



Telephone Numbering Program The London Project

Qualitative Research Report

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Section 1

Introduction

1.1 Background

The London Project is part of the numbering program and deals specifically with the need to introduce a new range of London telephone numbers.

The proposed new sub range will begin with a '3' (i.e. (020) 3XXX XXXX). All existing numbers beginning with a '7' or an '8' will remain unchanged and new numbers beginning with a '3' will be introduced around the end of 2004/beginning of 2005.

Ofcom was concerned that there may be consumer misconceptions about the current numbering system – for example, that London codes are 0207 and 0208 and/or that London still has 7-digit local numbers (i.e., following the 0207 or 0208 code). These could result in the introduction of '3' numbers being perceived as “another London number change” and could lead to misdialing and the loss of the cost and time benefits of local dialing.

Ofcom wished to conduct market research to assess the impact of the introduction of (020) 3 numbers, and to inform the development of its communications campaign.

1.2 Research Objectives

The key objectives of the research were to

- Assess the extent and type of acceptance or resistance to the proposed changes
- Understand all issues relating to current London dialling codes
 - Level of understanding of the current codes
 - Overall feelings/impressions
 - Current misconceptions
 - Perceived value of current codes (e.g. local identity, prestige, link to property value)
- Understand all issues relating to the proposed new changes
 - Overall feelings/impressions
 - Possible misconceptions
 - Perceived values or drawbacks
- Recommend potential routes for communicating the proposed new sub-range

1.3 Approach

Focus groups were recommended over depth interviews so that the views and opinions of a wide range of people were represented, whilst also covering the issues in some depth.

Instead of traditional focus groups (i.e. 8 respondents per group with a duration of 1½ hrs to 2hrs), mini focus groups – each of about 40 minutes in length – were recommended. This approach meant an opportunity to gather views from almost twice the number of people than would be possible with traditional focus groups, yet still allow for a good deal of discussion, in-depth questioning and elicitation of thoughts and feelings about the issues surrounding the proposed number change.

In addition, the view was that an amendment to London numbers, in whatever form, could provoke strong reactions and, as a result, the need was to avoid ‘hot-housing’ the issue. Providing people with too long a period to consider the subject risked creating an unnatural and overly considered response, and this could have led to undue negativity. The aim therefore was to keep the groups short in duration and smaller in number in order to ensure discussion at the spontaneous level.

1.4 Sample

In conjunction with recommendations from Ofcom, the following sample was agreed

- Residential
 - Regular Callers (more than once a week) – from (020) 7 and (020) 8 fixed line numbers
 - Not so frequent callers (weekly, monthly) – from (020) 7 and (020) 8 fixed line numbers
 - Not so frequent callers (weekly, most weeks, ‘ever’) – Outside London
- Business
 - Regular Callers – from (020) 7 and (020) 8 fixed line numbers
 - Regular/Not so frequent – Outside London
- Each residential group included
 - A mix of age groups
 - A mix of gender
 - A mix of socio-economic grades
- Each business group included
 - A mix of industry sectors
 - A mix of size
 - Heavy users of the telephone for their business

1.5 Sample frame

Location	Audience Type	No. of mini groups
Camden – for (020) 7 numbers	Residential Regular	3
	Residential Less Frequent	1
	Business	3
Croydon – for (020) 8 numbers	Residential Regular	3
	Residential Less Frequent	1
	Business	3
Manchester	Residential – Outside London	2
	Business – Outside London	2
	TOTAL	18

In each location, the mini groups were conducted during one afternoon/evening in a dedicated viewing facility. The groups were conducted on 7th, 8th and 9th July 2004 by Robert Waddington of Gabriel Ashworth Ltd.

1.6 Discussion Flow

- The mini groups followed an agreed discussion guide, summarised as follows . . .
 - Brief introduction of moderator and respondents, including a summary of telephone usage (mobile and fixed line)
 - Introduction of new number range using Stimulus 1 (cf Annex 1). Respondents were asked write down first thoughts individually
 - Spontaneous discussion of all first thoughts. No explanations given by moderator at this stage
 - Discussion around current understanding and perceptions of current London codes/numbers – (020) 7 and (020) 8
 - Discussion around introduction of new (020) 3 range
 - Presentation and assessment of a number of potential communication routes.

Section 2

Executive Summary

2.1 Key Findings

- **Initial responses indicated some irritation at another perceived change**
 - Several mentioned that, at the time of the last change, promises had been made that there would be no more changes and as a result the “authorities” were seen as lacking foresight
- **Once it was understood that current numbers were not changing, the proposed new range was widely accepted – so long as a reason was given**
 - There was a general understanding that London was growing and a new range was an inevitable consequence. Several wanted to be given a reason as the last change was considered to be fairly recent
- **There was a widespread misconception that London has two codes – 0207 for Inner and 0208 for Outer**
 - Almost all residential customers in the sample thought there were two codes. Only a minority of business users in London were aware that the code for London was 020
- **Introducing the new range as (020) 3 suggested to many that this was an introduction of a new code rather than a new range of numbers**
 - In Manchester, the idea of one 020 code for London was considered an advantage and much easier to deal with than the idea of a new “third code”
 - It was important for a minority in the 020 8 area and in Manchester that this 020 3 “code” was clearly communicated as part of London so that charges would be the same as those to other London “codes”
- **First responses to the (020) 3 range focused on two key issues and explanations for both were required**
 - **Where would these numbers be located?**
 - **What sort of numbers would they be – residential or business or special numbers?**
- **The description of London numbers as beginning with a ‘7’ or ‘8’ and ‘3’ caused difficulties as most understood these numbers to be part of the “codes” for London (i.e. 0207 and 0208) and not part of the number**

- **Awareness and usage of local dialling (London only) was generally limited to business users. Most residential users were either not aware of, or did not fully understand, this facility**
 - Business users tended to use local dialling in spite of any misconception about London codes
 - Residential users tended to use local dialling just within their own area (i.e. dial '8' if in a '8' zone) or dial the full code at all other times

- **Respondents liked to associate numbers with a location but the emergence of non-geographically specific numbers from new operators meant local identification was felt to be disappearing**

- **As a result, Londoners tended to view the '(020) 7' and '(020) 8' numbers as the last remaining means of local identification, albeit rather imprecise**
 - Most inner London users regarded other '(020) 7' users as local – and small business saw this as valuable
 - Surprisingly, '(020) 8' users would also regard other '8' numbers as local – even though many were aware that this area stretched all around London
 - There was some concern that smaller businesses with (020) 3 numbers would be at a disadvantage by not being perceived as local

- **There were few associations (e.g. prestige, property value, etc) with (020) 7 numbers and (020) 8 numbers. Similarly, associations with (020) 3 were limited to a single mention of the '3' mobile network**

- **Communications that were clear, straightforward and factual were preferred to those that were seen as attempting to be amusing or friendly in tone**
 - Business customers tended to prefer shorter communications
 - Residential customers tended to require more lengthy explanations

Section 3

Research Findings – In Detail

3.1 First Responses

- Respondents were presented with Stimulus 1 and asked to write down, individually, their initial responses. Stimulus 1 was designed to be relatively undetailed in order to stimulate discussion and elicit all thoughts and concerns

London’s telephone numbers currently begin with either a ‘7’ or an ‘8’

London needs more telephone numbers so there is a need to introduce a new range of numbers

The proposed new range will begin with a ‘3’

- First responses raised similar issues in all three locations . . .
 - Initial irritation at a perceived number change
 - *“Not again, they only did this a few years back, this is really going to annoy people especially businesses” (Camden)*
 - *“This is ridiculous, it’s really expensive to change all the stationery, etc” (Croydon)*
 - *“Bloody nuisance – having to change all the numbers in the database” (Manchester)*
 - *“Why do they need to do this – we’ve got so many more numbers what with mobiles?” (Camden)*
 - Recall of previous communications suggesting there would not be another change
 - *“I remember they told us last time that there would never have to be another change and here it is” (Camden)*
 - *“The last round of ads said quite specifically that we wouldn’t have to change again – what’s the matter with these people?” (Croydon)*
 - A perceived lack of planning by the “authorities”
 - *“I don’t know who’s responsible for this but they’re a shambles – can’t they work it out that we’re going to need more numbers and settle on something that is a bit longer term” (Croydon)*
 - *“The people who work this out can’t be that bright – they seem to change their minds every few years” (Manchester)*

- Why the number '3' and not '6' or '9' to be adjacent to the current '7' or '8'
 - *"Why not '6' or '9'? (Camden)*
 - *"'3' seems a bit of an odd number – doesn't seem to make sense" (Manchester)*

- London numbers do not start with '7' or '8'
 - *"London numbers start with any number – don't know what they're talking about" (Croydon)*
 - *"The '7' and '8' are part of the code for inner and outer not part of the number" (Manchester)*

- Which part of London will it cover?
 - *"Is this going to fit outside the (020) 8 outer area – a new outer outer ring?" (Camden)*
 - *"Where's it going to fit in – is there a specific area for this like north of the river?" (Croydon)*
 - *"Where's it going to be then?" (Croydon)*
 - *"London's a region so where's this going to fit in?" (Camden)*

- Who will the new numbers be for?
 - *"Will these be just for new businesses or for residential as well?" (Camden)*
 - *"Is this one of those special numbers – like you see on TV?" (Croydon)*

- But there was a general acceptance of the new number code so long as current numbers do not change
 - *"Makes sense I suppose, London seems to be growing so new numbers will be needed" (Manchester)*
 - *"I can understand there's a need for more numbers" (Manchester)*
 - *"Doesn't bother me so long as we don't change our current number" (Camden)*
 - *"We'll all get used to whatever's going to happen – we always do, it's not a big thing" (Croydon)*
 - *"If people get to keep their current numbers, they can do what they like" (Croydon)*

3.2 Current Understanding of London numbers/code(s)

- There was widespread misconception about London codes among residential users and several business users in all three locations

- The majority thought there were two codes for London – 0207 was Inner London and 0208 was Outer London
 - *“It just follows on from when we got 0171 and 0181” (Camden)*
 - *“It used to be 01 for a long time and then they split it up into two area codes for inner and outer London as far as I know” (Manchester)*
 - *“When I’m giving my number out I always say 0207 and then the number” (Camden)*
 - *“They split London into two areas some years back and it’s stuck ever since” (Croydon)*

- This perception was reinforced by the way respondents wrote down their full telephone number – the ‘7’ or ‘8’ was most often appended to the code (020) followed by the seven digit number e.g. 0208 123 4567
 - *“I’ve always written it like that – in fact when I ring directory enquiries I get confused when they read out the number with the ‘7’ or ‘8’ joined to the number, I can never remember it” (Croydon)*

- A minority of business users in both London areas were clear about the code and how it was intended to be used
 - *“Yes, I know that because if you’re ringing in London you don’t have to use the 020 bit, you just dial the ‘7’ or the ‘8’” (Camden)*
 - *“That’s the way we have it on our letter heads and it makes sense when you’re dialling in London” (Croydon)*
 - *“I think that’s how they’d like us to see it but I’m sure most people don’t” (Camden)*

3.3 Awareness and usage of local dialling

- The majority of London business users used short dialling (i.e. would dial a '7' prefix when calling from the '8' area, and vice versa) in spite of any misconception about London codes
 - *“Never really thought about it – I just know that it works that way and that’s what I do” (Croydon)*
 - *“I suppose I don’t know what I’m doing, I just do it – I just dial the ‘7’ and ‘8’, that’s what I’ve always done” (Camden)*
 - *“I always short dial when at work and never really thought about the code for London” (Croydon)*

- But among London area residential users, there was uncertainty and, in some cases, no awareness of local dialling
 - *“You have to use the full code if you’re dialling into the other London area – you can’t get through otherwise” (Croydon)*
 - *“I always dial the full code for numbers outside the ‘020 7’ zone – I can’t get through otherwise” (Camden)*
 - *“I’ve always thought that you can dial just the number if they’re in the same area but if they’re in the ‘020 7’ area, then you’ve got to dial in full” (Croydon)*

- As a result many residential customers in London did not use local dialling between inner and outer zones and would dial the number and code in full
 - *“I don’t know why I do it but it’s just force of habit really – I probably know that I can but I just dial it in full anyway”*
 - *“I’m just used to doing this on my mobile so I just do the same on the land line” (Camden)*
 - *“It’s illogical I know - I know I can dial just the first number but I still do it anyway – I suppose it’s just to be safe” (Croydon)*

- A small minority of residential customers in Croydon did not consider themselves part of London and were unsure whether calls to (020) 7 numbers were charged at a higher rate
 - *“You know I’m not sure, I always dial 0207 for London, it could cost more”*
 - *“It’s a bit confusing round here because our local calls are not just 0208 numbers, we get local rates to other numbers which are just down the road – so I don’t know”*

- Manchester business and residents would, of course, dial in full anyway and so local dialling was not an issue

3.4 Numbers and geographical significance

- Respondents liked to associate numbers with a location – and several in London recalled local areas through the three digits after the 7 or 8 in London numbers, which related to the old BT exchange areas:
 - *“around here was 684, 676, etc – so if someone had those prefixes you knew they were local” (Croydon)*
 - *“It’s not important, it’s just nice to know where you’re calling – you kind of picture them in your mind when dialling a different neighbourhood” (Camden)*
- But there was a growing acceptance that local geography was disappearing in London due to the emergence of new unrelated numbers, often via non-BT operators
 - *“There are so many numbers now – what with cable and Mercury – you can’t really tell where anyone lives anymore” (Croydon)*
 - *“I used to be able to tell if someone was local by the first three digits (Croydon)*
- As a result, there was a strong sense that Londoners looked to the ‘7’ and ‘8’ areas as some means of local identification, albeit rather imprecise
 - *“I don’t know why but I like having some idea where I’m calling and ‘7’ numbers mean local to me” (Camden)*
 - *“I know that if I ring within the ‘(020) 7’ area, they’re likely to be local and this is useful when choosing suppliers” (Camden)*
- And this local identification was considered important by small businesses, particularly in the (020) 7 area
 - *“I wouldn’t want to lose the ‘7’ part of my number – it shows to many of my clients that I’m local which is where most of my trade comes from” (Camden)*
 - *“I’d worry with the new number that no one would know where I am” (Camden)*
- Surprisingly, there were quite a number in Croydon who felt that (020) 8 numbers were local – even though many were aware this area stretched around London
 - *“I don’t know why but I think (020) 8 numbers are local and I’ll call them before (020) 7 numbers if I’m looking for supplies”*
 - *“I know the (020) 8 area is big but it feels more local than the (020) 7 numbers”*
- There was little sense of prestige attached to (020) 7 numbers over (020) 8 numbers – apart from a small minority in Croydon
 - *“It says to me that the business must be pretty well established, quite well off if they’re in the centre of London”*

3.5 Response to proposed 020 3 sub-range

- Responses were largely focused on two issues
 - Where would (020) 3 numbers be located?
 - Who would be issued with the new numbers?

- Explanations to both these questions were considered important to everyone
 - *“If there is no locality to the new numbers, then we need to be told so I don’t start wondering whether they’re in London or not” (Camden)*
 - *“We need to be told that it’s the same as (020) 7 and (020) 8, so it’s clear we won’t be paying more” (Manchester)*
 - *“I’m going to wonder where they are anyway – but if I know it’s in the London area, it’ll make more sense” (Croydon)*
 - *“If it’s just relating to new businesses then it would be good to know – either way, they need to tell us who’s going to get the numbers” (Croydon)*

- There were very few associations with the number ‘3’ – just one mention of the ‘3’ mobile network – instead most wondered why the number ‘3’ was chosen rather than either ‘6’ or ‘9’

- In Manchester, several thought a third code for London was somewhat unnecessary
 - *“I know London’s big ’n all, but do they really need a third code?”*
 - *“Sounds a bit like they’re showing off again down there!”*

- As a result, a campaign that communicated the 020 code for London was largely welcomed in Manchester
 - *“That’s much easier for us – they should get that across straight away”*
 - *“It would seem a good idea to do that now, save all the confusion when they introduce another range”*

3.6 Communication

- Respondents were shown four possible routes for communicating the new range. Each varied slightly in content and tone.
- Broadly speaking, business customers tended to prefer shorter communications, whereas residential customers tended to require more lengthy explanations.
- Communications that were clear, straightforward and factual were preferred to those that were seen as attempting to be amusing or friendly in tone, e.g. – *London’s residents and businesses are phone number hungry!*
 - *“It’s not as if we’ve got a choice in the matter – just tell it straight and don’t try to be fancy” (Camden)*
- Different formats for the new number range elicited different responses
 - Describing numbers as beginning with a ‘7’ or ‘8’ and ‘3’ was problematic as most saw these numbers as part of the code
 - *“London numbers begin with any number – down here many begin with a ‘6’ (Croydon)*
 - Presenting the new numbers in the form of 020 3xxx xxxx was also seen as confusing and disliked by almost everyone
 - *“You need a degree in astrophysics to read that – it’s a real muddle” (Camden)*
- There was agreement that communications should include the phrase “newly supplied” numbers rather than just “new” numbers. “Newly supplied” was felt to emphasise more strongly that current numbers were not changing