



London telephone numbers

New sub-range for London: (020) 3

Research report, November 2004

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Section 1

Introduction

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

- 1.1 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 in August 2004.
- 1.2 The residential survey was conducted for Ofcom by ICM amongst 1035 GB adults and the SME survey was conducted by Continental Research amongst 829 SMEs during August 2004¹. The report has been prepared by Ofcom², based on the results provided by ICM Research and Continental Research.
- 1.3 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
- 1.4 A copy of the questions used is attached in Annex A.

¹ ICM Research interviewed a random selection of 1035 adults aged 16+ by telephone between 13-15 August 2004. Interviews were conducted across the country and the results have been weighted to the profile of all adults.

² Because the survey was conducted amongst a sample of adults, rather than the whole population, the data may be subject to a small margin of error. The error margin for the total sample of 1035 consumers is about 2-3% and 2-4% for the sample of 829 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 of 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

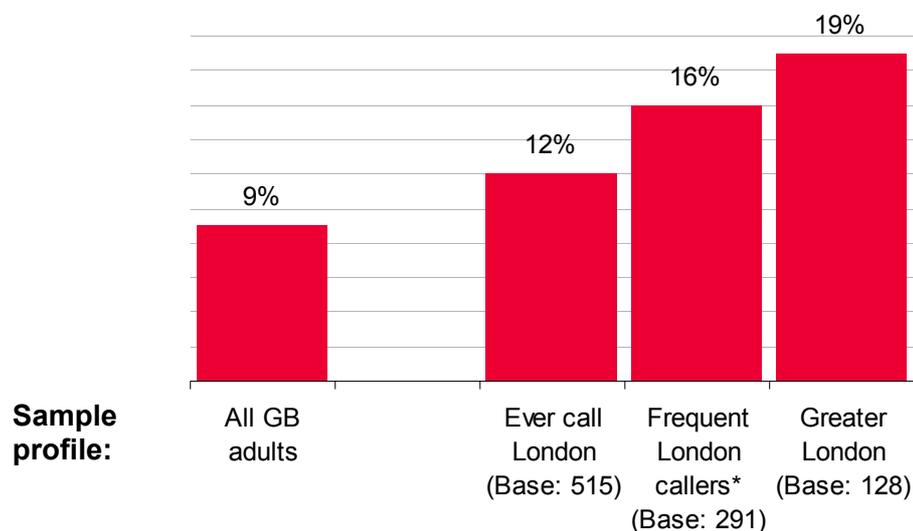
Awareness of the introduction of the (020) 3 sub-range

1 in 10 are aware of the new 020 3 sub-range

- 2.1 In August 2004, 9% of GB adults were aware that the (020) 3 sub-range will be introduced. This rises to 12% among those who ever call London numbers and 16% among those who call London most frequently (at least weekly or most weeks).
- 2.2 In the Greater London region awareness stood at 1 in 5 (19%).

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

Base: GB adults aged 16+, August 2004 (Base: 1035)



* Residential consumers that call fixed lines in London at least most weeks.

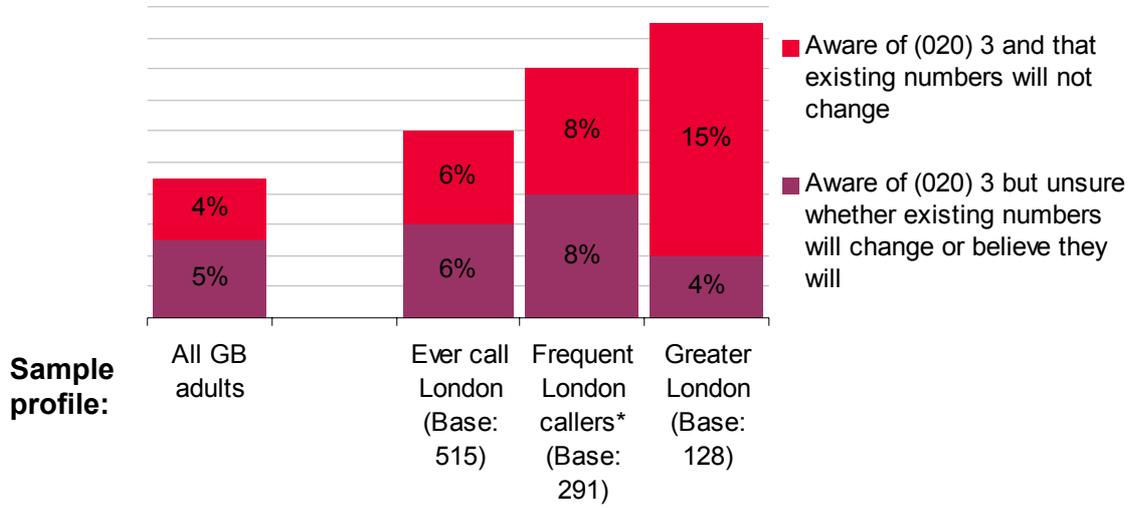
Awareness that existing numbers will not have to change

- 2.3 In total 4% of GB adults were aware that (020) 3 is going to be introduced **and** (when prompted) knew that existing numbers will not change – the remaining 5% who were aware of the introduction either were not sure or were under the misconception that some or all existing numbers would have to change when (020) 3 is introduced (figure 2).
- 2.4 The proportion who were aware of the new numbers **and** (after prompting) that existing numbers do not have to change was 15% in Greater London – meaning that 4% of Londoners are aware of the impending introduction of (020) 3, but have not yet understood that existing numbers will not have to change.³

³ Note that sample size in Greater London was 128 so this number should be treated with some caution. The error margin on a sample of 128 is about 2-9%

Figure 2, Awareness of the introduction of (020) 3 sub-range and that existing numbers will not change (prompted)

Base: GB adults aged 16+, August 2004 (Base: 1035)



* Residential consumers that call fixed lines in London at least most weeks.

Section 3

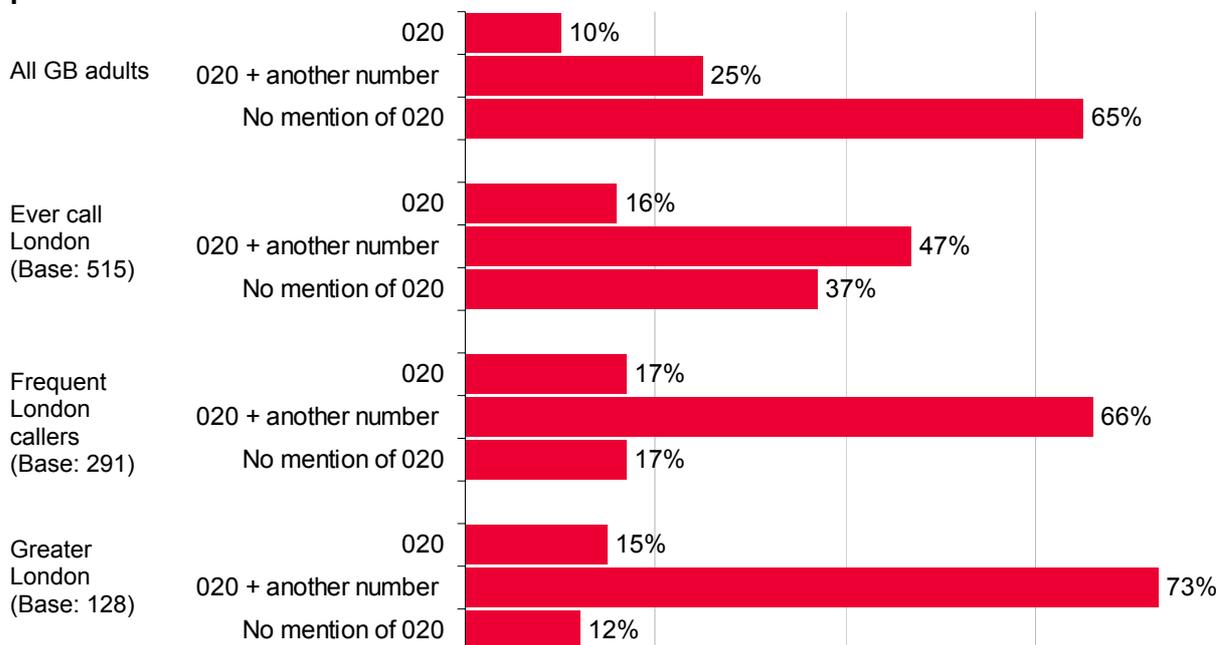
Perceptions of existing dialling code for London

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

- 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. The majority of residential consumers (65%) do not know what the dialling code for London is or thought it began with something other than 020.
- 3.3 Strictly speaking the dialling code for London is 020 – with no other numbers following – 10% gave this completely accurate description of the London dialling code unprompted. When mentions of (020) 7 and (020) 8 are also taken into account⁴ over a third (35%) of GB adults mentioned a code beginning with 020 as the dialling code for London. The results are similar to findings in March 2004.

Figure 3, Unprompted perception of what the dialling code for London is
Base: GB adults aged 16+, August 2004 (Base: 1035)

Sample profile:



- 3.4 Unsurprisingly, awareness that the London dialling code begins with 020 was higher among those living in Greater London and those who call fixed phone numbers in London most frequently.

⁴ These figures include some respondents who mentioned a code beginning with 020 and also mentioned another incorrect code.

Perceptions of the difference between 020 7 and 020 8

- 3.5 Half (48%) of GB adults thought that there was some sort of geographic difference between (020) 7 and (020) 8. Some of these were more precise in describing their understanding - a quarter (24%) thought that (020) 7 numbers were located in inner London and (020) 8 numbers in outer London.
- 3.6 These perceptions were much stronger among those who ever call London with 74% thinking that there was some sort of geographic difference and half (52%) being more precise, saying that they thought that (020) 7 numbers were located in inner London and (020) 8 numbers in outer London.

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

- 3.7 Among those that make calls from fixed phones in London to another fixed line, almost half (47%) 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.⁵

⁵ Small base size, apply caution and treat as indicative only

Section 4

SME 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.

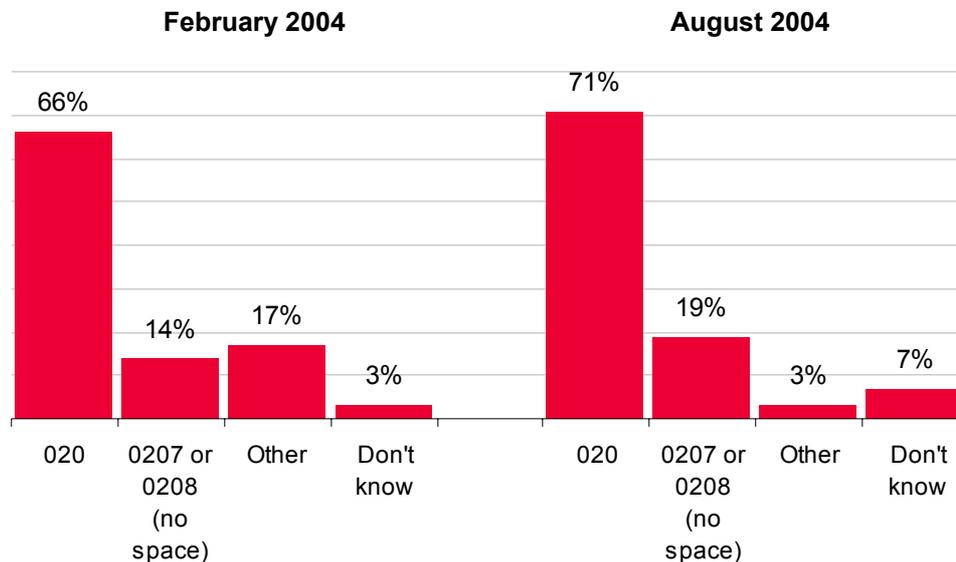
Dialling codes used on business stationery

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 (71%) with a London dialling code have the correct code printed on company stationery. There was no significant change in the way London SMEs presented their telephone dialling codes on their stationery between February and August 2004.⁶

Figure 4, Format of publicised business telephone numbers

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



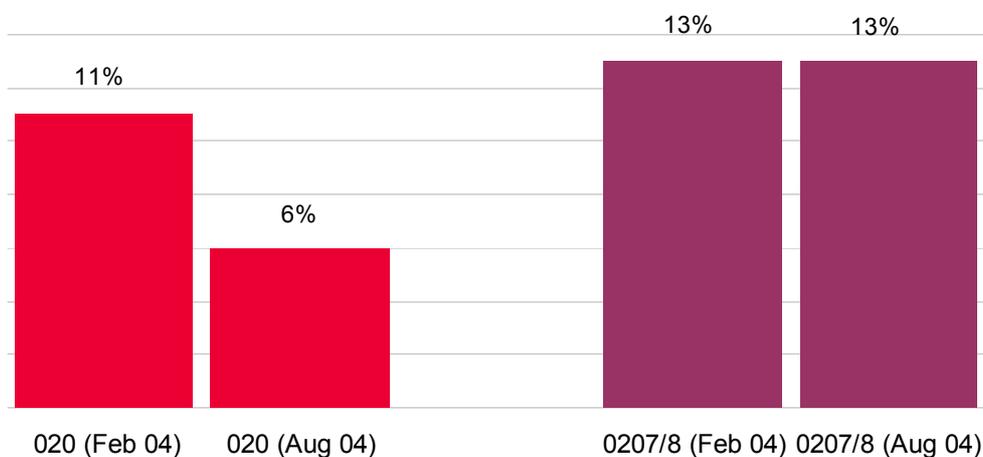
⁶ Note that base sizes are small, so some caution should be applied to findings, and the percentages should be treated as indicative only.

Programming of private business exchange (PBX)

- 4.4 Businesses with private business exchanges may programme it 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.
- 4.5 Amongst SMEs with a PBX that is pre-programmed, **the majority (69%) 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 1 in 10 SMEs (11%) claim 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 be at a disadvantage when (020) 3 is introduced as a new London prefix as their PBX would not recognise this and would reject the call.
- 4.7 The proportion of businesses that have 020 programmed into their PBX appears to have fallen slightly between February and May 2004. Ofcom will continue to monitor this, to assess whether this can be considered a real change.

Summary of numbers programmed into PBX

Base: UK SMEs with a PBX, Feb – Aug '04 (Base: Feb 04: 839, Aug 04: 829)⁷



⁷ Note that nearly 70% of SMEs 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

August 2004 Questionnaire

Residential questions

- Q1. Can you tell me what you think the telephone dialling code for fixed line phones in the London area is?
- Q2. How often do you make calls to fixed line phones in London?
- Q3. The dialling code for London is 020, then, after this prefix, telephone numbers begin with a 7 or an 8. What do you think is the difference between London numbers that begin with a 7 and London numbers that begin with an 8?
- Q4. 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)
- Q5. 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?
- Q6. 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?
- Q7. 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

- Q1. 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)
- Q2. 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)