



Non-Geographic Numbers: Consumer Study

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What are NGNs?

- ❖ A Non-Geographic Number (NGN) is a type of telephone number that is not linked to a particular geographic location identifiable from the number i.e. a NGN does not identify the call termination point. By contrast, a Geographic Number is linked to a particular geographic region that is identifiable from the area code (e.g. '01' for Dublin, '061' for Limerick).
- ❖ NGNs provide a platform for the delivery of a wide variety of services. For example, private companies, public sector bodies and charities use NGNs to provide access to services such as teleconference services, help lines, customer support, product help desks and information services.
- ❖ This survey covers five types of NGN in Ireland:
 - **'1800 XXX XXX'**, Freephone – the total charge for these calls is borne by the called party.
 - **'1850 XXX XXX'**, Shared Cost (per call charge) – the caller is charged for only part of the cost of the call, with the called party being charged for the remainder.
 - **'1890 XXX XXX'**, Shared Cost (per minute charge) – the caller is charged for only part of the cost of the call, with the called party being charged for the remainder.
 - **'0818 XXX XXX'**, Universal Access – the caller is charged a per minute rate for the cost of the call.
 - **'076 XXX XXXX'**, Nomadic – the caller is charged a per minute rate for the cost of the call.

NGN retail call costs

NGN	Retail Tariff
1800	There is no charge to the caller.
1850	<p>The retail tariff can typically range from 4c/Call from a fixed line to 30c/Call from a mobile.</p> <p>The per call retail tariff is set to the originating undertaking's standard rate for a 5 minute call to a Geographic Number. This rate varies between operators.</p>
1890	<p>The retail tariff can typically range from 5c/min from a fixed line to 35c/min from a mobile.</p> <p>The per minute retail tariff is set to the originating undertaking's standard rate for a call of the same duration to a Geographic Number. This rate varies between operators.</p>
0818	<p>The retail tariff can typically range from 4c/min from a fixed line to 45c/min from a mobile.</p> <p>The per minute retail tariff is set to the originating undertaking's standard rate for a call of the same duration to a Geographic Number. This rate varies between operators.</p>
076	<p>The retail tariff can typically range from 4c/min from a fixed line to 45c/min from a mobile.</p> <p>The per minute retail tariff is set to the originating undertaking's standard rate for a call of the same duration to a Geographic Number. This rate varies between operators.</p>

Typical tariffs observed across a number of fixed and mobile operator websites.

Key summary



Service Ownership; awareness and usage of NGNs

- ❖ Mobile ownership is very extensive, 97% of surveyed adults (age 18+) have mobile phones. 59% have household landline phones.
- ❖ 67% of surveyed adults prefer to contact organisations by telephone - 43% use mobile phones to do so and 24% use landline phones.
- ❖ 89% of those surveyed were aware of any NGN:
 - Awareness was highest for '1800' (86%), '1850' (78%) and '1890' (69%); and
 - Awareness was lowest for '0818' (40%) and '076' (16%).
- ❖ 69% of those surveyed have dialled NGNs in the past. The most frequently dialled NGNs (3+ times per year) are '1800', '1850' and '1890' (reflecting the higher awareness of these NGNs).
- ❖ *'It was the only contact number I could find for the company/service – no choice'* was consistently given as the main reason for dialling a NGN.

Awareness and usage of NGNs

- ❖ Of those surveyed who were aware of NGNs:
 - ❖ 33% believed organisations using '1800' NGNs could offer lower call rates
 - ❖ 29% believed organisations using '1850' NGNs could offer lower call rates
 - ❖ 23% believed organisations using '1890' NGNs could offer lower call rates
 - ❖ 33% knew that '1800' NGNs are free to call from a mobile
 - ❖ 40% knew that '1800' NGNs are free to call from a landline
- ❖ Those aware of '1800' NGNs associated the '1850', '1890', '0818' and '076' NGN ranges more closely with calls charged at a per minute rate ('1850' - 41%, '1890' - 42%, '0818' - 32%, and '076' - 21%).
- ❖ 32% correctly answered that '1850' calls are charged on a per call basis.
- ❖ Perceptions of NGN retail tariffs varied by type:
 - ❖ 52% perceived '1890' as expensive
 - ❖ 51% perceived '0818' as expensive
 - ❖ 48% perceived '1850' as expensive
 - ❖ 30% perceived '1800' as expensive
 - ❖ 31% perceived '076' as expensive
- ❖ 41% of those aware of NGNs expressed the belief that '*organisations can make money from customers dialling*' '1850' and '1890' NGNs. This belief fell to 30% for '0818' and '1800' and to 19% for '076'.

Call Packages and Costs

- ❖ Of those surveyed adults who were aware of NGNs:
 - ❖ 37% of landline users and 28% of mobile users did not know if NGN calls are included as free minutes/calls in their call packages
 - ❖ 29% of landline users and 37% of mobile users were certain that NGN calls are not included as free minutes/calls in their call packages
- ❖ Of those who knew if NGN calls are included as free minutes/calls in their call packages, only 5% of landline users and 6% of mobile users had considered the inclusion of NGNs calls in call packages when choosing their provider/package.
- ❖ 42% of those surveyed considered themselves highly or reasonably vigilant about NGN tariffs. 40% considered that they were not particularly or not at all vigilant.
- ❖ Of those surveyed who had received bills or had reviewed additional charges for calls to NGNs, 37% did not pay attention to the cost of NGNs calls and 25% were surprised at the expense of NGNs calls. Most of those who were surprised at the expense of NGN calls subsequently changed their behaviour - 83% changed landline call behaviour and 89% changed mobile call behaviour.
- ❖ 86% of the adults surveyed did not know how much a NGN call costs, per minute or per call.

Call Packages and Costs

- ❖ '1800' NGNs are free to call, meaning there is no retail charge to the caller. Despite this, the following were the average estimates of the cost to the caller of calling an '1800' NGN during business hours:
 - ❖ €0.42 per minute from a landline
 - ❖ €0.60 per minute from a billpay mobile
 - ❖ €0.86 per minute from a prepay mobile
- ❖ '0818' was perceived as the most expensive range to call from a landline – the estimated average charges for a '0818' call was €1.20 per minute.
- ❖ '1890' was perceived as the second next most expensive range to call from a landline – the estimated average charge for a '1890' call was €1.18 per minute.
- ❖ '0818' and '1850' were perceived as the most expensive ranges to call from a billpay mobile – the estimated average charges were €1.58 per minute for a '0818' call / €1.57 per call for a '1850' call.
- ❖ The estimated average charge for a '1890' call from a billpay mobile was €1.37 per minute.
- ❖ '1890' and '1850' were perceived as the most expensive ranges to call from a prepay mobile – the estimated average charges were €1.33 per minute for an '1890' call / €1.29 per call for an '1850' call.
- ❖ The average estimate of the retail charge for calling a '1850' / '1890' / '0818' / '076' NGN from a billpay mobile was higher than the average estimate of the retail charge for calling such a NGN from a prepay mobile.

Call Packages and Costs

- ❖ Only 4% of surveyed adults had looked up the cost of calling NGNs in the previous 3 months. 10% had looked up the cost of mobile calls and 7% had looked up the cost of landline calls.
- ❖ Having no alternative number to call was the main reason given for not looking up the cost of calling a landline or mobile number or a NGN.
- ❖ Many believe that the caller pays for the cost of providing services over NGNs.
- ❖ With regard to the costs of providing services over '1800' NGNs (free of charge to the caller):
 - ❖ 37% believe that *the caller* pays such costs
 - ❖ 36% believe that *the called party* pays such costs
 - ❖ 22% believe that *the caller and called party* both pay such costs
- ❖ With regard to the costs of providing services over NGNs other than '1800':
 - ❖ For '1850' shared cost, 50% believe the caller pays, 32% believe the caller *and* called party both pay, and 15% believe the called party pays
 - ❖ For '1890' shared cost, 53% believe the caller pays and 31% believe the caller *and* called party both pay, and 14% believe the called party pays
 - ❖ For '0818', 58% believe the caller pays
 - ❖ For '076', 40% believe the caller pays and 21% believe the called party pays

Attitudes towards NGNs and calling preferences

- ❖ Of those adults surveyed who were aware of NGNs:
 - ❖ 49% believed NGN calls are more expensive than landline calls
 - ❖ 15% believed landline calls are more expensive than NGN calls
 - ❖ 36% believed there is no price difference between the two
 - ❖ 49% saw no difference in terms of the memorability of NGNs and landline numbers
 - ❖ 34% thought NGNs are easier to remember
 - ❖ 17% thought landline numbers are easier to remember
 - ❖ 39% would prefer to use a landline number to access services
 - ❖ 19% would prefer to use a NGN to access services

- ❖ Of those who had ever called an organisation via a NGN:
 - ❖ 36% would have preferred to call via a landline number, 18% would have preferred to call via a mobile number, and 35% had no preference
 - ❖ 66% indicated that that they had no option but to call the NGN and 14% indicated that they had the option of calling an alternative non-NGN

Attitudes towards NGNs and calling preferences

- ❖ Of those surveyed who expressed a preference for calling an organisation using a landline or mobile number, the main reason given was that it was “cheaper”. Of those who expressed a preference for calling an organisation using a NGN, the main reason given (29%) was that it “feels more direct/easier”. 10% preferred to call via a NGN because it was “easy to remember”.
- ❖ 61% of those who had ever dialled NGNs typically did so with reservations and indicated, amongst other things, that they would make a NGN call only when it was urgent and they could not delay, that they would seek to keep the call as short as possible, and that they would be concerned about the cost of the call.
- ❖ The ‘1800’ NGN range has the lowest avoidance rate at 18%. 28% avoid ‘1850’, 31% avoid ‘1890’, 32% avoid ‘0818’, and 26% avoid ‘076’.
- ❖ 27% of those surveyed would not avoid using any NGN.
- ❖ Over 68% of those surveyed avoid calling NGNs altogether, from landlines and from mobiles.
- ❖ The main reason for not making ‘1800’, ‘1850’, ‘1890’, and ‘0818’ calls was not knowing how much such calls would cost per minute/per call and a perception that such calls are expensive.
- ❖ The main reason for not making ‘076’ calls was not having heard of that NGN range.

Introduction



Research Methodology

- ❖ Fieldwork for this study was conducted in May 2016.
- ❖ The survey consisted of 1,023 individual interviews with adults aged 18+ living in Ireland.
- ❖ The interviews were conducted via CAPI (Computer Aided Personal Interviewing).
- ❖ Interlocking quotas were applied across region, gender, age and socio-economic status to ensure that the findings are fully representative of adults living in Ireland aged 18+.
- ❖ A corrective weight has been applied to the data to ensure that it is fully representative of all adults (the weighting applied has been detailed on the next page).
- ❖ Margin of error on a sample of 1,023 is +/-3%pts. For smaller sub samples the margin will be greater.
- ❖ Significance testing to 95% confidence level has been applied to the data and is highlighted throughout this presentation. In tables, green highlighting = significantly higher result than total result, while red highlighting = significantly lower result than total result.
- ❖ Commentary detailing 'higher' or 'lower' identifies findings that are significantly higher or lower versus the total sample.

A note on reading the charts

- Base sizes on each chart refer to the unweighted base i.e. the raw number of interviews, as significance testing is based on the raw number of interviews. The charted data refers to the weighted percentages as this is the percentage representative of all adults aged 18+ who fall into that category.
- Some sample sizes have been identified as a small base size. These have been asterisked throughout the report. A small base size is defined as 50 responses or less, as base sizes less than this are not statistically robust.
- Responses to all questions have been included however some have a very small base size and caution should be used when reviewing as these will not be significantly robust.
- In some cases percentages will not add up to 100%, this will be due to multi-coded responses where a respondent selected more than one response or due to rounding if +/- 1% of 100%.
- With regards to questions which capture estimated values, the estimate is the average amount given by all respondents who answered that question.

Sample Detail

- Interviews achieved and corrective weighting applied.

	No of interviews	Weighting applied
Total	1,023	100%
*Gender		
Male	499	49%
Female	524	51%
*Age		
18-24	98	12%
25-34	178	22%
35-49	316	30%
50-64	263	21%
65+	168	16%
*Socio-economic status		
ABC1	430	41%
C2DE	547	53%
F	46	6%
*Region		
Dublin	289	29%
Rest of Leinster	263	26%
Munster	300	27%
Conn/Ulster	171	18%

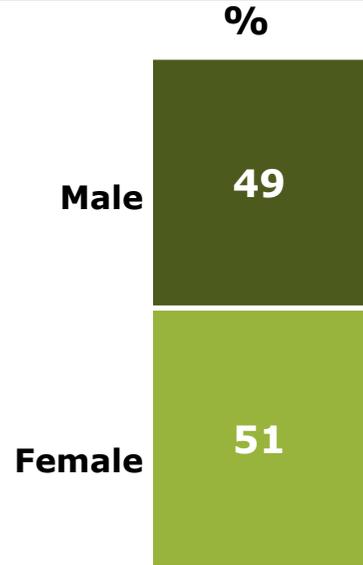
* Source of weighting: CSO 2011

Socio-economic status is based on market research industry agreed figures (AIMRO)

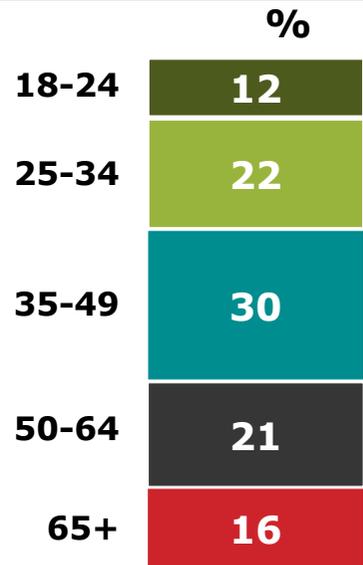
Profile of Sample

Base: All adults aged 18+ (1,023)

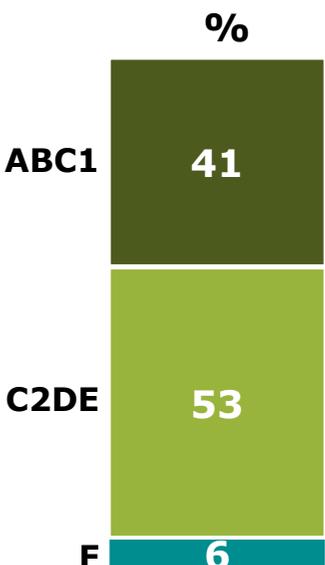
Gender



Age



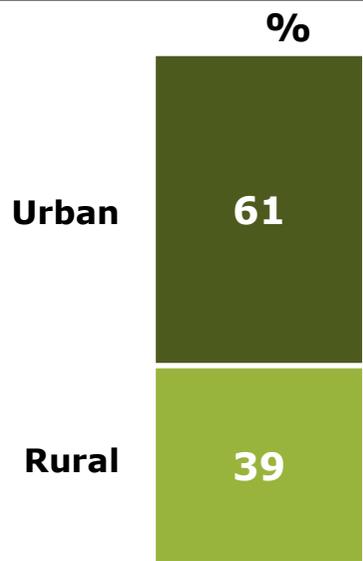
Social Class



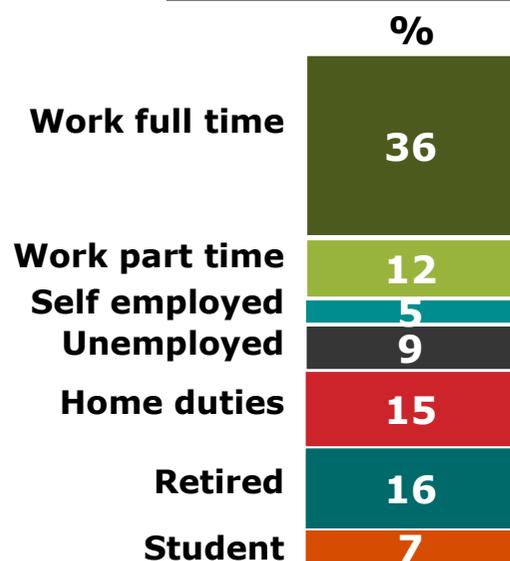
Region



Area



Work Status



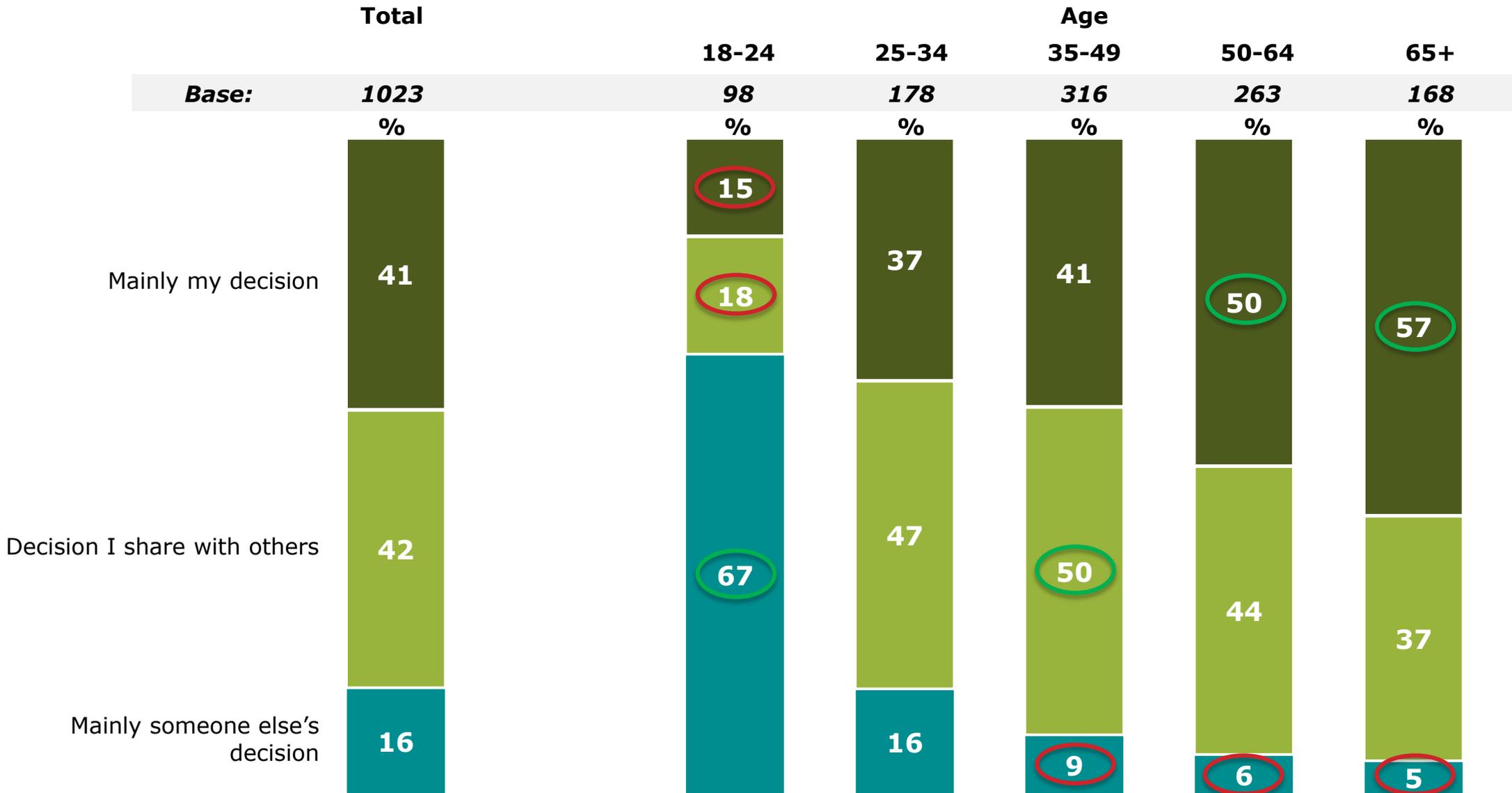
Conn/Ulster



Profile of Sample: Decision maker x age

Base: All adults aged 18+ (1,023)

○ = Significantly higher vs total
○ = Significantly lower vs total



4 in 5 adults have some influence in the selection of the telephone, TV & broadband providers used in their home, with 2 in 5 being the main decision maker. Number of main decision makers is significantly higher among the over 50s while for the U25s it is mainly someone else's decision.

Service Ownership



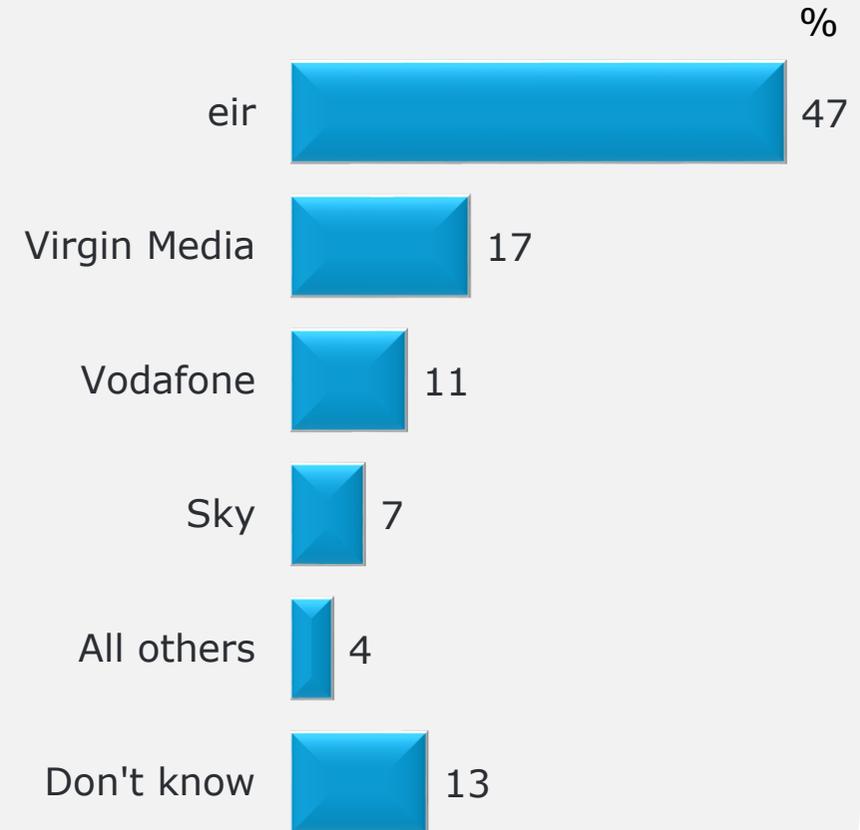
Landline Ownership and Operator

Base: All adults aged 18+ (1,023)



Landline Provider*

(Base: All with landline - 623)



* Based on survey responses

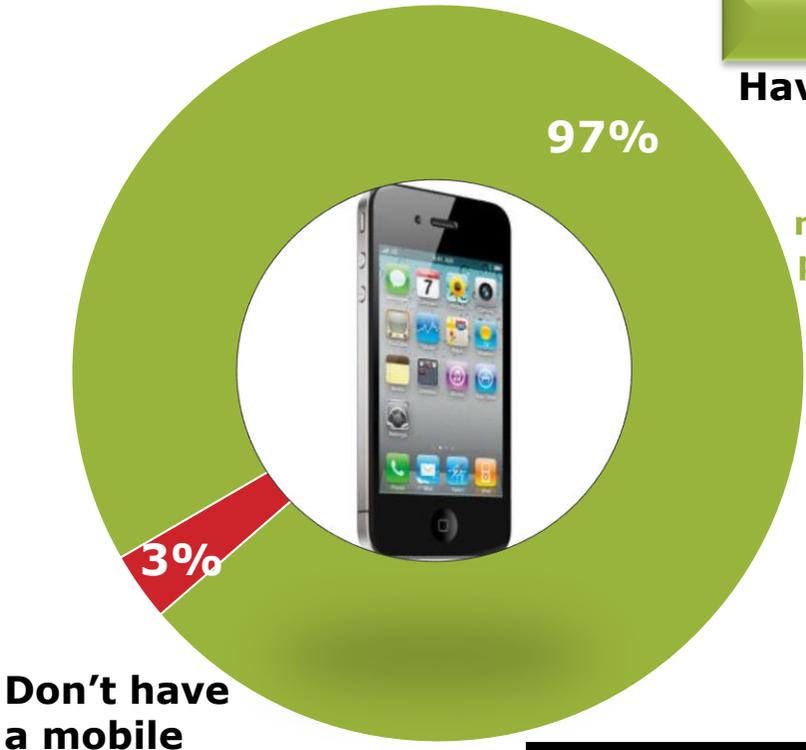
3 in 5 adults claim to have a landline telephone, with eir being the main provider of landline services at 47%.



Q.1b Which company do you pay for your household landline?

Mobile Ownership & Operator

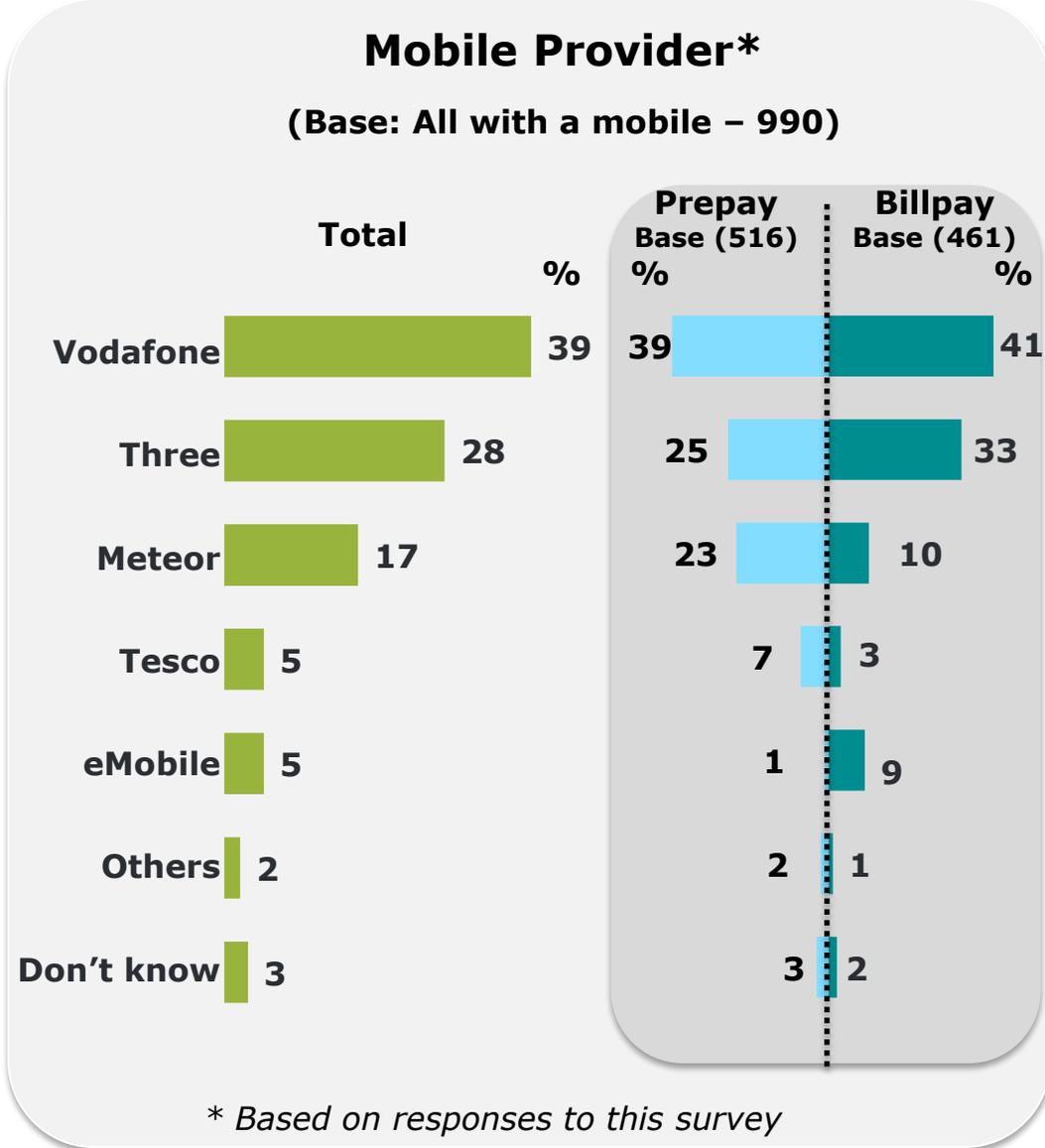
Base: All adults aged 18+ (1,023)



Have a mobile

(equates to 3,330,000 million at current population level)

Type of Mobile	
Prepay, credit top-up	54%
Billpay Mobile	46%
Don't know	2%



97% of adults aged 18+ claim to have a mobile phone, with Vodafone being the main provider.

Preferred method for contacting businesses or organisations x age

Base: All adults aged 18+ (1,023)

○ = Significantly higher vs total
○ = Significantly lower vs total

99% of consumers have ever contacted businesses/ organisations

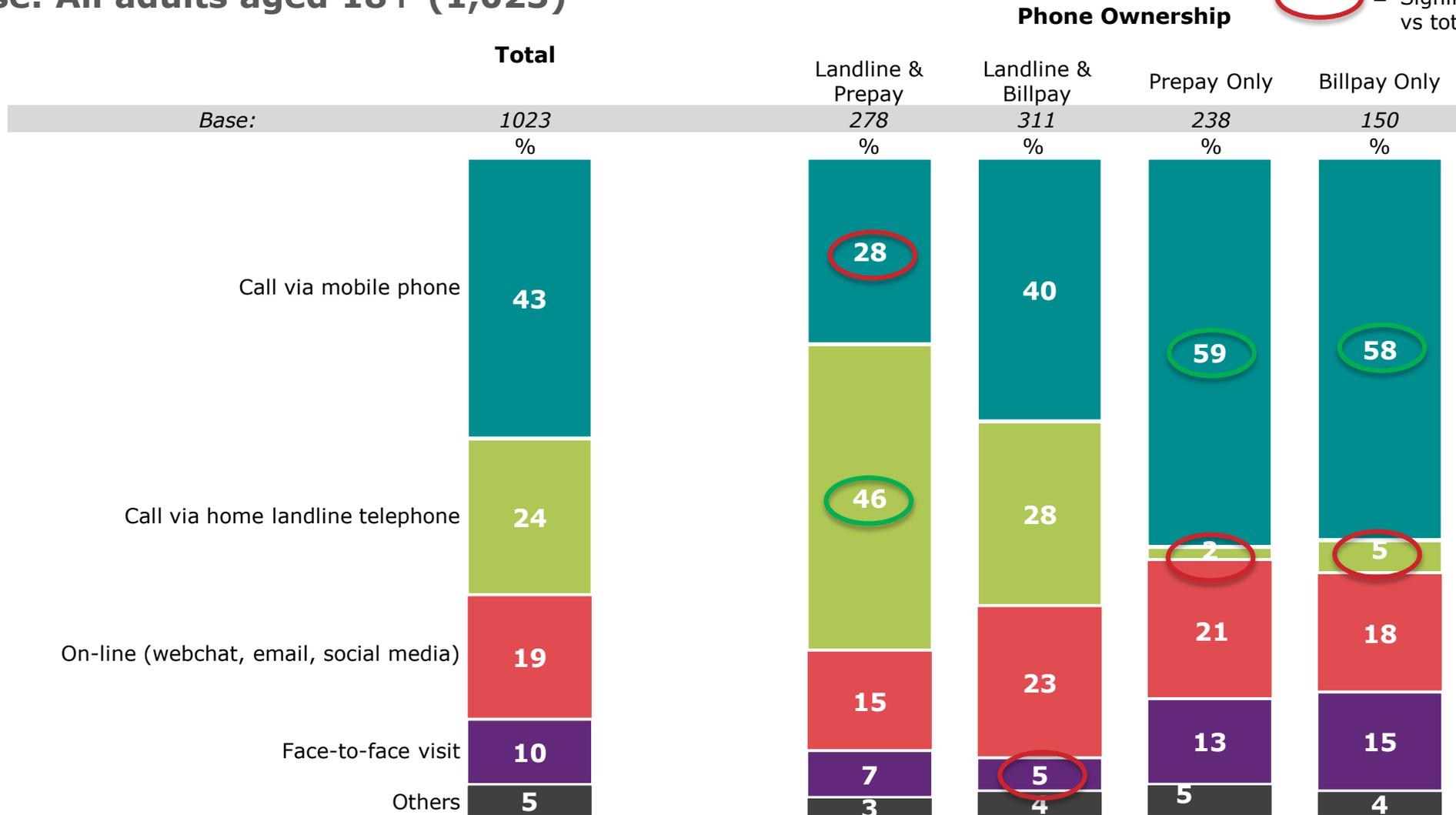


67% of adults prefer to contact businesses or organisations by telephone, 43% using mobile phone and 24% using home landline telephone. Contact via mobile is preferred by younger consumers, while over 65s prefer to use home landline telephone. 1 in 5 prefer to use online chat.

Preferred method for contacting businesses or organisations x phone ownership

Base: All adults aged 18+ (1,023)

○ = Significantly higher vs total
○ = Significantly lower vs total

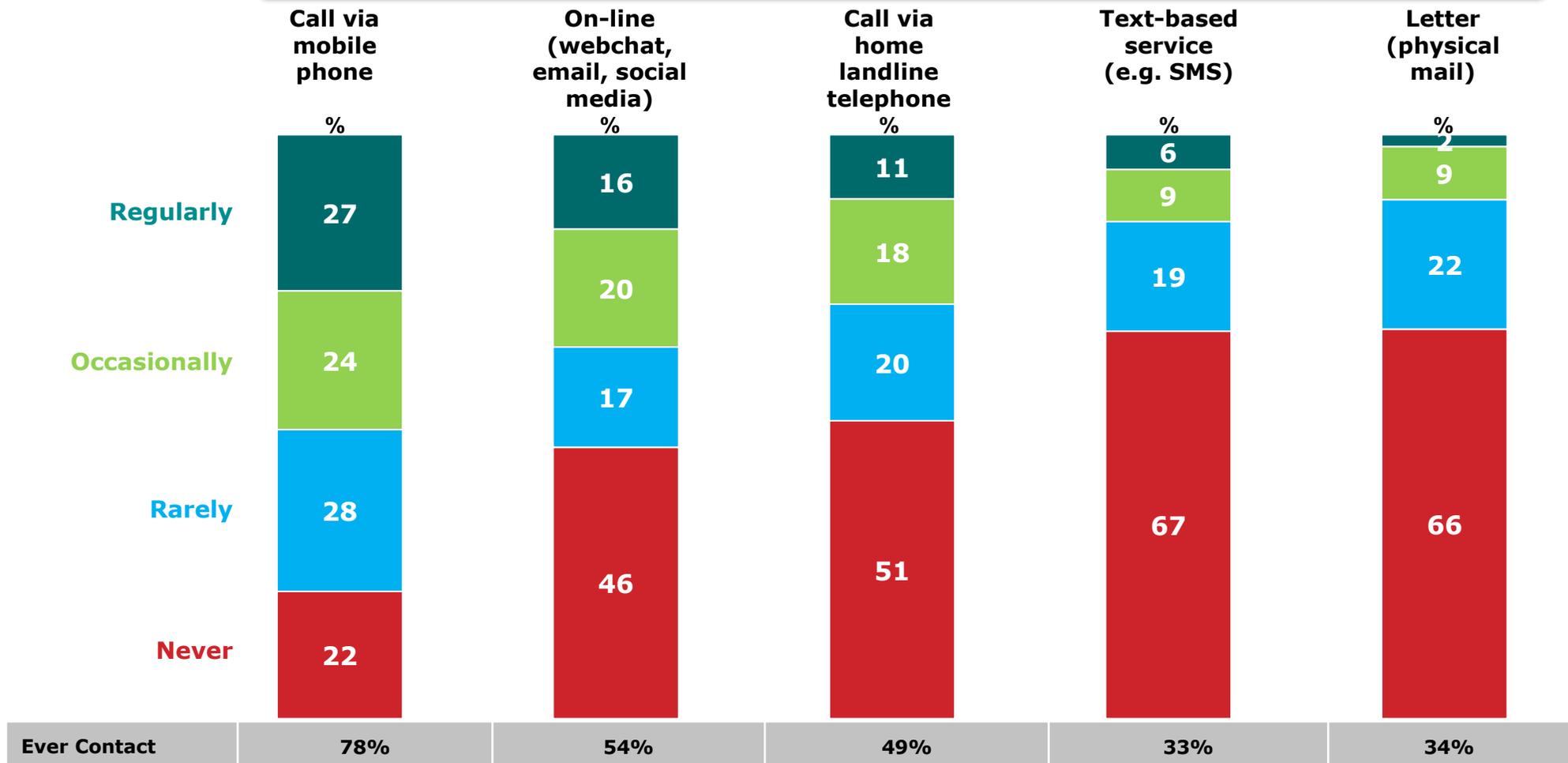


Among those with a landline and prepay mobile phone, contacting organisations via home landline is preferred. Among those with a landline and billpay mobile phone, and among those with a mobile only, call via mobile is preferred.

Frequency of contacting businesses and organisations via various methods

Base: All adults aged 18+ (1,023)

Methods used to contact organisations

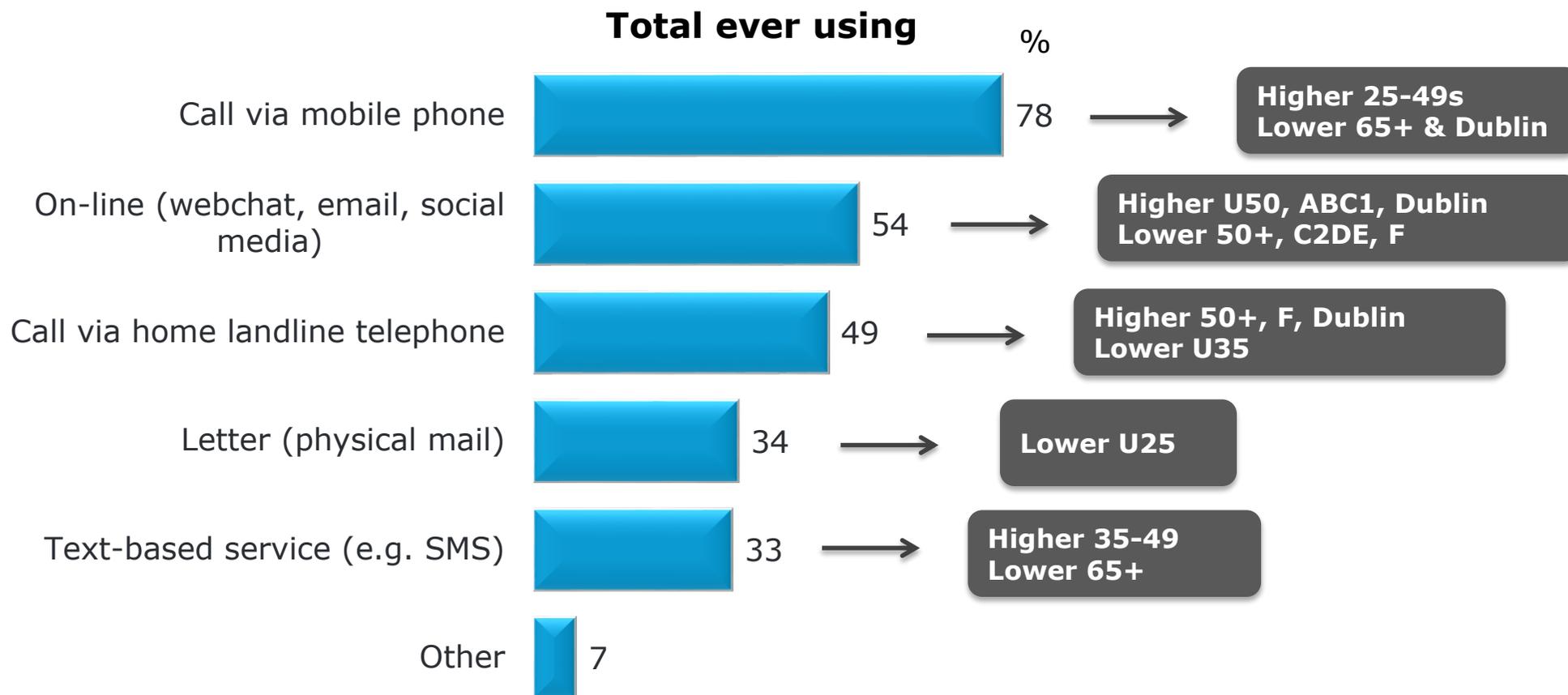


Half of consumers claim to contact organisations regularly or occasionally via mobile phone. Over a third claim to use online methods to contact organisations regularly/occasionally. Text-based services and letters are used least.



Frequency of contacting businesses and organisations (regularly/occasionally/rarely) via various methods

Base: All adults aged 18+ (1,023)



Contacting organisations via mobile phone is significantly higher among 25-49 year olds, whereas the over 50s claim significantly higher use of home landline telephones. Online methods are used more by the under 50s, social class ABC1 and those living in Dublin.

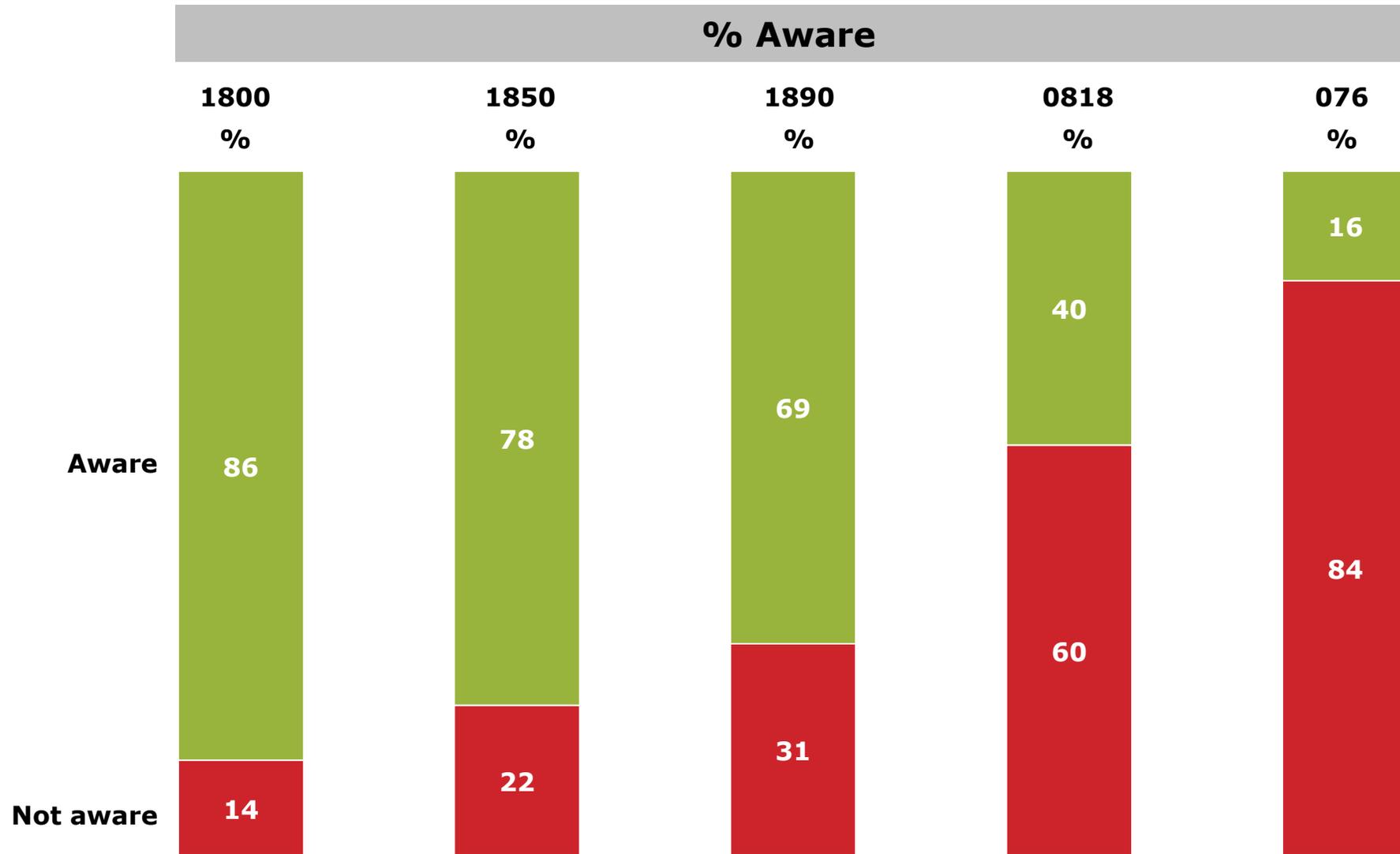
** Multiple responses allowed.
*** See appendix chart for data breakdown.

Awareness & usage of NGNs



Awareness of NGNs

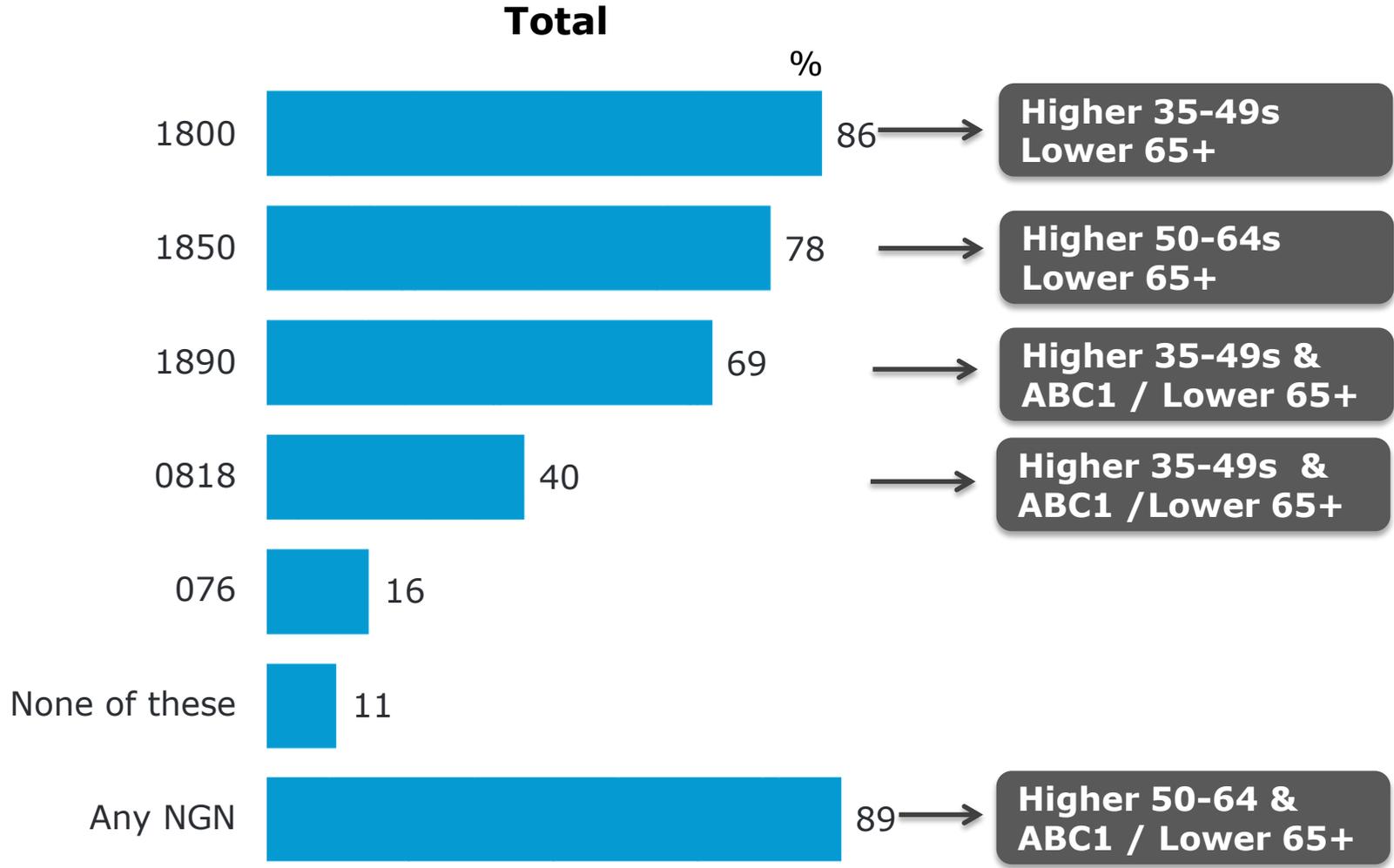
Base: All adults aged 18+ (1,023)



Consumers show highest awareness of 1800 numbers, followed by 1850 and 1890 numbers. 076 numbers achieved the lowest awareness at just 1 in 6 adults aware.

Awareness of NGNs x demographics

Base: All adults aged 18+ (1,023)



Those aged 50-64 claim significantly higher awareness of NGNs while the over 65s claim significantly lower awareness of NGNs. The 35-49 age group claim significantly higher awareness of the 1800, 1890 and 0818 NGNs.

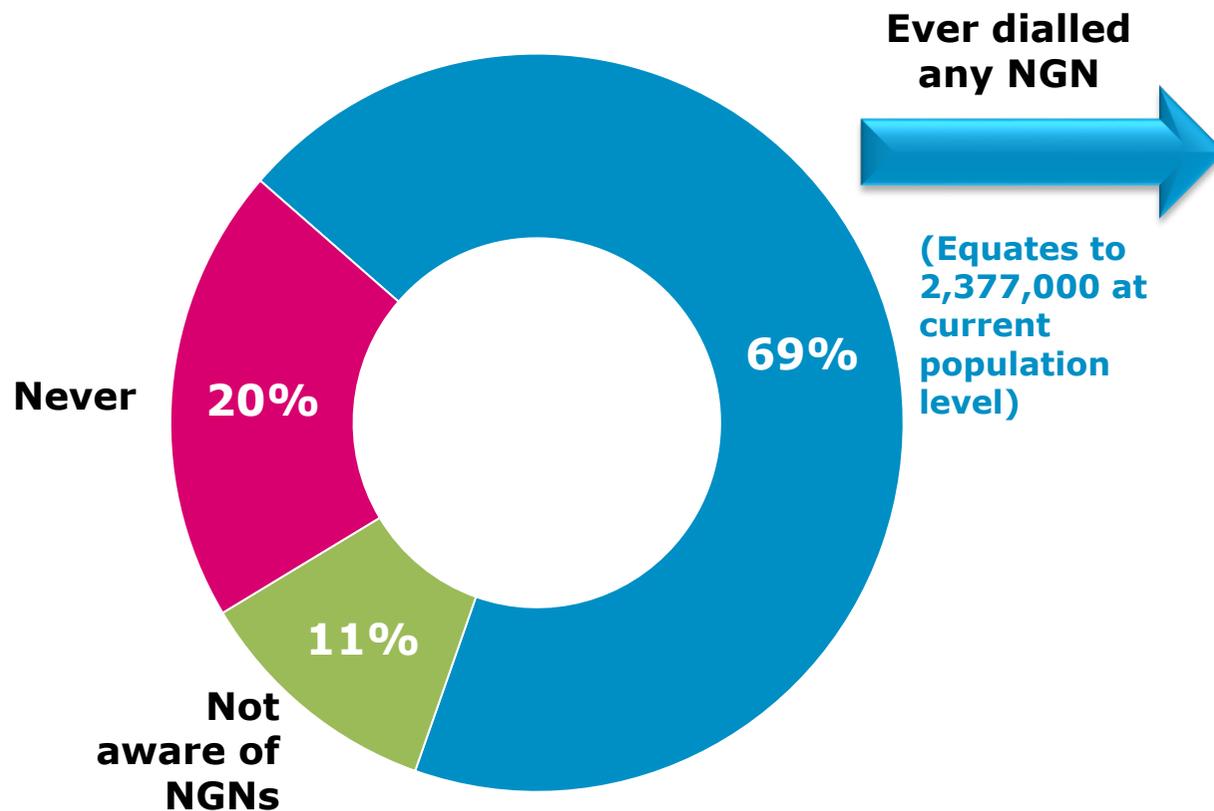
** Multiple responses allowed.
 *** See appendix chart for data breakdown.



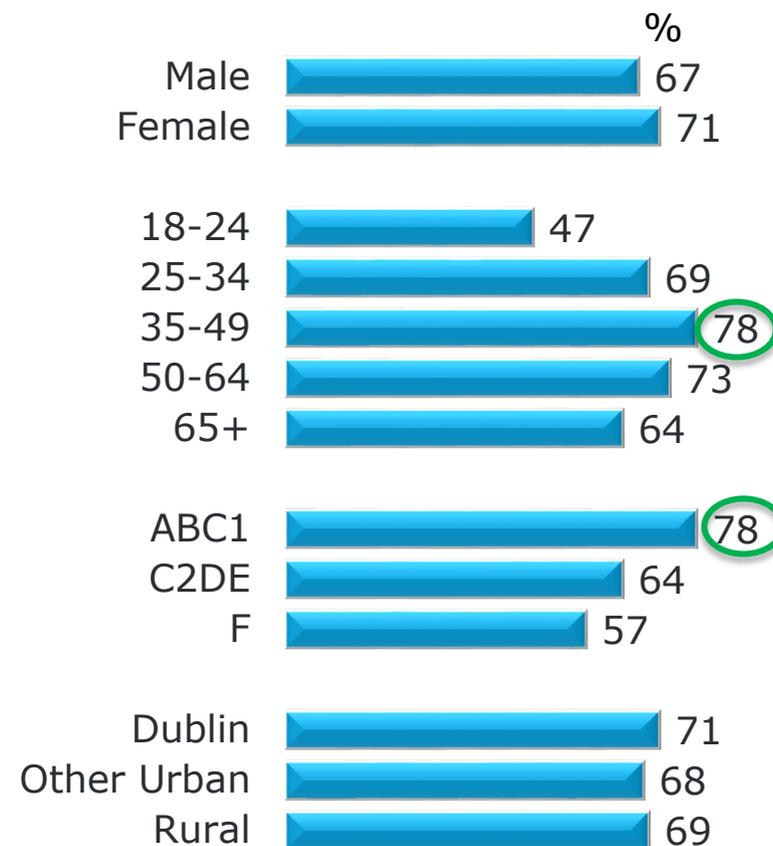
Ever dial any NGN

Base: All adults aged 18+ (1,023)

 = Significantly higher vs total
 = Significantly lower vs total



Ever dialled x Demographics



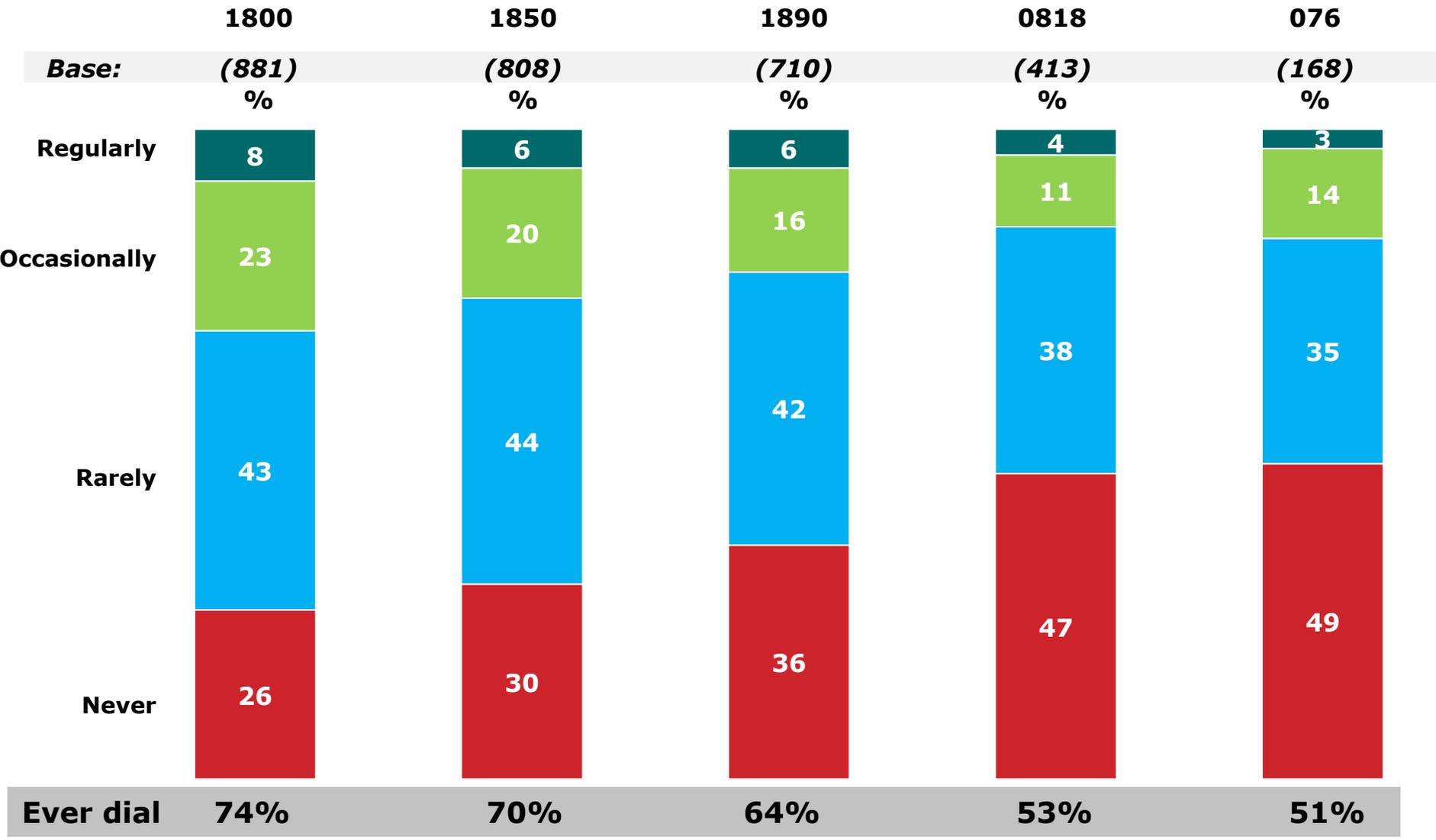
Almost 7 in 10 adults has ever dialled any NGN. This is significantly higher among 35-49 year olds and social class ABC1.



Q.4 How often do you dial any of the following NGNs? For each number type please state regularly (10+ times per year), occasionally (3-10 times per year), rarely (1-3 times a year) or never.

Frequency of dialling NGNs

Base: All aware of specific NGN



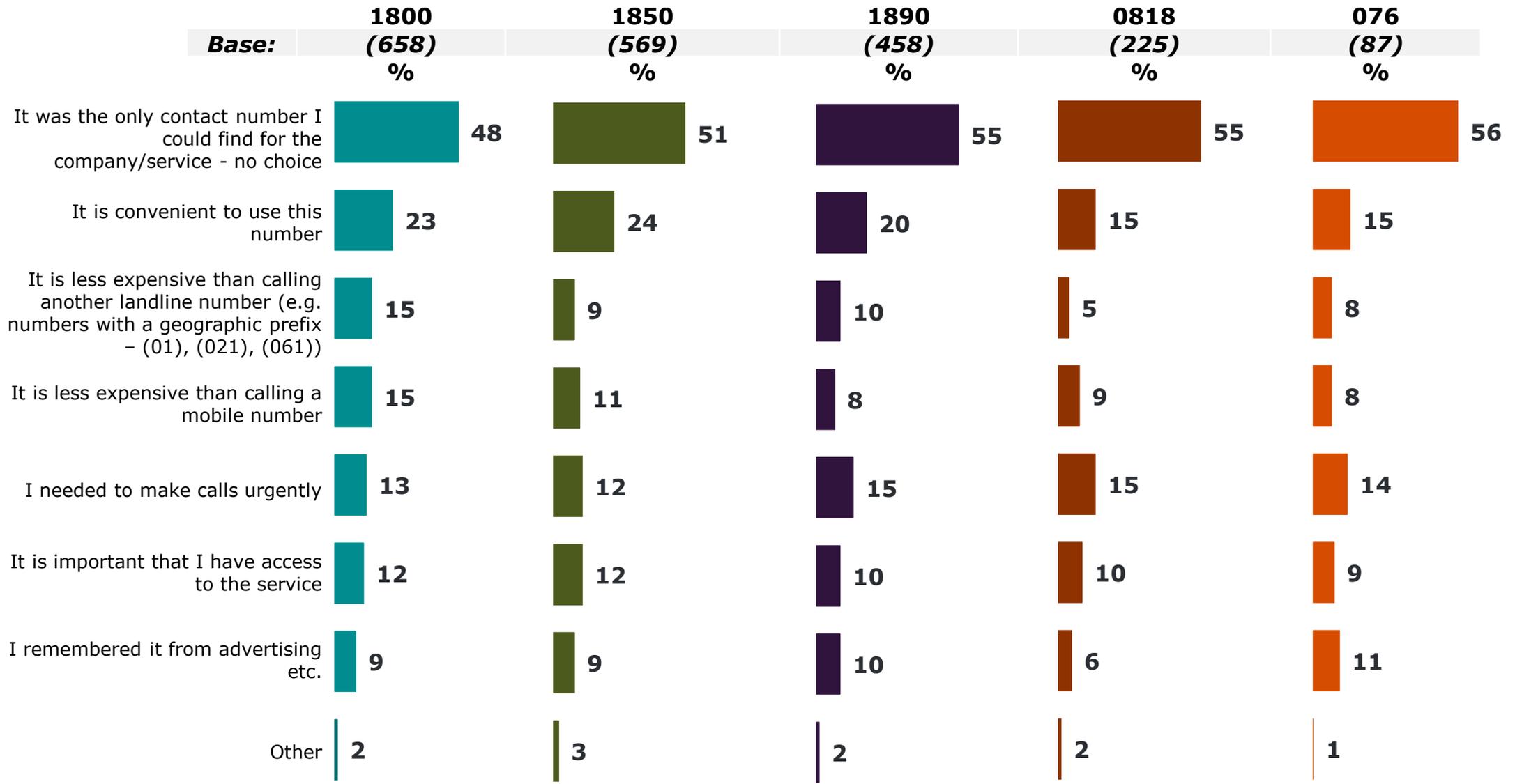
1800 NGNs are the most frequently dialled, followed by 1850 and 1890 NGNs.



Q.4 How often do you dial any of the following NGNs? For each number type please state regularly (10+ times per year), occasionally (3-10 times per year), rarely (1-3 times a year) or never.

Reasons for using Non-Geographic Numbers

Base: All ever dialled NGN



The main reason for using NGNs across all NGNs is 'It was the only contact number I could find for the company/service - no choice'. Convenience is rated higher for the 1800, 1850 and 1890 NGNs than for the 0818 and 076 NGNs.

** Multiple responses allowed.

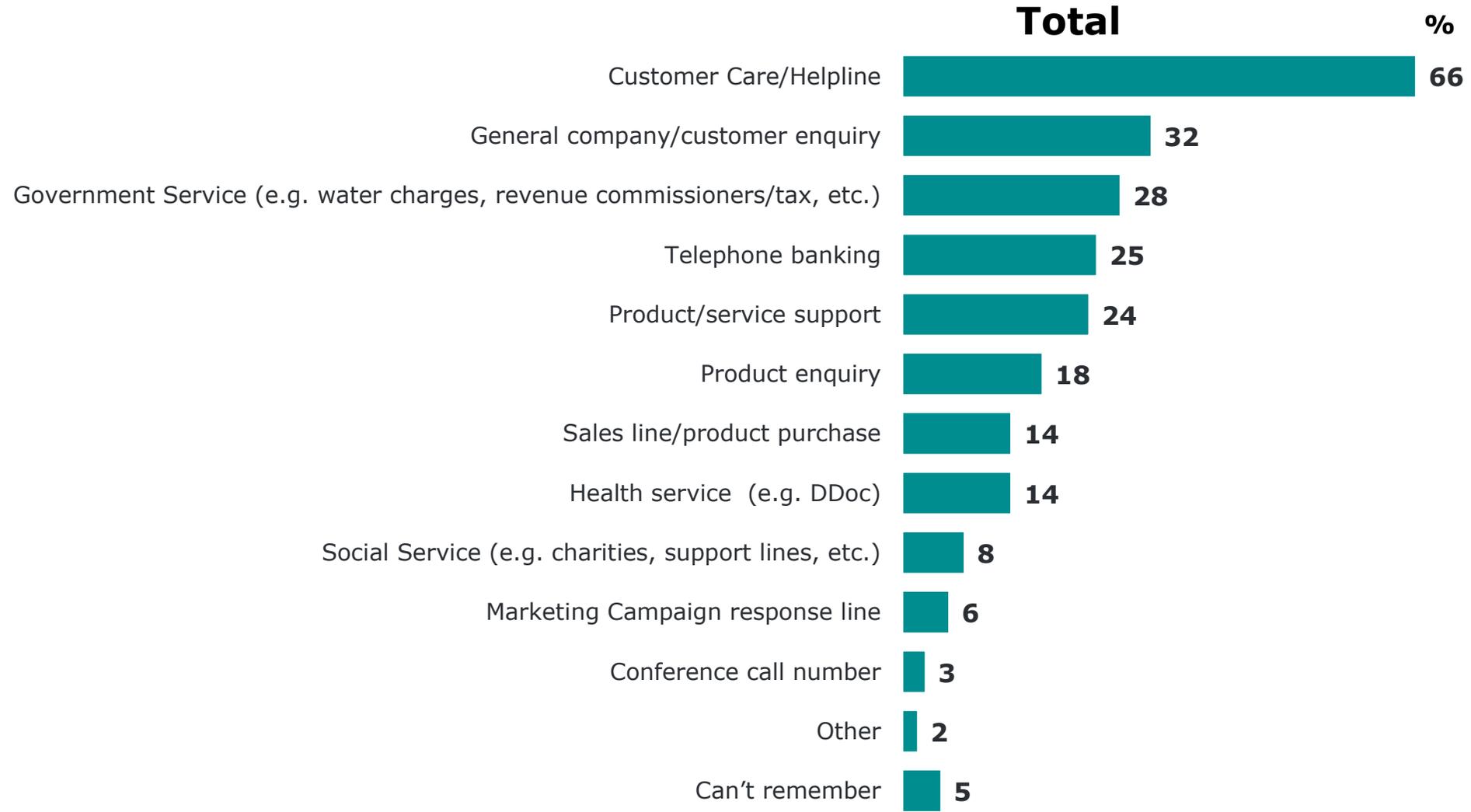


Q.5a Thinking about the NGNs you dial [regularly/occasionally/rarely] such as (LIST EACH IN TURN Q.4), which, if any, of the following are reasons you use these Non-Geographic Numbers.



Services accessed via NGNs

Base: All ever dialled NGN



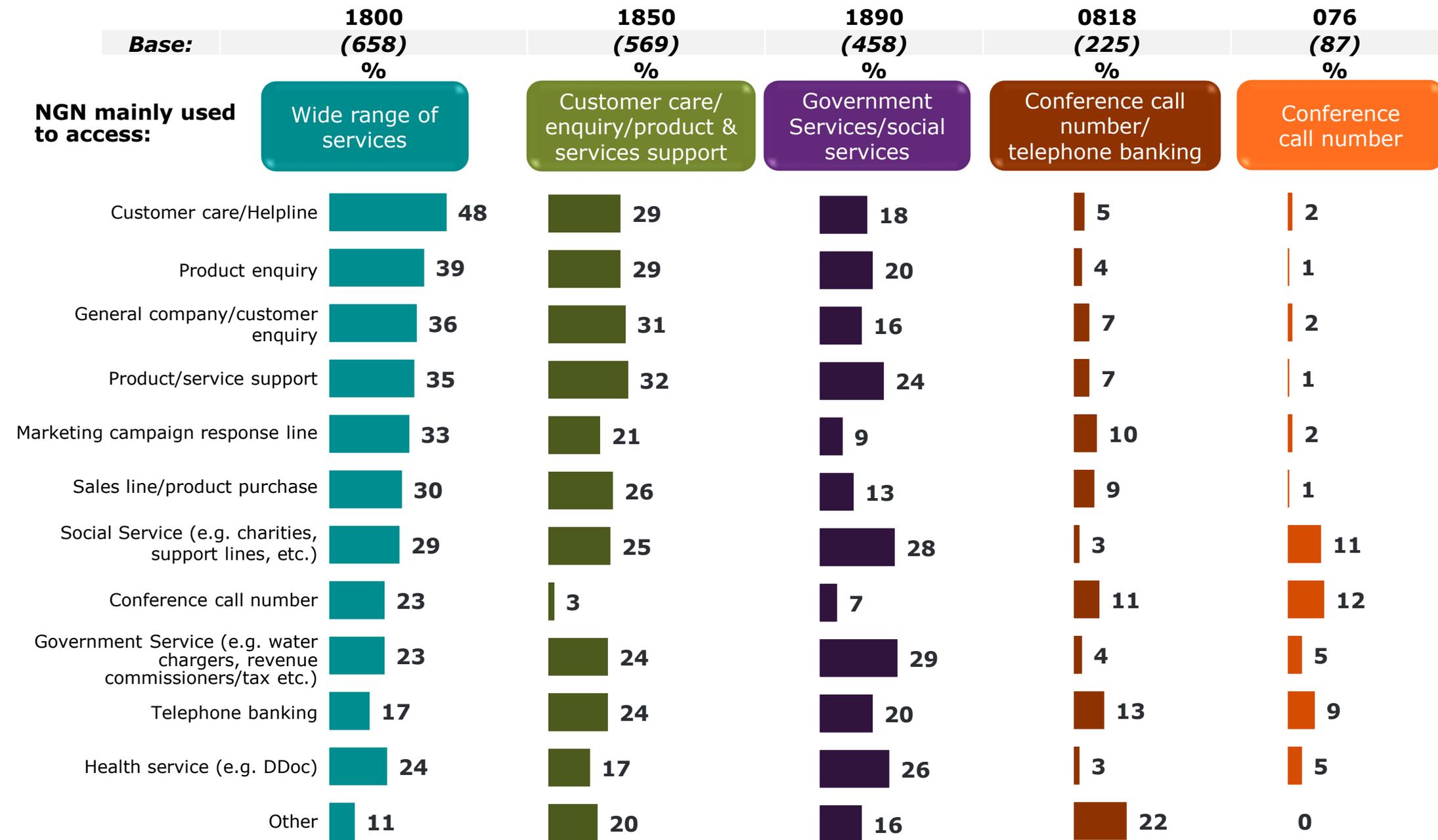
Customer Care/helpline is the main service accessed via NGNs.

** Multiple responses allowed.
 *** See appendix for data breakdown.



Type of NGN used to access each service

Base: All ever dialled NGN



* Others 2% or less.

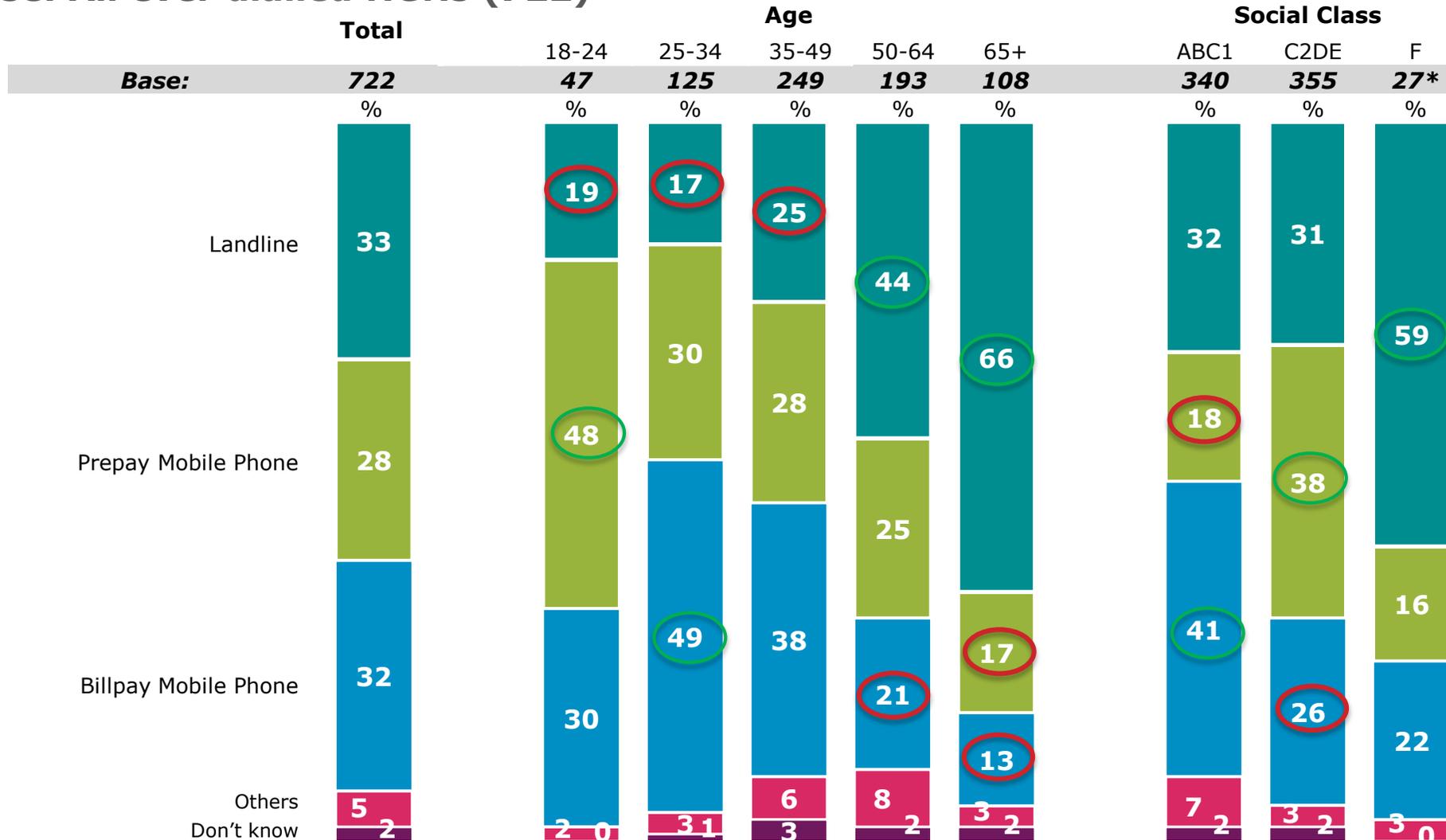
** Multiple responses allowed.



How consumers typically make calls to NGNs

Base: All ever dialled NGNs (722)

○ = Significantly higher vs total
○ = Significantly lower vs total



Over 50s and farmers show a preference for calling NGNs via landlines. The 18-24s and C2DEs mainly call using prepay mobile while 25-34s and ABC1s mainly call NGNs using billpay mobile.

* Caution small base size.
*** See appendix for data breakdown.



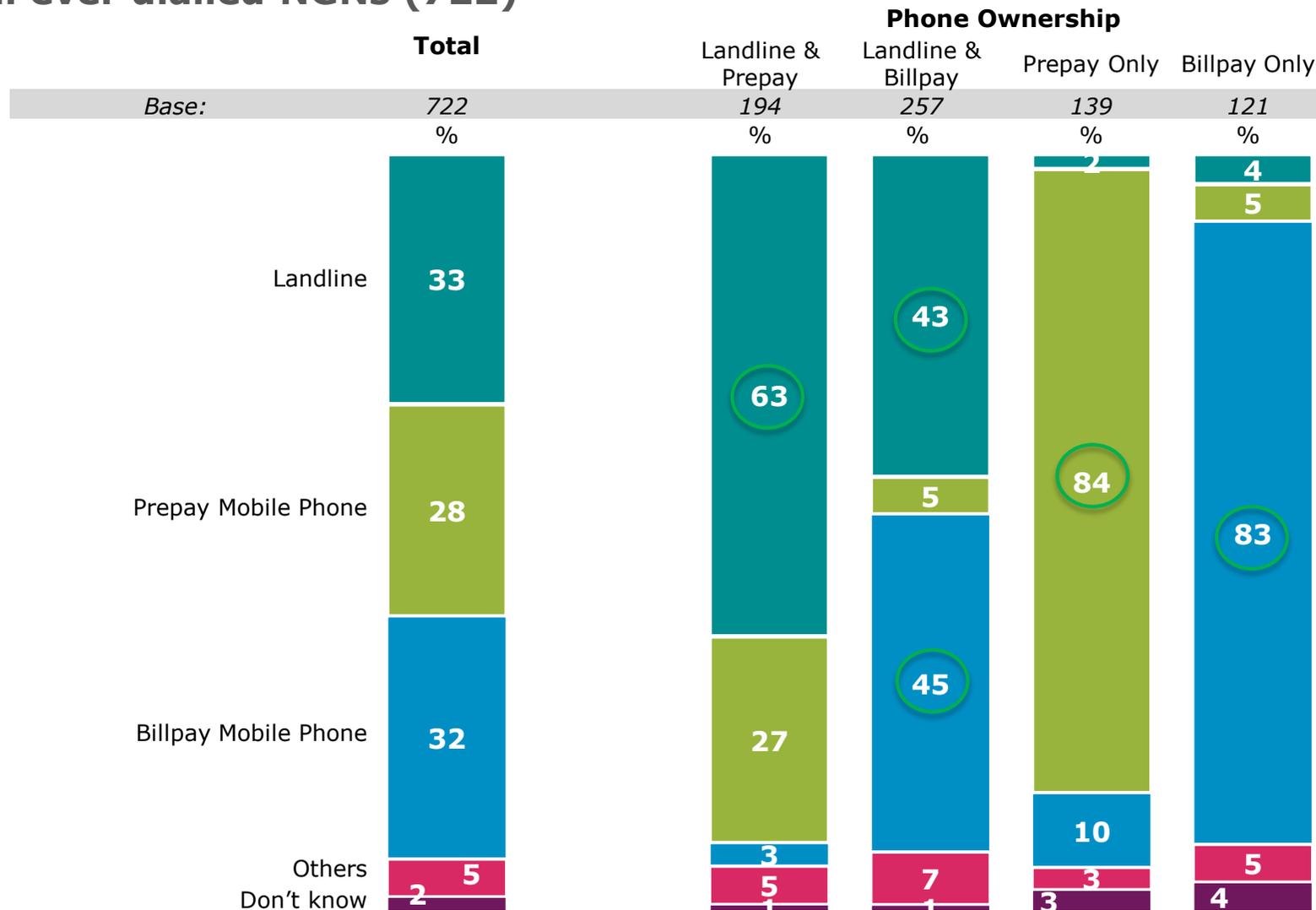
Q.7

Thinking about calling services via NGNs, do you typically make these calls from a landline, a prepay mobile phone or a billpay mobile phone?

How consumers typically make calls to NGNs

 = Significantly higher vs total
 = Significantly lower vs total

Base: All ever dialled NGNs (722)



Those with a landline and a prepay mobile phone are more likely to use their landline when calling NGNs. Those with a landline and a billpay mobile phone seem as likely to call NGNs from their billpay mobile as from their landline.

*** See appendix chart for data breakdown.



Q.7

Thinking about calling services via NGNs, do you typically make these calls from a landline, a prepay mobile phone or a billpay mobile phone?

How consumers typically make calls to NGNs x NGNs ever used

Base: All ever dialled NGNs (722)

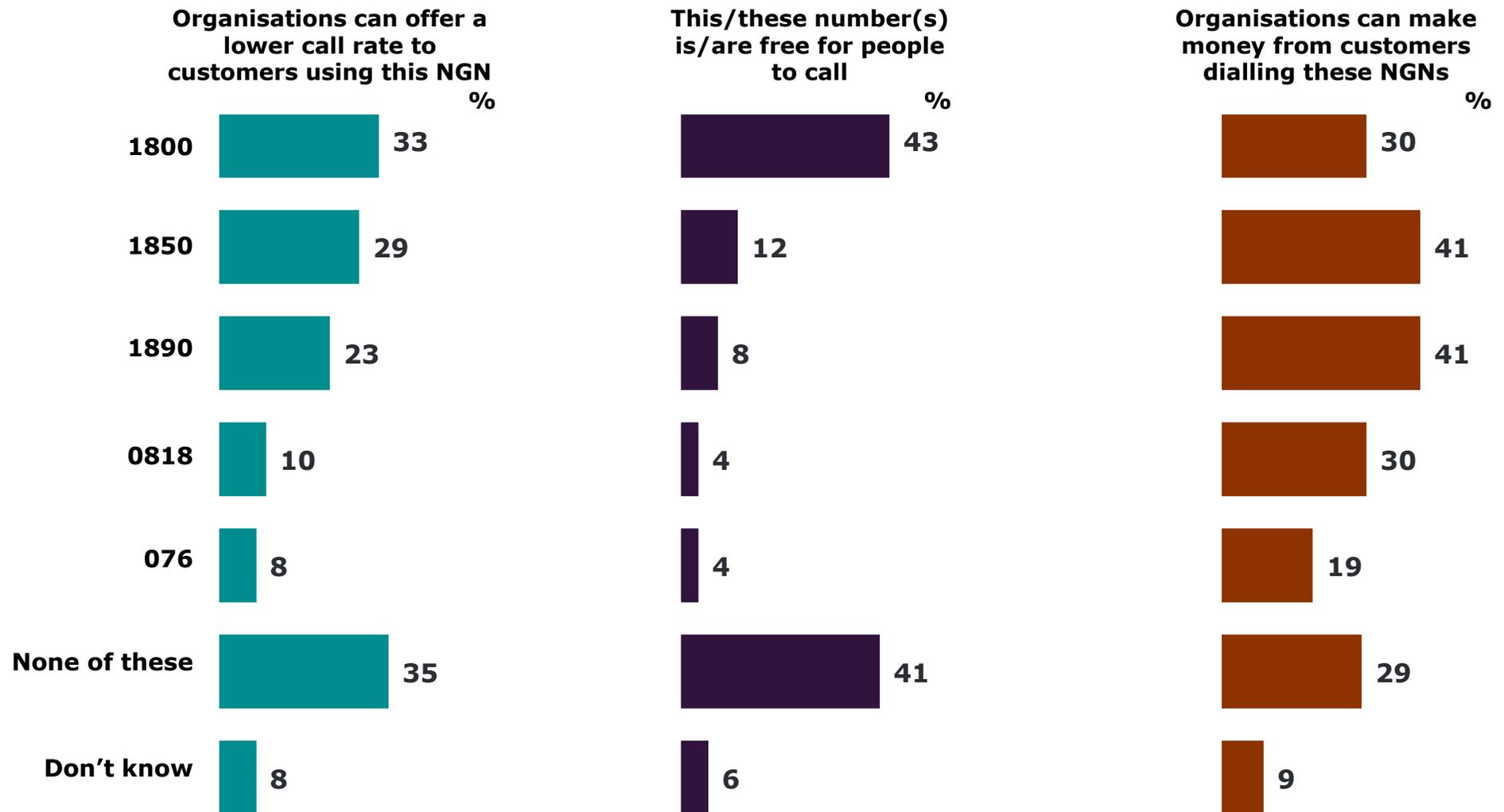
	Total	NGN Ever Used				
		1800	1850	1890	0818	076
Base	722	658	569	458	225	87
	%	%	%	%	%	%
Landline	33	33	33	29	23	16
Prepay Mobile Phone	28	27	27	28	28	38
Billpay Mobile Phone	32	32	34	38	39	36
Whichever is most convenient	4	4	4	3	6	6
Depends on which NGN I am dialling	1	1	1	1	1	1
Don't know	2	2	2	1	2	3

 = Significantly higher vs total
 = Significantly lower vs total

**Calls to 0818 NGNs are significantly more likely to be made using a billpay mobile phone.
 Calls to 0818 and 076 NGNs are significantly less likely to be made using a landline.**

NGNs associated with each of the following statements

Base: All aware of NGNs (919)



2 in 5 associate 1800 NGNs with free calls. 1 in 3 associate 1800 NGNs with organisations being able to offer a lower rate to customers but 1 in 3 also associate 1800 NGNs with organisations making money from customers dialling. 2 in 5 associate 1850 and 1890 NGNs with organisations making money from customers dialling these NGNs.

** Multiple responses allowed.

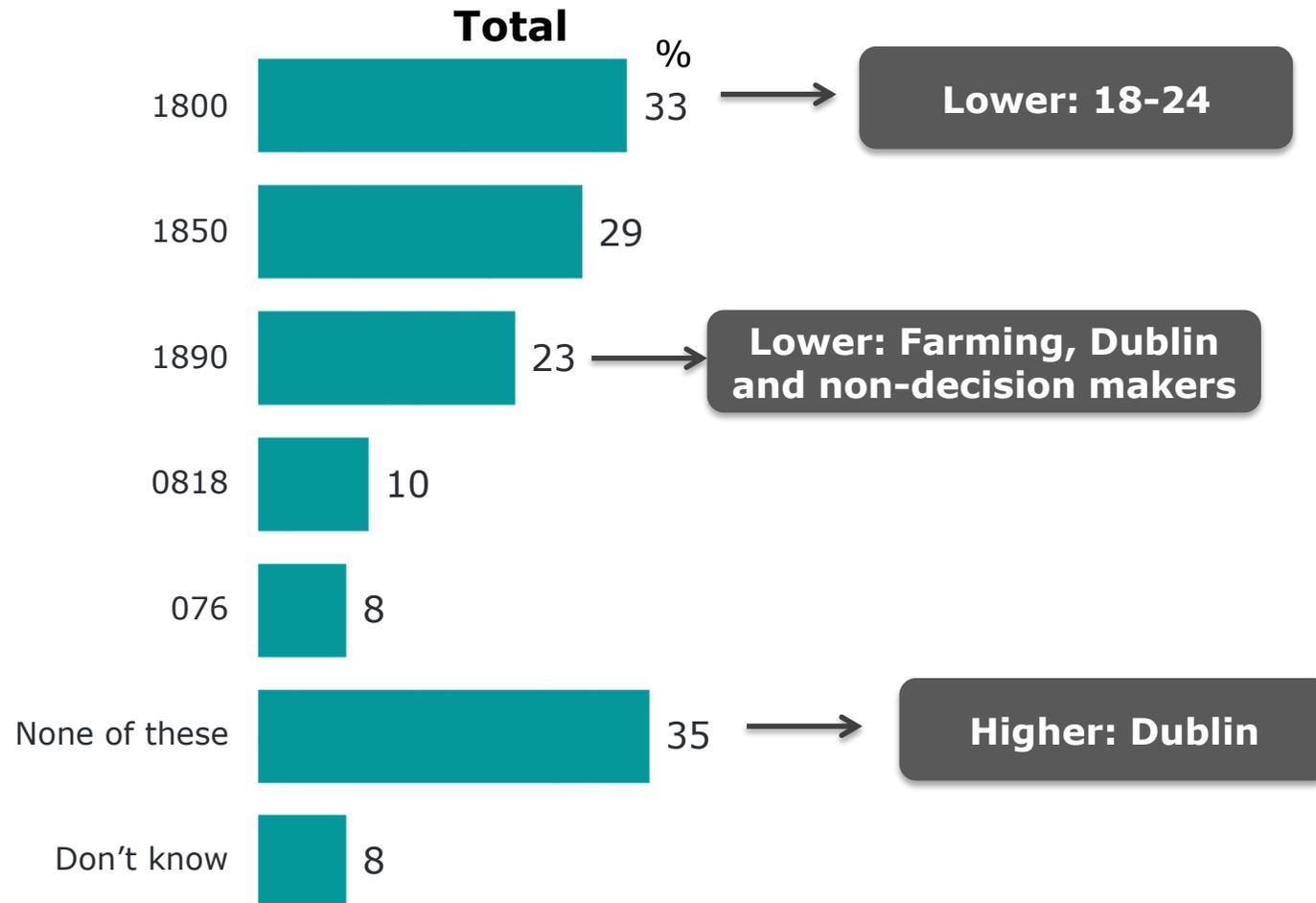


Q.8 Which NGN or NGNs, if any, do you associate with each of the following statements. You can mention as many or as few NGNs as you like per statement.



'Organisations can offer a lower call rate to customers using this NGN' by demographics

Base: All aware of NGNs (919)



33% of those aware of NGNs associate the 1800 NGN with organisations offering a lower call rate to customers but this association was significantly lower among 18-24 year olds. 35% associate none of the NGNs with organisations offering a lower call rate to customers and those in Dublin were significantly more likely to think this.

** Multiple responses allowed.

*** See appendix chart for data breakdown.

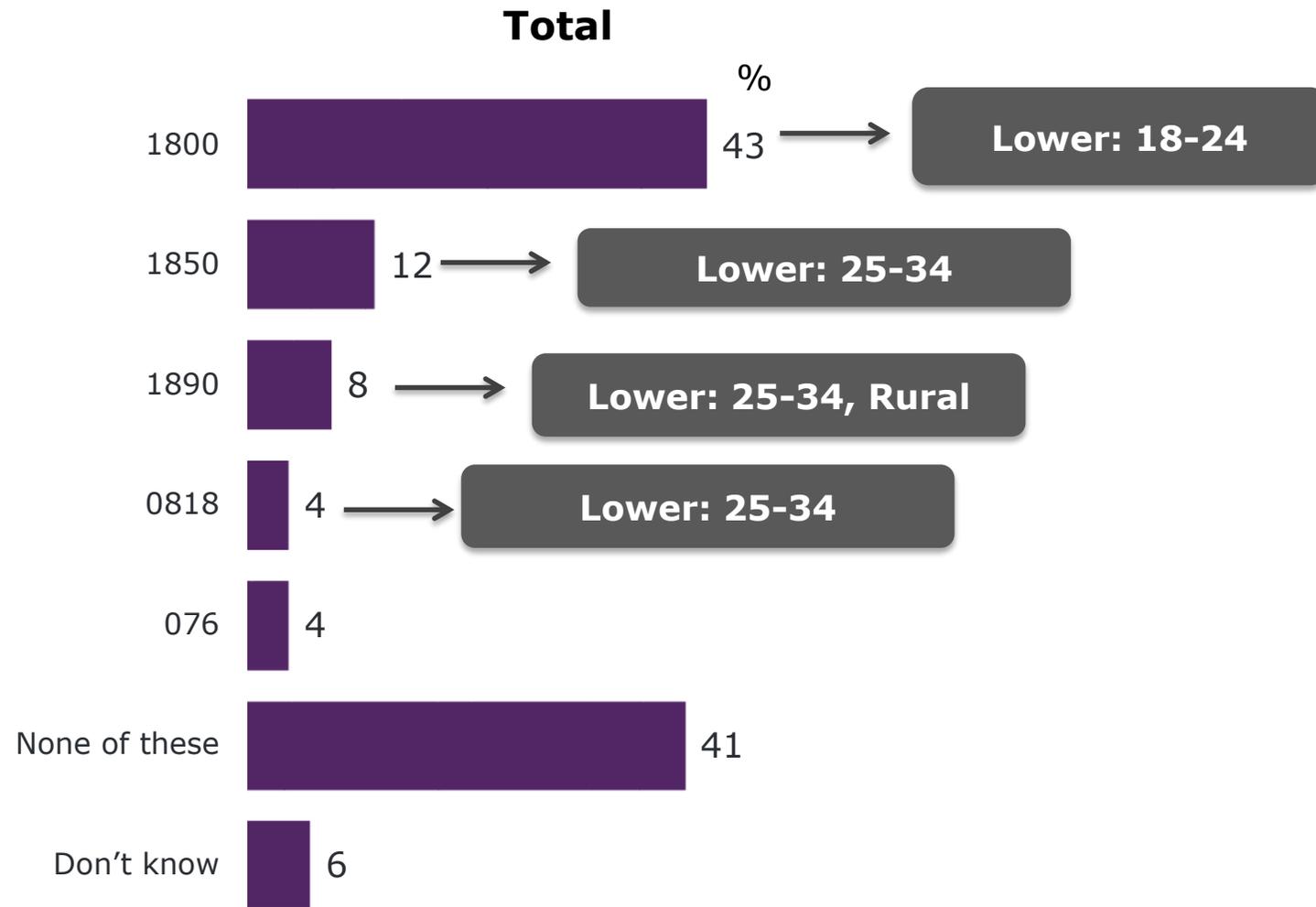


Q.8 Which NGN or NGNs, if any, do you associate with each of the following statements. You can mention as many or as few NGNs as you like per statement.



'This/these number(s) is/are free for people to call' by demographics

Base: All aware of NGNs (919)



2 in 5 of those aware of NGNs associate 1800 numbers with 'this/these numbers is/are free for people to call'. Those aged 18-24 however were significantly less likely to associate 1800 numbers with free calls. 41% associated none of the NGNs with being free for people to call.

** Multiple responses allowed.

*** See appendix chart for data breakdown.

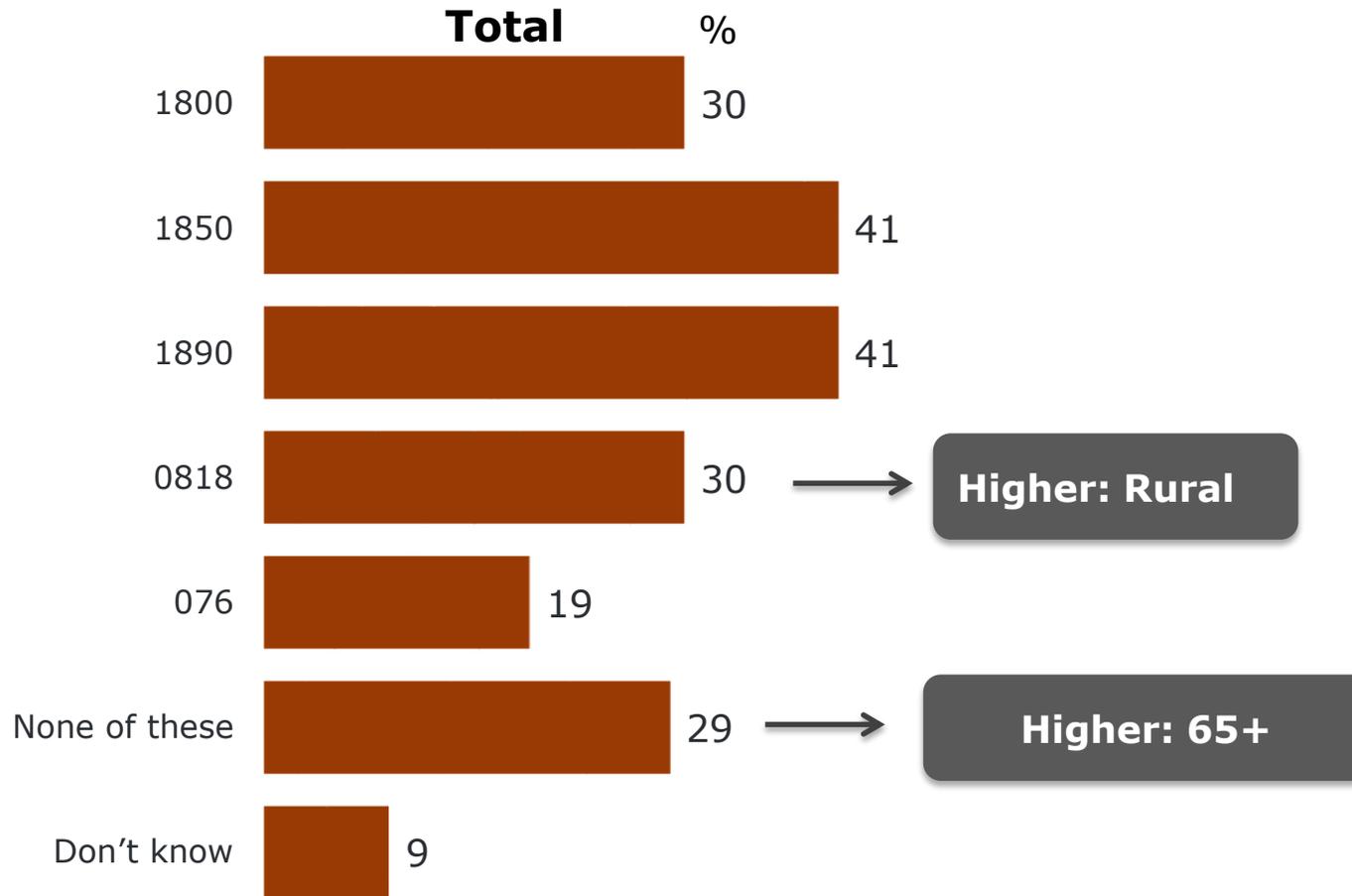


Q.8 Which NGN or NGNs, if any, do you associate with each of the following statements. You can mention as many or as few NGNs as you like per statement.



'Organisations can make money from customers dialling these NGNs' by demographics

Base: All aware of NGNs (919)



2 in 5 of those aware of NGNs associate the 1850 and 1890 NGNs with organisations being able to make money from customers dialling. Those aged 65+ were significantly less likely to associate any NGNs with organisations being able to make money from customers dialling.

** Multiple responses allowed.

*** See appendix chart for data breakdown.

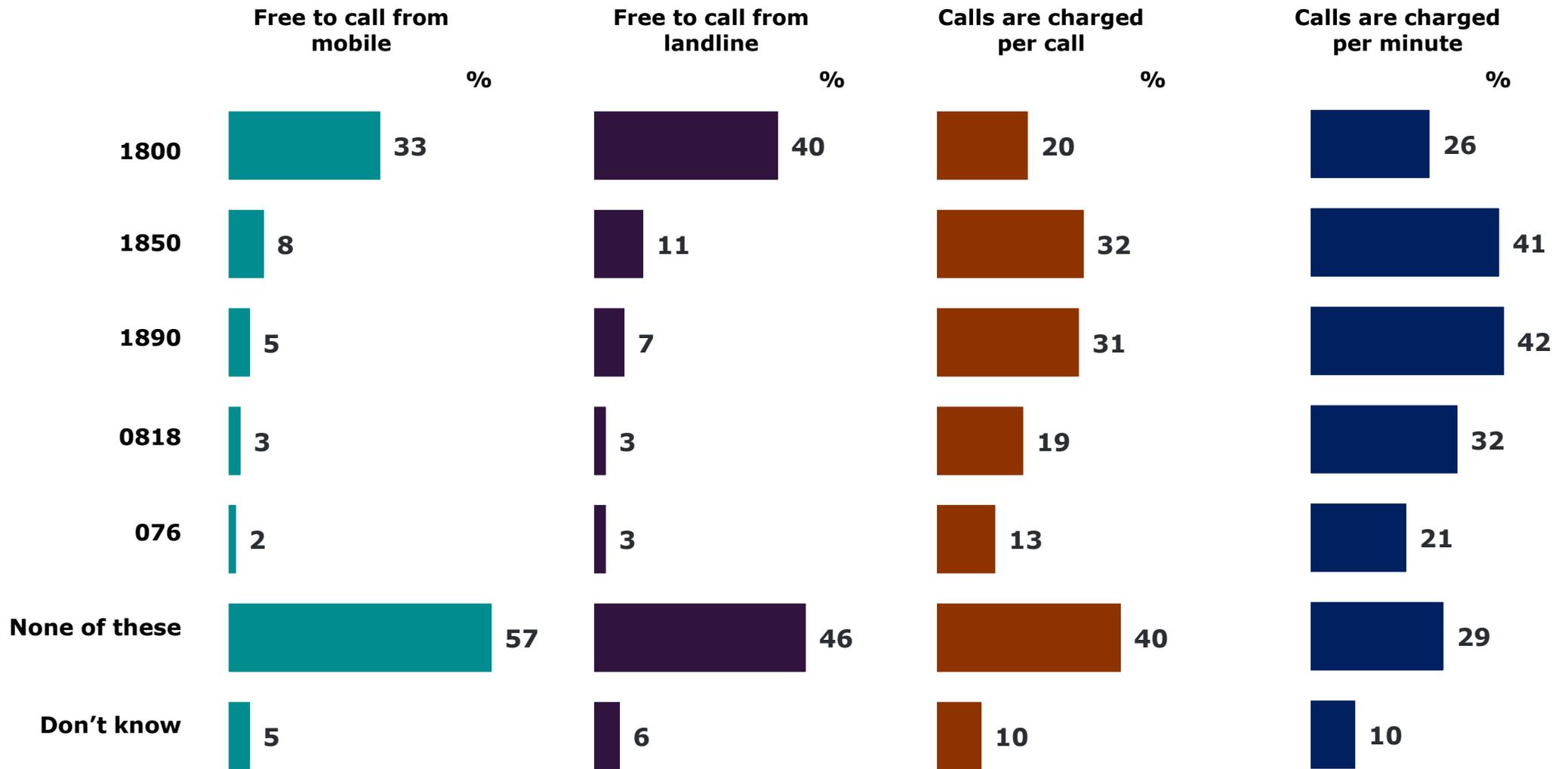


Q.8 Which NGN or NGNs, if any, do you associate with each of the following statements. You can mention as many or as few NGNs as you like per statement.



Cost associations

Base: All aware of NGNs (919)



One third of those aware of NGNs associate 1800 numbers with being free to call from mobile and 2 in 5 associate them with being free to call from landline. All other NGNs are more closely associated with calls being charged on a per minute rate.

** Multiple responses allowed.

*** See appendix for data breakdown.



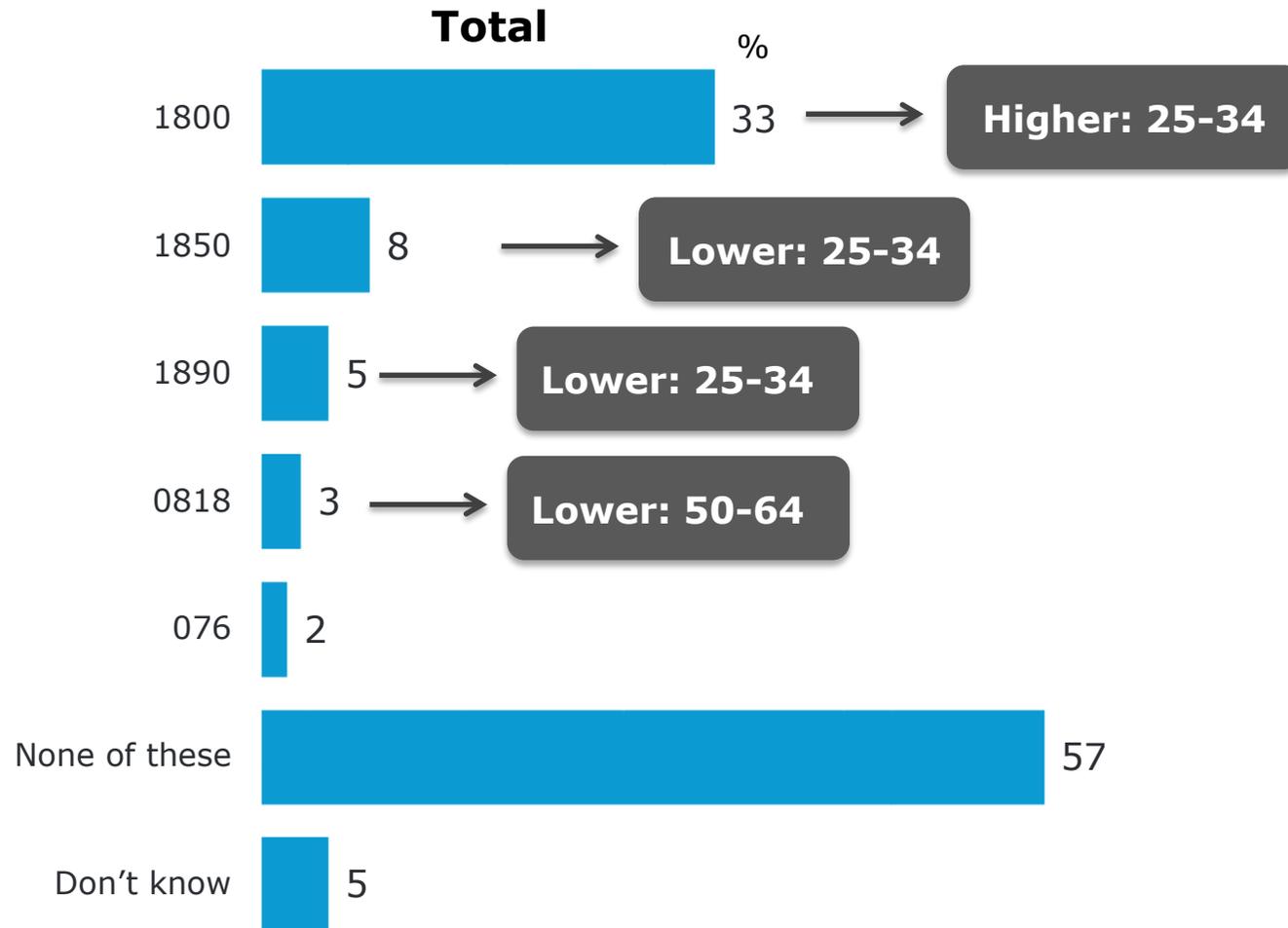
Q.9

For each statement I show you, please tell me which NGN or NGNs you think is/are associated with it?



'Free to call from mobile' by demographics

Base: All aware of NGNs (919)



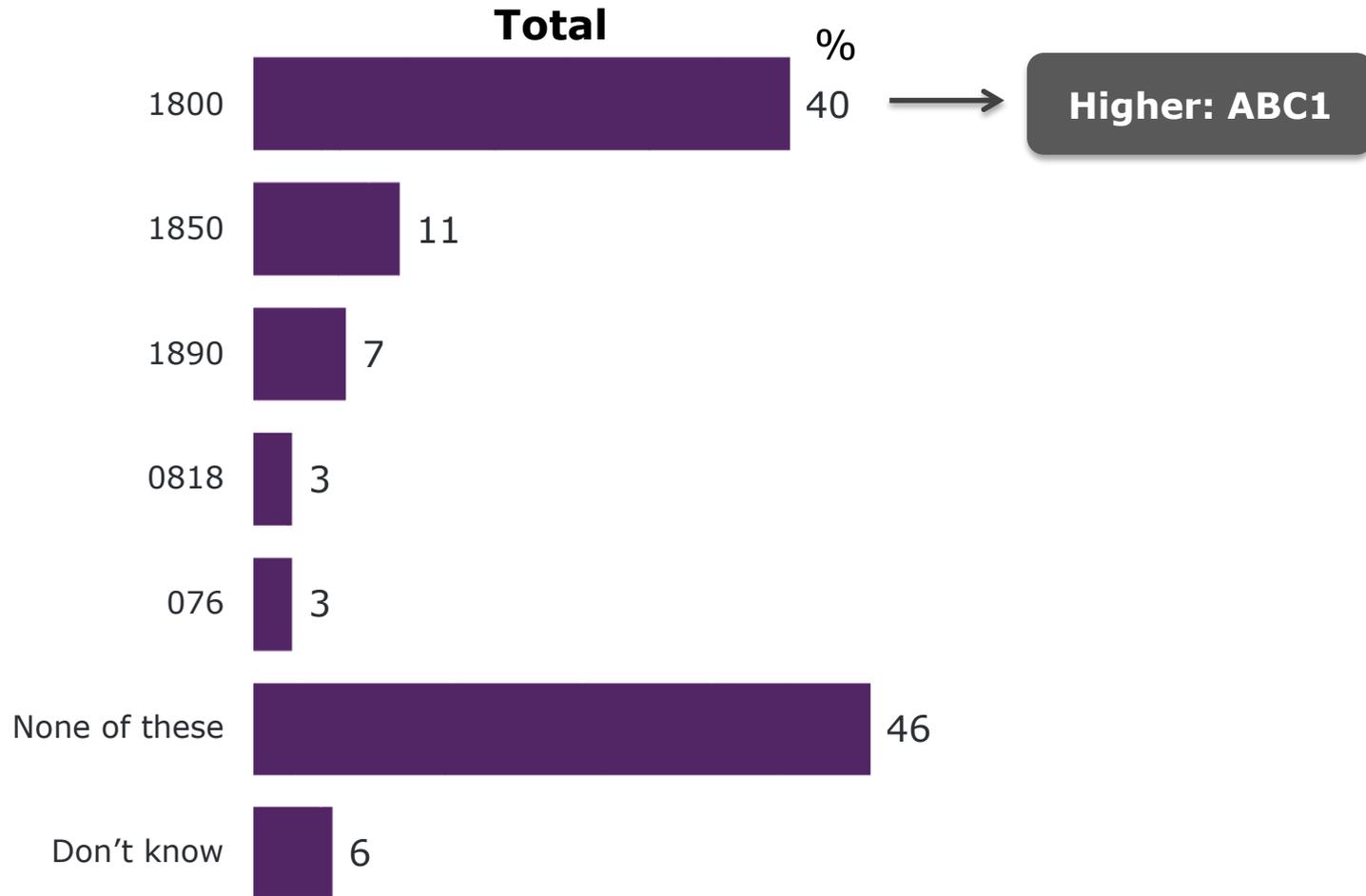
3 in 5 of those aware of NGNs do not associate any of the NGNs with being free to call from mobile. A third associate the 1800 NGN with being free to call from mobile, with this association higher among 25-34 year olds.

** Multiple responses allowed.

*** See appendix chart for data breakdown.

'Free to call from landline' by demographics

Base: All aware of NGNs (919)

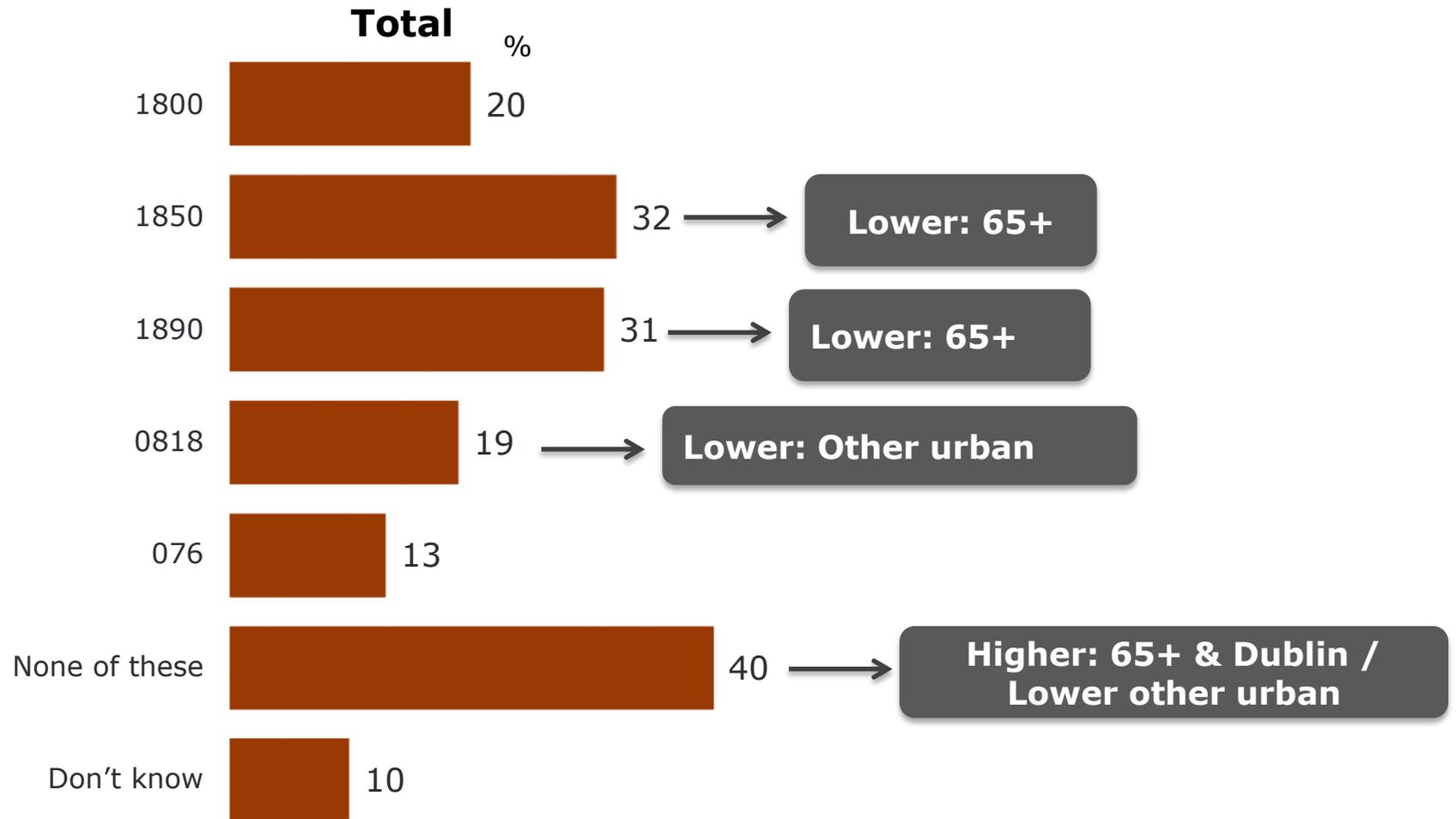


2 in 5 of those aware of NGNs associated the 1800 NGN with being free to call from landline. This association is higher among social class ABC1. However, almost half of those aware of NGNs did not associate any of the NGNs as being free to call from landline.

** Multiple responses allowed.
 *** See appendix chart for data breakdown.

'Calls are charged per call' by demographics

Base: All aware of NGNs (919)



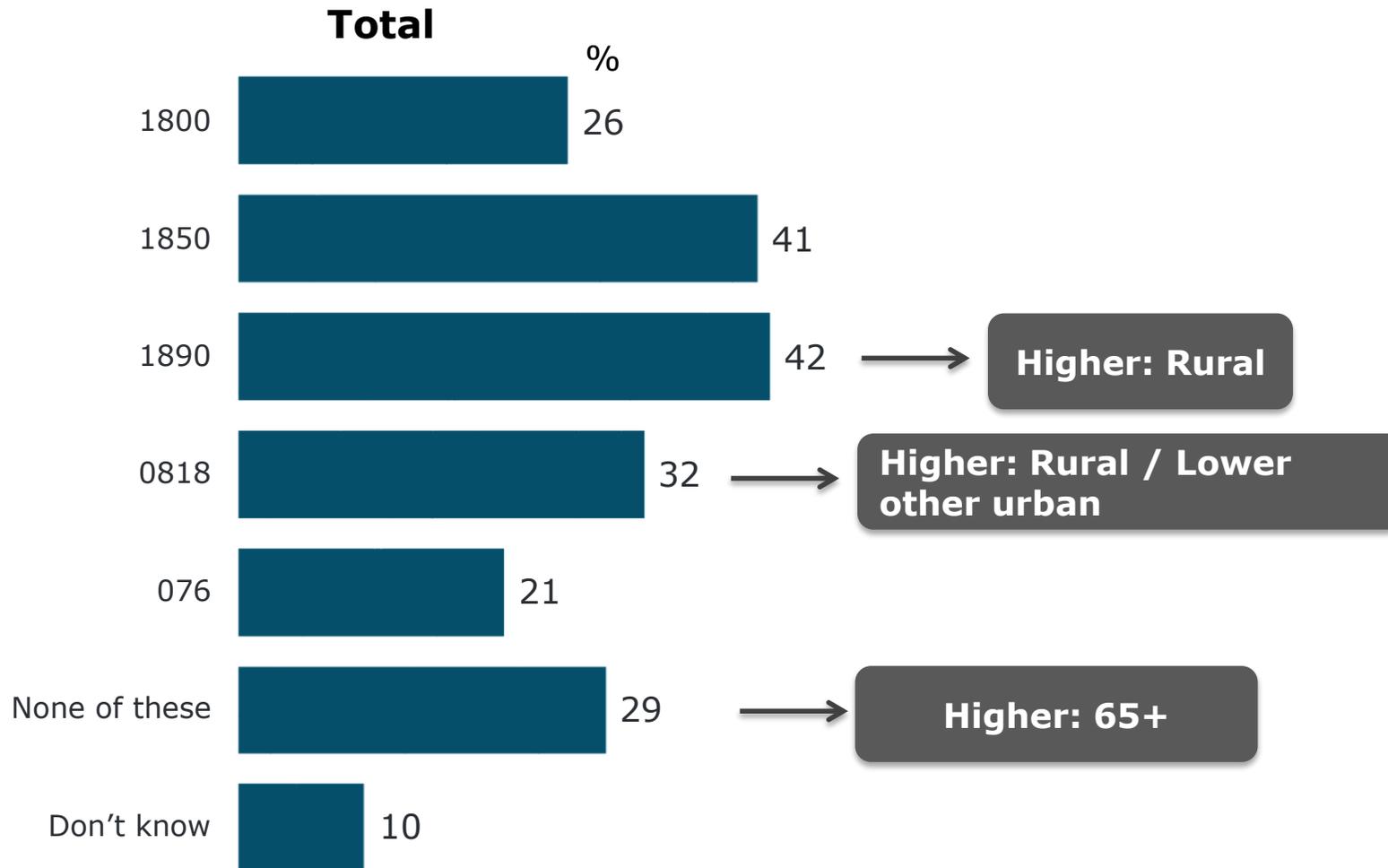
2 in 5 of those aware of NGNs did not associate any NGN with calls being charged per call and this was significantly higher among the over 65s and those in Dublin.

** Multiple responses allowed.

*** See appendix chart for data breakdown.

'Calls are charged per minute' by demographics

Base: All aware of NGNs (919)

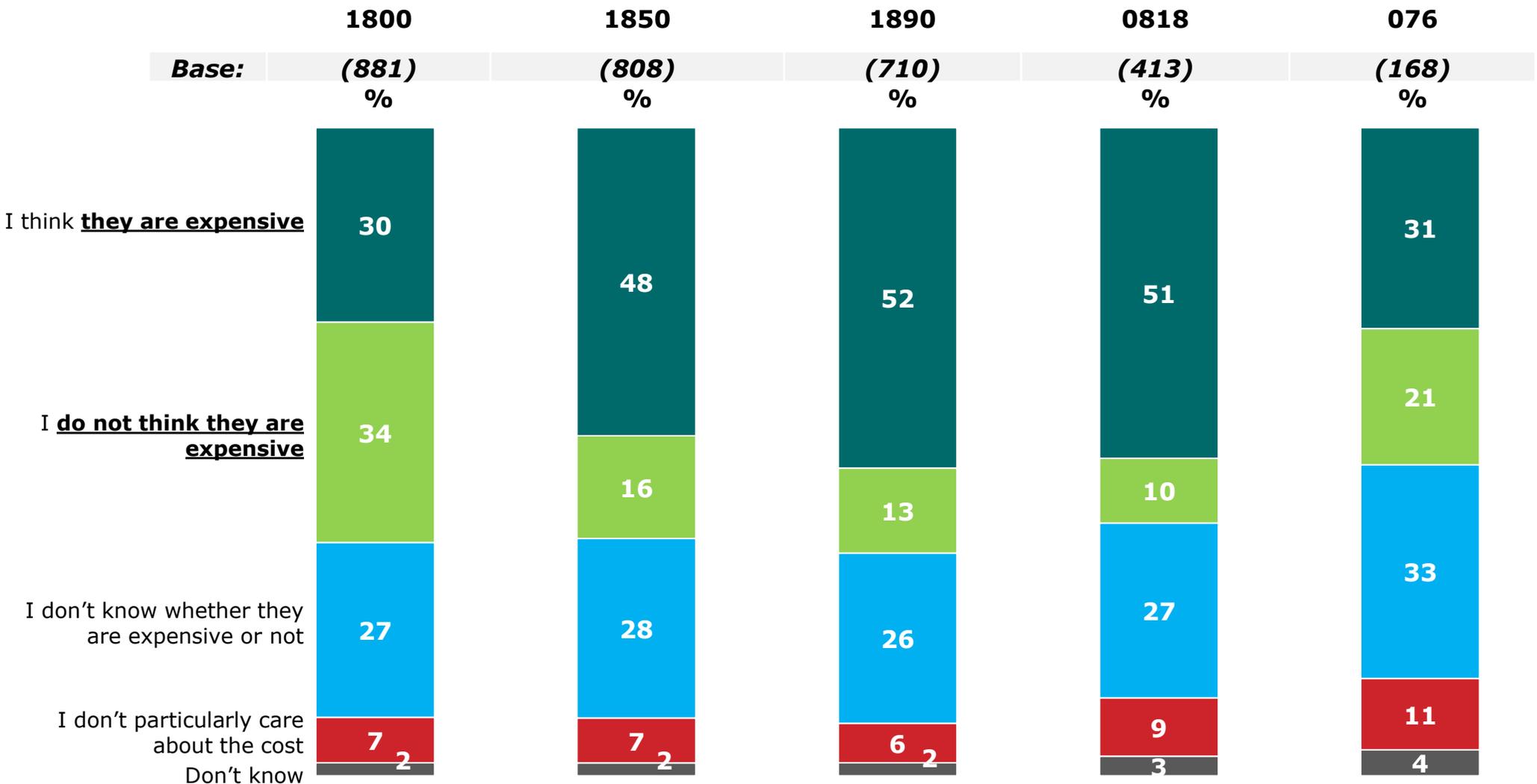


The NGNs most associated with calls being charged per minute are the 1850 and 1890 NGNs. Almost 3 in 10 did not associate any NGN with calls being charged per minute.

** Multiple responses allowed.
*** See appendix chart for data breakdown.

NGN Cost Perceptions Overview

Base: All aware of specific NGN

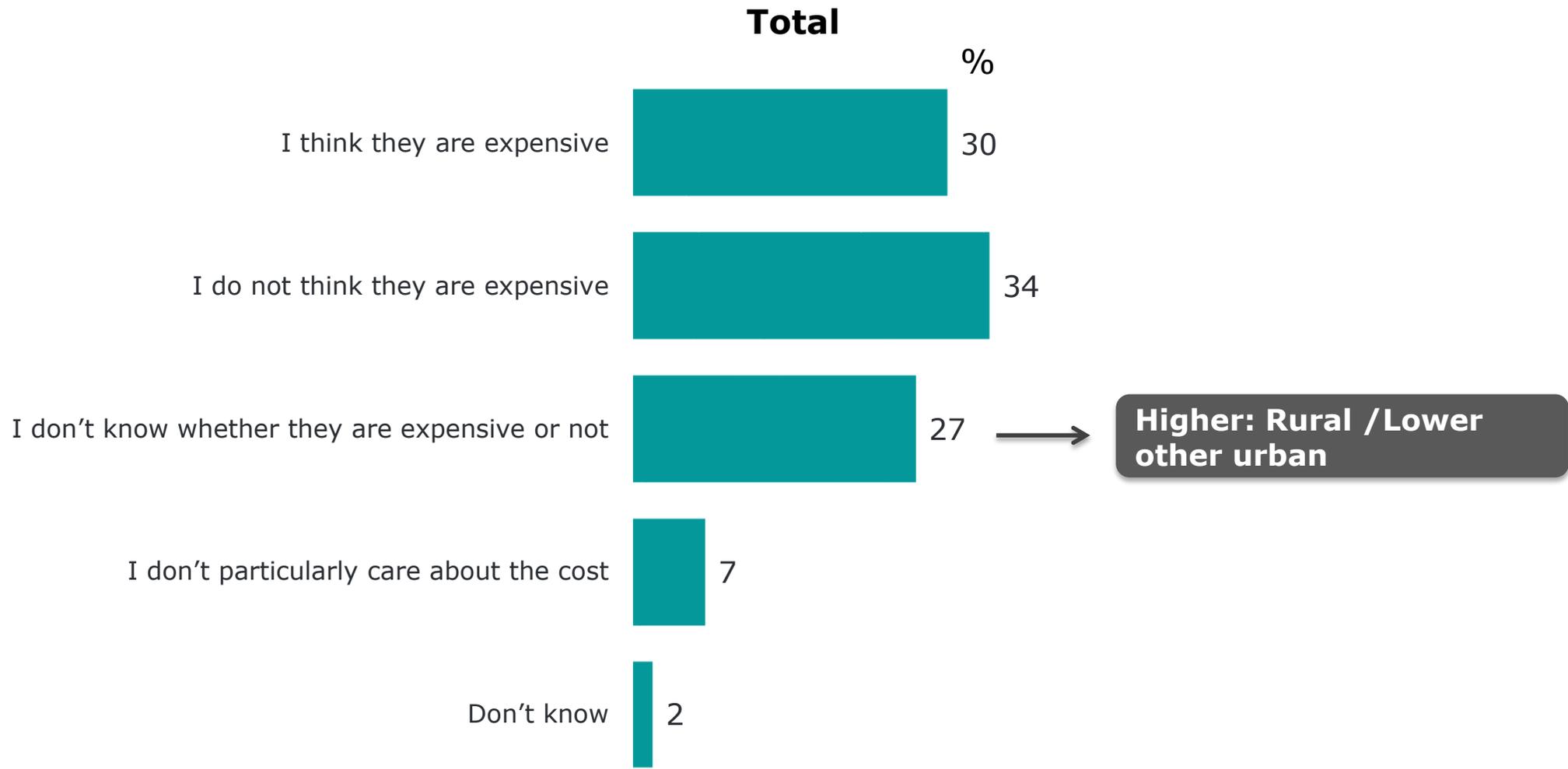


The NGNs perceived as most expensive are the 1850, 1890 and 0818 NGNs. Over a quarter to a third of those aware of each NGN do not know if calls to them are expensive or not.

** Multiple responses allowed.

NGN Cost Perceptions of calling 1800 numbers

Base: All aware of specific 1800 NGN (881)



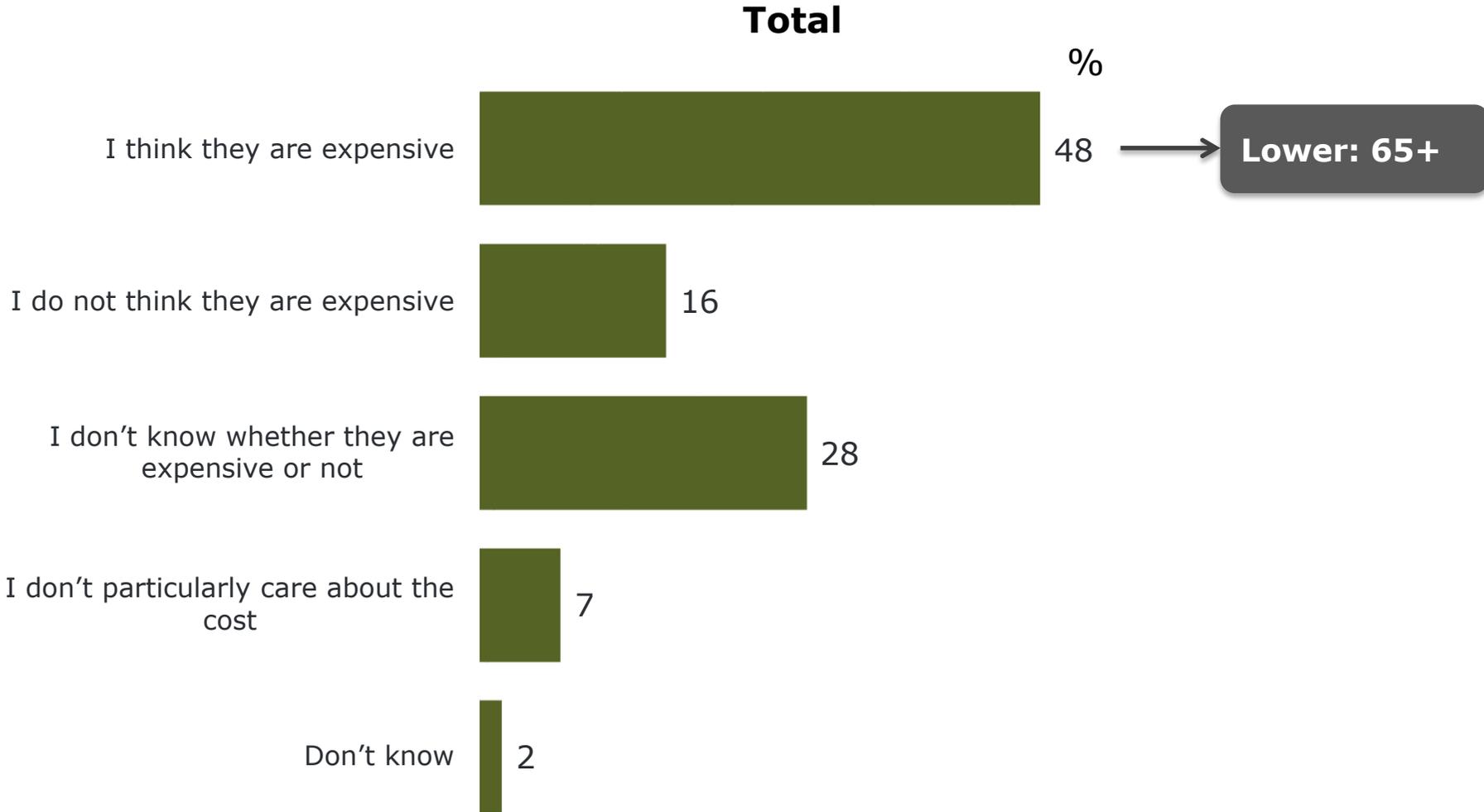
3 in 10 of those aware of 1800 NGNs think they are expensive whereas a third do not think they are expensive. Over a quarter do not know if they are expensive or not and this uncertainty is higher among those living in rural areas.

** Multiple responses allowed.
 *** See appendix chart for data breakdown.



NGN Cost Perceptions of calling 1850 numbers

Base: All aware of specific 1850 NGN (808)



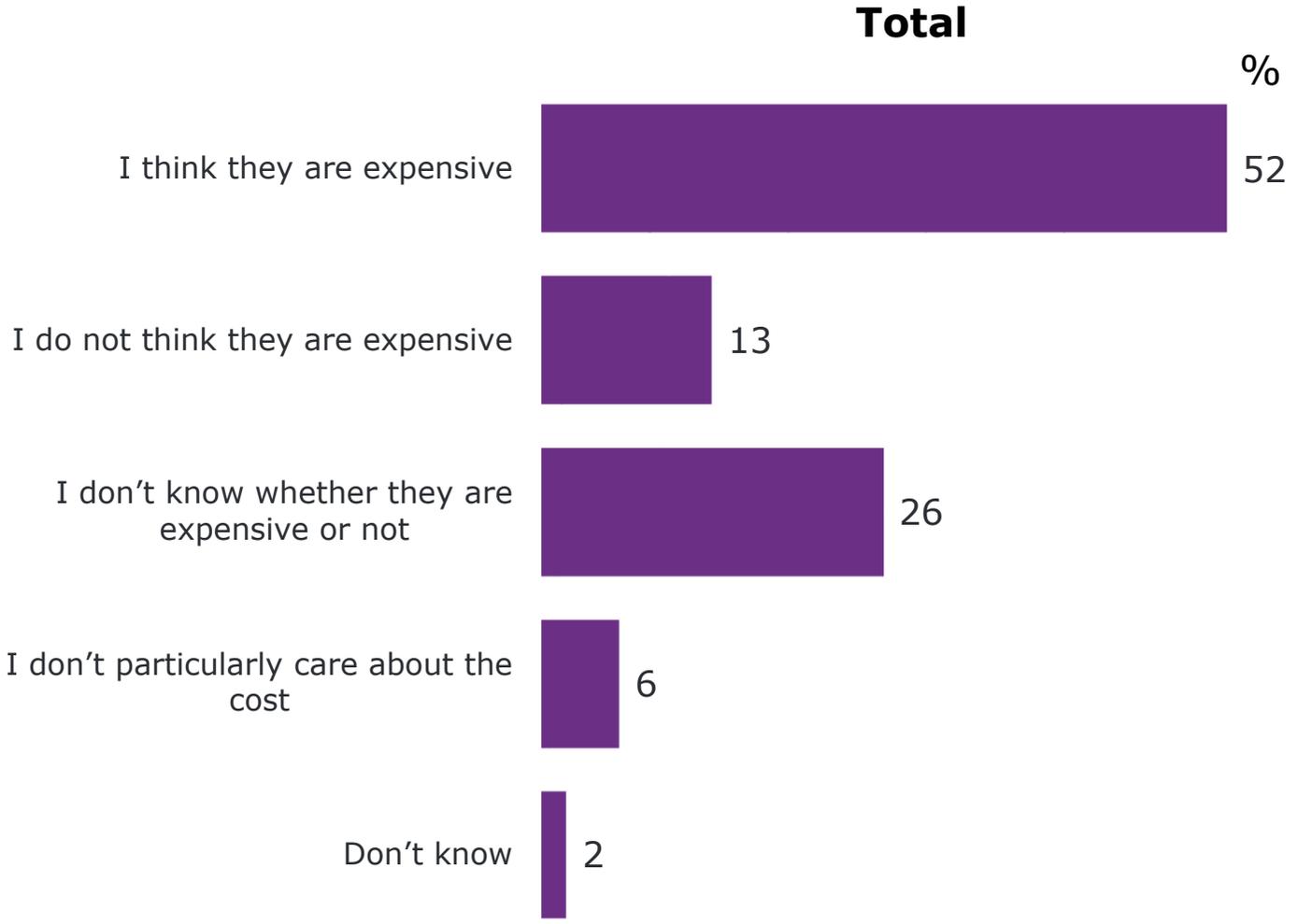
Lower: 65+

Almost half of those aware of 1850 NGNs think they are expensive but this is lower among the over 65s. Almost 3 in 10 do not know if the cost of calling 1850 numbers is expensive or not.

** Multiple responses allowed.
 *** See appendix chart for data breakdown.

NGN Cost Perceptions of calling 1890 numbers

Base: All aware of specific 1890 NGN (710)



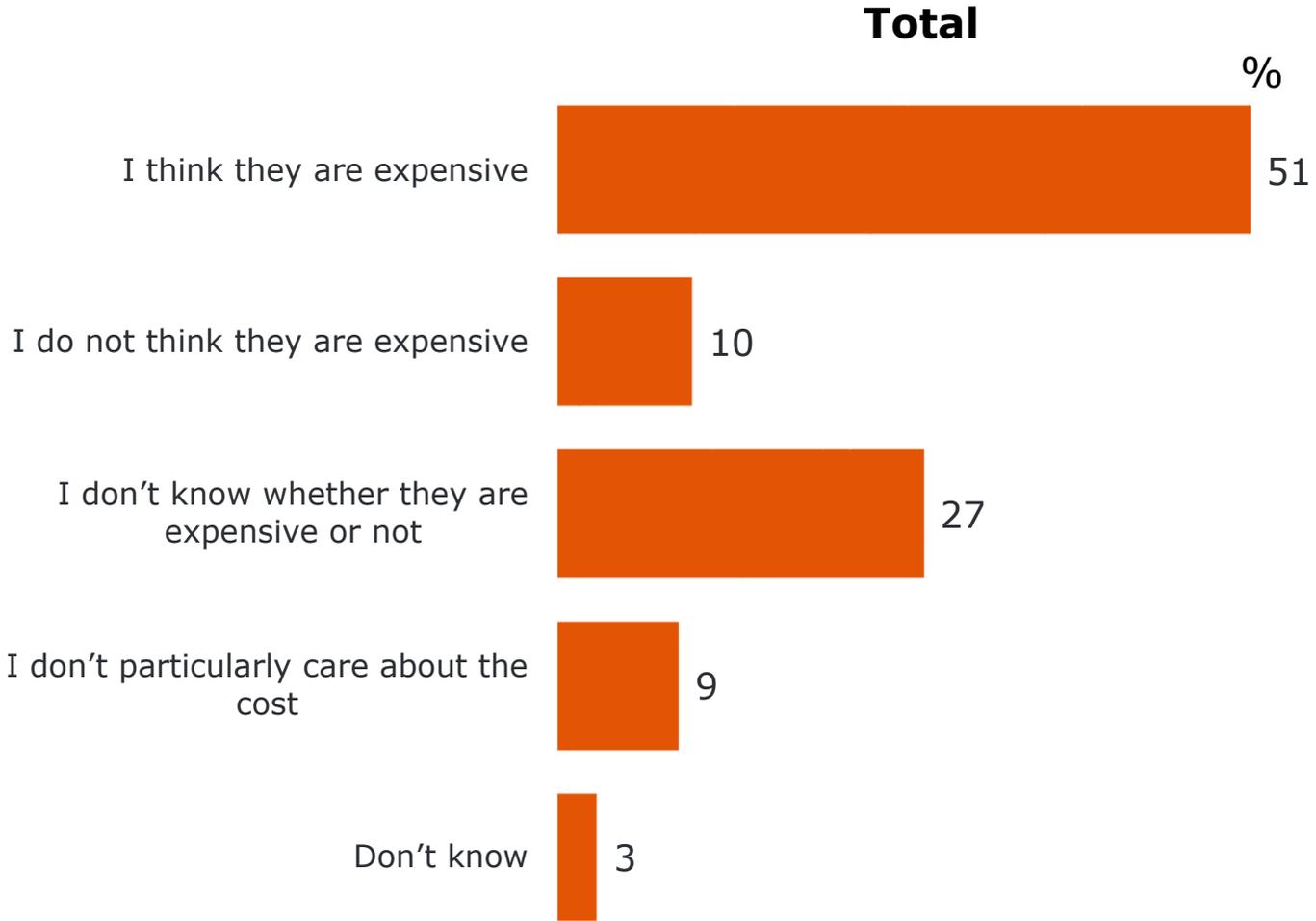
Half of those aware of 1890 NGNs think they are expensive but a quarter do not know if they are expensive or not.

** Multiple responses allowed.
*** See appendix chart for data breakdown.



NGN Cost Perceptions of calling 0818 numbers

Base: All aware of specific 0818 NGN (413)



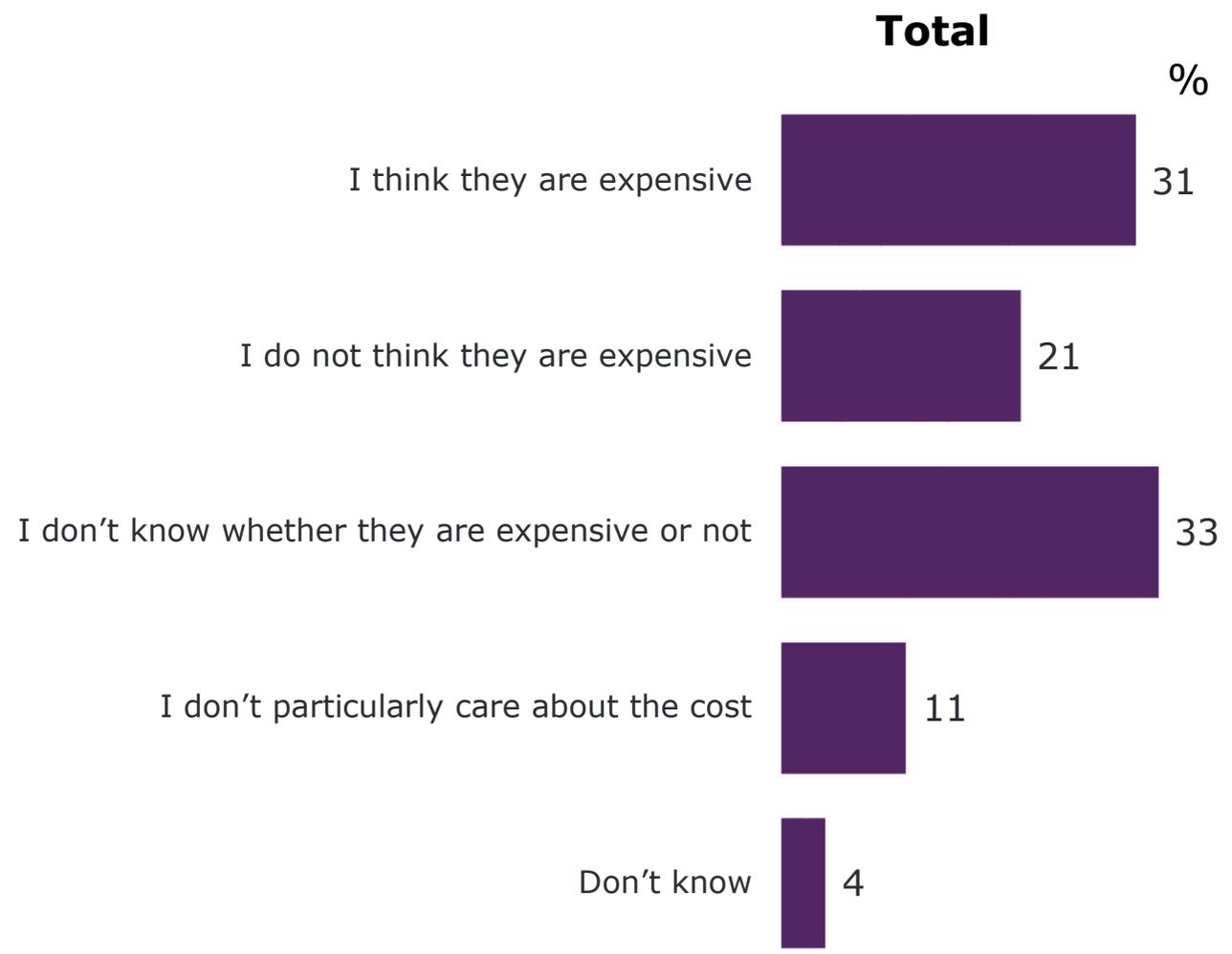
Half of those aware of 0818 NGNs think they are expensive but over a quarter do not know if they are expensive or not.

** Multiple responses allowed.
*** See appendix chart for data breakdown.



NGN Cost Perceptions of calling 076 numbers

Base: All aware of specific 076 NGN (168)



3 in 10 of those aware of 076 NGNs think they are expensive but a third do not know if they are expensive or not. 1 in 5 do not think 076 NGNs are expensive.

** Multiple responses allowed.
 *** See appendix chart for data breakdown.

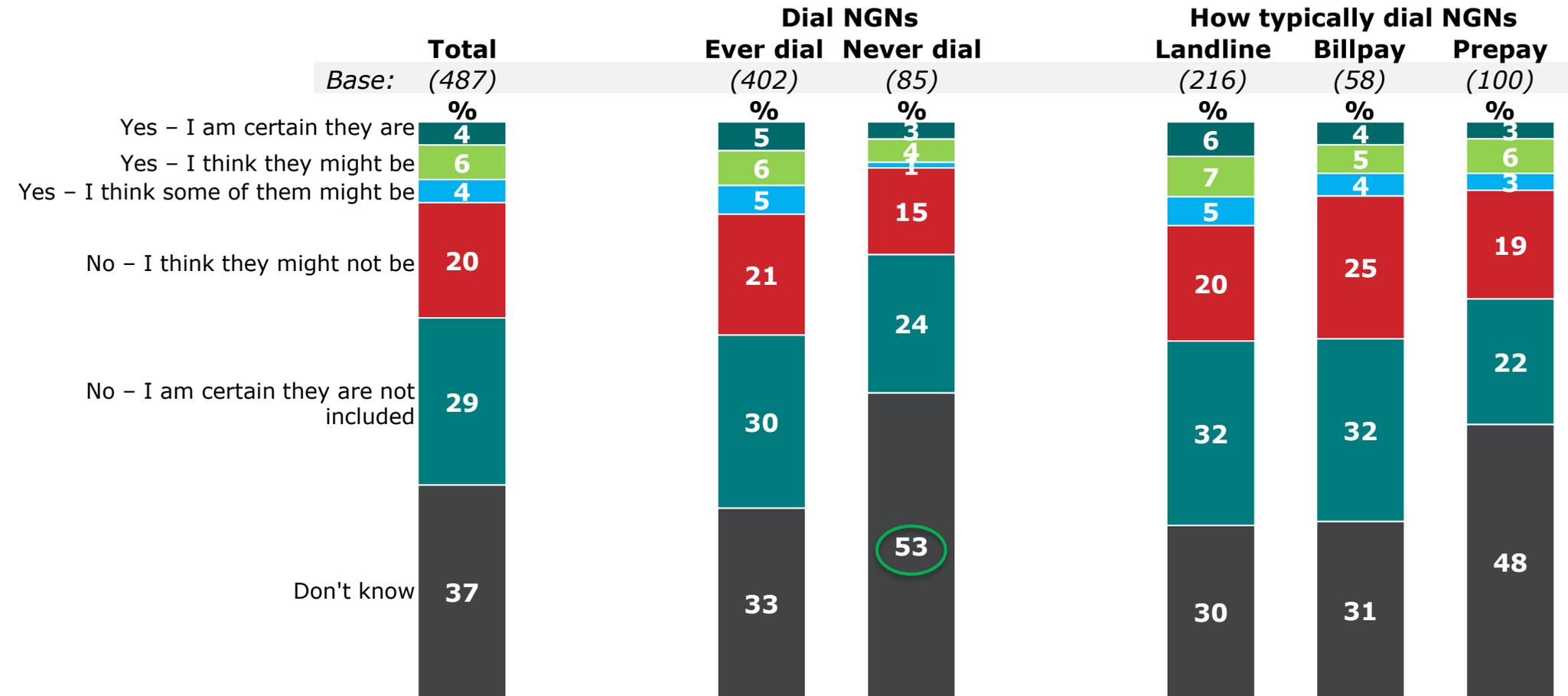
Call Packages & Costs



Awareness of calls to NGNs being included in (fixed line) call package of free telephone minutes/calls

 = Significantly higher vs total

Base: All have landline and aware of NGNs (487)

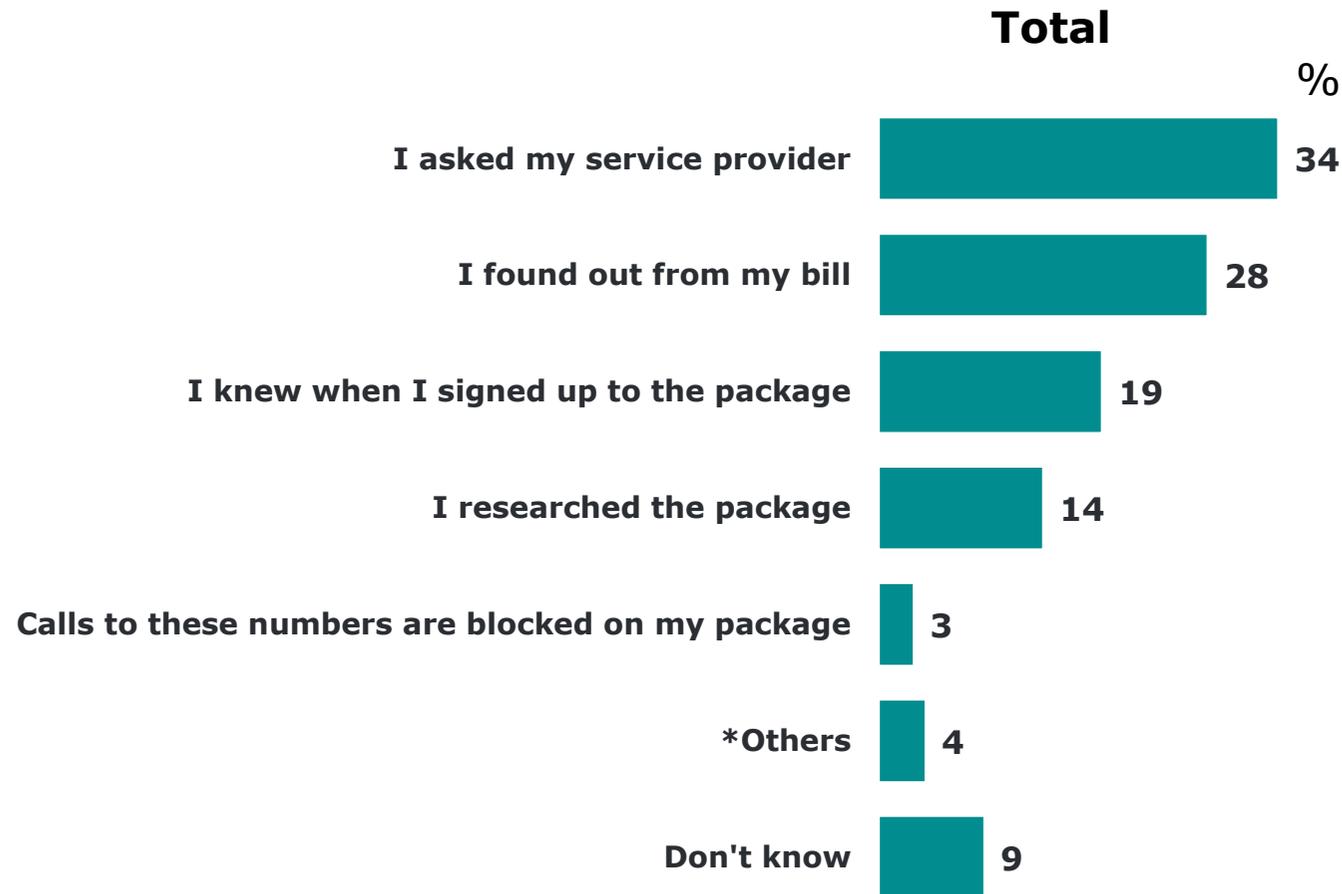


ANY Included	15		16	8		18	12	11
ANY Not Included	49		51	39		52	57	41

Half of those aware of NGNs and with a landline think or are certain that calls to NGNs are not included in their call package of free telephone minutes. 1 in 7 think NGN calls are/may be included (1 in 6 among those who ever dial NGN) while a third of those who ever dial NGNs do not know if NGN calls are included in their free telephone minutes.

How became aware that NGNs are included in landline call package

Base: All who think NGNs are included in landline call package – (72)



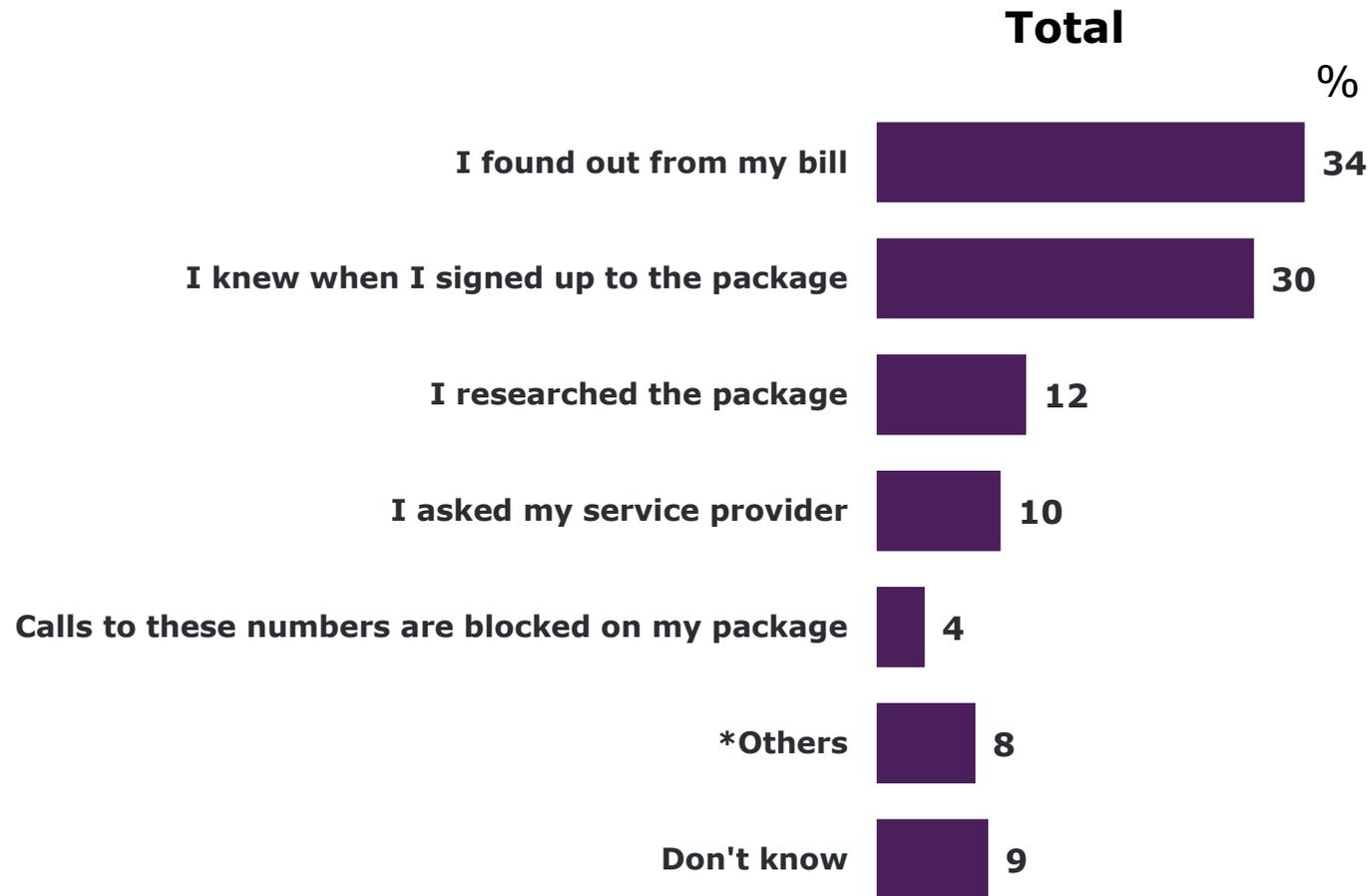
A third of those who think calls to NGNs are included in their landline call package found out by asking their service provider. 1 in 4 found out from their bill.

* All others 3% or less.

** Multiple responses allowed.

How became aware that NGNs are not included in landline call package

Base: All who think NGNs are not included in landline call package (239)



3 in 10 of those who think calls to NGNs are not included in their landline call package knew this when they signed up to the package but signed up anyway. A third found out from their bill. Over 1 in 10 researched the package.

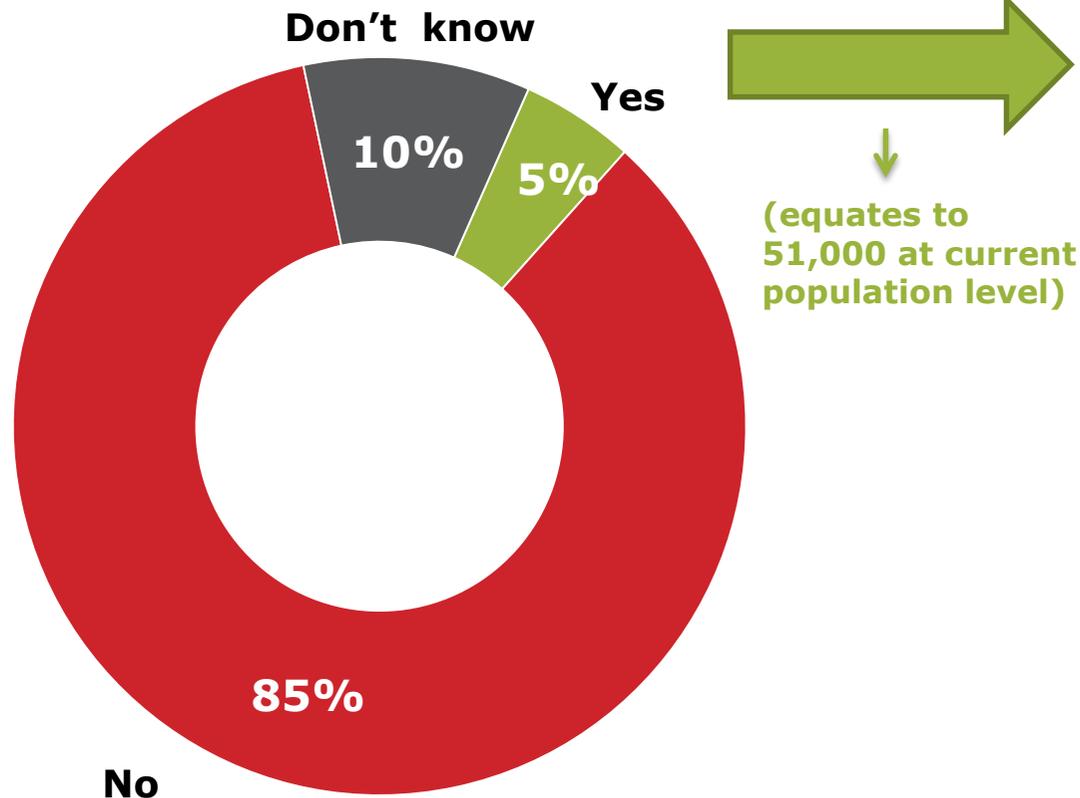
* All others 4% or less.

** Multiple responses allowed.

Importance of NGN minutes being included in landline call package

Base: All aware whether or not NGNs calls included in their call package (311)

Q.12 Did you consider the inclusion of NGN minutes in different call packages when choosing your provider/package?



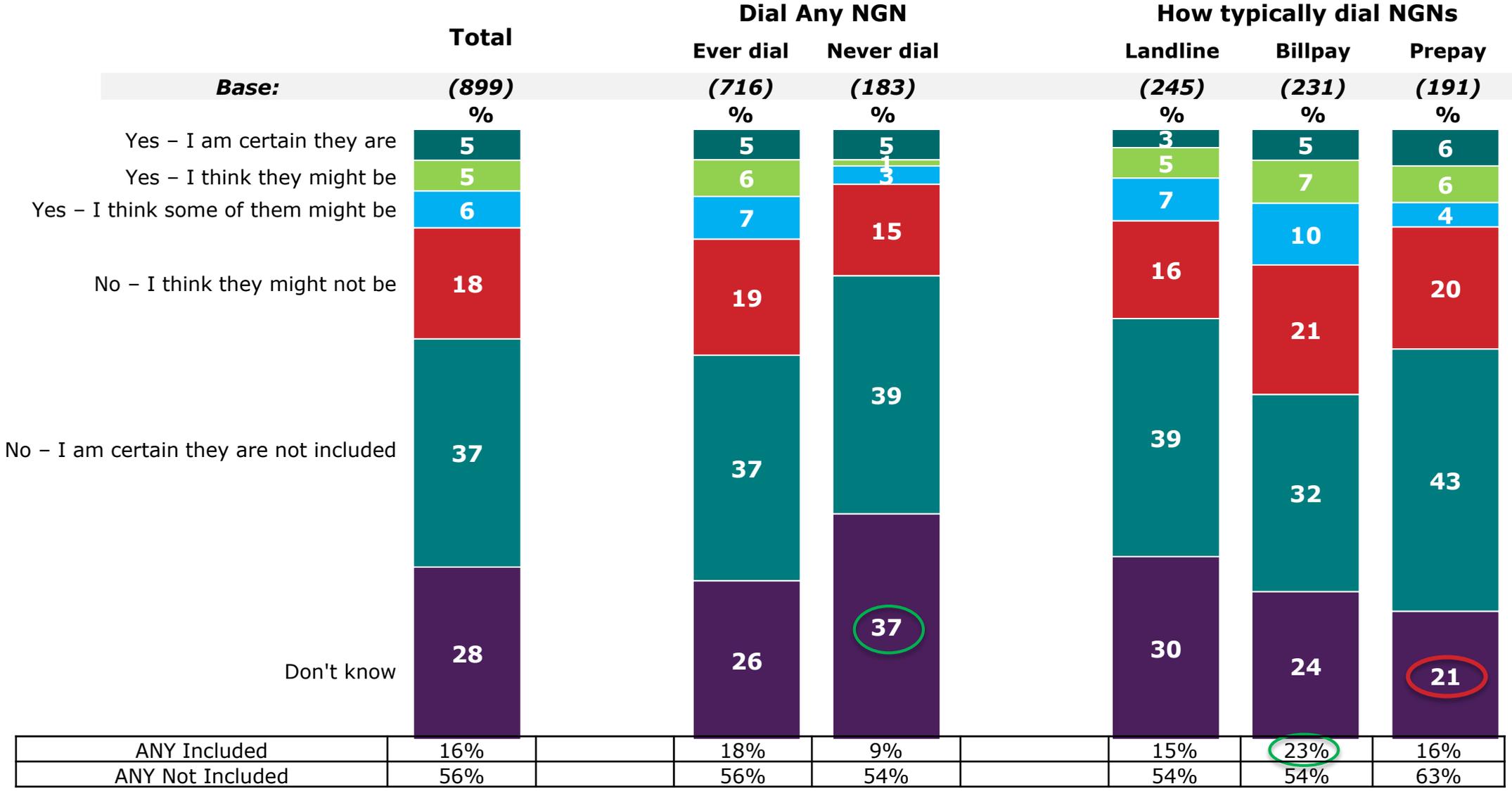
16 respondents said that they considered the inclusion of NGN minutes in different call packages when choosing their provider. Of these 10 people said that the cost of calls to NGNs was important in influencing their decision in choosing their landline provider.

Just 5% of those aware of whether or not their landline package includes calls to NGNs considered the inclusion of NGNs when choosing their provider (this increased to 7% among those who dial NGNs regularly). Of those, 10 people said that the cost of calls to NGNs was important in influencing their decision in choosing their landline provider.

Awareness of calls to NGNs being included in free mobile minutes/calls

 = Significantly higher vs total
 = Significantly lower vs total

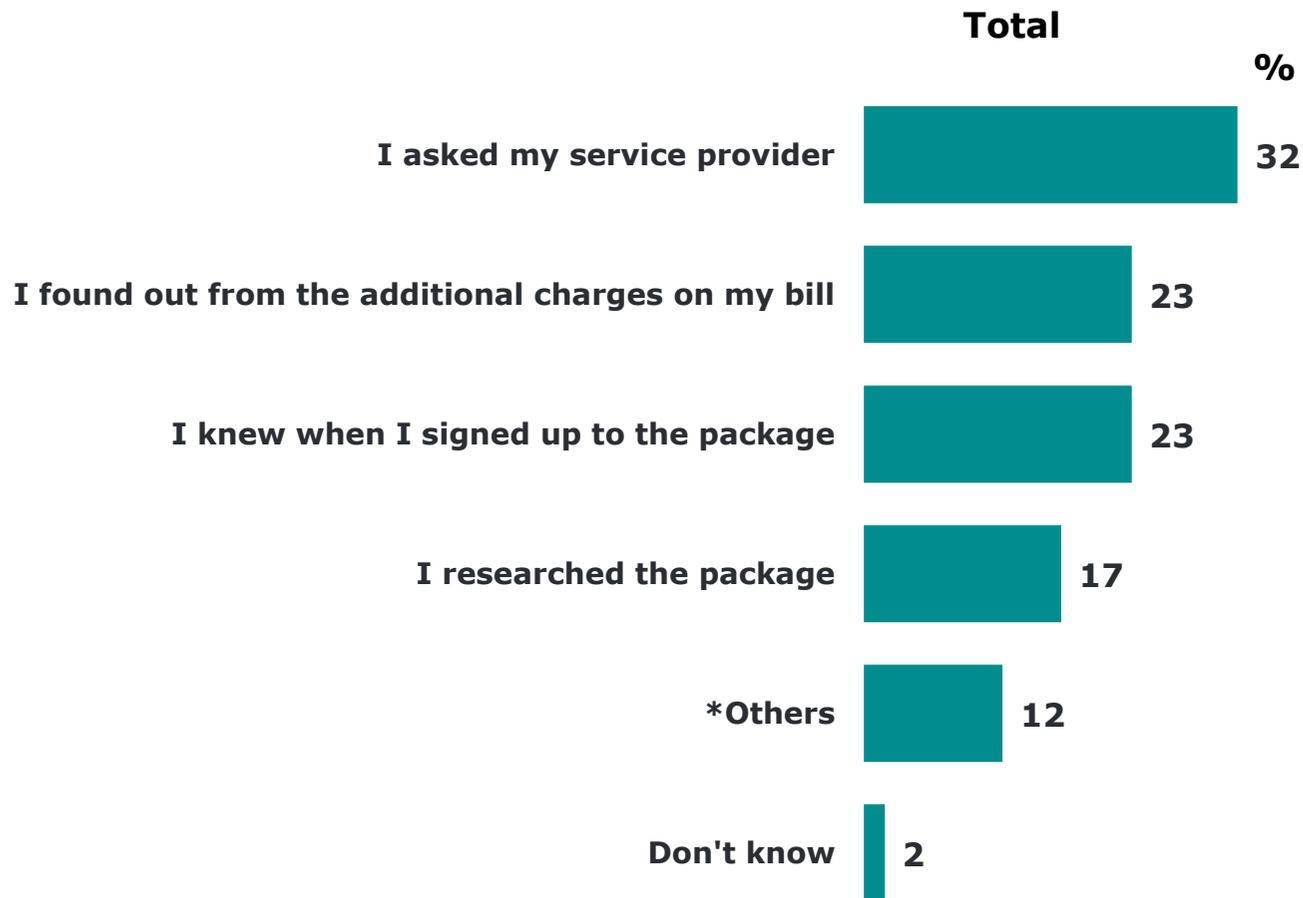
Base: All with mobile and aware of NGNs (899)



More than half of those with a mobile and aware of NGNs think or are certain that NGN calls are not included in their call package of free mobile minutes/calls. 1 in 6 think NGN calls are/may be included but a quarter of those who ever dial NGNs do not know if calls to NGNs are included.

How became aware that NGNs are included in mobile call package

Base: All who think NGNs are included in mobile call package (146)



	Billpay Mobile Base: 77 %	Prepay Mobile Base: 69 %
I asked my service provider	26	39
I found out from the additional charges on my bill	24	21
I knew when I signed up to the package	25	21
I researched the package	24	10
*Others	9	15
Don't know	1	2

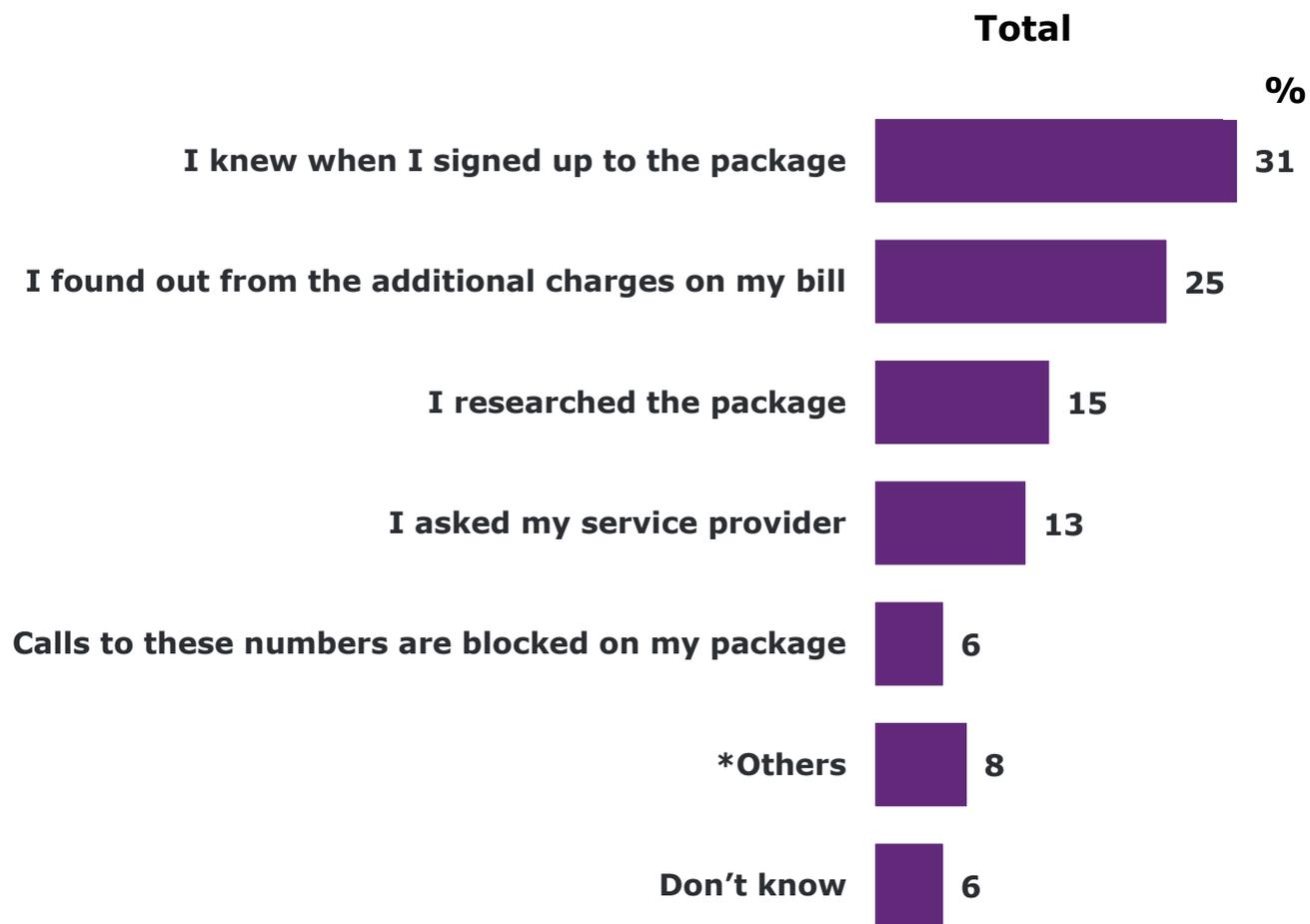
Almost a third of those who think calls to NGNs are included in their mobile call package found out by asking their service provider. Almost 1 in 4 found out from additional charges on their bill or when they signed up to the package.

* All others 3% or less.
** Multiple responses allowed.

How became aware that NGNs are not included in mobile call package

Base: All who think NGNs are not included in Mobile Call Package (496)

 = Significantly higher vs total



	Billpay Mobile (227)	Prepay Mobile (269)
	%	%
I knew when I signed up to the package	33	29
I found out from the additional charges on my bill	33	20
I researched the package	14	16
I asked my service provider	14	13
Calls to these numbers are blocked on my package	3	8
*Others	7	13
Don't know	4	7

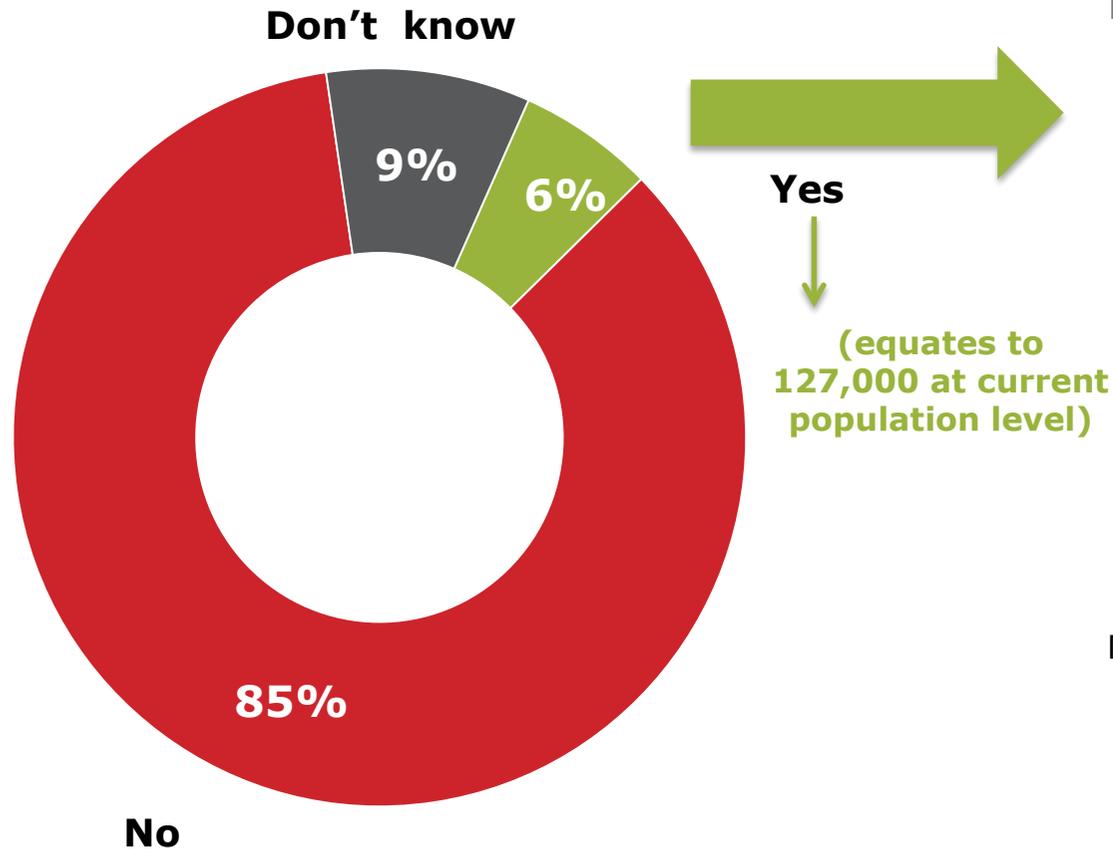
Almost a third of those who think NGN calls are not included in their mobile package knew when they signed up to the package but signed up anyway. 1 in 4 found out from additional charges on their bill and this was significantly higher among billpay mobile users.

* All others 3% or less.
** Multiple responses allowed.

Importance of NGN minutes being included in mobile phone call package

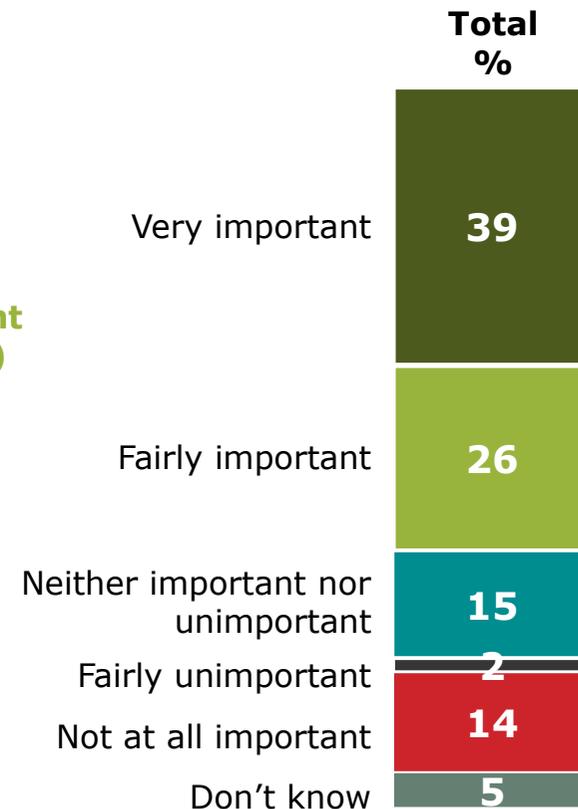
Base: All aware of NGN calls implications in mobile call package (642)

Q.15 Did you consider the inclusion of NGN minutes in different call packages when choosing your provider/package?



How important were costs of calls to NGNs in influencing your decision in choosing a mobile provider?

Base: All considered inclusion of NGN minutes (38)*



Just 6% of those aware of whether or not their mobile package includes calls to NGNs considered the inclusion of NGNs when choosing their provider. Of those, 65% claim that NGN call costs were important in choosing a mobile provider.



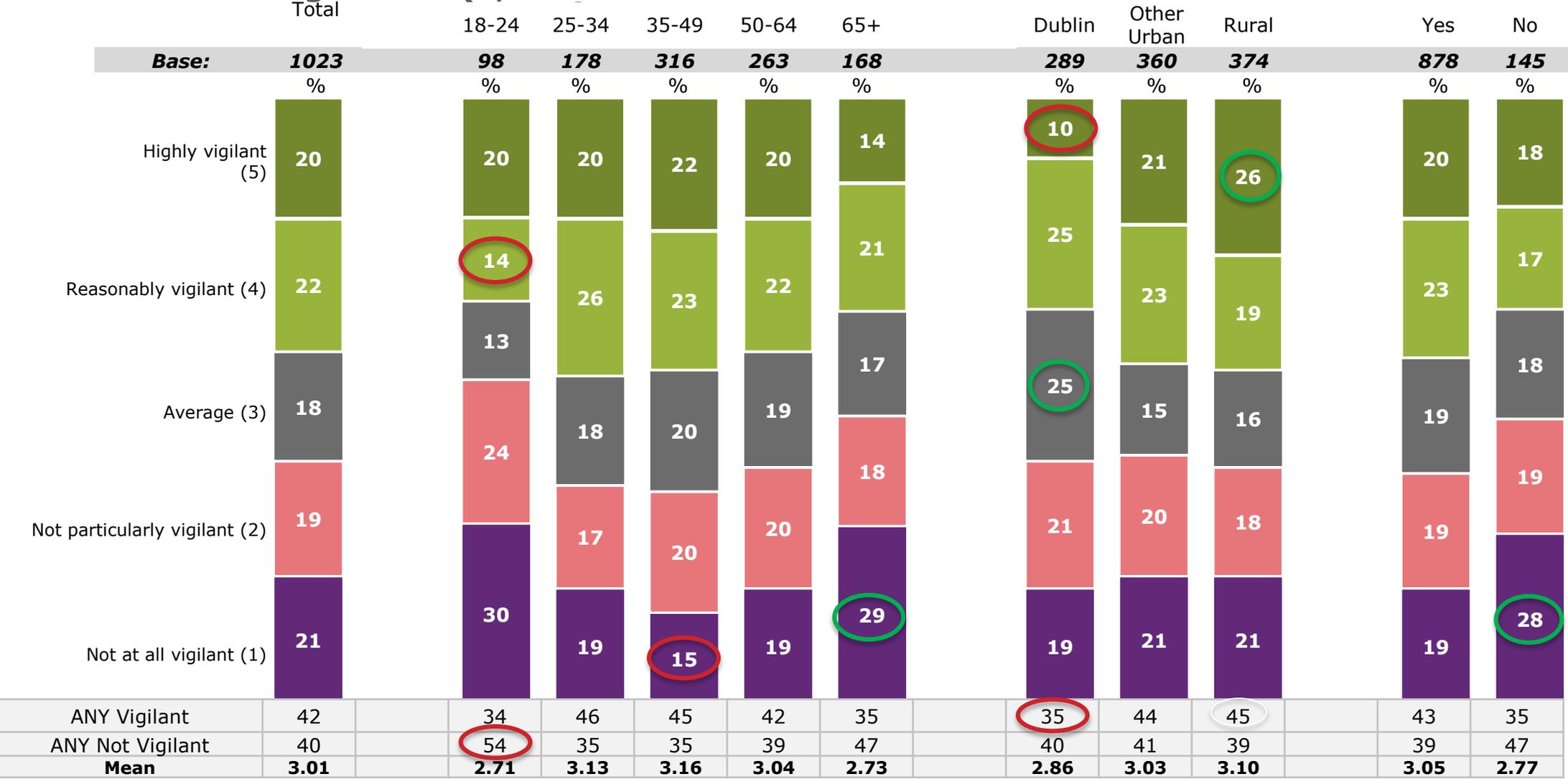
Q.15 Did you consider the inclusion of NGN minutes in different call packages when choosing your provider/package? ?

Q.15a How important were costs of calls to NGNs in influencing your decision in choosing a mobile provider?

Consumer vigilance towards costs of NGNs as part of your overall landline/mobile spending

○ = Significantly higher vs total
 ○ = Significantly lower vs total

Base: All adults aged 18+ (1,023)

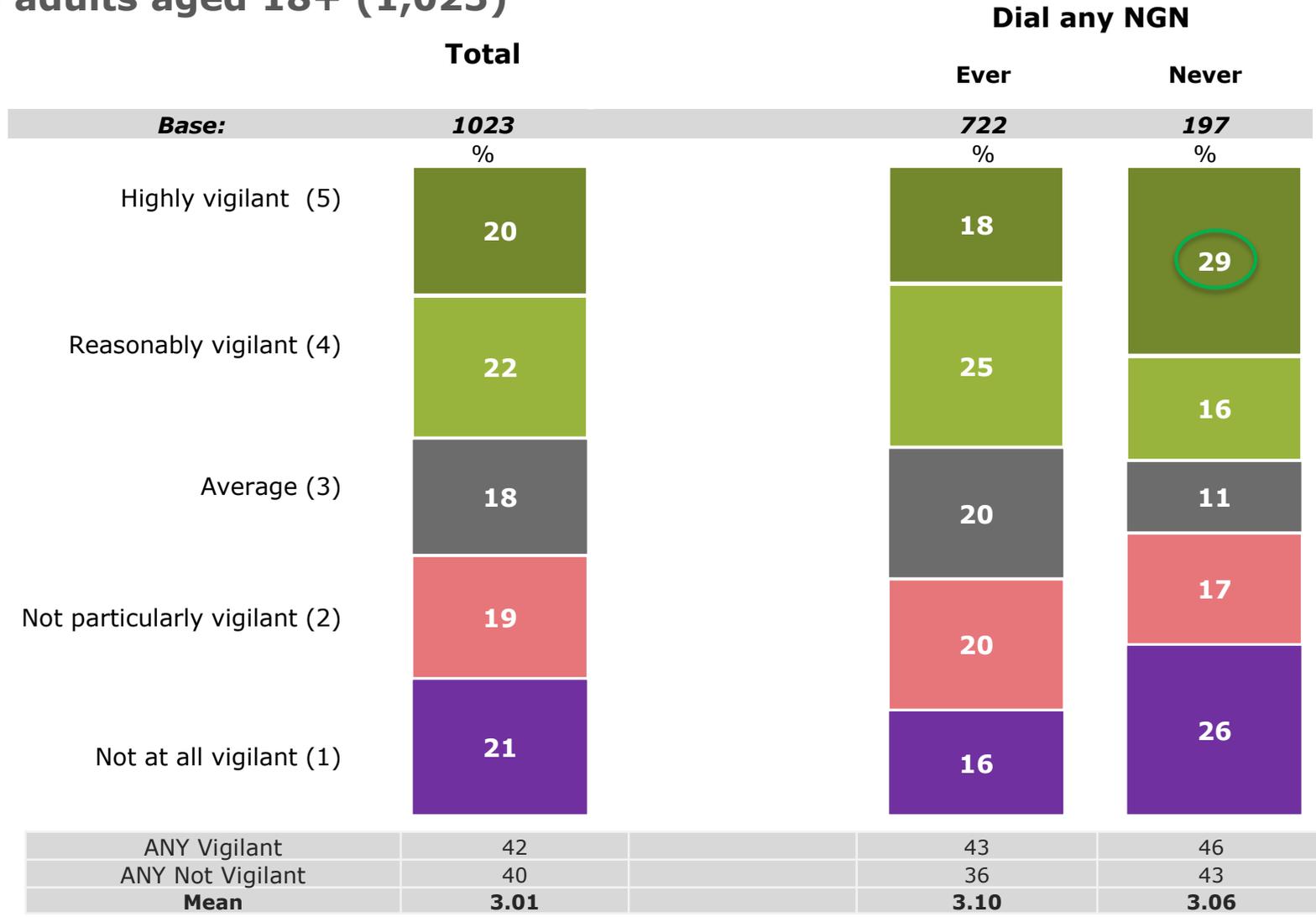


Younger and older consumers are less vigilant than other age groups about NGN costs as part of their overall telephone bill. Non-decision makers are also less vigilant about NGN costs. Those living in rural areas are significantly more vigilant about NGN costs than those in other areas.

Consumer vigilance towards costs of NGNs as part of overall landline/mobile spending

 = Significantly higher vs total
 = Significantly lower vs total

Base: All adults aged 18+ (1,023)



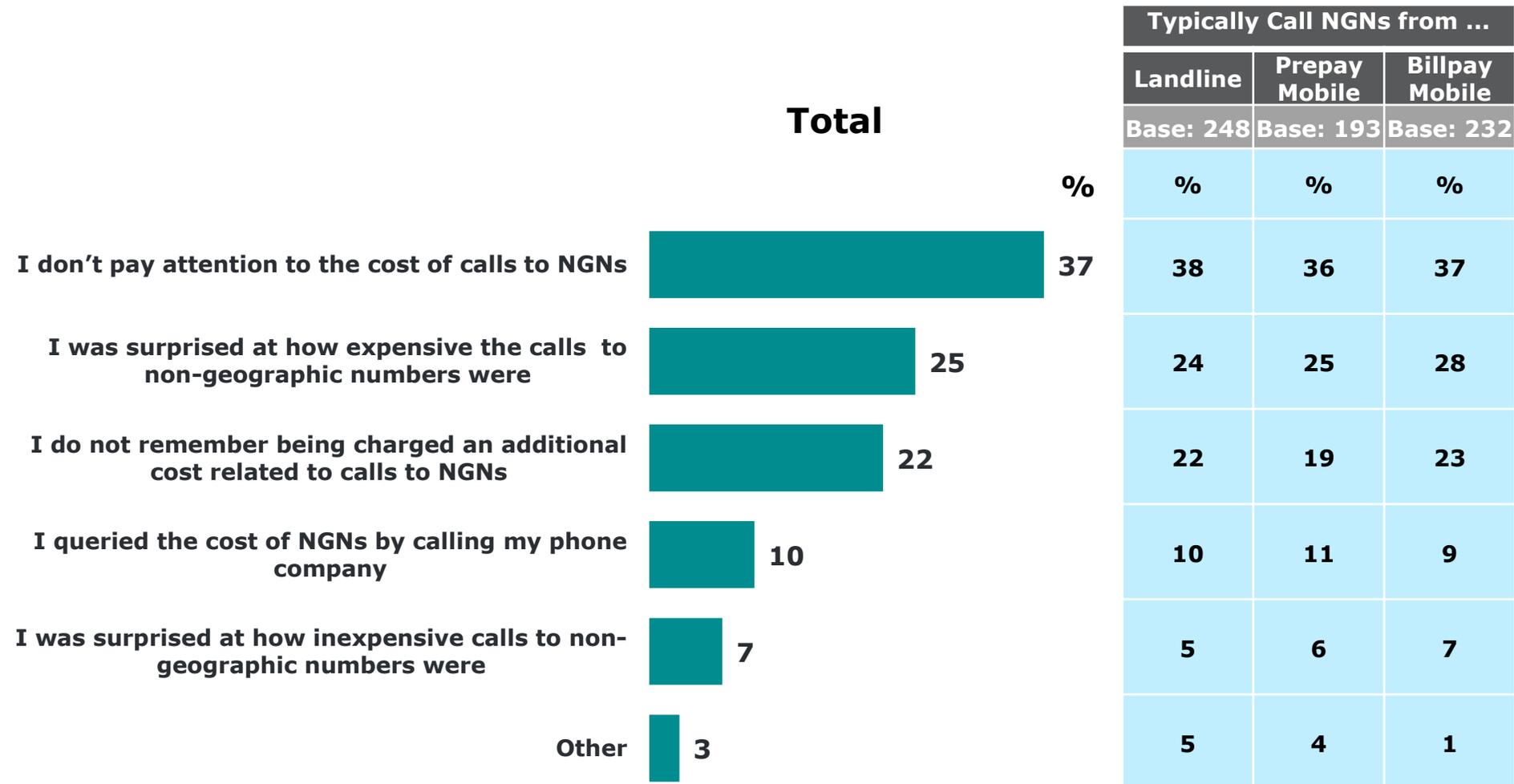
Levels of vigilance on NGN costs are fairly evenly split among those that are vigilant and those that are not. Significantly higher levels of vigilance are claimed by those who never dial NGNs.



Q.16 To what extent are you vigilant when it comes to the costs of NGNs as part of your overall landline/mobile spending e.g. do you look at how much you spend on these calls?

How consumers have felt after receiving a bill or on reviewing call costs with additional NGN costs

Base: All ever dialled NGNs (722)



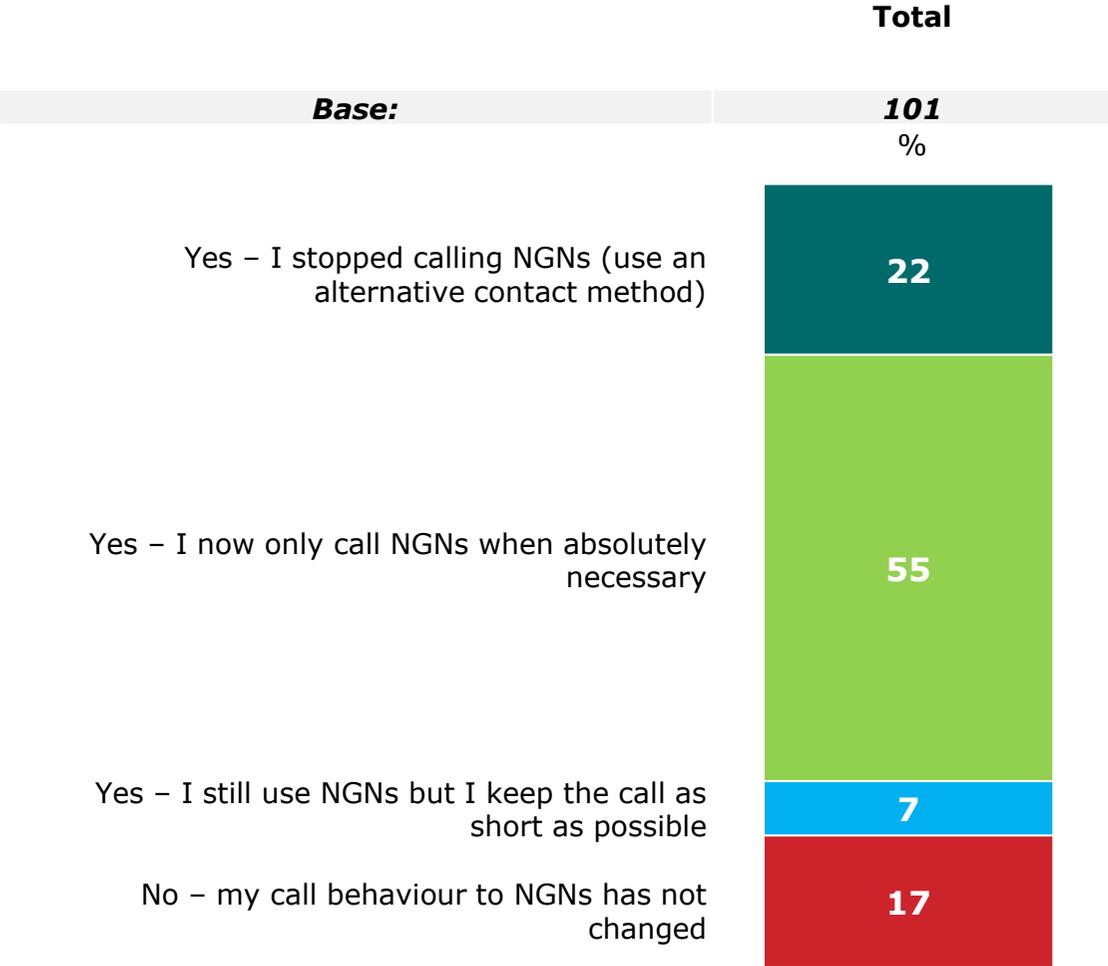
Almost 2 in 5 of those that ever dialled NGNs claim that they don't pay attention to the cost of NGN calls but one quarter was surprised at how expensive they were. 1 in 5 do not remember being charged an additional cost related to NGN calls. There is little variation across different call methods.

** Multiple responses allowed.



Impact of surprise at how expensive the calls to NGNs are and how affected landline call behaviour

Base: All surprised at expense of calls to NGNs and have a landline (101)



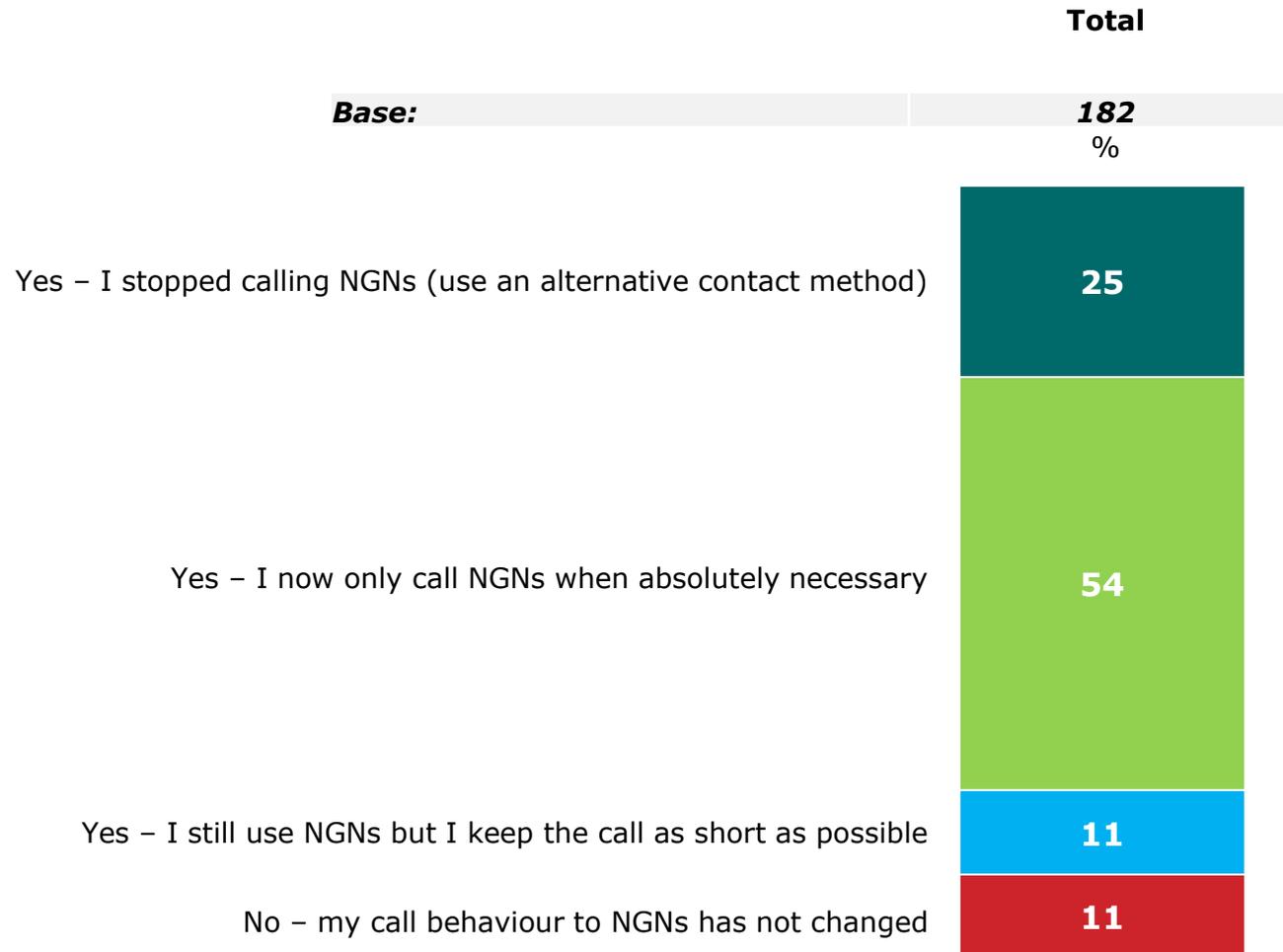
More than half of those who were surprised at the cost of calls to NGNs and have a landline now only call NGNs when absolutely necessary, while 1 in 5 stopped calling NGNs. 1 in 6 did not change their call behaviour to NGNs.



Q.18 You mentioned you were surprised at how expensive the calls to non-geographic numbers (NGNs) were, did this affect your landline call behaviour to these numbers in any way?

Impact of surprise at how expensive the calls to NGNs are and how affected mobile call behaviour

Base: All surprised at expense of calls to NGNs and have mobile (182)



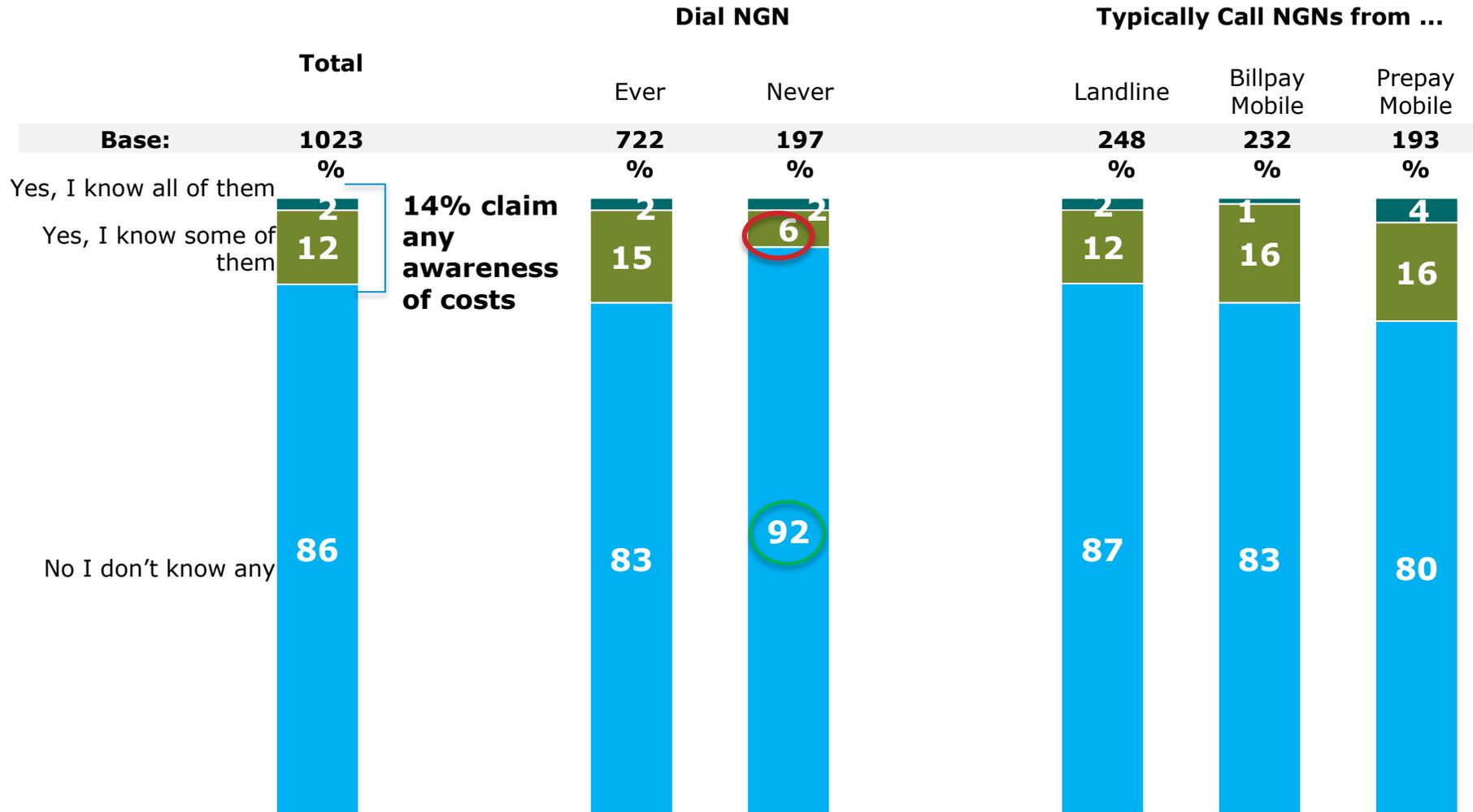
More than half of those who were surprised at the cost of calls to NGNs and have a mobile now only call NGNs when absolutely necessary, while 1 in 4 stopped calling NGNs. 1 in 10 did not change their call behaviour to NGNs.



Awareness of costs per minute/per call when making calls to NGNs

 = Significantly higher vs total
 = Significantly lower vs total

Base: All adults aged 18+ (1,023)



The majority of adults do not know the cost per minute/per call when making calls to NGNs. Just 1 in 7 consumers claim any awareness of NGN call costs. Higher NGN cost awareness is claimed by those who ever dial NGNs than those who never dial them.



Q. 19 Do you know how much it costs you per minute/per call when making calls to NGNs (in the case that they are not included in your call package, or calls are made out of bundle)?

Awareness of costs per minute/per call when making calls to NGNs by demographics

Base: All adults aged 18+ (1,023)



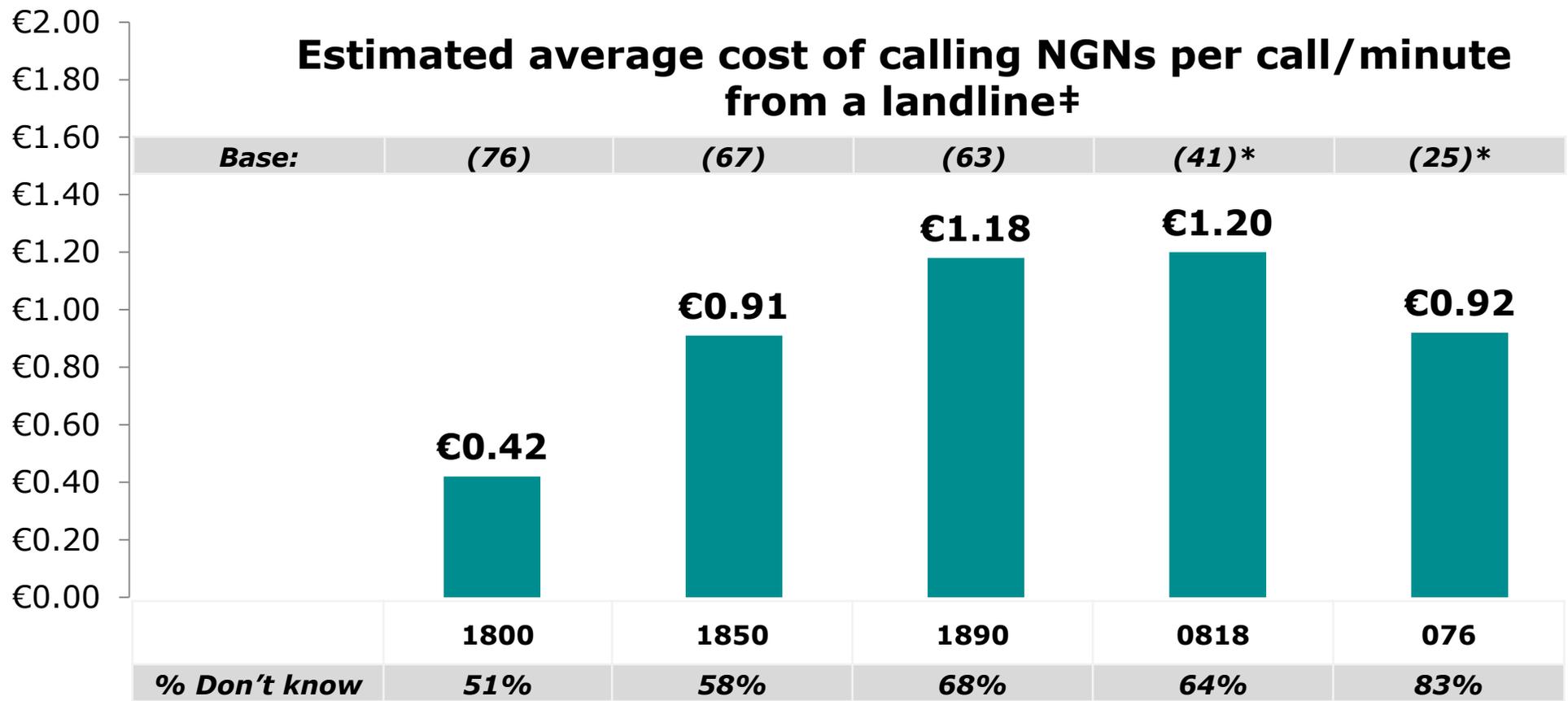
The majority of adults do not know the per minute/per call costs of making calls to NGNs. This is significantly higher among the over 65s.

*** See appendix chart for data breakdown.



Estimated NGN call costs from a landline during business hours

Base: All who have landline and claim to know cost of call/minutes to some or all NGNs



The majority of those with a landline and who claimed to know the cost of calls to some or all NGNs did not know the costs of calling the different NGNs from a landline during business hours. The estimated average cost of calling 1800 NGNs from a landline during business hours is €0.42 per minute. 0818 NGNs are estimated to be the most expensive to call from a landline during business hours.

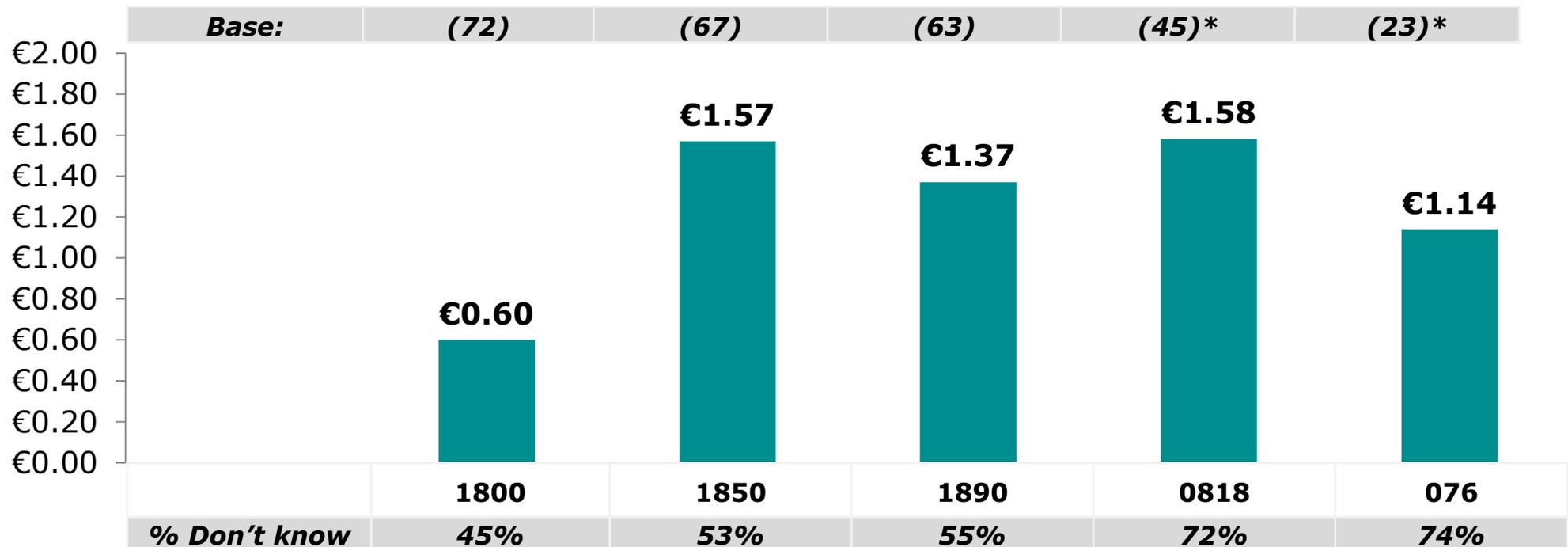
* Caution small base size.
 ‡ Estimated cost is the average amount across all who provided a value including free.



Estimated NGN call costs from a billpay mobile during business hours

Base: All who have billpay mobile and claim to know cost of call/minutes to some or all NGNs

Estimated Average cost of calling NGNs from a Billpay Mobile ‡



Almost half to three quarters of those with a billpay mobile and who claimed to know the cost of calls to some or all NGNs did not know the costs of calling the different NGNs from a billpay mobile during business hours. The estimated average cost of calling 1800 NGNs from a billpay mobile during business hours is €0.60 per minute. The 0818 and 1850 NGNs are estimated to be the most expensive to call from a billpay mobile during business hours.

* Caution small base size.

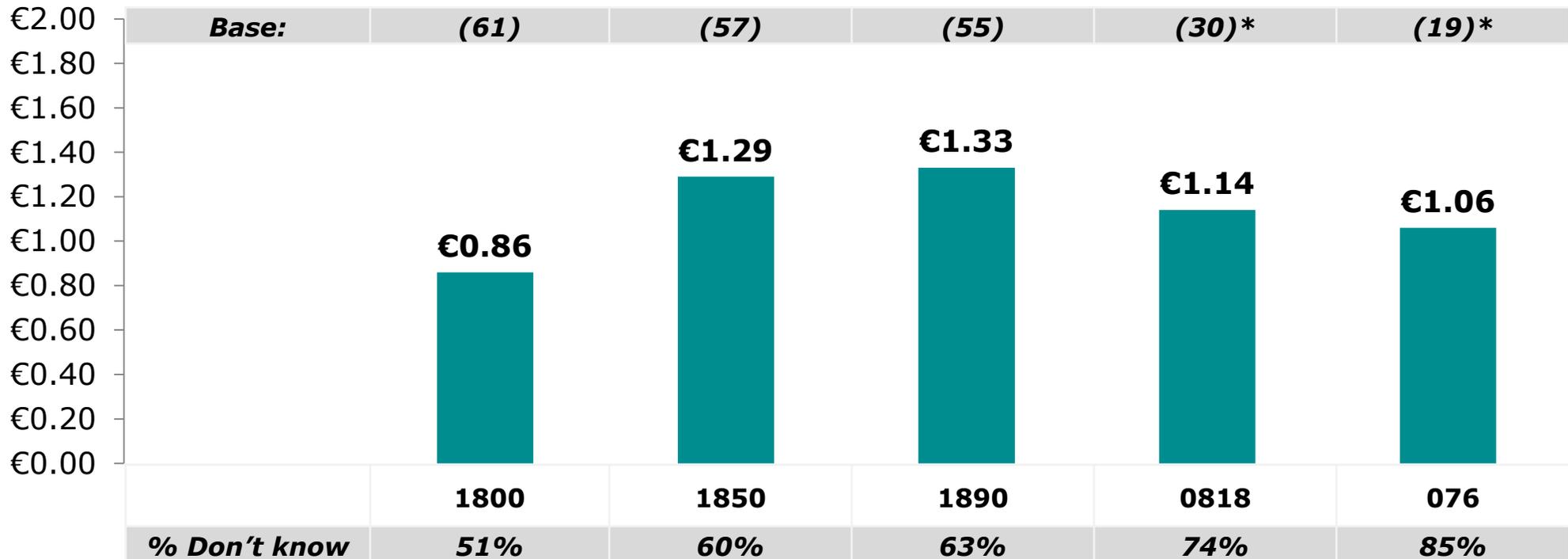
‡ Estimated cost is the average amount across all who provided a value including free.



Estimated NGN call costs from a prepay mobile during business hours

Base: All who have prepay mobile and claim to know cost of call/minutes to some or all NGNs

Estimated Average cost of calling NGNs from a Prepay Mobile‡



The majority of those with a prepay mobile and claiming to know some or all of the cost of calls to NGNs did not know the costs of calling the different NGNs from a prepay mobile during business hours. Calls to 1890 and 1850 NGNs are perceived the most expensive to call from a prepay mobile during business hours. The estimated average cost of calling 1800 NGNs from a prepay mobile during business hours is €0.86 per minute. The estimated average costs of calling all NGNs other than 1800 from a prepay mobile are lower than the estimates of calling from a billpay mobile.

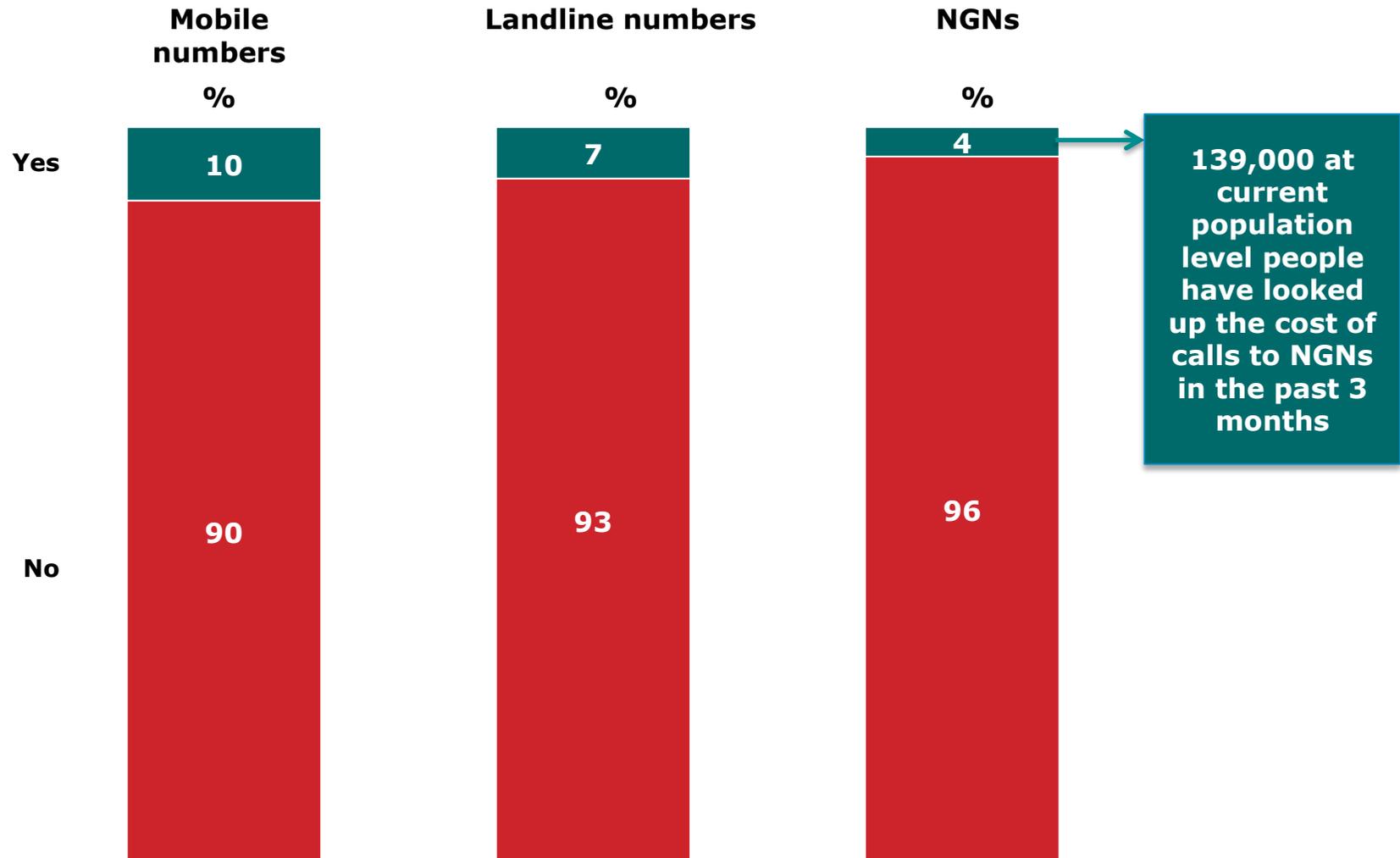
* Caution small base size.

‡ Estimated cost is the average amount across all who provided a value including free.



Incidence of looking up the cost of calls in past 3 months

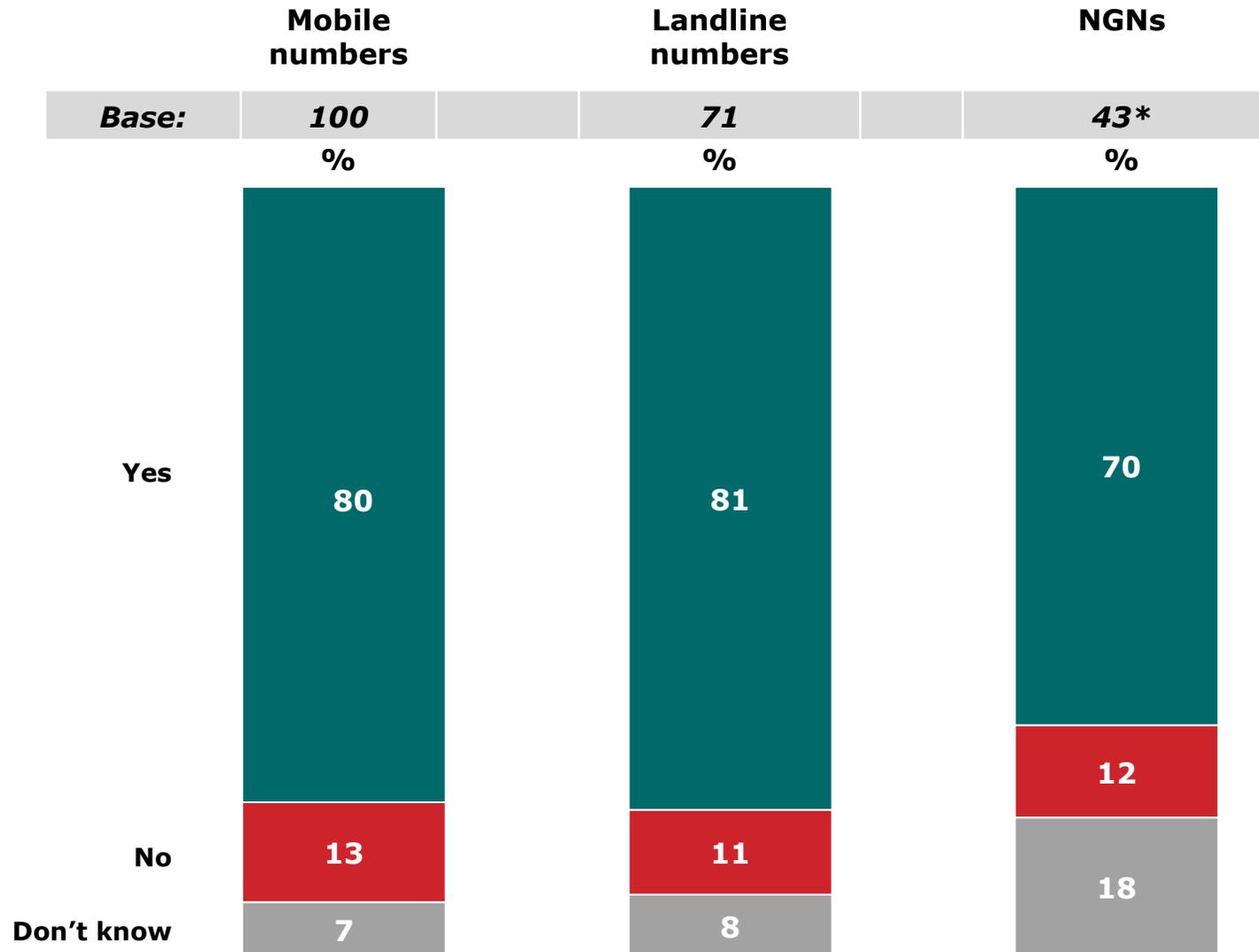
Base: All adults aged 18+ (1,023)



Low incidence of looking up the cost of calls across the board, with the lowest incidence of looking up call costs for NGNs.

Incidence of finding the cost information you were looking for on last occasion

Base: All looked up costs

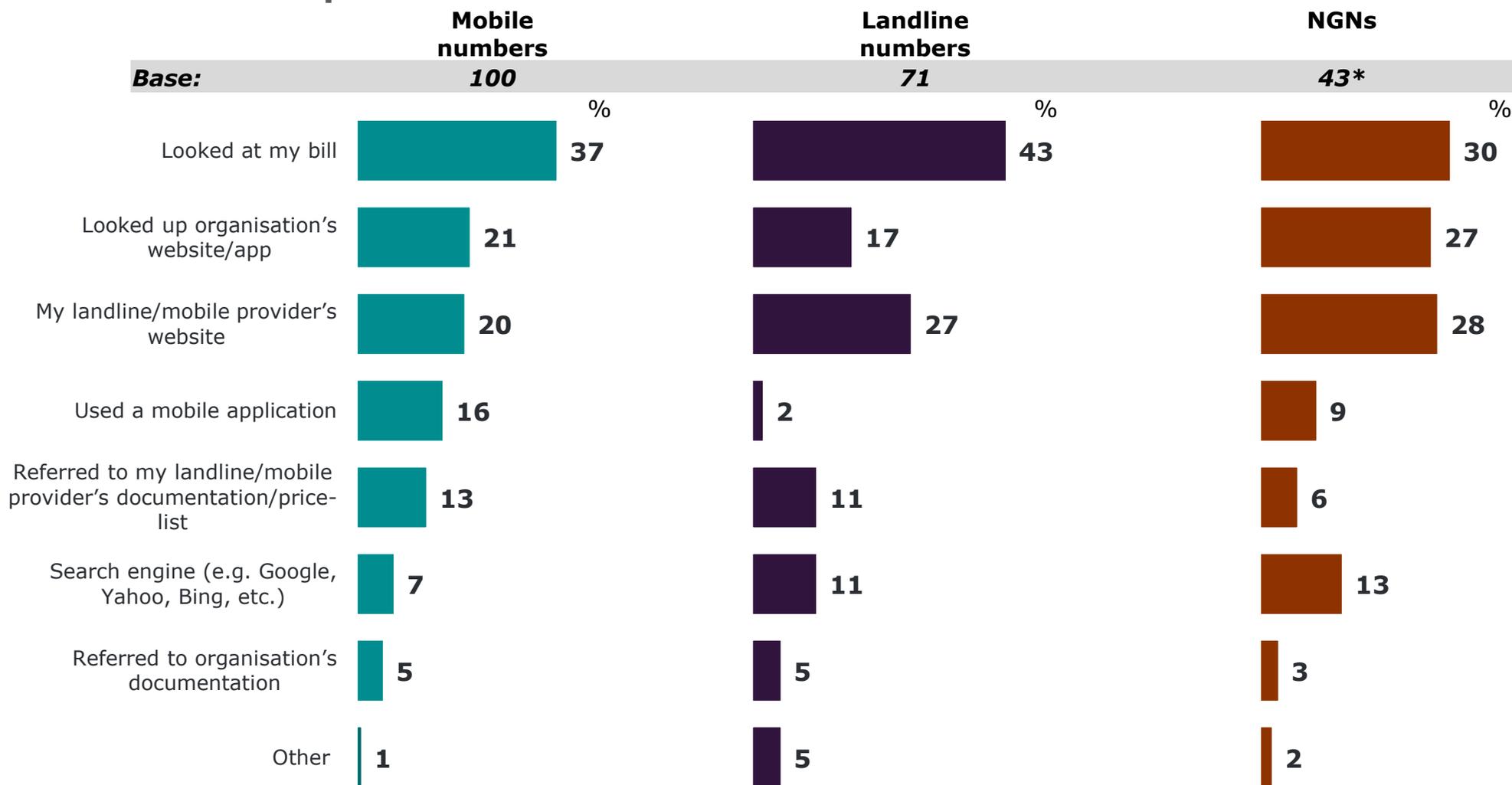


Among those who looked up call costs, the majority found the cost information they were looking for. However, 1 in 8 of those looking up the cost of calls to NGNs could not find it and almost 1 in 5 could not recall if they found it.

*Caution small base size.

Sources used to find the pricing information of different phone numbers

Base: All looked up cost

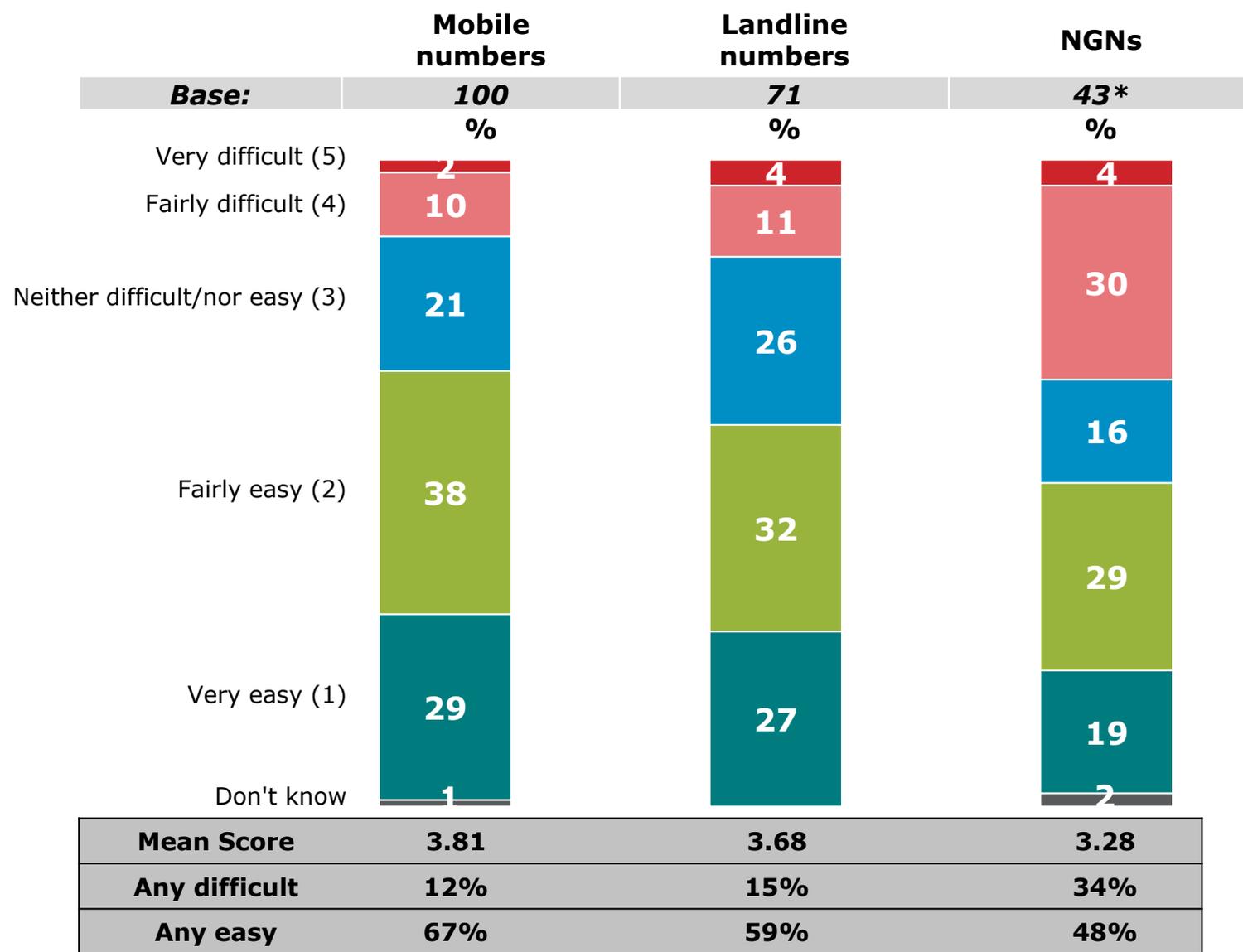


The bill is the main source for researching landline, mobile and NGN call costs. For NGN call costs, looking up websites is also prominent.

* Caution small base size.
** Multiple responses allowed.

Ease of finding out the price of a call

Base: All looked up cost

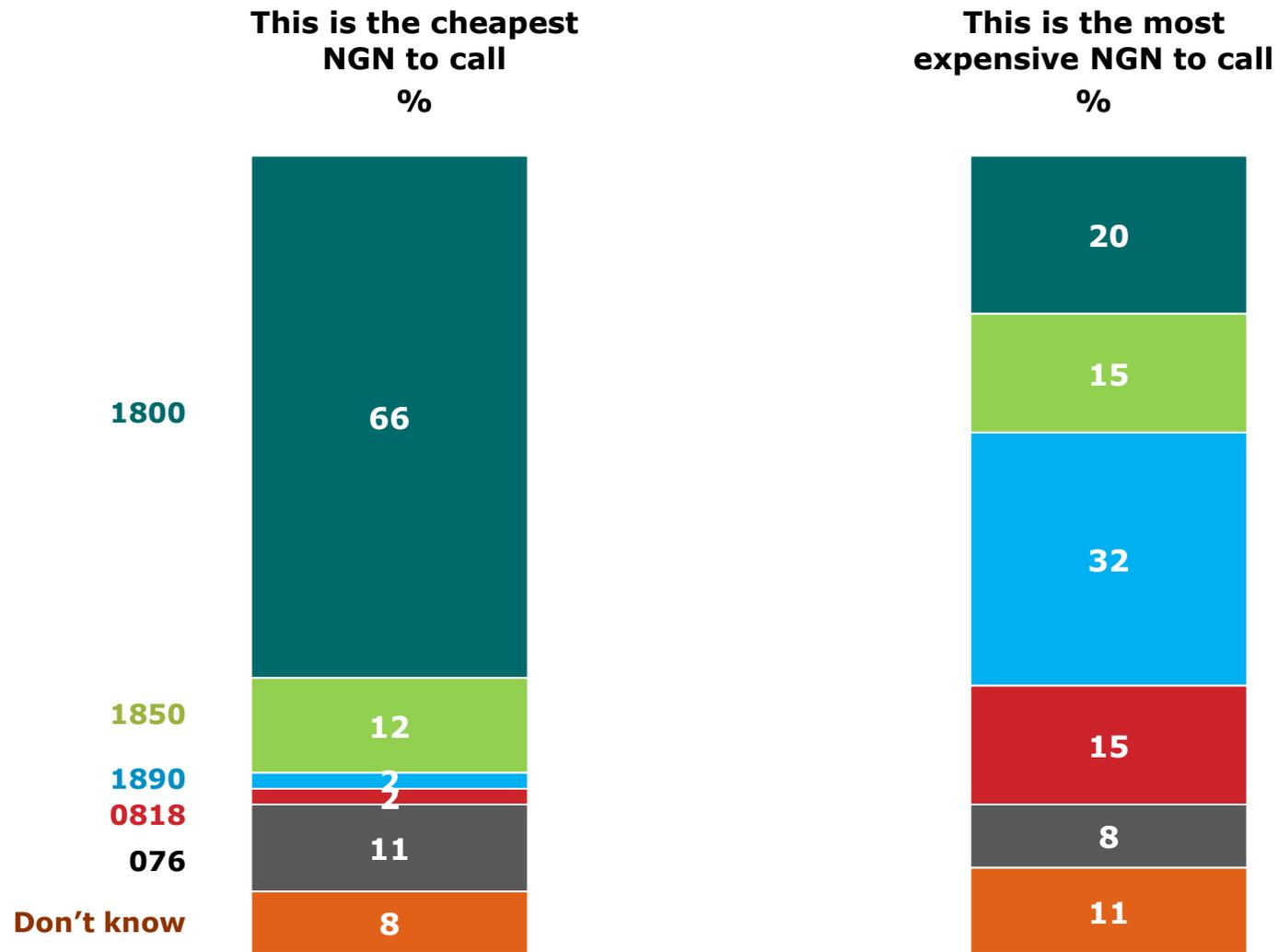


Finding out the cost of calls to NGNs is viewed as more difficult than finding out landline and mobile call costs.

*Caution small base size.

Consumer perceptions of NGN costs (I)

Base: All looked up cost of NGNs (43*)



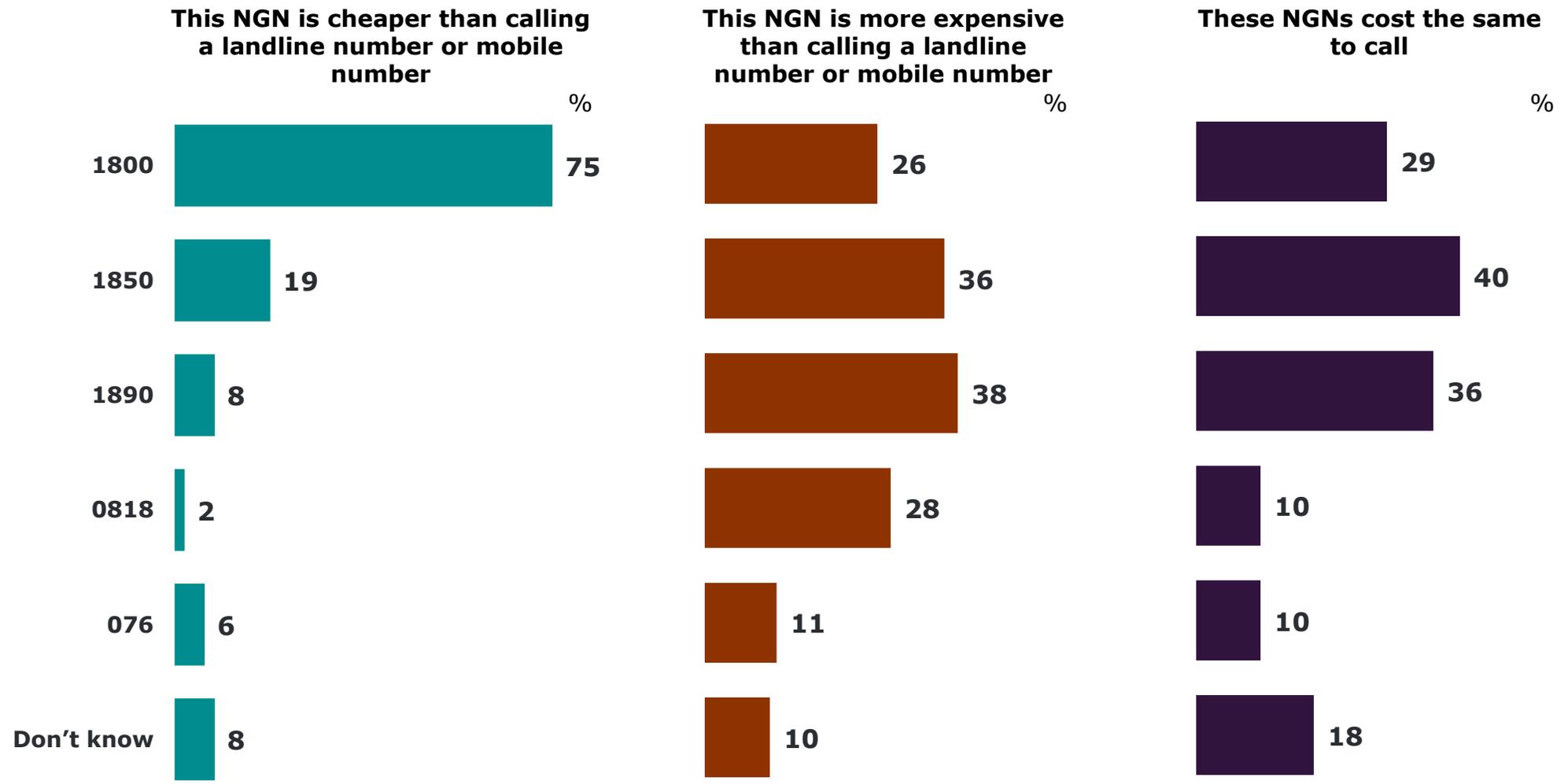
Of those who looked up NGN call costs, the 1800 NGNs are perceived as cheapest to call and 1890 NGNs are perceived as most expensive to call.

* Caution small base size.



Consumer perception of NGN costs (II)

Base: All looked up cost of NGNs (43)*

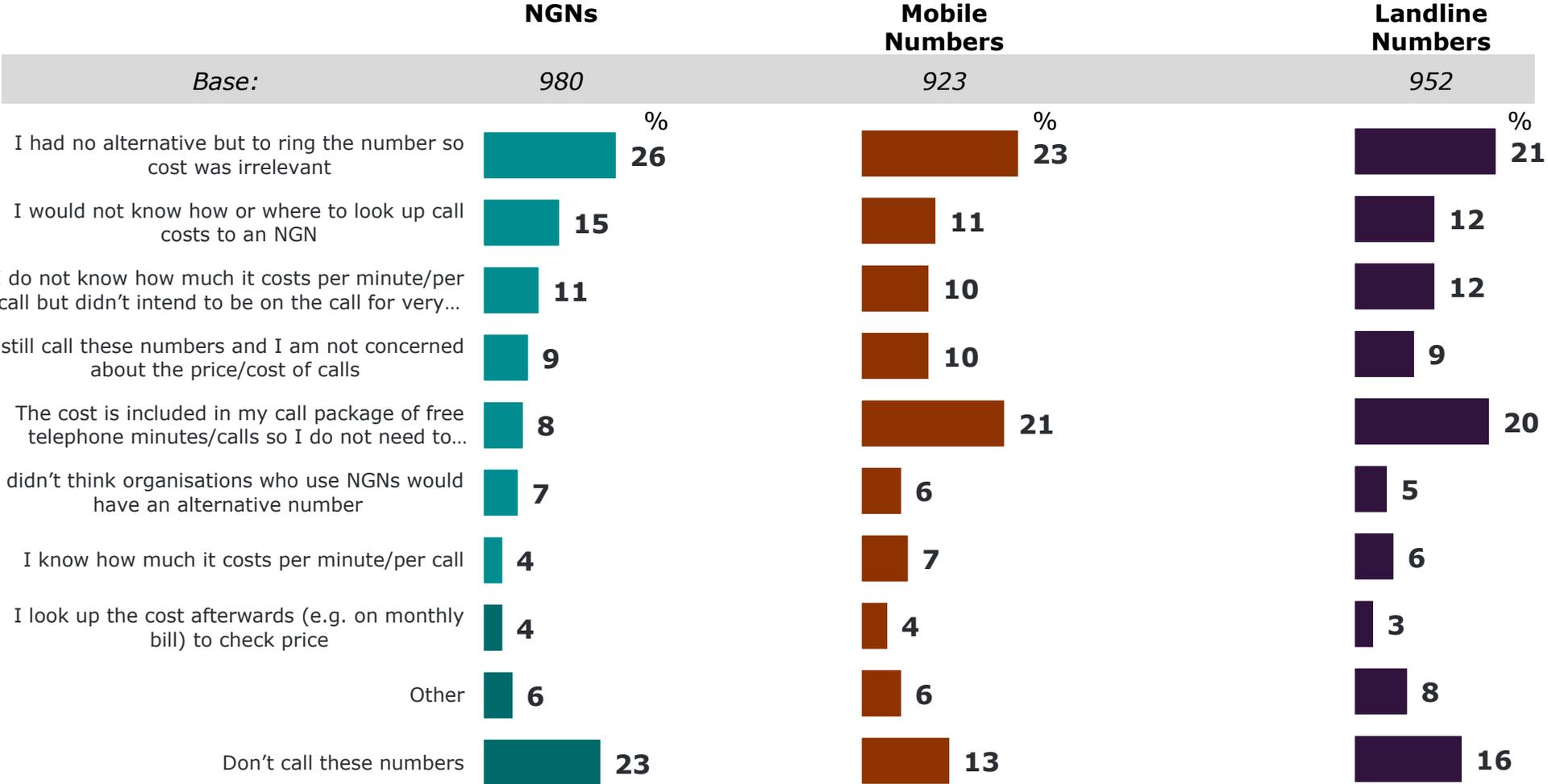


Three quarters of those who looked up NGN call costs associated 1800 with being cheaper than calling a landline or mobile number. Of all NGNs, the 1890 and 1850 NGNs achieved the highest associations with 'this NGN is more expensive than calling a landline number or mobile'.

* Caution small base size.
 ** Multiple responses allowed.

Reason for never having looked up pricing information to find out the price of a call

Base: All did not look up cost



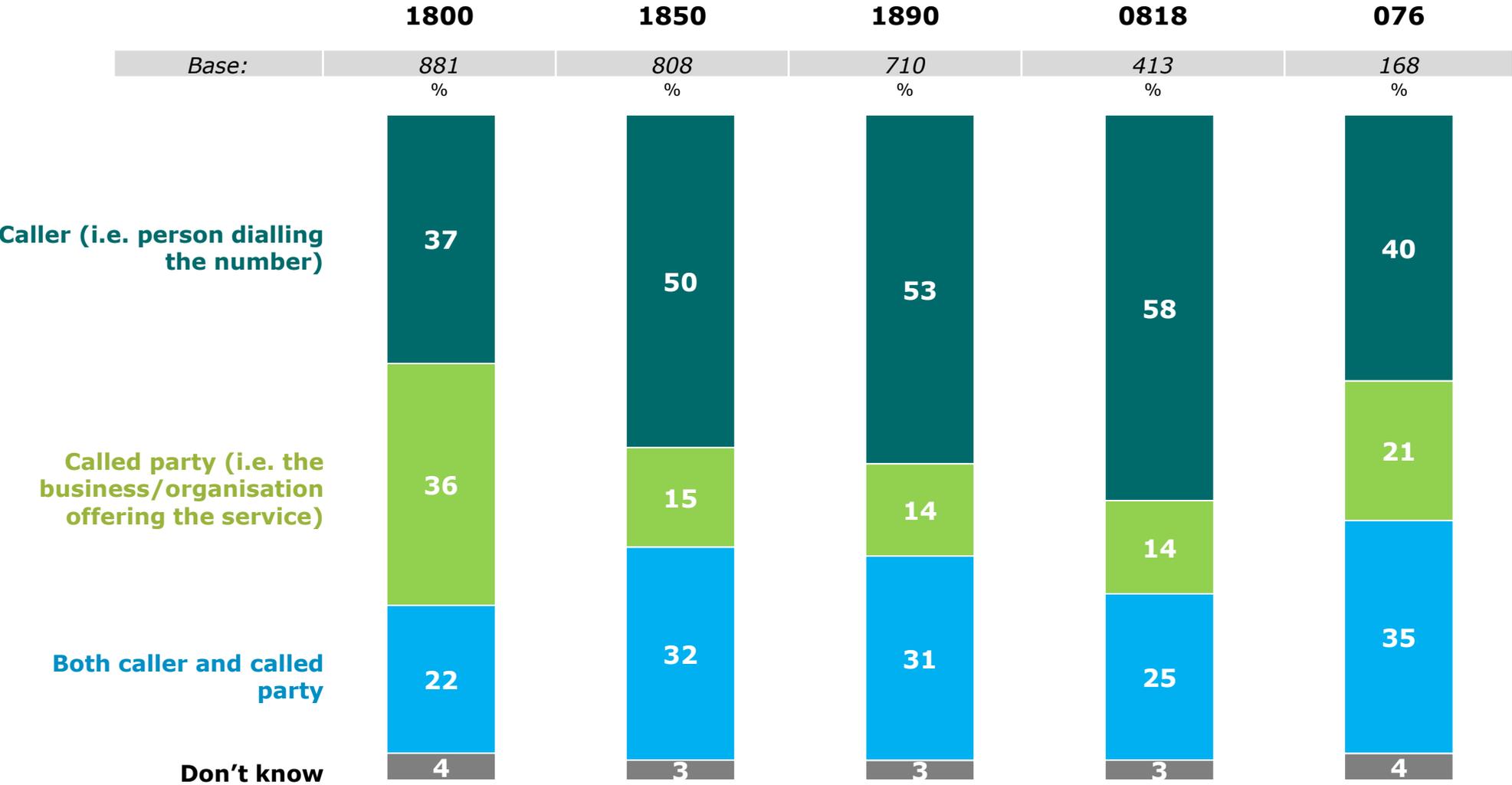
The main reason for not looking up NGN call costs was that there was no alternative. 1 in 7 said they would not know where to look up the cost of calls to NGNs. The main reasons for not looking up landline and mobile call costs were that there was no alternative and that cost is included in call package of free telephone minutes/calls so do not need to.

** Multiple responses allowed.
 *** See appendix chart for data breakdown.

Q.26 Why have you never looked up pricing information to find out the price of a call to [Insert Landline numbers/NGNs/Mobile numbers as appropriate from Q.21]?

Consumer's perception of who pays for calls to NGNs

Base: All aware of relevant NGN



Many consumers are of the view that the cost of calling NGNs falls on the caller. Over a third believe that the caller pays for calls to 1800 numbers despite these calls being free from landline and mobile. For the shared cost NGNs, almost a third indicated that both the caller and called party pays.



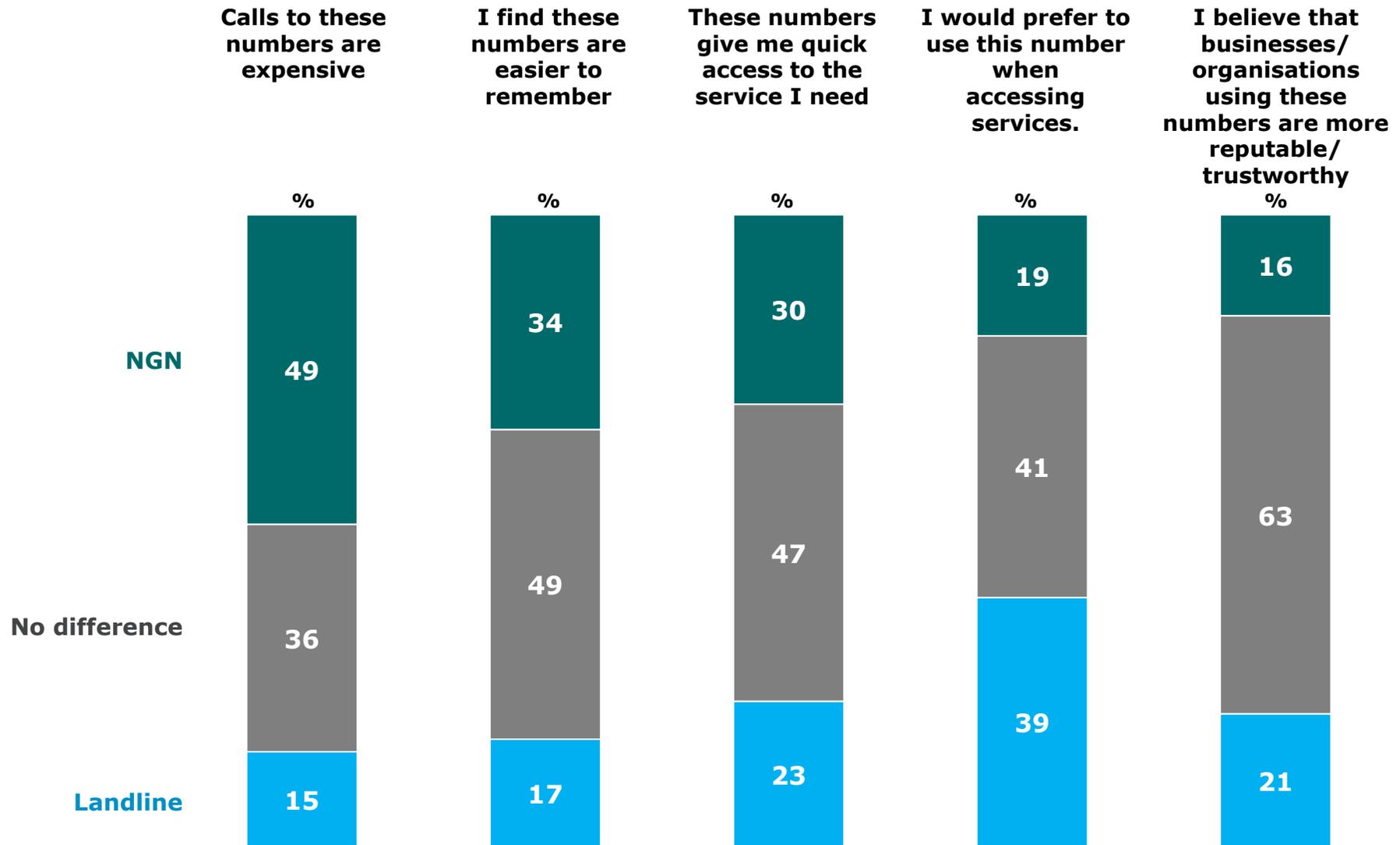
Q.27 In your view, when businesses/organisations provide a service with an NGN, who pays for the cost of providing services over this type of NGN?

Attitudes towards NGNs and calling preferences



Attitudes towards NGNs vs landline business usage

Base: All aware of NGNs (919)



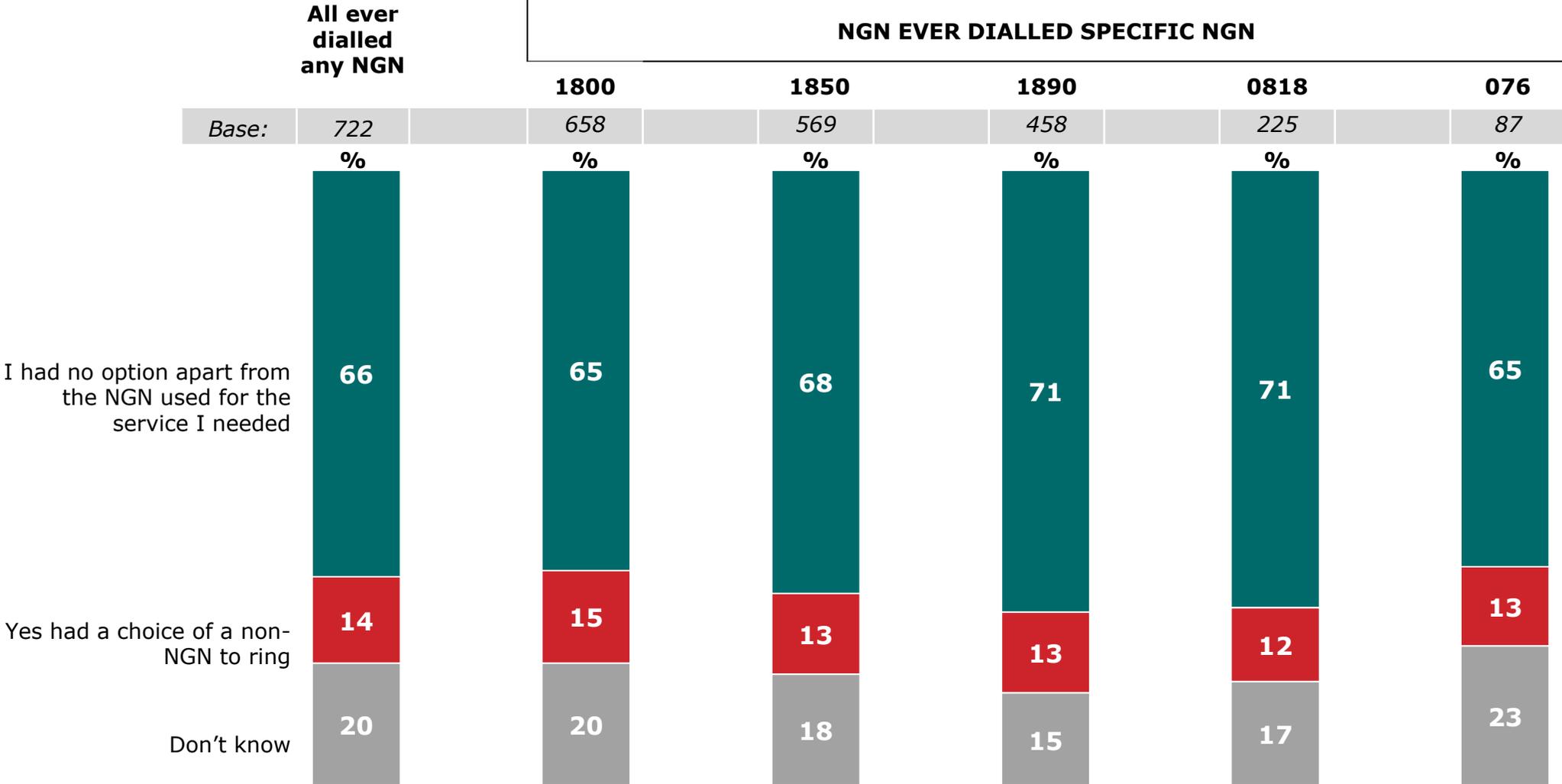
Almost half of those aware of NGNs think calls to NGNs are expensive. A third think that NGNs are easier to remember. Almost 2 in 5 would prefer to use a landline number when accessing services.



Q. 28 For each statement please indicate whether you associate this more with calls to landlines, calls to NGNs or whether there is no difference?

Choice of a number apart from the NGN to ring

Base: All ever dialled NGN



2 in 3 of those who ever dialled a NGN indicated that they had no choice but use a NGN for the service needed. However, 1 in 7 dialled a NGN even when they had a choice of non-NGN to ring.

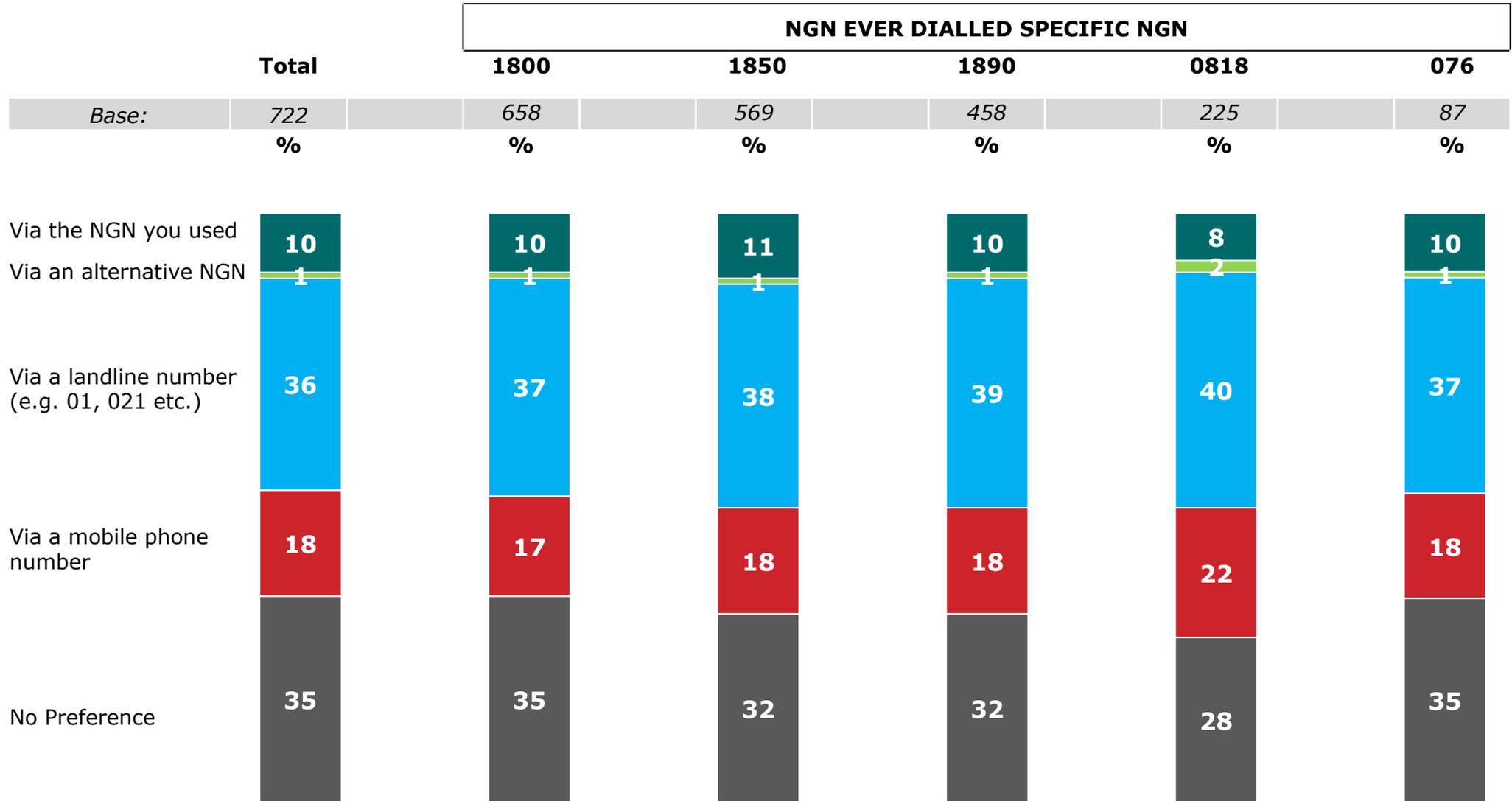


Q.29 Thinking about your call via an NGN did you have a choice of a number apart from the NGN to ring (e.g. Landline 01, 021, etc. number), or not?



Telephone number preference when calling organisations or accessing services

Base: All ever dialled any NGN



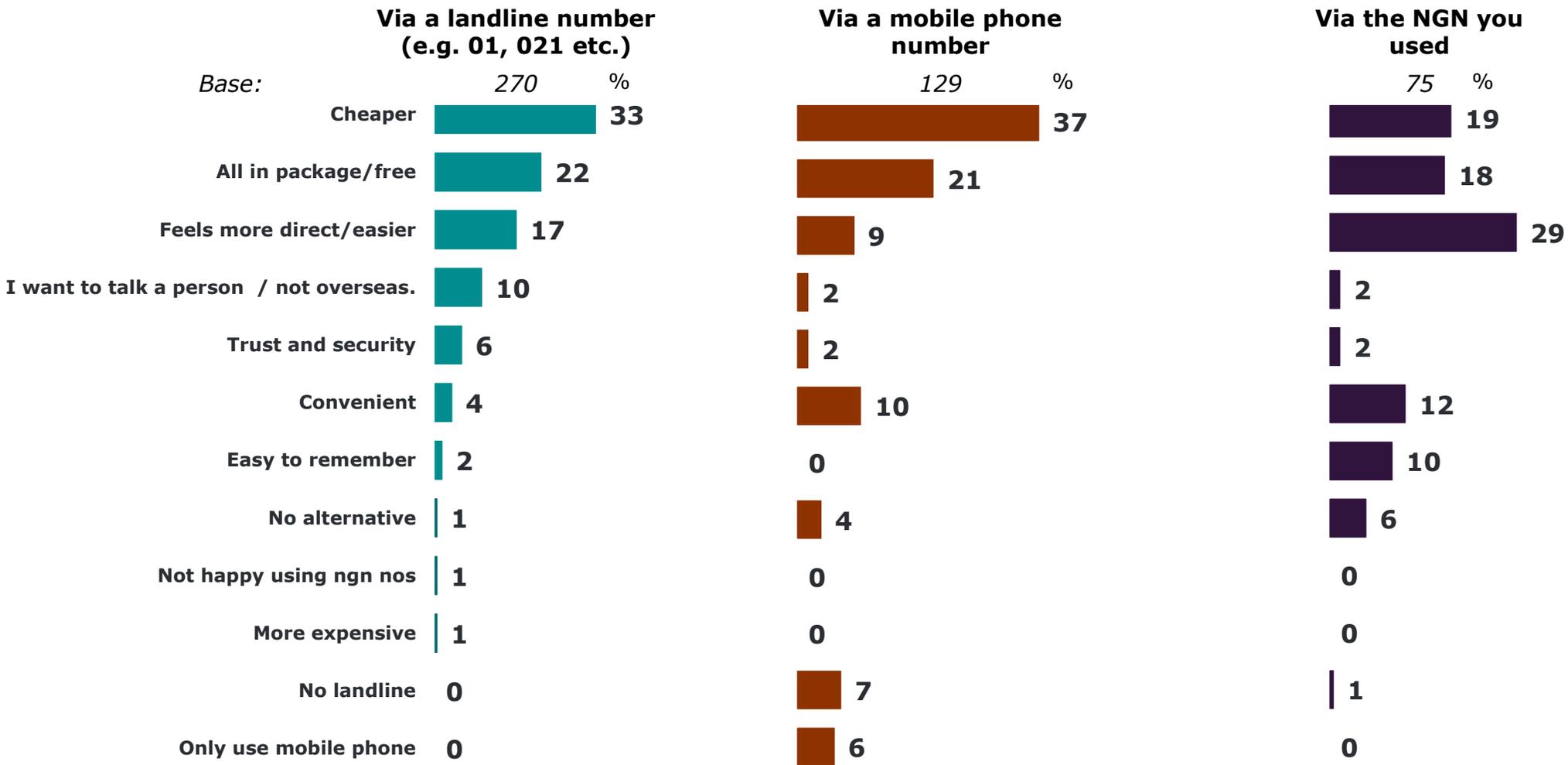
Almost 2 in 5 of those who dialled any NGN would have preferred to call the organisation via a landline. However between a quarter and one third have no preference. Little variation in preferences across NGNs.



Q.30 And still thinking about your call using a NGN if you had a choice would you have preferred to call this organisation or accessed this service

Reason for calling preference

Base: All ever dialled NGN and have a preference on telephone number used



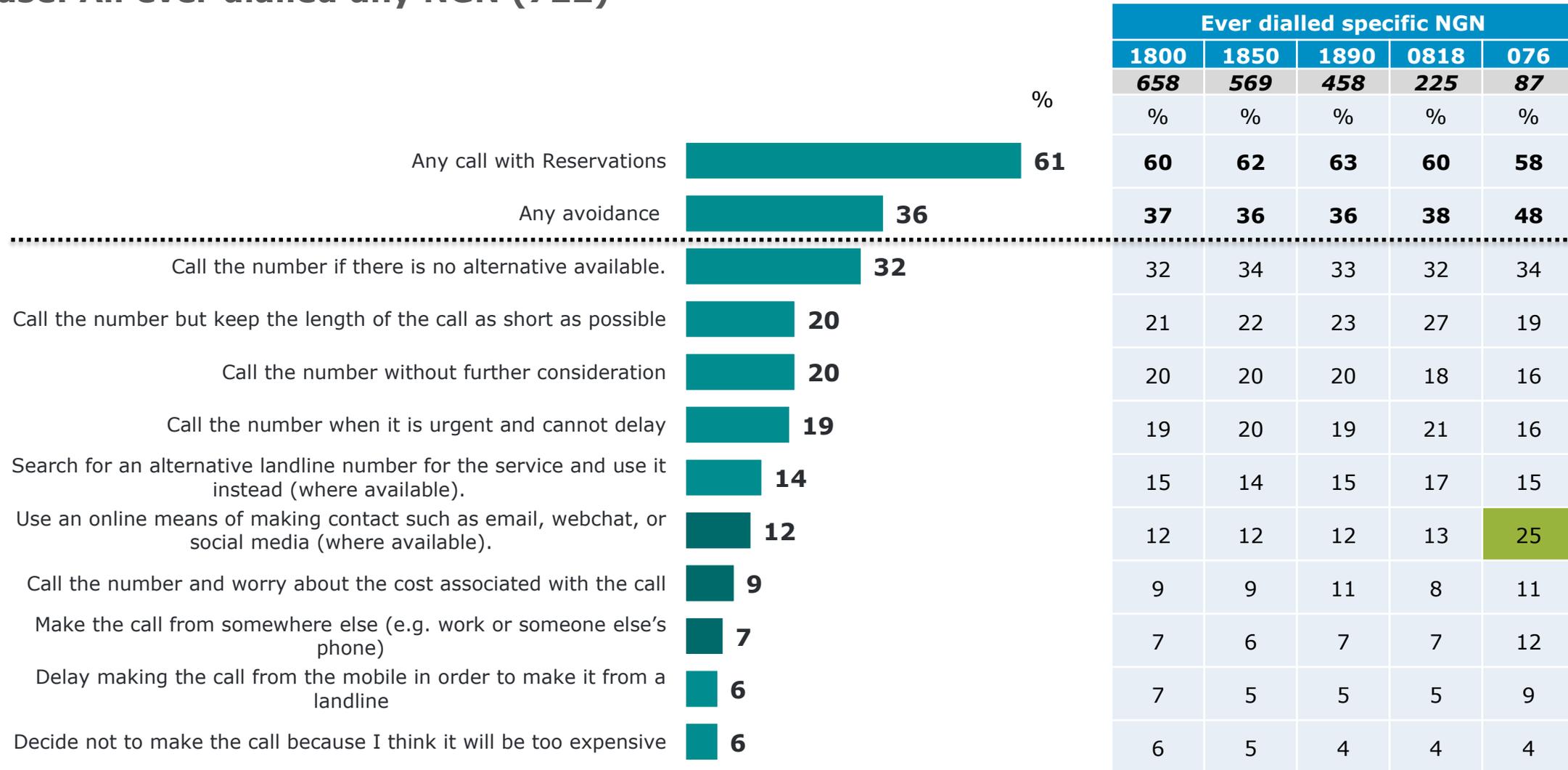
The perception that calling via an alternative number would be cheaper is the main reason for that preference. Those who were happy to use the NGN did so because it felt more direct. 1 in 10 preferred the NGN used because it was easier to remember.

* Base on 'via an alternative NGN' too low for analysis.

Typical actions when accessing services using NGNs

 = Significantly higher vs total

Base: All ever dialled any NGN (722)



The majority of those who ever dialled any NGN typically call NGNs with reservations.

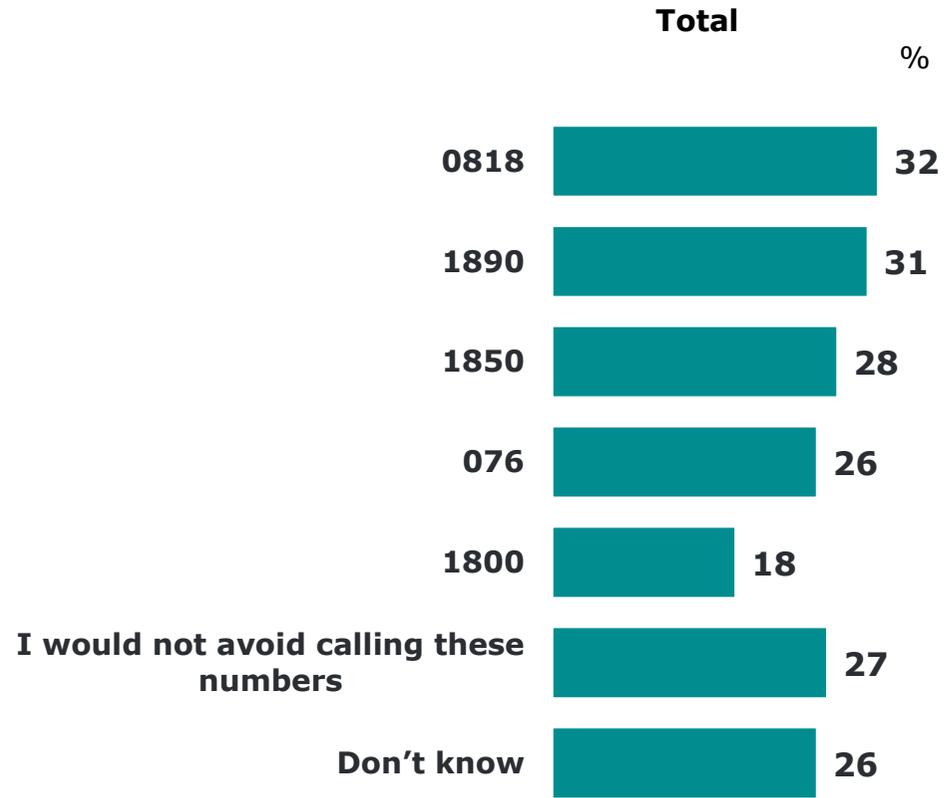
** Multiple responses allowed.



NGNs that consumers avoid using

Base: All adults aged 18+ (1,023)

■ = Significantly higher vs total
■ = Significantly lower vs total



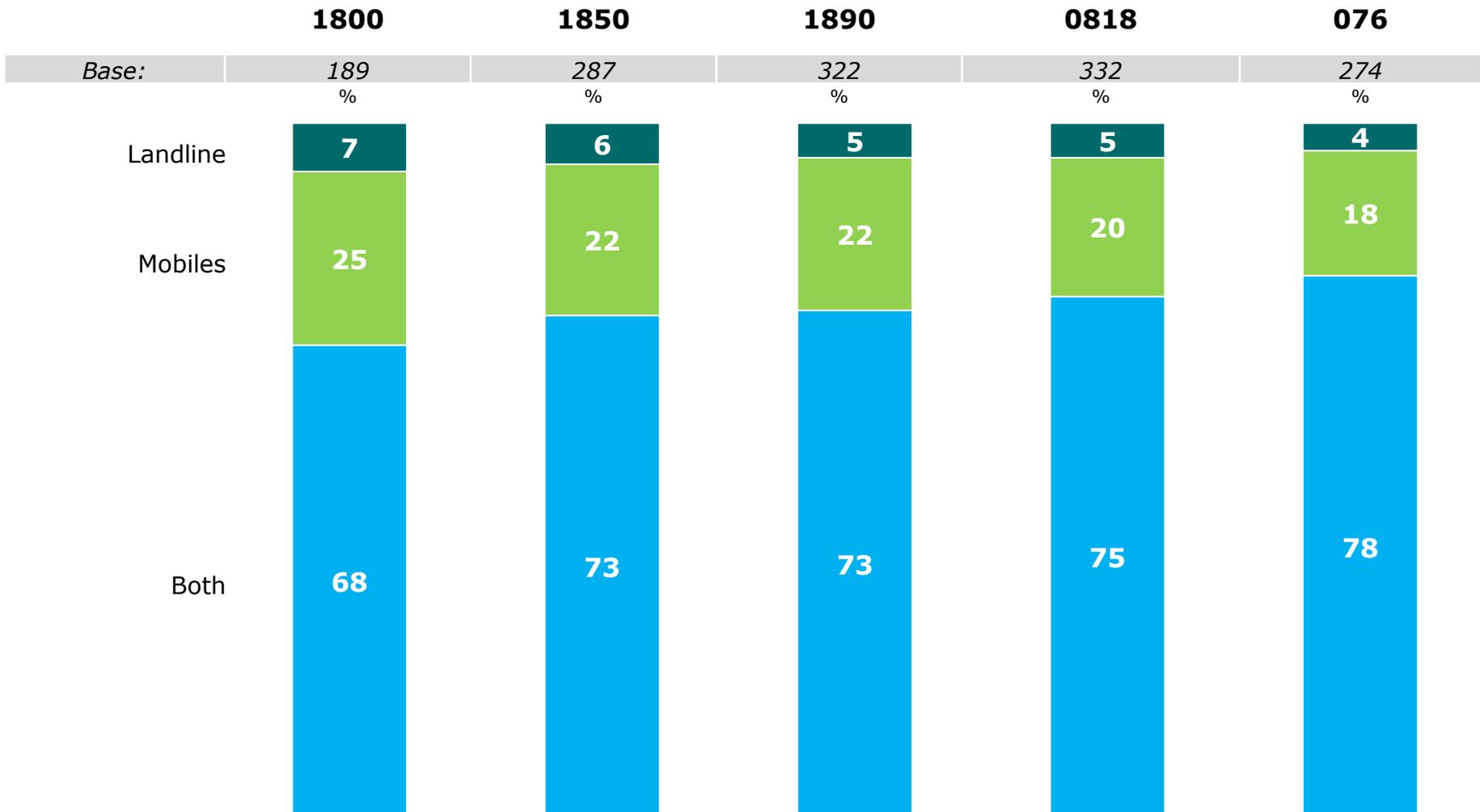
Gender		Age					Social Class			Region			Decision Maker	
Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No
499	524	98	178	316	263	168	430	547	46	289	360	374	878	145
%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
31	33	32	30	35	38	23	29	34	39	28	28	39	33	27
30	32	29	31	35	33	25	27	35	30	23	31	38	32	27
27	29	30	26	31	29	23	25	30	30	21	29	32	29	25
25	28	27	20	30	33	19	25	27	34	23	30	25	27	23
18	19	23	15	20	18	17	15	21	21	15	19	21	18	18
29	25	21	30	25	25	33	27	28	16	24	28	28	26	34
25	27	37	24	22	23	32	25	25	35	36	24	20	25	29

Of the five NGNs, the 1800 NGNs are least avoided. Over a quarter would avoid using 1850 and 076 NGNs whereas almost a third would avoid using 1890 and 0818 NGNs. A quarter of adults would not avoid using any NGN.

** Multiple responses allowed.

Whether avoid calling NGN from landline, mobile or both

Base: All avoid calling specific NGNs



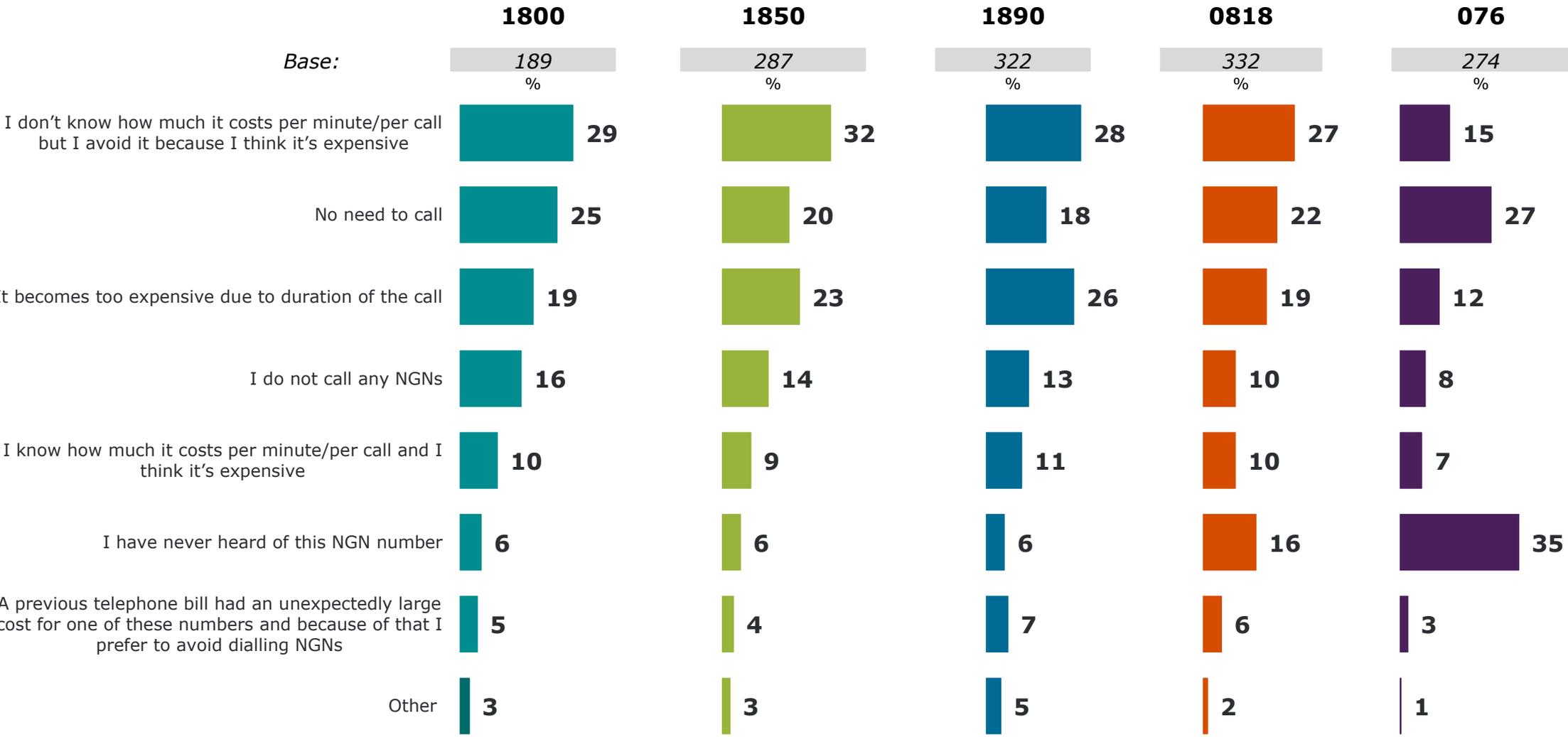
The majority of those who avoid calling NGNs would avoid calling them from both landlines and mobiles. More consumers avoid calling NGNs from mobile than from landline across all five NGNs.



Q.34 You said you would tend to avoid using (Q33 each number in turn). Would you avoid calling this number from a landline or mobile or from both landlines and mobiles?

Rationale for NGN call avoidance

Base: All avoid calling specific NGNs



For the 1800, 1850, 1890 and 0818 NGNs, the main reason for call avoidance is the perception that these calls are expensive. The main reason for avoidance of the 076 NGN is 'I have never heard of this number'.

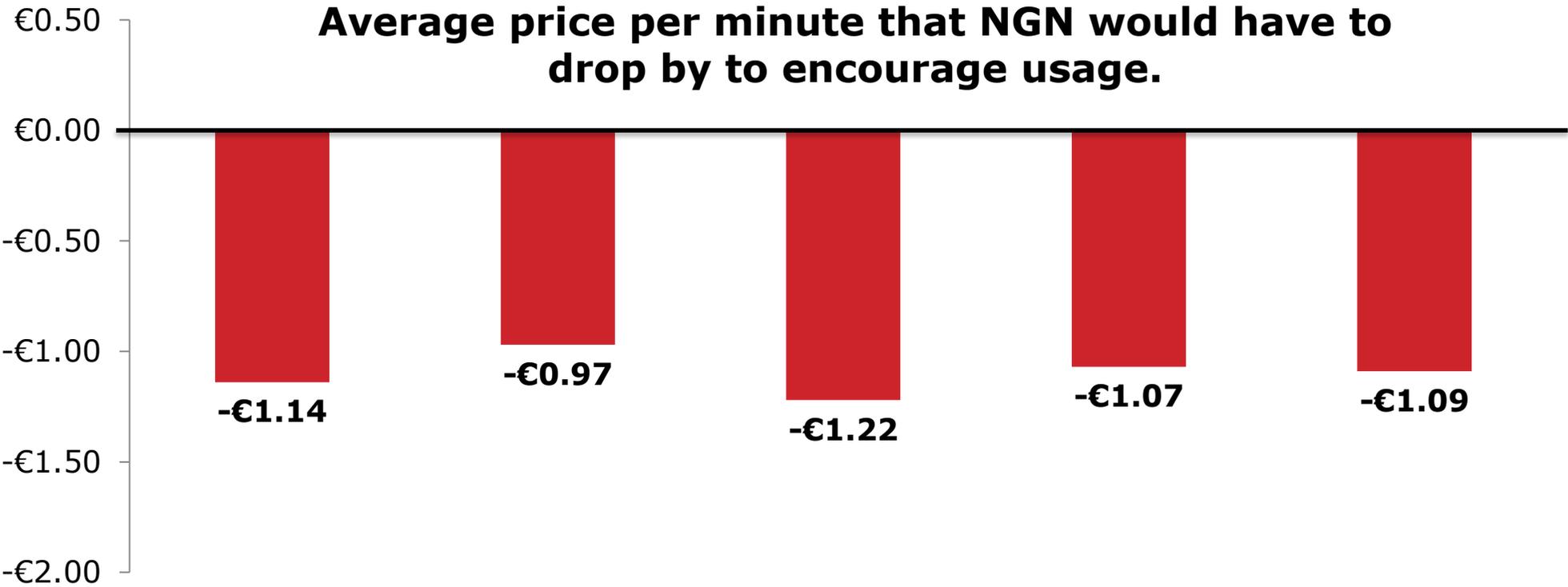
** Multiple responses allowed.



How much the cost of calling specific NGNs would need to drop to encourage usage

Base: All would avoid using specific NGNs

	1800	1850	1890	0818	076
Base:	73	115	125	120	58



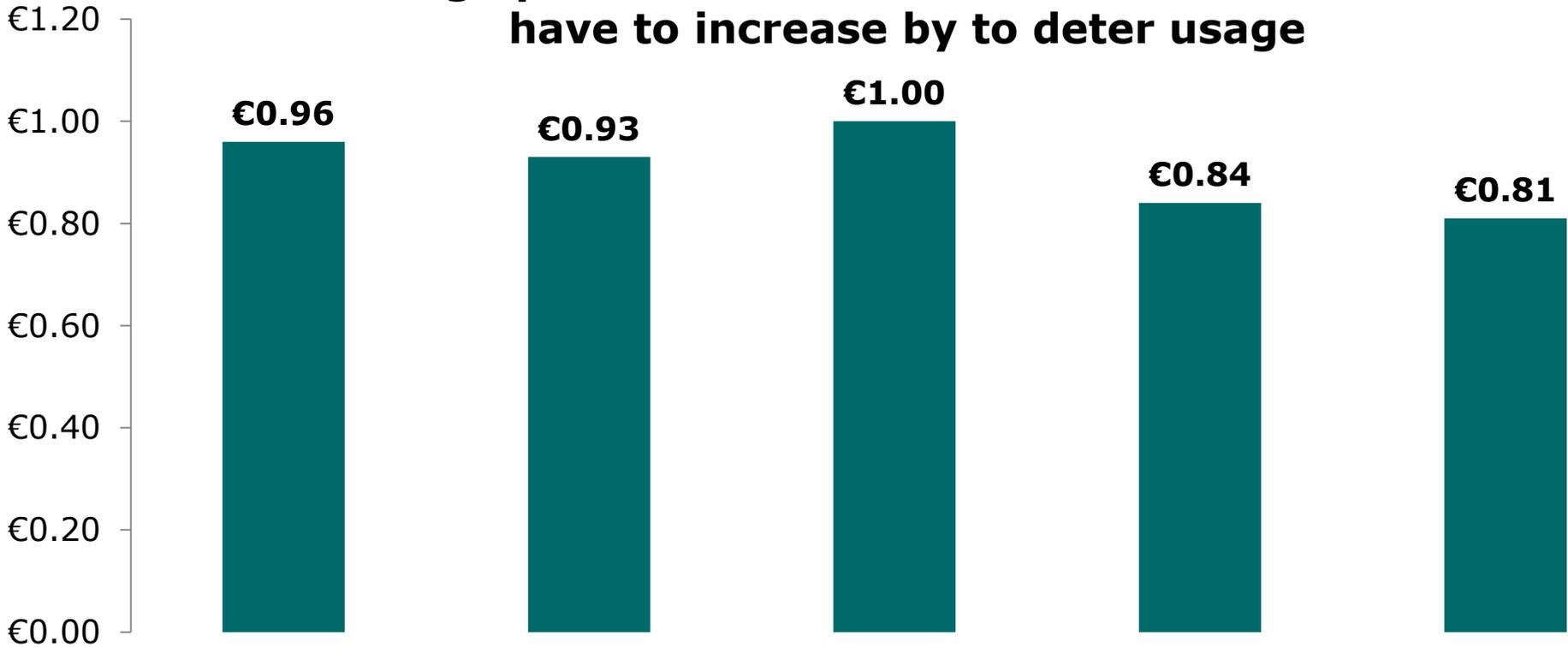
Among those who avoid using specific NGNs, call costs to 1890 numbers would need to decrease most (on average by €1.22 per minute) to encourage usage.

How much the price for a one minute call would have to increase to discourage NGN usage

Base: All would not avoid calling NGNs & ever dial NGNs

	1800	1850	1890	0818	076
Base:	193	175	138	66	23*

Average price that a one minute call to NGNs would have to increase by to deter usage



Among those who do not avoid calling NGNs, the average cost of a one minute call would need to increase by between €0.81 and €1.00 to discourage use.

* Caution small base size.



Q.37 You said you would not avoid dialling any NGNs, how much would the price for a one minute call have to increase for you to stop using these numbers altogether?

The Questionnaire



The Questionnaire



J.7151

**ComReg
Consumer NGN Questionnaire
Final Interview Version
10th May
ALL ADULTS AGED 18+**

SECTION 1: DEMOGRAPHICS

Good Morning/afternoon/evening, my name is _____ from Behaviour & Attitudes, the independent market research company. We are conducting a survey on behalf of the Commission for Communications Regulation (ComReg) on certain types of telephone numbers and would like to ask you a number of questions. ComReg is required to ensure that numbers are used in a way that protects consumers and promotes competition. The answers you give are very important in terms of informing ComReg's future work on these numbers.

All responses given will be treated in aggregate and anonymous form.

The study will take approximately 15 -20 minutes depending on your answers.

Q.A Gender

Male	1
Female	2

Q.B Age (18+)

Exact Age

18-24	1
25-34	2
35-44	3
45-49	4
50-54	5
55-64	6
65+	7

Q.C Marital Status

Single	1
Married	2
Co-habiting/living as married	3
Widowed	4
Separated/divorced	5



Q.D How many people (including yourself) live in your household?

1	1
2	2
3	3
4	4
5	5
6	6
7	7
8+	8

Q.E Region - Province & County (ROI counties)

Carlow	1	Limerick	14
Cavan	2	Longford	15
Clare	3	Louth	16
Cork	4	Mayo	17
Donegal	5	Meath	18
Dublin	6	Monaghan	19
Galway	7	Roscommon	20
Kerry	8	Sligo	21
Kildare	9	Tipperary	22
Kilkenny	10	Waterford	23
Laois	11	Wexford	24
Offaly	12	Westmeath	25
Leitrim	13	Wicklow	26

QFa Were you born in Ireland?

Yes	1
No	2

IF NO

QFb In which country were you born? _____

Q G How would you describe your current employment status? Single response

RESPONDENT EMPLOYMENT STATUS: |

Working full time (30+ hrs)	1
Working Part time (<30 hrs)	2
Self-employed (incl. farmers)	3
Unemployed	4
Home duties	5
Retired	6
Student	7



The Questionnaire



J.7151

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Consumer NGN Questionnaire
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4	4
5	5
6	6
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Cork	4	Mayo	17
Donegal	5	Meath	18
Dublin	6	Monaghan	19
Galway	7	Roscommon	20
Kerry	8	Sligo	21
Kildare	9	Tipperary	22
Kilkenny	10	Waterford	23
Laois	11	Wexford	24
Offaly	12	Westmeath	25
Leitrim	13	Wicklow	26

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No	2

IF NO

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Self-employed (incl. farmers)	3
Unemployed	4
Home duties	5
Retired	6
Student	7



The Questionnaire



ASK ALL

Q.4H **What is the occupation of head of household (use to code social class).**

Please indicate to which occupational group the Chief Income Earner in your household belongs, or which group fits best.

The Chief Income Earner is the person in your household with the largest income, this could be you. If the Chief Income Earner is retired and has an occupational pension please answer for their most recent occupation. If the Chief Income Earner is not in paid employment but has been out of work for less than 6 months, please answer for their most recent occupation.

Record verbatim – interviewer to code social class

Social class

AB	1
C1	2
C2	3
D	4
E	5
F50-	6
F50+	7

ASK ALL

Q.1a Who decides which landline, TV or broadband provider is used in your household?

INTERVIEWER: SINGLE CODE

It's mainly my decision	1
It's a decision I share with others	2
It's mainly someone else's decision	3
Don't Know	4

SECTION 2: Telephony Services

ASK ALL

Q.1b Which company do you pay for your household landline?

specify	
I don't have a landline	

ASK ALL

Q.1c Which company is your main mobile phone provider?

specify	
I don't have a mobile	

3



Q.1d Is your main mobile telephone? READ OUT

Billpay mobile	1
Prepay, credit top up mobile	2

SECTION 3: Awareness & Usage of NGNs

ASK ALL

Q.2 What is your **preferred** method for contacting businesses or organisations? This may include but is not limited to, banks, utilities, charities, government services etc? **SHOW SCREEN. ALLOW ONE ANSWER.**

Call via mobile phone	1
Call via home landline telephone	2
Text-based service (e.g. SMS)	3
On-line (webchat, email, social media)	4
Letter (physical mail)	5
Face-to-face visit	6
Other (specify)	7
Never contact these types of businesses/ organisations (Do not show)	8

Q.2a How often do you use each of the following methods to contact businesses and organisations? For each state regularly (10+ times per year), occasionally (3-10 times per year), rarely (1-3 times per year) or never

SHOW SCREEN. CHOOSE ONE ANSWER FOR EACH STATEMENT.

	Regularly	Occasionally	Rarely	Never
Call via home landline telephone	1	2	3	4
Call via mobile phone	1	2	3	4
Text-based service (e.g. SMS)	1	2	3	4
On-line (webchat, email, social media)	1	2	3	4
Letter (physical mail)	1	2	3	4
Other (specify)	1	2	3	4

INTERVIEWER EXPLAIN:

Businesses and organisations, such as banks, utilities etc. often use certain types of telephone numbers other than ordinary landline e.g. (01) and (061) or mobile numbers, as contact numbers to offer services and helplines. These numbers are called Non-Geographic Numbers because they are not linked to any specific location.

We use the terms Non-Geographic Number and NGN interchangeably throughout this survey.

4

The Questionnaire



Q.3 Are you aware of these Non-Geographic Number (NGN) prefixes? **SHOW SCREEN**

	Aware	Not Aware
1800	1	2
1850	1	2
1890	1	2
0818	1	2
076	1	2

FOR EACH NGN AWARE OF AT Q.3 ASK

Q.4 How often do you dial any of the following NGNs? For each number type please state regularly (10+ times per year), occasionally (3-10 times per year), rarely (1-3 times a year) or never. **SHOW SCREEN**

Number	Regularly	Occasionally	Rarely	Never
1800				
1850				
1890				
0818				
076				

FOR EACH NGN USED REGULARLY, OCCASIONALLY OR RARELY IN Q.4

Q.5a Thinking about the NGNs you dial [regularly/occasionally/rarely] such as (LIST EACH IN TURN Q.4), which, if any, of the following are reasons you use these Non-Geographic Numbers. **SHOW SCREEN. ALLOW MULTIPLE ANSWERS FOR EACH NGN USED AT Q.4**

ROTATE ORDER	Number
It is important that I have access to the service	1
It was the only contact number I could find for the company/service - no choice	2
I remembered it from advertising	3
It is less expensive than calling a landline number (e.g. numbers with a geographic prefix - (01), (021), (061))	4
It is less expensive than calling a mobile number	5
It is convenient to use this number	6
I needed to make calls urgently	7
Other (specify _____)	8

5



IF DIALLED ANY NGN REGULARLY, OCCASIONALLY OR RARELY IN Q.4 ASK

Q.6a What type of services have you accessed via NGNs? **SHOW SCREEN. ALLOW MULTIPLE ANSWERS.**

Customer Care/Helpline	1
Marketing Campaign response line	2
Product/service support	3
Product enquiry	4
General company/customer enquiry	5
Conference call number	6
Telephone banking	7
Sales line/product purchase	8
Social Service (e.g. charities, support lines, etc.)	9
Government Service (e.g. water charges, revenue commissioners/tax, etc.)	10
Health service (e.g. DDoc)	11
Other (specify _____)	12
Can't remember	00

IF CODE 1-12 IN Q.6a ASK

Q.6b Do you remember which type of NGN you dialled to access the above [Q6a.] services?

	1800	1850	1890	0818	076	Can't remember
Customer Care/Helpline	1	2	3	4	5	0
Marketing Campaign response line	1	2	3	4	5	0
Product/service support	1	2	3	4	5	0
Product enquiry	1	2	3	4	5	0
General company/customer enquiry	1	2	3	4	5	0
Conference call number	1	2	3	4	5	0
Telephone banking	1	2	3	4	5	0
Sales line/product purchase	1	2	3	4	5	0
Social Service (e.g. charities, support lines, etc.)	1	2	3	4	5	0
Government Service (e.g. water charges, revenue commissioners/tax, etc.)	1	2	3	4	5	0
Health service (e.g. DDoc)	1	2	3	4	5	0
Other (specify _____)	1	2	3	4	5	0

6

The Questionnaire



ASK ALL WHO DIALLED NGNs REGULARLY, OCCASIONALLY OR RARELY IN Q.4

Q.7 Thinking about calling services via NGNs, do you typically make these calls from a landline, a prepay mobile phone or a billpay mobile phone?
DO NOT READ OUT BUT CODE TO PRECODES.

Landline	1
Prepay Mobile Phone	2
Billpay Mobile Phone	3
Whichever is most convenient	4
Depends on which NGN I am dialling	5
Don't know	6

ASK ALL AWARE OF NGNs FROM Q.3

Q.8 Which NGN or NGNs, if any, do you associate with each of the following statements. You can mention as many or as few NGNs as you like per statement.
SHOW SCREEN. ALLOW MULTIPLE ANSWERS FOR EACH STATEMENT.

ROTATE ORDER	1800	1850	1890	0818	076	None of these	Don't know (DO NOT SHOW)
Organisations can offer a lower call rate to customers using this NGN	1	2	3	4	5	6	7
This/these number(s) is/are free for people to call	1	2	3	4	5	6	7
Organisations can make money from customers dialling these NGNs	1	2	3	4	5	6	7

ASK ALL AWARE OF NGNs FROM Q.3

Q.9 For each statement I show you, please tell me which NGN or NGNs you think is/are associated with it?

SHOW SCREEN. ALLOW MULTIPLE ANSWERS FOR EACH STATEMENT

ROTATE ORDER	1800	1850	1890	0818	076	None of these	Don't know (DO NOT SHOW)
Free to call from mobile	1	2	3	4	5	6	7
Free to call from landline	1	2	3	4	5	6	7
Calls to this number are charged per call	1	2	3	4	5	6	7
Calls to this number are charged per minute	1	2	3	4	5	6	7

7



ASK FOR NGNs AWARE OF AT Q.3

Q.10 Thinking about [insert NGN aware of from Q3] please indicate which statement you associate most with this number. **SHOW SCREEN. ALLOW MULTIPLE ANSWERS FOR EACH STATEMENT.**

	1800	1850	1890	0818	076
I think they are expensive	1	2	3	4	5
I do not think they are expensive	1	2	3	4	5
I don't know whether they are expensive or not	1	2	3	4	5
I don't particularly care about the cost	1	2	3	4	5
Don't know (DO NOT SHOW)	1	2	3	4	5

SECTION 4 – CALL PACKAGES AND COSTS

ASK ALL WITH A LANDLINE AT Q1B AND DECISION MAKER Q1A CODE 1 OR 2 AND AWARE OF NGNs AT Q3

Q.11a Are calls to NGNs included in your [fixed line] call package of free telephone minutes/calls? **DO NOT PROMPT BUT CODE TO PRECODES**

Yes – I am certain they are	1
Yes – I think they might be	2
Yes – I think some of them might be	3
No – I think they might not be	4
No – I am certain they are not included	5
Don't know	6

IF CODE 1 - 5 TO Q.11a

Q.11b You said that calls to NGNs are [included/not included] in your call package, how do you know? **SHOW SCREEN**

I asked my service provider	1
I found out from my bill	2
I researched the package	3
I knew when I signed up to the package	4
Calls to these numbers are blocked on my package	5
Other - specify	6

ASK ALL WHO CODE 1 - 5 TO Q.11a

Q.12 Did you consider the inclusion of NGN minutes in different call packages when choosing your provider/package??

Yes	1
No	2
Don't know	3

8

The Questionnaire



ASK ALL WHO CODE 1 - 5 TO Q.11a

Q.13 How important were costs of calls to NGNs in influencing your decision in choosing a landline provider? **SHOW SCREEN**

Very important	1
Fairly important	2
Neither important nor unimportant	3
Fairly unimportant	4
Not at all important	5
Don't know	6

ASK ALL WITH A MOBILE AND AWARE OF NGNS AT Q3

Q.14a Are calls to NGNs included in your call package of free mobile minutes/calls? **DO NOT PROMPT BUT CODE TO PRECODES**

Yes - I am certain they are	1
Yes - I think they might be	2
Yes - I think some of them might be	3
No - I think they might not be	4
No - I am certain they are not included	5
Don't know	6

IF CODE 1 - 5 TO Q.14a

Q. 14b You said that calls to NGNs are [included/not included] in your mobile call package, how do you know? **SHOW SCREEN**

I asked my service provider	1
I found out from the additional charges on my bill	2
I researched the package	3
I knew when I signed up to the package	4
Calls to these numbers are blocked on my package	5
Other - specify	6

ASK ALL WHO CODE 1 - 5 TO Q.14a

Q.15 Did you consider the inclusion of NGN minutes in different call packages when choosing your provider/package? **2,3**

Yes	1
No	2
Don't know	3



ASK ALL WHO CODE 1 - 5 TO Q.14a

Q.15a How important were costs of calls to NGNs in influencing your decision in choosing a mobile provider? **SHOW SCREEN**

Very important	1
Fairly important	2
Neither important nor unimportant	3
Fairly unimportant	4
Not at all important	5
Don't know	6

ASK ALL

Q.16 To what extent are you vigilant when it comes to the costs of NGNs as part of your overall landline/mobile spending e.g. do you look at how much you spend on these calls? **SHOW SCREEN**

Highly vigilant	1
Reasonably vigilant	2
Average	3
Not particularly vigilant	4
Not at all vigilant	5

ASK ALL EVER DIALLED ANY NGNS Q4

Q.17 Which of the following most accurately reflects how you've felt after receiving a bill or on reviewing call costs which included an additional cost related to calls to NGNs? **SHOW SCREEN - RANDOMISE. ALLOW MULTIPLE ANSWERS.**



I do not remember being charged an additional cost related to calls to NGNs	1
I was surprised at how inexpensive calls to non-geographic numbers were	2
I was surprised at how expensive the calls to non-geographic numbers were	3
I don't pay attention to the cost of calls to NGNs	4
I queried the cost of NGNs by calling my phone company	5
Other (specify _____)	6

The Questionnaire



ASK THOSE WHO WERE SURPRISED AT HOW EXPENSIVE NGN CALLS WERE IN Q.17

ONLY ASK THOSE WITH A LANDLINE AT Q1B

Q.18 You mentioned you were surprised at how expensive the calls to non-geographic numbers (NGNs) were, did this affect your landline call behaviour to these numbers in any way? **SHOW SCREEN**

ASK THOSE WHO WERE SURPRISED AT HOW EXPENSIVE NGN CALLS WERE IN Q.17

ONLY ASK THOSE WITH A MOBILE AT Q1C

Q.18a You mentioned you were surprised at how expensive the calls to non-geographic numbers (NGNs) were, did this affect your mobile phone call behaviour to these numbers in any way? **SHOW SCREEN**

	FROM LANDLINE Q18	FROM MOBILE Q18a
Yes – I stopped calling NGNs (use an alternative contact method)	1	1
Yes – I now only call NGNs when absolutely necessary	2	2
Yes – I still use NGNs but I keep the call as short as possible	3	3
No – my call behaviour to NGNs has not changed	4	4

Interview explainer: The following questions relate only to costs to customers of making calls outside of any telephone minutes included in their call package.

- If respondent wants to get bill to answer cost questions, reassure them that there is no need as we are just looking for their understanding/perception.
- If respondent notes that different network costs apply, interviewer to acknowledge and indicate that we're looking for typical costs.

Q. 19 Do you know how much it costs you per minute/per call when making calls to NGNs (in the case that they are not included in your call package, or calls are made out of bundle)?

Yes, I know all of them	1
Yes, I know some of them	2
No I don't know any	3

[DO NOT ASK QUESTIONS 20a-20c BELOW TO CONSUMERS WHO CODED 3 TO Q.19]

ASK FOR THOSE WITH LANDLINE AT QUESTION 1b AND WHO CODED 1 OR 2 AT Q.19

SHOW SCREEN



Q.20a How much do you think it costs per minute [Insert Per call if answering for 1850] to call a number starting with (ASK FOR EACH NGN AWARE OF AT Q3), from a landline during business hours?

			Answer <i>in Euro Cents</i>
--	--	--	---------------------------------------

ASK FOR THOSE WITH BILLPAY MOBILE AT QUESTION 1d AND WHO CODED 1 OR 2 AT Q.19

SHOW SCREEN

Q.20b How much do you think it costs per minute [Insert Per call if answering for 1850] to call a number starting with (ASK FOR EACH NGN AWARE OF AT Q3), from a billpay mobile during business hours?

			Answer <i>in Euro Cents</i>
--	--	--	---------------------------------------

ASK FOR THOSE WITH PREPAY MOBILE AT QUESTION 1d AND WHO CODED 1 OR 2 AT Q.19

SHOW SCREEN

Q.20c How much do you think it costs per minute [Insert Per call if answering for 1850] to call a number starting with (ASK FOR EACH NGN AWARE OF AT Q3), from a pre-pay mobile during business hours?

			Answer <i>in Euro Cents</i>
--	--	--	---------------------------------------

ASK ALL

Q.21 Have you looked up the cost of calling any of the following numbers in the past 3 months? **SHOW SCREEN**

	Yes	No
Landline numbers	1	2
NGNs	1	2
Mobile numbers	1	2

DP note: if response to Q.21 is coded 1 for any/all (landline, NGNs and/or mobiles), Q22-25 are applicable.

ASK ALL WHO CODED 1 AT Q.21

Q.22 On the last occasion did you find the cost information you were looking for?

Yes	1
No	2
Don't know	3

The Questionnaire



ASK ALL WHO CODED 1 AT Q.21

Q.23 And which of the following sources did you use to find the pricing information?
SHOW SCREEN. ALLOW MULTIPLE ANSWERS.

My landline/mobile provider's website	1
Referred to my landline/mobile provider's documentation/price-list	2
Looked up organisation's website/app	3
Referred to organisation's documentation	4
Used a mobile application	5
Looked at my bill	6
Search engine (e.g. Google, Yahoo, Bing, etc.)	7
Other (specify _____)	8

ASK ALL WHO CODED 1 AT Q.21

Q.24 How easy or difficult is it to find out the price of a call to the following numbers?
SHOW SCREEN

	Very difficult	Fairly difficult	Neither difficult/nor easy	Fairly easy	Very easy	Don't know
Landline numbers	1	2	3	4	5	0
NGNs	1	2	3	4	5	0
Mobile numbers	1	2	3	4	5	0

ASK ALL WHO CODED 1 FOR NGNS AT Q.21

Q.25 Please answer the following, in your view (you can answer more than one to the last three options): **SHOW SCREEN.**

ALLOW ONE ANSWER ONLY FOR STATEMENT 1 & 2.
ALLOW MULTIPLE ANSWERS FOR STATEMENTS 3, 4 & 5.

		1800	1850	1890	0818	076	Don't know (DO NOT SHOW)
1	This is the cheapest NGN to call	1	2	3	4	5	6
2	This is the most expensive NGN to call	1	2	3	4	5	6
3	This NGN is cheaper than calling a landline number or mobile number	1	2	3	4	5	6
4	This NGN is more expensive than calling a landline number or mobile number	1	2	3	4	5	6
5	These NGNs cost the same to call - Please specify	1	2	3	4	5	6

13



ASK ALL WHO CODED 2 AT Q.21

Q.26 Why have you never looked up pricing information to find out the price of a call to [Insert Landline numbers/NGNs/Mobile numbers as appropriate from Q.21]?

DO NOT READ OUT. CODE TO PRECODES. ALLOW MULTIPLE ANSWERS FOR EACH NUMBER CODED 2 AT Q.21

• I know how much it costs per minute/per call	1
• I had no alternative but to ring the number so cost was irrelevant	2
• I do not know how much it costs per minute/per call but didn't intend to be on the call for very long	3
• I would not know how or where to look up call costs to an NGN	4
• The cost is included in my call package of free telephone minutes/calls so I do not need to look up the cost information	5
• I didn't think organisations who use NGNs would have an alternative number	6
• I look up the cost afterwards (e.g. on monthly bill) to check price	7
• I still call these numbers and I am not concerned about the price/cost of calls	8
• Other (specify _____)	9
• Don't call these numbers	10

ASK ALL AWARE OF NGNS FROM Q3

Q.27 In your view, when businesses/organisations provide a service with an NGN, who pays for the cost of providing services over this type of NGN?

SHOW SCREEN. ROTATE ORDER.

	Caller (i.e. person dialling the number)	Called party (i.e. the business/organisation offering the service)	Both caller and called party	Don't know (DO NOT SHOW)
1800	1	2	3	4
1850	1	2	3	4
1890	1	2	3	4
0818	1	2	3	4
076	1	2	3	4

14



The Questionnaire



SECTION 6 – AVOIDANCE / ALTERNATIVE NUMBERS TO NGNs

ASK ALL AWARE OF NGNs AT Q.3.

Interviewer explain: The following questions (Question 28 -31) relate to NGNs **other than 1800 numbers.**

Q. 28) For each statement please indicate whether you associate this more with calls to landlines, calls to NGNs or whether there is no difference?

SHOW SCREEN. ROTATE ORDER. ALLOW ONE ANSWER ONLY FOR EACH STATEMENT.

	NGN	Landline	No difference
Calls to these numbers are expensive	1	2	3
I find these numbers are easier to remember	1	2	3
I believe that businesses/organisations using these numbers are more reputable/trustworthy	1	2	3
These numbers give me quick access to the service I need	1	2	3
I would prefer to use this number when accessing services.	1	2	3

IF DIALLED ANY NGN REGULARLY, OCCASIONALLY OR RARELY IN Q.4 ASK

Q.29 Thinking about your call via an NGN did you have a choice of a number apart from the NGN to ring (e.g. Landline 01, 021, etc. number), or not? **CODE TO PRECODE**

I had no option apart from the NGN used for the service I needed	1
Yes had a choice of a non-NGN to ring	2
Don't know	3

IF DIALLED ANY NGN REGULARLY, OCCASIONALLY OR RARELY IN Q.4 ASK

Q.30 And still thinking about your call using a NGN if you had a choice would you have preferred to call this organisation or accessed this service **SHOW SCREEN. ALLOW ONE ANSWER ONLY**

Via the NGN you used	1
Via an alternative NGN	2
Via a landline number (e.g. 01, 021 etc.)	3
Via a mobile phone number	4
No Preference	5



ASK THOSE THAT CODE 1 – 4 IN Q.30

Q.31 And why would you prefer to use [option indicated at (Q.30)]

ASK ALL AWARE OF NGNs AT Q.3 AND DIALLED NGNs AT Q.4

Q.32 Thinking about accessing services using NGNs, which of the following do you typically do? Please choose one answer only.

SHOW SCREEN. ROTATE ORDER. ALLOW MULTIPLE ANSWERS.



Call the number if there is no alternative available.	1
Call the number and worry about the cost associated with the call	2
Call the number but keep the length of the call as short as possible	3
Call the number when it is urgent and cannot delay	4
Call the number without further consideration	5
Make the call from somewhere else (e.g. work or someone else's phone)	6
Delay making the call from the mobile in order to make it from a landline	7
Search for an alternative landline number for the service and use it instead (where available).	8
Use an online means of making contact such as email, webchat, or social media (where available).	9
Decide not to make the call because I think it will be too expensive	10

ASK ALL

Q.33 Are there any NGNs in particular that you would tend to avoid using? **SHOW SCREEN. ALLOW MULTIPLE ANSWERS FOR OPTIONS 1-5.**

1800	1
1850	2
1890	3
0818	4
076	5
I would not avoid calling these numbers	6
Don't know	7

The Questionnaire



ASK THOSE WHO CODE 1 - 5 AT Q.33

Q.34 You said you would tend to avoid using (Q33 each number in turn). Would you avoid calling this number from a landline or mobile or from both landlines and mobiles?

	1800	1850	1890	0818	076
Landline	1	1	1	1	1
Mobiles	2	2	2	2	2
Both	3	3	3	3	3

ASK THOSE WHO CODE 1 - 5 AT Q.33

Q.35 You said you would not dial ___ numbers, why would you not dial these numbers?

SHOW SCREEN. ALLOW MULTIPLE ANSWERS

I have never heard of (INSERT AS APPROPRIATE) numbers	1
I know how much it costs per minute/per call and I think it's expensive	2
I don't know how much it costs per minute/per call but I avoid it because I think it's expensive	3
I do not call any NGNs	4
It becomes too expensive due to duration of the call	5
A previous telephone bill had an unexpectedly large cost for one of these numbers and because of that I prefer to avoid dialling NGNs	6
No need	7
Other (specify)	8

ASK FOR THOSE WHO CODE 2 OR 3 AT Q.35

Q.36 You said you would not dial ___ numbers because you think it is expensive. How much would the price per minute have to fall for you to start using these numbers again?

Answer in euro cents		
Don't know	1	

ASK FOR THOSE THAT ANSWER CODE 6 at Q 33

Q.37 You said you would not avoid dialling any NGNs, how much would the price for a one minute call have to increase for you to stop using these numbers altogether?

Answer in euro cents		
Don't know	1	



Could I have your full name please - just in case my supervisor needs to check my work?

I would like to assure you that this interview has been conducted in accordance with the Market Research Society's code of conduct.

In case you missed it earlier my name is _____ and I am from Behaviour and Attitudes in Dublin.

That's the end of the survey, thank you for your time and help.

Respondent Name _____

Address _____

Mobile No. _____

Landline No. _____

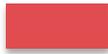
Interviewer Name: _____ **Number:** _____

I certify that this is a true, accurate and complete interview taken in accordance with my instructions, and conducted according to the guidelines set out in the ICC/ESOMAR

Appendices



Frequency of contacting businesses and organisations (regularly/occasionally/rarely) via various methods

 = Significantly higher vs total
 = Significantly lower vs total

Base: All adults aged 18+ (1,023)

	Total	Gender		Age					Social Class			Region			Decision Maker		Phone Ownership				
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Land line & Prepay	Land line & Prepay	Only	Only	
Base:	1023	499	524	98	178	316	263	168	430	547	46*	289	360	374	878	145	278	311	238	150	
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Call via mobile phone	78	80	77	72	85	86	75	64	81	77	74	71	82	81	79	77	72	81	88	87	
On-line (webchat, email, social media)	54	55	52	63	68	64	38	26	69	45	29	61	53	48	52	60	44	65	55	59	
Call via home landline telephone	49	46	53	27	31	45	65	79	54	44	64	61	47	42	51	42	70	75	14	17	
Letter (physical mail)	34	33	34	22	31	31	40	41	36	30	45	32	30	37	35	29	29	45	29	29	
Text-based service (e.g. SMS)	33	30	36	29	37	40	29	23	39	30	25	32	37	31	34	28	26	42	36	32	
Other	7	8	7	7	8	8	6	7	7	7	10	1	7	12	8	5	6	6	12	6	

* Caution small base size.
 ** Multiple responses allowed.

Awareness of prefixes x demographics

Base: All adults aged 18+ (1,023)

= Significantly higher vs total
 = Significantly lower vs total

	Total	Gender		Age					Social Class			Region			Decision Maker		Phone Owners				
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Landline & Prepay	Landline & Billpay	Prepay Only	Billpay Only	
Base:	1023	499	524	98	178	316	263	168	430	547	46*	289	360	374	878	145	278	311	238	150	
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	86	86	86	78	89	91	88	73	89	83	84	82	88	86	87	79	85	92	82	89	
1850	78	79	77	67	82	82	85	66	80	76	80	67	80	85	80	69	76	85	72	83	
1890	69	70	67	59	73	75	70	54	76	64	63	59	71	74	71	57	64	75	64	79	
0818	40	43	38	34	49	48	37	24	50	34	30	32	43	45	42	34	34	45	36	56	
076	16	19	13	12	17	20	17	8	19	15	6	15	17	17	17	10	13	18	19	16	
None of these	11	12	10	16	10	7	7	20	8	13	14	15	9	9	10	18	11	6	14	7	
- ANY NGN	89	88	90	84	90	93	93	80	92	87	86	85	91	91	90	82	89	94	86	93	

* Caution small base size.
 ** Multiple responses allowed.



Services accessed via NGNs

Base: All ever dialled NGNs (722)

	Total	Gender		Age					Social Class			Region			Decision Maker		Phone User			
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Landline & Prepay	Landline & Billpay	Prepay Only	Billpay Only
Base:	722	342	380	47*	125	249	193	108	340	355	27*	209	249	264	646	76	194	257	139	121
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Customer Care/Helpline	66	67	65	54	71	72	57	63	67	65	58	61	70	66	66	64	67	73	58	60
General company/customer enquiry	32	35	28	26	38	35	26	24	34	29	27	27	32	35	32	31	28	32	33	37
Government Service (e.g. water charges, revenue commissioners/tax, etc.)	28	27	29	19	30	33	29	19	33	25	11	24	24	35	29	21	24	30	27	34
Telephone banking	25	25	24	33	27	33	17	9	33	19	8	27	24	23	23	34	17	29	27	26
Product/service support	24	26	23	22	28	29	21	16	29	21	13	22	24	27	25	19	22	28	21	26
Product enquiry	18	20	16	10	19	19	19	17	20	15	25	15	14	23	19	12	17	16	22	18
Sales line/product purchase	14	15	12	12	19	15	13	5	16	13	10	11	13	16	14	14	11	12	15	21
Health service (e.g. DDoc)	14	13	15	15	16	11	14	15	15	13	13	12	11	17	14	14	14	13	17	12
Social Service (e.g. charities, support lines, etc.)	8	7	10	4	11	8	8	8	9	8	-	12	4	9	9	5	7	8	13	5
Marketing Campaign response line	6	7	5	4	8	6	8	3	7	6	6	5	4	10	6	7	6	4	8	9
Conference call number	3	5	2	3	3	4	5	1	4	4		6	2	2	3	3	2	5	3	3
Other (specify)	2	2	3	2	2	1	3	5	2	2	7	2	3	2	3		1	2	3	6
Can't remember	5	4	5	-	3	5	5	10	5	4	8	9	3	4	5	1	6	3	5	5

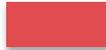
* Caution small base size.

** Multiple responses allowed.



How consumers typically make calls to NGNs x demographics

Base: All ever dialled NGNs (722)

 = Significantly higher vs total
 = Significantly lower vs total

	Total	Gender		Age					Social Class			Region			Decision Maker	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No
Base:	722	342	380	47*	125	249	193	108	340	355	27*	209	249	264	646	76
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Landline	33	27	38	19	17	25	44	66	32	31	59	39	29	32	33	31
Prepay Mobile Phone	28	30	26	48	30	28	25	17	18	38	16	22	28	32	28	28
Billpay Mobile Phone	32	36	30	30	49	38	21	13	41	26	22	26	40	31	32	33
Whichever is most convenient / Depends on which NGN I am dialling	5	6	4	2	3	6	8	3	7	3	3	9	3	4	5	7
Don't know	2	2	2	-	1	3	2	2	2	2	-	4	1	1	2	1

* Caution small base size.

** Multiple responses allowed.



NGNs associated with, 'Organisations can offer a lower call rate to customers using this NGN' x demographics

Base: All aware of NGN (919)

% Agree

 = Significantly higher vs total
 = Significantly lower vs total

	Total	Gender		Age					Social Class			Region 2			Decision Maker		Phone User				Dial ANY ...NGN	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Landline & Prepay	Land line & Billpay	Prepay Only	Billpay Only	Ever	Never
Base:	919	443	476	82	160	294	246	137	402	478	39*	248	329	342	799	120	249	295	205	140	722	197
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	33	36	31	24	29	38	36	33	30	36	39	29	30	39	35	25	35	37	29	32	37	22
1850	29	30	27	23	32	29	33	20	29	28	32	25	30	31	30	19	27	32	22	36	32	18
1890	23	24	23	21	25	25	24	18	26	23	7	17	27	24	25	12	20	23	22	31	26	14
0818	10	9	11	12	7	12	9	11	11	10	3	9	10	11	11	6	10	12	7	11	11	7
076	8	8	8	9	9	8	6	8	8	9	3	6	7	11	8	7	7	11	9	4	9	6
None of these	35	32	38	45	32	34	31	42	35	36	34	43	32	33	34	43	39	33	38	30	31	51
Don't know	8	6	9	12	9	5	6	10	7	8	6	5	11	6	6	16	7	6	10	5	6	15

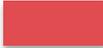
* Caution small base size.

** Multiple responses allowed.



NGNs associated with, 'This/these number(s) is/are free for people to call' x demographics

Base: All aware of NGN (919)

 = Significantly higher vs total
 = Significantly lower vs total

% Agree

	Total	Gender		Age					Social Class			Region			Decision Maker		Phone User				Dial ANY ...NGN	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Landline & Prepay	Landline & Prepay	Prepay Only	Billpay Only	Ever	Never
Base:	919	443	476	82	160	294	246	137	402	478	39*	248	329	342	799	120	249	295	205	140	722	197
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	43	46	39	29	49	47	42	36	47	40	34	40	47	42	44	35	39	54	35	46	48	22
1850	12	13	12	12	5	11	17	18	10	13	16	16	10	11	12	13	14	12	12	8	15	4
1890	8	9	7	6	3	8	11	12	9	8	5	10	11	4	8	6	8	9	5	9	9	3
0818	4	4	5	7	1	4	5	5	7	3	-	8	4	2	4	4	4	7	2	3	5	1
076	4	3	4	4	3	4	5	3	5	3	-	4	3	4	4	4	2	7	4	1	5	1
None of these	41	38	45	49	43	40	36	47	40	42	44	43	38	43	41	42	42	35	49	40	36	61
Don't know	6	5	7	11	5	4	6	7	5	7	8	3	9	6	5	14	6	5	6	5	4	13

* Caution small base size.

** Multiple responses allowed.



Q.8 Which NGN or NGNs, if any, do you associate with each of the following statements. You can mention as many or as few NGNs as you like per statement.

NGNs associated with, 'Organisations can make money from customers dialling these NGNs' x demographics

Base: All aware of NGN (919)

 = Significantly higher vs total
 = Significantly lower vs total

% Agree

	Total	Gender		Age					Social Class			Region			Decision Maker		Phone User				Dial ANY ...NGN	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Landline & Prepay	Landline & Billpay	Prepay Only	Billpay Only	Ever	Never
Base:	919	443	476	82	160	294	246	137	402	478	39*	248	329	342	799	120	249	295	205	140	722	197
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	30	30	29	36	26	31	29	29	26	32	34	30	29	30	30	29	27	26	38	28	29	33
1850	41	45	38	44	38	46	41	34	40	43	34	38	42	43	43	34	39	38	44	48	42	38
1890	41	44	39	43	40	46	40	35	40	42	43	37	39	46	43	32	39	39	45	48	42	38
0818	30	32	29	28	33	33	31	23	30	31	31	27	25	38	32	23	25	34	31	32	31	27
076	19	20	19	15	22	20	20	17	20	19	16	22	17	20	20	16	18	21	19	20	20	18
None of these	29	27	31	29	28	25	28	41	29	29	27	30	27	31	28	34	30	31	27	25	26	40
Don't know	9	8	10	13	11	7	7	10	9	10	6	6	14	7	8	16	9	7	11	7	8	14

* Caution small base size.
 ** Multiple responses allowed.



Cost implications of NGNs 'Free to call from mobile' x demographics

Base: All aware of NGN (919)

= Significantly higher vs total
 = Significantly lower vs total

% Agree

	Total	Gender		Age					Social Class			Region			Decision Maker		Phone Users				Dial ANY ...NGN	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Landline & Prepay	Landline & Billpay	Prepay Only	Billpay Only	Ever	Never
Base:	919	443	476	82	160	294	246	137	402	478	39*	248	329	342	799	120	249	295	205	140	722	197
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	33	35	30	29	40	33	32	25	38	30	21	29	36	32	33	31	29	35	34	38	36	23
1850	8	9	8	11	4	10	9	9	8	9	7	12	7	7	8	8	11	8	9	5	10	2
1890	5	5	5	5	3	6	5	8	5	5	6	8	5	3	6	2	5	7	4	4	6	1
0818	3	4	2	2	3	4	1	3	5	2	2	4	3	2	3	1	3	3	1	5	3	1
076	2	2	3	2	3	2	2	3	3	2	2	3	1	3	3	1	2	4	2	2	3	1
None of these	57	53	60	57	55	55	55	65	54	58	65	61	53	56	57	54	61	55	58	52	54	66
Don't know	5	5	6	9	4	5	5	6	3	7	5	2	7	6	4	11	4	4	6	6	4	10

* Caution small base size.

** Multiple responses allowed.

Cost implications of NGNs 'Free to call from landline' x demographics

Base: All aware of NGN (919)

 = Significantly higher vs total
 = Significantly lower vs total

% Agree

	Total	Gender		Age					Social Class			Region			Decision Maker		Phone User				Dial ANY ...NGN	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Landline & Prepay	Landline & Billpay	Prepay Only	Billpay Only	Ever	Never
Base:	919	443	476	82	160	294	246	137	402	478	39*	248	329	342	799	120	249	295	205	140	722	197
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	40	43	38	32	42	44	40	37	47	35	32	38	42	41	42	32	38	50	30	45	46	22
1850	11	10	12	12	8	10	15	10	11	11	10	15	9	10	11	9	13	12	8	9	12	6
1890	7	7	7	5	6	6	8	10	8	6	9	10	7	6	8	4	9	10	3	7	9	1
0818	3	2	4	3	2	4	3	5	5	2	2	5	3	3	4	2	2	6	1	3	4	1
076	3	4	3	3	4	4	4	4	4	3	2	4	1	5	4	2	2	6	3	2	4	1
None of these	46	43	48	49	45	45	43	50	41	49	46	49	43	46	45	48	46	39	58	39	41	62
Don't know	6	5	7	9	6	5	6	6	4	8	7	3	8	7	5	12	5	3	8	8	5	10

* Caution small base size.

** Multiple responses allowed.

Cost implications of NGNs 'Calls are charged per call' x demographics

Base: All aware of NGN (919)

 = Significantly higher vs total
 = Significantly lower vs total

% Agree

	Total	Gender		Age					Social Class			Region			Decision Maker		Phone User				Dial ANY ...NGN	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Landline & Prepay	Landline & Billpay	Prepay Only	Billpay Only	Ever	Never
Base:	919	443	476	82	160	294	246	137	402	478	39*	248	329	342	799	120	249	295	205	140	722	197
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	20	19	20	21	17	18	21	24	19	21	15	20	21	19	19	24	20	19	23	16	20	18
1850	32	34	31	35	36	33	32	23	35	30	35	29	35	33	32	37	32	32	34	34	34	28
1890	31	32	30	30	29	32	37	22	30	30	36	25	32	33	31	30	32	28	31	36	33	23
0818	19	20	19	19	20	20	20	18	19	20	14	22	14	22	19	20	21	16	20	23	21	12
076	13	13	13	11	14	12	13	13	13	13	12	11	10	16	12	14	13	11	12	15	14	8
None of these	40	39	41	39	37	38	39	52	40	40	39	50	33	39	41	34	42	46	38	27	38	48
Don't know	10	9	11	16	10	9	8	9	8	12	7	3	13	12	9	14	7	4	15	15	8	16

* Caution small base size.

** Multiple responses allowed.

Cost implications of NGNs 'Calls are charged per minute' x demographics

Base: All aware of NGN (919)

 = Significantly higher vs total
 = Significantly lower vs total

% Agree

	Total	Gender		Age					Social Class			Region			Decision Maker		Phone user				Dial ANY ...NGN	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Landline & Prepay	Landline & Billpay	Prepay Only	Billpay Only	Ever	Never
Base:	919	443	476	82	160	294	246	137	402	478	39*	248	329	342	799	120	249	295	205	140	722	197
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	26	26	26	31	26	23	22	30	26	25	36	27	21	28	26	25	26	24	28	22	24	32
1850	41	43	39	43	43	41	43	34	42	40	41	41	34	47	41	40	43	40	43	39	42	37
1890	42	43	40	39	44	41	43	37	43	40	47	39	35	49	42	39	39	42	42	41	41	42
0818	32	32	32	29	35	33	32	25	33	31	36	34	22	39	32	31	30	35	31	30	32	32
076	21	20	21	18	21	22	21	18	23	19	18	23	18	21	21	19	20	26	14	20	21	20
None of these	29	28	30	23	26	30	28	39	27	30	33	33	29	26	29	27	32	31	28	24	29	30
Don't know	10	10	11	16	9	10	9	10	8	13	5	5	15	10	10	14	8	7	14	12	8	17

* Caution small base size.

** Multiple responses allowed.

NGN Cost Perceptions of calling 1800 numbers x demographics

Base: All aware of specific 1800 NGN (881)

 = Significantly higher vs total
 = Significantly lower vs total

	Total	Gender		Age					Social Class			Region			Decision Maker		Phone User				Dial ANY ...NGN		Ever Dial 1800 Prefix	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Landline & Prepay	Landline & Billpay	Prepay Only	Billpay Only	Ever	Never	Ever	Never
Base:	881	426	455	77	158	287	233	126	385	458	38*	239	318	324	765	116	236	287	195	135	696	185	658	223
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I think they are expensive	30	27	33	35	31	32	29	22	27	32	32	31	33	27	30	28	23	25	43	30	24	50	24	46
I do not think they are expensive	34	38	30	28	40	33	32	35	38	31	31	34	39	30	35	29	36	37	29	36	40	12	40	16
I don't know whether they are expensive or not	27	25	29	28	23	26	29	30	27	26	30	25	20	34	26	30	34	29	19	24	27	28	26	29
I don't particularly care about the cost	7	8	6	7	5	7	7	9	6	8	5	9	5	7	7	7	5	8	7	8	8	3	8	3
Don't know	2	3	2	2	1	2	3	4	1	3	2	1	3	3	2	5	2	2	2	2	1	7	1	6

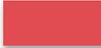
* Caution small base size.

** Multiple responses allowed.



NGN Cost Perceptions of calling 1850 numbers x demographics

Base: All aware of specific 1850 NGN (808)

 = Significantly higher vs total
 = Significantly lower vs total

	Total	Gender		Age					Social Class			Region			Decision Maker		Phone user				Dial ANY ...NGN		Ever Dial 1850 Prefix	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Landline & Prepay	Landline & Billpay	Prepay Only	Billpay Only	Ever	Never	Ever	Never
Base:	808	396	412	65	145	260	224	114	350	422	36*	196	293	319	708	100	213	267	174	125	638	170	569	239
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I think they are expensive	48	46	49	57	52	50	43	36	46	50	38	47	49	46	49	40	43	39	57	56	44	61	41	64
I do not think they are expensive	16	16	16	12	16	16	16	18	19	13	20	16	20	13	16	17	18	18	12	17	18	8	20	7
I don't know whether they are expensive or not	28	28	27	20	26	26	31	35	27	27	40	27	23	33	28	29	32	32	23	20	29	24	30	23
I don't particularly care about the cost	7	8	6	9	5	7	8	8	7	7	3	10	6	6	6	9	6	10	6	6	9	1	9	2
Don't know	2	2	2	2	1	2	2	3	1	3	-	-	2	3	1	4	2	1	2	2	1	5	1	4

* Caution small base size.
 ** Multiple responses allowed.



Q.10 Thinking about [insert NGN aware of from Q3] please indicate which statement you associate most with this number.



NGN Cost Perceptions of calling 1890 numbers x demographics

Base: All aware of specific 1890 NGN (710)

 = Significantly higher vs total
 = Significantly lower vs total

	Total	Gender		Age					Social Class			Region			Decision Maker		Mobile user				Dial ANY ...NGN		Ever Dial 1890 Prefix	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Landline & Prepay	Landline & Billpay	Prepay Only	Billpay Only	Ever	Never	Ever	Never
Base:	710	353	357	59	130	239	186	96	325	356	29*	172	258	280	627	83	182	233	151	120	570	140	458	252
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I think they are expensive	52	51	54	56	52	55	51	46	50	56	42	52	51	54	54	44	47	48	61	55	49	67	46	63
I do not think they are expensive	13	15	12	13	14	11	16	14	15	12	14	11	18	11	13	13	15	13	10	19	16	4	17	6
I don't know whether they are expensive or not	26	25	27	21	26	26	27	30	28	23	38	28	23	28	26	27	32	29	19	20	27	21	28	23
I don't particularly care about the cost	6	6	5	7	7	5	6	6	5	7	5	8	6	5	5	11	3	9	7	4	7	1	8	3
Don't know	2	3	2	3	3	2	1	5	1	3	-	1	3	2	2	5	3	1	3	2	1	7	1	5

* Caution small base size.
 ** Multiple responses allowed.



Q.10 Thinking about [insert NGN aware of from Q3] please indicate which statement you associate most with this number.

NGN Cost Perceptions of calling 0818 numbers x demographics

Base: All aware of specific 0818 NGN (413)

 = Significantly higher vs total
 = Significantly lower vs total

	Total	Gender		Age					Social Class			Region			Decision Maker		Phone user				Dial ANY ...NGN		Ever dial 0818 Prefix	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Landline & Prepay	Landline & Billpay	Prepay Only	Billpay Only	Ever	Never	Ever	Never
Base:	413	209	204	35	85	153	97	43	213	187	13*	92	154	167	366	47*	95	141	83	84	344	69	225	188
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I think they are expensive	51	48	55	53	53	47	61	41	52	50	64	46	46	58	53	43	45	46	58	56	49	63	48	55
I do not think they are expensive	10	9	11	14	6	12	9	15	13	8	-	12	14	6	10	10	15	10	5	12	11	6	13	7
I don't know whether they are expensive or not	27	28	26	25	27	29	24	32	27	28	30	26	28	27	27	29	30	30	25	23	28	25	28	27
I don't particularly care about the cost	9	10	7	6	11	8	6	13	7	11	6	16	7	6	8	13	7	11	11	6	10	-	12	5
Don't know	3	5	1	2	3	5	1	-	2	4	-	-	4	3	3	5	3	3	2	4	2	6	-	6

* Caution small base size.
 ** Multiple responses allowed.



NGN Cost Perceptions of calling 076 numbers x demographics

Base: All aware of specific 076 NGN (168)

 = Significantly higher vs total
 = Significantly lower vs total

	Total	Gender		Age					Social Class			Region			Decision Maker		Phone user				Dial ANY ...NGN		Ever Dial 076 Prefix	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Landline & Prepay	Landline & Billpay	Prepay Only	Billpay Only	Ever	Never	Ever	Never
Base:	168	94	74	12*	32*	65	44*	15*	80	85	3*	43*	61	64	153	15*	39*	58	44*	25*	141	27*	87	81
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I think they are expensive	31	31	32	36	31	31	37	16	32	33	-	28	44	23	32	25	31	25	33	41	28	46	29	34
I do not think they are expensive	21	19	24	27	27	19	22	6	20	24	-	19	15	27	21	22	27	25	16	17	23	14	22	20
I don't know whether they are expensive or not	33	31	35	30	25	35	32	50	38	26	68	24	32	39	32	38	35	33	34	28	32	34	29	37
I don't particularly care about the cost	11	14	8	7	9	12	8	28	10	12	32	28	6	5	12	6	8	12	16	8	14		20	3
Don't know	4	5	1	-	7	4	2	-	1	6	-	2	3	5	3	9	-	6	2	7	3	6	-	7

* Caution small base size.
 ** Multiple responses allowed.



Awareness of costs per minute/per call when making calls to NGNs x demographics

Base: All adults aged 18+ (1,023)

 = Significantly higher vs total
 = Significantly lower vs total

	Total	Gender		Age					Social Class			Region			Decision Maker		Dial ANY ...NGN		Typically call NGNs from ...		
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Ever	Never	Land line	Prepay Mobile	Billpay Mobile
Base:	1023	499	524	98	178	316	263	168	430	547	46*	289	360	374	878	145	722	197	248	193	232
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes, I know all of them	2	2	2	2	2	3	2	1	2	2	-	2	2	2	2	1	2	2	2	4	1
Yes, I know some of them	12	15	9	7	13	14	16	6	12	12	13	12	13	12	13	8	15	6	12	16	16
No I don't know any	86	82	89	92	85	83	82	93	86	85	87	86	86	86	85	91	83	92	87	80	83

* Caution small base size.



Why never looked up pricing information to find out the price of a call to landlines

Base: All did NOT look up landline call costs

= Significantly higher vs total
 = Significantly lower vs total

	Total	Gender		Age					Social Class			Region			Decision Maker		Typically Call NGNs from ...			Dial ANY ...NGN	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Land line	Prepay Mobile	Billpay Mobile	Ever	Never
Base:	952	458	494	92	169	299	235	157	399	510	43*	255	345	352	817	135	220	182	215	661	189
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I had no alternative but to ring the number so cost was irrelevant	21	20	22	27	24	20	20	17	21	22	10	22	21	21	21	21	20	22	31	25	17
The cost is included in my call package of free telephone minutes/calls so I do not need to look up the cost information	20	21	18	12	23	22	20	15	23	18	12	23	24	14	21	14	25	18	20	21	14
I do not know how much it costs per minute/per call but didn't intend to be on the call for very long	12	11	13	10	11	13	12	12	12	11	11	13	11	12	12	12	9	16	12	12	9
I would not know how or where to look up call costs to an NGN	12	11	13	9	9	11	17	14	12	11	21	8	9	17	12	14	16	11	13	13	10
I still call these numbers and I am not concerned about the price/cost of calls	9	10	9	8	10	6	8	16	9	8	19	11	11	7	9	11	11	11	9	10	6
I know how much it costs per minute/per call	6	7	5	6	7	8	7	4	6	6	11	7	6	6	7	4	6	9	5	7	6
I didn't think organisations who use NGNs would have an alternative number	5	5	6	2	8	6	6	2	7	5	2	7	4	6	6	3	7	4	6	6	6
I look up the cost afterwards (e.g. on monthly bill) to check price	3	3	3	4	1	4	3	2	3	3	2	3	1	4	3	2	4	5	4	4	1
Other (please write in)	8	7	8	4	9	6	8	11	8	7	11	7	6	9	7	9	8	5	9	7	6
Don't call these numbers	16	15	16	27	11	15	15	17	13	18	14	12	18	17	15	22	5	15	6	9	35

* Caution small base size.

** Multiple responses allowed.



Q.26 Why have you never looked up pricing information to find out the price of a call to [Insert Landline numbers/NGNs/Mobile numbers as appropriate from Q.21]?



Why never looked up pricing information to find out the price of a call to NGNs

Base: All did NOT look up NGN call costs

= Significantly higher vs total
 = Significantly lower vs total

	Total	Gender		Age					Social Class			Region			Decision Maker		Typically Call NGNs from ...			Dial ANY ...NGN	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Land line	Prepay Mobile	Billpay Mobile	Ever	Never
Base:	980	468	512	95	172	300	253	160	416	519	45*	273	345	362	838	142	232	184	221	684	193
I had no alternative but to ring the number so cost was irrelevant	26	26	26	25	34	27	24	17	28	25	17	22	29	26	26	26	26	37	39	33	14
I would not know how or where to look up call costs to an NGN	15	15	15	12	12	16	17	17	14	16	16	11	16	17	15	14	19	15	16	16	11
I do not know how much it costs per minute/per call but didn't intend to be on the call for very long	11	10	13	7	11	13	11	12	12	10	15	16	7	12	11	10	13	12	15	14	7
I still call these numbers and I am not concerned about the price/cost of calls	9	8	9	5	11	6	10	10	9	8	6	12	8	7	9	7	15	10	10	11	2
The cost is included in my call package of free telephone minutes/calls so I do not need to look up the cost information	8	9	6	6	6	10	9	6	9	7	2	9	9	5	8	4	7	7	12	9	5
I didn't think organisations who use NGNs would have an alternative number	7	6	8	8	8	6	8	6	8	7	5	8	5	8	7	6	7	12	8	9	4
I know how much it costs per minute/per call	4	4	3	4	3	3	5	2	3	4	6	5	2	4	4	2	4	6	2	4	2
I look up the cost afterwards (e.g. on monthly bill) to check price	4	3	4	5	2	4	3	4	5	3	4	3	4	5	4	4	6	4	5	5	1
Other (please write in)	6	5	6	1	5	5	7	9	6	5	4	5	4	8	6	5	6	4	7	6	5
Don't call these numbers	23	24	22	33	17	22	22	26	17	27	32	23	28	19	22	28	9	8	4	8	55

* Caution small base size.

** Multiple responses allowed.

Q.26 Why have you never looked up pricing information to find out the price of a call to [Insert Landline numbers/NGNs/Mobile numbers as appropriate from Q.21]?



Why never looked up pricing information to find out the price of a call to mobiles

Base: All did NOT look up mobile call costs

= Significantly higher vs total
 = Significantly lower vs total

	Total	Gender		Age					Social Class			Region			Decision Maker		Typically Call NGNs from ...			Dial ANY ...NGN	
		Male	Female	18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Other Urban	Rural	Yes	No	Land line	Prepay Mobile	Billpay Mobile	Ever	Never
Base:	923	443	480	87	160	284	236	156	387	494	42*	240	335	348	792	131	221	168	210	641	184
I had no alternative but to ring the number so cost was irrelevant	23	23	23	18	28	21	25	19	24	22	16	24	24	20	23	22	23	26	29	26	18
The cost is included in my call package of free telephone minutes/calls so I do not need to look up the cost information	21	23	19	22	22	23	23	11	24	20	5	22	28	14	21	18	18	24	25	22	15
I would not know how or where to look up call costs to an NGN	11	11	10	6	10	11	11	16	10	11	17	7	10	14	11	10	15	8	14	12	9
I do not know how much it costs per minute/per call but didn't intend to be on the call for very long	10	9	11	3	11	10	11	10	9	10	15	12	6	11	10	8	13	10	12	12	5
I still call these numbers and I am not concerned about the price/cost of calls	10	9	10	6	9	8	9	16	9	10	13	13	7	10	10	8	15	8	8	11	7
I know how much it costs per minute/per call	7	7	7	14	5	8	7	4	6	8	7	9	7	6	7	9	5	9	4	6	10
I didn't think organisations who use NGNs would have an alternative number	6	5	6	5	8	5	7	3	7	5	2	6	6	5	6	3	7	10	6	8	2
I look up the cost afterwards (e.g. on monthly bill) to check price	4	2	5	5	3	5	4	2	5	3	2	2	4	5	4	4	4	5	5	5	1
Other (please write in)	6	7	4	4	6	5	6	9	6	6	9	6	4	7	6	4	6	5	5	5	4
Don't call these numbers	13	13	13	19	6	12	15	20	8	16	22	7	14	17	12	20	5	9	3	6	32

* Caution small base size.

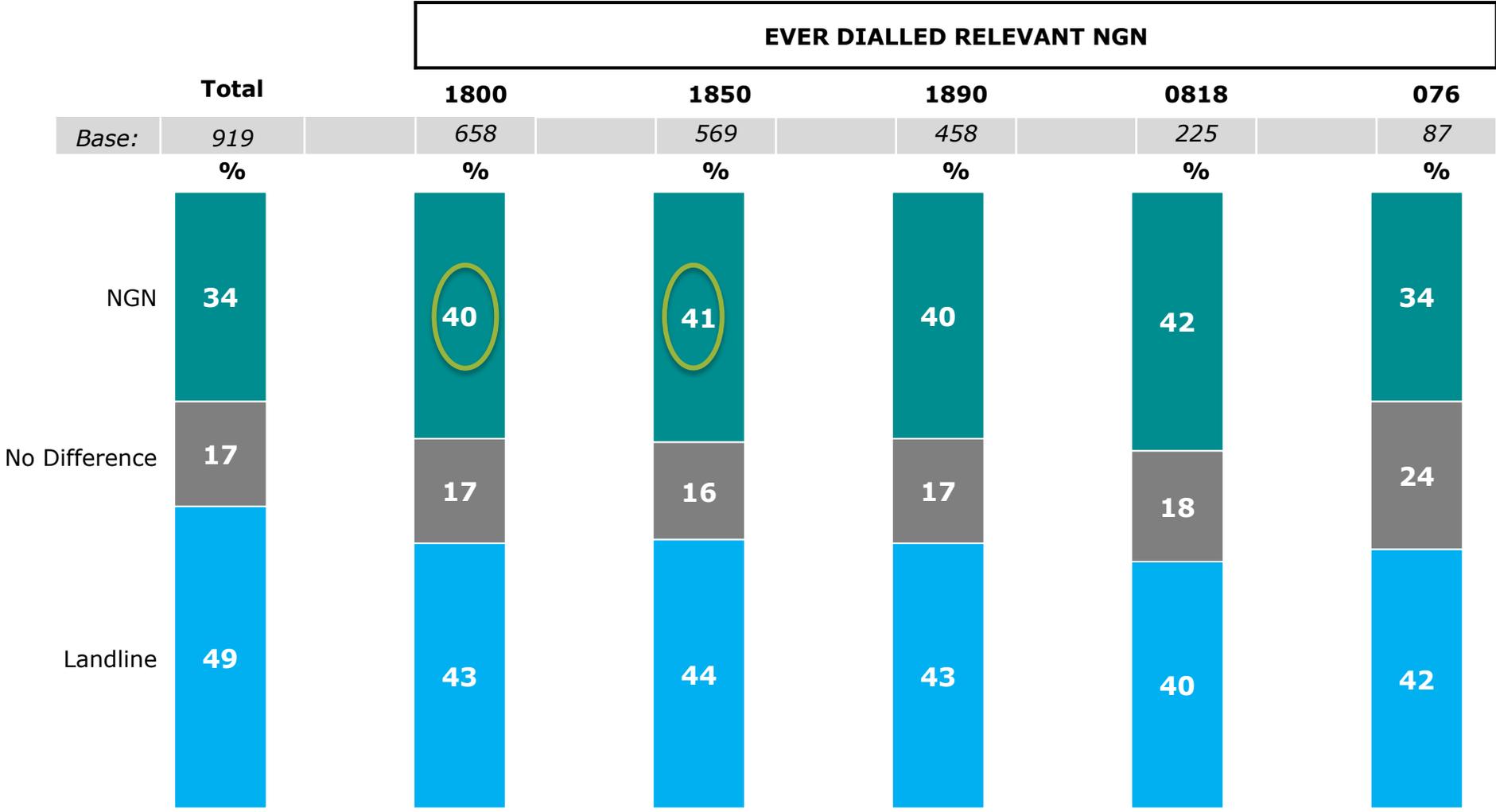
** Multiple responses allowed.

Q.26 Why have you never looked up pricing information to find out the price of a call to [Insert Landline numbers/NGNs/Mobile numbers as appropriate from Q.21]?



Attitudes towards NGN vs Landline business usage: 'I find these numbers easier to remember'

Base: All aware of NGN –(919)



Those ever dialling 1800 and 1850 are more likely to cite that they find NGN numbers easier to remember.

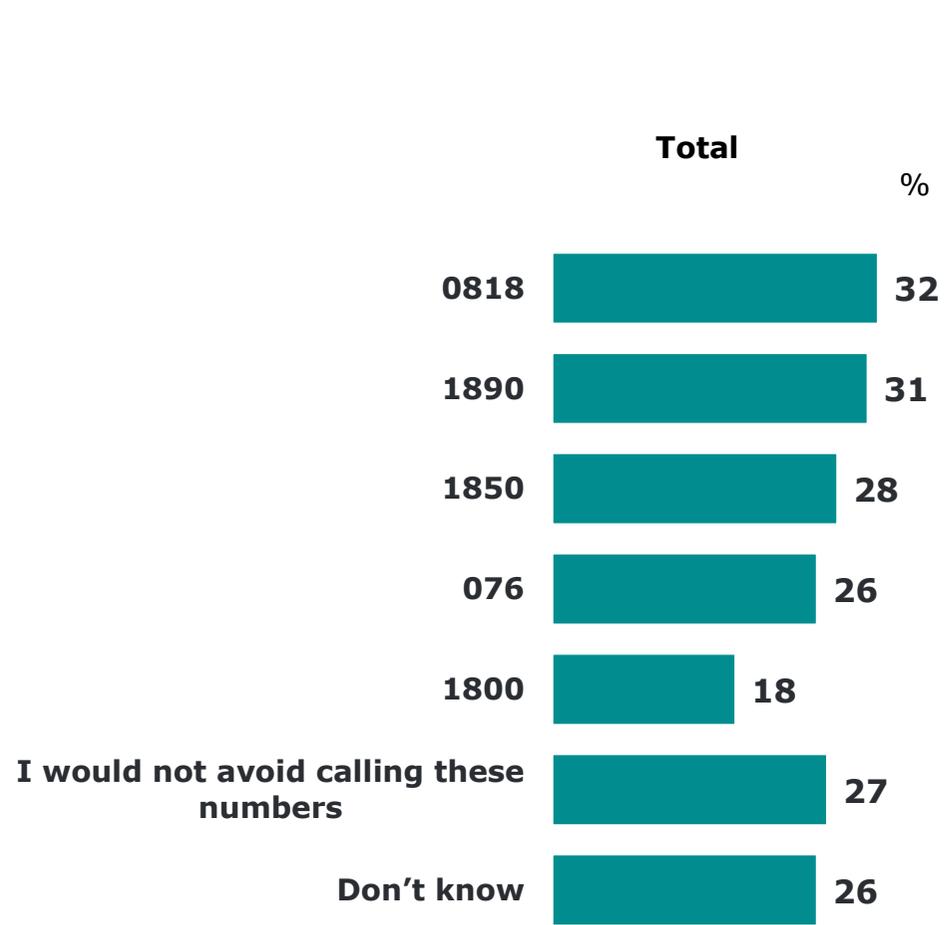


Q.28 For each statement please indicate whether you associate this more with calls to landlines, calls to NGNs or whether there is no difference? ...I find these numbers are easier to remember

NGNs that consumers avoid using

Base: All adults aged 18+ (1,023)

■ = Significantly higher vs total
■ = Significantly lower vs total



Total	Region			
	Dublin	Leinster	Munster	Conn/Ulster
	289	263	300	171
	%	%		%
32	28	30	28	50
31	23	29	32	48
28	21	30	29	35
26	23	25	26	33
18	15	20	19	21
27	24	32	29	21
26	36	22	27	16

Higher levels of avoidance of 1890 and 0818 numbers in Conn/Ulster region.

** Multiple responses allowed.



THANK YOU

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