



**Evaluation of Directory Enquiries
services**

**Of tel and ICSTIS research
November 2003**

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Chapter 1

Introduction

- 1.1 The UK directory enquiry (DQ) market was fully liberalised at the end of August 2003, replacing 192 with a variety of 118 xxx numbers. Extensive consumer research was conducted prior to the decision to liberalise the market. This showed that over 60% would not mind if 192 was replaced by a series of 5 or 6 digit numbers providing a wider range of services than basic business and residential enquiries. Some consumers were dissatisfied with the existing directory enquiry providers' ability to provide the required information and thought that they were poor value for money. Oftel took the decision to open up the market in the light of this information, as well as a cost-benefit analysis and international benchmarking. Prior to the switchover awareness of the changes was high (83% of consumers were aware of the changes in early August 2003, with over half of all directory enquiry calls going to the new 118 xxx numbers). Encouraging numbers of consumers were keen to take advantage of more choice in the DQ market.
 - 1.2 Oftel's Statement on Access Codes for Directory Enquiry Services (Sept 2001) sets out the justification for this policy. The envisaged benefits included:
 - providing consumers with increased choice
 - encouraging more varied services
 - encouraging higher quality services
 - eventual lower cost services, increasing value for money.
 - 1.3 The purpose of this research is to provide a preliminary evaluation of the immediate impact of DQ liberalisation, assessing both the usage, and the quality and delivery of the new services. Oftel and ICSTIS note that it is still very early days for many of the suppliers and for users to have tested the range of new services and suppliers (particularly given the infrequency with which some consumers use DQ services). As such, Ofcom may wish to continue to monitor and evaluate the DQ market.
 - 1.4 Prior to liberalisation, 192 services were provided by network operators such as BT. Many of these network operators are continuing to offer their directory enquiry services using 118 xxx numbers. The performance of network operators' 118 xxx services as set out in this report provides a useful benchmark, since it is likely to relate to the performance of 192 services prior to liberalisation.
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- 1.5 This research was a joint venture between OfTel and ICSTIS (Independent Committee for the Supervision of Standards of Telephone Information Services), and comprised two phases conducted in October 2003 – consumer usage conducted by NOP¹, and mystery shopping conducted by MORI² assessing the quality and delivery of a range of DQ services and suppliers, and their complaints processes.
- 1.6 This report covers:
- DQ service provision – availability and accuracy

¹ GB omnibus survey amongst 1059 adults aged 15 plus, representative of the adult population in terms of region, age, gender, and socio-economic group. Because the survey was conducted amongst a sample of adults, rather than the whole population, the data is subject to margins of error in the region of 2-3%. All data shown is weighted data. Unweighted base sizes are shown on charts and tables to show the number of people who were asked the question. Fieldwork was conducted between 9th October and 4th November 2003.

² Mystery shopping was conducted on 30 national DQ numbers, and 10 international DQ numbers. In total 2039 requests were made, covering UK and international residential and business numbers, classified searches, requests for ex-directory numbers, and additional services including cinema listings, call connect and text back. Fieldwork was conducted between 3rd and 30th October 2003. Details of the methodology used can be found in Annex A.

OfTel has conducted its own checks on the data in this report and whilst we consider it to be correct, OfTel accepts no liability in respect of any of the results provided to it by MORI or NOP or any decisions taken by any person in reliance on the report.

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- DQ cost comparisons
 - DQ complaints procedures
 - Consumer understanding and opinion of DQ liberalisation
 - Impact of DQ liberalisation on consumers' DQ usage
 - Consumer interest in the new range of additional DQ services
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Chapter 2

Summary findings

DQ service provider performance

- 95% of calls answered at first attempt
- 62% of all requests resulted in correct information being provided
- No suppliers provided ex-directory information
- Text-back available in 97% of cases
- Call connect available in 9 in 10 cases
- Classified information available and provided in two-thirds of cases
- Where inaccurate information was provided, 8 in 10 complainants were offered a refund.

Consumer opinion

- 9 in 10 GB adults aware of changes to DQ services
- 4 in 10 have used one of the new numbers
- 1 in 10 consumers aware of the changes have already used at least one of the additional services DQ suppliers are now able to offer
- 4 in 10 GB adults aware of changes are interested in using the additional services

3 in 5 requests resulted in the provision of an accurate number, with varying availability and delivery times across providers

- 2.1 57% of *national* number requests were provided accurately or at least a suitable alternative offered – little difference between residential (54%) and business (60%) numbers. Encouragingly, no providers provided ex-directory information. Accurate provision of international numbers was lower than national requests at 37%.
 - 2.2 Availability of additional services advertised such as text back and call connect was high at 97% and 90% respectively. Where call connect was available, three quarters of requests were accurately connected, although in 3 in 10 cases the onward call charges were not offered. In 7 in 10 requests for text back the correct number was received, and suppliers were able to provide the necessary information in three-quarters of requests for classified searches (where available).
 - 2.3 Where inaccurate information was provided, 8 in 10 complainants were offered a refund; 50% for both the original and the complaints call.
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Most consumers are now aware of the changes to DQ services, and almost half of these are interested in using at least some of the additional services

2.4 9 in 10 consumers are aware of the changes to the DQ services and around 4 in 10 claim to have used one of the new numbers rising to 8 in 10 amongst frequent callers. 118 118 (The Number UK Ltd), 118 500 (BT) and 11 88 88 (Conduit) are currently the most popular choices. Around one third of consumers are aware of the range of new enhanced services available on 118 numbers and 1 in 10 consumers have already used at least one of these additional services. These findings indicate a fairly high conversion rate to using the additional services once aware.

Two-thirds of DQ users continue to call these services using the new numbers, while 1 in 5 customers claim to use DQ less – largely deterred by cost

2.5 Two-thirds of users have not changed their usage patterns following the introduction of the new DQ services. Of the 1 in 5 DQ customers that claimed to have reduced their usage, the main reason given for doing so was 'cost' and for a minority, 'poor service'. Phonebooks and Internet DQ facilities have become more important for this group. As awareness of the additional services rises, interest levels suggest usage might reasonably be expected to change.

2.6 In summary, amongst consumers there was high recognition of the new numbers and fairly high usage coupled with encouraging levels of interest in the enhanced services being offered in addition to a basic DQ service. With regard to the level of service consumers are receiving there are high levels of availability of the claimed services, and varying levels of delivery in terms of the accuracy of number provision. Oftel and ICSTIS will continue to monitor the DQ market. Oftel will be recommending to Ofcom that it repeat this work with ICSTIS in the second half of 2004.

Chapter 3

DQ delivery – availability and accuracy

Background

- 3.1 The following information sets out the range of DQ suppliers and services available as at September 2003 when Oftel commenced this evaluation.
- 3.2 DQ suppliers available:
- 79 national DQ numbers (50 providers) had been approved by ICSTIS to provide national DQ voice services. A further 4 were operating test lines, 4 were offering text only services and 1 was providing a specialist service.
 - 37 international DQ numbers were in operation (32 providers). Most offer a basic international directory service.
- 3.3 Types of DQ services available:
- Being connected to the number requested (call connect): 47 DQ numbers are live, approved by ICSTIS and offering call connect services.
 - Having the number texted to your mobile (text back): 11 DQ numbers are live, approved and offering a text back service, rising to 15 including 4 text-only services
 - Requesting classified business numbers: 18 of the 30 national numbers selected offer classified business details.
- 3.4 Additional services offered by selected DQ providers:
- Welsh speaking service – advertised by 2 providers
 - Being connected to a neighbour - advertised by 1 provider
 - Being connected on the basis of being able to provide the name of someone living with someone else – advertised by 1 provider
 - Cinema/TV listings – advertised by 3 providers
 - Gay and lesbian information – advertised by 2 providers
- 3.5 A range of different pricing structures exist and prices are compared on different call types across suppliers:
- Flat fee for whole call regardless of length
 - Initial connection charge (which includes first minute of call) + pence per second (pps) charge for remainder of call
 - Initial connection charge (which does not include first minute of call) + pps charge for the whole call from the start of the call
 - No connection charge and pps charge for whole call
- 3.6 Oftel selected a total of 30 national DQ providers and 10 international DQ providers to include in this initial mystery shopping evaluation. The full list can be found in Annex A. The selection process was based on the following criteria:
- Suppliers subscribing to the Oftel-supported DQ website listing at www.newdirectoryenquiries.com
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- High profile suppliers
 - Suppliers receiving extensive press coverage
 - Suppliers about which Ofcom or ICSTIS had received complaints
 - Suppliers offering value added services
 - Telecom suppliers offering DQ services
 - Alternative services provided by a single supplier (eg flat rate service versus pps charging).
- 3.7 In total 2039 requests were made, spread across 40 suppliers, and different times of the day (weekday and weekend). The same requests were made to each supplier³.
- UK residential numbers - 29 suppliers, 637 requests
 - UK business numbers - 30 suppliers, 545 requests
 - International numbers – 10 suppliers, 273 requests
 - Ex-directory numbers – 29 suppliers, 86 requests
 - Text back – 9 suppliers, 174 requests
 - Call connect – 14 suppliers, 185 requests
 - Classified searches – 20 suppliers, 119 requests
 - Cinema listings - 3 suppliers, 20 requests
- 3.8 Ofcom and ICSTIS note that it is possible that some of the services tested may actually be delivered by the same underlying service provider, despite ostensibly having different brand names. However, since information about such arrangements is commercially sensitive and has not in all cases been shared with Ofcom and ICSTIS, it has not been possible for this to be taken into account in this report.
- 3.9 It also became apparent that some breaches of the ICSTIS code were occurring, most noticeably with call connect - either not being given the cost before being put through or onward connection occurring before being offered or requested. ICSTIS will be taking these issues forward in due course.

Availability and accuracy of service provision

Overall performance

- 3.10 Few problems were experienced contacting the DQ suppliers, with 95% of calls answered on the first attempt. Half of the numbers were provided by an operator and the other half by an automated voice system.
- 3.11 Across all requests made for numbers, 62% resulted in the correct number (or non-provision in the case of ex-directory numbers), or a suitable alternative, being provided. The detail across different suppliers and different types of request is set out below. Note that the figure of 62% does not necessarily reflect the overall level of accuracy being experienced in the market as a whole, as the data has not been weighted for the market share of the different services.

³ The number of calls made to each supplier was dependent on the number of requests each supplier allows to be made during one call. For example some suppliers allow only one request to be made whereas others allow unlimited requests.

Standard UK residential and business numbers

3.12 A total of 1183 requests were made across the 30 suppliers for standard residential and business UK numbers. On average almost 3 in 5 (57%) were correctly provided or a suitable alternative offered, with little difference between residential (54%) and business (60%) requests. Individual supplier performance ranged from 22% to 83% for accurate provision of these numbers. For the remainder of requests, about half of the numbers provided were inaccurate, and the other half simply weren't provided. Full performance details are shown in figure 3a.

3.13 Suppliers performing on or above average on both residential and business requests are shaded in figure 3a.

Figure 3a: Accuracy of provision of standard residential and business UK numbers
 Base: 637 UK residential requests, 545 UK business requests, Oct 03

	Number of residential requests made	% correct UK residential numbers	Number of business requests made	% correct UK business numbers
118 000 (Orange)	21	48	18	50
118 080 (Simunix)	25	60	18	50
118 099 (C & W)	21	48	18	50
118 111 (One .tel)	21	57	18	56
118 114 (Opal Telecom)	24	63	17	65
118 118 (The Number UK Ltd)	22	59	24	67
118 119 (192.com)	23	43	18	56
118 180 (Telewest)	29	55	10	40
118 212 (Maureen)	21	48	18	56
118 247 (Yell Ltd.)	22	45	18	72
118 288 (Kingston)	21	62	17	76
118 321 (Tesco)	21	57	18	61
118 355 (Thus)	21	33	18	61
118 404 (BT Welsh)	28	57	21	76
118 429 (118 GAY)	-	-	18	56
118 453 (Freedom Discovery)	21	57	18	72
118 499 (Share Charity)	27	67	19	74
118 500 (BT)	21	62	21	71
118 511 (British Gas)	21	48	19	63
118 707 (BT)	21	57	18	67
118 747 (UK Directory Assistance)	21	62	18	61
118 770 (Telewest)	21	62	18	39
118 800 (Directory Enquiries UK)	16	63	18	61
118 811 (One)	22	45	19	53
11 88 66 (Telegate)	20	45	19	68
11 877 (Telco Global)	21	57	18	61
11 878 (ntl)	19	58	18	50
11 88 88 (Conduit)	21	52	18	61
11 88 88 (Conduit Welsh)	21	52	17	83
118 895 (ntl)	24	33	18	22
Total	637	54	545	60

International numbers

- 3.14 International services of 10 of the main suppliers were tested. Just over a third of requests (37%) for international business and residential numbers resulted in accurate provision of the number or a suitable alternative. In almost a quarter of requests an inaccurate number was provided, and the number could not be found in the remainder of requests.
- 3.15 Supplier performance on international DQ provision ranged from 29% to 48% accuracy as shown in figure 3b. As before, above average performers are highlighted.

Figure 3b: Accuracy of provision of international residential and business numbers
Base: 273 international number requests, Oct 03

	Number of international requests made	% correct / suitable alternative international numbers
118 003 (ntl)	27	29
118 190 (Telewest)	28	36
118 211 (One.tel)	28	36
118 449 (C&W)	28	36
118 486 (Thus)	26	35
118 505 (BT)	28	36
118 840 (Telco Global)	29	31
11 88 66 (Telegate)	28	39
118 880 (Orange)	26	46
11 88 99 (Conduit)	25	48
Total	273	37

Ex-directory numbers

- 3.16 29 suppliers were tested for ex-directory numbers to ensure that these are not being provided. No suppliers provided the ex-directory number requested, confirming it was either ex-directory or not listed.

Text back

- 3.17 Nine suppliers were tested for their text back service, where the number requested is sent to the consumer's mobile phone by SMS. Text back was available in 97% of requests, and about 7 in 10 of these resulted in the supplier being able to provide an accurate text back. Above average performance in text back availability and delivery is shown in figure 3c. Three suppliers failed to achieve these levels, the majority of this being failed delivery rather than delivery of an inaccurate number. This might however be due to the mobile operators' networks however, and cannot necessarily be attributed to the DQ providers. Suppliers performing on or above average on text back availability and accuracy are shaded in figure 3c.

Figure 3c: Delivery and accuracy of text back service
 Base: Suppliers offering text back, 174 requests, Oct 03

	Number of requests made	% text back available	% received correct number by text*	% received incorrect number by text*	% text not received *
118 000 (Orange)	18	100	89	11	-
118 118 (The Number UK Ltd)	18	100	89	6	6
118 119 (192.com)	18	100	72	17	11
118 212 (Maureen)	18	100	78	17	6
118 247 (Yell Ltd.)	18	100	72	17	11
118 404 (BT Welsh)	14	100	71	14	14
118 500 (BT)	18	89	19	6	75
11 88 66 (Telegate)	18	94	53	-	47
11 88 88 (Conduit, inc Welsh)	34	94	72	19	9
Total	174	97	69	12	18

* Number of requests made was dependent on whether text back was available when requested.

3.18 In just 15% of requests did text back suppliers offer this service spontaneously. Some however automatically text back without requesting.

Call connect

3.19 14 suppliers were tested on their connect facilities and in 9 in 10 requests this service was found to be available. In 5% of cases, the call was connected before the caller had requested it. In 3 in 10 requests, the caller was not told the costs at any stage, and in just over two in five requests (44%) the caller was not offered the number before being connected.

3.20 During the period of this research OfTel and ICSTIS were in dialogue with DQ service providers in order to clarify the requirements to confirm the cost of call connection prior to putting a consumer through to the number requested.

3.21 Where call connect was available, three-quarters of requests resulted in connection to the correct number, only 6% to the wrong number, and just less than a fifth weren't connected. Most suppliers accurately connected the vast majority of requests, with only four delivering below average service in this area. Suppliers performing on or above average on call connect availability and delivery are shaded in figure 3d.

Figure 3d: Delivery and accuracy of call connect service
Base: Suppliers offering call connect, 185 requests, Oct 03

	Number of requests made	% call connect available	% connect ed to correct number*	% connect ed to incorrect number*	% not connect ed*
118 000 (Orange)	12	100	92	-	8
118 118 (The Number UK Ltd)	13	92	83	8	8
118 119 (192.com)	12	100	83	17	-
118 180 (Telewest)	14	93	8	8	85
118 212 (Maureen)	13	85	82	-	18
118 247 (Yell Ltd.)	12	100	92	-	8
118 355 (Thus)	12	25	33	-	67
118 404 (BT Welsh)	14	100	57	7	36
118 500 (BT)	12	92	100	-	-
118 747 (UK Directory Assistance)	12	92	91	9	-
118 800 (Directory Enquiries UK)	12	83	90	-	10
11 88 66 (Telegate)	12	100	92	-	8
11 877 (Telco Global)	12	92	91	9	-
118 888 (Conduit, inc Welsh)	23	100	65	13	22
Total	185	90	76	6	18

* Number of requests made was dependent on whether call connect was available when requested.

Additional services

Classified searches

3.22 20 suppliers were tested on the availability and delivery of their classified services, where consumers can request the name and numbers for particular business types in particular areas. Classified services were available in about 9 in 10 requests, and where available, suppliers were able to provide a number in about three-quarters of cases. Delivery varied from success rates of about 40% to 100% (figure 3e). Five suppliers (highlighted) offered above average availability and delivery of classified searches. Where the information requested was available, a third of these resulted in more than one number being offered. Suppliers performing on or above average on classified service availability and delivery are shaded in figure 3e. Note: this table is based on a small number of classified requests (6 on average) being made to each operator, results should therefore be regarded with caution.

Figure 3e: Availability and delivery of classified services
 Base: Suppliers offering classified services, 119 requests, Oct 03

	Number of requests made	% classified service available	% able to provide information requested*
118 000 (Orange)	6	83	80
118 080 (Simunix)	6	67	50
118 099 (C & W)	6	83	40
118 114 (Opal Telecom)	6	100	83
118 118 (The Number UK Ltd)	6	100	67
118 119 (192.com)	6	83	100
118 212 (Maureen)	6	100	83
118 247 (Yell Ltd.)	6	100	50
118 321 (Tesco)	6	83	60
118 355 (Thus)	6	67	50
118 404 (BT Welsh)	6	100	83
118 429 (118 GAY)	6	67	100
118 453 (Freedom Discovery)	6	83	80
118 500 (BT)	6	100	67
118 511 (British Gas)	6	83	40
118 811 (One)	5	100	100
11 88 66 (Telegate)	6	50	100
11 877 (Telco Global)	6	67	75
11 878 (ntl)	6	100	67
118 888	6	100	83
Total	119	86	73

* Number of requests made was dependent on whether classified service was available when requested.

Cinema listings

3.23 Three suppliers – 118 118 (The Number UK Ltd), 118 404 (BT Welsh), and 118 500 (BT) - were tested on their cinema listings service, where a consumer can find out the times of shows in particular cinemas. Of the 20 requests made, 45% successfully provided the information requested – little difference across the three suppliers.

Chapter 4

DQ timing and cost comparisons

Overall Performance

- 4.1 The following tables show the ranking of each DQ supplier for residential, business and international requests on three factors: cost (based on calls made from a BT line, apart from two ntl DQ services (118 878 and 118 003) which are based on the cost from an ntl line as these numbers are not listed on BT's DQ pricing website), time taken to get a number and accuracy of the number given. As the relative importance of each of these factors will differ from consumer to consumer - for example some may not mind having to wait a long time if the cost is lower whereas for others speed may be more important than cost - no overall ranking has been calculated.
 - 4.2 The following tables have been ordered on cost but should not be taken as an indication of recommended 'best buys' from Oftel or ICSTIS
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Figure 4a: Overall performance on provision of UK residential numbers

	Ranking		
	Cost of call	Time taken to provide the number	Accuracy of number provided
118 800 (Directory Enquiries UK)	1	23	2
118 770 (Telewest)	2	1	4
118 355 (Thus)	2	13	28
118 811 (One)	2	21	24
118 288 (Kingston)	5	18	4
118 404 (BT Welsh)	6	6	11
118 877 (Telco Global)	6	11	11
118 707 (BT)	8	4	11
118 180 (Telewest)	8	1	17
118 321 (Tesco)	8	9	11
118 111 (One.tel)	8	11	11
118 099 (C &)	8	3	20
118 511 (British Gas)	8	7	20
11 88 88 (Conduit)	14	7	18
118 212 (Maureen)	15	15	20
118 114 (Opal telecom)	16	16	2
118 878 (ntl)	16	13	10
118 453 (Freedom Discovery)	18	5	11
11 88 88 (Conduit Welsh)	18	20	18
118 499 (Share Charity)	20	22	1
118 119 (192.com)	21	19	27
118 000 (Orange)	22	27	20
118 500 (BT)	23	10	4
118 080 (Simunix)	24	28	8
118 247 (Yell Ltd)	25	29	24
118 866 (Telegate)	26	24	24
118 118 (The Number)	27	25	9
118 747 (UK Directory Assistance)	28	16	4
118 895 (ntl)	29	25	28

Figure 4b: Overall performance on provision of UK business numbers

	Ranking		
	Cost of call	Time taken to provide the number	Accuracy of number provided
118 800 (Directory Enquiries UK)	1	25	13
118 355 (Thus)	2	26	13
118 811 (One)	2	24	22
118 770 (Telewest)	2	20	28
118 288 (Kingston)	5	2	2
118 247 (Yell Ltd)	5	23	5
118 404 (BT Welsh)	7	1	3
118 877 (Telco Global)	7	15	13
118 707 (BT)	9	3	9
118 321 (Tesco)	9	5	13
118 511 (British Gas)	9	10	12
118 099 (C & W)	9	8	23
118 111 (One.tel)	9	18	19
11 88 88 (Conduit)	14	12	13
118 212 (Maureen)	14	7	19
118 180 (Telewest)	14	27	27
118 499 (Share Charity)	17	5	4
118 114 (Opal telecom)	17	17	11
118 878 (ntl)	17	14	23
11 88 88 (Conduit Welsh)	20	20	1
118 500 (BT)	21	4	7
118 119 (192.com)	21	12	19
118 453 (Freedom Discovery)	23	9	5
118 000 (Orange)	24	16	23
118 080 (Simunix)	24	28	23
118 118 (The Number)	26	29	9
118 866 (Telegate)	27	20	8
118 895 (ntl)	27	18	29
118 747 (UK Directory Assistance)	29	10	13

Figure 4c: Overall performance on provision of international numbers

	Ranking		
	Cost of call	Time taken to provide the number	Accuracy of number provided
11 88 66 (Telegate)	1	10	3
11 88 99 (Conduit)	2	4	1
118 449 (C&W)	3	2	4
118 003 (ntl)	4	9	10
118 505 (BT)	5	1	4
118 880 (Orange)	6	2	2
118 486 (Thus)	7	7	8
118 211 (One.tel)	8	6	4
118 840 (Telco Global)	9	5	9
118 190 (Telewest)	10	8	4

Timings

National calls

- 4.3 The overall average time spent waiting for a call to national DQ services to be answered in person was 6 seconds. Calls to 118 111 (One .tel) had the shortest average waiting time (2 seconds) and calls to 118 080 (Simunix) the longest (21 seconds). 12 operators used an automatic answer message at least some of the time, the rest always answered in person.
- 4.4 The overall average times from the end of dialling to being given a residential number and to being given a business number were very similar: 50 seconds for residential and 46 seconds for a business number. Suppliers delivering both residential and business numbers in under average times are highlighted in the table below⁴.

⁴ Timing began at the end of dialling and all times shown in the following tables are measured from this point.

Figure 4d: Average time (seconds) from dialling to being answered and getting a number

Base: 1898 total calls, 493 residential requests, 401 business requests, Oct '03

	Answered by recorded message	Answered in person	Given a residential number	Given a business number
118 000 (Orange)	5	6	72	43
118 080 (Simunix)		21	73	65
118 099 (C & W)		4	33	37
118 111 (One .tel)		2	47	47
118 114 (Opal Telecom)		3	50	44
118 118 (The Number UK Ltd)	5	7	70	68
118 119 (192.com)		9	55	40
118 180 (Telewest)		6	24	62
118 212 (Maureen)		4	49	35
118 247 (Yell Ltd.)		6	78	52
118 288 (Kingston)		4	51	28
118 321 (Tesco)		3	45	32
118 355 (Thus)		5	48	57
118 404 (BT Welsh)	13	14	43	24
118 429 (118 GAY)		9	n/a	219*
118 453 (Freedom Discovery)		6	40	38
118 499 (Share Charity)	3	4	60	32
118 500 (BT)	4	5	46	31
118 511 (British Gas)	2	4	44	39
118 707 (BT)	3	4	35	30
118 747 (UK Directory Assistance)	9	11	50	39
118 770 (Telewest)		6	24	50
118 800 (Directory Enquiries UK)	9	12	62	54
118 811 (One)	2	6	59	53
11 88 66 (Telegate)	4	6	66	50
11 877 (Telco Global)		2	47	42
11 878 (ntl)		4	48	41
11 88 88 (Conduit English)		5	44	40
11 88 88 (Conduit Welsh)	3	11	57	50
118 895 (ntl)		4	70	47
Average times	5	6	50	46
Max	13	21	78	219
Min	3	2	24	24

*average call time for 118 429 (118 GAY) based on only 6 calls, one of which was exceptionally long.

International calls

4.5 It generally takes longer to provide an international number than a national one, with an average time of 109 seconds taken to get an international number. Only one international provider 11 88 66 (Telegate) was sometimes answered by a recorded message. Suppliers delivering the number in a below average length of time are highlighted below.

Figure 4e: Average time (seconds) from dialling to being answered and getting a number

Base: 273 international requests made, 164 calls where a number was given Oct '03

	Being answered by recorded message	Being answered in person	Being given a number
118 003 (ntl)		5	167
118 190 (Telewest)		6	129
118 211 (One.tel)		2	93
118 449 (C&W)		4	73
118 486 (Thus)		5	95
118 505 (BT)		6	66
118 840 (Telco Global)		3	88
11 88 66 (Telegate)	5	6	222
118 880 (Orange)	5	5	73
11 88 99 (Conduit)		6	78
Average times	5	6	109
Max	5	6	222
Min	5	2	66

Relative costs of obtaining numbers from different DQ operators

- 4.5 The majority of calls were made from Cable and Wireless landlines. Numbers available only via the cable operators were called from the appropriate operator and text-back requests were made from mobile telephones. Calls to 118 404 (BT's Welsh service) and half the calls made to 11 88 88 (Conduit) were made from Wales in the Welsh language.
- 4.6 For the purposes of the following cost calculations, we have assumed that a call made to a DQ operator would take the same amount of time, regardless of the origination of the call.
- 4.7 Average costs for each type of request made to each DQ service provider have been calculated using the actual time taken to complete each type of request and applying the cost structure appropriate to each DQ operator on each of the networks.
- 4.8 Costs have been calculated for calls made from the following service providers, taken from information available on the service providers' own websites on 31st October 2003⁵:

- **Fixed lines:**
- BT
- Kingston Communications

- **Mobile operators:**
- Orange
- O2
- T-Mobile
- Vodafone

- **Cable operators:**
- Ntl
- Telewest

⁵ Whilst every reasonable effort has been made to ensure the accuracy of the costing calculations, no guarantees for the accuracy are made. The cost of calling 11 88 88, Conduit, from a BT line changed on 31st October 2003. The revised cost has been used for the purpose of these calculations for calls from BT. At the time of writing Ofcom understands that Kingston Communications, ntl and Telewest had not been asked by Conduit to change the price of calling 11 88 88.

NB the costs shown are averages of the cost of all calls (of each specific type) made to each operator, they are not the cost of an average time call and therefore direct comparisons with table 4d can not be made.

Figure 4f: Comparative costs for UK residential numbers from landlines (average pence per call based on supplier's timings to receive one number)

	BT	Kingston	NTL	Telewest
118 000 (Orange)	52	52	-	-
118 080 (Simunix)	54	54	-	-
118 099 (C & W)	35	35	-	-
118 111 (One .tel)	35	35	-	-
118 114 (Opal Telecom)	40	40	-	-
118 118 (The Number UK Ltd)	60	60	60	60
118 119 (192.com)	51	51	-	-
118 180 (Telewest)	35	-	-	35
118 212 (Maureen)	38	-	-	-
118 247 (Yell Ltd.)	56	56	-	-
118 288 (Kingston)	32	32	-	-
118 321 (Tesco)	35	35	-	-
118 355 (Thus)	30	30	-	-
118 404 (BT Welsh)	34	34	-	-
118 429 (118 GAY)	-	-	-	-
118 453 (Freedom Discovery)	43	43	-	-
118 499 (Share Charity)	49	49	-	-
118 500 (BT)	53	53	-	-
118 511 (British Gas)	35	40	-	-
118 707 (BT)	35	40	-	-
118 747 (UK Directory Assistance)	64	-	-	-
118 770 (Telewest)	30	-	-	30
118 800 (Directory Enquiries UK)	23	-	-	-
118 811 (One)	30	58	30	30
11 88 66 (Telegate)	57	43	-	-
11 877 (Telco Global)	34	35	-	-
11 878 (ntl)	40	-	40	-
11 88 88 (Conduit English)	37	20	37	32
11 88 88 (Conduit Welsh)	43	22	43	38
118 895 (ntl)	-	-	65	-
Average cost	41	40	40	35
Max	64	60	65	60
Min	23	20	30	30

Figure 4g: Comparative costs for UK residential numbers from mobile phones (average pence per call based on supplier's timings to receive one number)

	O2	Orange	Vodafone	T-mobile
118 000 (Orange)	74	59	80	114
118 080 (Simunix)	70	-	184	-
118 099 (C & W)	50	-	50	65
118 111 (One .tel)	80	60	50	66
118 114 (Opal Telecom)	80	-	-	77
118 118 (The Number UK Ltd)	86	95	94	99
118 119 (192.com)	72	91	75	72
118 180 (Telewest)	-	-	-	-
118 212 (Maureen)	68	-	66	-
118 247 (Yell Ltd.)	101	83	83	101
118 288 (Kingston)	50	46	50	78
118 321 (Tesco)	80	60	-	68
118 355 (Thus)	50	-	-	65
118 404 (BT Welsh)	65	60	52	75
118 429 (118 GAY)	-	-	-	-
118 453 (Freedom Discovery)	66	61	63	66
118 499 (Share Charity)	65	-	72	65
118 500 (BT)	60	90	78	70
118 511 (British Gas)	80	200	60	-
118 707 (BT)	65	85	60	65
118 747 (UK Directory Assistance)	101	-	-	-
118 770 (Telewest)	-	-	-	-
118 800 (Directory Enquiries UK)	30	-	87	89
118 811 (One)	27	60	89	70
11 88 66 (Telegate)	71	63	76	71
11 877 (Telco Global)	70	-	50	70
11 878 (ntl)	-	60	-	-
11 88 88 (Conduit English)	65	38	60	65
11 88 88 (Conduit Welsh)	71	54	66	71
Average cost	70	74	70	72
Max	101	200	184	114
Min	30	38	50	65

Figure 4h: Comparative costs for UK business numbers from landlines (average pence per call based on supplier's timings to receive one number)

	BT	Kingston	NTL	Telewest
118 000 (Orange)	50	50	-	-
118 080 (Simunix)	50	50	-	-
118 099 (C & W)	35	35	-	-
118 111 (One .tel)	35	35	-	-
118 114 (Opal Telecom)	40	40	-	-
118 118 (The Number UK Ltd)	58	58	58	58
118 119 (192.com)	43	43	-	-
118 180 (Telewest)	37	-	-	37
118 212 (Maureen)	37	-	-	-
118 247 (Yell Ltd.)	32	32	-	-
118 288 (Kingston)	32	32	-	-
118 321 (Tesco)	35	35	-	-
118 355 (Thus)	30	30	-	-
118 404 (BT Welsh)	33	33	-	-
118 429 (118 GAY)	173*	173*	-	-
118 453 (Freedom Discovery)	46	46	-	-
118 499 (Share Charity)	40	40	-	-
118 500 (BT)	43	43	-	-
118 511 (British Gas)	35	40	-	-
118 707 (BT)	35	38	-	-
118 747 (UK Directory Assistance)	64	-	-	-
118 770 (Telewest)	30	-	-	30
118 800 (Directory Enquiries UK)	21	-	-	-
118 811 (One)	30	56	30	30
11 88 66 (Telegate)	59	47	-	-
11 877 (Telco Global)	33	35	-	-
11 878 (ntl)	40	-	40	-
11 88 88 (Conduit English)	37	20	37	32
11 88 88 (Conduit Welsh)	41	21	41	36
118 895 (ntl)	-	-	59	-
Average cost	43	42	41	36
Max	173	173	59	58
Min	21	20	30	30

*Caution: small base including one exceptionally long call time

Figure 4i: Comparative costs for UK business numbers from mobile phones (average pence per call based on supplier's timings to receive one number)

	O2	Orange	Vodafone	T-mobile
118 000 (Orange)	69	59	77	106
118 080 (Simunix)	65	-	180	-
118 099 (C & W)	50	-	50	67
118 111 (One .tel)	80	60	50	68
118 114 (Opal Telecom)	80	-	-	78
118 118 (The Number UK Ltd)	73	87	89	84
118 119 (192.com)	66	86	64	66
118 180 (Telewest)	-	-	-	-
118 212 (Maureen)	65	-	63	-
118 247 (Yell Ltd.)	73	48	48	73
118 288 (Kingston)	50	25	50	75
118 321 (Tesco)	80	60	-	65
118 355 (Thus)	50	-	-	73
118 404 (BT Welsh)	65	60	51	75
118 429 (118 GAY)	230*	209*	209*	230*
118 453 (Freedom Discovery)	74	68	66	74
118 499 (Share Charity)	65	-	59	65
118 500 (BT)	39	85	64	65
118 511 (British Gas)	80	200	60	-
118 707 (BT)	65	85	57	65
118 747 (UK Directory Assistance)	103	-	-	-
118 770 (Telewest)	-	-	-	-
118 800 (Directory Enquiries UK)	27	-	88	82
118 811 (One)	26	60	85	66
11 88 66 (Telegate)	87	70	84	87
11 877 (Telco Global)	65	-	50	65
11 878 (ntl)	-	60	-	-
11 88 88 (Conduit English)	65	35	60	65
11 88 88 (Conduit Welsh)	67	47	62	67
Average cost	71	74	70	76
Max	230	209	209	230
Min	27	25	50	65

*Caution: small base including one exceptionally long call time

Figure 4j: Comparative costs for international numbers from landlines (average pence per call based on supplier's timings to receive one number)

	BT	Kingston	NTL	Telewest
118 003	-	-	160	-
118 190 (Telewest)	275	-	-	275
118 211 (One.tel)	223	222	-	-
118 449 (C&W)	149	149	-	-
118 486 (Thus)	209	209	-	-
118 505 (BT)	191	170	-	-
118 840 (Telco Global)	245	245	-	-
11 88 66 (Telegate)	86	106	-	-
118 880 (Orange)	200	200	-	-
11 88 99 (Conduit)	98	-	-	98
Average cost	181	184	160	171
Max	245	245	160	180
Min	86	106	160	98

Figure 4k: Comparative costs for international numbers from mobile phones (average pence per call based on supplier's timings to receive one number)

	O2	Orange	Vodafone	T-mobile
118 003 (ntl)	-	-	-	-
118 190 (Telewest)	-	-	-	-
118 211 (One.tel)	333	200	266	-
118 449 (C&W)	140	-	219	211
118 486 (Thus)	294	-	-	-
118 505 (BT)	176	243	204	318
118 840 (Telco Global)	369	-	294	277
11 88 66 (Telegate)	267	154	205	267
118 880 (Orange)	89	-	225	-
11 88 99 (Conduit)	283	73	131	92
Average cost	240	161	214	225
Max	369	243	294	318
Min	89	73	131	92

Chapter 5

DQ complaints procedures

- 5.1 Overall, just over 4 in 10 requests for residential and business numbers resulted in a complaint for a variety of reasons, including no number was given, the wrong number (that was not a suitable alternative) was given, the caller asked to be connected and either failed to be connected or was connected to the wrong number.
- 5.2 Since no supplier provided 100% accuracy each supplier was contacted about one or more of the inaccuracies. In total 152 complaints were made although no attempt was made to recoup a refund, the objective being to establish the existence of a complaint and refund facility and the process for doing so.
- 5.3 To make their complaint, the mystery shoppers in the first instance called the original number they had contacted. The majority of complaints were dealt with at source (ie by the first operator called, or their supervisor). Some were put through to another department or told to call a different number, and only a few had to submit a written complaint.
- 5.4 In three-quarters of cases the consumer was asked for details of the complaint ie the original number request and what had been provided etc. About 6 in 10 were offered a refund, and a further 2 in 10 indicated that a refund could be arranged had they pursued the matter further. About half of all complainants were offered a full refund for both the original and subsequent complaints call.
- 5.5 During the period of research, Ofcom and ICSTIS were in dialogue with DQ service providers about appropriate refund policies, and in particular whether a refund should be offered proactively or only reactively. It has subsequently been clarified that refunds should be offered proactively to consumers who do not obtain the correct number, having given sufficient information to obtain the number and where the number is otherwise available on the DQ database.
-

Chapter 6

Consumer response to DQ liberalisation

DQ usage

- 6.1 Two-thirds of GB adults claim to use telephone DQ services, including about a quarter who use them at least once a month. There has been little change in these levels over recent years.
- 6.2 Frequent DQ customers (calling at least monthly) tended to be younger and from higher socio-economic groups (generally more affluent).

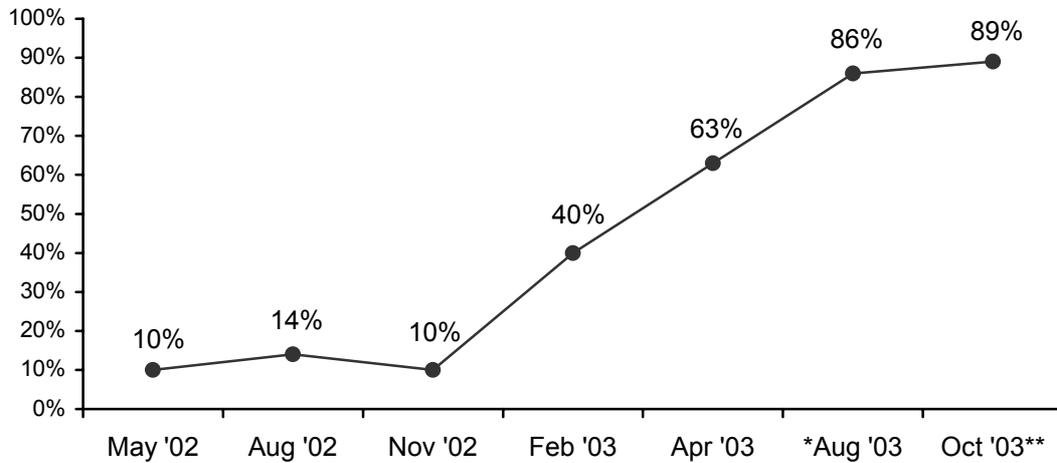
Impact of liberalisation on DQ usage

- 6.3 Since the introduction of the new DQ numbers and additional services, two-thirds of DQ customers aware of the changes said their usage has remained the same. About 1 in 5 however said they had used DQ services less frequently since the introduction of the new numbers, about half of whom were deterred by the cost, and a minority by poor service. Paper directories and the Internet had become increasingly important alternative sources for these consumers. 1% of those aware of the changes claimed to have used DQ services more since liberalisation, attracted by better value for money and the wider range of services. As awareness of the additional services increases, interest levels (figure 6b) suggest that usage might reasonably be expected to change further.

Awareness of DQ changes

- 6.4 9 in 10 GB adults were aware by mid October of the changes to the DQ services. This includes three-quarters who were aware that the new numbers were in use, and about 15% who were aware of the changes but hadn't realised the numbers were already available. Awareness has been growing steadily since May 2002 when monitoring began (figure 6a).
- 6.5 Awareness of the DQ changes is high even among consumers who don't currently use DQ telephone services – 84%, and rises to 92% among existing DQ customers, and 96% amongst frequent callers. 8% of DQ customers were not aware of the changes, and mostly weren't sure where they would find the new numbers – the vast majority of these were infrequent callers.
-

Figure 6a: Awareness of changes to DQ services
Base: GB / UK adults (Base: variable, 1000-2000)



* based on GB adults with a fixed line phone

** based on GB adults

- 6.6 Both spontaneous awareness of the new DQ numbers and number recognition (prompted awareness) have risen significantly since August. Two-thirds of all adults were able to spontaneously and correctly name one of the new numbers (this has risen significantly from 50% in August), rising to three-quarters amongst existing DQ customers.
- 6.7 Number recognition (prompted), has risen to almost 9 in 10 (86%) among those aware of the DQ changes, equivalent to about 8 in 10 of all adults. Awareness and recognition remains highest for 118 118 (The Number UK), but is now followed by 118 500 (BT), which has taken over from 11 88 88 (Conduit) since August, consistent with changes in advertising during this period.

Awareness of pricing changes

- 6.8 Only 6% of those aware of the DQ changes thought that BT's 192 service was free of charge from a fixed line phone (equivalent to about 5% of all consumers). The remainder gave a range of prices, averaging about 38 pence (very close to the actual charge of forty pence per call), or weren't sure of the price. This knowledge was largely similar between users and non-users of DQ services. Similarly, the majority (7 in 10) of those aware of the DQ changes knew that the new suppliers charged different prices. This was higher amongst existing users compared to non-users, and increased with frequency of use. Only 1 in 10 of those aware of the changes believed that the suppliers all charged the same.

Use of new numbers

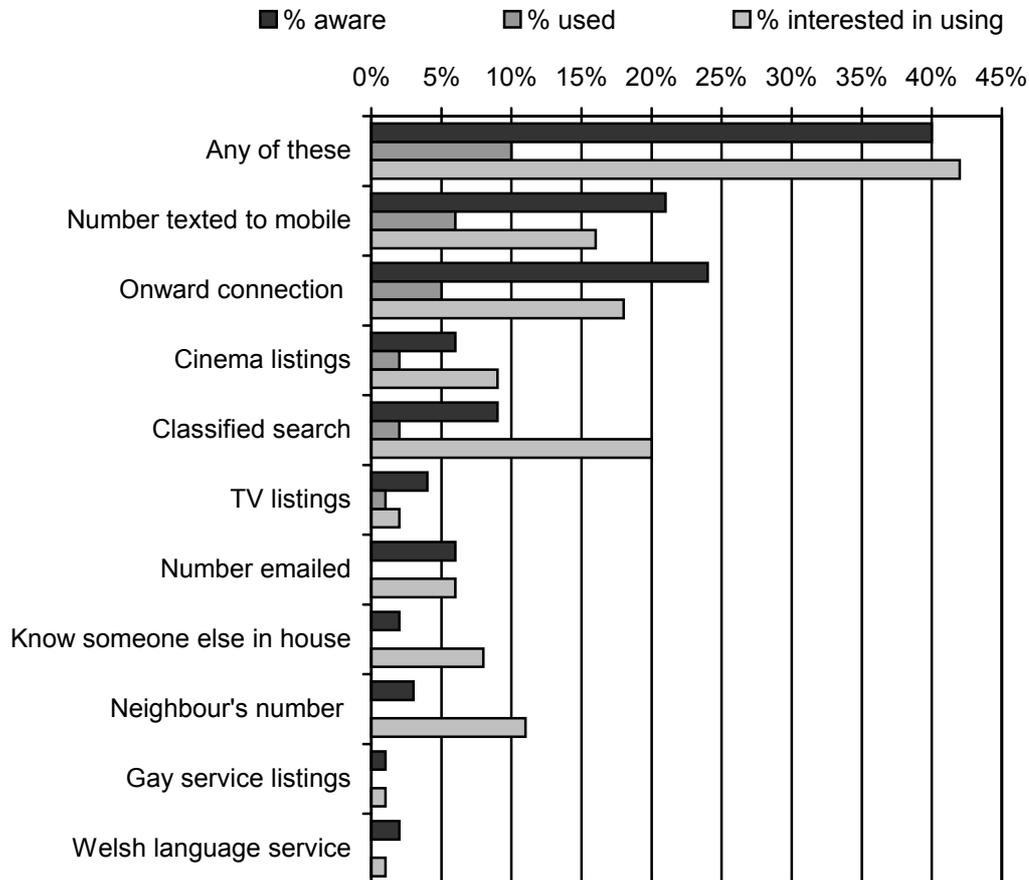
- 6.9 Almost half (47%) of DQ customers claimed to have called one of the new DQ numbers by mid October (equivalent to about 4 in 10 GB adults), rising to 8 in 10 amongst frequent DQ callers. Consistent with awareness figures, 118 118 (The

Number UK), 118 500 (BT), and 11 88 88 (Conduit) were the most popular choices to date, driven primarily by advertising and number awareness at the time of calling.

Awareness, use, and interest in new range of services

- 6.10 About a third of consumers were aware of at least some of the additional services on offer from DQ suppliers – primarily onward connection and number sent by text to mobile. About 1 in 5 were aware of other alternatives such as classified services, cinema and TV listings, numbers available without knowing the owner’s name, and numbers sent via email. Awareness was higher amongst existing DQ customers, about half of whom were aware of the new types of services available, rising to 6 in 10 frequent users.
- 6.11 Overall, 16% of consumers were aware of the range of additional services on DQ numbers (eg onward connection, classified searches etc) and had called one of the new 118 numbers. With this in mind, use of the new services by about 1 in 10 consumers indicates a fairly high conversion rate (just over 60%), and interest in the additional services once consumers become aware of them. Usage and interest was similar amongst existing DQ customers.
- 6.12 The most popular new services were having the number sent by text to a mobile phone (which is not a new service, but is more widely available now from a range of suppliers), onward connection to the requested number, cinema listings, and classified searches.
- 6.13 Interest in using the additional services (figure 6b) was fairly high at 42%, given the fairly low awareness and therefore appreciation of these new services. Onward connection, classified searches, and neighbours’ numbers elicited most interest.
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Figure 6b: Use of and interest in using range of new DQ services
 Base: GB adults aware of the DQ changes, Oct 03 (Base: 956)



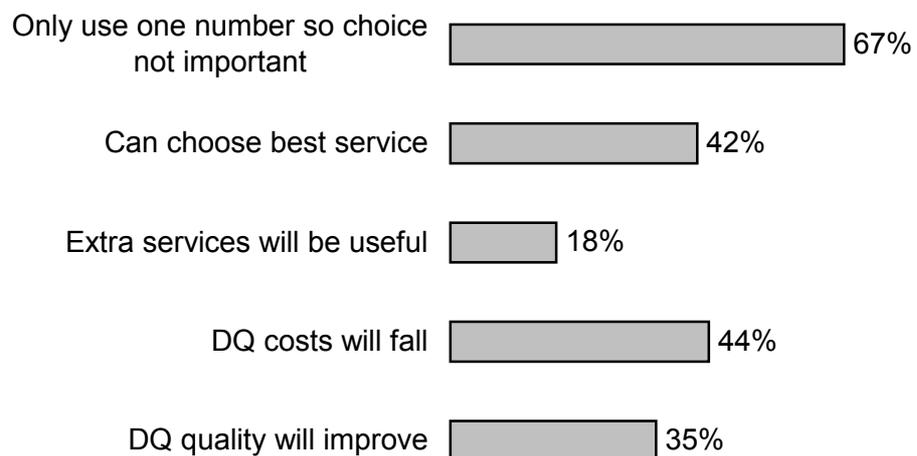
General opinion on liberalisation

- 6.14 Impressions about the DQ market liberalisation appear varied at first glance, with 1 in 5 confident that the additional services will be of use to them, mixed views about the impact on costs and quality, and two-thirds claiming they'll only use one number hence choice isn't important to them. In the context of the other findings the message is quite consistent however.
- 6.15 Awareness and use to date of the additional services is fairly low, unsurprising as the key marketing message since the launch of the new numbers has focused on awareness of the change and number recognition. This makes it difficult for consumers to appreciate their potential benefit as yet.
- 6.16 In terms of choice, most said they'd tend only to use one supplier, but usage figures indicate that this usage isn't predominantly one supplier indicating the importance of choice at an overall (rather than individual) level. So whilst at an individual level consumers don't feel they want a choice, at the overall level, usage indicates that

the choices are being used therefore enabling individuals to select the service that best suits their needs.

Figure 6c: General opinions on DQ liberalisation

Base: GB adults aware of the DQ changes, Oct 03 (Base: 1067)



Annex A**List of suppliers included in the mystery shopping evaluation**

	DQ number	DQ provider
Selected national DQ numbers		
1	118 429	118 GAY
2	118 119	192.com
3	118 500	BT
4	118 707	BT
5	118 404	BT (Welsh service)
6	118 511	British Gas
7	118 099	C&W
8	11 88 88	Conduit
9	11 88 88	Conduit (Welsh service)
10	118 800	Directory Enquiries UK
11	118 453	Freedom discovery – Gay and lesbian DQ service
12	118 811	One (INFONXX UK limited)
13	118 118	The Number UK Ltd (INFONXX UK limited)
14	118 288	Kingston communications
15	118 212	Maureen (Independent radio news)
16	11 878	NTL
17	118 895	NTL
18	118 111	One.tel (Centrica)
19	118 114	Opal Telecom (Yahoo)
20	118 000	Orange
21	118 499	Share Charity
22	118 080	Simunix
23	118 877	Telco Global Communications
24	11 88 66	Telegate limited
25	118 180	Telewest
26	118 770	Telewest
27	118 321	Tesco
28	118 355	Thus
29	118 747	UK Directory Assistance
30	118 247	Yell Ltd
Selected international DQ numbers		
1	118 505	BT
2	118 449	Cable and Wireless
3	11 88 99	Conduit
4	118 003	NTL
5	118 211	One.tel
6	118 880	Orange
7	118 840	Telco Global communications
8	11 88 66	Telegate
9	118 190	Telewest
10	118 486	Thus

Annex B

Mystery Shopping Methodology

The majority of calls were made from MORI's central telephone centre in Scotland. Calls were either made from landlines, or in the case of testing text-back services, from mobiles. Where limited network availability precluded the possibility of using the Scottish centre, calls were made from residential numbers subscribing to the appropriate network. In addition, where directory enquiries were requested in the Welsh language, a Welsh speaker was used.

To attempt to reflect the approximate spread of calls received by directory enquiry call handlers, calls were made to DQ operators throughout the day and at weekends. The times were as follows:

- Daytime (9am – 5pm) c38%
- Evening (5pm – 10pm) c31%
- Late Night (10pm – midnight) c2%
- Weekends (10am – 6pm) c28%

All calls were conducted in accordance with the guidelines outlined by the Market Research Society and ESOMAR. Callers did not reveal their identity either during the call or at the end to ensure the continued objectivity of the whole research project. DQ providers were aware that Ofcom and ICSTIS were conducting a mystery shopping programme, but were not aware of the precise timing and details in order to protect the study's objectivity.

Calls were initially recorded on a simple, easy to use paper script which allowed flexibility in recording data, and the order in which questions during the call were posed and answered. During the call, all time information was recorded using digital clocks and measured to the nearest second. Data recorded during these calls were then transferred on to a CATI (Computer Aided Telephone Interviewing) system from which subsequent analysis was run.

Requests were only made where the service was advertised as available. The scenarios used in the study were:

- **Business:** requesting the telephone number of a UK business, giving the business name and address. A range of businesses spread across the country was requested
 - **Residential:** the telephone number of a UK resident, giving the full name and address. A geographic spread of numbers was requested
 - **Ex-directory:** the telephone number of a number known to be ex-directory was requested, giving the full name and address, to explore whether or not operators gave out the number or told the caller it was ex-directory or not listed
-

- **Call Connect:** requesting either a residential or UK business number, giving full information and requesting that, after receipt of the telephone number, the caller be put straight through to it. Asking the cost of this service if not given spontaneously.
- **Text Back:** calling from a mobile phone and requesting a residential or UK business number giving full information, receiving the telephone number both verbally and via SMS. If not offered to be sent the number by SMS spontaneously, asking for this to be done
- **Cinema Listing:** asking for information regarding the screenings and timings of films giving the name and location of a specific cinema
- **Classifieds:** asking for the telephone number of a particular trade or business type within a certain postcode area without giving a business name or address.
- **International:** requesting the telephone number of a non-UK business or residential address. Giving the full name and address. Numbers in Europe and more distant countries were requested. Availability of international numbers from each DQ operator is variable, dependent on the resources they have available.
- **Complaint:** If during the call, incorrect information/ telephone numbers were given, or a telephone number could not be supplied, note was taken that this call could possibly be used in a complaint scenario. Subsequently, complaints were lodged using the information recorded in the initial call, and the information recorded regarding the availability of refunds and the complaints procedures where applicable.

All numbers to be requested were checked for existence prior to fieldwork commencing. In the case of business requests, all numbers given by the DQ service which did not match the number (or numbers) expected to be given for that business were checked (by calling them) to ascertain whether or not they were suitable alternatives.

Annex C

Consumer survey questionnaire

Base: ASK ALL ADULTS

Q1. How often do you phone any directory enquiry service from either a mobile or fixed phone?

SHOWCARD, SINGLE CODE

- Daily
- At least once a week
- At least once a month
- At least once a year
- Less frequently than once a year
- Never
- Don't know/no answer

Base: ASK ALL

Q2. New numbers for directory enquiry services have recently been introduced. Which of the following best describes whether you were aware of this before now?

READ OUT, SINGLE CODE

- I was aware that new numbers were being introduced but was not aware that they were already available
- I was aware that new numbers had already been introduced
- I was not aware that new numbers had been introduced
- Don't know/No Answer

Base: ALL AWARE OF NEW NUMBERS

Q3. Which of the new directory enquiry numbers can you recall?

Base: ALL AWARE OF NEW NUMBERS

FOR ALL NUMBERS NOT RECALLED AT Q3 ASK:

Q4. Which of the following new directory enquiry numbers do you recognise?

SHOWCARD, MULTICODE

- 118 000
 - 118 111
 - 118 118
 - 118 119
 - 118 141
 - 118 180
 - 118 192
 - 118 247
 - 118 404
 - 118 429
-

118 500
118 505
118 622
118 800
118 811
11 878
11 88 66
11 88 88

Base: ALL AWARE OF NEW NUMBERS

Q5. Since the introduction of the new directory enquiry numbers, are you now calling directory enquiries more frequently, less frequently or about the same amount as you did before the old directory enquiry number was withdrawn?

READ OUT IF NECESSARY, SINGLE CODE

More frequently
About the same
Less frequently
Too early to say
Don't know

Base: ALL CALLING DQ MORE FREQUENTLY OR LESS FREQUENTLY AT Q5

Q6. Why do you now call directory enquiries [MORE/LESS] frequently than you used to?

Base: ALL WHO NOW CALL LESS FREQUENTLY AT Q5

Q7. Where do you now look for telephone numbers instead of calling directory enquiries?

Base: ALL AWARE OF NEW NUMBERS

Q8. Approximately how much did it cost to call the old 192 directory enquiries number from a fixed line phone?

Base: ALL AWARE OF NEW NUMBERS

Q9. Which of these statements best describes your understanding of the costs of the new directory enquires numbers?

All the new numbers charge the same price as each other
The new numbers charge a range of different prices

Base: ALL MENTIONING AT LEAST ONE SPECIFIC NUMBER AT Q4

Q10. Which, if any, new numbers have you called?

SHOW CARD IF NECESSARY, MULTICODE

118 000
118 111
118 118
118 119
118 141

118 180
118 247
118 404
118 429
118 500
118 505
118 800
118 811
11 878
11 88 66
11 88 88
Other number beginning with 118 (SPECIFY)
Other (non 118) number
Can't remember which number called
Can't remember whether have called one of the new numbers
Have not yet called one of the new numbers

Base: ALL WHO CAN RECALL NUMBER USED

Q11. Why did you decide to use that/these particular number/s?

BASE: ALL AWARE OF NEW NUMBERS

Q12. Many of the new directory enquiry providers offer extra services in addition to simply giving you the number you request. Please can you tell me whether or not you have heard of each of the services listed on this card?

SHOW CARD CODE 'YES' OR 'NO' FOR EACH SERVICE

Number sent by text to your mobile
Number e-mailed to you
Onward connection to the number requested
Searches for specific services such as a taxi firm or electrician
Cinema listings
Television listings
Number of a neighbour of someone you know
Number of someone living at the same address as the person you want to call
Providers listing specialist gay services
Welsh language services

FOR EACH SERVICE AWARE OF AT Q12, PLUS STANDARD DIRECTORY ENQUIRIES, ASK:

Q13. Please can you tell me whether or not you have used each of these services?
SHOWCARD, CODE 'YES' OR 'NO' FOR EACH SERVICE

Standard directory enquiry: asking for a telephone number without any other service
Number sent by text to your mobile

Number e-mailed to you
Onward connection to the number requested
Searches for specific services such as a taxi firm or electrician
Cinema listings
Television listings
Number of a neighbour of someone you know
Number of someone living at the same address as the person you want to call
Providers listing specialist gay services
Welsh language services

FOR EACH SERVICE NOT USED (INCLUDING THOSE PREVIOUSLY UNAWARE OF AT Q12) ASK:

Q14. How likely do you think you are to use each of the following services in the future?
READ OUT

SCALE: Very likely, fairly likely, not very likely, not at all likely, don't know

Standard directory enquiry: asking for a telephone number without any other service
Number sent by text to your mobile
Number e-mailed to you
Onward connection to the number requested
Searches for specific services such as a taxi firm or electrician
Cinema listings
Television listings
Number of a neighbour of someone you know
Number of someone living at the same address as the person you want to call
Providers listing specialist gay services
Welsh language services

BASE: ALL AWARE OF INTRODUCTION OF NEW NUMBERS

Q15. I shall now read out some statements about the introduction of the new 118 directory enquiry numbers. Please can you tell me to what extent do you agree or disagree with the following statements?

SHOWCARD: agree a lot / agree a little / disagree a little / disagree a lot / DK (NOT ON SHOWCARD)

Having different directory enquiry providers available means I can choose the best service for my needs

The extra services offered by some of the new directory enquiries providers are, or will be, really useful to me

I (will) only call one number for directory enquiries, so having a wide choice of numbers and services is not important to me

Competition between the different directory enquiry services will lead to an improvement in the quality of the services they provide

Competition between the different directory enquiry services will lead to the costs of these services coming down

Base: ALL WHO EVER CALL DIRECTORY ENQUIRIES AND ARE UNAWARE OF INTRODUCTION OF NEW NUMBERS AT Q2

Q16. The national 192 and international 193 directory enquiry numbers were withdrawn from service at the end of August 2003. Where will you find out what the new directory enquiry numbers are?
