Numbering Review

Report of Market Research Findings

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Contents

Introduction

As part of the evidence base for Ofcom's strategic review of telephone numbering[1] a programme of consumer research was commissioned to provide a comprehensive understanding of attitudes and behaviours associated with UK telephone numbers among residential and business consumers.

Section 1

Executive Summary

Mobile phone handsets are the primary means of storing telephone numbers

1.1 Qualitative research suggested that residential consumers throughout the UK were quite similar in the way they stored and accessed telephone numbers. Eight in ten residential consumers with a mobile phone said that they used the memory facility on their mobile phone to store telephone numbers.

1.2 Fixed line handsets were used less frequently to store telephone numbers. 36% of residential consumers said that they used this method and 54% of business consumers.

1.3 Regularly called numbers such as those of friends and family are often memorised. Residential consumers estimate that, on average, 47% of their calls from a fixed line phone was made by recalling the number from memory.

Consumers tend to over-estimate the costs of calling all number types, but broadly understand the cost hierarchy

1.4 When asked how much calls to different number types cost, residential consumers tended to over-estimate the cost of calls to all number types. Broadly speaking, consumers appear to understand the *relative* cost differentials: 64% recognise 0800 numbers as free to call from fixed line phones and estimates of the cost of calling other number types were ranked broadly correctly, with normal geographic landline numbers being perceived the cheapest to call and 09 premium rate numbers perceived most expensive. Consumers made relatively little distinction between prices for calls to 0844, 0845, 0870 and 0871.

1.5 There is a clear correlation between estimated call cost and likelihood to call number types. Residential consumers are less likely to call numbers that they perceive to be more expensive to call and/or are unfamiliar to them.

Distinction between fixed and mobile numbers was valued primarily for identifying call costs, but also on a social level

1.6 There was a mixed response, amongst both residential and business consumers, to the importance of having geographic significance attached to fixed line numbers. 43% of business consumers and 46% of residential consumers said that they would be concerned if the ability to identify location was lost. On the other hand, 39% of business and 37% of residential consumers said that they would be unconcerned.

[1] *Telephone Numbering – Safeguarding the future of numbers,* http://www.ofcom.org.uk/consult/condocs/numberingreview/

1.7 Those who appeared to value geographic significance gave a number of emotional and practical reasons for this, including it being 'nice to know' and for businesses using it to identify where a customer is located.

1.8 Residential and business consumers were both more concerned (69% and 70% respectively) about the potential loss of the ability to distinguish between fixed phone and mobile telephone numbers.

1.9 The primary reason for valuing the distinction between fixed and mobile numbers was related to identifying call costs. Business and residential consumers felt that this distinction was a key indicator of cost because of the perceived difference in the cost of calling fixed and mobile phones. The distinction was also valued on a social level, as calling behaviours could differ depending on whether a fixed phone or mobile phone is being called.

Numbering changes are inconvenient to residential and business consumers

1.10 The qualitative research found that numbering changes were inconvenient and can be costly to residential and business consumers. Businesses that experienced a number code change in the year 2000 estimated that the cost to their business was an average of around £5,000. Updating stationery and loss of business were the highest estimated costs.

1.11 The costs to residential consumers of a number code change are more related to stress and annoyance than tangible financial costs. 63% of residential consumers said that a local area code change would be annoying and 40% said that it would be stressful. In a hypothetical situation where telephone companies offered residential consumers a one-off payment in return for agreement to change their phone number, residential consumers said that they would have to be offered £600 on average before they would agree.

6 in 10 businesses expressed interest in having a single number for fixed and mobile phones

1.12 The idea of a single personal telephone number for a fixed and mobile phones was more appealing to businesses (59% interested) than residential consumers (38%). A permanent number for employees appealed to two-thirds (66%) of businesses who said that they were interested in this idea.

When prompted, 88% of residential consumers say that they would use information about the cost of different call types

1.13 9 in 10 (88%) residential consumers said they would use information sources about the cost of different call types, with the most popular prompted source being the inside cover of the phone book (64% said they would use this information source).

Section 2

Background & Objectives

2.1 The key areas of investigation included:

- Techniques used to remember and recall telephone numbers;
- Awareness of the cost of calling different number types;
- Consumer use of and value attached to the information associated with different telephone number types;
- Consumer responses to possible options in the event of geographic areas running out of telephone numbers;
- Attitudes towards numbering changes and measuring the cost of numbering changes;
- Interest in permanent and cross-platform telephone numbers

Approach

2.2 This report summarises the findings from an extensive programme of market research, conducted by independent agencies, in accordance with Market Research Society guidelines. In total, almost 5,000 residential and business consumers took part in the research. The report was written in conjunction with Futuresight, the lead independent market research agency for Ofcom's research programme.

2.3 A combination of qualitative and quantitative methods was used; details are shown in the figure 2.1.

Figure 2.1 Summary of research methodologies

Research overview	Fieldwork date	Methodology	Sample Details	Research agency
Qualitative research into views on local dialling and geographic numbering	March 2005	Focus Groups	18 Groups with business and adult residential consumers in Glasgow, Biddulph (Stoke on Trent), Swansea, Belfast and Leeds.	Futuresight
Quantitative research into views on local dialling and geographic numbering	April – May 2005	Combination of Face to face interviews (Residential) and Telephone (Business and Northern Ireland).	1133 interviews with a representative sample of UK residential consumers and 400 interviews with UK businesses of all sizes.	Futuresight with ICM Research and Perspective
Qualitative research into understanding of and attitudes towards current telephone numbering plan	June 2005	Focus Groups	32 Groups with business and residential consumers (aged 14 – 65) in London, Edinburgh, Manchester, Redditch, Cardiff and Belfast	Futuresight
Quantitative research into understanding of and attitudes towards current telephone numbering plan	July 2005	Telephone Interviews	1000 interviews with GB residential consumers and 400 interviews with UK businesses of all sizes. Larger businesses were over-sampled then the whole sample was weighted to reflect the actual profile of UK businesses.	Futuresight and ICM Research
Quantitative research into issues identified during the project's analysis	October – November 2005	Telephone interviews in omnibus survey	1000 UK adults aged 16+	ICM Research

Measuring the costs to businesses of a number code change	November 2005	Telephone interviews	400 businesses in areas that had a number code change in the year 2000. Larger businesses were over-sampled then the whole sample was weighted to reflect the actual profile of UK businesses.	Futuresight and ICM Research

Section 3

Telephone use and techniques used to recall telephone numbers

Introduction

3.1 In order to better understand the ways consumers use, access and recall telephone numbers respondents were asked about their use of number memory facilities on mobile phone and fixed line phone handsets.

3.2 The qualitative research suggested that residential consumers throughout the UK were generally similar in the way they stored and accessed telephone numbers. The vast majority said they used their mobile phone memory as the primary means of storing telephone numbers. For the remaining minority, a combination of paper address book, their own memory and the fixed line memory was used.

3.3 There were some differences between fixed and mobile handsets in terms of how consumers accessed and dialled numbers.

3.4 When using a mobile, consumers generally searched the phone's memory for a name and the number would be automatically dialled. The most regular numbers, however, would often be recalled and manually dialled.

"I use the memory most of the time, but for some of my friends I just dial in the number, it's quicker" (16-17 Female).

3.5 When using a fixed line, regular numbers tended to be recalled or accessed via the mobile memory or paper address book. Fixed line numbers were usually manually dialled, apart from a minority of adults who used the memory facility and / or speed dialling.

3.6 The increasing use of mobiles and the mobile memory facilities appears to have impacted consumers in terms of

- Perceived efficiency

"Gone are the days of scraps of paper getting lost, now all numbers go straight into the mobile" (25+)

"Yes, things have changed – I'm much more organised that I used to be" (18-24)

- Reduced need / ability to recall numbers

"I used to remember loads of numbers, but now I can barely remember my own number" (25+)

"Certainly, it's made us lazy, I never remember anyone's number it goes straight into the memory under their name" (18-24).

Platform (fixed / mobile) used when making telephone calls

3.7 Fixed line and mobile usage differed significantly by age among residential users. Over 45% of 16-24 year olds said that they use a mobile phone exclusively, 70% of 25-64 year olds said they used both fixed and mobile phones, and 63% of over 65 year olds said they used a fixed line only.

3.8 Exclusive use of fixed line phones (with no use of mobile phones for business calls) was higher among smaller businesses: 38% of businesses with 1-9 employees, and 38% of those with 10-249 employees, compared with just 10% of larger businesses.

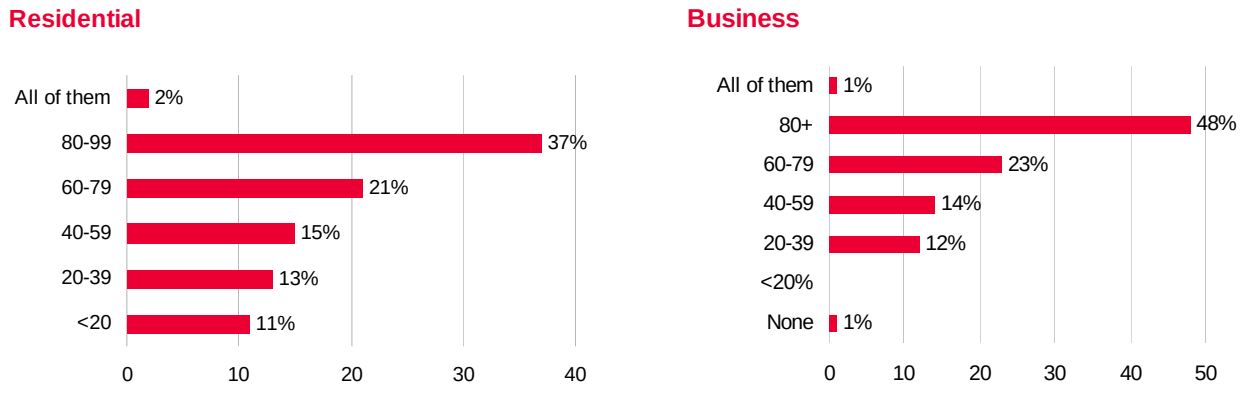
Proportion of telephone calls made from a fixed line

3.9 Consumers with fixed and mobile phones perceived and estimated that fixed line calls made up the greater proportion of both residential and business calls. On average, residential users estimated that they make 63% of their calls from a fixed line phone compared with 71% estimated by businesses.

3.10 The claimed proportion of calls made from a fixed line increases with the age of residential users the size of the company. Large companies with more then 250 employees say they made the most calls from a fixed line, an average of 79%.

Figure 3.1 Estimated proportion of calls made from fixed line phone

Q. Roughly what proportion of your telephone calls do you make from a fixed line?
Q. Roughly what proportion of telephone calls do employees make from a fixed line?



Base: Residential consumer with a fixed phone and mobile phone, n = 673; Business consumers whose employees use fixed and mobile phones, n = 243

Use of a memory facility on a fixed line telephone(s) to store numbers

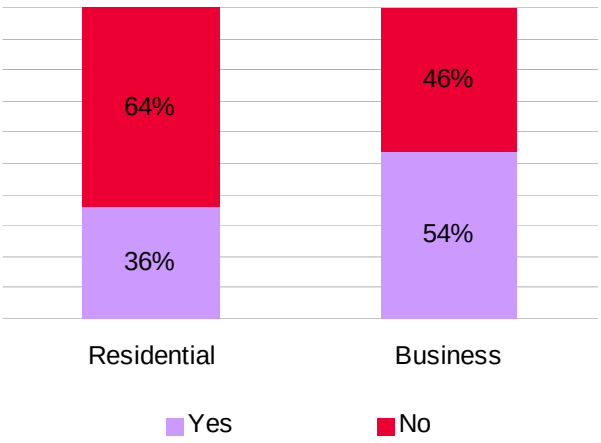
3.11 54% of businesses said that they use a memory facility on their fixed line phones, such as speed-dial, compared with 36% of residential consumers.

3.12 Claimed use of memory facilities and speed dialling on fixed line phones was more frequent amongst larger businesses.

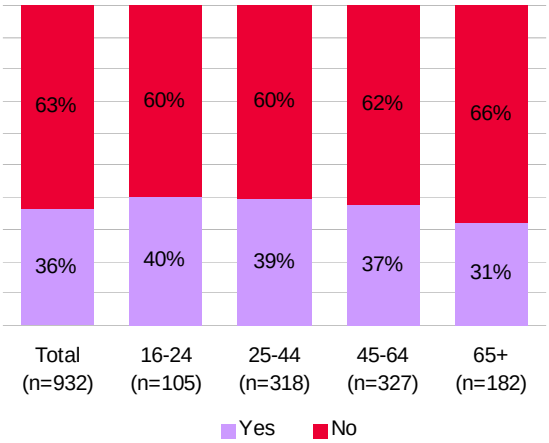
3.13 Residential consumer usage was more limited than business. In the qualitative research, the complexity of the fixed line handset (compared with mobiles) was often mentioned as a barrier.

Figure 3.2 Use of memory facility on fixed line phones

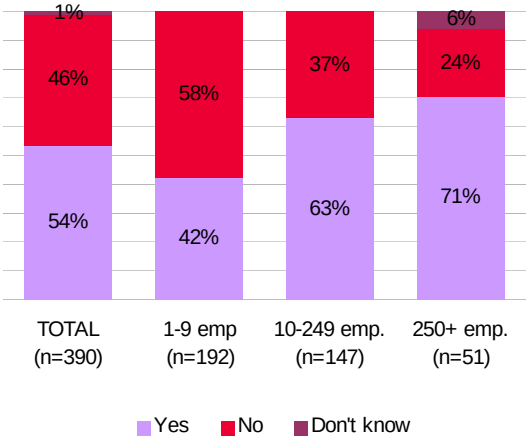
Q. On your fixed line telephone do you use the memory facility that allows you to store telephone numbers so that you do not have to dial the number yourself?
Q. On your company's fixed line telephone(s) do employees use the memory facility/ speed dialling that allows storage of telephone so the number does not have to be dialled manually?



Residential: Use of memory facility on fixed line by age



Business: Use of memory facility on fixed line - by business size



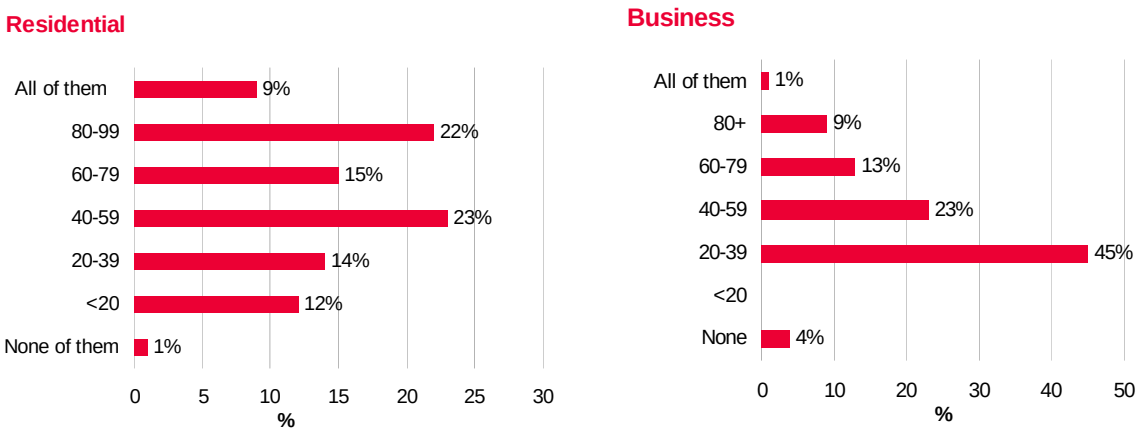
Proportion of fixed line calls made using the memory facility

3.14 Residential consumers make use of memory facilities more regularly than businesses.

3.15 The qualitative research found that residential users tended to call the same numbers from their fixed line (typically family and friends) and once these were stored, the memory facility was used frequently. Businesses on the other hand tended to call a much wider range of numbers, in addition to those that were stored in the memory.

Figure 3.3 Claimed proportion of calls made using the memory facility on fixed line phones

Q. Roughly, what proportion of your fixed line calls is made using this memory facility?
Q. Roughly, what proportion of your company's fixed line calls is made using the memory facility?



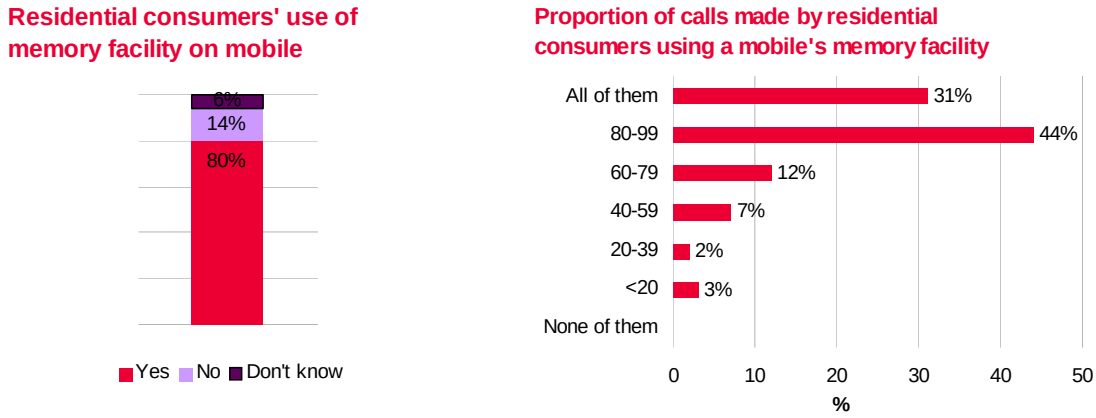
Base: Residential consumers who use a memory facility on their fixed phone, n = 339; Business consumers whose employees use memory facilities on their fixed phones, n = 212.

Residential consumers' use of a memory facility on a fixed line telephone to store numbers

3.16 Use of mobile phone memories was widespread, and more common than use of fixed phone memory facilities to store telephone numbers. 80% of residential mobile users said they make calls using their mobile memory and an average of 85% of their calls is made using this facility.

Figure 3.4 Claimed proportion of calls made by residential consumers using the memory facility on mobile phones

Q. Do you use the memory feature on your mobile handset that allows you to call people by selecting their name from the phone handset menu without dialling their number?
Q. Roughly, what proportion of all the calls you make from your mobile phone is made using the memory facility?



Base: Residential consumers who have a mobile phone, n = 926; Residential consumers who use the memory facility, n = 748.

Calls made by personally recalling the number, when using a mobile and a fixed line

3.17 Regularly used numbers, such as friends and family, were often memorised. Of those residential consumers using a fixed line, an estimated average of 47% of all calls were made by recalling numbers from memory, compared to an estimated average 34% of all calls made from a residential mobile users.

Section 4

Awareness of call costs and hesitancy to call numbers

Introduction

4.1 In order to assess the current level of consumer understanding of, and confidence in, the numbering plan, residential consumers were asked how much they thought telephone numbers with different prefixes cost to call, whether they might avoid calling some number types and whether they made a distinction between 0844 and 0845, and 0870 and 0871.

Estimated cost of calling different number types

4.2 As shown in figure 4.1, residential consumers tend to over-estimate the cost of calls to most number types. However, broadly speaking, consumers appear to understand the *relative* cost hierarchy of number types: 64% recognised 0800 numbers as free to call and the other number types were on average ranked broadly correctly, with normal landlines being perceived the cheapest to call and 09 premium rate numbers perceived most expensive. However consumers perceived relatively little difference in the costs of calling 0844, 0845, 0870 and 0871 numbers.

4.3 The proportion claiming that they don't know how much 084x and 087x numbers cost to call has fallen from August 2004. This is consistent with some media coverage in the last year, relating to consumer concerns about the cost of calling these numbers, which could have increased awareness of the numbers.[2]

[2] Note that the apparent increase in perceived price from the August 2004 findings (published as part of the *NTS: Options for the future* consultation) is due to a change in the way the mean score was calculated. The more recent survey captured actual amounts respondents thought it would cost to call, whereas the mean score in previous research was based on mid-points of range estimations.

Figure 4.1 Estimated cost of calling different number types from a landline during the daytime on a weekday

Q. How much do you think it costs per minute to call the following types of telephone numbers from your landline phone at home during the weekday?

Proportions highlighted in red indicate broadly correct estimations (based on BT Together Option 1 tariff and numbering plan).

Pence Per Min.	Normal landline	Mobile phone	0800	0844	0845	0870	0871	09
Free	3%	1%	64%	3%	4%	2%	3%	1%
1-5p	49%	10%	10%	16%	21%	15%	14%	14%
6-10p	19%	13%	4%	16%	15%	16%	15%	9%
11-25p	13%	25%	4%	17%	15%	17%	17%	12%
26-50p	6%	32%	6%	19%	18%	19%	19%	21%
51p-£1	2%	10%	4%	10%	9%	13%	13%	18%
£1+	1%	2%	2%	4%	4%	4%	3%	11%
Don't know	7%	8%	7%	16%	13%	14%	15%	14%
Mean (including free)	14ppm	35ppm	11ppm	35ppm	34ppm	37ppm	36ppm	56ppm
Median (including free)	5ppm	25ppm	Free	20ppm	16ppm	20ppm	20ppm	40ppm
Actual cost (based on BT Together Tariff/ numbering plan)	3ppm	12.6ppm -24ppm	Free	Up to 5ppm or call*	3ppm	7.5ppm	Up to 10ppm or call**	10ppm - £1.50pm (or per call)***

Base: UK adults, October 2005, n =1067
** Based on numbering plan.*
*** Based on numbering plan. 6-10ppm rated as correct as likely 'real'' cost.*
**** Based on numbering plan.*

Hesitancy to call different types of phone numbers

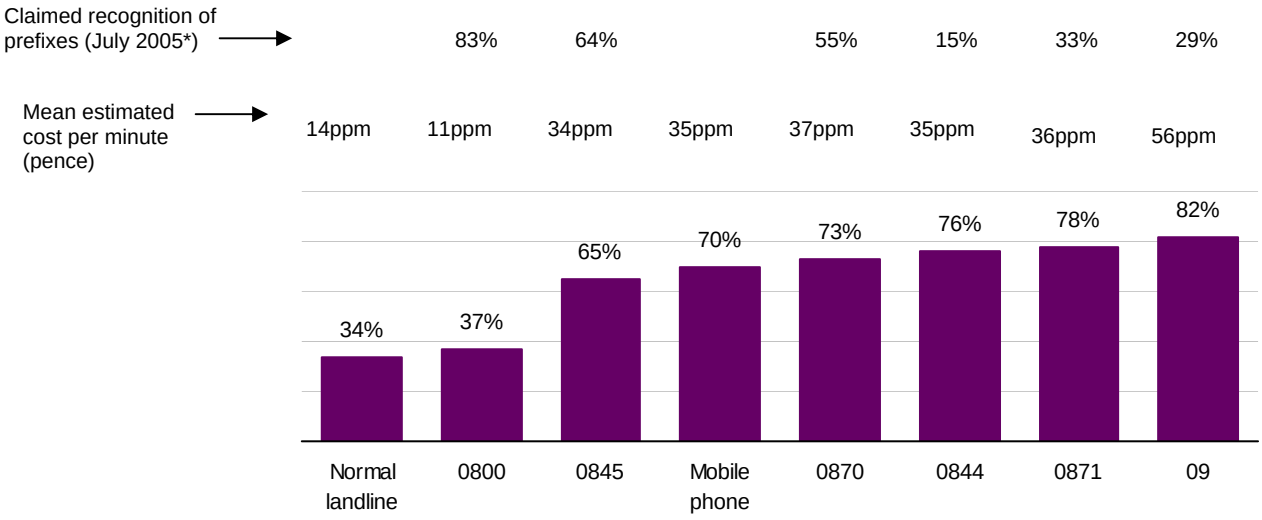
4.4 Residential consumers were asked how likely they would be to respond by telephone to an advertisement for something they were interested in. The scenario was repeated for a variety of different number types.

4.5 There is a fairly clear correlation between estimated cost and likelihood to call, with residential consumers saying they are less likely to call numbers that they estimate to be more expensive. There also appears to be some relationship between claimed recognition and likelihood to call, with consumers more likely to call number types that are familiar to them.

Figure 4.2 Estimated cost of calling different number types from a landline during the daytime on a weekday

Q. If you saw a phone number on an advert for something that you were interested in how likely or unlikely would you be to call the number if it was…

Columns show the proportion that said they were certain not to, very unlikely or fairly unlikely to call



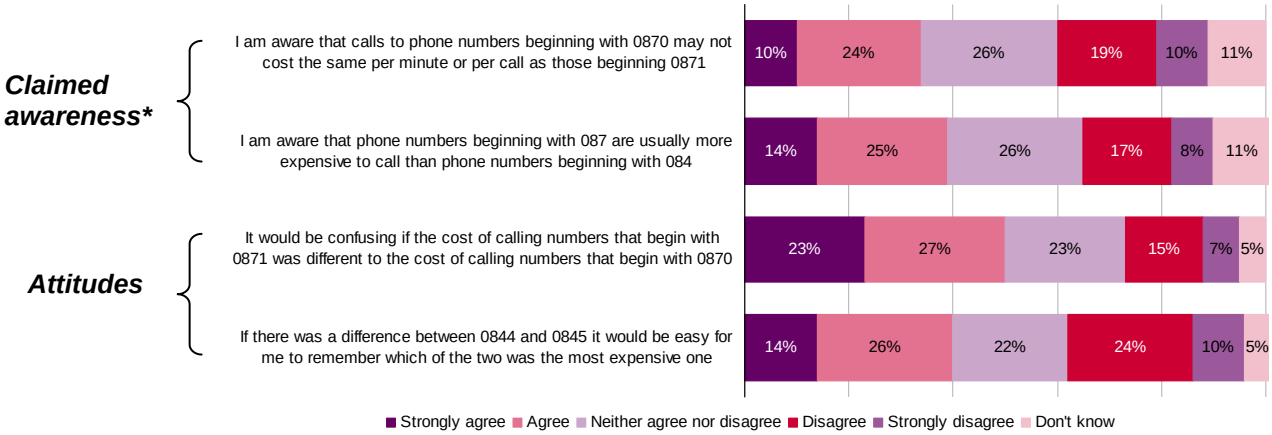
Base: UK adults, October 2005, n = 1067
* Source: Ofcom research conducted by ICM Research. Base: GB adults, July 2005 (Base: 1039)

Residential consumers' ability to make cost distinctions from phone number prefixes at three-digit level (e.g. 0844) for current NTS numbers

4.6 To better understand how easily consumers distinguish between having call cost information contained in the first 2 digits of a dialling code (after the zero) compared to the first 3 digits, respondents were asked if they agreed (or disagreed) with awareness and attitudinal statements relating to numbers beginning with 084x and 087x. The responses are shown in figure 4.3.

Figure 4.3 Proportions of residential consumers that agree with statements about differences between 084x and 087x numbers

Q. Please tell me whether you agree or disagree with the following statements…



Base: UK adults, October 2005, n = 1067
** Note that the purpose of this question was to provide an indication of differences in awareness of cost differences at 2-digit and 3-digit levels. It is the difference between the two "% agree" figures that is perhaps more interesting than the absolute figures – which may contain an over-claim, given that respondents may have felt that the statements imply that differences do exist.*

4.7 About a quarter (24%) claim that they are able to distinguish current NTS cost differences at three-digit level by agreeing with both 'claimed awareness' statements. By contrast, 15% said that they can only distinguish between differences at a two-digit level (i.e. they claimed they knew 087 was more expensive than 084, but were not aware that 0870 may not cost the same as 0871). Just over half (54%) say they are not able to distinguish between the cost of any of the different types of NTS numbers.[3]

4.8 Consumers appear to be less confident about their ability to distinguish costs by dialling codes than their claimed actual ability suggests they should be. As previously discussed, 24% say they are able to make cost distinctions at 3-digit level with today's NTS numbers, however a comparably smaller proportion (7%) agree with attitude statements indicating that these differences are easy to remember (by agreeing with the 0844/5 statement and disagreeing with the 0870/1 statement).

4.9 So, in summary, this analysis suggests that most consumers make a fairly subtle distinction in estimating the cost of calling 084 and 087 numbers, and when looking at differences according to the third number dialled after the zero – for example between 0844 and 0845 - they make even less of a distinction. This is consistent with the limited distinctions between chargeable 08 numbers suggested in Figure 4.1.

[3] 8% claimed that they were aware that there could be a difference in cost between 0870 and 0871 but not 084 and 087.

4.10 Some caution should be applied when drawing conclusions from these research findings as awareness of cost differences could have been influenced by a number of other factors, such as advertising, press coverage and word of mouth. Also, awareness of 0844 and 0871 is lower than 0845 and 0870 numbers, as illustrated in figure 4.2. Stated awareness of cost differences should not be solely attributed to the number of digits in the dialling code.

Section 5

Numbers and associated information

Introduction

5.1 In this section, residential and business consumers were asked to assess the value of information contained in a number.

5.2 Consumers were asked to rate their level of concern at the loss of:

- Geographic significance – the ability to determine the location of the caller by the area code and number
- Platform distinction – the ability to determine whether a call is from / to a mobile or fixed line

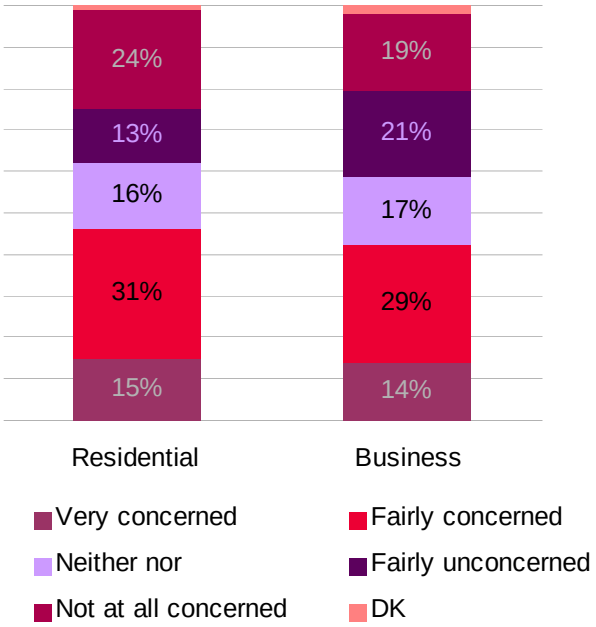
Geographic significance

5.3 There was a mixed response among businesses to the importance of identifying location. 43% of business consumers were concerned at the idea of numbers losing geographical significance, whereas 39% were not concerned. There was little variance between company sizes.

5.4 Similarly, among residential consumers, opinions were divided, with 46% concerned at the loss of geographic significance and 37% unconcerned.

Figure 5.1 Proportion of consumers that say they would be concerned or unconcerned at losing geographic significance of telephone numbers

Q. UK land line numbers currently have area codes that indicate the location of the telephone number. For example, phone numbers for lines in Aberdeen all begin with 01224 or numbers in Brighton begin with 01273. If phone numbers changed and you were no longer able to tell the location of the telephone number, how would you feel about that?



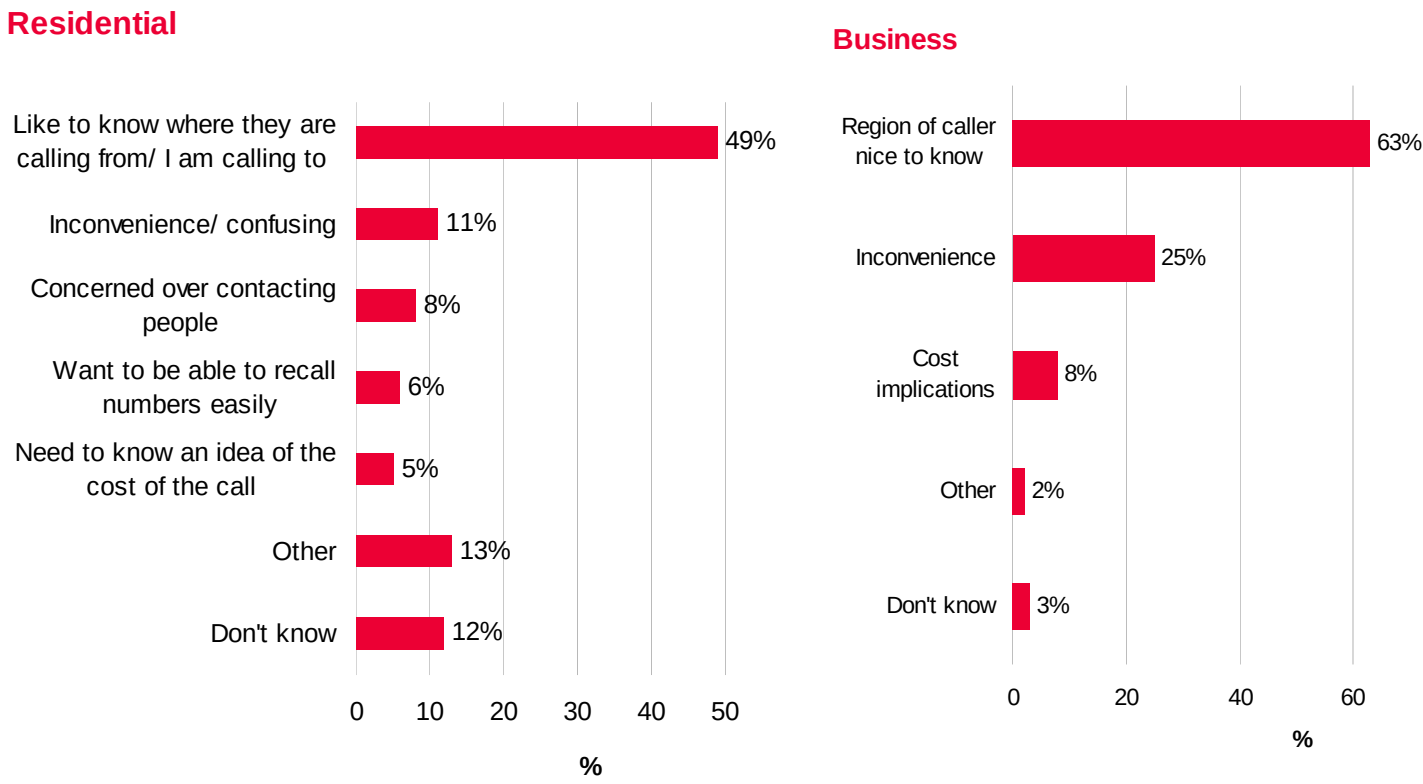
Base: UK residential consumers, n = 1035,, UK business consumers, n = 400

5.5 Residential and business consumers who said that they would be concerned about loss of geographic significance gave a number of emotional and practical reasons for this concern, in the qualitative and quantitative research.

"It's nice to know, it's always been like that" (*Adult 35+)*

"We use it to help us identify where the customer is." (SME)

Figure 5.2 Reasons given by consumers who said that they would be concerned about a loss of geographic significance



Base: UK residential consumers, n = 481, UK business consumers, n = 170

5.6 The findings were similar when, in other research, residential and business consumers were asked how important it was to be able to tell geographic location from telephone number prefixes. In those surveys, 52% of residential consumers and 50% of business consumers said that it is important. It was unimportant to 20% and 37% of residential and business consumers respectively. The remainder either didn't know or said that it was neither important nor unimportant.

5.7 Qualitative research amongst businesses found that for many it was important that their telephone number reflected their business location. For these companies, it was considered a useful device for demonstrating local presence and encouraging local trade.

5.8 This finding was confirmed by the quantitative survey, which demonstrated that significant proportions of businesses felt that it was important that their telephone number reflects their geographic location, and this is more so amongst smaller businesses.

Figure 5.3 Importance of telephone number reflecting the company location

Q. How important is it to your business that the company telephone number reflects the location in which the company is based?

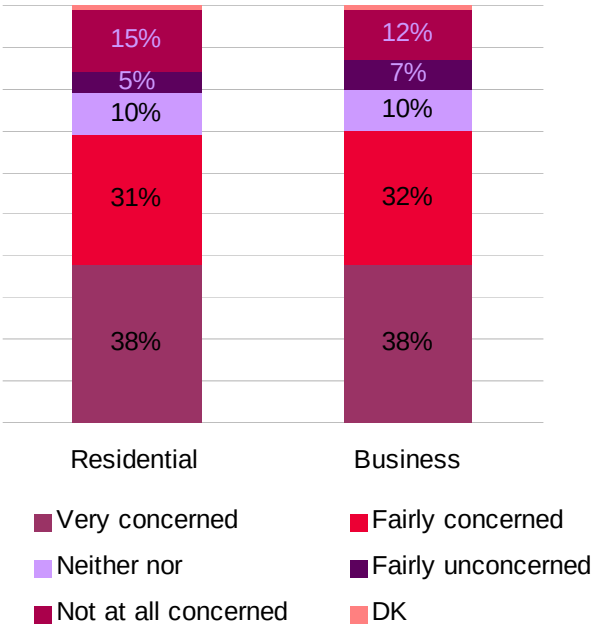
Base: UK businesses n=400

Platform Distinction

5.9 Business and residential consumers were much more concerned at losing the ability to distinguish between mobiles and fixed line calls. 70% of business consumers and 69% of residential consumers said they would be concerned, 38% of both business and residential consumers said they would be *very* concerned.

Figure 5.4 **Proportion of consumers that say they would be concerned or unconcerned at the prospect of the loss of ability to distinguish between mobile and fixed line numbers from telephone number prefixes**

Q. The current number system allows us to distinguish between mobile numbers and land line numbers - mobile numbers start with 07 and land line numbers start with 01 or 02. If phone numbers changed and your company was no longer able to distinguish between a land line and a mobile number, how would your company feel about that?

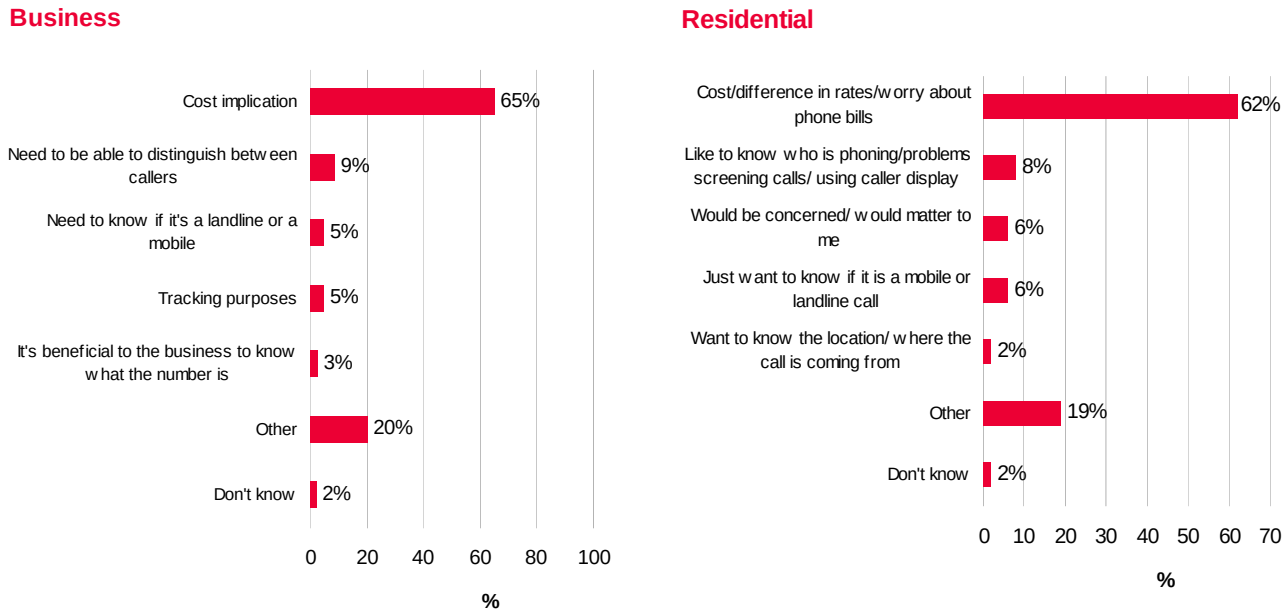


Base: UK residential consumers, n = 1103; UK business consumers, n = 400

5.10 The primary reason for consumer concern at the potential loss of the distinction between fixed and mobile phone numbers was related to identifying call costs. Business and residential consumers felt that this distinction was a key indicator of cost because of the perceived difference in the cost of calling fixed and mobile phones.

5.11 The qualitative research found that teenagers and young adults, especially, felt that this distinction was also important on a social level. To them, a mobile was considered personal, whereas the fixed line was communal and therefore required a different set of behaviours. For example teenagers said that when calling a friend on a fixed phone they would be prepared to be more polite in case their friend's parents answered the call.

Figure 5.5 **Reasons given by those concerned at the prospect of the loss of ability to distinguish between mobile and fixed line phones from telephone number prefixes**



Base: UK residential consumers that are concerned about loss of ability to distinguish platform, n =736; UK business consumers that are concerned about loss of ability to distinguish platform, n =280.

Section 6

Local dialling and consumer responses to possible options in the event of geographic areas running out of numbers

Introduction

6.1 Local dialling is the ability to make calls within the local dialling code area without having to dial the local area dialling code. For example, to dial Ofcom's London office switchboard on +44 (020) 7981 3000 from another fixed line phone number with an 020 prefix, the caller only need dial 7981 3000, omitting the area dialling code.

6.2 Some of the options available to resolve a potential shortage of telephone numbers in geographic areas could have some impact on the ability to dial locally – i.e. omit the area code when making local calls.

6.3 To help assess options available to deal with local geographic areas running out of telephone numbers, consumers were asked about the importance of local dialling and also about their reaction to different options to resolve this issue.

Local Dialling

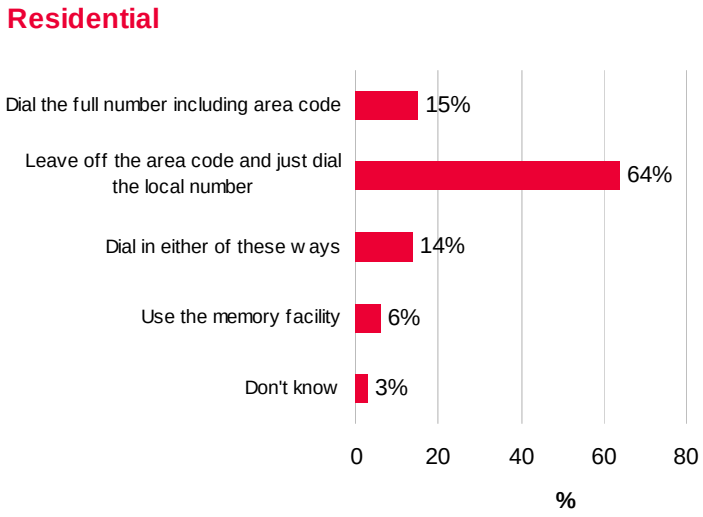
6.4 To assess the importance of Local Dialling, respondents were asked about

- Their dialling method from a fixed line to another local fixed line phone (Residential consumers only)
- The proportion of calls made from fixed line phones by just dialling the local number (Residential consumer only)
- The importance of leaving off the area dialling code when making local calls from a fixed line

6.5 The majority of residential users say they make use of local dialling. 64% claim that they mostly leave off the area code and just dial the number, with an additional 14% who mostly either dial in full or leave off the code.

Figure 6.1 Residential consumers' claimed use of local dialling

Q. Thinking about the calls you make from a fixed line phone to another local fixed line phone, do you mostly….?



Base: UK residential consumers that use a fixed line phone n = 932

6.6 61% of residential consumers and 60% of business consumers did not think the ability to 'local dial' is important.

6.7 Large businesses, with 250+ employees were least likely to say that the ability to local dial is important to them (26%). The qualitative research revealed that this appears to be due to frequent use of pre-programming numbers and the amount of numbers dialled that are not local.

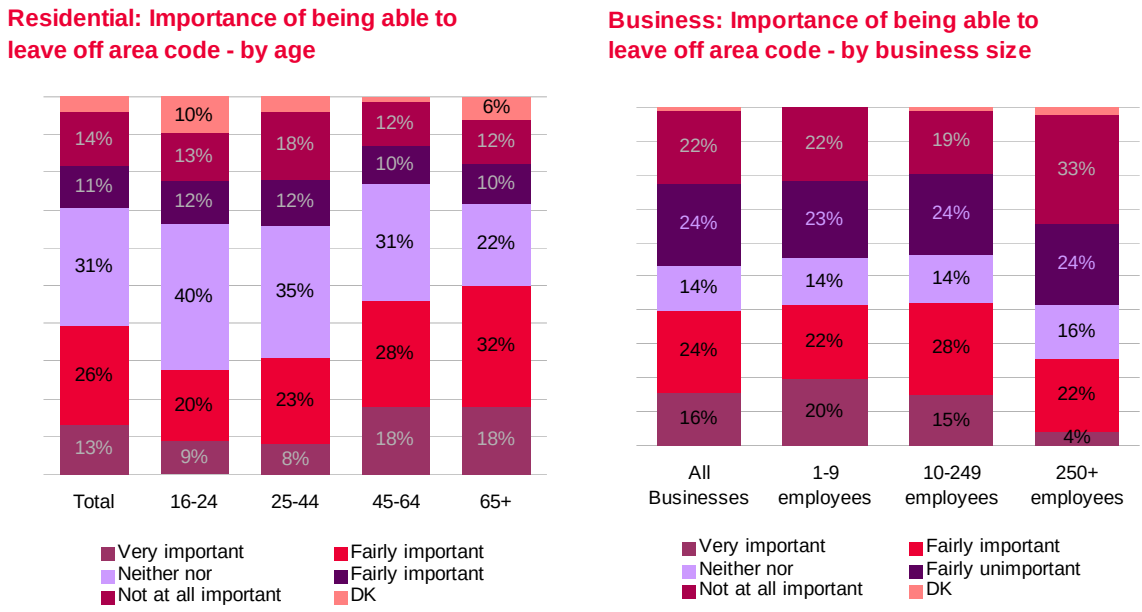
6.8 Local dialling appears to be most important to older residential consumers (50% of those aged 65+ say it is important) and, to a lesser degree, by businesses with 1-9 employees (41%).

6.9 Overall, the qualitative and quantitative research indicates that the local dialling facility appears to be taken for granted rather than highly valued, although it was not without some benefits

- Numbers were felt to be easy to remember
- There was less opportunity for mistakes
- No code for many meant 'localness' and many, particularly in urban environments, would just give out a six digit number with no area code

Figure 6.2 Residential consumers' claimed use of local dialling

Q. How important is to you that you are able to leave off the area dialling code when you dial from a fixed line phone to another local fixed line phone?



Base: UK residential consumers n = 1133, UK businesses n = 400

Consumer responses to options to resolve geographic area number shortage

6.10 Respondents were asked to comment on three options (see Appendix 2 for full explanations).

- **Option A – Wide Area Code**
- **Option B – Close Local Dialling**
- **Option C – Introducing Overlay Codes**

6.11 In the quantitative research, all respondents were shown cards providing an explanation of each of the three options.

- Business respondents were faxed or emailed the explanations in advance of the interview.
- Residential respondents were shown cards during the interview.

6.12 The order in which the options were presented was rotated to account for any order effect.

6.13 Respondents were asked two questions for each option.

- The first was a rating question: "Using a scale of 0-10 where 0 means this option would not bother you at all and 10 would bother you very much, please give me your impression of Option X".

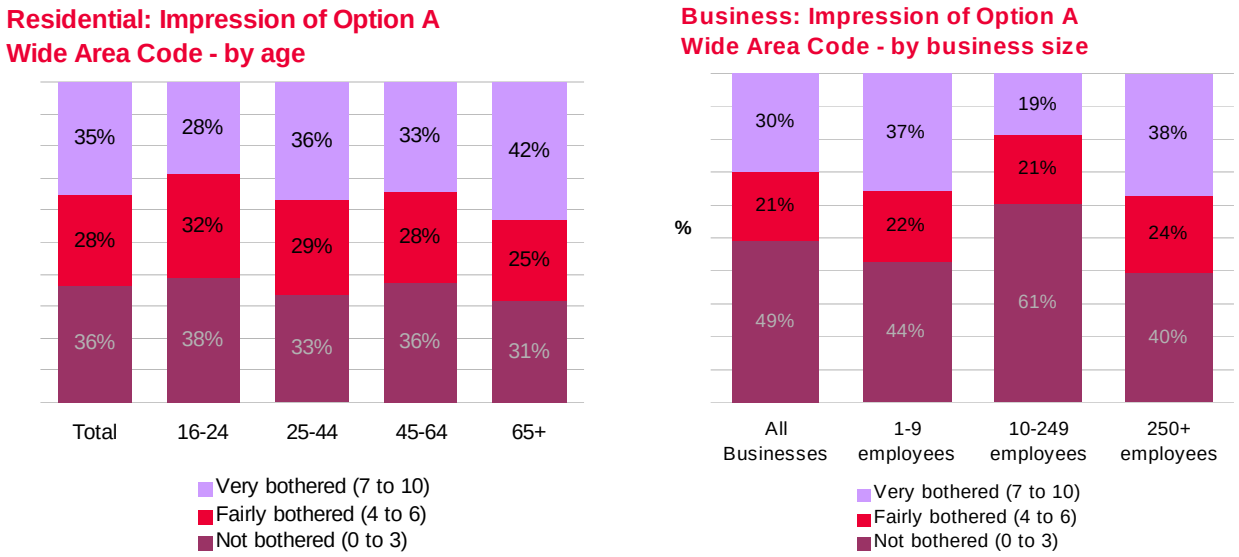
- The second was an open ended question that asked for the reasons for their score.[4]

6.14 Option A: Wide Area Code:

- Businesses appeared to be marginally less concerned about this option than residential users – but neither audience came out strongly either in favour or against.
- Reasons given for not liking this option in the qualitative and quantitative research show that residential consumers, older adults in particular, have concerns about change in general and the possibility of more numbers, whereas businesses were concerned with number changes and associated costs.

Figure 6.3 Consumer reactions to Wide Area Code option

Q. Using a scale of 0-10, where 0 means this option would not bother you at all and 10 means it would bother you very much, please give me your impression of OPTION A on a scale of 0-10?



Base: GB residential consumers n = 1133, UK businesses, n = 400

- Residential users in Northern Ireland were asked to rate their satisfaction with their current telephone numbering scheme (having undergone a change to a wide area code in the year 2000), on a scale from 0-10, where 0 was not at all satisfied, and 10 was very satisfied.
- Responses were very positive with 98% scoring 5 or more, and 75% scoring 7 or more.

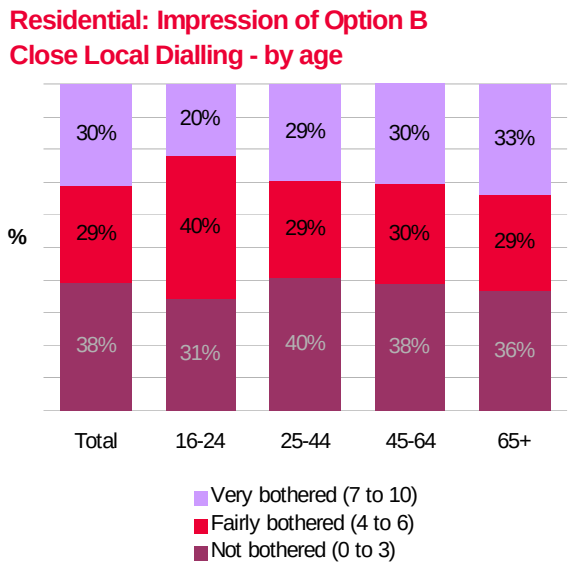
[4] It should be noted that businesses assessed Option C alongside Option A and B as part of the main telephone survey. Residential users, however, assessed Option C as part of a generic UK omnibus survey and in isolation of telephone related subjects. Residential users in Northern Ireland were exempt from assessing the three options because a wide area code had been implemented there in 2001. Instead, residential users were asked to rate their satisfaction with their current numbering framework. Business users in Northern Ireland rated the options like all other UK businesses surveyed.

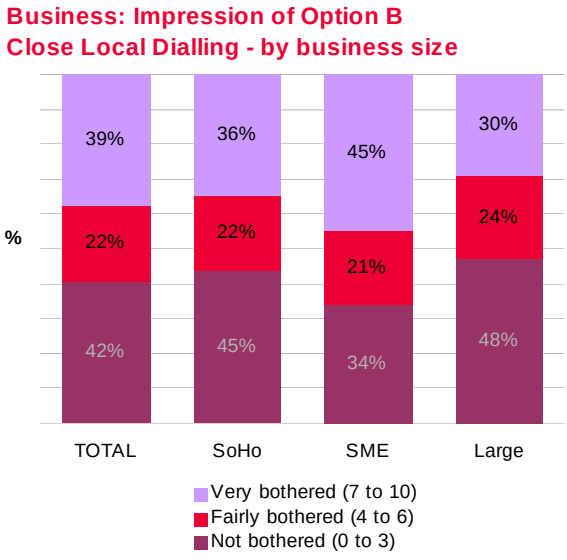
6.15 Option B: Close Local Dialling:

- On average, residential users were less concerned about this option than businesses, though apart from businesses with 10-249 employees, neither group was strongly for or against.
- Business and residential users had different priorities. The main concern of businesses, those with 10-249 employees in particular, was over the loss of geographical identity and the associated potential confusion over location, whereas residential users' first concern was about having to dial more numbers.
- Both audiences mentioned being in favour of keeping the same number and there were also mentions that this option would not cause too much upset.

Figure 6.4 Consumer reactions to Close Local Dialling option

Q Using a scale of 0-10, where 0 means this option would not bother you at all and 10 means it would bother you very much, please give me your impression of OPTION B on a scale of 0-10?





Base: GB residential consumers n = 1133, UK businesses, n = 400

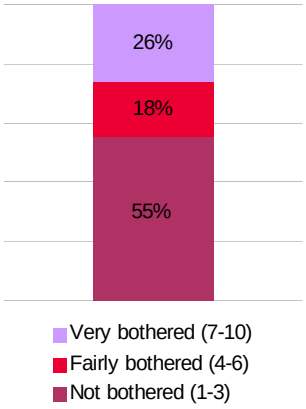
6.16 Option C: Overlay:

- The quantitative research found that businesses were more concerned about this option than residential users but the ratings given by both groups show a greater level of acceptance than was initially shown in the focus groups – where the option was largely rejected for being too complicated.
- Both residential and business consumers mentioned that this option could however cause confusion, with businesses in particular noting that this would lead to two codes in one location.

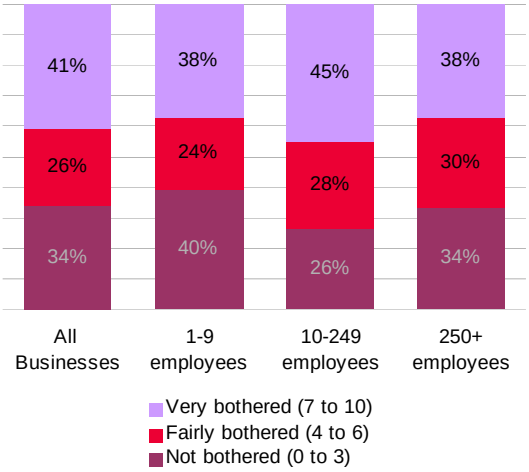
Figure 6.5 Consumer reactions to Overlay code option

Q. Using a scale of 0-10, where 0 means this option would not bother you at all and 10 means it would bother you very much, please give me your impression of OPTION C on a scale of 0-10?

Residential Omnibus: Impression of Option C - overlay new codeswhen existing codes run out



Business: Impression of Option C - Overlay new codes when existing codes run out



Base: UK residential consumers = 999, UK businesses, n = 400

Section 7

Attitudes towards numbering changes and measuring the cost of numbering changes

Introduction

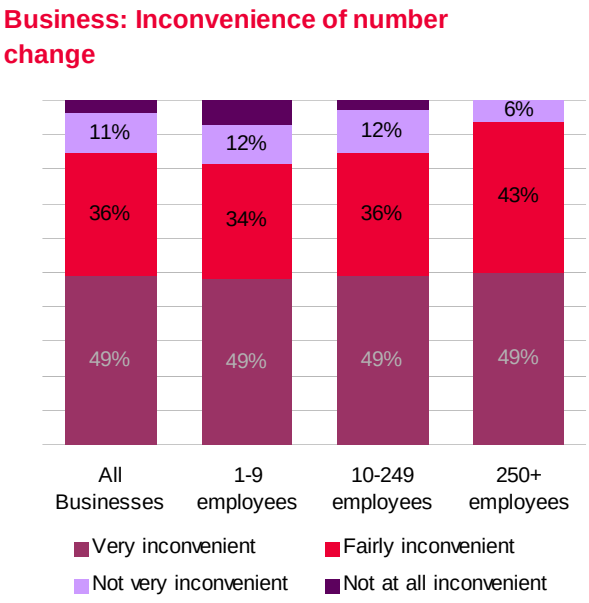
7.1 The qualitative research found that numbering changes were considered inconvenient and costly by to residential and business consumers. For business consumers a number change was seen as having a significant financial impact on them.

Business consumers' view on number change

7.2 The majority (85%) of businesses agreed that a number change was inconvenient – more so amongst larger businesses.

Figure 7.1 Inconvenience to businesses of a number change

Q Overall, how inconvenient would a number change be to your business?



Base: UK businesses n = 400.

7.3 The qualitative and quantitative research found a number of issues related to a number change that would cause costs to businesses. These findings were used to design a survey which aimed to estimate the cost to businesses of a number code change. Companies were surveyed in areas that experienced a number code change in the year 2000.

7.4 Figure 7.2 shows a breakdown of the results from this survey. The mean estimated cost of a number code change was just over £5,000 per business. Updating stationery and loss of business were the highest estimated costs

Figure 7.2 Estimated cost to businesses of a number code change

		Company Size			Location		Target Market		Turnover	
	All businesses	1-9 emps	10-249 emps	250+ emps	London	Cardiff, Coventry, N Ireland, Southampton, Portsmouth	Locally only	Regionally/ Nationally	Up to £1m	Above £1m
Base size:	*n = 406*	*n=190*	*n=183*	*n=33*	*n=59*	*n=347*	*n=167*	*n=197*	*n=133*	*n=79*
Stationery	£1,785	£432	£2,244	£9,821	£4,123	£1,400	£405	£3,299	£506	£5,129
Signs	£505	£227	£546	£2,154	£276	£543	£137	£940	£177	£1,904
Marketing materials	£840	£180	£857	£6,590	£1,620	£705	£173	£1,641	£258	£2,989
Management staff costs (days)	£421 (3.2)	£422 (3.2)	£317 (2.4)	£846 (6.4)	£499 (3.8)	£412 (3.1)	£250 (1.9)	£562 (4.2)	£292 (2.2)	£617 (4.6)
Admin staff costs (days)	£175 (2.3)	£112 (1.5)	£165 (2.2)	£731 (9.7)	£155 (2.1)	£171 (2.3)	£75 (1.0)	£276 (3.7)	£101 (1.3)	£434 (5.8)
Lost business estimate	£1,209	£248	£1,981	£2,455	£1,524	£1,155	£576	£2,002	£603	£4,715
Other costs *	£402	£95	£796	£2	£1,478	£223	£81	£761	£116	£856
TOTAL COST excl. staff costs (£s)	£4,741	£1,182	£6,424	£21,022	£9,021	£4,026	£1,372	£8,643	£1,660	£15,593
TOTAL COST (£s) incl. staff costs	£5,337	£1,715	£6,907	£22,598	£9,675	£4,610	£1,697	£9,481	£2,053	£16,644

* e.g. yellow pages ad change, website change, inconvenience, etc

Notes on Results

- It is important to note that respondents were asked to recall figures from 5 years ago and so the results should be treated as rough estimates and at prices in year 2000.

- The mean figures were calculated from actual answers given. There was no capping of upper limits, no mid point estimations and 'Don't Know' answers were not counted.

- Management time was valued at £133 per day, administration was valued at £75 per day. These rates were calculated using the UK average for administrative (£18k) and middle management (£32k) full time salaries, with 21 days holiday per year. (Source: Office Angels Salary Survey).

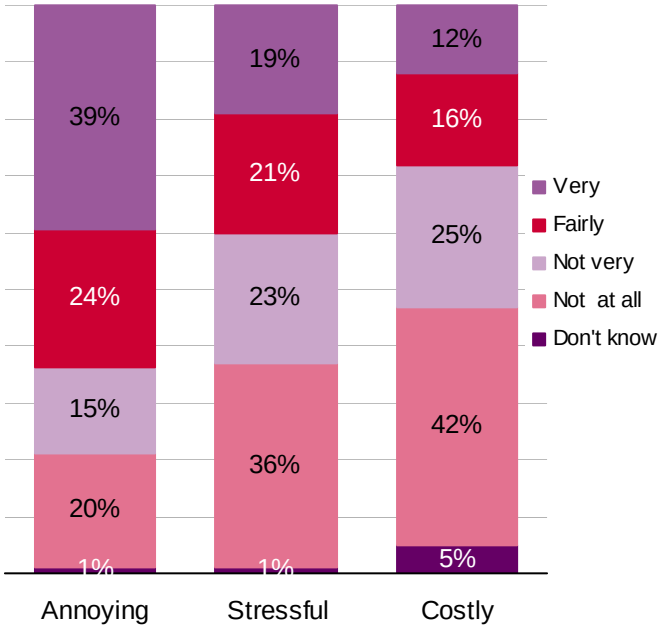
Residential consumers' views on number change

7.5 A change in a local dialling code can have costs to consumers that are difficult to quantify due to their 'intangible' nature. To help assess how important these 'intangible' costs of number change are compared to the financial costs, residential consumers were asked about how annoying, stressful and costly a local area dialling code change would be.

7.6 As the chart below demonstrates, greater proportions of residential consumers said that 'intangible' costs, such as annoyance or stress, would affect them if their local code changed than the proportion who say that a code change would be costly; suggesting that the 'intangible' costs of a number change are greater than the financial costs they incur – which is consistent with findings from qualitative research.

Figure 7.3 Impact on residential consumers of a change in local area dialling code

Q. If your local dialling code changed –which meant that the first few digits of your home telephone number would have to change, how annoying/stressful/costly would you find this?

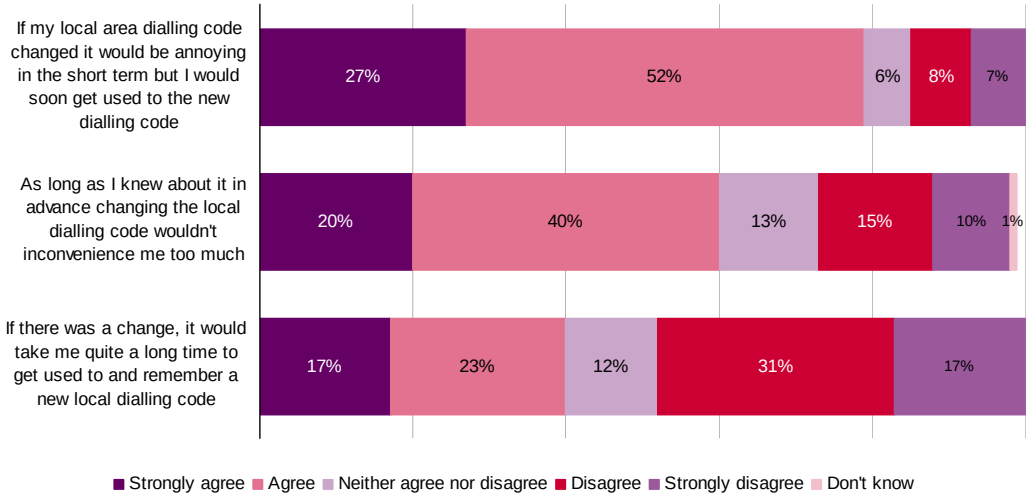


Base: UK adults, October 2005 (Base: 1067)

7.7 The qualitative research conducted by Ofcom suggested that number changes can be annoying and inconvenient for consumers, but for the majority, if the changes are well communicated, a number change is something that can be dealt with relatively easily. This is consistent with the proportions who agree with different attitude statements shown in figure 7.4. The majority (79%) of UK adults agreed that a number change would cause short term annoyance, but it would be something that they would soon get used to.

Figure 7.4 Attitudes towards number change

Q. Can you tell me whether you agree or disagree with the following statements…



Base: UK adults, October 2005 (Base: 1067)

7.8 On average, residential consumer say that they would be willing to pay £6 to avoid their own telephone number changing, and think that £5 would be a reasonable amount for everyone to have to pay to avoid a local area code change. Younger adults and ABC1 social groups say they are willing to pay slightly more.

7.9 61% and 54% respectively would not be willing to pay more than £1 to avoid a number change or think that £1 or less would be a reasonable amount for everyone to pay to avoid a number change.

7.10 A quarter (26%) say they would be willing to pay more than £5 to avoid their telephone number changing and a similar proportion (24%) think it would be reasonable for everyone to pay £5 or more to avoid an area code change.

Figure 7.5 Residential consumers' stated willingness to pay to avoid number change

Q. If your landline telephone supplier told you that your existing telephone number would have to change unless you paid a one off fee to keep it, what would be the maximum amount you would be willing to pay to keep your existing telephone number?

Q. And if it was possible that your local area's dialling code would have to change unless everybody with a phone in your area paid a one-off fee to avoid it being changed, how much do you think would be a reasonable amount for everyone to pay?

	Amount willing to pay as a one-off fee to avoid existing telephone number changing	Amount think it is reasonable for everyone in local area to pay to avoid area code change
Nothing	55%	43%
1p-£1	6%	11%
£1.01 - £5	11%	19%
£5.01 - £10	13%	11%
£10.01 - £20	5%	3%
£20.01 - £30	2%	2%
£30.01 - £40	1%	-
£40.01 - £50	3%	1%
£50.01 - £200	1%	3%
£200.01 +	1%	4%
Don't know	3%	5%
Mean, rounded to nearest £ and capped at £100	£6	£5

Base: UK adults, October 2005 (Base: 1067)

7.11 Those that said that a code change would be stressful said they would be willing to pay £7 on average to avoid a number change, compared to £6 stated by those that say it would not be stressful. Annoyance appeared to have no impact.

7.12 However, when consumers are asked how much they would accept from their telephone provider as a one-off payment in return for agreeing to change their telephone number a much higher average 'value' (£600) is placed upon continuity of telephone number; as shown in figure A7.6. Four in ten (38%) said that £1,000 would not be enough in return for agreement to change their phone number.

7.13 This apparent discrepancy indicates that the value of continuity of a telephone number is greater than the willingness to pay for continuity of a telephone number. This is consistent with findings from the qualitative research, which suggest that a number change can cause some significant inconvenience for residential consumers. The apparent low willingness to pay for continuity might be explained by consumers being unwilling to pay to keep something they feel is 'theirs' anyway.

Figure 7.6 Amount residential consumers would accept from their telephone supplier as a one-off payment in return for agreeing to allow them to change telephone number

Q. If your landline telephone supplier offered you a one-off payment in return for agreeing to allow them to change your phone number, how much would you have to be offered to allow them to change it? (Prompted at different price points)

Minimum amount willing to accept	
50p	3%
£1	1%
£5	1%
£10	1%
£20	2%
£50	6%
£100	14%
£250	10%
£500	11%
£1000	12%
Wouldn't accept £1000	38%
Mean, based on mid-points. Those that wouldn't accept £1000 are conservatively given a value of £1001	£600

Base: UK adults, November 2005 (Base: 1013)

7.14 On average, females and older consumers were more likely to say they would require a higher amount to persuade them to give up their phone. There are also some differences according to socio-economic group, with C2DE consumers more likely to accept amounts up to and including £50, but also being less likely than ABC1 groups to accept £1000.

Section 8

Interest in permanent and cross platform telephone numbers

Introduction

8.1 In order to understand potential consumer attitudes to numbering in a converged communications environment, residential and businesses consumers were asked about their interest in having their own single permanent numbers and of having a telephone number that can be directed to any handset.

Level of interest in the idea of a single number for fixed and mobile phones

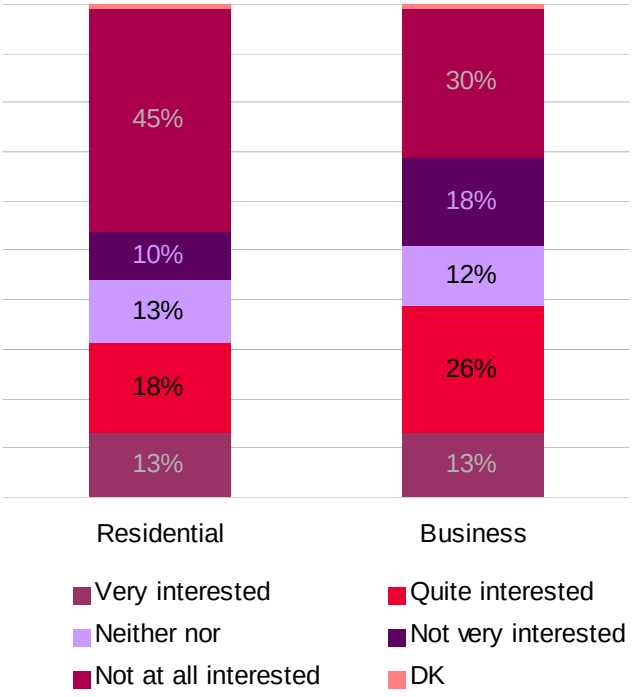
8.2 Business consumers were more interested in the idea of a single permanent number than residential consumers.

8.3 A few smaller businesses mentioned that a single number could possibly remove the need for a fixed line, if it was not possible to tell the platform from this single number.

8.4 Residential consumers however were more mixed in their response. Although there was higher interest from the younger age groups , 55% of all residential consumers were not interested in the proposition.

Figure 8.1 Interest in having a single number for fixed and mobile phone

Q. Many people now have two telephones - a mobile and a fixed line. It is possible that you could have one telephone number for both your mobile and fixed lines and you could decide whether your mobile or your land line or both rang when the number was called. How interested are you in this idea?
Q. Many companies use a combination of mobiles and a land lines. It is possible that your company could have one telephone number for both your mobile and fixed lines and you could decide whether your mobile or your land line or both rang when the number was called. How interested is your company in this idea?

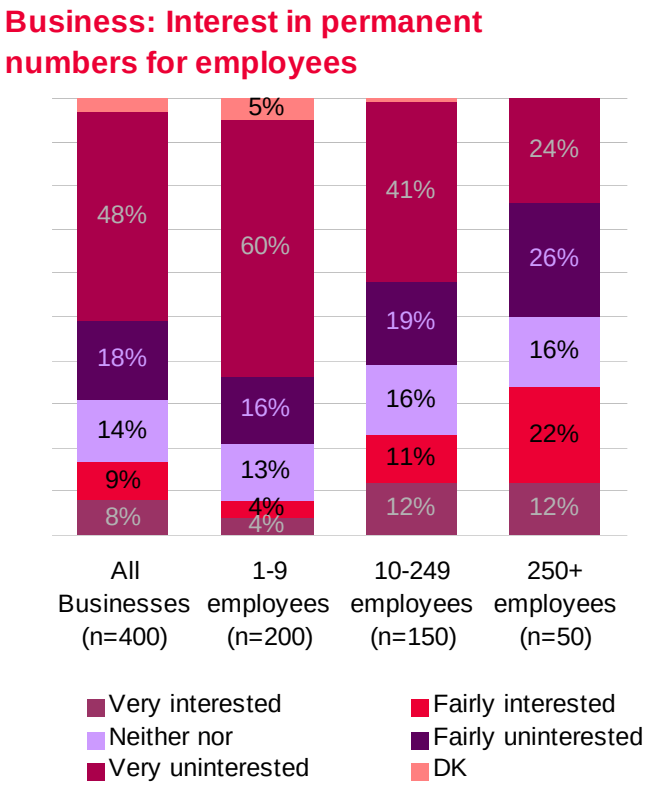


Level of interest in the idea of permanent numbers for employees

8.5 Businesses with fewer employees were generally uninterested in the idea of permanent numbers for employees (76% claimed to be uninterested). Whilst 34% of the larger companies showed some interest, half said they had no interest.

Figure 8.2 Interest in having a permanent number for employees

Q. Instead of a single permanent number for the business, how interested would your company be in having individual permanent numbers for each of your employees?



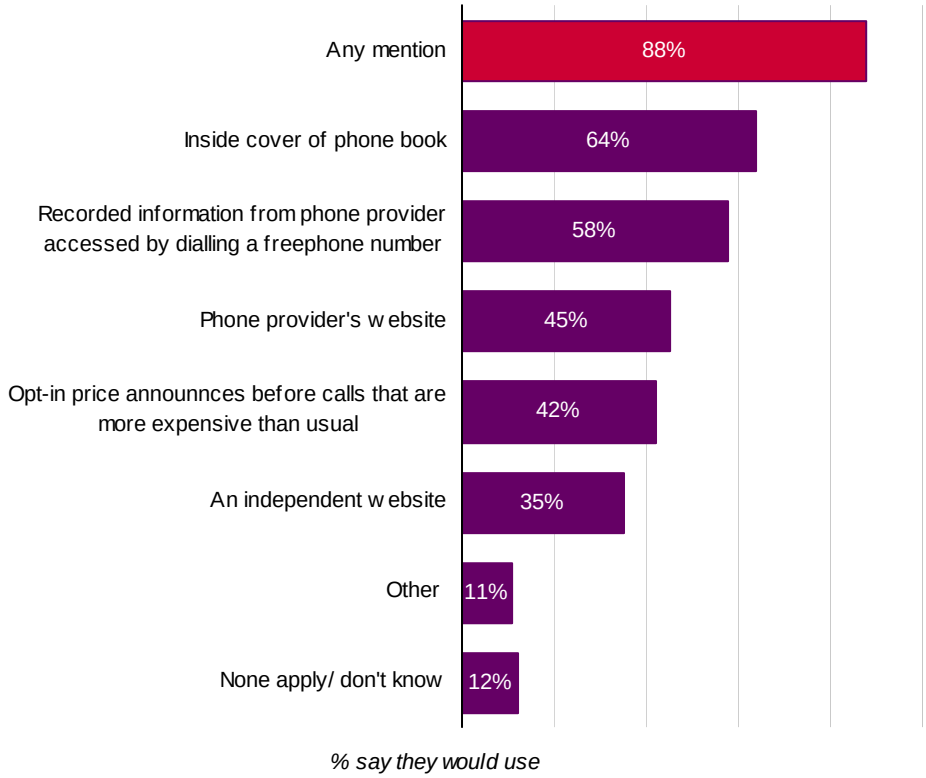
Section 9

Potential sources of information about the numbering plan

9.1 The large majority (88%) of residential consumers say they would use information sources about the cost of different call types. The most popular (prompted) source of information was the inside cover of a phone book. Caution should be applied to these findings as stated intentions in survey research do not necessarily lead to actual actions.

Figure 9.1 Proportions of residential consumers that say they would use information sources about the call costs if they were available (prompted)

Q. If they were available, which if any of these information sources would you realistically use to find out about the costs of calls to different numbers…



Base: UK adults, October 2005 (Base: 1067)

9.2 Proportions claiming they would use information about the cost of calling different number types was highest amongst ABC1 social groups.

Section 10

Annexes

Questionnaires

Quantitative research into views on local dialling and geographic numbering

GB residential consumer face to face interviews

Q1. When making telephone calls do you use….

A fixed line only?
A mobile only?
Both fixed line and mobile?

Q2. Roughly, what proportion of your telephone calls do you make from a fixed line?

Q3. On your fixed line telephone do you use the memory facility that allows you to store telephone numbers so that you do not have to dial the number yourself?

Q4. Roughly, what proportion of your fixed line calls is made using the memory facility?

Q5. Roughly, what percentage of your fixed line calls is made to local numbers, compared with national, international and mobile numbers?

Q6. Thinking about the calls you make from a fixed line phone to another local fixed line phone, do you mostly…

Dial the full number including area code, e.g. (0121) 123 456
Leave off the area code and just dial the local number, e.g. 123 456
Dial in either of these ways
Use the memory facility

Q7. Roughly what proportion of all of the local calls you dial from your fixed line phone are made by leaving off the area dialling code and just dialling the local number?

Q8. How important is it to you that you that you are able to leave off the area dialling code when you dial from a fixed line phone to another local fixed line phone?

Q9. UK telephone numbers currently have area codes that indicate the location of the telephone number. For example, phone numbers for lines in Aberdeen all begin with 01224. How important is it to you to be able to tell from the telephone number whereabouts you are phoning?

At this point, respondents were asked to read about the options shown in Appendix 2

Q10a. Using a scale of 0-10, where 0 means this option would not bother you at all and 10 means it would bother you very much, please give me your impression of OPTION A on a scale of 0 to 10.

Q10b. In a few words, please tell me the reasons for your score.

Q11a. Using a scale of 0-10 where 0 means this option would not bother you at all and 10 means it would bother you very much, please give me your impression of OPTION B on a scale of 0 to 10.

Q11b. In a few words, please tell me the reasons for your score.

Q12. From time to time, for different reasons, telephone numbers have to change. You may remember that a few years back London numbers changed from beginning with 0171 and 0181 to 020 7 and 020 8. It might be possible that some telephone number changes could be avoided if everyone paid a small amount extra on their phone bill.

Would you be willing to pay an extra £x per year on your phone bill if it meant that telephone numbers didn't have to change?

Respondents were prompted to acceptable price from random starting point of either £1, £5, £10 or £20.

Q13. Do you use the memory feature on your mobile handset that allows you to call people by selecting their name from the phone handset menu without dialling their number?

Q14. Roughly, what proportion of all the calls you make from your mobile phone is made using the memory facility?

Q15. Now, thinking about the telephone numbers that you have stored in your mobile phone handset (or on your SIM card), which of these ways have you used to enter the telephone numbers into your telephone handset?

Typing in the number on the telephone keypad
Saving the number after being called by a new number
Saving the number after having it sent to me by text message
Saving the number after giving it sent to me by infra-red or blue-tooth
Other
I don't know – somebody else stored the numbers for me
Don't know/ can't remember
None of these

These questions were asked on a separate survey.

Q16a. Using a scale of 1-10 where 1 means this option would not bother you at all and 10 means it would bother you very much, please give me your impression of this option.

Q16b. In a few words, please tell me the reasons for your score.

Northern Ireland residential consumer telephone interviews

Q1 – Q9. As per GB face to face interviews (above)

I am now going to ask you to comment on the current telephone numbering system in Northern Ireland. Today's system includes an area code '028' and an 8-digit local number, the first two digits of which signify the local district e.g. '90' for Belfast.

Q10a. Using a scale of 0-10, where 0 means you are not at all satisfied and 10 means you are very satisfied, please give me your impression of your current numbering system on a scale of 0 to 10.

Q10b. In a few words, please tell me the reasons for your score?

Q11-Q14. As per GB face to face interviews, questions 12-15

UK business consumer telephone interviews

Interviews conducted with the person responsible for making decisions about your business telecom and IT needs

Q1. When making business telephone calls do employees use

Fixed line(s) only
Mobile(s) only
Both fixed line(s) and mobile(s)

Q2. Roughly, what proportion of telephone calls do employees make from a fixed line?

Q3. On your company's fixed line telephone(s) do employees use the memory facility / speed dialling that allows storage of telephone numbers so the number does not have to be dialled manually?

Q4. Roughly, what proportion of your company's fixed line calls is made using the memory facility?

Q5. Roughly, what percentage of your company's fixed line calls is made to local numbers, compared with national, international and mobile numbers?

Q6. How important to your company is the ability to leave off the area dialling code when calls are made from a fixed line phone to another local fixed line phone?

Q7. UK telephone numbers currently have area codes that indicate the location of the telephone number. For example, phone numbers for lines in Aberdeen all begin with 01224. How important is it to your company to tell from the telephone number whereabouts the call is made?

Q8. On your company's fixed line telephone(s) do employees use the memory facility/ speed dialling that allows storage of telephone numbers so the number does not have to be dialled manually?

Q9. Roughly, what proportion of your company's fixed line calls is made using the memory facility?

Q10. Roughly, what percentage of your company's fixed line calls is made to local numbers, compared with national, international and mobile numbers?

Q11. How important to your company is the ability to leave off the area dialling code when calls are made from a fixed line phone to another local fixed line phone?

Q12. UK telephone numbers currently have area codes that indicate the location of the telephone number. For example, phone numbers for lines in Aberdeen all begin with 01224. How important is it to your company to tell from the telephone number whereabouts the call is made?

Q13. How important is it to your business that the company telephone number reflects the location in which the company is based?

At this point, respondents were asked to read about the options shown in Appendix 2

Q14a. Using a scale of 0-10, where 0 means this option would not bother you at all and 10 means it would bother you very much, please give me your impression of OPTION A on a scale of 0 to 10.

Q14b. In a few words, please tell me the reasons for your score?

Q15a. Using the same scale please give me your impression of OPTION B on a scale of 0 to 10.

Q15b. In a few words, please tell me the reasons for your score.

Q16. Approximately how often does your business update their stationery, by this I mean letterhead, comp slips, business cards, envelopes, paper marketing materials and any other stationery that feature the business telephone number?

Q17. And approximately how often does your business update other marketing materials featuring the business phone number such as signs, window paintings, van displays?
Q18. Overall, how inconvenient would a number change be to your business?

Q19. In a few words, please tell me why it would be inconvenient?

Q20. If there were a change to the current numbering system, which meant that some fixed line numbers that your business called regularly changed, what would be the technical implications for re-programming your business telephone system? Please choose one of the following four options…

It will be very disruptive
It will be disruptive but manageable
It will not be disruptive
We don't have a programmable telephone system
Don't know

Q21. From time to time, for different reasons, telephone numbers have to change. You may remember that a few years back London numbers changed from beginning with 0171 and 0181 to 020 7 and 020 8. It might be possible that some telephone number changes could be avoided if everyone paid a small amount extra on their phone bill.

Would your company be willing to pay an extra £x per year on your phone bill if it meant that telephone numbers didn't have to change?

Respondents were prompted to acceptable price from random starting point of either £1, £5, £10 or £20.

Quantitative research into understanding of and attitudes towards current telephone numbering plan

GB residential consumer telephone omnibus interviews

Q1. When making telephone calls do you use…

A land line only
A mobile only
Both land line and mobile

Q2. When dialling from your land line, roughly what proportion of calls are made by recalling the number using **your own memory**, as opposed to other means such as the land line telephone's memory, an address book, or your mobile's memory?

Q3. When dialling from your mobile, roughly what proportion of calls are made by recalling the number using your own memory, compared with using other means such as the mobile's memory etc?

Q4. UK land line numbers currently have area codes that indicate the location of the telephone number. For example, phone numbers for lines in Aberdeen all begin with 01224 or numbers in Brighton begin with 01273. If phone numbers changed and you were no longer able to tell the location of the telephone number, how would you feel about that?

Q5. In a few words, please tell me the reasons.

Q6. The current number system allows us to distinguish between mobile numbers and land line numbers – mobile numbers start with 07 and land line numbers start with 01 or 02. If phone numbers changes and you were no longer able to tell if the number you were calling was a land line or a mobile, how would you feel about that?

Q7. In a few words, please tell me the reasons for your score.

Q8. Thinking about your landline telephone bill in relation to all the other household costs, do you think the amount you are currently paying for you bill is…

Expensive
Quite expensive
Neither expensive nor inexpensive
Quite inexpensive
Inexpensive

Q9. When making calls from your land line to other land lines, which of these statements best describes your attitudes to costs?

I am very aware of cost and try to spend as little time on the phone as possible
I try to spend less time on national calls than local calls because I know national calls are more expensive
I am signed up to a package and so it doesn't matter how long I spend on the phone so long as I make the calls at the right time or to the right numbers
I speak for as long as I like and don't pay attention to the cost

Q10. Different numbers have different costs associated with them. For example, the cost of a local call from a land line will be cheaper than calling a mobile number or a number that begins with 090. If it were possible to notify the caller of the cost of a call before being connected, how interested would you be in this service?

Q11. There could be different ways to be notified about the cost of a call – either you could listen to an announcement or the call charge could be flashed up on a handset display. It you were notified by an announcement, when would you like to be notified of the cost of the call?

Respondents were prompted to the following answer codes

On every call
When calls cost 5p/10p/20p/50p/£1.00/£1.50 per minute or more
I don't want to be notified on any calls

Q12. Alternatively, if you were to be notified on your handset display, when would you like to be notified of the cost of the call?

Q13. It is possible to take your land line number with you if you move house to a new location. How important is it to be able to move house and take the land line telephone number with you?

Q14. It is possible that you could take your telephone number anywhere in the UK, i.e. to a location with a different area code. This would mean that area codes would become mixed up and it would not be possible to tell location from the number. Which would you prefer?

To be able to move anywhere with your number and possibly lose the ability to identify location
To move your number only in the local area and maintain the ability to identify location.

Q15. Many people now have two telephones – a mobile and a fixed line. It is possible that you could have one telephone number for both your mobile and fixed lines and you could decide whether your mobile or your landline or both rang when the number was dialled. How interested are you in this idea?

Q16. In a few words please tell me the reasons for your answer.

Q17. Currently numbers are allocated to you by telephone operators (BT, Vodafone, Orange, Cable & Wireless, etc). However, it may be possible that you could choose your own number and this number could be permanently yours whether you moved house or changed operators. How interested are you in this idea?

Q18. In a few words, please tell me the reasons for your answer.

Q19. How much would you be prepared to pay to permanently keep and own your telephone number?

2nd GB residential consumer telephone omnibus interviews

Q1. If you saw a phone number on an advert for something that you were interested in, how likely or unlikely would you be to call the number if it was…

A normal household telephone number
A mobile telephone number
A number that begins with 0800
A number that begins with 0844
A number that begins with 0845
A number that begins with 0870
A number that begins with 0871
A number that begins with 09

Q2. How much do you think it costs to call the following types of telephone numbers from your landline phone at home during the daytime on a weekday?

Options as shown in Q1.

Q.3. If they were available, which if any of these information sources would you realistically use to find out about the costs of calls to different numbers?

Your phone provider's website
An independent website
The inside cover of The Phone Book
Recorded information from your phone provider available by dialling a freephone number on your telephone
Automated price announcements that you can choose to receive before your call is connected to numbers that are more expensive than normal

Q4a. Please tell me whether you agree or disagree with the following statements:

If there was a difference in the cost of calling numbers that begin with 0844 and 0845 it would be easy for me to remember which of the two numbers was the most expensive one

It would be confusing if the cost of calling numbers that begin with 0871 was different to the cost of calling numbers that begin with 0870

Q4b. And now please tell me whether you agree or disagree with these two statements

I am aware that phone numbers beginning with 087 are usually more expensive to call than phone numbers beginning with 084

I am aware that calls to phone numbers beginning with 0870 may not cost the same per minute or per call as those beginning with 0871.

Q5. If your local are dialling code changed – which meant that the first few digits of your home telephone number would have to change…

How annoying would you find this?
How stressful would you find this?
How costly would you find this?

Q6. Normal household landline numbers begin with an area code that can tell callers the location they are calling, for example your own number begins with [respondent's own dialling code was read out]

Can you tell me whether you agree or disagree with the following statements?

If there was a change, it would take me quite a long time to get used to and remember a new local dialling code

As long as I knew about it in advance changing the local dialling code wouldn't inconvenience me too much.

If my local area dialling code changed it would be annoying in the short term but I would soon get used to the new dialling code

Q7. If your landline telephone supplier told you that your existing telephone number would have to change unless you paid a one off fee to keep it, what would be the maximum amount you would be willing to pay to keep your existing telephone number?

Q8. And if it was possible that your local area's dialling code would have to change unless everybody with a phone in your area paid a one-off fee to avoid it being changed, how much do you think would be a reasonable amount for everyone to pay?

UK business consumer telephone interviews

Q1. UK landline numbers currently have area codes that indicate the locations of the telephone number. For example, phone numbers for lines in Aberdeen all begin with 01224 or numbers in Brighton begin with 01273. If phone numbers changed and your company was no longer able to tell the location of the telephone number, how would your company feel about that?

Q2. In a few words please tell me the reasons for your answer.

Q3. Which of the following numbers does your company use?

Land line number with area code where office is located
Landline number with area code that is different to where the office is located (e.g. office is in Swindon, but area code is 020 for London)
Land line Non-geographical numbers, e.g. 0800, 0845, 0870, 09
Mobile numbers only

Q4. The current number system allows us to distinguish between mobile numbers and land line numbers – mobile numbers start with 07 and land line numbers start with 01 and 02. If phone numbers changed and your company was no longer able to distinguish between a land line and a mobile number, how would your company feel about that?

Q5. In a few words, please tell me the reasons for your answer

Q6. Which of these statements best describes your company's attitudes to call costs?

We are very aware of cost and try to encourage everyone to spend as little time as possible on the phone
We keep a close eye on costs and encourage everyone to spend less time on expensive calls such as to mobiles or internationals calls.
We are signed up to various packages so it doesn't matter how long we spend on the phone so long as we make calls at the right time or to the right numbers
We look at the headline costs but do not worry about the details
We speak for as long as we need to and don't pay attention to the cost

Q7. Different numbers have different costs associated with them. For example, the cost of a local call from a land line will be cheaper than calling a mobile number or a number that begins with 090. If it were possible to notify the caller of the cost of the call before being connected, how interested would your company be in this service?

Q8. There could be different ways to be notified about the cost of a call – either the caller could listen to an announcement or the call charge could be flashed up on the handset display. If the caller were to be notified by an announcement, when would your company like to be notified of the cost of the call?

Respondents were prompted to the following answer codes

On every call
When calls cost 5p/10p/20p/50p/£1.00/£1.50 per minute or more
I don't want to be notified on any calls

Q9. Alternatively, if the caller were to be notified on their telephone handset display, when would your company like to be notified of the cost of the call?

Q10. Does your company use number codes to block out calls to certain numbers, e.g. international, premium rate services (090 numbers)

Q11. There have been changes to telephone numbers in the past to accommodate the increase in demand for telephone numbers (e.g. London numbers used to be 0171 then they changed to 020 7 and 8). How important is it for a business to avoid a number change and maintain the same number?

Q12. In a few words, please tell me the reasons for your answer.

Q13. It is possible to take your land line number with you if your company moved premises. How important is it to take your business telephone number with you if your business moves premises.

Q14. It is possible that you could take your company land line number anywhere in the UK, i.e. to a location with a different area code. This would mean that area codes could become mixed up and it would not be possible to tell location from the number. Which of these would you prefer…

To be able to move anywhere with your number and possibly lose the ability to identify location
To be able to move within the local area and maintain the ability to identify the location

Q15. Currently numbers are allocated to you by the telephone operators (BT, Vodafone, Orange, Cable & Wireless, etc). However, it may be possible that your company could choose its own number and this number could be permanent. How interested is your company in the idea of a single permanent number for your business?

Q16. Instead of a single permanent number for the business, how interested would your company be in having individual permanent numbers for each of your employees?

Q17. In a few words, please tell me the reasons for your answer.

Q18. How important are special 'golden' numbers to your business, by this I mean numbers that are easily remembered? For example 020 7123 4567

Q19. How much would your business be prepared to pay as a one off payment to permanently keep and own your business telephone number(s).

Q20. Many companies use a combination of mobiles and land lines. It is possible that your company could have one telephone number for both your mobile and your fixed lines and you could decide whether your mobile or your land line or both range when the number was called. How interested is your company with this idea?

Q21. In a few words, please tell me the reasons for your answer.

Business consumers in areas that had a number code change in 2000 telephone interviews

Q1a. Which of the following types of stationery were updated?

Headed note paper/ compliment slips, etc
Business cards
Presentation materials
Other (specify)

Q1b. Can you give me a total cost estimate for updating all items of stationery?

Q2a. Which of the following external signs were updated?

Shopfronts
Vehicles
Advertising boards/ for sale signs, etc
Other

Q2b. Can you give me a total cost estimate for updating external signs?

Q3a. Which of the following marketing materials were updated?

Brochures
Leaflets/ flyers
Other (specify)

Q3b. Can you give me a total cost estimate for updating marketing materials?

Q4a. In addition, there may have been other staff related costs. I'm thinking of the time and effort that it would take employees to ensure the updates are made, etc. Please tell me which of these you think took place?

Informing customers of change
Updating customer database
Updating phone system
Changing burglar alarm

Q4b. Can you give me an estimate of the total time spent by staff and employees in relation to the code change?

Q4c. Were these staff related issues generally carried out by management or admin staff?

Q5a. Companies have also suggested that an area code change costs the business in terms of potential business and / or loss of existing customers. Roughly, what amount, if any, do you think your company would have lost in this respect?

Q5b. For what period of time after the code change was your business affected for?

Q6a. Are there any other costs to your business as a results of an area code change that you think have not been mentioned and should be included?

Q6b. Can you give me a total cost estimate for all other areas?

Q7. How often do you update your stationery?

Q8. Do you generally market your goods/ services…

Locally - i.e. in your own city
Regionally - i.e. in your own city and the surrounding area
Nationally
Internationally

Q9. How many customers/ clients did your company need to inform of the change?

Q10. What is the most common way for your customer / clients to contact your business?

Q11. Does your company have any phone numbers that begin with 08 (for example 0845 or 0800) for your customers to call you on?

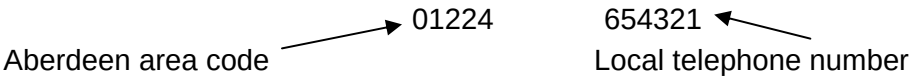
Options displayed

Option A: Wide Area Code Option

Current telephone numbering includes . . .

the local area code + the local telephone number

For example, numbers in Aberdeen currently look like this . . .



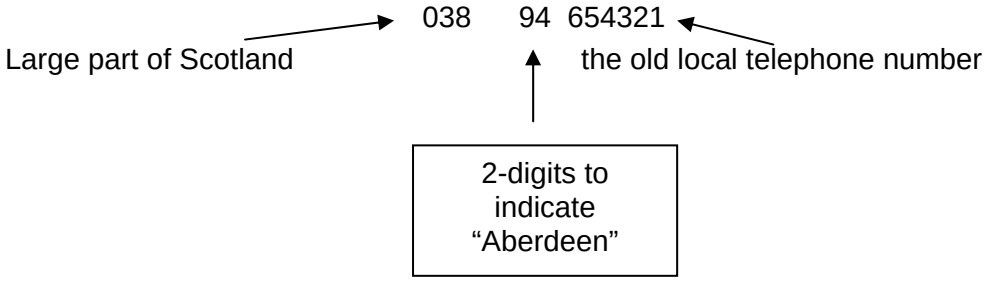
Under the Wide Area Code option . . .

- ◊ The local area code would get shorter but it would cover a wider area (perhaps up to one-third of Scotland, including Aberdeen, rather than just Aberdeen).

  In England, Wales and Northern Ireland the same thing would happen – local area codes would represent bigger areas instead of the individual towns they represent at the moment
- ◊ The local telephone number would get longer

So the Aberdeen number above could become 038 94654321

This is made up of . . .



What would this mean to me?

- ◊ Your local telephone number would change. It would increase to 8-digits, including 2 digits at the front to indicate your location (Aberdeen in our example)
- ◊ Your area code would also change. It would reduce from 01225 to 02x or 03x in our example
- ◊ You would be able to use local dialling when dialling numbers within the same larger area of Scotland.

Option B: Close Local Dialling Option

This option means that local dialling will no longer operate anywhere in the UK.

What would this mean to me?

- ◊ You will always have to dial the full code and telephone number whenever you are telephoning anywhere in the UK
- ◊ Your area code and telephone number can remain the same for years to come.

Option C: Overlay codes

In some areas of the UK, telephone numbers are running out. This means that there is a need to make changes to the current numbering system. Below is one option that is being considered alongside the option of changing area codes which took place in some areas in the 1990s.

Introducing overlay codes:

This option means that, as existing dialling codes run out in some areas, new codes would be introduced in these areas. For example, in Aberdeen landlines have 01224 numbers, but if new codes were introduced in Aberdeen, people or businesses that get a new landline might have a different dialling code, e.g. 02345.

So people or businesses in Aberdeen could have either a 01224 number or a 02345 number.

What would this mean?

- If you already had a landline your existing code and number will stay the same
- Only new numbers will have the new code
- If you have a different code to the number you are calling then you would have to dial the full code and the number (even if they lived next door)