

London telephone numbers:
New sub-range for London: (020)
Research report, February 2005

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Section 1

Introduction

(020) 3: A new telephone number sub-range for London

- 1.1 '020' became the Geographic Area Dialling Code for London in 1998 with the purpose of increasing the numbering capacity to meet demand. However, available numbers beginning with a '7' or an '8' are now nearing exhaustion - and in the summer of 2005 a new sub range, beginning with a '3', will be opened up (i.e. (020) 3XXX XXX). All existing numbers beginning with a '7' or an '8' will remain unchanged.
- 1.2 Consumer research was required to:
 - Assess the level of public knowledge on London dialling codes and numbers
 - Aid policy thinking about necessary advertising and PR and identify critical elements of a marketing programme
 - Track consciousness and change in perceptions towards (020) 3 numbers
- 1.3 This report provides an overview of the key findings of residential and SME consumer awareness and perceptions of London dialling codes, taken from surveys, conducted between November 2004 and January 2005. Previous research had been conducted in August 2004 – and findings from this earlier wave has been included, where appropriate
- 1.4 In late May 2005, shortly before the first (020) 3 number blocks will be made available to communications providers, Ofcom will begin a public information campaign to drive awareness of the additional sub-range for London. The campaign will include:
 - Working with major communications providers to ensure key messages about the (020) 3 range are included in providers' customer communications.
 - Working with trade bodies and business groups to provide information for small, medium and large businesses about the additional number range.
 - Consumer awareness advertising in 4,000 London Underground carriages and 75 London and South-East England local and regional newspapers.
 - Distribution of a consumer information leaflet via Citizens' Advice Bureaux, public libraries, doctors' surgeries and enclosure within Ofcom mailings.
 - Ofcom news release and associated radio, television and newspaper interviews.

1.5 The residential survey was conducted for Ofcom by ICM Research amongst 1,000 adults living in Greater London¹. The SME survey was conducted by Continental Research amongst 805 SMEs across the UK. The report has been prepared by Ofcom, based on results provided by ICM Research and Continental Research^{2,3}.

1.6 This report covers:

- Awareness of the introduction of the (020) 3 sub range
- Perceptions of existing codes for London
- SME understanding of London dialling codes

1.7 A copy of the questions used is attached in Annex A.

¹ ICM Research interviewed a random selection of 1,000 adults aged 16+ by telephone between 14 December 2004 and 9 January 2005. Interviews were conducted across the Greater London area and the sample has been weighted to reflect the population of the Greater London area.

² Because the surveys were conducted amongst a sample of adults/SMEs, rather than the whole population, the data may be subject to a small margin of error. The error margin for the total sample of 1,000 consumers is approximately 2-3% and approximately 2-4% for the sample of 805 SMEs. All data shown is weighted data. Unweighted base sizes are shown on charts and tables to show the number of people who were asked the question. Results referred to as 'significantly' different, have been tested at the 95% level of confidence and hence are outside the error margins and therefore can be considered real differences

³ The report should not be seen as recommended best buys and should not therefore be relied upon when making purchase decisions. Ofcom has conducted its own checks on the data in this report and whilst we consider it to be correct, Ofcom accepts no liability in respect of any of the results provided to it by ICM Research or Continental Research or any decisions taken by any person in reliance on the report.

Section 2

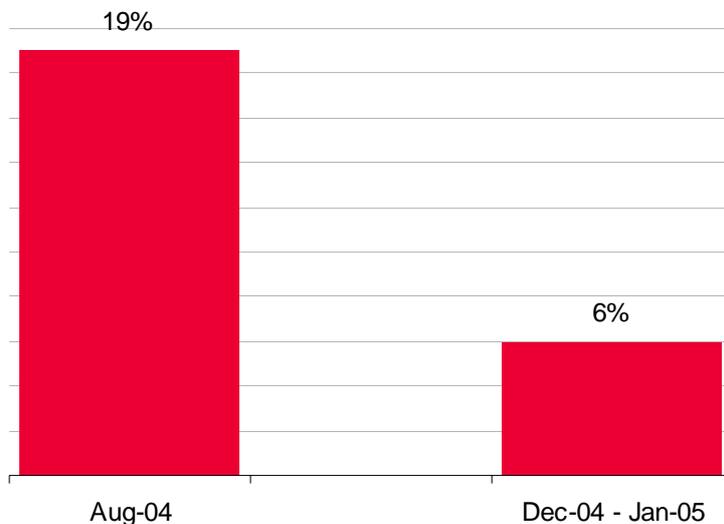
Londoners' awareness of the introduction of the (020) 3 sub-range

Steep drop in residential consumer awareness of the new (020) 3 sub-range

- 2.1 During the most recent research period (Dec 2004 – January 2005), 6% of adults living in the Greater London area reported an awareness that the (020) 3 sub-range will be introduced. This represents a steep drop since August 2004 when 1 in 5 adults (19%) claimed a knowledge of its introduction.
- 2.2 The higher level of awareness seen in August 2004 is likely to have been driven by press/news coverage about the (020) 3 sub-range shortly before the survey was conducted. This fall in awareness levels between August and the end of 2004 potentially highlights the need for ongoing communication regarding the introduction of the new sub-range.

Figure 1, Awareness of the introduction of (020) 3 sub-range (prompted)

Base: Adults aged 16+ living in the Greater London area, (Base: Aug '04: 128⁴, Dec '04 – Jan '05: 1,000)



Awareness of the new (020) 3 sub-range found to be stronger amongst the older population and broadsheet readers

- 2.3 Stronger levels of awareness were reported amongst certain segments of the Greater London population. As shown in Figure 2 below, 10% of those adults aged 55 or over were aware of the new (020) 3 sub-range – as were 8% of readers of

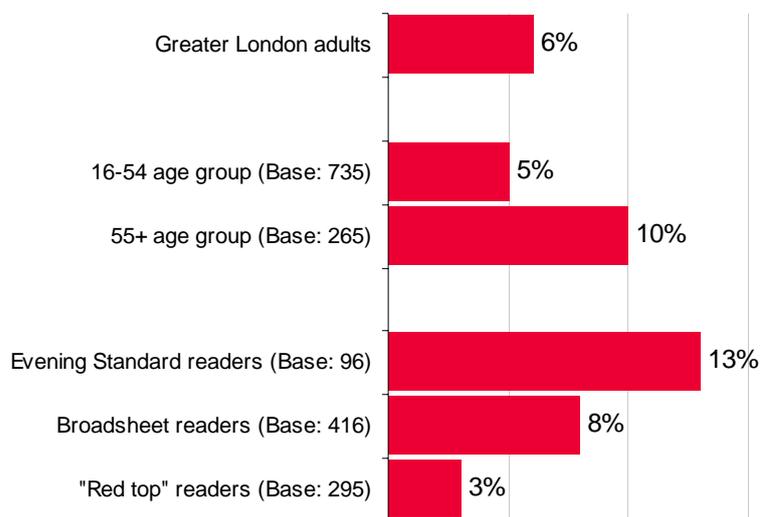
⁴ Note that base sizes are relatively small, so some caution should be applied to findings, and the percentages should be treated as indicative only

broadsheet⁵ newspapers. This may be highlighting a need to focus communication at younger audiences – and ensure that press coverage covers a broad range of different styles of publication (awareness amongst “red top”⁶ newspaper readers was only found to be 3%).

- 2.4 In addition, the heavier coverage of the (020) 3 introduction in the Evening Standard may well have driven the higher awareness amongst its readership (13%) – potentially demonstrating the impact newspapers can have in informing the public of upcoming events.
- 2.5 No variations in awareness levels were apparent by gender, social economic grouping, household income or ethnicity.

Figure 2, Awareness of the introduction of (020) 3 sub-range (prompted)

Base: Adults aged 16+ living in the Greater London area, Dec '04-Jan '05 (Base⁷: 1,000)



Residential consumers' awareness that existing numbers will not have to change

- 2.6 Of those adults who claimed an awareness of the (020) 3 introduction, approximately one half (46%) believed that existing numbers would not need to change – the remainder were either not sure (24%) or were under the misconception that some or all of existing numbers would have to change when (020) 3 is introduced (31%).

⁵ For the purposes of this analysis, “broadsheet readers” have been classified as readers of the Daily Telegraph, The Times, The Guardian, The Independent, The Financial Times, The Sunday Telegraph, The Sunday Times, The Observer and The Independent on Sunday

⁶ For the purposes of this analysis, “red top readers” have been classified as readers of The Sun, The Mirror, The Star, The News of the World and The Sunday Mirror

⁷ Note that base size for Evening Standard readers is relatively small, so some caution should be applied to findings, and the percentages should be treated as indicative only

Section 3

Londoners' perceptions of existing dialling code for London

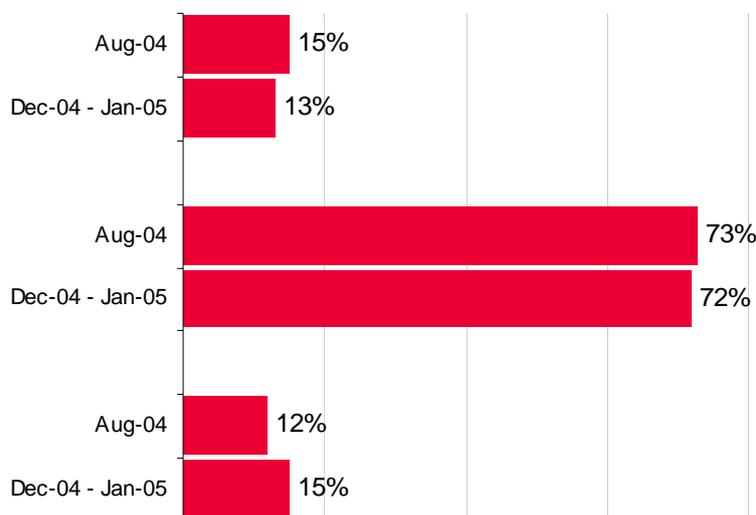
What do residential consumers think the dialling code for London is?

No change in perception of London dialling codes

- 3.1 As well as asking residential consumers whether they were aware of the introduction of (020) 3 London numbers, Ofcom also examined consumer understanding of the London dialling code.
- 3.2 For almost five years Greater London has had one area dialling code – 020. One in eight (13%) of residential consumers in Greater London gave this completely accurate description of the London dialling code unprompted. When mentions of (020) 7 and (020) 8 are also taken into account⁸ almost three-quarters (72%) of adults in Greater London mentioned a code beginning with 020 as the dialling code for London. The results are similar to findings seen in August 2004.

Figure 3, Unprompted perception of what the dialling code for London is

Base: Adults aged 16+ living in the Greater London area, (Base: Aug '04: 128⁹, Dec '04 – Jan '05: 1,000)



Perceptions of the difference between (020) 7 and (020) 8

- 3.3 Two-thirds (69%) of adults in the Greater London area thought that there was a difference between London numbers that begin with a 7 or and 8. Of those believing that there was a difference, the vast majority (91%) felt that the numbers related to

⁸ These figures include some respondents who mentioned a code beginning with 020 and also mentioned another incorrect code.

⁹ Note that base sizes for the Greater London sample in the August 2004 study are relatively small, so some caution should be applied to findings, and the percentages should be treated as indicative only

different parts of London – with two-thirds able to be more specific, stating that 7 is for inner London (69%) and 8 is for outer London (67%).

Do callers omit the dialling code when making calls from one London number to another?

- 3.4 Among those that make calls from fixed phones in London to another fixed line, almost two-thirds (64%) said that they omit the 020 dialling code from the number they are dialling when they do so, with an additional 7% saying that they did so sometimes. This represents an increase on the findings from August 2004 – when one half (51%) said that they omit the 020 dialling code. Ofcom will continue to monitor this, to assess whether this can be considered a real change.

Section 4

UK SMEs understanding of London dialling code

4.1 As individuals within organisations have their own personal understanding of the dialling code for London, Ofcom asked respondents to its SME survey about the format of London dialling codes on business stationery and the way that London dialling codes are programmed into their private business exchanges.

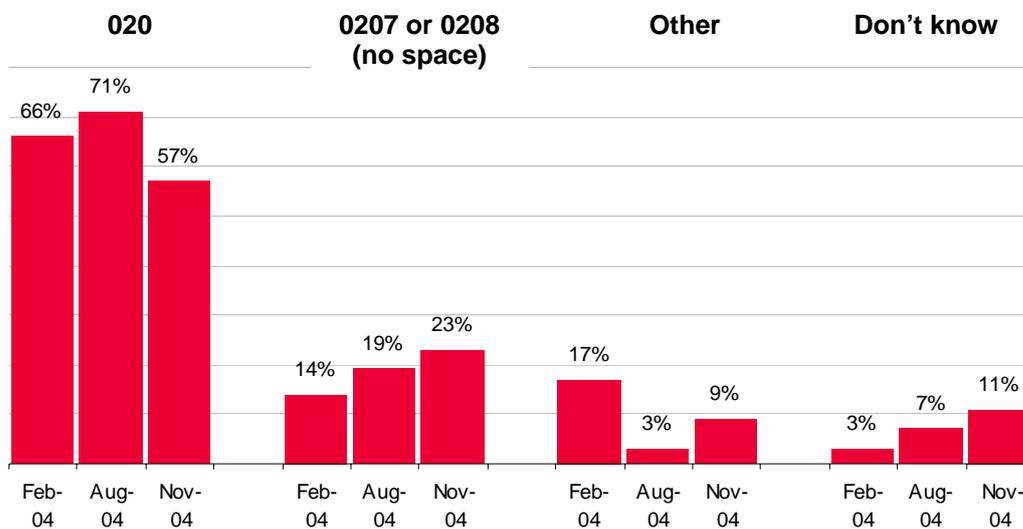
Dialling codes used on business stationery

4.2 To help assess understanding of the London dialling code (020) by businesses, SMEs were asked about the way their telephone number appears in company stationery, business cards or signs.

4.3 The majority of SMEs (57%) with a London dialling code have the correct code printed on company stationery. This represents a fall in the results seen in August 2004 – where 71% were found to be presenting the code correctly. Ofcom will continue to monitor this, to assess whether this can be considered a real change.¹⁰

Figure 4, Format of publicised business telephone numbers

Base: UK SMEs with London dialling code, Feb/Aug/Nov '04 (Base: Feb 04: 102, Aug 04: 96, Nov 04: 96)



Programming of private business exchange (PBX)

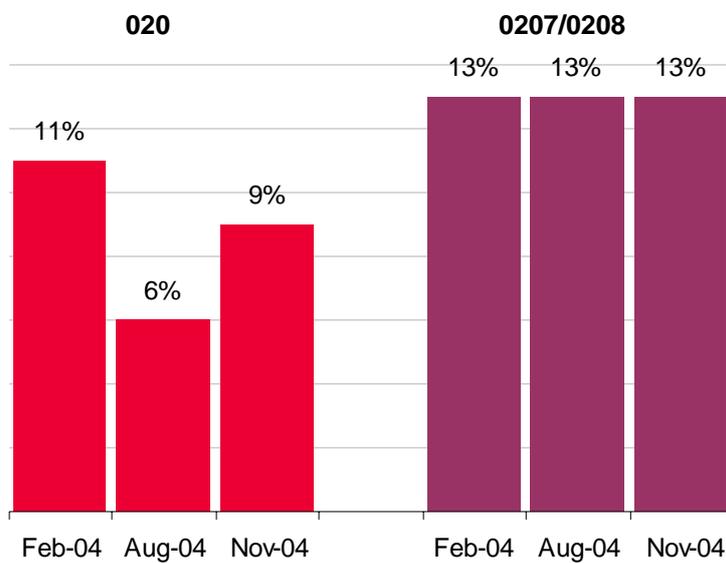
4.4 Businesses with private business exchanges may programme them with dialling codes. If London codes are not programmed in the 020 format, the introduction of (020) 3 numbers could mean that businesses are unable to make or receive calls to or from the new (020) 3 numbers.

¹⁰ Note that base sizes are relatively small, so some caution should be applied to findings, and the percentages should be treated as indicative only (the error margin for these results is approximately 6-10%)

- 4.5 Amongst SMEs with a PBX that is pre-programmed, the majority (63%) of the businesses surveyed did not know how the London code was programmed in their PBX, so the following findings should be treated with caution.
- 4.6 One in ten (9%) of all of the SMEs interviewed (9%) claimed to have programmed the correct 020 code programmed into their PBX. However, a similar proportion (13%) claim to have 0208 and/or 0207 programmed as codes for London – so these businesses would therefore have a problem when (020) 3 is introduced as a new London prefix as their PBX would not recognise this and would reject the call until reprogrammed.

Figure 5, Summary of numbers programmed into PBX

Base: UK SMEs with a PBX, Feb/Aug/Nov '04 (Base: Feb 04: 839, Aug 04: 829, Nov 04: 805)¹¹



¹¹ Note that almost two-thirds of SMEs (63% in November 2004) did not know what London code was programmed into their PBX, so the actual proportions with 020 and 0207/0208 is likely to be significantly higher

Annex 1

Nov 2004 - Jan 2005 Questionnaire

Residential questions

Question 1. *Can you tell me what you think the telephone dialling code (i.e. the area code) for fixed line phones in the London area is?*

Question 2. *How often do you make calls to fixed line phones in London?*

Question 3a. *The dialling code for London is 020, then, after this prefix, telephone numbers begin with a 7 or an 8. Do you think there is a difference between London numbers that begin with a 7 and London numbers that begin with an 8?*

Question 3b. *What do you think is the difference between London numbers that begin with a 7 and London numbers that begin with an 8?*

Question 4. *Thinking about the calls you make to London numbers, are any of these made from another fixed line in London? (i.e. with a London dialling code)*

Question 5. *When you make a call to a fixed line phone in London from another London fixed line phone do you usually dial the 020 prefix first or do you only dial the 8 digit telephone number that starts with a 7 or an 8?*

Question 6. *From summer 2005 an extra phone number sub-range for use across Greater London – (020) 3 – will be introduced. Before now were you aware of the new (020) 3 sub-range?*

Question 7. *I am now going to read out three statements about the introduction of the new (020) 3 sub-range of London telephone numbers. Please tell me which one you think is correct.*

When the (020) 3 sub-range is introduced NO existing London telephone numbers will have to change

When the (020) 3 sub-range is introduced SOME existing London telephone numbers will have to change

When the (020) 3 sub-range is introduced ALL existing London telephone numbers will have to change

SME questions

Question 1. *Thinking about your company's main telephone number, please can you read out how this appears on your company stationery, business cards or signs. Please make sure to include any spaces between the digits. (unprompted)*

Question 2. *Now thinking about your company's PBX (private business exchange), can you tell me what dialling code is currently programmed in for calls to and from London? (unprompted)*