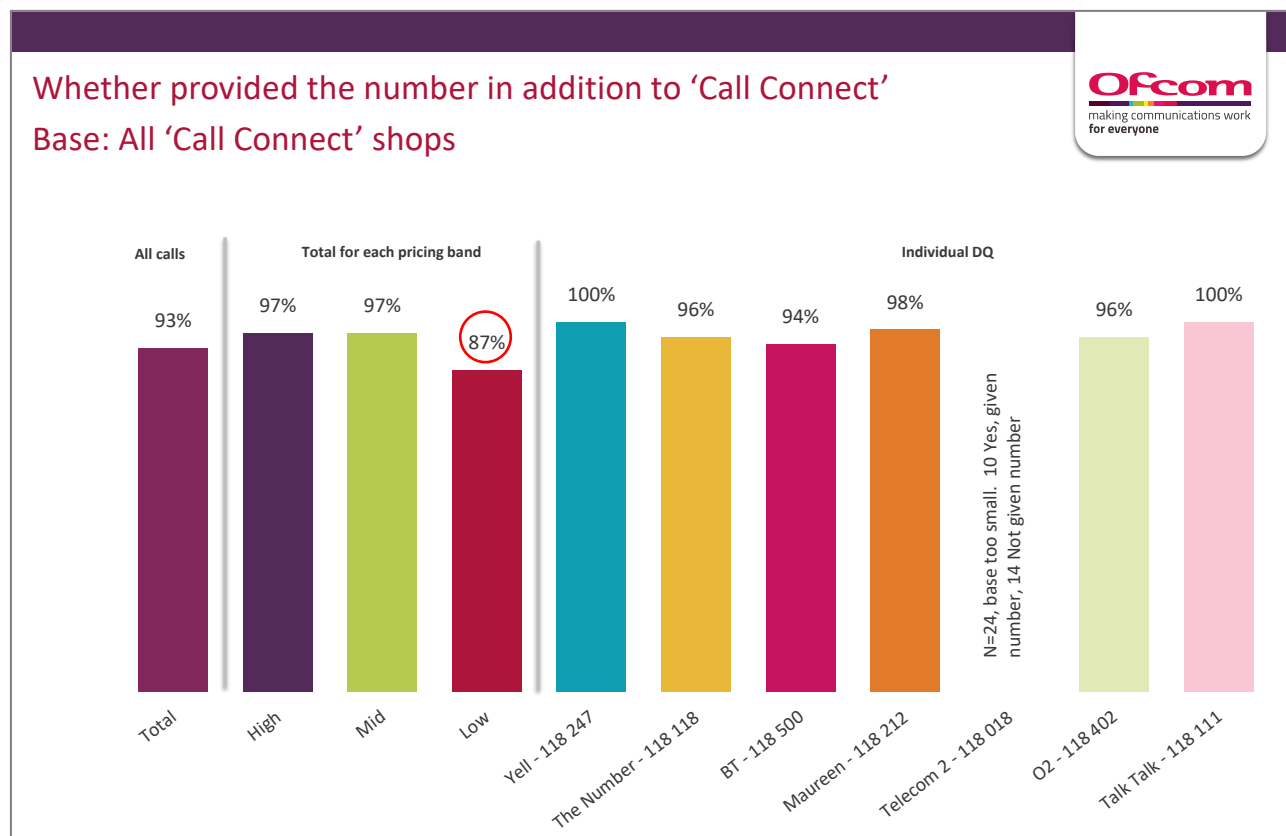
Whether provided the number in addition to 'Call Connect'
Base: All 'Call Connect' shops

Q9: In addition to call connection, were you also given the number a different way?
Base: All shops where call connect was offered and accepted. Total: 316, High: 95, Mid: 99, Low: 122, Yell (118 247): 49**, The Number (118 118): 49**, BT (118 500): 50**, Maureen (118 212): 46**, Telecom 2 (118 018): 24 NOT SHOWN, O2 (118 402): 49**, TalkTalk (118 111): 49** **VERY LOW BASE, CAUTION TREAT AS INDICATIVE ONLY

Means by which number was provided

Figure 10 breaks down the means by which the number was provided to the shopper. In total, 83% were given the number **during** the call, i.e. they were either read the number by an operator or provided with the number via automated message. Numbers were texted in 86% of all calls from mobile phones. Almost a third (30%) of mobile calls resulted in the number **only** being received via text.

Calls to BT 118 500 were less likely to result in the number being provided **during** the call (72%), significantly lower than the total; this contrasts with 100% for Yell, 98% for TalkTalk and 94% for The Number, all significantly higher than the total.

There were differences in **how** the numbers were provided during the call. Callers to Yell, The Number and TalkTalk almost always noted that they were given the number via an automated message (100% Yell, 90% The Number, 96% TalkTalk). In contrast, it was more likely in calls to BT 118 500, Maureen and O2, that numbers were read out by an operator rather than provided via recorded message (BT 118 500: 68% vs. 4%, Maureen: 70% vs. 11%, O2: 71% vs. 6%).

Figure 10

Whether provided the number in addition to 'Call Connect'
Base: All 'Call Connect' shops

	Total	Yell (118 247)	The Number (118 118)	BT (118 500)	Maureen (118 212)	Telecom 2 (118 018)	O2 (118 402)	TalkTalk (118 111)
Texted number*	86%	With the exception of 1 provider range was 81% to 94% but bases very low						
Only texted number*	30%	Bases too low to show separately						
Operator read number	33%	0%	4%	68%	70%		71%	2%
Automated message with number	50%	100%	90%	4%	11%		6%	96%
Provided number	93%	100%	96%	94%	98%		96%	100%
Provided number during the call (ie by operator/ message)	83%	100%	94%	72%	78%		73%	98%

*Based on calls made via mobile

Q9: *In addition to call connection, were you also given the number a different way?*
Base: All shops where call connect was offered and accepted. Total: 316/111, Yell (118 247): 49/17**, The Number (118 118): 49*/17**, BT (118 500): 50*/18**, Maureen (118 212): 46*/16**, Telecom 2 (118 018): 24*/8**, O2 (118 402): 49*/17**, TalkTalk (118 111): 49*/18** *VERY LOW BASE, CAUTION TREAT AS INDICATIVE ONLY ** NOT SHOWN*
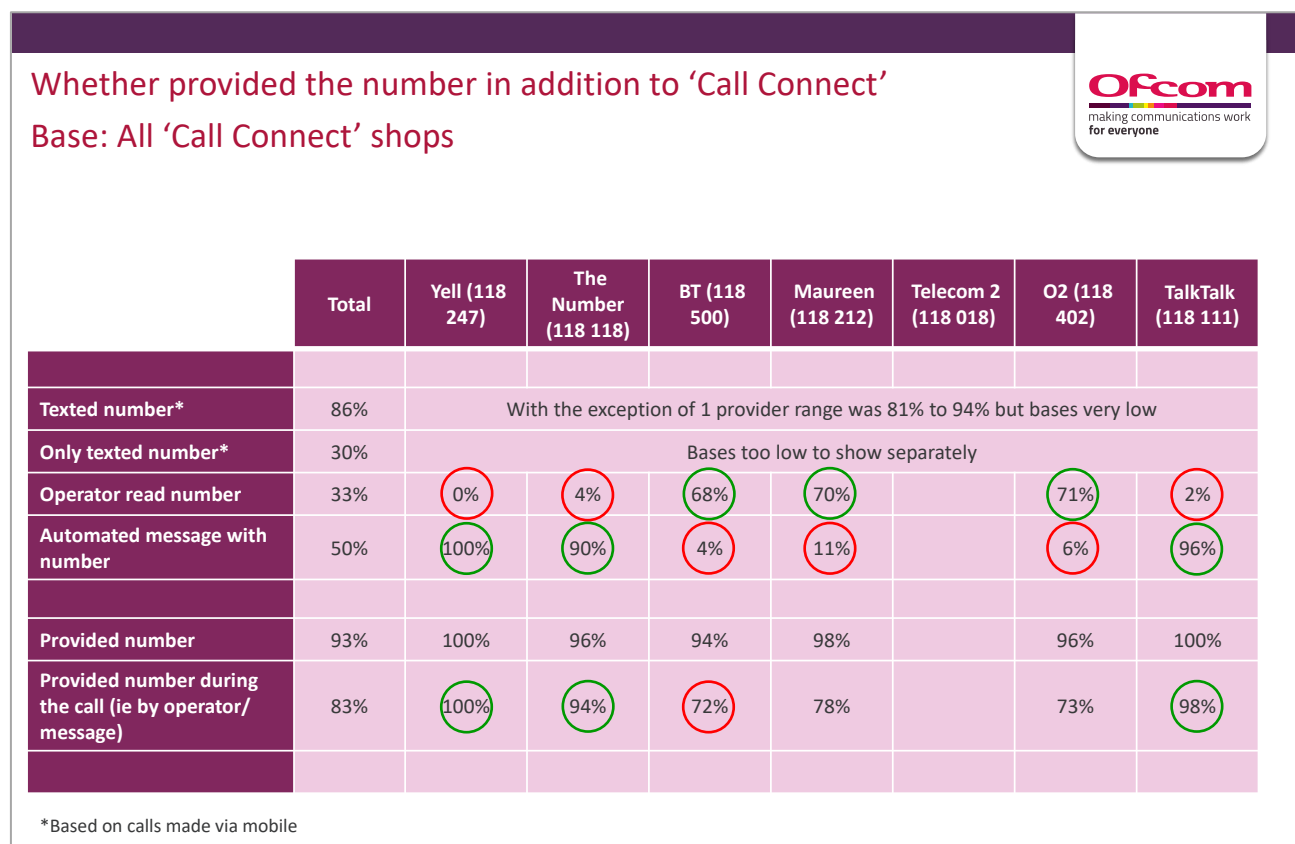
Point at which number was provided during the call

Shoppers who were additionally given the number **during the 'Call Connect' call** were asked to record the point at which it was provided, and this is illustrated in Figure 11. In just 2% of calls shoppers were given the number **before they were offered** the 'Call Connect' service, 19% were given the number **before they were provided pricing information** for 'Call Connect' and for 78% it was given **after they received the relevant pricing information**.

Calls to Yell, The Number, and TalkTalk, were significantly **more likely** than the total to be given the number **after** pricing information was provided (96%, 91%, 92% respectively).

Calls to Maureen and O2 were significantly **more likely** than the total to be provided the number **before** they were given pricing information, but this was not in the large majority of shops (56%, 50% vs. 42%, 50% after pricing info).

Figure 11
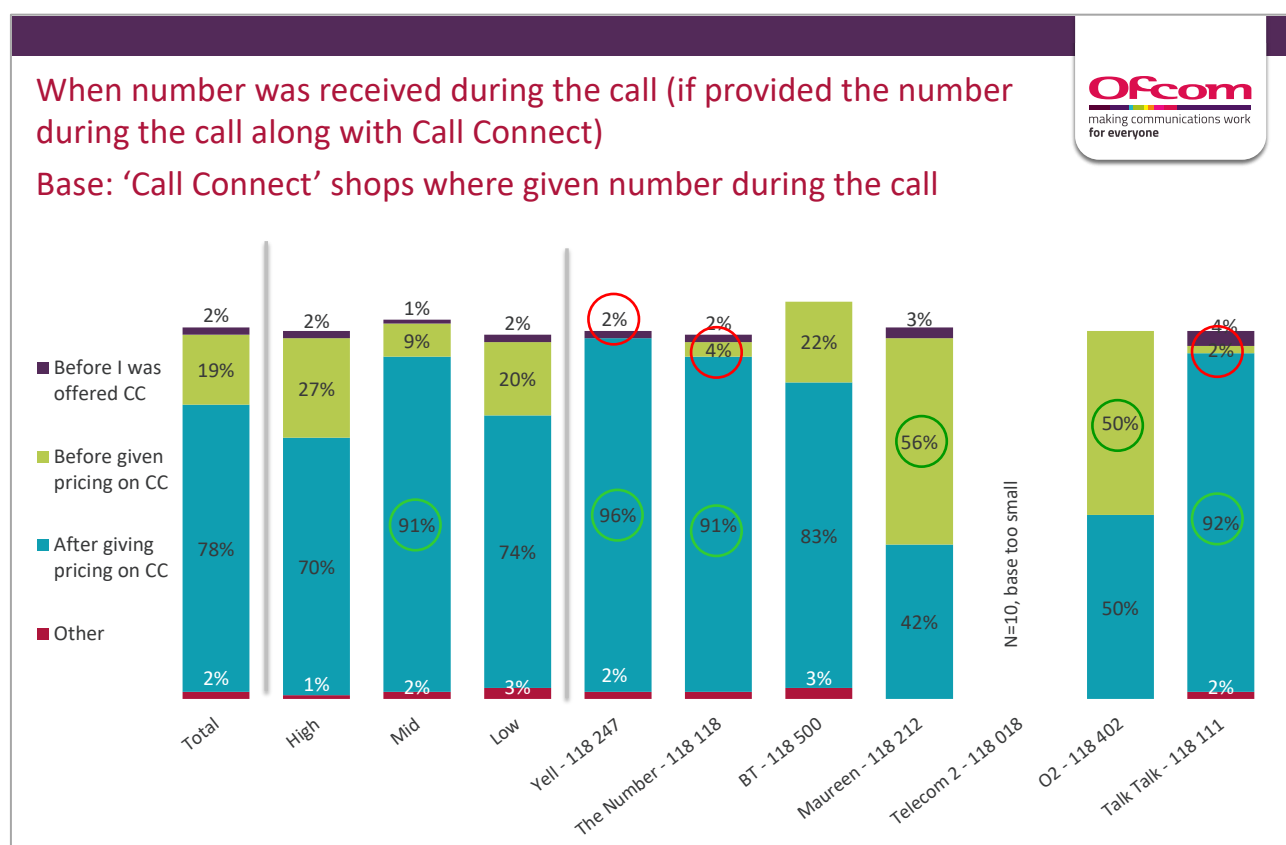
Q11a. When was the number given?
Base: All shops where call connect accepted and given the number during the call (automated or by operator). Total: 261, High: 82*, Mid: 85*, Low: 94*, Yell (118 247): 49**, The Number (118 118): 46**, BT (118 500): 36**, Maureen (118 212): 36**, Telecom 2 (118 018): 10 NOT SHOWN, O2 (118 402): 36**, TalkTalk (118 111): 48** **VERY LOW BASE, CAUTION TREAT AS INDICATIVE ONLY
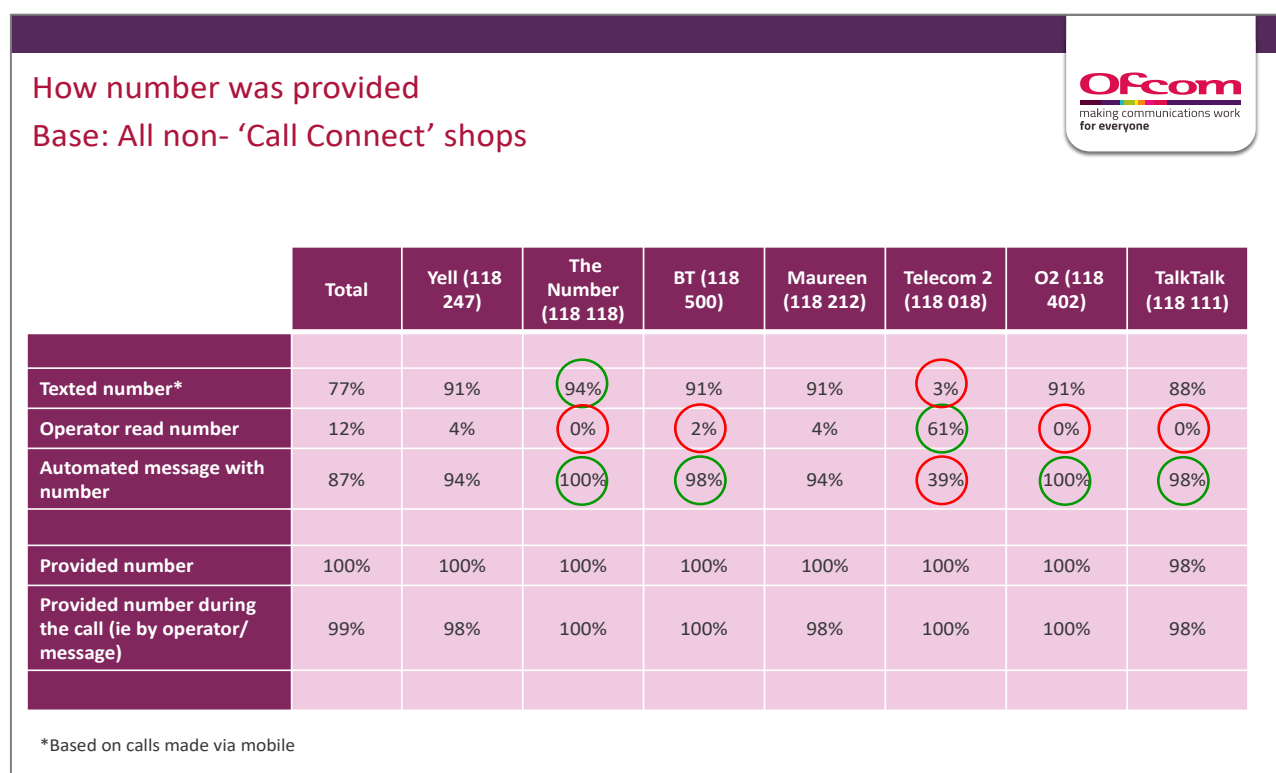
6.3   Non 'Call Connect' experience

In half of the calls made, shoppers were instructed to **not** accept 'Call Connect', if offered. In addition, not all shoppers were offered 'Call Connect'. Results in this section apply to those who **did not use** the 'Call Connect' service, i.e. both these groups. Base sizes (number of calls) for individual DQs are close to 50 and results should be treated as indicative.

6.3.1   Provision of number in non- 'Call Connect' calls

As Figure 12 illustrates, numbers were provided during the call in almost all non-'Call Connect' shops (99%). All the DQs (other than Telecom 2) provided the number via automated message the vast majority of the time, ranging from 100% for The Number and O2, to 94% for Maureen and Yell. And for all DQs, other than Telecom 2, calls from mobiles were texted the number in 9 out of 10 cases (range: 88% TalkTalk - 94% The Number).

Figure 12

How number was provided
Base: All non- 'Call Connect' shops

	Total	Yell (118 247)	The Number (118 118)	BT (118 500)	Maureen (118 212)	Telecom 2 (118 018)	O2 (118 402)	TalkTalk (118 111)
Texted number*	77%	91%	94%	91%	91%	3%	91%	88%
Operator read number	12%	4%	0%	2%	4%	61%	0%	0%
Automated message with number	87%	94%	100%	98%	94%	39%	100%	98%
Provided number	100%	100%	100%	100%	100%	100%	100%	98%
Provided number during the call (ie by operator/ message)	99%	98%	100%	100%	98%	100%	100%	98%

*Based on calls made via mobile

Q12a: How were you provided the number that you asked for?
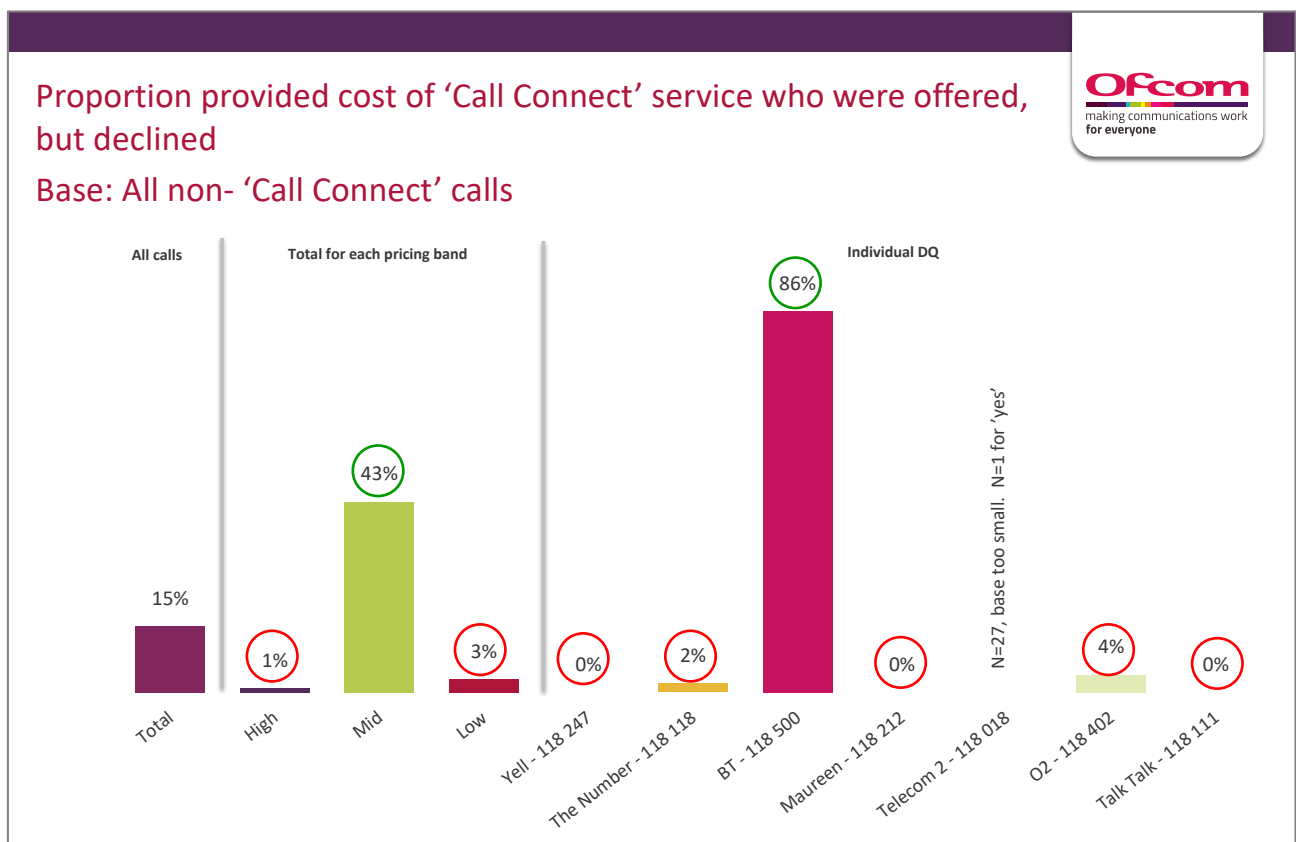
Base: All shops where call connect was declined or not offered. Total: 365/231, High: 101/65*, Mid: 101/65*, Low: 163/101, Yell (118 247): 51*/33**, The Number (118 118): 50*/32**, BT (118 500): 50*/32**, Maureen (118 212): 51*/33**, Telecom 2 (118 018): 64/36**, O2 (118 402): 49*/32**, TalkTalk (118 111): 50*/33**   **VERY LOW BASE, CAUTION TREAT AS INDICATIVE ONLY/ *LOW BASE < 100

As shown in Figure 12, non-'Call Connect' shops to Telecom 2 were unlikely to result in a number being texted (3%). In 61% of shops to this DQ, numbers were read out by an operator, and in 39% they were given the number via automated message.

6.3.2 'Call Connect' cost provision

BT 118 500 was the **only** DQ provider where the cost of 'Call Connect' was outlined in the majority of cases (86%) before the shopper declined use of the service. Incidence for other DQs was negligible, as shown in Figure 13.

Figure 13

Proportion provided cost of 'Call Connect' service who were offered, but declined
Base: All non- 'Call Connect' calls

Q13: At the point you were offered call connect, had you been informed about the cost of using the call?
Base: All shops where call connect was offered but declined. Total: 309, High: 93*, Mid: 97*, Low: 119, Yell (118 247): 48**, The Number (118 118): 47**, BT (118 500): 49**, Maureen (118 212): 46**, Telecom 2 (118 018): 27 NOT SHOWN, O2 (118 402): 47**, TalkTalk (118 111): 45** **VERY LOW BASE, CAUTION TREAT AS INDICATIVE ONLY *LOW BASE <100

6.4   Other pricing information

Shoppers were asked to record any information that they received about the **price of the DQ service** itself (separately from 'Call Connect'), from initially dialling the service, to when the call was completed. The only DQ price information noted by shoppers was given by the telephone service provider used by the caller. This was heard before the call was connected to the DQ provider, i.e. before the number started 'ringing out'.

In this mystery shopping exercise, all calls were made either from a BT landline or Vodafone mobiles. There was no message noted for those calling from BT landlines. However, all callers from Vodafone mobile network noted they were told:

- That the number dialled will be charged at a premium rate

- That there is an access charge cost from your telephone provider

6.5   Timings of call

Callers were asked to time **two** elements during their shop. These were:

a. The number of seconds that elapsed **before** their call was answered

b. The number of seconds **from** when their call was answered **to** when the call ended

Both these timings were done manually, by the shoppers themselves based on instructions provided. They will be indicative of relative timings, but it is acknowledged they will not be as accurate as timings recorded by the DQs themselves based on actual call data. It is also the case that the types of numbers requested may not be typical in terms of actual enquiries received (in terms of complexity), and that this will mean that the times recorded may not translate to DQs internally recorded call times.

6.5.1   Length of time (seconds) for the call to be answered

Shoppers were asked to time how long it took for their call to be answered. The following instructions were given to shoppers on how to do this:

How long did it take for your call to be answered from when the phone started ringing (see NOTE)? (This could be either by a person or an automated system).

NOTES: please be aware that some mobile phone networks and landline providers will have an automated message about connecting you to a premium rate number (see notes for more details). If this occurs, start the timing from when the phone starts ringing at the end of this message.

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The median[4] average number of seconds for a call to be answered was 1, as shown in Figure 14. This was consistent across 6 of the 7 DQs, with the exception being Telecom 2, where the median average was 14 seconds.

Almost all calls to Yell, The Number, O2 and TalkTalk were answered within 20 seconds (99%, 99%, 97%, 99% respectively) and the proportion of calls to BT 118 500 and Maureen answered within this time period was also very high (93%, 95%). Over two in five (43%) calls to Telecom 2 were answered after 20 seconds or longer.

Figure 14

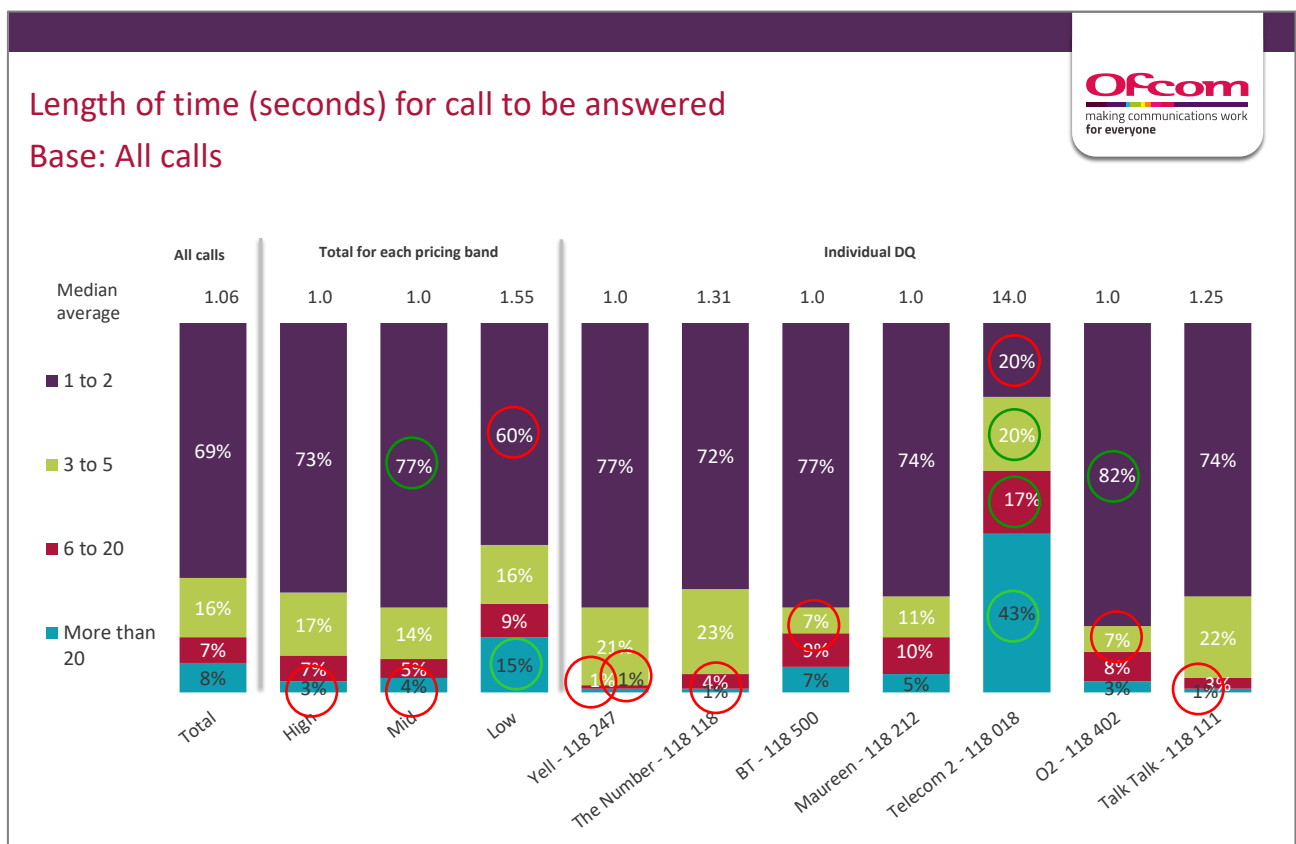Q1: How long did it take for your call to be answered from when the phone started ringing? (This could be either by a person or an automated system).

Base: All where got through to DQ provider. All: 690, High: 200, Mid: 200, Low: 290, Yell (118 247): 100, The Number (118 118): 100, BT (118 500): 100, Maureen (118 212): 100, Telecom 2 (118 018): 90*, O2 (118 402): 100, TalkTalk (118 111): 100   *LOW BASE SIZE: <100

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[4] *The median is the middle point of a number set, in which half the numbers are above the median and half are below, it shows where the centre of gravity is in the data set, and reduces the impact of unusually high or low scores which are taken into account in a mean average calculation*

6.5.2 Length of call

The second element of timing that shoppers measured was the **length of the call**. The following instructions were provided:
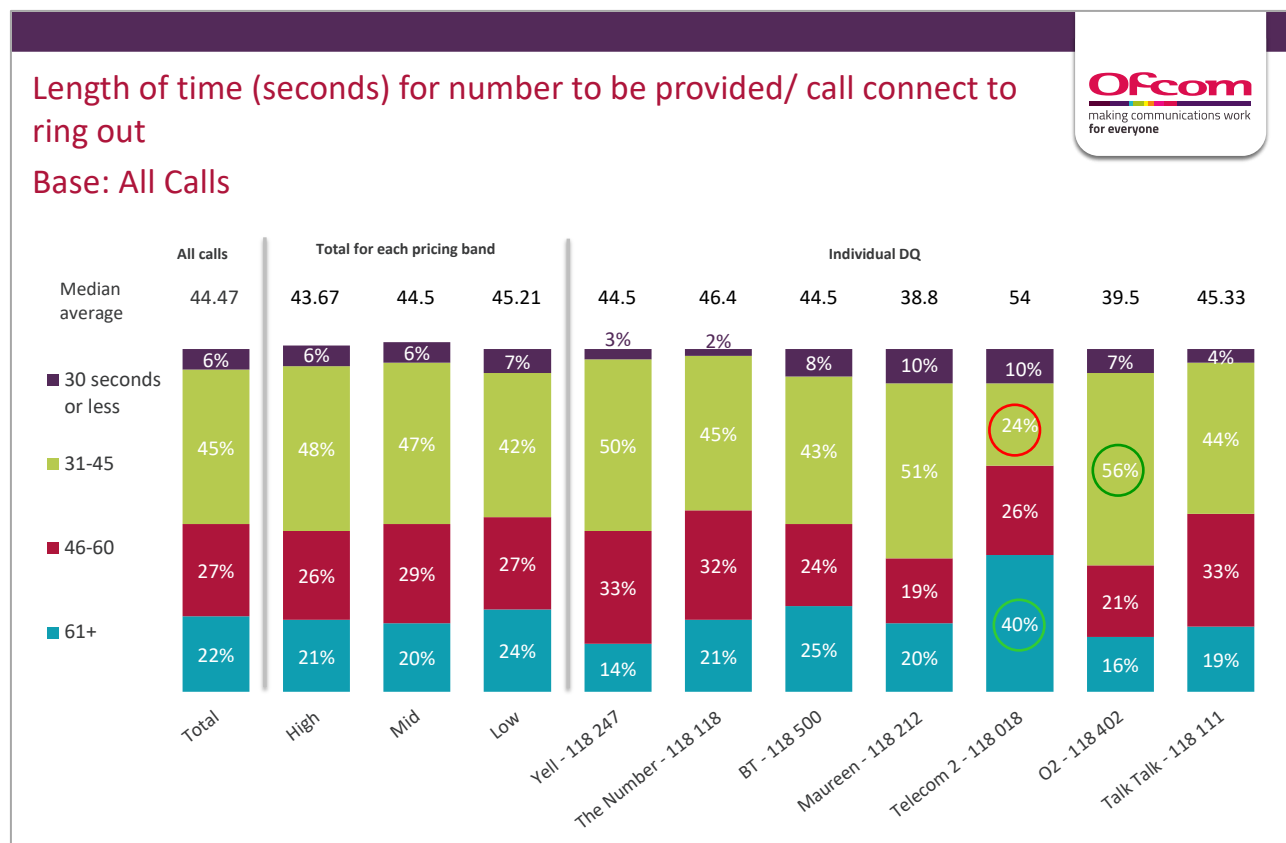
> *How long did it take from when your call was answered until it ended? The call ends after you are given the number requested unless you were using the call connect service. If you were using the call connect service, this would be when you hear the first ring of your connected call. Please record in the boxes below.*
>
> *NOTES: the call has 'ended' either when you hear the first ring of your connected call or, if you are not using the call connect service, the call ends after you receive the number for the first time (either read out by the operator or by an automated message)*

As shown in Figure 15, the median[1] average call length was 44 seconds, with 78% of calls lasting less than a minute and 22% in excess of a minute. *NB: It should be noted that shoppers using the 'Call Connect' service ended the timing on the first ring.* The average was broadly consistent by DQ provider ranging from just less than 40 seconds for Maureen (38.8) and O2 (39.5) to 46.4 seconds for The Number and 54 seconds for Telecom 2.

Two in five (40%) calls to Telecom 2 lasted more than a minute, around twice the level of most other DQs. There was no difference in the time taken between the different DQ pricing bands.

Figure 15

Length of time (seconds) for number to be provided/ call connect to ring out
Base: All Calls

Q2: How long did it take from when your call was answered until it ended?

Base: All where got through to DQ provider. All: 690, High: 200, Mid: 200, Low: 290, Yell (118 247): 100, The Number (118 118): 100, BT (118 500): 100, Maureen (118 212): 100, Telecom 2 (118 018): 90*, O2 (118 402): 100, TalkTalk (118 111): 100   *LOW BASE SIZE: <100*

Figure 16 illustrates the recorded length of call for 'Call Connect' shops. The median[1] was slightly higher than non-'Call Connect' (shown in Figure 17) at 46.5 vs. 41.25 seconds. As previously stated, timings of 'Call Connect' calls ended on the first ring of the connected call.

'Call Connect' shops to Maureen were significantly **less likely** to take more than a minute than the total (13% vs. 26%), with a similar, but not statistically significant, result for O2 (16%). Calls to BT 118 500 were **more** likely to last 30 seconds or less (14%) and this difference was significantly different to the total.

Almost no calls to Yell, The Number and TalkTalk (0%, 0%, 2%) lasted for **less** than 30 seconds, in contrast to 8% for O2, 9% for Maureen and 14% for BT 118 500. There was no difference by DQ pricing band.

Figure 16
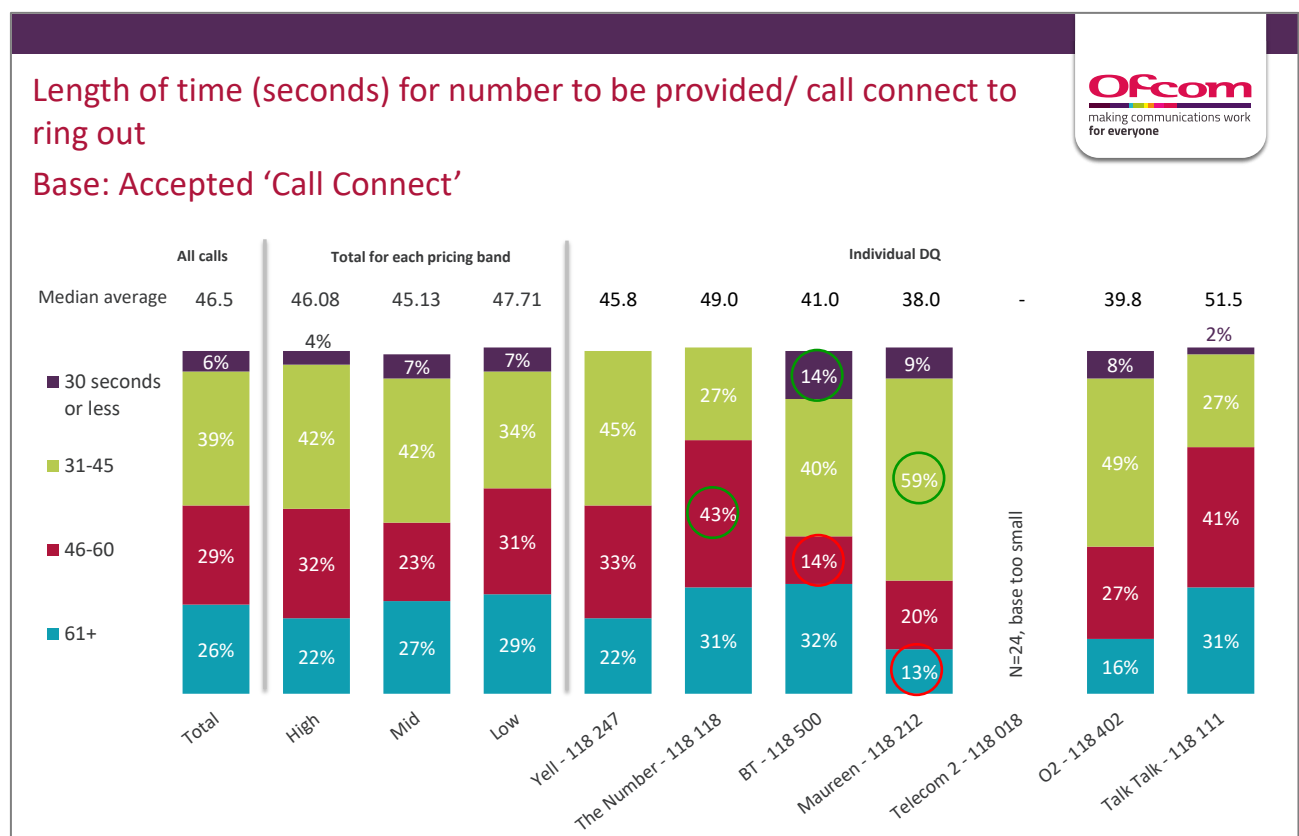
*Q2: How long did it take from when your call was answered until it ended? The call ends **after you are given the number requested** unless you were using the call connect service. If you were using the call connect service, this would be **when you hear the first ring of your connected call**.*
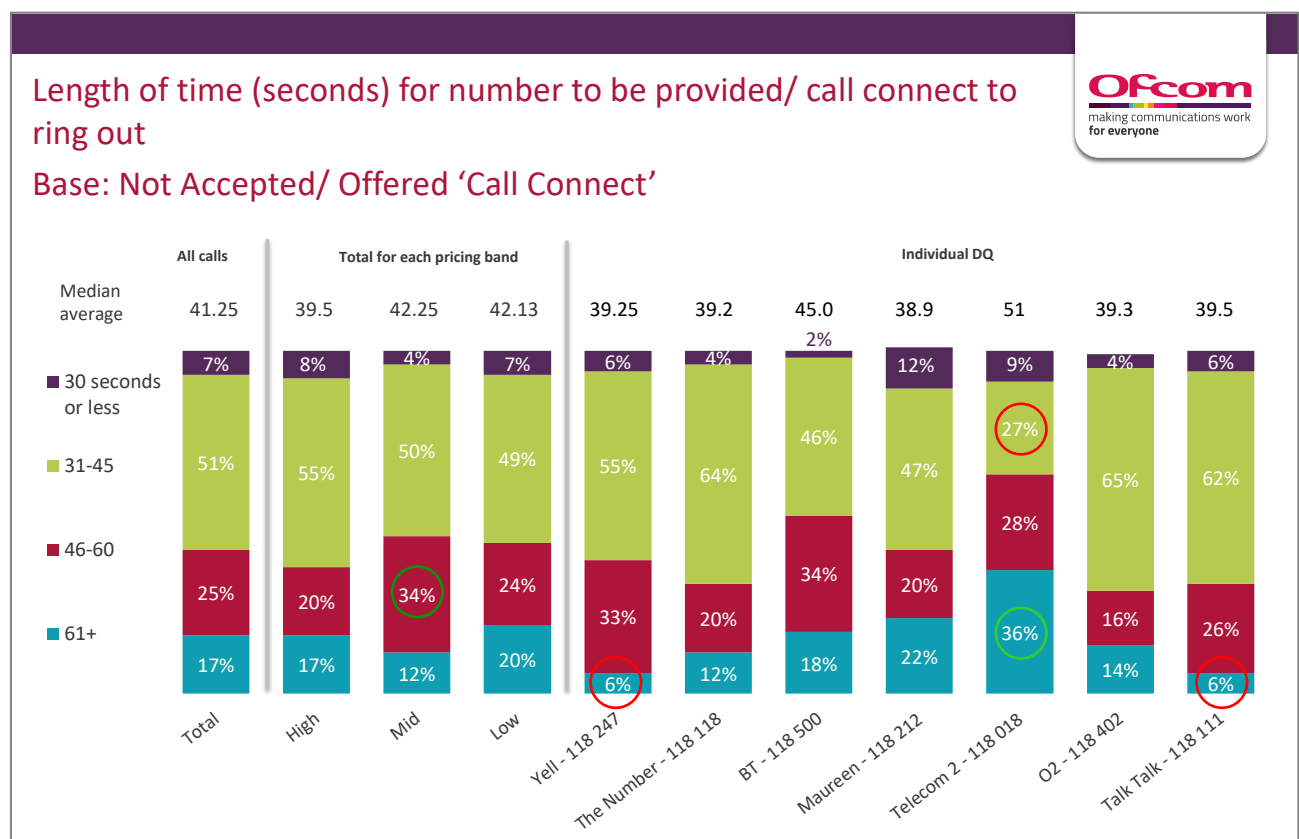
Base: All where got through to DQ provider and accepted call connect. All: 316, High: 95*, Mid: 99*, Low: 122, Yell (118 247): 49*, The Number (118 118): 49*, BT (118 500): 50*, Maureen (118 212): 46*, Telecom 2 (118 018): 24** (NOT SHOWN), O2 (118 402): 49*, TalkTalk (118 111): 49* *LOW BASE SIZE: <100

Figure 17 illustrates that non-'Call Connect' calls lasted 41.25 seconds on average (median[1]) by DQ, from around 39 seconds for Yell, The Number, Maureen, O2 and TalkTalk, to 45 seconds for BT and 51 seconds for Telecom 2.

Calls to Yell and TalkTalk were the **least** likely to last over one minute (6%), significantly below the total (17%). A third of calls to Telecom 2 lasted more than a minute (36%).

There was no pattern observable in the length of call by pricing band.

Figure 17

Length of time (seconds) for number to be provided/ call connect to ring out
Base: Not Accepted/ Offered 'Call Connect'

*Q2: How long did it take from when your call was answered until it ended? The call ends **after you are given the number requested** unless you were using the call connect service. If you were using the call connect service, this would be **when you hear the first ring of your connected call**.*

Base: All where got through to DQ provider and either declined/ weren't offered call connect. All: 365, High: 101, Mid: 101, Low: 163, Yell (118 247): 51, The Number (118 118): 50, BT (118 500): 50, Maureen (118 212): 51, Telecom 2 (118 018): 64*, O2 (118 402): 49*, TalkTalk (118 111): 50* *LOW BASE SIZE: <100*

6.6 Rating of call

This section examines several 'subjective' measures; described as such because the shopper **themselves** is making a judgement. However, they give an indication of the experience of the shopper and the overall feel of the call. These measures are:

a. Whether shoppers felt that there was an opportunity for them to subsequently decline using the 'Call Connect' service, after initial acceptance, and after being told the price for using the service

b. Whether shoppers felt that they had sufficient time in which to write down the number of the business requested

c. Level of clarity of cost information provided for 'Call Connect', and reasons why if felt to be 'unclear'

d. Efficiency of the call overall, and reasons why if felt to be 'not efficient'

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6.6.1 Opportunity to decline using 'Call Connect'

As shown in Figure 18, three in five (59%) shoppers using the 'Call Connect' service felt that they had an opportunity to decline using the service after they had been provided price information. Compared to the overall total, this proportion was significantly higher for calls to BT 118 500 (92%), O2 (89%) and Maureen (73%). These DQs were also more likely to provide pricing information by an operator, and therefore shoppers may have felt there was more potential for dialogue.

Calls to The Number and TalkTalk were significantly less likely (than the total) to record that they felt they had an opportunity to decline (30%, 36% respectively).

Figure 18
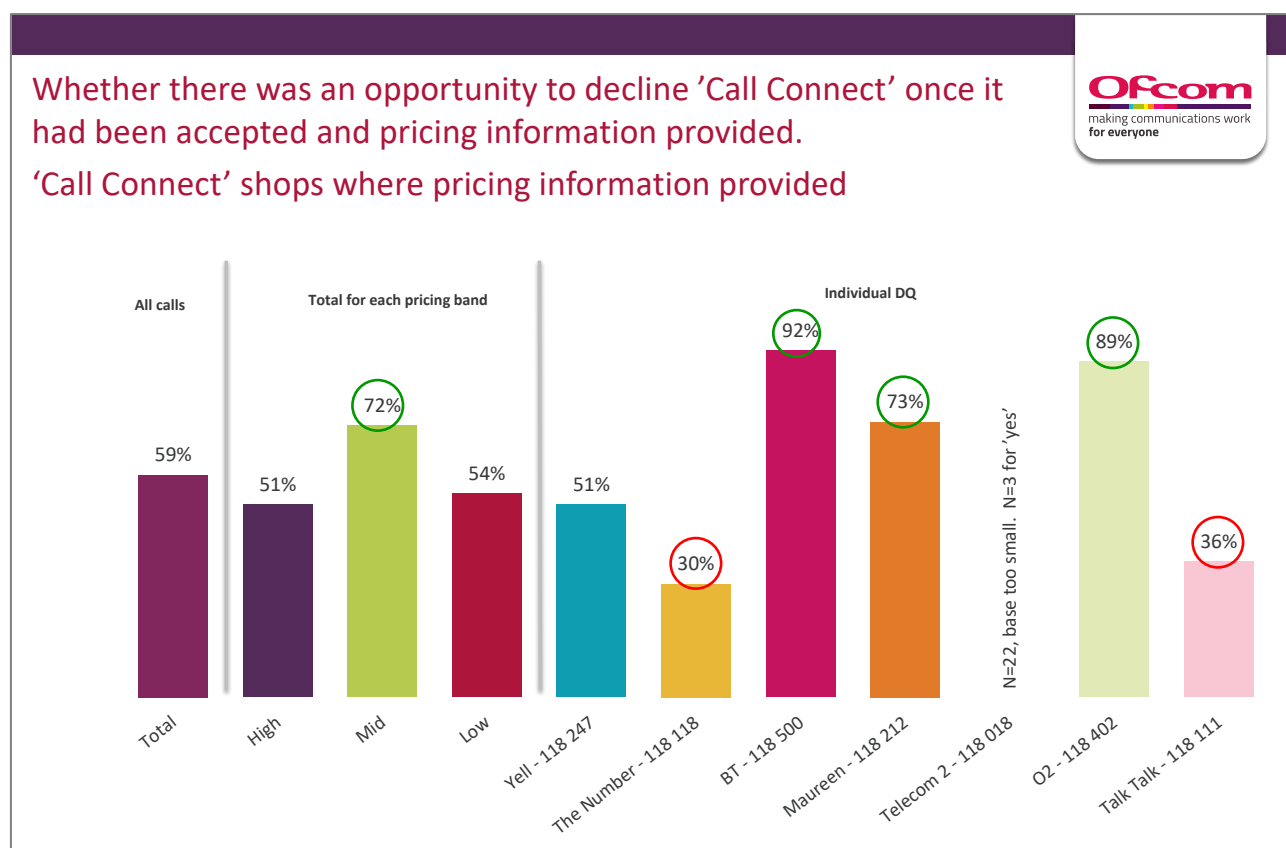
*Q8b: **Did you have an opportunity to decline call connect once you had been informed of pricing information? This could mean being explicitly asked by the operator if you wanted to continue to call connection. It could also mean if you considered you had enough time to say you've changed your mind before your call was connected.***

Base: All shops where call connect accepted and pricing information provided. Total: 303, High: 92, Mid: 97, Low: 114, Yell (118 247): 47**, The Number (118 118): 47**, BT (118 500): 50**, Maureen (118 212): 45**, Telecom 2 (118 018): 22 NOT SHOWN, O2 (118 402): 47**, TalkTalk (118 111): 45** **VERY LOW BASE, CAUTION TREAT AS INDICATIVE ONLY*

6.6.2   Sufficient time to note down a number

As illustrated in Figure 19, a large majority (91%) of 'Call Connect' shoppers indicated that they felt they had sufficient time to write down the number, if it was provided during the call. This ranged from 100% for calls to TalkTalk (and near that – 98% for Yell and The Number), to 75% for Maureen.

There was no difference by pricing band.

Figure 19
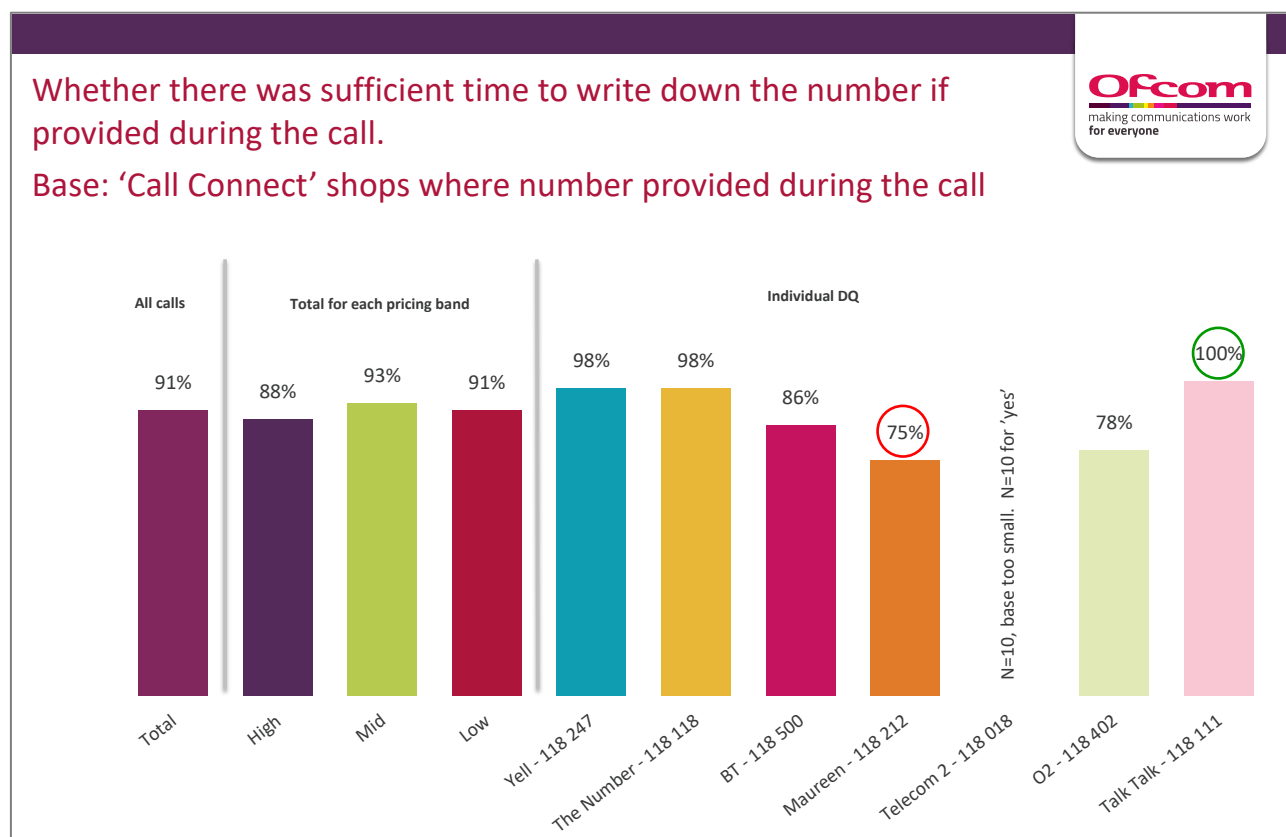
Q10: Do you feel you were given sufficient time to write down the number?

Base: All shops where call connect accepted number provided during the call. Total:261, High: 82, Mid: 85*, Low: 94*, Yell (118 247): 49**, The Number (118 118): 46**, BT (118 500): 36**, Maureen (118 212): 36**, Telecom 2 (118 018): 10 NOT SHOWN, O2 (118 402): 36**, TalkTalk (118 111): 48**   **VERY LOW BASE, CAUTION TREAT AS INDICATIVE ONLY/ * LOW BASE <100*

There was a significant difference in perception of whether sufficient time was given to note down the number, depending on how the number was provided. As shown in Figure 20, those who were provided the number via an **automated message** were almost always (98%) likely to record that they had sufficient time to note it down, compared to 79% of those given the number **by an operator.**

Figure 20

Whether there was sufficient time to write down the number if provided during the call.

Base: 'Call Connect' shops where number provided during the call

% given sufficient time to note down number

91% — All given number during call

94% — Also texted number

79% — Read number by operator

98% — Given number via automated message

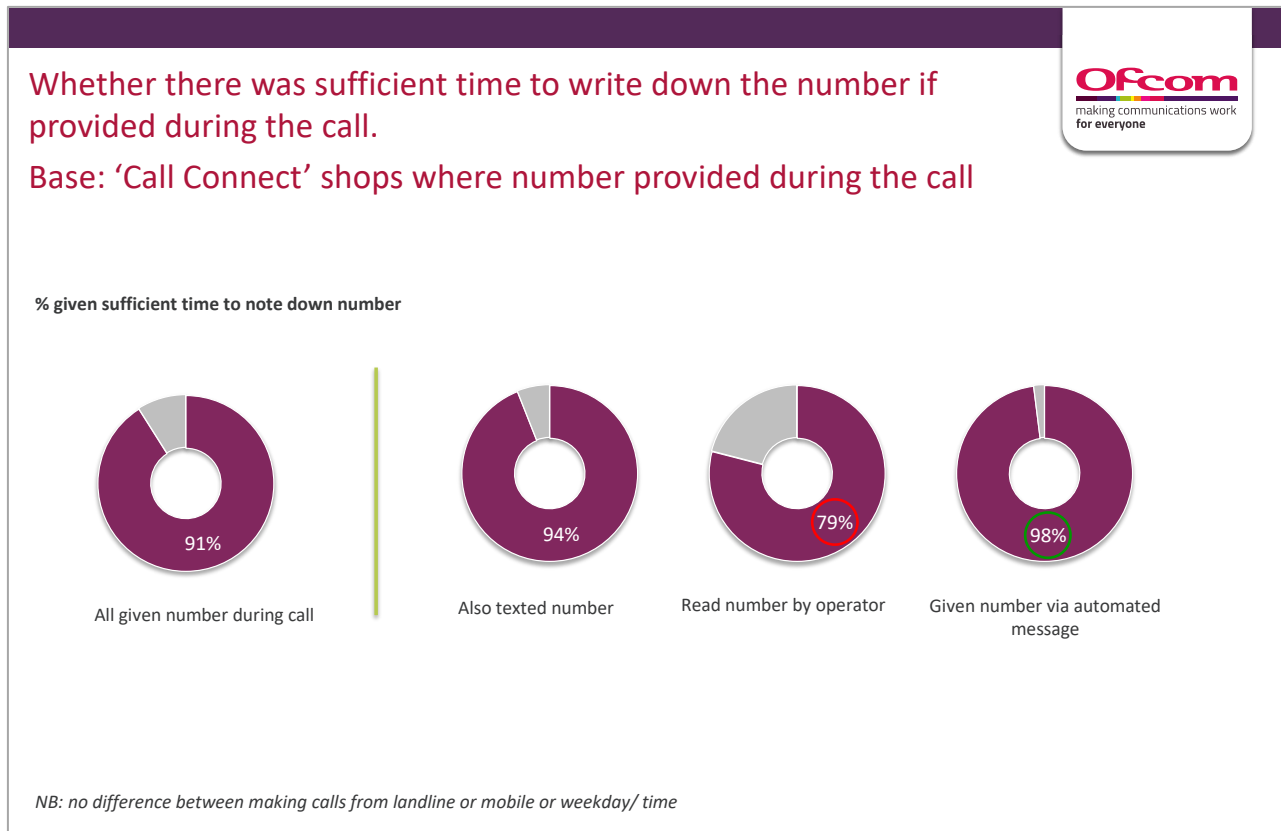NB: no difference between making calls from landline or mobile or weekday/ time

*Q10: **Do you feel you were given sufficient time to write down the number?***

Base: All shops where call connect accepted number provided during the call and also given the number during the call. Texted the number: 63, Read out number: 105, Given via automated message: 159

6.6.3 Clarity of cost information relating to 'Call Connect'

Where it was provided, 95% of shoppers indicated that cost information about 'Call Connect' was 'clear', as shown in Figure 21. For two in five (40%) it was 'extremely clear' and for 55% 'quite clear'.

At an overall level there was no difference in the perceived level of clarity between the individual DQs. The Number was significantly less likely than the total to be rated as 'very clear' (26%) and at around half the level of BT 118 500, Maureen, O2 and TalkTalk (48%, 49%, 47%, 49% respectively).

Figure 21
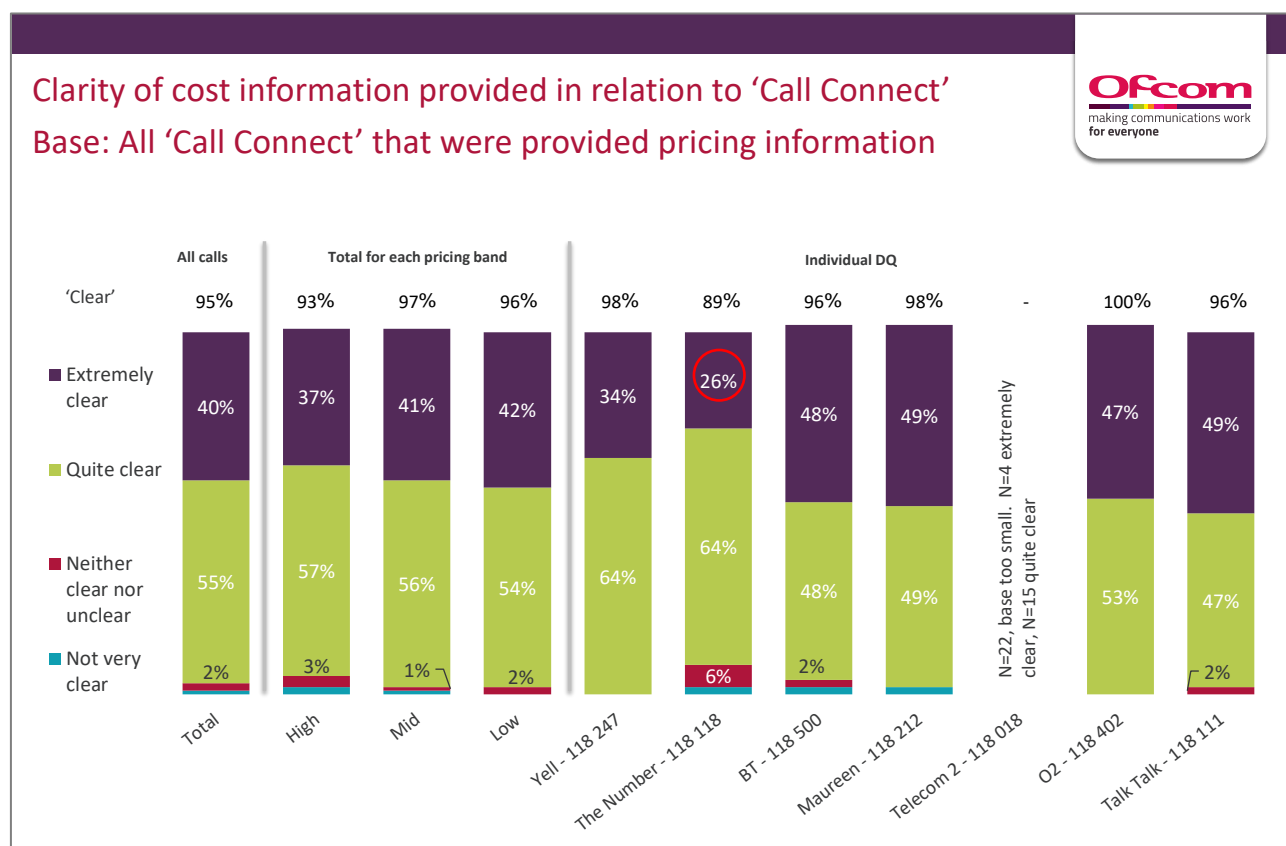
*Q19a: Using the scale below, please indicate how **clear or unclear** you found the information you were given related to the price of **call connect**, where 1 is not at all clear and 5 is extremely clear? Base: All shops where call connect accepted and pricing information provided. Total: 303, High: 92, Mid: 97, Low: 114, Yell (118 247): 47**, The Number (118 118): 47**, BT (118 500): 50**, Maureen (118 212): 45**, Telecom 2 (118 018): 22 NOT SHOWN, O2 (118 402): 47**, TalkTalk (118 111): 45** **VERY LOW BASE, CAUTION TREAT AS INDICATIVE ONLY*

As illustrated in Figure 24, at the level of being 'extremely clear', there was a significant difference in the perception of clarity between those who had been given pricing information **before** they accepted 'Call Connect' (59%) to those provided it **after** they accepted (35%).

Figure 22

Clarity of 'Call Connect' cost information
Base: All 'Call Connect' that were provided pricing information

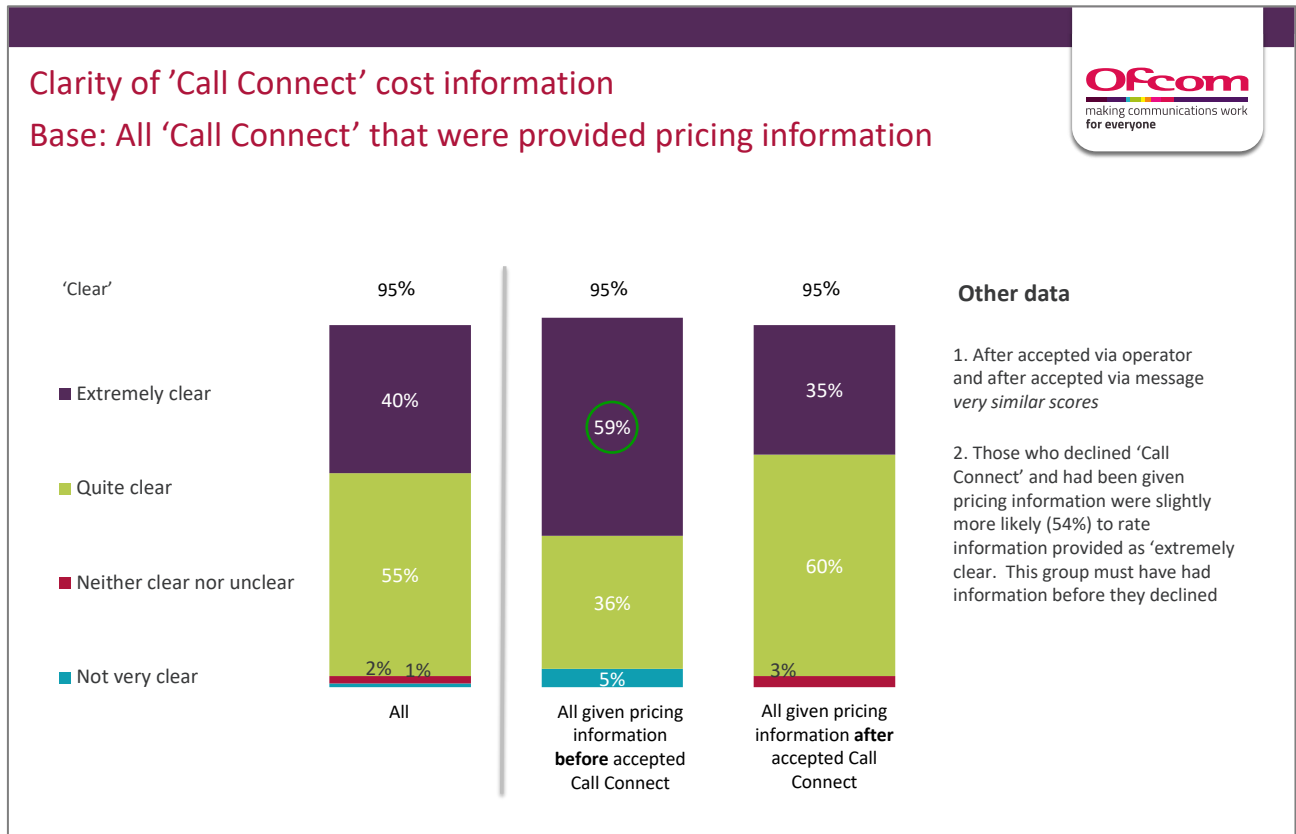*Q19a: Using the scale below, please indicate how **clear or unclear** you found the information you were given related to the price of **call connect**, where 1 is not at all clear and 5 is extremely clear? Base: All provided CC pricing information on a CC call. All: 303, Provided before accepted: 66*, Provided after accepted: 237 *LOW BASE <100*

Where shoppers found information provision 'not clear' this was concerned with the delivery being too fast, quietly spoken or difficult to understand due to an accent.

6.6.4 Speed and general efficiency of call

Overall, just over eight in ten (82%) of calls were felt to be 'efficient', with 22% recorded as 'extremely efficient' and 60% as 'quite efficient'. This included both those using 'Call Connect' and those not using that service. As shown in Figure 23, this ranged by individual DQ from 61% for Telecom 2 to an efficiency score of 88% for The Number and BT 118 500.

BT 118 500 was significantly **more likely** (than the total) to be rated as 'extremely efficient' (39%), and both The Number and Telecom 2, were significantly **less likely** to have this rating (11%, 6% respectively).

There was no difference in perceived efficiency by pricing band at an overall level, although 'midpriced' DQs had the highest proportion of 'extremely efficient' scores (33% vs. 18% for high/ low priced DQs).

Figure 23
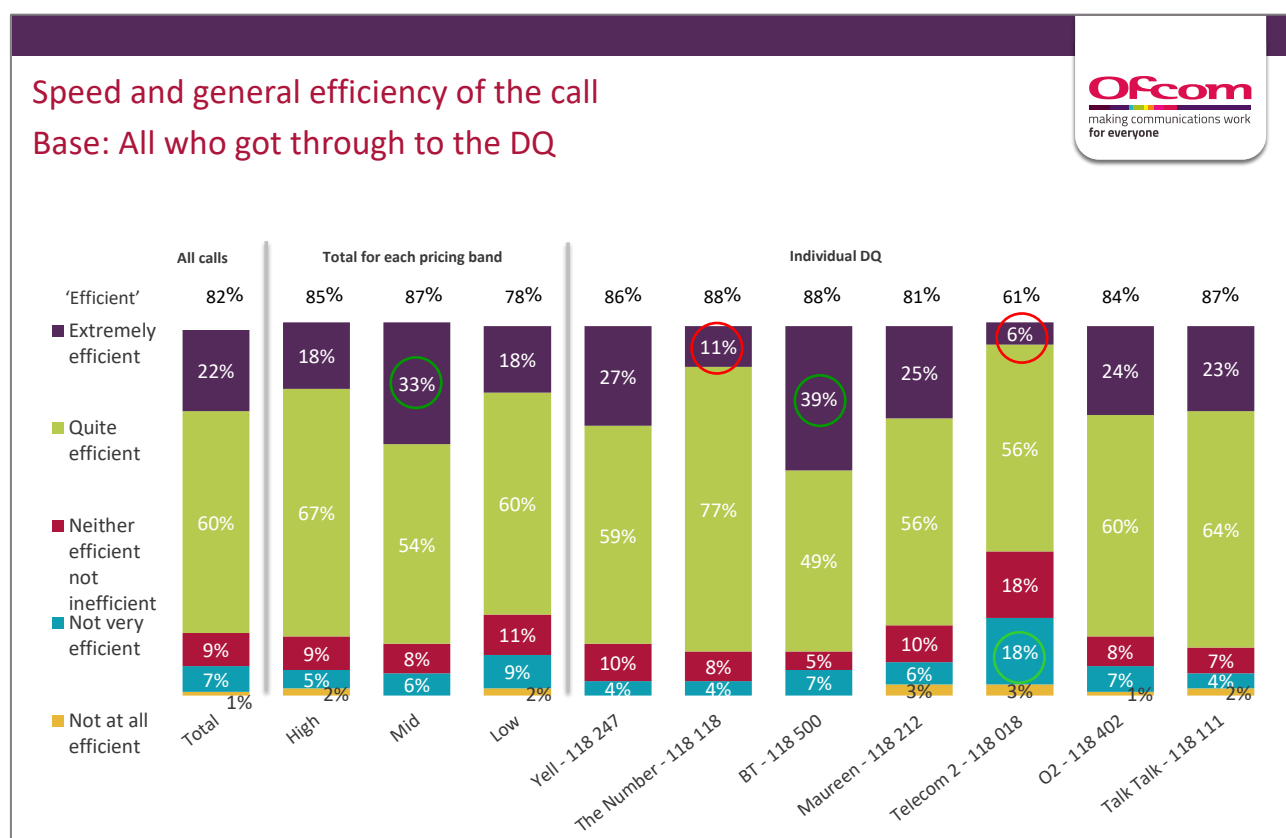
*Q20a: Thinking about the **speed and general efficiency** of the call, using the scale below, how efficient or inefficient was it, where 1 is not at all efficient and 5 is extremely efficient? Base: All where got through to DQ provider. All: 690, High: 200, Mid: 200, Low: 300, Yell (118 247): 100, The Number (118 118): 100, BT (118 500): 100, Maureen (118 212): 100, Telecom 2 (118 018): 90*, O2 (118 402): 100, TalkTalk (118 111): 100 *LOW BASE SIZE: <100*

Quotes below are from shoppers explaining the reason that they rated a call as 'not very' or 'not at all' efficient. Reasons given tended to be issues in delays, problems finding the number requested, or technical issues.

"The operator took 53 seconds before my call was answered. There also appeared to be a few seconds of delay before connecting me to my call. Finally, I wasn't provided with the number of the place requested, despite me asking"

"The operator had difficulty finding the company. There were some unnecessary pauses"

Telecom 2

"There were a few unnecessary delays with the call. The operator asking repeatedly for the name and then giving me the number of a hardware store. Once the detail was found I was told to hold the line. This lasted about 8 seconds then I was forwarded to the automated message"

BT 118 500

"The call took longer than average as the operator struggled to find the number he had to look it up in another database eventually"

Maureen

"The operator said she is connecting my call however it just went back to the DQ service, I told her what had happened and then she connected me"

O2

"There were several numbers so the operator gave me a few options/ locations to choose from"

TalkTalk

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The Number

Yell

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Appendix: Field materials

A. Questionnaire

Directory Enquires Mystery Shopping Questionnaire
JN: 23272

ALLOCATION GRID (TO BE COMPLETED BY SUPERVISOR TEAM):

DQ SUPPLIER & NUMBER	
TIME OF DAY	
DAY OF WEEK	
MEANS OF CALL	
BUSINESS REQUESTED	
ADDRESS/ LOCATION OF BUSINESS	
CALL CONNECT	

KEY NOTES PAGE/ THINGS TO LISTEN OUT FOR DURING CALL):

TIME:
FROM DIALING TO CALL BEING ANSWERED
FROM BEING ANSWERED TO BEING GIVEN REQUESTED NUMBER **OR**
FROM BEING ANSWERED TO BEING CONNECTED TO REQUESTED NUMBER (CALL RINGING)

INFORMATION:
WERE YOU OFFERED CALL CONNECT?

- When

- Could you decline and receive the number instead?

- Were you told the cost?

- When were you told the cost?

WERE YOU PROVIDED WITH THE NUMBER OR OFFERED THE NUMBER?

- When?
- How?

DID THEY GIVE YOU ANY OTHER CHARGING INFORMATION?

ATTEMPT NOTES

Call 1.

COMPLETED	1
NOT COMPLETED	2
Reason why not completed…..	

Call 2.

COMPLETED	1
NOT COMPLETED	2
Reason why not completed…..	

Call 3.

COMPLETED	1
NOT COMPLETED	2
Reason why not completed…..	

Please note, please allow **1 minute** of ringing (after any pre-call automated announcement) before ending your attempt.

If after Call 3 shop could not be completed please answer S1 to S7 about Call 3 and submit questionnaire.

NOTES: please be aware that some mobile phone networks and fixed line providers will have an automated message about connecting you to a premium rate number before the phone starts ringing (see notes for more details). If this occurs, start the timing from the end of this message.

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QUESTIONNAIRE TO **BE COMPLETED AFTER CALL:**

TIMING

Q1.   How long did it take for your call to be answered from when <u>the phone started ringing</u> (see NOTE)? (This could be either by a person or an automated system).

Please record in the boxes below. If the call was answered in 23 seconds you would record this as 23 in the seconds box. If it was answered in 63 seconds you would record was 1 min 3 seconds

NOTES: please be aware that some mobile phone networks and landline providers will have an automated message about connecting you to a premium rate number *(see notes for more details)*. If this occurs, start the timing from when the phone starts ringing at the **end** of this message.

MIN	MIN	SEC	SEC

Q2.   How long did it take from when your call was answered until it ended? The call ends **after you are given the number requested** unless you were using the call connect service. If you were using the call connect service, this would be **when you hear the first ring of your connected call**. Please record in the boxes below.

IF YOU ARE NOT USING CALL CONNECT: if the number was provided <u>*for the first time*</u> 23 seconds after the call was answered , you would record this as 23 in the seconds box. If the number was provided 63 seconds after the call was answered, you would record this as 1 min 3 seconds

IF YOU ARE USING CALL CONNECT: if you hear the first ring of the connected call 23 seconds after the call was answered, you would record this as 23 in the seconds box. If you hear the first ring of the connected call 63 seconds after the call was answered, you would record this as 1 min 3 seconds.

NOTES: the call has 'ended' either when you hear the first ring of your connected call or, if you are not using the call connect service, the call ends after you receive the number <u>*for the first time*</u> (either read out by the operator or by an automated message)

MIN	MIN	SEC	SEC

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Q3.   Were you asked for the number you wanted by an operator or an automated service?

Operator	1
Automated	2

Q4.   **ALL ASKED FOR NUMBER BY AN AUTOMATED SERVICE (Q3=2)**
       Did you speak to an operator at any point during the call?

Yes	1
No	2

Q5. Were you provided with the number and/ or call connect in response to your request?

Yes	1
No, please specify reason in box below.	2

If Yes, go to Q6, if No go to Q14

Q6. Were you offered the call connect service?

Yes – I accepted	1
Yes – I declined	2
No	3

Code 1 – answers Q7-11 (where applicable) then on Q14
Codes 2&3 – go straight to Q12 onwards

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Q7. Were you given information about the call charges for call connection?

Yes, before accepted call connection	1
Yes, after accepted call connection	2
No	3

Q8a. ALL GIVEN CONNECTION CHARGE INFORMATION (Q7= 1 or 2).
How was information about the call charges for call connection given? Please code all that apply.

Operator	1
Recorded message	2
Other, please specify	3

Q8b.   ALL GIVEN CONNECTION CHARGE INFORMATION (Q7= 1 or 2).
Did you have an opportunity to decline call connect once you had been informed of pricing information? This could mean being explicitly asked by the operator if you wanted to continue to call connection. It could also mean if you considered you had enough time to say you've changed your mind before your call was connected.

Yes	1
No	2

Q9. In addition to call connection, were you also given the number a different way? Please code as many as apply.

Yes, I was texted the number	1
Yes, the operator read out the number	2
Yes, the number was given via an automated message	3
Yes, other please specify	4
No	5
Don't know	6

Q10. If you answered 2) or 3) in Q9. Do you feel you were given sufficient time to write down the number?

Yes	1
No	2

Q11A. If you answered 2) or 3) in Q9. When was the number given?
Please code as many as apply

Before I was offered call connect	1
Before pricing information on call connect	2
After pricing information on call connect	3
Other	

Q11B. All who accepted call connect (Q6-1)
Was the call connection successful, ie did the call ring out?

Yes	1
No	2

Q11C. All who accepted call connect (Q6-1)
What happened?

Advisor explained there was a technical fault	1
The advisor found that they were unable to do the connection but didn't mention any technical issue	2
Other (SPECIFY)	3

ALL THOSE WHO WERE NOT OFFERED CALL CONNECT OR DECLINED CALL CONNECT (Q6 CODES 2 OR 3)
Q12a   How were you provided with the number you asked for?
          Please select as many ways that apply to you

Verbally, by the operator	1
By text message	2
By automated message	3
Not provided number	4
Other (SPECIFY IN BOX BELOW)	5

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ALL THOSE WHO WERE NOT OFFERED CALL CONNECT OR DECLINED CALL CONNECT (Q6 CODES 2 OR 3) AND WERE NOT GIVEN THE NUMBER VIA ANOTHER MEANS (CODE 4 AT Q12a)

Q12b   What happened in the call that meant after declining call connect you didn't receive the number?

WRITE IN	

Q13 **ALL WHO DECLINED CALL CONNECT AT (code 2 at Q6)**
At the point you were offered call connect, had you been informed of the cost of using the call connect service?

Yes	1
No	2

GENERAL PRICING INFORMATION – <u>TO BE ANSWERED BY ALL</u>

Q14.   Was there any general message (i.e. not specific to call connect), either from an operator or from a recording about the charges that would be incurred by using the directory enquiries service? Please distinguish between any message that was provided to you before your initial call to the service started ringing and any information you were provided after this.

Notes: please be careful to distinguish this general pricing information from pricing information about the call connect service. Refer to the guide for information as to the difference here.

Yes – when I initially dialled and before the call started ringing	1 **– ASK Q15a then go to Q18**
Yes – but after the call started ringing	2 **– ASK Q15b-17**
No	2 **– GO TO Q18**

Q15a. **ALL WHO WERE PROVIDED MORE GENERAL CALL PRICING INFORMATION (CODE 1 AT Q14)**
What information was provided when you initially dialled before the call started ringing? **Please code as many as apply**

Q15b. **ALL WHO WERE PROVIDED MORE GENERAL CALL PRICING INFORMATION (CODE 2 AT Q14)**
What information was provided after the call started ringing or was answered? **Please code as many as apply**

	Q15a	Q15b
That the number dialled will be charged at a premium rate	1	
That there is a service charge cost (from the DQ provider)	2	
That there is a service charge cost (from the DQ provider) and what the level of this charge is	3	
That there is an access charge cost (from your telephone provider)	4	
That there is an access charge cost (from your telephone provider) and what the level of this charge is	5	
Other *(SPECIFY IN BOX BELOW)*	6	

Q16. **ALL WHO WERE PROVIDED MORE GENERAL CALL PRICING INFORMATION (CODE 2 AT Q14)**
How was this information provided?

Call handler	1
Recorded message	2

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Q17. **ALL WHO WERE PROVIDED MORE GENERAL CALL PRICING INFORMATION OTHER THAN A 'WHISPER' PRE-CALL AUTOMATED MESSAGE (CODE 2 AT Q14)**
When was this more general pricing information provided?

At the start of the call, after the phone rang, but before I spoke to an advisor	1
At the start of the call, after I had spoken to an advisor, but before I was asked what number I wanted	2
After I was given the number I asked for	3
At another point (SPECIFY IN BOX BELOW)	4

OVERALL EVALUATION

Q18a. **ALL GIVEN PRICING INFORMATION AT Q14 – CODES 1, 2 OTHERS GO TO Q19A**
Using the scale below, please indicate how clear or unclear you found the information you were given related to the **price of the call to Directory Enquiries**, where 1 is not at all clear and 5 is extremely clear?

Extremely clear	5
Quite clear	4
Neither clear nor unclear	3
Not very clear	2
Not at all clear	1
~~No call cost given~~	~~6~~

Q18b. **ALL CODED 1 OR 2 AT Q18a**
Why do you say that the call costs were **not very clear or not at all clear**? Please write your answer in the box below, giving specific examples where possible.

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Q19a. **ALL WHO WERE OFFERED CALL CONNECT (Q6 – codes 1 and 2)**
Using the scale below, please indicate how **clear or unclear** you found the information you were given related to the price of **call connect**, where 1 is not at all clear and 5 is extremely clear?

Extremely clear	5
Quite clear	4
Neither clear nor unclear	3
Not very clear	2
Not at all clear	1
No call connect price given	6

Q19b. **ALL CODED 1 OR 2 AT Q19a**
Why do you say that the call connect costs were **not very clear or not at all clear**? Please write your answer in the box below, giving specific examples where possible.

Q20a.   Thinking about the **speed and general efficiency** of the call, using the scale below, how efficient or inefficient was it, where 1 is not at all efficient and 5 is extremely efficient?

NOTES: For example, think about whether there were any delays in receiving information or if there was any information provided which was unnecessary.

Extremely efficient	5
Quite efficient	4
Neither efficient nor inefficient	3
Not very efficient	2
Not at all efficient	1

Q20b. **ALL CODED 1 OR 2 AT Q20a**
Why do you say that the call was **not very or not at all efficient**? Please write your answer in the box below, giving specific examples where possible.

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Q21.   **ALL WHO WERE NOT PROVIDED A NUMBER OR OFFERED CALL CONNECT**
Please explain what happened in the call which meant that you were not provided with a number or offered call connect?

PLEASE TELL YOUR SUPERVISOR WHAT HAS HAPPENED THIS CALL MAY NEED TO BE REPLACED

S1.   What DQ service did you call?
NB: THIS SHOULD MATCH YOUR ALLOCATION

YELL (118 247)	1
The number (118 118)	2
BT 118 500	3
Maureen (118 212)	4
Telecom 2 (118 018)	5
O2 (118 402)	6
TalkTalk (118 111)	7

S2.   What time was the call made? Please write in using 24 hour clock in the box below. So, if you made your call at 1.31pm and 30 seconds please write as 13 31 30.

NB: THIS SHOULD MATCH YOUR ALLOCATION

HR	HR	MIN	MIN	SEC	SEC

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S3.   What day of the week was the call made?
NB: THIS SHOULD MATCH YOUR ALLOCATION

Monday	1
Tuesday	2
Wednesday	3
Thursday	4
Friday	5
Saturday	6
Sunday	7

S4.   How did you make your call?
NB: THIS SHOULD MATCH YOUR ALLOCATION

Landline	1
Mobile phone	2

S5.   **ALL CALLING FROM A MOBILE NETWORK (S4=2)**
        What mobile phone network did you use to make your call?

Vodafone	1
O2	2
Three	3
EE	4
TalkTalk	5
GiffGaff	6
BT	7
Tesco	8
Virgin	9
iD	10
Other (SPECIFY IN BOX BELOW)	11

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S6.   **ALL CALLING FROM A LANDLINE (S4=1)**
What landline provider did you use to make your call?

BT	1
Virgin Media	2
Sky	3
TalkTalk	4
PlusNet	5
Post Office	6
Other (SPECIFY IN BOX BELOW)	7

S7.   Was your assignment to:
NB: THIS SHOULD MATCH YOUR ALLOCATION AND DOES NOT NEED TO RELFECT WHAT HAPPENED IN THE CALL , FOR EXAMPLE, IN THE EVENT YOU WERE NOT ASKED IF YOU WANTED CALL CONNECT

Accept call connect if offered	1
Decline call connect if offered	2

Mystery Shopper Declaration:

Name:

Date:

Signature:

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B. Interviewer briefing notes

DQ Mystery Shopping
Shopper briefing notes
   A. Intro:

Thank you for taking part in this exercise. We have been commissioned by Ofcom to undertake mystery shopping calls to selected Directory Enquiry (DQ) providers. Ofcom is the communications regulator and is undertaking the research to understand more about how information relating to charges is provided by DQ providers. Therefore, you can see that the research is very much in the public interest.

   B. What do I need to do?

1.   Read the briefing notes thoroughly. They will help you to carry out your assignment correctly and guide you when completing your questionnaire.

2.   Develop a reason for your call. You may not have called DQ before. It is highly unlikely anyone will ask you WHY you are using the service. However, it will add to your confidence and authenticity during the call if you have a reason in mind for why you are calling. Reasons for using DQ could be:

- Issues with your internet connection

- Smartphone broken/ not working

- Being on the road

- Not being able to locate the number on the web

- Being in an area with no 3G/ WiFi internet access

Choose a reason that suits you or develop one of your own.

3.   Follow the assignment
You will be assigned calls to make and will need to adhere to all the instructions around these. We have to make sure that calls are scheduled in a way that avoids detection from the DQ provider and also avoids placing any undue burden on their services which could cause detriment. Please follow the exact instructions on:

- Time of day

- Day of week

- Means of call (landline/ mobile)

- Number to call

- Number to ask about

- Whether you agree to use the call connect service

4.   Work out how you are going to do the timings in your call.

We need to have timings accurately recorded to the second (as calls should be very short). So please work out how you are going to time how long it takes for your call to be answered and from when it is answered to when you are connected to the number you asked for, or you are provided with the number. Smartphones often have stopwatches built in which could be a useful tool. Please be aware that calls can be answered and processed in a very short amount of time (less than a second for answering to a few seconds to process) so be prepared for that.

5.   Dial 141 before making your call

6.   Start the call by saying 'can I have the number for xxx please'. Please use this or similar wording. If the call handler initiates the call by asking what number it is that you want, it is fine just to use the business name.

Make sure that you read the business name exactly – its not enough to just say Pizza Express Manchester – for example. Give whatever information that there is available. If there are still questions asked see point 7 below.

7.   If you are asked a question – so there are a few choices in relation the number you have asked for please a rule of thumb ask for:

- Bookings – if they are a company such a hotel or a restaurant where this applies
- Customer services – if they don't sell tickets or take reservations, so for example, Tesco

8.   Make notes when on the call if this is helpful but it is quick so it might not be possible and don't rely on this. Please be aware that the questionnaire requires identification of the means of provision of numbers and the order this is done in, whether connections are available and also when information is provided. Details of any pricing information is also required. So please pay attention to all these aspects during the call. We think its best if you read through the questionnaire before you do a call, make notes during the call if you can and follow point 9 immediately.

9.   Complete the questionnaire

As soon as you have completed the call please complete the questionnaire. This will ensure that all detail is captured accurately.

10.   Flag immediately to your supervisor if you think that you might have been detected or whether there was any suspicion on your part that the person you spoke to recognised you or was aware that there might be mystery shopping taking place. Also flag if you have found you are speaking to the same person or if there is any reason to suspect that the pool of operators is very small.

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C. Things to note:

If you are told to decline call connect – think about why you might do this

It is quite a natural thing to do – you might just need the number (been asked to get it by someone urgently). Or it might be that they have told you the cost of connect and you think it is too expensive, or you just know based on past experience or being told this that it is an expensive service.

Please only decline call connect by speaking to an advisor. If the only option to decline is to put down the phone call do not take this course of action.

Be realistic but not chatty

Please behave in a relaxed manner but given timings are of interest in this research, do not string out or engage in any conversation beyond usual politeness around the point of your call.

Accept what you are offered but don't prompt

If you are offered information – please accept it. So for example, if you are offered the number to be read to you, or by a text message, for example, please say yes. But do NOT prompt for information to be given in a particular way or for any particular service.

If you are asked how you would like the number BUT not given any options, simply ask something like 'what options are there?'.

Pre-call messages from some mobile and fixed line providers

Before your call is connected (ie starts ringing) some mobile networks have a message which tells you how much the call is going to cost because DQ services are premium services. The message **from your mobile or landline provider** will be something like this:

> *"The number you've dialled is charged at a premium rate. To find out the cost of this service, please check with the organisation you're calling. You'll also need to pay an access charge, which can be found in your pricing guide. If you're happy to continue, please stay on the line and we'll connect you shortly. Otherwise you can hang up now and you won't be charged"*

Please disregard this message in the timings you are being asked to perform. It is not part of the call (as it's coming from your network, not the number you are calling) and your timing should start from when your call to the DQ service begins ringing out instead.

However you will need to record any information that was provided and the existence of this message so do not disregard the content.

What to do if there is no answer or the number for the DQ provider doesn't work for some reason

If it is ringing please stay on the phone for 1 minute before hanging up. Do not include any pre-recorded messages such as the example above in that timing. Please record all failed attempts to contact the DQ provider on the questionnaire and let your supervisor know.

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Call connect service

You may be offered a service where you can be connected directly to the number you are enquiring about. Please follow your allocation in terms of whether you accept using this service or not. This is what is referred to as call connect in the questionnaire.

What is the 'end point' of the call for time measurement?

If you are offered the call connect service and your call is connected the call ends when you hear the first ring.

If you do not use the call connect service it is the point where you have been provided the number you have requested. Take it to the end of the first time it is read to you and do not include a repeat, if this is applicable.

What do to when you have been connected to the number you requested

Please let this ring for 30 seconds before putting down the phone. If it is answered in this time please say 'sorry wrong number' or something similar (what are your opening hours/ are you open on boxing day/ new years day). Do not take up any of the business's time or draw attention to the call in any way.

Pricing

There are three types of pricing which may apply to the call. Please make sure you understand the difference between these and if needed please discuss with your supervisor.

    i.   **Access charge** – this is the charge made by your telephone or mobile supplier for accessing the DQ service.

    ii.   **Service charge/ Premium rate** – this is the charge made by the DQ provider for using the service

    iii.   **Call connect charge** – this is information about the cost of the call connect service rather than the call to the DQ provider

Don't panic

If something unexpected happens – for example, there is more than 1 number available, just continue with the call and make a decision. In that example, you could say something like 'hmm I am not sure, just give me the 1st number'. If necessary we can always re-do the call. The main thing is not to give any clues that it is a mystery shopping call. As suggested in point 6 please ask for customer services or bookings depending on the type of business you are calling about if you are given a choice.

Listen very carefully to how and when the information is provided to you

Please make sure you read the questionnaire thoroughly before you start. In the questionnaire we want to know:

- What information is provided
  - o Numbers
  - o Call connect
  - o Pricing
- How it is provided
  - o If read out is it automated or a call handler
  - o Do you get a text message
- When it is provided

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- If call connect is the number provided before or after you agree
- Is pricing information given before or after call connect service is initiated
- Is there an opportunity to decline call connect once pricing information is given

What happens if the DQ provider can't find the number

If you the call doesn't result in the number you asked for being found then please code 2 at Q5 and follow routing instructions. Please inform your supervisor if this happens. Don't ask for a different number, but if they make any suggestions just do whatever seems natural – accept an alternative seems like its really plausible and it would attract more attention to your call if you were being too specific.

Q18a

Please base your response here on whether you understand how much you're going to pay for making the call to DQ, and the totality of information you are provided during the entire call. If you have heard both a message from your LL/ mobile supplier and the DQ provider answer based on your overall clarity rather than the specifics relating to the individual messages.

As some guidance:

- Provided information that there are additional call costs but not specifying exact prices: **quite clear.**
- Information specifying actual prices: **extremely clear.**

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