

OFTTEL
SPECIAL RATE NUMBERS
Views of Small and Medium-Sized
Businesses
Qualitative Research Findings
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1. Research Background

Oftel is currently examining the allocation of non-geographic, special rate numbers (SRNs) - e.g. 0800, 0845, 0870, 09.

Research was required to investigate and understand the current purchasing procedures for these numbers amongst businesses.

The research also investigated reactions to potential options for change in current procedure.

Research was conducted between 18th and 28th February 2002 in England, Northern Ireland, Scotland and Wales.

2. Sample Details

- A total of fifteen face-to-face and twenty-five telephone depth interviews (of thirty-five to forty minutes duration) were conducted.
- All respondents represented small to medium sized businesses (up to two hundred and fifty employees, with not less than £50,000 annual turnover).
- The size of respondent companies varied between the very small (sole proprietors and local business) and the relatively large (two hundred employees and national coverage).
- All respondents interviewed were either responsible for, or significantly involved in, the purchase of SRNs for their company.
- The number of SRNs held by respondents represented a range between one and more than one hundred numbers.

- A majority of the sample were using static media (newspapers, magazines, leaflets or directories) to advertise their SRN.
- Also, users of all SRN types were represented within the sample.
- A mix of telephony providers was also attained, including:

BT, Cable and Wireless/NTL, Eurocall, Dolphin, Genweb, TelecomPlus.
- Respondents represented a range of industry type, including:

Motor, Manufacturing, Leisure and Tourism, Telecommunications, Computing, Building/Building services, Retail, Insurance, Legal Services, Finance, Media/Publishing and Healthcare services.
- A mix of male and female respondents as well as a range of respondent ages was also obtained.

MANAGEMENT SUMMARY

- The sample clearly valued their SRNs and saw these as important for the success of their businesses
- There were very few spontaneous complaints regarding the current procedures for obtaining and running SRNs
- 'Golden numbers' were seen as relevant to companies which were planning national campaigns using TV, Radio and Outdoor media
- Those using more 'static' media (leaflets, newspapers/magazines and directories) could see little value in golden numbers
- Decisions regarding the usage, purchase and nature of SRNs were generally seen as very important – and were often made by senior management
- Usage of multiple SRNs was common – with many companies using different SRNs to assess the impact and value of different media or sales mechanisms
- 'Spare' SRNs were typically retained by respondent companies, even if this involved ongoing costs. This again reflects the perceived value of the numbers
- In general it seemed that telephony suppliers were only interested in facilitating larger companies in relation to SRNs – smaller companies found that, while they could get SRNs easily, they had to 'take what they were given...'
- Intermediary companies seem to be providing the required customer service for smaller companies – offering SRN packages (including call centre service) and even golden number searches
- The smaller telephony suppliers were felt to be offering more attractive and competitive services in relation to SRNs

- Very few respondents had changed telephony supplier because of issues relating to SRNs. Equally, porting SRNs between telephony suppliers had not been difficult
- Alpha Numeric numbering was seen as an undeveloped medium, which has still to be recognised by UK consumers. Some respondents had, however, already bought relevant SRNs in anticipation of imminent growth in alpha numeric marketing approaches
- Awareness of the current Pre-Allocation Portability arrangements was virtually non-existent
- Using the existing arrangements to obtain SRNs was seen by many respondents as unrealistic, since they were not sure that their telephony suppliers would be prepared to undertake the work involved on their behalf
- Although there was a limited level of interest in the proposed 'transparent' index of SRNs, a number of concerns emerged:
 - Buying-up of blocks of desirable SRNs by middle-men/intermediaries
 - Potential impacts upon the costs associated with SRNs (particularly the costs charged by telephony suppliers to operate these services)
- Broadly, a majority of the sample felt that the current system for obtaining and using SRNs should remain unchanged
- This attitude may alter if alpha numeric marketing becomes established in the UK, prompting increased values for relevant SRNs

3. Sample Comments

The sample represented a wide variety of companies, both in terms of business area and size/turnover. Equally, respondents companies varied in relation to the focus of their business – while some were marketing nationally, others were only looking for local customers.

The sample reflected a mix of different SRN types, although many respondents were typically using a mixture of freephone and local call rate numbers. Premium rate users were the hardest group to contact – although, again, some companies were using premium rate numbers alongside freephone and local call rate numbers.

Individuals selected for interview were intended to be predominantly telecoms decision makers – on the basis that this was assumed to be the most relevant group dealing with the acquisition of SRNs. In fact, decisions regarding SRNs were generally seen as a subject for senior management involvement. Many respondents were principally involved with all major decisions regarding marketing and sales activity – and for a majority of companies, policy regarding SRNs played a vital part in ensuring that important sales activity proceeded smoothly. Only a small number of companies delegated decisions regarding SRNs (apart from day-to-day administration) to a dedicated telecoms management function.

The sample was geographically spread across all parts of the UK and included businesses located in both rural and urban areas.

A mix of telephony suppliers was achieved, with users from all the major suppliers plus a broad representation of smaller, more specialist, providers.

Respondents varied significantly in terms of the number of SRNs currently in use and also in relation to the perceived importance of these numbers. Some smaller businesses held a single number purely for use in local marketing literature, while others used multiple numbers in order to judge the effectiveness of different marketing routes or media. A few companies held only one or two numbers, but used these as the basis for national advertising, while others simply provided a SRN as a

convenient medium for customer service activities. Some used premium rate numbers as a device to recover costs incurred through providing free internet services.

Overall, the sample included companies with more than one hundred SRNs, as well as companies with a single number. Typically, between five and ten numbers seemed to be the norm.

4. MAIN FINDINGS:

4.1 Respondent Background

Title and positions varied, depending upon on size of company. These titles included: Company owner/Proprietor, Director, Financial Manager/Director, Assistant/Personal Assistant to the Managing Director, Managing Director, Head of Marketing, IT Manager.

Roles in purchasing SRNs also varied. Some adopted the role on in its entirety (i.e. finding an initial telecoms supplier and, where necessary, purchasing SRNs). Others were happy to pass much of the process over to intermediary companies.

For many smaller companies SRNs had not initially been considered as a relevant business option. Canvassing by telecoms suppliers or 'middle men' had generally acted as a trigger for purchase.

Larger companies had better knowledge of SRNs and how to purchase them - and had generally been using SRNs for some time. The process of purchasing SRNs involved input from a greater or lesser number of managers, dependent on the perceived role and importance of the number. The most vital role was felt to be national or large-scale marketing and advertising.

4.2 Current Usage of Special Rate Numbers

The most typical rationale for usage of SRNs was to provide convenient, cheap, telephone access for potential customers. Most of the respondents were, however,

using 'static' media – directories, leaflets, cards, newspapers, magazines – and customers were expected to retain the promotional medium in order to make contact at a later time. Only a few in the sample were using SRNs in an 'above the line' advertising context.

Consequently, the former group was largely uninterested in the actual nature of the number and 'memorability' was not an issue. As a general principle, memorable SRNs were only felt to be relevant for those who were undertaking major national campaigns using TV, radio or outdoor media.

A few respondents had obtained their SRNs through call centres and, effectively, had purchased a response 'package'.

Respondents using 08 numbers felt that their numbers were important and that business generation would be much harder without the service. They believed that potential customers had few reservations in relation to making a call when the call was free or lower cost. Many in the sample felt that the public expects a low cost call number and that using a SRN increases the perceived professionalism of the business operation:

'We aren't a large company and we wouldn't want the public to think that there's six of us sitting in an industrial unit waiting for them to call....when you put an 0800 number in your advertising you look pukka –the public are more likely to take you seriously....'

The respondents with 09 premium rate numbers were generally either providing specialist information services or added-value customer services which could be accessed at a cost. These numbers were felt to provide a valuable source of income.

'My 0900 number gives me something back – I give my clients a lot of service via my website and if they want the platinum service then they have to ring using the premium rate....they can get by using the website but a lot of them want more....'

Many in the sample had 'spare' numbers which they kept in readiness for marketing purposes. Some were waiting for promotional material to 'die away' and leave circulation in order to re-use numbers. Respondents seemed quite unwilling to surrender current numbers and were prepared to pay to keep their current portfolio.

Overall, the sample certainly did value their SRNs, which they saw as integral to the effective operation of their businesses. Equally, there were very few complaints or dissatisfaction expressed with either the functioning or nature of their own numbers.

4.3 Special Rate Number Selection and Purchase

The sample were using a range of telephony suppliers, including: BT, Cable and Wireless/NTL, Eurocall, Dolphin, Genweb, TelecomPlus.

A majority of respondents had changed telephony suppliers at some point in the past – some a number of times – and this was a reflection of proactive canvassing or promotional activity by operators offering differing rates.

Some had sought SRN suppliers through the internet with cost of services being the main motivation.

BT, however, was still a preferred supplier amongst many respondents - because the market was still perceived to be dependent upon BT (as they own the infrastructure that other companies have to use). Many, who had changed companies, noticed that initial cost improvements had disappeared over time, quickly becoming once again comparable with BT. Some respondents reported an excellent relationship with BT account managers and would not want this to change.

Nonetheless, other respondents reported that alternative providers were a great deal cheaper and offered better service than BT.

A few respondents had changed telephony provider because of SRNs – with some companies offering better rates for these (e.g. seven pence per minute for an 0800 number, receiving one penny per minute for local rate numbers). For many smaller

companies, cost was a key issue in relation to all telephony matters – so the supplier with the best offer was always sought.

For other companies, generally with more SRNs to manage, cost was not a major motivation. Service to the SRN system was paramount and, for many, BT was felt to offer improved control of systems. For example, freephone calls go to a call centre, but if this goes down then calls are diverted in a controlled fashion – for one respondent, calls within the Leeds area were directed to their Leeds office and other calls re-directed on a rotation system to appropriate area offices. Some respondents believed that only BT would be able to offer this level of technical flexibility.

0800 and 0870 were the most commonly used SRNs and seen as offering the respondents' customers a fair balance between added value and cost-effectiveness. These were typically used for advertising and promotional purposes, mainly through press, direct mail and directories – although a few respondents were looking at future TV campaigns.

0845 and 09 numbers were less commonly used in this sample. 09 numbers were not used by many because of the cost to end customers. Smaller companies in particular wanted to offer their customers '*..that bit extra, go the extra mile*' and were wary of increasing access costs.

SRNs were used for a number of reasons:

- to balance the costs of running other services and media
- to monitor/track calls coming from different service providers and provide feedback concerning different promotional media
- to provide a service for local customers, who were felt more likely to call a freephone number
- to provide a benefit for loyal customers - with some companies having 0870 numbers for customers to use after an initial 0800 contact. One company used 0800 for TV ads and 0870 for press ads.

Those that had begun to use SRNs found them to be very valuable in terms of:

- bringing in business
- monitoring internal clients
- judging advertising impact
- giving geographical breakdowns of sales performance
- specifying times and rate of calls in response to advertising or sales activity.

Generally they were seen as vital for effective marketing

'It is incalculable how much business it brings in...'

Some respondents have been approached by their telephony supplier regarding the concept of SRNs:

'Asking did we want them and here's what we can offer....'

Offers included free routing of unanswered calls to a call centre to take messages and pass on information, as well as cheaper use of 0800 numbers.

Most did not have a specific requirement regarding the SRN (although many admitted that numbers which were memorable would be of value, but this was dependent on cost) and some assumed that golden numbers were more expensive than ordinary SRNs.

Most had not chosen a number themselves and had simply been provided with them by their telephony supplier or a 'middle man' provider. Some had asked if there were different numbers available, but most had not chosen specific numbers.

A majority did not know that a choice of SRNs was available and instead trusted their supplier:

'I assumed all the good ones would have gone...'

Likewise most did not know that specific numbers could be sought – which was a popular option, although cost was an important factor:

‘You have to ask - how much will it cost, will it be worth it?...’

Only a minority of the sample were actually given a choice of numbers by their supplier and few knew they could ask to see a selection of SRNs. However, most felt it would be very useful to see what was available. A small number of respondents, however, simply did not want to know and saw their SRNs purely as a convenient method of generating extra business – the deeper ‘marketing’ and business aspects of the service were not considered.

A majority of the sample did not know (and had not been told) that they could ask their supplier to get a SRN from a different supplier (although some larger companies did know this and had used the facility). For many this was not relevant because they did not particularly care which number they had. For others, where a more memorable or recognisable SRN would have been useful, there was disappointment that better quality SRNs had not been offered.

Respondents were also unsure whether they would be concerned enough to change supplier in order to obtain a specific number – factors such as cost and available services would be influential.

There was definite interest in being able to keep SRNs long term, because of their value in terms of advertising and existing customer base. Respondents knew that ‘normal’ numbers could be kept when suppliers were changed and assumed that the same was true for SRNs.

Small companies tended to keep numbers permanently (as long as they were in business). Larger companies were using specific numbers for particular campaigns. Some numbers were then left to ‘die’ after the campaign, while new ones were used for later campaigns. One larger company kept all their SRNs permanently and left them shut down until required – paying a premium to do so:

'This just works out easier to organise when we need them....'

There was some evidence of suppliers competing in relation to the provision of SRNs and this was particularly evident among smaller companies who had taken time to search amongst providers. They had found variation in terms: cheaper use of 0800 numbers, better returns on 087 numbers and free redirection of unanswered calls. However, many other respondents had not sought out alternative providers unless they had been specifically approached with special offers.

Very few respondents had actually been seeking choice in relation to their SRNs. Many simply wanted to get a number into use quickly in order to get advertising material produced. Consequently, many had gone directly to specialist intermediary companies who had provided the required numbers 'without fuss'.

These companies specialise in providing SRNs and will even 'seek out' specific numbers if the client wishes. There were some complaints about the cost involved in using these companies - but many respondents also felt that they were paying a fair price for the simplicity and convenience of outsourcing the task of finding SRNs.

Only a very few respondents had obtained their numbers through their telephony company. Generally, the telephony companies were felt to be uninterested in providing SRNs, except for large customers. As confirmation of this view, the largest company in the sample, which also generated large volumes of telephony traffic, was the only participant to express confidence in their ability to get good, flexible, service from their telephony provider.

Very few companies had any 'golden numbers'- although some respondents had sought these, but without luck. One company wanted the numbers used by a company providing the same service which had ceased trading (so they wanted to take over their numbers, one of which was 'semi-golden'). All the numbers were well known and advertised and thus represented great potential value. The company's telephony supplier had told them that these SRNs were not available and they would not be able to obtain them.

Another company was informed by BT that they were unable to have any input in selecting any SRNs. BT informed the company that SRNs were only issued sequentially and they would *'get what they was given...'*. The respondent company had been seeking a memorable golden number. Eventually the company had been given both an 0870 and an 09 number, which were not at all *'golden'*.

'They told me that it's just done randomly – you get the next number in the sequence and there's no way to change the system.....I asked about particular numbers, but they said that I would have to go to a specialist company.....'

The respondent companies which did have golden numbers tended to have only golden numbers (0800 and 0870 for TV and press advertising). These companies had good relationships with telephony account managers and had simply approached these individuals when they needed numbers. Typically, the supplier came back with all the SRNs available and the company selected those that it wanted. They used these new numbers for major promotional campaigns, but also kept a secondary group of golden numbers (up to twenty) in reserve for other uses.

It was evident that this aspect of choice in relation to SRNs was only possible for larger companies and the relevant respondents recognised this very clearly:

'We put a lot of business their way, a lot of calls every day, and we certainly do have the clout to make them jump if we shout...if I make a call to my supplier I get called back immediately....'

Smaller companies typically felt that they were not bothered about golden numbers:

'I give cards out to all my customers and also tell them that if they lose them then I am in the yellow pages with an 0800 number...'

There was no evidence of alpha-numeric usage of SRNs and many respondents were sceptical about the immediate prospects for alpha-numeric marketing. Most respondents recognised the alpha-numeric concept (which was strongly associated with the USA) and one currently held a relevant SRN (he was lucky and found '0800

– incept’ with their current supplier). Many in the sample could see these type of numbers becoming more common in the future:

‘This country just hasn’t caught on to it yet – we’re not like the Americans, they have had it for years. The real problem has been getting handsets with a standardised design – some haven’t even had the letters printed in the keypad. Nowadays it’s getting better and I think that alpha-numeric will get more common before long...it will just take a large company to do a major national campaign using that method...’

Generally, respondents were ‘waiting to see’ what will happen with alpha-numeric marketing and were conscious that choosing SRNs will become a more complex process if this becomes the norm. A few respondents had decided to invest in relevant numbers ‘just in case’ – including one respondent who was aware of pre-allocation portability and had asked his telephony supplier to obtain several specific numbers from BT.

It was clear that none of the respondents had experienced problem in obtaining SRNs and, while a few were concerned by the cost involved, most felt that their numbers represented excellent value for money. Even those that had used ‘middle men’ still felt that they had got value for their money:

‘They do all the work – you just pay your £200 and it’s there and working...that’s worth it for me, I just want to concentrate on running my business...’

Some respondents even felt that SRNs were currently under-valued, except for the very memorable numbers which were seen as ludicrously over-priced.

‘Porting’ existing SRNs had not caused problems. Respondents had been able to move current numbers between telephony suppliers without difficulty or cost.

Telephony supplier was seen as a quite separate issue from SRN provider. Very few of the sample had even contemplated switching telephony supplier on the basis of access to SRNs or vice versa. There was an assumption that numbers could be retained even if telephony supplier was changed.

The respondents were pragmatic and business-like in their attitudes towards SRNs. They believed that commercial factors would always ensure that numbers would be available when required. Equally, all were sure that telephony suppliers could not 'repossess' numbers without customer consent or proper justification:

'The companies have to facilitate the customer much more these days –the big boys are still a bit stiff but there's always someone else who will want your business...and there's more protection for the customer, telephone companies can't push you about like they would have done in the past...'

4.4 The Future

There were very few complaints regarding the current system for obtaining SRNs – respondents felt that there was a responsive marketplace which is offering good service. The role of the telephony provider was generally seen as peripheral.

A majority of the sample felt that there were no current restrictions upon businesses in relation to SRNs.

Until challenged, respondents were generally accepting of the current system: *'This is how it works..'*. Smaller companies were generally less knowledgeable about what choices they had – unless they were particularly interested and prepared to put in the time to seek out new providers:

'It is difficult to know where to go to find information about suppliers, I spent hours searching the net to find something. That needs some input...'

When asked, respondents found it difficult to come up with alternatives to the current system. Most were keen that telephony suppliers should show what SRNs they have available as well as making it known that customers can get numbers from other providers if required (although there was recognition that this would involve additional cost). Essentially, cost factors seemed most likely to determine whether

respondents would take up this option and only the more wealthy companies appeared certain to do so.

Restrictions were not recognised until alternatives were offered. The more knowledgeable respondents regarding telecoms issues, felt that customers deserved to understand the process of allocating SRNs – particularly those that had been told that numbers were only assigned sequentially.

Many respondents (especially those from really small companies) did not believe that their telephony supplier would be interested in seeking out SRNs on their behalf. The respondents companies which were confident in their ability to motivate their supplier were already doing so.

Of the options listed, option three was generally felt to be the best and the least complex – owning a number would allow more freedom to change supplier and negotiate rates, although many in the sample did not want to change anyway.

However, concerns raised by the respondents were:

- the cost: how much would it be likely to cost for memorable numbers and how would this affect the cost of running the service? (would providers charge more because they were not making money from getting the number itself)
- the potential for big companies to buy huge amounts of numbers and sell them off at great costs – smaller companies would suffer
- could this adversely affect relationships with account managers?

In general respondents would be interested in this approach and imagined cost levels would vary between twenty-five and five or six hundred pounds – dependent on the ‘golden-ness’ of the number.

Respondents would also expect to pay a handling/service charge to their provider in lieu of the rental system now in place for SRNs.

More knowledgeable respondents saw this system as being the same as that in place for domain names – a system seen to work well, although open to abuse by unscrupulous middle-men. Equally, many others mentioned the DVLA car registration site:

‘Where someone buys a lot of numbers for £200 a time and they then appear in the Sunday papers for more than a thousand...’

Overall, many respondents, including the genuinely well informed regarding SRNs, were happy to leave the current system unchanged. Although it lacks transparency, the sample felt that they were not incurring excessive costs for using SRNs and, generally, respondents companies were getting the service that they required.

Concerns regarding ‘buying up’ of all useful SRNs and the creation of a truly cost-driven, middle-man-dominated, marketplace generated a fear that the proposed changes could ultimately end up costing businesses more:

‘At the moment, no-one is really winning – those with clout get a better deal, but us smaller fry also get a reasonable service, so why do we want to draw attention to things and create a new breed of telecoms sharks who will make everything much more expensive?...’

APPENDIX A – FOCUS GROUP TOPIC GUIDE

Introduction

- Introduce self, company, MRS code of conduct, confidentiality and the task of the session – **emphasise that the research is not about changing their special rate numbers/code changes**
- name, age, hobbies/lifestyle

Respondent background

- Title/position
- Role in purchasing/acquiring non-geographic/special rate numbers telephone numbers (eg freephone 0800, local rate 0845, national rate 0870, and premium rate 09 numbers)
- Which telephone operator are you currently with?
- Has this ever changed? Why/why not?

Special rate numbers

- Does your company currently have any special rate numbers?
- Approximately how many do you have?
- How long have you had special rate numbers?
- Have you got any recently?
- Are any of these **'golden numbers'**? – explain e.g. memorable numbers (0800 123 456)
- Are any alpha-numeric numbers? E.g. 0800 – heating
- What are these numbers used for? Eg customer call centres
- How valued are they?
- Do you think your customers 'know' the number, or do you think/expect them to have to look it up?

Number selection

- How did you go about obtaining your special number? What was the process?
- Did you have any criteria for the number you wanted? What were these? (0800 28 28 20 etc)
- Did you get to choose a number or were you offered one?
- Did they take it or did they ask for a different one? Why? Why not?
- Were you happy with it? Would you have preferred a choice?
- Have they ever asked for a particular number?
- Were you able to get the number you wanted? Why couldn't they get it? Why haven't they asked?
- Do you know if it is possible to ask for specific numbers?
- **If yes**, how do you know?
- **If no**, did you know you could ask for a different one?
- In general, how would you feel about being offered a number – would they prefer a choice?

- Did your telephone operator show you a range of numbers that were available?
- Did you ask to see a range?

- Would it be useful/valuable to you to see a range of numbers? Why?
- Would you like to see which numbers would be available to use?
- If your supplier didn't have the number you wanted would you consider changing supplier or would you just take a number that they did have?
- Would you/have you ever asked a supplier to get a number from another source eg an alternative supplier? Why/not?
- Did you know this was possible? Where did they find out they could do this?
- Did their supplier ever offer this information?

- Which did they select first, their supplier, or the number?
- Would you ever consider doing it the other way round? Why/not?
- Which is more important, the supplier or the number?

- Have you ever switched suppliers and tried to keep the existing special rate numbers? Why? Why not?
- Was there any resistance to this? Who from? What happened?
- How valuable is it to you to be able to keep the same special rate numbers? Why / why not? How is this value measured (cash value?)
- Would it discourage you from switching supplier if you could not keep your number?

- Do you have any numbers that you use only occasionally eg particular marketing campaigns etc?
- What do you do with these numbers when they're not being used? [Current rules require numbers that are non-active for several months to be returned to the operator, or they can pay a premium / rental to keep them]

Or

- When you have a campaign do you simply expand capacity over your existing numbers? (Is there any evidence of businesses rationalising their special rate numbers?)
- In your experience, what evidence is there of suppliers competing on provision of special rate numbers – eg price differences, offering choice of numbers, do some have better choice/range of numbers than others?

The future

- How happy are you with the current choices/system for getting a special rate number? Why / why not? (explain where necessary)
- Do you think special rate numbers should be allocated any other way? (directly to themselves?)
- Do you think the present system could be improved? In what ways?
- What do you like/dislike about the current system? Why?
- Do you feel restricted in any way by the current system? eg in their choice of numbers / suppliers / switching, by the process – how, describe?
- What could be / would they like to see done about this?

Potential alternatives – highlight the 3 alternatives and ask for positives and negatives about each:

- 1. Pick current numbers from current suppliers*
 - 2. See all numbers available and use the existing pre-portability system to get the number you want ie ask your preferred supplier to get the number from another supplier*
 - 3. Keep number choice completely separate from supplier choice ie pick the number from an independently managed pool and then pick a supplier separately for service*
- What about a central pool of special rate numbers from which they could select, separating supplier from number provision?
 - How would they feel about this?
 - What benefits would it offer? Eg encourage / easier switching? Greater choice of supplier?
 - Would it encourage them to switch more readily if they could ‘own’ the number?
 - What disadvantages could they see to this system? (potential buying up numbers by big companies to sell on at a premium)
 - How strongly would they feel in favour of it?
 - Would they be prepared to pay more for their special rate numbers if they got to choose them from a central pool? Why / why not? How much?