



Non-geographic numbers - research among service providers

Research Document

Publication date: 16 December 2011

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Section 1

Introduction and Background

1.1 Background and objectives

Ofcom is conducting a strategic review of non-geographic telephone numbers and commissioned research among businesses (Service Providers/SPs) offering services on 080 and 0845 numbers.

Ofcom's objective was to better understand SPs' use of 080 and 0845 numbers and the value that they place on their features, in order to inform our policy decisions for non-geographic number ranges.

The overall aims of the research were to provide an understanding of:

- SPs' preferences with respect to these numbers;
- SPs' likely reaction to Ofcom's proposed changes (including their propensity to migrate to another number range);
- Innovation - to understand if a different regime may allow them to offer new services or current services differently; and
- To explore how much SPs using 080 numbers would be willing to pay in order to secure free 080 calls from mobiles.

1.2 Method and sampling

623 telephone interviews were conducted between 30 September and 3 November 2011. Interviews were conducted among companies using 080 and 0845 numbers, with 304 interviews conducted among companies with 080 number/s and 319 interviews conducted among companies with 0845 number/s. Companies that had numbers in both ranges were asked questions only about the one they regarded as more important to their business. In addition, companies were asked to rate the importance of the number range and were only asked questions about a particular number range if it was regarded of equal or more important than other number ranges used by the business.

The sample was sourced from the Dun and Bradstreet business database. All respondents were screened to ensure they had responsibility for decision-making regarding their company's use of telephone numbers. We categorised companies into two broad groups based on the industry sector in which they operate: "Socially Significant" and "Others". The definition of Socially Significant sectors used in this research is provided in Annex 1.

Quotas were set to ensure robust sample sizes for company size and industry sector (i.e. Socially Significant and Others). Data was weighted at the analysis stage by company size band and industry sector (Socially Significant and Others) to be representative of all companies with each number range.

Section 2

Executive Summary

2.1 SPs using 080 numbers

- Four in five (81%) of SPs using 080 numbers were aware of the current retail charging arrangements for 080 callers.
- Overall, all of the six main features (in terms of charging arrangements or the brand image) of a Freephone number which we asked about were seen as important by more than half of users. Of particular importance were:
 - offering free calls from fixed lines;
 - the brand image it conveys; and
 - how much the organisation has to pay to receive each call.
- We explored 080 SPs' reactions to higher costs for operating their 080 number in return for all calls being free to the caller. There were no clear differences in preferences based on size or industry sector (Socially Significant and Others).
- Just under half of respondents (47%) were concerned that charges to mobile callers was a disadvantage for their business in terms of reducing the number of calls they received. However, just over a third (36%) of these respondents expressed a willingness to pay more to ensure freephone was free-to-caller on mobiles (equating to 17% of all 080 SPs), with the average price increase being 2.9ppm.
- All 080 users were asked about their reaction to a potential price increase in order to make Freephone numbers completely free for all callers. For a 0.5ppm increase, 19% of respondents claimed that they were likely to get rid of their 080 number(s). This was the same proportion for a 1ppm increase. For a 1.5ppm and 2ppm increase, the proportion of respondents that claimed they were likely to get rid of their 080 number(s) went up to 28% and 36% respectively.
- We also explored respondents' relative preferences for making 080 free to callers, albeit at a cost to the SP, compared to a fixed non-zero cap on the price of 080 mobile calls (at 7ppm) with no increased cost to the SP. At a price point between 1ppm and 1.5ppm, the proportion of respondents that wanted 080 to be free to caller was outweighed by those that preferred the capped option.

2.2 SPs using 0845 numbers

- There was some confusion over exactly how callers are charged for these numbers.
- Most of the five features (in terms of charging arrangements and branding) that we asked about were seen as important, especially that callers are charged the same as for a call to a normal landline. Being able to advertise the exact price of calls was not as important.

- Of the 2 options for how the system for calls to 0845 numbers could be altered, the most popular option was for the organisation's cost to increase by 1.5ppm and the cost to all callers to be the same as for a normal landline call. Less than a third would prefer to keep costs the same but advertise the revenue split.
- Around half of respondents said they would get rid of their 0845 number if the option they did not prefer was introduced. Overall there was relatively high stated likelihood of following through with their intention.

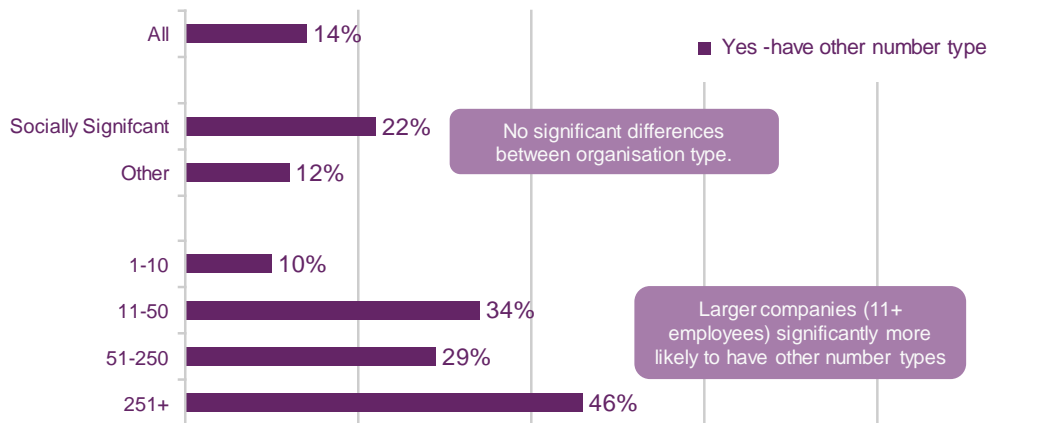
Section 3

080 number range

3.1 Background

Respondents were asked whether their organisation used any other non-geographic telephone number ranges. Most (86%) service providers with an 080 Freephone number did not use another number range. Companies of more than 10 employees were more likely to use other type of number ranges than those with fewer than 10 employees.

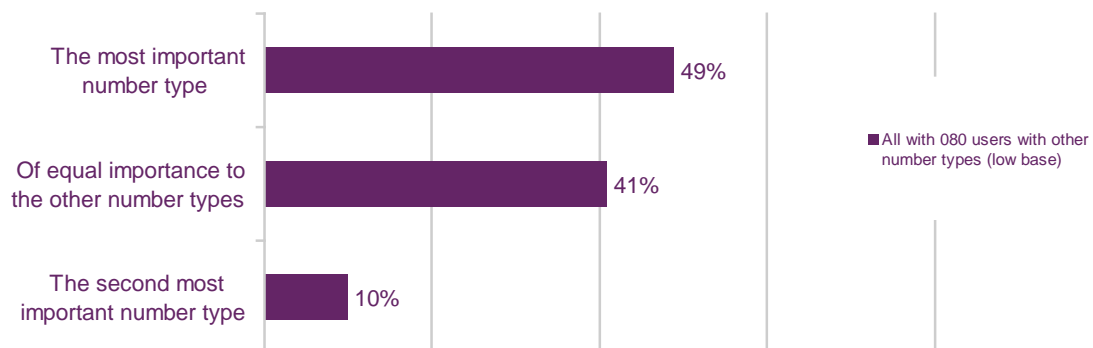
Figure 1: Proportion of service providers that have another (non 080) number



Source: Q.8 Do you also have other telephone numbers, starting with anything other than 080, for example 0845, 0871 or 09?
 Base: All 080 respondents (304)

As mentioned above, respondents whose company had numbers in more than one number range were asked to rate the importance of the number range and were only asked questions about a particular number range if it was regarded of equal or more important than other number ranges within the business. The figure below shows how this broke down among the 080 number users who completed the interview. Among those with another number range, just under half (49%) felt that their Freephone number was the most important to their business.

Figure 2: Importance of 080 number/s compared to other number ranges used



Source: Q.9 Thinking about the different types of telephone number your organisation uses, overall is the Freephone 080 number..
 Base: All 080 with other number types (74) – caution, small base

To assess awareness of the current 080 regime respondents were asked the following question:

“As you may know, currently calls to 080 Freephone numbers are almost always free to callers from landlines, but are rarely completely free to callers from mobile phones. Mobile callers usually pay between 7 and 40 pence per minute.

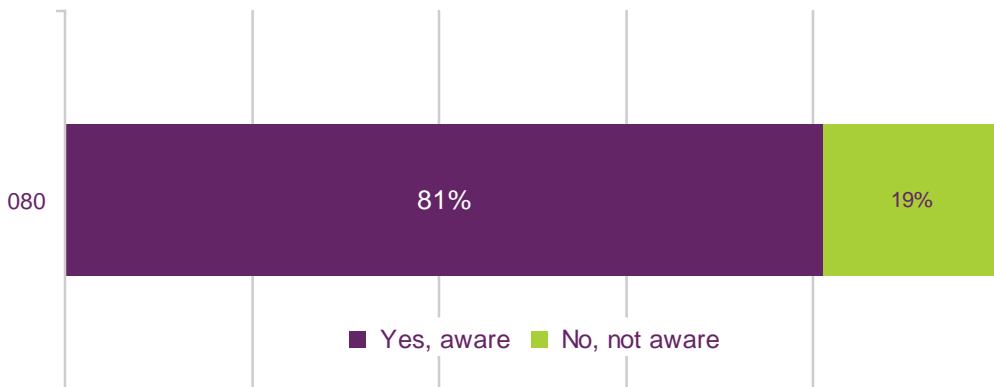
When someone calls a Freephone number with a mobile phone a recorded message tells them that they will be charged, but not how much.

Your organisation will pay a charge whenever someone calls your Freephone number.

Before today, were you aware of this?”

Overall, four in five (81%) SPs were aware of the current arrangements facing callers to their 080 number.

Figure 3: Awareness of Freephone arrangements for callers



Source: Q.10 As you may know, currently calls to 080 freephone numbers are almost always free to callers from landlines, but are rarely completely free to callers from mobile phones. Mobile callers usually pay between 7 and 40 pence per minute. When someone calls a freephone number with a mobile phone a recorded message tells them that they will be charged, but not how much. Your organisation will pay a charge whenever someone calls your freephone number. Before today, were you aware of this?
Base: All 080 respondents (304)

3.2 080 number range - usage and value

Respondents were given a list of five features of 080 numbers and were asked to rate their importance.

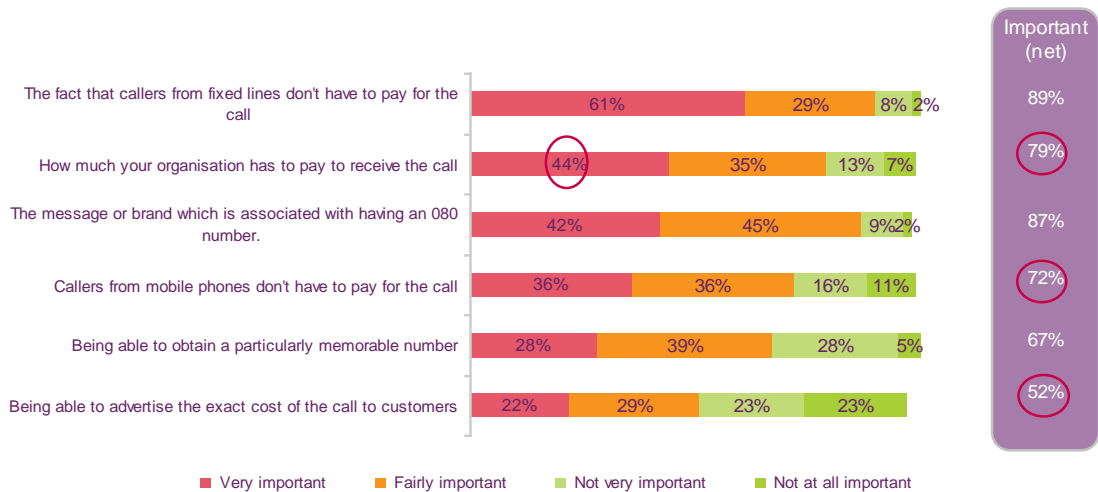
Free calls from fixed line phones was seen as the most important feature of an 080 number, with 61% rating it ‘very’ important and a further 29% ‘fairly’ important. This was significantly more important for companies with less than 50 employees than those with over 50 employees (1-10 employees, 91%; 11-50 employees, 85%; 51-250 employees, 78% and 251+ employees, 66%).

‘How much your organisation has to pay to receive the call’ and ‘the message or brand which is associated with having a 080 number’ were seen as very important by more than 2 in 5 respondents (44% and 42% respectively).

'Free calls from mobile phones' was regarded as very important for 36% of respondents, and was more important for Socially Significant organisations than Other organisations (55% vs 32% respectively rating it as 'very important').

Being able to obtain a memorable number was very important for just under a third of organisations. Being able to advertise the exact cost of the call to customers was seen as very important by just a fifth (22%) of respondents. More Socially Significant companies rated it as 'very important' than Other companies (34% vs 20%).

Figure 4: Importance of Freephone number features

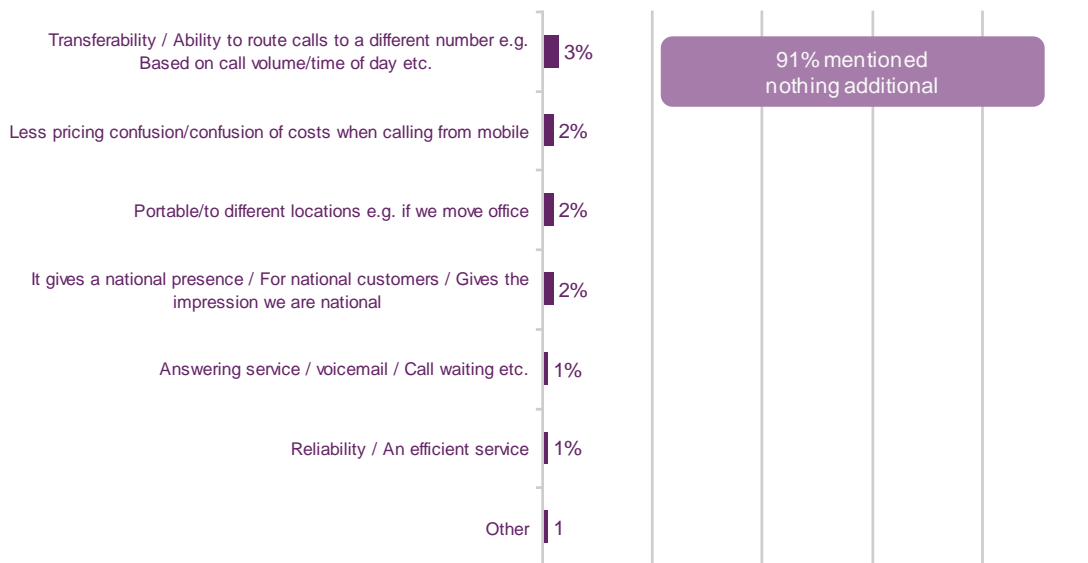


Source: Q.11 How important it is to your organisation that 080 numbers have the following features
Base: All 080 respondents (304)

○ =Significantly lower than figure above it

There were very few additional Freephone features spontaneously mentioned as important: 91% of respondents mentioned nothing additional.

Figure 5: Additional Freephone number features spontaneously mentioned as important



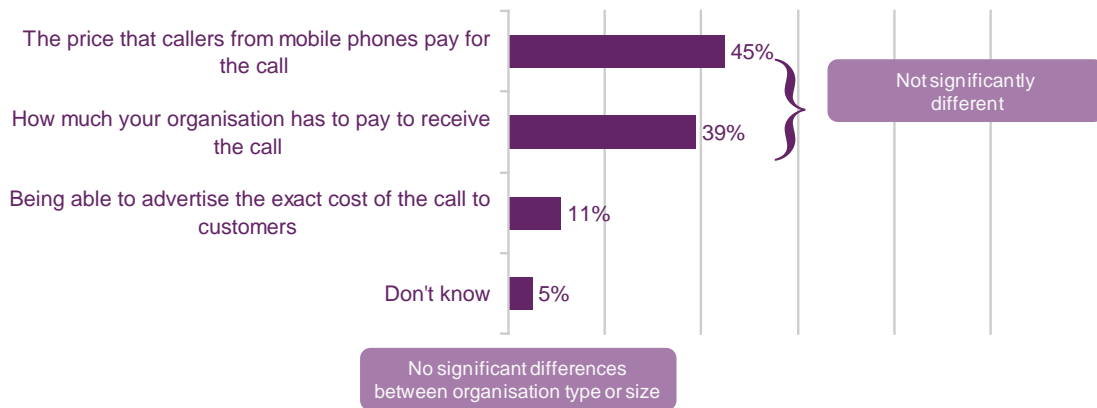
Source: Q.12 What other features are important to you that I've not already mentioned?
Base: All 080 respondents (304)

3.3 Charging mobile callers

Respondents were asked if they could change only one of three aspects of 080 numbers, which would it be. The three aspects that they had to pick between were the price paid by callers from mobile phones, the amount their organisation has to pay to receive calls and the ability to advertise the exact the exact cost of the call to customers.

The figure below shows there was no clear preference on potential changes to charges, with an even split between changing the price that callers from mobile phones pay for the call (45%) and how much the organisation pays to receive the call (39%).

Figure 6: Which aspect of 080 numbers would you prefer to change

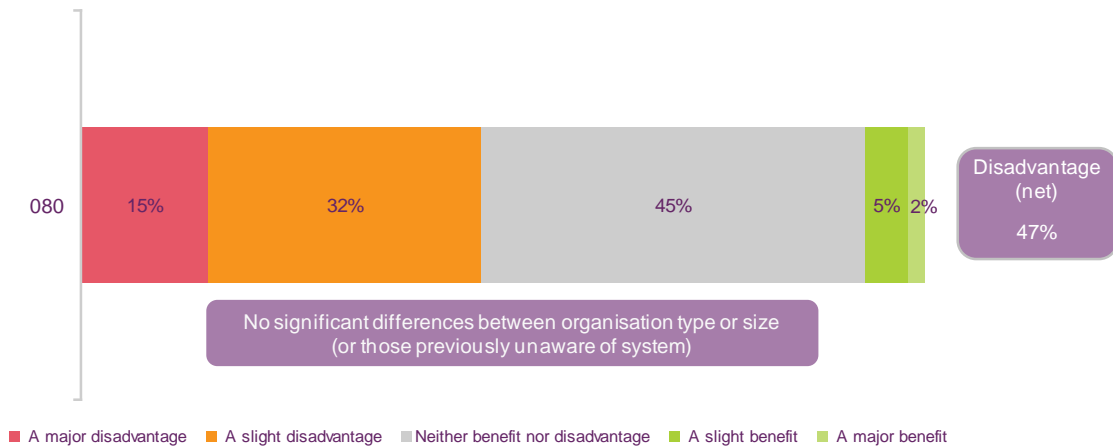


Source: Q.13 If you could change only one of the following aspects of 080 numbers, which one would it be?
 Base: All 080 respondents (304)

Respondents were then asked how they feel about the impact of mobile charges for calls to their Freephone number on the total number of calls that they receive: whether it is a disadvantage or benefit to their business.

Just under half (47%) of the 080 SPs that we surveyed said that charging mobile customers for making a 080 call to their business was a disadvantage to their business in terms of the impact on the number of calls they received. A further 45% said it had no impact on their business and 7% said it was a benefit.

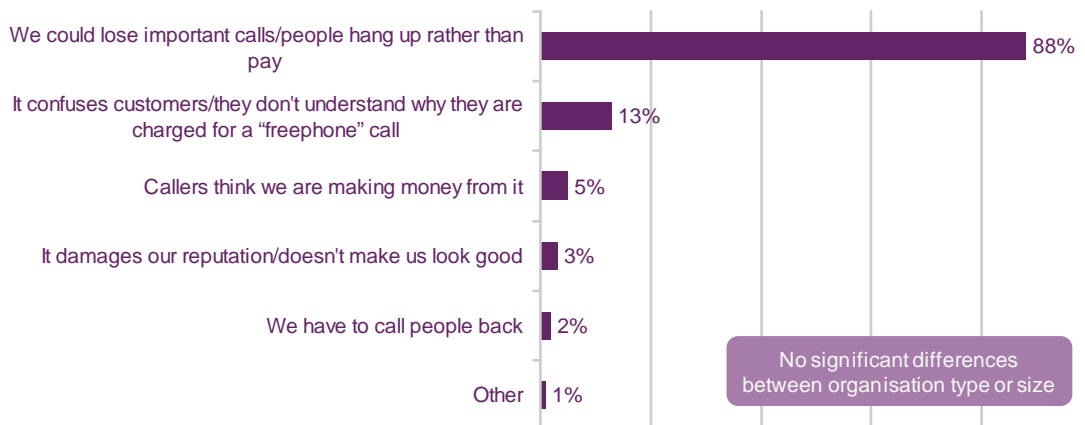
Figure 7: Perception of impact of mobile charges on the total number of calls received



Source: Q.14 As mentioned, mobile phone companies typically charge the caller between 7 and 40 pence per minute to call 080 freephone numbers. Callers are told they will be charged, but not how much that charge is. Callers can avoid this by calling from a landline. How do you feel about the impact of these mobile charges on the total number of calls that you receive?
 Base: All 080 respondents (304)

Those who said charging mobile customers for calling their Freephone number was a disadvantage were asked why. Businesses said that the biggest disadvantage of charging mobile consumers to call Freephone numbers was losing calls (88%).

Figure 8: Why do you think it is a disadvantage?



Source: Q.15 And why do you believe it is a disadvantage?
 Base: All 080 that stated "disadvantage" at Q.14 (145)

3.4 Willingness to pay so mobile callers are not charged

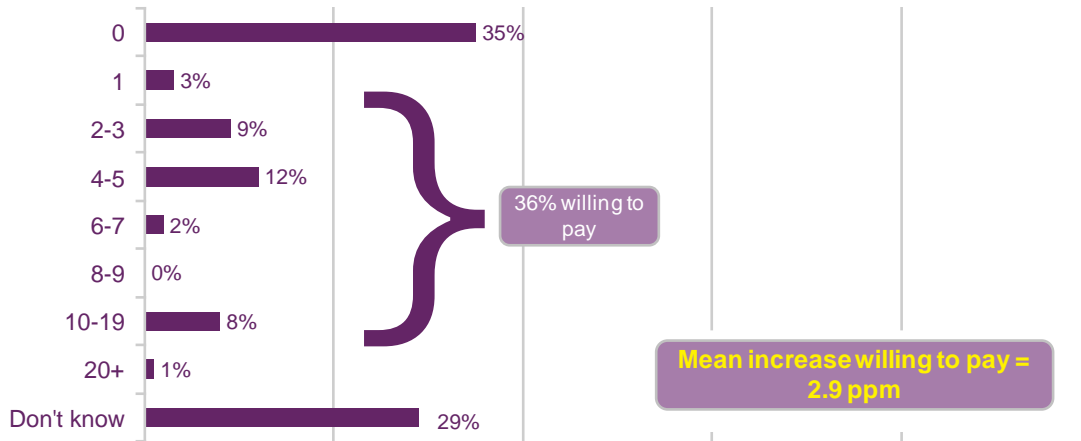
Those who said it was a disadvantage that mobile callers had to pay to call a Freephone number were asked:

"by how much would you be willing to increase the pence-per-minute amount that you pay to receive calls on your Freephone number(s) in return for the charge to mobile callers being reduced to zero?"

The figure below shows that despite feeling it to be a disadvantage to their business, just over a third (35%) were unwilling to pay anything more for mobile customers to get free

Freephone calls. Another third (36%) were willing to pay, with the average increase being 2.9ppm.

Figure 9: How much organisations who say they are disadvantaged are willing to increase the pence per minute (ppm) amount they pay in return for mobile callers paying zero

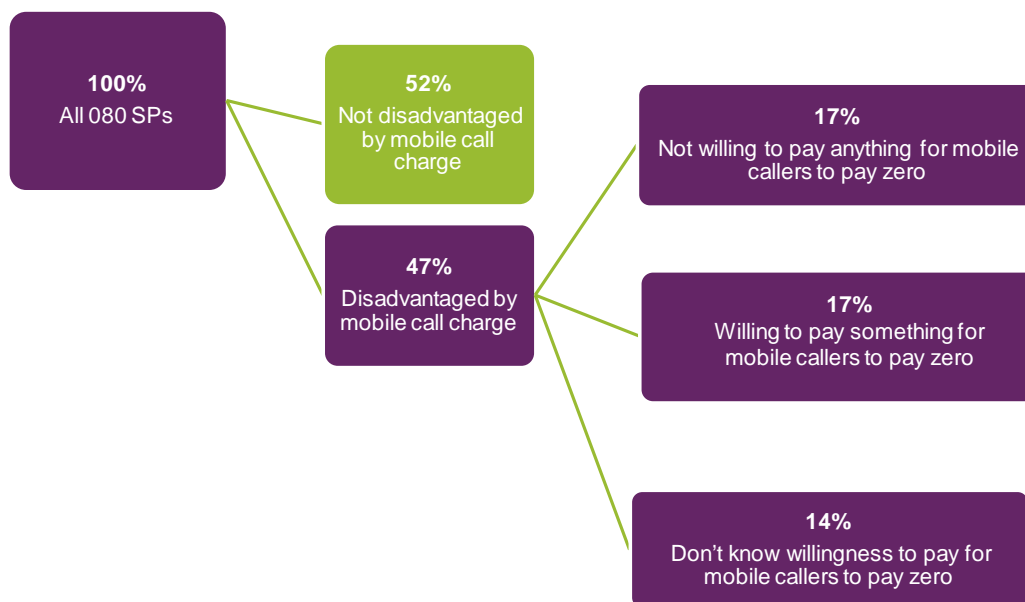


Source: Q.16 By how much would you be willing to increase the pence-per-minute amount that you pay to receive calls
 Base: All 080 that stated "disadvantage" at Q.14 (145)

Figure 10, below, demonstrates willingness to pay for mobile callers to pay zero cost for a 080 number among all 080 SPs.¹ Overall, an equal proportion of 080 SP's said they were not willing and were willing to pay something for mobile callers not to be charged for calling an 080 number (17% each).

¹ Note that the various categories in Figure 10 do not exactly add up to 100% because we have not depicted respondents that said "don't know" to Q14 (1% of respondents) and because the responses to Q16 have been rounded to the nearest percentage point.

Figure 10: Willingness of all 080 SPs to increase the pence per minute (ppm) amount they pay in return for mobile callers paying zero



Source: Q.14 As mentioned, mobile phone companies typically charge the caller between 7 and 40 pence per minute to call 080 freephone numbers. Callers are told they will be charged, but not how much that charge is. Callers can avoid this by calling from a landline. How do you feel about the impact of these mobile charges on the total number of calls that you receive? and Q16 By how much would you be willing to increase the pence-per-minute amount that you pay to receive calls?
Base: All 080 respondents (304)

In order to explore whether and by how much companies would be willing to increase the cost per minute to them of receiving calls that were completed free to all callers, all respondents were asked the following question:

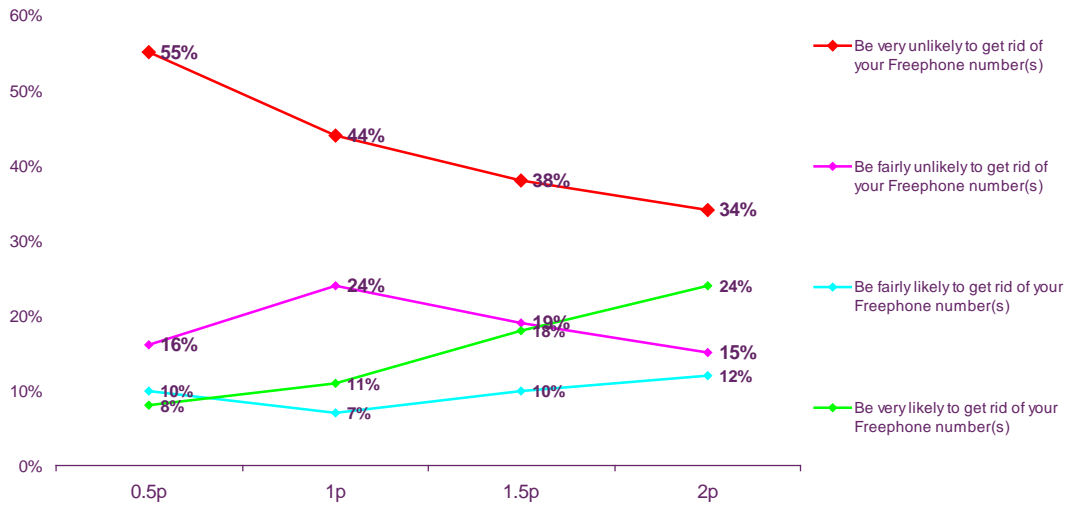
“If your Freephone number(s) were made completely free to all callers and the amount you currently pay per minute for those calls was increased, how likely would you be to get rid of your Freephone number(s)?

Firstly if the cost per minute to you was increased by [READ OUT FIRST PRICE] would you say you would...”

Four price increases were explored: 0.5p, 1p, 1.5p and 2p.

Figure 10, below, demonstrates how likely SPs are to get rid of their 080 numbers in response to each of the four price increases. It shows a sharp rise in the likelihood of 080 numbers being dropping after an increase above 1ppm.

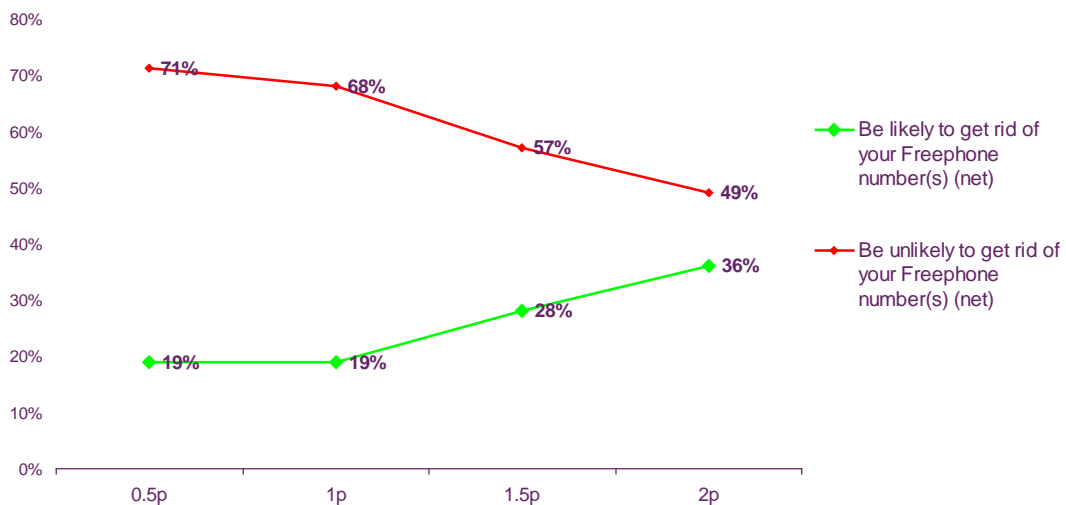
Figure 11: Likelihood of getting rid of Freephone number if cost per minute increases



Source: Q.17 If your freephone number(s) were made completely free to all callers and the amount you currently pay per minute for those calls was increased, how likely would you be to get rid of your freephone number(s) at each price increase?
 Base: All 080 asked about this price (304)

The rise in the number of SPs saying they will get rid of their 080 number if the cost increases by more than 1ppm is clearly demonstrated in the figure below, where ‘very’ and ‘fairly’ likely and ‘very’ and ‘fairly’ unlikely responses have been netted.

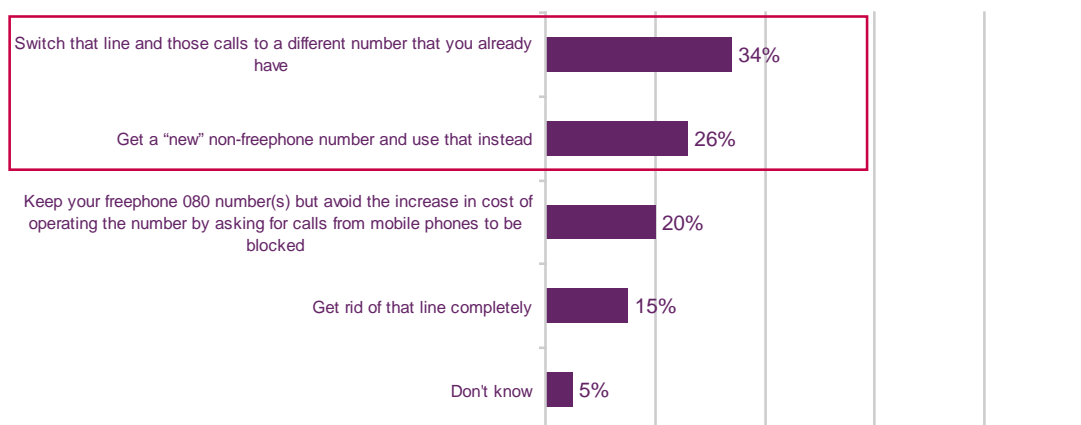
Figure 12: Likelihood of getting rid of Freephone number if cost per minute increases



Source: Q.17 If your freephone number(s) were made completely free to all callers and the amount you currently pay per minute for those calls was increased, how likely would you be to get rid of your freephone number(s) at each price increase?
 Base: All 080 asked about this price (304)

Respondents who said they would be likely (very or fairly) to get rid of their Freephone number if operating costs increased were asked what they would do instead of using their Freephone number. The majority (60%) said they would use a different line for those calls. A fifth (20%) said they would block mobile phones from being able to call the number and 15% said they would get rid of the line completely.

Figure 13: What organisation would do if got rid of Freephone line



Source: Q.18 If you did get rid of your freephone number, which of the following would you be most likely to do?
 Base: All very likely to get rid of Freephone number if operating cost increased at Q.17 (65) - **Caution: small base**

Respondents were then given another option to consider: making the Freephone number free to a mobile caller, but the organisation will pay more. vs capping the cost of the call to a mobile caller (at a maximum of 7ppm), and the cost to the organisation does not change. The following question was asked:

“Now considering another possible change.

Firstly: The cost to your organisation of operating your Freephone number stays the same as it is now, and the price of a mobile call falls to no more than 7 pence per minute.

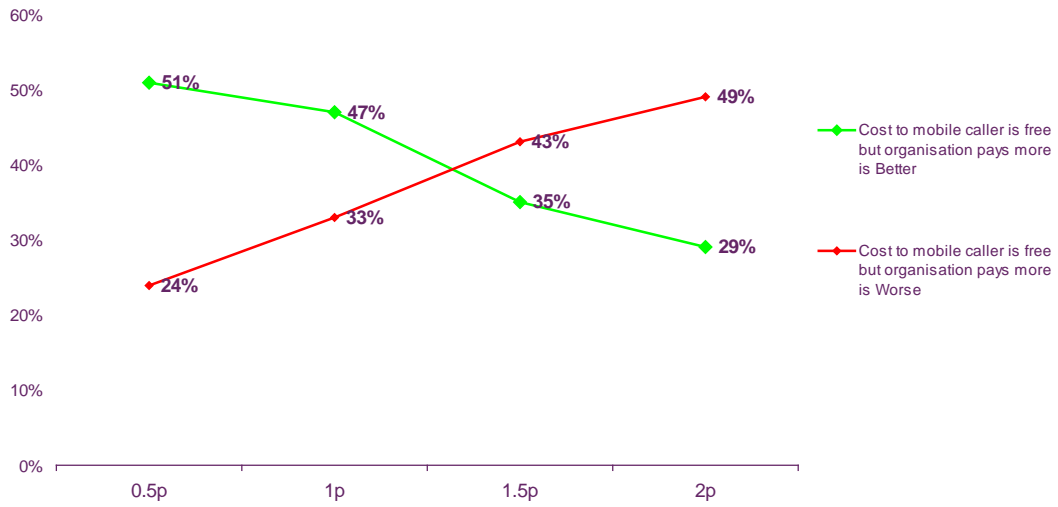
Secondly: The cost to your organisation of operating your Freephone number increases, but the price of the mobile call is free to the caller.

So if the cost to the mobile caller was free, but the cost to you increased by READ OUT FIRST COST would that be better or worse for your organisation

IF NECESSARY: than if the cost to your organisation of operating your Freephone number stays the same as it is now (and the price of the mobile call falls to no more than 7 pence per minute).”

The figure below shows half (51%) of the 080 SPs that we surveyed feel it would be better for their organisation if calls from mobiles are free but the cost to the organisation increased by 0.5ppm. There is a minor drop off if the cost to the organisation increases to 1ppm (47% of organisations saying they would be better off). There is a significant drop-off in appeal past this price point, with just over a third (35%) of organisations saying they would be better off with an increase of 1.5ppm and 29% saying they would be better of with an increase of 2ppm.

Figure 14: At what ppm increase (to organisation) does the organisation prefer 'free-to-mobile caller' system



Source: Q.20 If the cost to the mobile caller was free, but the cost to you increased by...
Base: All 080 respondents (304)

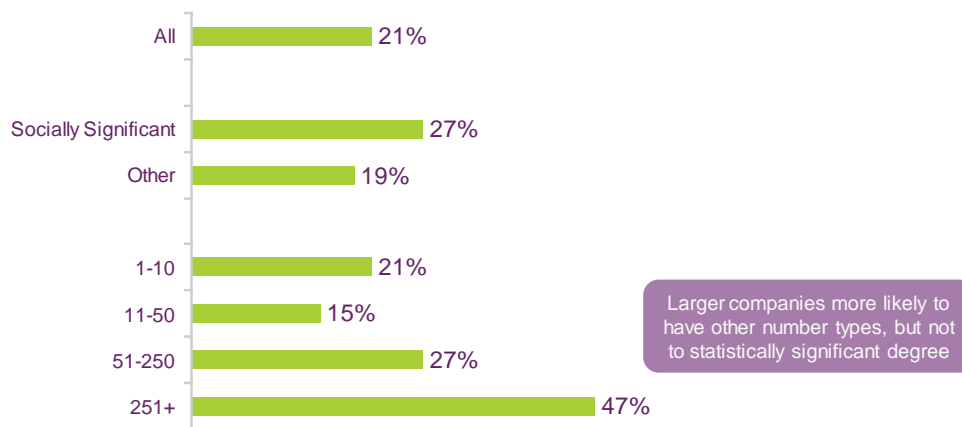
Section 4

0845 number range

4.1 Background

Respondents were asked whether their organisation used any non-geographic telephone numbers on any other number ranges. Just over one in five (21%) of companies with 0845 number/s also have numbers located on another number range.

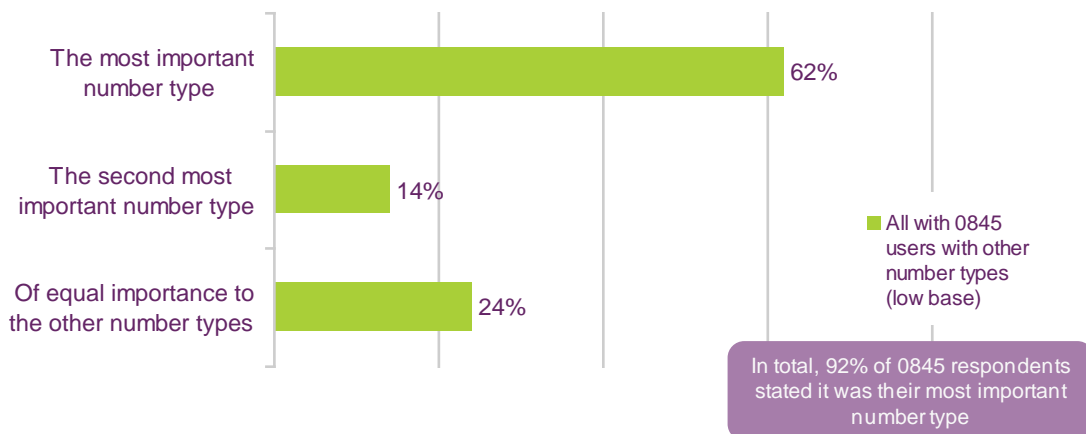
Figure 15: Proportion that have other (non 0845) number ranges



Source: Q.22 Do you also have other telephone numbers, starting with anything other than 0845, for example 0800, 0871 or 09?
Base: All 0845 (319)

As mentioned above, respondents whose company had numbers in more than one number range were asked to rate the importance of the number range and were only asked questions about a particular number range if it was regarded of equal or more important than other number ranges within the business. The figure below shows how this broke down among the 0845 number users who completed the interview. Two fifths of those that did have another number on a different number range felt that their 0845 number was the most important.

Figure 16: How important is respondent's 0845 number compared to their other numbers

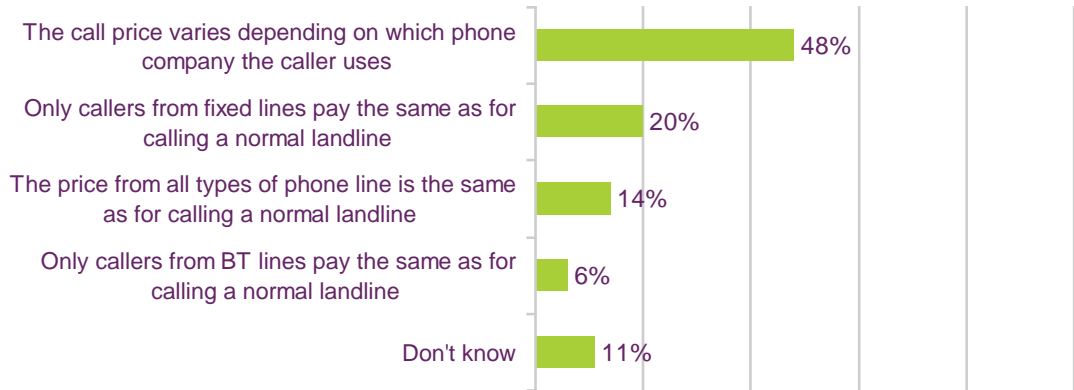


Source: Q.23 Thinking about the different types of telephone number your organisation uses, overall is/are the 0845 number(s).
Base: All 0845 with other number types (84)

Respondents were read various statements and asked which they believed was the most accurate statement about the price paid by callers to their 0845 number.

The figure below demonstrates there was some confusion over exactly how much callers pay to call 0845 numbers.

Figure 17: How much does a caller pay when calling your 0845 number(s)?



Source: Q.26 Which of the following do you believe is the most accurate statement about the price paid by callers to your 0845 number(s)?
Base: All 0845 (319)

To assess 0845 SPs' awareness of the current 0845 regime, respondents were asked the following:

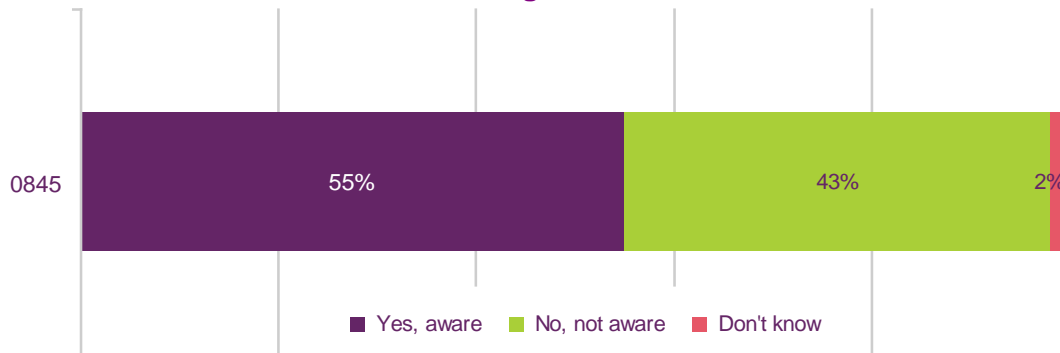
“As you may already know, the amount consumers pay for 0845 calls varies depending on which telephone company they use. Some fixed-line companies charge less for 0845 calls than for calls to normal landlines, whilst other fixed-line companies charge more. Generally mobile calls to 0845 numbers are outside bundles of 'free' minutes and are more expensive than mobile calls to normal landlines.

A portion of the call charge to your 0845 number(s) is passed on to your organisation. This is a relatively small element of the charge and you may not notice it as a source of income, but instead it might just be used to offset some of the overall costs you pay for operating the 0845 number(s).

Were you aware of this before today?”

The figure below shows just over half (55%) of respondents were aware of the current regime.

Figure 18: Awareness of current 0845 arrangements



Source: Q.27As you may already know, the amount consumers pay for 0845 calls varies depending on which telephone company they use. Some fixed-line companies charge less for 0845 calls than for calls to normal landlines, whilst other fixed-line companies charge more. Generally mobile calls to 0845 numbers are outside bundles of 'free' minutes and are more expensive than mobile calls to normal landlines.

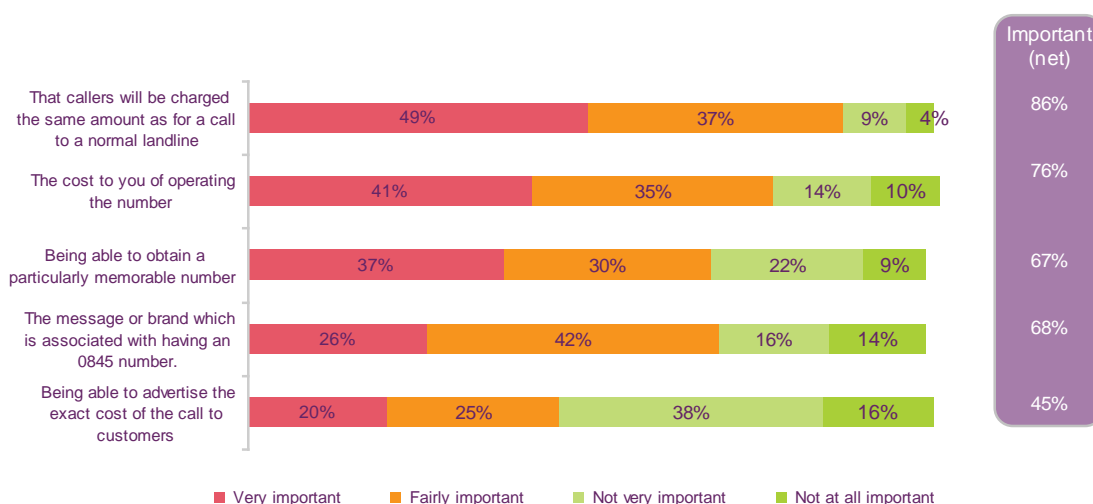
A portion of the call charge to your 0845 number(s) is passed on to your organisation. This is a relatively small element of the charge and you may not notice it as a source of income, but instead it might just be used to offset some of the overall costs you pay for operating the 0845 number(s). Were you aware of this before today? Base: All 0845 (319)

4.2 Usage and value of 0845 number range

Respondents were given a list of five features of 0845 numbers, and were asked to rate their importance.

The most important feature of the 0845 number range was 'that callers will be charged the same amount as for a call to a normal landline' (49% stating this was very important), this was followed by 'the cost to the organisation of operating the number' (41% very important) and being able to obtain a memorable number (37% very important). The image that having a 0845 number provides and being able to advertise the exact cost of the call to customers were seen as very important by 26% and 20% respectively.

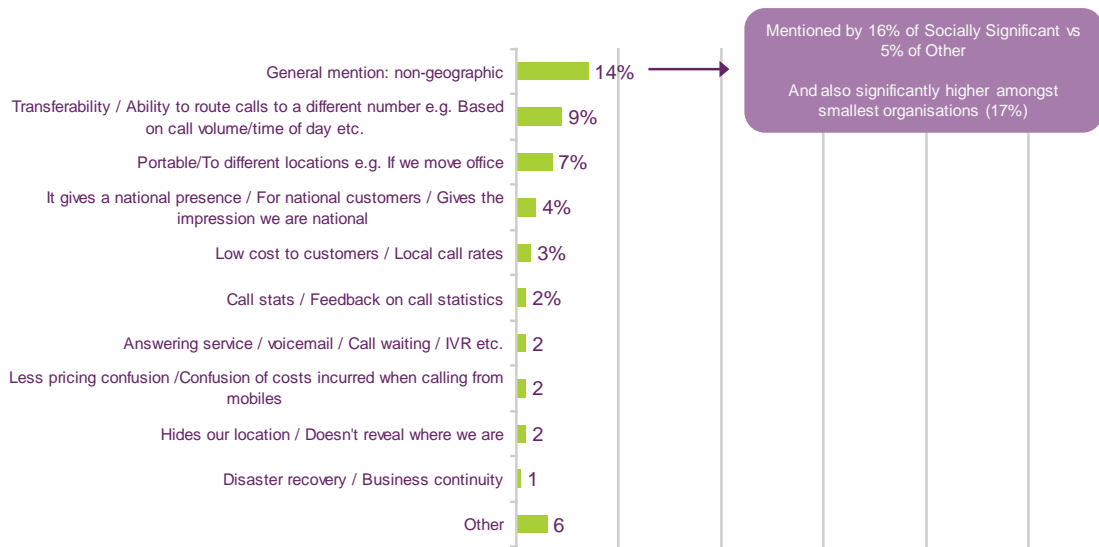
Figure 19: Importance of 0845 number range features



Source: Q.28 How important of not important it is to your organisation that 0845 numbers have the following features ... Base: All 0845 (319)

Respondents were asked if there were any other features about the 0845 number range that were important to their business. The fact that 0845 numbers are non-geographic was mentioned by 14% of respondents, and was higher among businesses in Socially Significant organisations compared to Other organisations (16% vs 5%).

Figure 20: Other 0845 features spontaneously mentioned by respondents



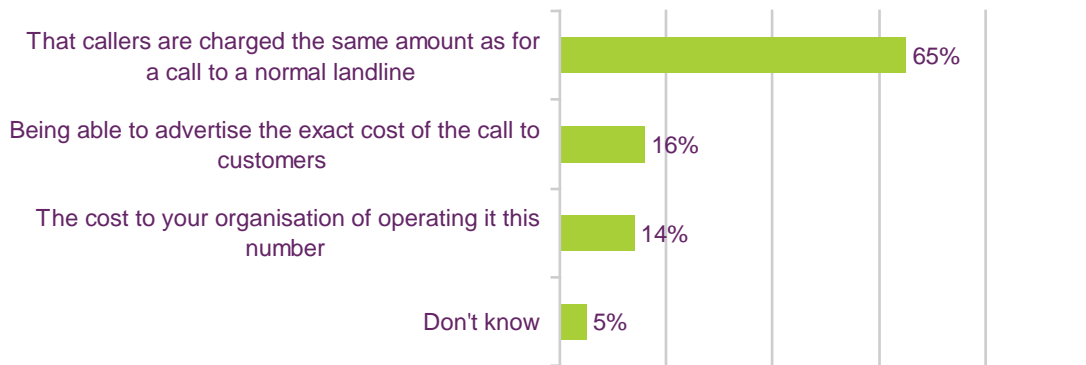
Source: Q.29 What other features are important to you that I've not already mentioned?
Base: All Respondents (319)

4.3 Reaction to potential changes

Respondents were asked which of three particular aspects of 0845 numbers they would change. The three aspects that they had to pick between were the price paid by callers being the same as a geographic call, the amount their organisation has to pay to receive calls and the ability to advertise the exact cost of the call to customers.

The most popular change was that callers are charged the same amount as for a call to a normal landline (65%).

Figure 21: Which of the following aspects of 0845 numbers would you change?



No significant differences for any option by organisation type or size

Source: Q.30 If you could change only one of the following aspects of 0845 numbers, which one would it be?
Base: All 0845 (319)

Respondents were then provided with two different options for how the system for calls to 0845 numbers could be altered. The following question was asked:

"I'm now going to describe two different options for how the system for calls to 0845 numbers could be altered.

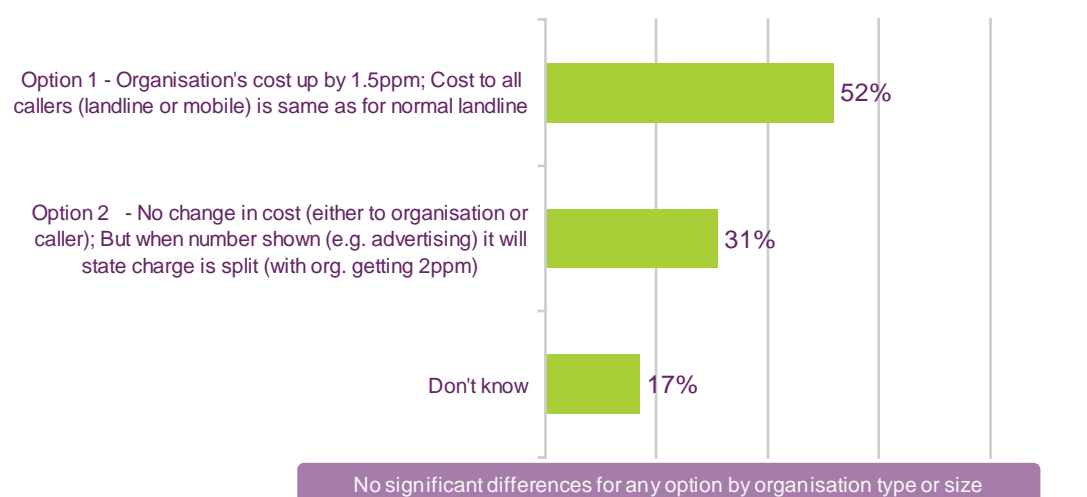
Option 1... the cost to you of operating an 0845 number will increase by 1.5 pence-per-minute, and the cost to callers of calling your 0845 number(s) will be the same as calls to a normal landline number.

Option 2.... neither the cost to your organisation of operating your 0845 number nor the price paid by callers will change, but when your number is mentioned, for example in advertising, it will state that the call charge is split, with 2 pence-per-minute going to you and the rest going to the phone company.

So would you prefer the Option 1 or Option 2?"

As figure 22, below, shows, the most popular option was for the organisation’s cost to increase by 1.5ppm plus the cost to all callers being the same as for a normal landline call, with just over half (52%) supporting this option. One in three (31%) preferred there to be no change in the cost of operating the number, but for the split in the revenue from the call to be advertised.

Figure 22: Preference for potential change to 0845 number charge

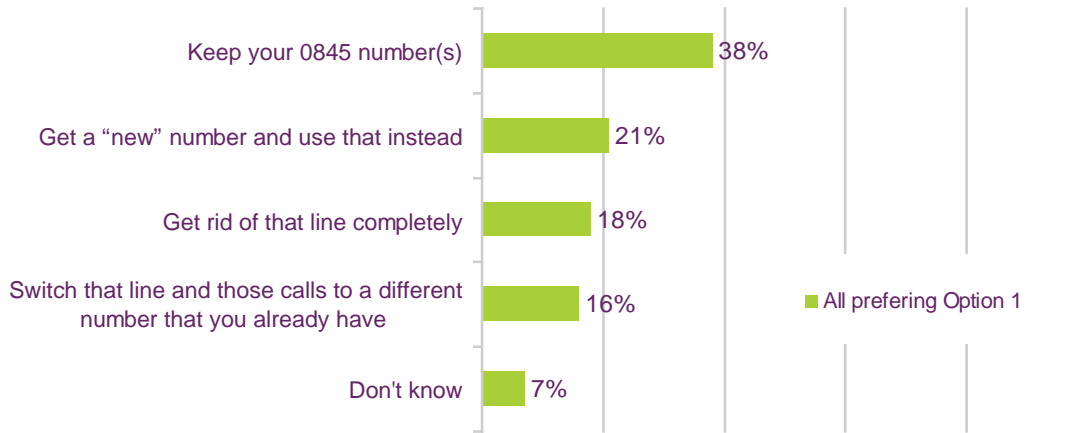


Source: Q.31 So would you prefer the first option or the second option?
Base: All 0845 (319)

Respondents who said they preferred Option 1 (the organisation’s cost increases by 1.5ppm and the cost to all callers is the same as for a normal landline) were asked what they would do if Option 2 (no change in cost, but advertising will state the revenue split) went ahead.

Just over a third (38%) that preferred Option 1 said they would keep their 0845 number if Option 2 was introduced. Over half said they would get rid of their 0845 number.

Figure 23: What would those preferring Option 1 do if Option 2 was introduced



Source: Q.32 Which of the following would you be most likely to do?
 Base: All prefer Option 1 - Organisation's cost up by 1.5ppm; Cost to all callers (landline or mobile) is same as for normal landline (159)

Overall there was relatively high stated likelihood of following through with their intention if Option 2 was introduced.

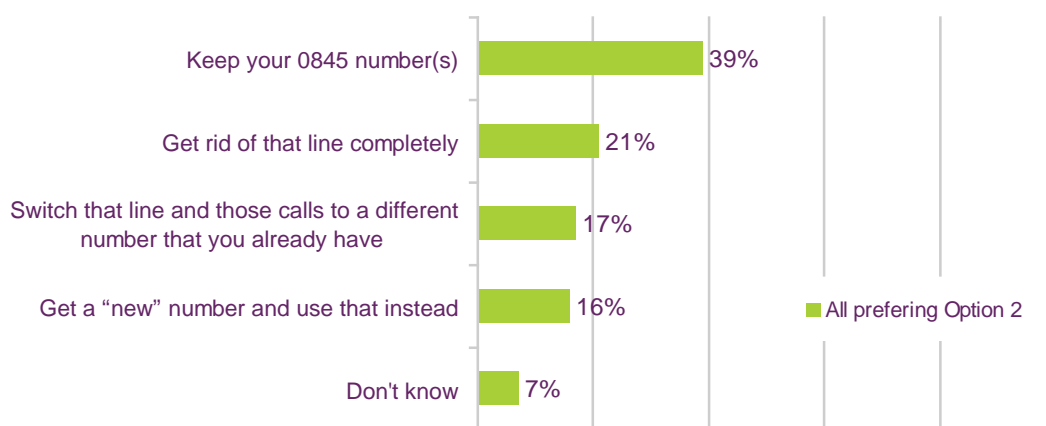
Figure 24: Likelihood of following through on stated intention if Option 2 was introduced



Source: Q.34 And how likely would you be to do that?
 Base: All 0845 selecting Option 1 (147) - **Note small individual bases for each (70/29//25/23)**

Those who preferred Option 2 were asked what they would do if Option 1 was introduced. Just under one in four (39%) said they would keep their 0845 number. Over half said they would get rid of their number completely.

Figure 25: What would those preferring Option 2 do if Option 1 was introduced



Source: Q.33 Which of the following would you be most likely to do?
 Base: All prefer Option 2 - No change in cost (either to organisation or caller); But when number shown (e.g. advertising) it will state charge is split (with org. getting 2ppm) (107)

Overall there was relatively high stated likelihood of following through with their intention if Option 1 were introduced.

Figure 26: Likelihood of following through on stated intention if Option 1 was introduced



Source: Q.34 And how likely would you be to do that?
 Base: All 0845 selecting Option 2 (99)

Annex 1

Definition of Socially Significant sectors

40.130 - Distribution & trade in electricity
40.210 - Mfr of gas
40.220 - Distribution & trade of gaseous fuels through mains
40.300 - Steam & hot water supply
64.200 - Telecommunications
65.121 - Banks
85.100 - Human health activities
85.111 - Public sector hospital activities, including NHS Trusts
85.113 - Medical nursing home activities
85.120 - Medical practice activities
85.130 - Dental practice activities
85.140 - Other human health activities
85.200 - Veterinary activities
85.300 - Social work activities
85.310 - Social work activities with accommodation
85.312 - Non-charitable social work activities with accommodation
85.320 - Social work activities without accommodation
85.322 - Non-charitable social work activities without accommodation
75.100 - Administration of the State and the economic and social policy of the community
75.110 - General (overall) public service activities
75.120 - Reg'n of act's of agencies for health care, education, cultural svce's
75.220 - Defence activities
75.230 - Justice & judicial activities
75.240 - Public security, law & order activities
75.250 - Fire service activities
75.300 - Compulsory social security activities
80.100 - Primary education
80.210 - General secondary education
80.220 - Technical & vocational secondary education
80.300 - Higher education
80.302 - First-degree level higher education
80.303 - Post-graduate level higher education
80.410 - Driving school activities
80.420 - Adult & other education nec
80.421 - Activities of private training providers
80.429 - Other adult & other education nec
90.010 - Collection & treatment of sewage
90.020 - Collection & treatment of other waste
90.030 - Sanitation, remediation & similar activities
85.311 - Charitable social work activities with accommodation
85.321 - Charitable social work activities without accommodation
52.310 - Dispensing chemists
64.110 - National post activities
65.122 - Building societies
74.110 - Legal activities
74.112 - Barristers at law
74.113 - Solicitors

74.119 - Other legal activities nec
91.110 - Activities of business & employers organisations
91.120 - Activities of professional organisations
91.200 - Activities of trade unions
91.310 - Activities of religious organisations
91.320 - Activities of political organisations
93.030 - Funeral & related activities

Annex 2

Questionnaire

Serial No: _____ (1-5)
Card: 01 (6-7)

Q1 Job number j11436: Ofcom NTS

29th September.

_____ (8-12)

SURVEY DETAILS:

Executive Name: Tim Barber

Field Dates: 30th September - 3 November 2011

Sample Source: Dun and Bradstreet Client: Ofcom

CONTACT:

Hello, my name is.... from BDRC Continental and I'm calling on behalf of Ofcom the telecoms regulator.

Could I speak to the person most responsible for making decisions about your organisation's usage of 0800 and/or 0845 telephone numbers? IF RECEPTIONIST/CALL HANDLER IS UNSURE WHO THIS IS, ASK FOR TELEPHONE NUMBER FOR HEAD OFFICE.

IF NO ONE AVAILABLE ARRANGE APPOINTMENT TO CALL BACK. RECORD THE DATE, TIME AND NAME OF THE RELEVANT PERSON TO SPEAK TO.

INTRODUCTION:

Hello, my name is and I'm calling from BDRC Continental, an independent market research company based in London. We are carrying out a survey for Ofcom (the telecoms regulator) amongst UK businesses and other organisations, looking at their usage of 0800, 0808 and 0845 telephone numbers and the costs involved.

The purpose of the survey is to ask organisations that have these numbers about proposed changes to them, and find out their preferred options. The results of this survey will help inform the decisions that Ofcom make.

May I ask you a few questions? IF NECESSARY The interview will take between 10-15 minutes.

Before I start the interview can I just check that you are one of the people in your company who knows about 0800, 0808 and/or 0845 telephone numbers that your organisation uses?

IF YES CONTINUE INTERVIEW. IF NO ASK TO SPEAK TO SOMEONE WHO DOES.

Q2 How much responsibility would you say you have in the decision about whether your company has or uses these types of number?

READ OUT IF NECESSARY

	(13)
I have sole responsibility.....	1
I have joint responsibility with one or other people	2
I have no responsibility.....	3
.....	Goto CLOSE
Don't know.....	4
.....	Goto CLOSE

Q3 Please can I take a note of your job title?

CODE TO SIMILAR OR TYPE IN

	(14)
Marketing/ Business Development/ Sales	1
Telecoms/IT	2
Business owner/ Director	3
Other TYPE IN	4
	(15-18)

Q4 ASK ALL

To ensure we interview a wide cross-section of organisations could you tell me how many employees you have in the UK? READ OUT IF NECESSARY

	(19)
1 only.....	1
2 to 5	2
6 to 10	3
10-50	4
51 to 100	5
101 to 200	6
201 to 250	7
251-500	8
501-1000	9
	(20)
1000+	0
Don't know.....	1

Q5 ASK ALL

Which of the following sectors does your organisation operate in?

READ OUT. SINGLE CODE.

- | | |
|---|------------|
| | (21) |
| Utilities such as providing gas, water, electricity or telephony services | 1 |
| Retail banking | 2 |
| Public services related to health | 3 |
| Public services related to an area other than health..... | 4 |
| Charity sector | 5 |
| Sales | 6 |
|
 | |
| Something else TYPE IN | 7 |
| | (22-25) |
| | (26) |
| Don't know..... | 1 |
| | Goto CLOSE |

IF RESPONDENT IS FROM 080 SAMPLE GO TO Q6

IF RESPONDENT IS FROM 0845 SAMPLE GO TO Q21.

Q6 Can I just check - does your organisation have one or more 080 'freephone' numbers?

IF ANSWER IS "NO" AND RESPONDENT WAS ROUTED FROM Q21 OR Q23 THEN CLOSE. OTHERWISE FOLLOW ROUTING BELOW.

- | | |
|-----------|----------|
| | (27) |
| Yes | 1 |
| | Goto Q7 |
| No..... | 2 |
| | Goto Q21 |

Q7

Do you have a special arrangement in place under which mobile operators do not charge the caller for calls to your number?

ie. Callers from mobile phones to your 080 numbers *won't* be charged?

- | | |
|-----------------|------------|
| | (29) |
| Yes | 1 |
| | Goto CLOSE |
| No..... | 2 |
| | Goto Q8 |
| Don't know..... | 3 |
| | Goto Q8 |

Q8 ASK ALL USING 080 NUMBERS

Do you also have other telephone numbers, starting with anything other than 080, for example 0845, 0871 or 09?

	(28)
Yes	1
No.....	2
Don't know.....	3

**Q9 ASK ALL WITH OTHER NUMBER TYPES (CODE 1 AT Q8).
OTHERS SKIP TO Q10**

Thinking about the different types of telephone number your organisation uses, overall is the freephone 080 number..READ OUT

	(30)
The most important number type	1
The second most important number type	2
Of equal importance to the other number types	3
Less important than the other number types	4
.....	Goto Q21
Not particularly important at all	5
.....	Goto Q21
Don't know.....	6
.....	Goto Q21

IF HAVE OTHER NGNS (CODE 1 AT Q7) READ OUT

For the rest of the survey I'd just like you to think about only 080 freephone numbers, and NOT any other telephone numbers that you operate

**Q10 ASK ALL 080 RESPONDENTS (CODING 2 OR 3 AT Q7, OR 1-3 AT Q9).
OTHERS SKIP TO Q21.**

As you may know, currently calls to 080 freephone numbers are almost always free to callers from landlines, but are rarely completely free to callers from mobile phones. Mobile callers usually pay between 7 and 40 pence per minute.

When someone calls a freephone number with a mobile phone a recorded message tells them that they will be charged, but not how much.

Your organisation will pay a charge whenever someone calls your freephone number.

Before today, were you aware of this?

	(31)
Yes	1
No.....	2

Q11

I'm going to read out a list of features, and I'd like you to tell me how important or not important it is to your organisation that 080 numbers have each of these features.

So firstly...READ OUT FIRST SIDE ANSWER. RANDOMISE

Is that...READ OUT TOP ANSWERS. ROTATE ORDER.

REPEAT

		Very important	Fairly important	Not very important	Not at all important	Don't know/not applicable (DO NOT READ OUT)
Being able to advertise the exact cost of the call to customers	(32)	1	2	3	4	5
The fact that callers from fixed lines don't have to pay for the call	(33)	1	2	3	4	5
Callers from mobile phones don't have to pay for the call	(34)	1	2	3	4	5
How much your organisation has to pay to receive the call	(35)	1	2	3	4	5
The message or brand which is associated with having an 080 number. IF NECESSARY i.e. the image that having a Freephone number gives out to potential callers	(36)	1	2	3	4	5
Being able to obtain a particularly memorable number	(37)	1	2	3	4	5

Q12 What other features are important to you that I've not already mentioned?

TYPE IN

PROBE FULLY. What else?

(38-41)

(42)

None..... 1

Q13 If you could change only one of the following aspects of 080 numbers, which one would it be?

READ OUT. SINGLE CODE. RANDOMISE

(43)

Being able to advertise the exact cost of the call to customers..... 1

The price that callers from mobile phones pay for the call 2

How much your organisation has to pay to receive the call..... 3

Don't know..... 4

Q14 As mentioned, mobile phone companies typically charge the caller between 7 and 40 pence per minute to call 080 freephone numbers. Callers are told they will be charged, but not how much that charge is. Callers can avoid this by calling from a landline.

How do you feel about the impact of these mobile charges on the total number of calls that you receive? Would you say that to your organisation the charge for mobile phone calls to your Freephone number is... READ OUT. ROTATE ORDER

(44)

A major disadvantage 1

..... Goto Q15

A slight disadvantage 2

..... Goto Q15

Overall neither a benefit nor a disadvantage 3

..... Goto Q17

A slight benefit..... 4

..... Goto Q17

A major benefit 5

..... Goto Q17

Don't know..... 6

..... Goto Q17

Q15 ASK ALL THAT STATED "disadvantage" (CODE 1 OR 2) AT Q14

And why do you believe it is a disadvantage?

DO NOT READ OUT. MULTICODE.

PROBE FULLY Why else?

(45)

We could lose important calls/people hang up rather than pay 1

Callers think we are making money from it..... 2

It damages our reputation/doesn't make us look good 3

It confuses customers/they don't understand why they are charged for a 'freephone' call . 4

Other TYPE IN 5

(46-49)

Q16 ASK ALL THAT STATED "disadvantage" (CODE 1 OR 2) AT Q14.

By how much would you be willing to increase the pence-per-minute amount that you pay to receive calls on your freephone number(s) in return for the charge to mobile callers being reduced to zero?

ENTER FIGURE IN PENCE. RE-ENTER FIGURE. NB MAXIMUM IS 99p
 DP - IF FIGURES DON'T MATCH - SHOW ERROR MESSAGE AND ASK INTERVIEWER TO REPEAT.

ENTER FIGURE IN PENCE _____ (50-51)
 (52)

I wouldn't be willing to pay an increase DO NOT READ OUT 1
 Don't know..... 2

Q17 ASK ALL 080 RESPONDENTS

If your freephone number(s) were made completely free to all callers and the amount you currently pay per minute for those calls was increased, how likely would you be to get rid of your freephone number(s)?

Firstly, if the cost per minute to you was increased by READ OUT FIRST PRICE would you say you would...READ OUT SIDE ANSWERS. ROTATE ORDER.

STOP ASKING ONCE 1 IS CODED AT SIDE ANSWERS

And what if it cost READ OUT NEXT PRICE.. REPEAT UNTIL 1 IS CODED OR ALL PRICES ASKED ABOUT

	A. 0.5p	B. 1p	C. 1.5p	D. 2p
	(53)	(54)	(55)	(56)
Be very likely to get rid of your Freephone number(s)	1	1	1	1
Be fairly likely to get rid of your Freephone number(s)	2	2	2	2
Be unsure whether to get rid of your Freephone number(s)	3	3	3	3
Be fairly unlikely to get rid of your Freephone number(s)	4	4	4	4
Be very unlikely to get rid of your Freephone number(s)	5	5	5	5

Q18 ASK ALL SELECTING "very likely" FOR ANY CODE AT Q17

You said that you'd be very likely to get rid of your freephone number if the cost per minute increased to a certain amount.

If you did get rid of your freephone number, which of the following would you be most likely to do?

READ OUT. ROTATE ORDER. SINGLE CODE.

(57)

- Actually keep your freephone 080 number(s) but avoid the increase in cost of operating the number by asking for calls from mobile phones to be blocked..... 1
- Switch that line and those calls to a different number that you already have..... 2
- Get a *new* non-freephone number and use that instead..... 3
- Get rid of that line completely 4
- Don't know..... 5

Q19 ASK ALL SELECTING ANYTHING APART FROM 'DON'T KNOW' AT Q18

And how likely would you be to do that?

Would you be.... READ OUT. SINGLE CODE.

(58)

- Very likely 1
- Fairly likely 2
- Not very likely 3
- Not at all likely 4
- Don't know..... 5

Q20 ASK ALL 080 RESPONDENTS

Now considering another possible change.

Firstly: The cost to your organisation of operating your freephone number stays the same as it is now, and the price of a mobile call falls to no more than 7 pence per minute.

Secondly: The cost to your organisation of operating your freephone number increases, but the price of the mobile call is free to the caller.

So if the cost to the mobile caller was free, but the cost to you increased by READ OUT FIRST COST would that be better or worse for your organisation IF NECESSARY: than if the cost to your organisation of operating your freephone number stays the same as it is now (and the price of the mobile call falls to no more than 7 pence per minute).

SINGLE CODE

READ OUT SIDE ANSWERS IF NECESSARY. ROTATE ORDER.

STOP ASKING ONCE "Worse" IS CODED AT SIDE ANSWERS

And what if offering it free to mobile callers cost your organisation an additional READ OUT NEXT PRICE.. REPEAT UNTIL WORSE IS CODED OR ALL PRICES ASKED ABOUT. Would that be better or worse than keeping the cost to you the same and the cost to the caller falling to a maximum of 7 pence?

	0.5 pence per minute	1 pence per minute	1.5 pence per minute	2 pence per minute
	(59)	(60)	(61)	(62)
Cost to mobile caller is free but organisation pays more is Better	1	1	1	1
Cost to mobile caller is free but organisation pays more is Worse	2	2	2	2
No difference overall DO NOT READ OUT	3	3	3	3
Don't know	4	4	4	4

ALL 080 RESPONDENTS SKIP TO Q35

0845 SECTION

Q21 ASK ALL 0845 SAMPLE AND THOSE ROUTED FROM Q6 OR Q9

Can I just check - does your organisation have one or more 0845 numbers?

	(63)
Yes	1
.....	Goto Q22
No.....	2
.....	Goto Q6
Don't know.....	3
.....	Goto Q6

Q22 ASK ALL USING 0845 NUMBERS

Do you also have other telephone numbers, starting with anything other than 0845, for example 0800, 0871 or 09?

	(64)
Yes	1
No.....	2
Don't know.....	3

Q23 ASK ALL WITH OTHER NUMBER TYPES (CODE 1 AT Q22). OTHERS SKIP TO Q24.

Thinking about the different types of telephone number your organisation uses, overall is/are the 0845 number(s)..READ OUT

	(65)
The most important number type	1
The second most important number type	2
Of equal importance to the other number types	3
Less important than the other number types	4
.....	Goto Q6
Not particularly important at all	5
.....	Goto Q6
Don't know.....	6
.....	Goto Q6

IF HAVE OTHER NGNS (CODE 1 AT Q22) READ OUT

For the rest of the survey I'd just like you to think about only 0845 numbers, and NOT any other type of telephone number that you use.

Q24 ASK ALL 0845 RESPONDENTS

Are any of your 0845 numbers used for dial-up internet access? i.e do you provide an internet access service via an 0845 number?

	(66)
Yes	1
	Goto Q25
No.....	2
	Goto Q26
Don't know.....	3
	Goto Q26

Q25 And do you have any 0845 numbers that are used for incoming voice calls?

	(67)
Yes	1
No.....	2
Don't know.....	3

Q26 Which of the following do you believe is the most accurate statement about the price paid by callers to your 0845 number(s)?

READ OUT. ROTATE ORDER. SINGLE CODE

	(68)
The price from all types of phone line is the same as for calling a normal landline.....	1
Only callers from fixed lines pay the same as for calling a normal landline	2
Only callers from BT lines pay the same as for calling a normal landline	3
The call price varies depending on which phone company the caller uses	4
Don't know.....	5

Q27 As you may already know, the amount consumers pay for 0845 calls varies depending on which telephone company they use. Some fixed-line companies charge less for 0845 calls than for calls to normal landlines, whilst other fixed-line companies charge more. Generally mobile calls to 0845 numbers are outside bundles of 'free' minutes and are more expensive than mobile calls to normal landlines.

A portion of the call charge to your 0845 number(s) is passed on to your organisation. This is a relatively small element of the charge and you may not notice it as a source of income, but instead it might just be used to offset some of the overall costs you pay for operating the 0845 number(s).

Were you aware of this before today?

	(69)
Yes	1
No.....	2
Don't know.....	3

Q28 I'm going to read out a list of features and I'd like you to tell me how important or not important it is to your organisation that 0845 numbers have each of these features

So firstly...READ OUT FIRST SIDE ANSWER. RANDOMISE

Is that...READ OUT TOP ANSWERS. ROTATE ORDER.

REPEAT

		Very important	Fairly important	Not very important	Not at all important	Don't know/not applicable (DO NOT READ OUT)
Being able to advertise the exact cost of the call to customers	(70)	1	2	3	4	5
That callers will be charged the same amount as for a call to a normal landline	(71)	1	2	3	4	5
The cost to you of operating the number	(72)	1	2	3	4	5
The message or brand which is associated with having an 0845 number. . IF NECESSARY i.e. the image that having a dedicated 0845 number gives out to potential callers	(73)	1	2	3	4	5
Being able to obtain a particularly memorable number	(74)	1	2	3	4	5

Q29 What other features are important to you that I've not already mentioned?

TYPE IN

PROBE FULLY. What else?

(75-78)

(79)

None..... 1

Q30 If you could change only one of the following aspects of 0845 numbers, which one would it be?

READ OUT IF NECESSARY. SINGLE CODE. RANDOMISE

- | | |
|---|------|
| | (80) |
| Being able to advertise the exact cost of the call to customers..... | 1 |
| That callers are charged the same amount as for a call to a normal landline | 2 |
| The cost to your organisation of operating this number..... | 3 |
| Don't know..... | 4 |

Q31

I'm now going to describe two different options for how the system for calls to 0845 numbers could be altered.

READ OUT. ROTATE ORDER.

READ OTHER OPTION.

Option 1... the cost to you of operating an 0845 number will increase by 1.5 pence-per-minute, and the cost to callers of calling your 0845 number(s) will be the same as calls to a normal landline number.

Option 2.... neither the cost to your organisation of operating your 0845 number nor the price paid by callers will change, but when your number is mentioned, for example in advertising, it will state that the call charge is split, with 2 pence-per-minute going to you and the rest going to the phone company.

So would you prefer the Option 1 or Option 2?

READ OUT ANSWERS IF NECESSARY.

DP - MAKE SURE THEY APPEAR IN SAME ORDER AS WERE READ OUT

DP - MAKE SURE THE ORDER THAT OPTIONS ARE READ OUT IS RECORDED

- | | | |
|---------------------------------|----------|-------|
| | card: 02 | (6-7) |
| | | (8) |
| 1st OPTION - | | 1 |
| 2nd OPTION | | 2 |
| Don't know DO NOT READ OUT..... | | 3 |

Q32 ASK ALL SELECTING 1st OPTION AT Q31

You said that your favoured option was INSERT "1" IF 1st OPTION READ OUT FIRST, OR "2" IF IT WAS READ OUT SECOND

If in fact the other option was introduced (IF NECESSARY:XXX) which of the following would you be most likely to do.

READ OUT. SINGLE CODE.

- | | |
|---|-----|
| | (9) |
| Keep your 0845 number(s) | 1 |
| Switch that line and those calls to a different number that you already have..... | 2 |
| Get a *new* number and use that instead | 3 |
| Get rid of that line completely | 4 |
| Don't know..... | 5 |

Q33 ASK ALL SELECTING 2nd OPTION AT Q31

You said that your favoured option was INSERT "2" IF 2nd OPTION READ OUT FIRST, OR "1" IF IT WAS READ OUT SECOND

If in fact the other option was introduced (IF NECESSARY: this is where XXX) which of the following would you be most likely to do.

READ OUT. SINGLE CODE.

- | | |
|---|------|
| | (10) |
| Keep your 0845 number(s) | 1 |
| Switch that line and those calls to a different number that you already have..... | 2 |
| Get a *new* number and use that instead | 3 |
| Get rid of that line completely | 4 |
| Don't know..... | 5 |

Q34 ASK ALL SELECTING 1-4 AT EITHER Q32 OR Q33

And how likely would you be to do that?

Would you be.... READ OUT. SINGLE CODE.

- | | |
|-------------------------|------|
| | (11) |
| Very likely | 1 |
| Fairly likely | 2 |
| Not very likely..... | 3 |
| Not at all likely | 4 |
| Don't know..... | 5 |

Q35 ASK ALL

Thank you very much for your time, that is the end of the interview.

If we have any further questions arising as a result of this interview could we re-contact you?

- | | |
|-----------|------|
| | (12) |
| Yes | 1 |
| No..... | 2 |

THANK AND CLOSE

Q36 COMPANY ACTIVITY ATTACH DUN AND BRADSTREET 5 DIGIT US SIC CODE.

_____ (13-17)

Q37 COMPANY SIZE - ATTACH DUN AND BRADSTREET CODE.

_____ (18-22)

Q38 REGION - ATTACH FULL POST CODE

_____ (23-29)

I hereby declare that this interview was conducted within the Market Research Society Code of Conduct.

SIGNED: _____ **DATE:** __/__/__