



Numbering Review

Report of findings

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Section 1

Introduction

Background & Objectives

- 1.1 Ofcom's consultation on the UK telephone numbering plan contains several proposed changes to the current number ranges. These include a new range that begins with 03 and signifies 'countrywide' numbers, a range that begins with 06 and signifies personalised numbers, as well as additional changes to the current 08 and 09 ranges.
- 1.2 To increase awareness and understanding of the number ranges among consumers, Ofcom has also developed a graphic and a short description for each range.
- 1.3 Ofcom wished to undertake consumer research to
 - Ensure that the descriptions and associated graphics are straightforward and clearly understood
 - Assess responses to the proposed revisions to the 03, 08 and 09 number ranges.

Approach

- 1.4 A total of 8 focus groups were conducted in London (6) and Swansea (2).
- 1.5 London groups were split according to socio economic grade and technical knowledge (based on mobile and PC usage), as follows . . .

PC /Mobile Phone Users		Non PC/Non Mobile Phone Users	
B C1	C2 D E	B C1	C2 D E
Mix of ages	Mix of ages	Mix of ages	Mix of ages
2 groups	1 group	1 group	2 groups

- 1.6 Swansea groups included one group of PC / mobile users and one group of non PC / mobile users, with a mix of socio-economic grades and age in each group.
- 1.7 Groups were conducted in London on 25th and 26th April and in Swansea on 8th May. All groups followed an agreed discussion guide, which is appended along with the stimulus material used.

Section 2

Executive Summary

- 2.1 Responses to the graphics and descriptions of the proposed number ranges were consistent across the different audience types.
- 2.2 Numbers beginning with 07, 080 and 09 were familiar to the vast majority of respondents and the graphic and descriptions of each of these number ranges were clearly understood by all.
- 2.3 The 04 / 05 graphic and description were thought to be self explanatory. Similarly, the 06 graphic and description worked well in combination to communicate personalised numbers, (although the concept of personalised numbers was not widely understood).
- 2.4 The 03 graphic and description communicated UK numbers, though there was some confusion whether 03 numbers related to calls made from within the UK or from abroad. The description “Countrywide” was considered somewhat limiting and “UK-wide” was suggested as an alternative.
- 2.5 The 01 / 02 graphic signified landlines to most, but there was uncertainty about what the 01 and 02 numbers referred to. The description “Geographic numbers” was generally unfamiliar and did not combine well with the graphic. The term “UK area codes” was considered a better alternative.
- 2.6 The 08 graphic and description performed the least well and both were thought to be in need of further development. The graphic most commonly signified directory enquiries but was generally not understood. Similarly, the description “chargeable services” was also not understood and did not add anything to the graphic. The term “business service rates” was considered a better alternative.
- 2.7 Response to the 03 range concept was generally very positive once the idea of revenue sharing within the 08 range had been explained.
- 2.8 Of the proposed changes to the 08 range, the option that included the introduction of the 03 range appealed most.
- 2.9 Opinions were more divided over the options within the 09 range, though there was general consensus that the format of 3 of the 4 proposed options (service related, price related and a hybrid of these) was clear and straightforward. Overall, options that distinguished price were marginally favoured over options that indicated different services, and the hybrid option appealed most by offering something of both.

Conclusions / Recommendations

- 2.10 Most of the proposed graphics and descriptions are working well – just the graphic and description for the 08 range, and the description for the 01 / 02 and 03 ranges would benefit from further development.
- 2.11 The graphic and description for the 03 range works well to convey “the UK” but does not explain the similarities and differences to the 08 range. This is likely to be too complex to achieve in a single graphic and description, though it may be appropriate to revisit this once the 03 range is introduced.

- 2.12 The 03 range was well liked once the concept of revenue sharing within the 08 range was understood, and this extension to the 08 range was the approach that appealed most. However, as revenue sharing is largely unknown, clear communication of the 03 range will be needed if it is to avoid being seen as just another range.
- 2.13 With the exception of the unstructured option, all the other proposed options in the 09 range are possible routes – the evidence points to the hybrid option, with its emphasis on price and the identification of adult entertainment, as the one to continue with.

Section 3

Graphics and Short Descriptions

3.1 01 / 02 Range



- For the majority, the graphic communicated land lines.
- However, there was widespread uncertainty about what the numbers 01 and 02 referred to – only a minority in Swansea and London suggested they signified area codes.
- The confusion appeared to be related to the fact that most respondents when giving out their landline number would just mention the number and not include the area code. As a result, they did not see their numbers as beginning with 01 and 02.
- The “Geographic numbers” description was not a familiar term to any respondent, and was only understood by those few who understood the graphic. It was clear that this description did not complement or provide any explanation to the graphic.
- Overall, respondents felt that “UK area codes” would work better than “Geographic numbers”
 - *“We’re used to talking about area codes, even the youngsters are familiar with these” (Swansea, C1, 55+).*

3.2 03 Range



- The graphic communicated “the UK” to most respondents, but there was some uncertainty whether this meant calls made from within the UK or calls made to the UK from abroad
 - *“I thought it meant that if you were ringing from abroad, you would need to ring 03 for the UK” (London, C2, 35-44).*
- The description was felt to complement the graphic but not add anything in terms of explanation. Several thought that the term “UK-wide” would work better than “Countrywide”

- *“I don’t know why, countrywide sounds smaller, as if it just related to one country, whereas the UK includes all the countries” (Swansea, C2, 35-44).*

3.3 04 / 05 Range



- Clearly understood by all.

3.4 06 Range



Personalised numbers

- The graphic was widely recognised as a fingerprint, though the implications of this were generally not clear
 - “Something to do with identity, or is it the police?” (London, C2, 25-34)
 - “Keypad security using fingerprints?” (Swansea, C2, 25-34).
- The description was broadly understood, though the precise details of how these numbers worked were not clear.
- In combination, the graphic and description seen as working well
 - “It makes sense when you see the description with the picture” (Swansea, B, 55+).

3.5 07 Range



Mobile numbers

- 07 numbers were recognised by the vast majority, and both graphic and description were clearly understood by all.

3.6 080 Range



Freephone

- The 0800 number was well known, and both the graphic and the description were clearly understood by all.

3.7 08 Range



Chargeable services

- The graphic was not clear to the vast majority
 - “What are those round things?” (Swansea, D, 55+)
 - “Looks like some sort of phone book, is it directory enquiries?” (London, C2, 55+).
- Similarly most respondents did not understand the description. Several suggested that it might refer to directory enquiries or yellow pages, and only a small minority correctly suggested it referred to 0845 numbers or similar.
- Overall, it was felt that both the graphic and the description were in need of further development if this 08 range was to be communicated effectively.
- Suggestions for the graphic included clearly identifiable coins, representing the different price tariffs, for example 5p (local rate), 10p (national rate).
- Several alternative descriptions were assessed in Swansea ('pay-for-service', 'basic rate', 'basic rate services', 'business services', 'business service rates', 'business services (basic rates)', 'business services' basic rates'). Of these the term 'business service rates' was considered the most straightforward and appropriate.

3.8 09 Range



Premium rate services

- 09 numbers were recognised by the vast majority, and both the graphic and the description were clearly understood by all.

Section 4

03 / 08 / 09 Ranges

4.1 03 Range

- With just one exception, none of the respondents had heard that companies can generate revenue from 08xx telephone numbers.
- Once revenue sharing and the rationale for the 03 range had been explained, responses were generally very positive
 - *“I had no idea companies could do that, I like the idea of numbers that you know companies are not making money out of you” (Swansea, C2, 45-54)*
 - *“It seems a good idea, I’ll feel more comfortable calling those numbers than I do calling the 08 ones at the moment” (London, C2, 35-44)*
 - *“If it makes it simpler, then I’m all for it – less numbers doing different things is what I’d like” (London, D, 55+).*
- Including the 03 range into different payment options was also well received
 - *“That will be really good, I usually call those numbers from work, but if they’re included then I’d use my mobile” (London, C2, 25-34).*
- For a minority, however, this new range had little appeal . . .
 - *“If I’ve got to call those numbers I just get on with it. Bringing a new range won’t make me call them any differently, it’s just something you’ve got to do” (London, C1, 25-34)*
 - *“There’s no difference to me in how much it costs so why should I care?” (Swansea, C1, 45-54).*

4.2 08 Range

- Awareness and understanding of numbers within the 08 range was very varied. About half the sample were familiar with 0845 numbers, but only a few knew the associated costs. Awareness of other 08 numbers, including 0870, was extremely limited.
- However, when presented with the current 08 range, respondents generally felt the current approach was relatively straightforward
 - *“It looks pretty easy to me, but then it’s a different matter when it’s sitting in front of you – I doubt I’ll remember this afterwards” (London, C2, 55+).*
- Responses to the 3 proposed options were largely consistent across the different groups.

4.2.1 08 Range – Option A

Cost of call	Current number type	Numbers used in the long-term
Free	0800, 0808	Any 080
Up to 5p per minute	0844	0844, plus 0843 (then plus 0842)
Standard local call retail price (calls from BT lines)	0845	0845, plus 0846 (then plus 0847)
Standard national call retail price (calls from BT lines)	0870	0870, plus 0872 (then plus 0874)
Up to 10p per minute	0871	0871, plus 0873 (then plus 0875)

- Rated 2nd of the three options.
- Generally considered to have a degree of logic and to be relatively straightforward to understand.
- However, there were concerns about the amount of numbers within the range and the consequent difficulty in understanding the differences between them
 - *“It seems clear when we’re looking at it now, but we won’t have a clue if all these numbers come out. It’s not making it easier for us” (Swansea, C2, 45-54).*

4.2.2 08 Range – Option B

Cost of call	Current number type	Numbers used in the long-term
Free	0800, 0808	Any 080
Up to 5p per minute	0844	085 plus 0844
Standard local call retail price (calls from BT lines)	0845	086 plus 0845
Standard national call retail price (calls from BT lines)	0870	088 plus 0870
Up to 10p per minute	0871	089 plus 0871

- Rated last of the three options.
- Limited appeal due to the perceived lack of logic and likely confusion when the old range is combined with the new range.

- *"Fewer numbers but they don't relate to the old numbers" (London)*

4.2.3 08 Range – Option C

Cost of call	Current number type	Numbers used in the long-term
Free	0800, 0808	Any 080
Up to 5p per minute	0844	084
Standard local call retail price (calls from BT lines)	0845	034
Standard national call retail price (calls from BT lines)	0870	037
Up to 10p per minute	0871	087

- Rated 1st of the three options.
- Considered the most straightforward by the majority
 - *"There are just less numbers to remember so that's a start" (London, C2, 55+)*
 - *"Once you've got the idea of the 03 range, then this will be easy" (London, C1, 35-44).*
- Some had concerns that the 03 range would just become as confusing as the current 08 range
 - *"It's just another opportunity to create a whole load of numbers that we don't understand – I'd stick with what we've got" (Swansea, C2, 25-34).*

4.3 09 Range

- Although over half the sample had called a 09 number at some point, the 09 range was viewed in a very negative light
 - *“Expensive and dodgy, full of scams” (London, D, 55+)*
 - *“Really expensive, that’s how they make their money for these quiz shows” (Swansea, C1, 45-54)*
 - *“If you ring some of these competitions, you get charged even if you don’t get through – it’s a complete scam” (Swansea, C2, 35-44).*
- It was clear that numbers within the 09 range were seen as all the same, and none were aware of different numbers and their associated costs within the current structure.
- Responses to the current range was lukewarm - most respondents felt it was neither clear nor unclear
 - *“It doesn’t look too bad when you see it in front of you, but I’d never remember any of this if I wasn’t looking at it” (London, C1, 55+).*
- None of the respondents currently barred 09 calls at home, though several were aware that they were barred at work. There was general consensus that call-barring was an important facility for families with children.
- Responses to the proposed 4 options were largely consistent across the different groups. The clarity of options A, B and C appealed across the groups, but overall there was no strong preference for any one option.

4.3.1 09 Range – Option A (Service related)

Current number type	Numbers used in the long-term	Cost of call / type of service
0900 / 0901	090	Legacy 090 services
0904 / 0905 / 0906 / 0911	091	Legacy 091 services
0907	092	Charitable contributions up to a certain price
0908 / 0909	093	Competition and voting lines up to a certain price
	094	
	095 / 096	Business services up to a certain price
	097	
	098	Sexual entertainment services up to a certain price

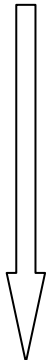
- Rated 3rd out of the four options.
- The ability to identify different services appealed to many because
 - It demonstrated that the 09 range included services beyond just competition and adult entertainment
 - Certain services rather than the whole range could be barred
 - Telephone calls could be easily monitored

“I can see the advantage if you have kids as you can tell which service they have been calling” (London, C2, 18-24).
- However, there were several others who did not see any benefit from this service-related approach . . .
 - They felt it is was only of benefit to those who might wish to bar particular services
 - They would know which service they were calling in any case

“I can see it could be useful if you’ve got children and wish to bar certain services, but realistically you’ll probably bar all of them anyway, wouldn’t you?” (Swansea, C1, 25-34)

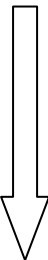
“It looks simple, but if you’re calling a 09 number you’ll know what service you’re ringing anyway, so what’s the point?” (London, C2, 18-24).

4.3.1 09 Range – Option B (Price related)

Current number type	Numbers used in the long-term	Cost of call / type of service
0900 / 0901	090	Least expensive  Most expensive
0904 / 0905 / 0906 / 0911	091	
0907	092	
0908 / 0909	093	
	094	
	095	
	096	
	097	
	098	

- Rated 2nd out of the 4 options.
- Arrangement by price appealed right across the sample
 - *“It’s exactly what you’re after – you want to have some idea of the cost of the call more than anything else” (Swansea, D, 45-54)*
 - *“I like this approach because you could bar call costs above a certain amount” (London, C1, 35-44).*
- Several thought, however, that this approach was only useful if the price parameters were well known
 - *“Not much point in this unless you know what you’re starting from” (London, C1, 55+).*

4.3.1 09 Range – Option C (Hybrid Service / Price)

Current number type	Numbers used in the long-term	Cost of call / type of service	
0900 / 0901	090	Least expensive  Most expensive	
0904 / 0905 / 0906 / 0911	091		
0907	092		
0908 / 0909	093		
	094		
	095		
	096		
	097		
	098		Sexual entertainment services

- Rated 1st out of the 4 options.
- The added level of detail of the 098 category appealed to all those in favour of a price related approach
 - *“This is the one, you get a sense of price but you can still single out that one category” (Swansea, C2, 35-44).*
- Those that favoured the service-related approach felt this option remained too price focused
 - *“Can’t they mix them together a bit more so we can see some more services?” (London, C2, 55+).*

4.3.2 09 Range – Option D (No structure)

Numbers used in the long-term	Cost of call / type of service
090, 091 (then 092, 093 etc)	Any form of content Any tariff (up to a tariff ceiling - currently £1.50 per minute or per call fixed fee)

- Rated 4th out of the 4 options.
- Failed to appeal to the majority due its lack of structure and information, when compared to the previous options.
- The few supporters of this option claimed they would not call 09 numbers so this option appeared to them to be the easiest to administrate
 - *“I don’t care about 09 numbers, as far as I’m concerned it can be a free for all” (Swansea, B, 55+).*

Appendix

**Telephone Numbering
Assessment of Proposed Ranges
Discussion Guide
April 2006**

1.	<p>Moderator Introduction</p> <p>Who we are, our independence and confidentiality.</p> <p>Explain the group is sponsored by Ofcom, the regulator for the telecoms industry, and we're going to be talking about telephone numbers and number ranges. Explain that Ofcom is responsible for the provision of telephone numbers, and, as there is increasing demand for new numbers and new services, there is a need to ensure the numbering framework meets this demand. Ofcom is not proposing changes to people's home numbers but wants to make it easier for people to know from the number dialled what price and service is involved. Today, we're going to show some ideas for how telephone numbers could look in the future and would like their opinions.</p> <p>We're going to ask them to write down some answers as well as discuss things. Reassure that there is no right or wrong, not a test of technical knowledge, just an opportunity for them to tell us what they think.</p>
2.	<p>Respondent Introduction</p> <p>Ask respondents to introduce themselves and give a brief summary of their telephone usage, i.e. platform (fixed, mobile), usage, payment model (subscription, pre-paid).</p>
3.	<p>Assessment of Symbols / Descriptions</p> <p>Hand out write down exercises one after the other without discussion in between. (WD1 = Symbols; WD2 = Descriptions). Rotate order of write downs across the groups, i.e. 3 groups are shown WD1 first; 3 groups shown WD2 first.</p> <p>Review responses to both write downs on a flipchart, and assess levels of understanding / confusion with the symbol and description for each number range.</p> <p>Introduce alternative ideas for symbols and/or descriptions and discuss merits of each.</p>
4.	<p>Focus on new 03 range:</p> <p>Explain in more detail the concept behind 03 range – i.e. a new range that should be used instead of some 08 numbers</p> <ul style="list-style-type: none"> – Offers exactly the same rate as a geographical number – Can be linked in with landline and mobile packages (free minutes, etc) – Will be used to signify public service numbers – possible range within a range, e.g. -35 is local government, 033 is health service, etc – The safe and trustworthy option <p>Assess responses to the concept: strengths, weaknesses, likelihood to use, etc</p>

Focus on 08 / 09 range

Reiterate that within the 08 and 09 ranges, there is an increasing demand for new numbers / services and in order to avoid some numbers running out, there is a need to make changes, as well as make things easier and clearer overall.

Explain that we're going to show how things currently work, and then ask respondents to comment on some other options. Remind respondents that current numbers will not change – all the options are in addition to what is currently available. Also that there is a cost associated with changing numbers, so some numbers will stay the same for some time – there is no magic option, etc.

Rotate order of 08/09 presentation across the groups.

08 Range:

5. **Ask respondents which 08 numbers they are familiar with and the associated costs. Hand out WD3 (08 range) and ask respondents to comment on current system.**

Hand out all 3 options consecutively – rotate order. For each option, check understanding with respondents and clarify any questions. Ask respondents to fill out the write downs individually and without comment. Repeat for each option in selected range.

Review scores and comments for each option. Complete ranking.

09 Range:











Ask respondents which 09 numbers they are familiar with and the associated costs. Hand out WD4 (09 range) and rate current system.

Hand out all 4 options consecutively (rotate order), check understanding and clarify questions before respondents complete each write down (e.g. 09x allows for consumers to ban calls to certain types of numbers, etc)

Review scores and comments for each option. Complete ranking.

-
6. Review, thank and close.

Write Down 1:

Symbol	Description
 	
	
 	
	
	
	
	
	

Write Down 2:

Example numbers	Description
	Geographic numbers
	Countrywide numbers
	Personalised numbers
	Mobile numbers
	Freephone
	Chargeable services
	Premium rate services

WD3 – Current 08 Range:

Cost of call	Current number type
Free	0800, 0808
Up to 5p per minute	0844
Standard local call retail price (calls from BT lines)	0845
Standard national call retail price (calls from BT lines)	0870
Up to 10p per minute	0871

Please rate this current system in terms of clarity / ease of understanding on a scale of 0-10, where 0=totally unclear, and 10=crystal clear.

Score: _____

Comments:

Cost of call	Current number type	Numbers used in the long-term
Free	0800, 0808	Any 080
Up to 5p per minute	0844	0844, plus 0843 (then plus 0842)
Standard local call retail price (calls from BT lines)	0845	0845, plus 0846 (then plus 0847)
Standard national call retail price (calls from BT lines)	0870	0870, plus 0872 (then plus 0874)
Up to 10p per minute	0871	0871, plus 0873 (then plus 0875)

Please rate this current system in terms of clarity / ease of understanding on a scale of 0-10, where 0=totally unclear, and 10=crystal clear.

Score: _____

Please rate this current system in terms of overall preference, on a scale of 0-10, where 0=I don't like it, and 10=I like it very much

Score: _____

Comments:

Cost of call	Current number type	Numbers used in the long-term
Free	0800, 0808	Any 080
Up to 5p per minute	0844	085 plus 0844
Standard local call retail price (calls from BT lines)	0845	086 plus 0845
Standard national call retail price (calls from BT lines)	0870	088 plus 0870
Up to 10p per minute	0871	089 plus 0871

Please rate this current system in terms of clarity / ease of understanding on a scale of 0-10, where 0=totally unclear, and 10=crystal clear.

Score: _____

Please rate this current system in terms of overall preference, on a scale of 0-10, where 0=I don't like it, and 10=I like it very much

Score: _____

Comments:

WD3 – C

Cost of call	Current number type	Numbers used in the long-term
Free	0800, 0808	Any 080
Up to 5p per minute	0844	084
Standard local call retail price (calls from BT lines)	0845	034
Standard national call retail price (calls from BT lines)	0870	037
Up to 10p per minute	0871	087

Please rate this current system in terms of clarity / ease of understanding on a scale of 0-10, where 0=totally unclear, and 10=crystal clear.

Score: _____

Please rate this current system in terms of overall preference, on a scale of 0-10, where 0=I don't like it, and 10=I like it very much

Score: _____

Comments:

WD4 – Current 09 Range:

Current number type	Cost of call / type of service
0900 / 0901	<ul style="list-style-type: none">• up to and including 60 pence per minute with total call cost not greater than £5; or• fixed fee up to £1 per call
0904 / 0905 / 0906 / 0911	<ul style="list-style-type: none">• £1.50 per minute; or• fixed fee up to £1.50 per call
0907	pay for product over £1 in total
0908 / 0909	sexual entertainment services <ul style="list-style-type: none">• up to £1.50 per minute• £1.50 fixed fee per call

Please rate this current system in terms of clarity / ease of understanding on a scale of 0-10, where 0=totally unclear, and 10=crystal clear.

Score: _____

Comments:

WD4 – A: Service related

Current number type	Numbers used in the long-term	Cost of call / type of service
0900 / 0901	090	Legacy 090 services*
0904 / 0905 / 0906 / 0911	091	Legacy 091 services*
0907	092	Charitable contributions up to a certain price
0908 / 0909	093	Competition and voting lines up to a certain price
	094	
	095 / 096	Business services up to a certain price
	097	
	098	Sexual entertainment services up to a certain price

* these would transfer to the other number types over time

Please rate this current system in terms of clarity / ease of understanding on a scale of 0-10, where 0=totally unclear, and 10=crystal clear.

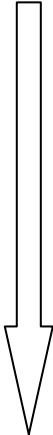
Score: _____

Please rate this current system in terms of overall preference, on a scale of 0-10, where 0=I don't like, and 10=I like it very much

Score: _____

Comments:

WD4 – B: Price related

Current number type	Numbers used in the long-term	Cost of call / type of service
0900 / 0901	090	Least expensive
0904 / 0905 / 0906 / 0911	091	
0907	092	
0908 / 0909	093	
	094	
	095	
	096	
	097	
	098	

Please rate this current system in terms of clarity / ease of understanding on a scale of 0-10, where 0=totally unclear, and 10=crystal clear.

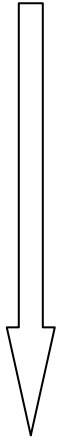
Score: _____

Please rate this current system in terms of overall preference, on a scale of 0-10, where 0=I don't like it, and 10=I like it very much

Score: _____

Comments:

WD4 – C: Hybrid: Service & Price related

Current number type	Numbers used in the long-term	Cost of call / type of service
0900 / 0901	090	Least expensive
0904 / 0905 / 0906 / 0911	091	
0907	092	
0908 / 0909	093	
	094	
	095	
	096	
	097	
	098	Sexual entertainment services

Please rate this current system in terms of clarity / ease of understanding on a scale of 0-10, where 0=totally unclear, and 10=crystal clear.

Score: _____

Please rate this current system in terms of overall preference, on a scale of 0-10, where 0=I don't like it, and 10=I like it very much

Score: _____

Comments:

WD4 – D: No structure

Numbers used in the long-term	Cost of call / type of service
090, 091 (then 092, 093 etc)	Any form of content Any tariff (up to a tariff ceiling - currently £1.50 per minute or per call fixed fee)

Please rate this current system in terms of clarity / ease of understanding on a scale of 0-10, where 0=totally unclear, and 10=crystal clear.

Score: _____

Please rate this current system in terms of overall preference, on a scale of 0-10, where 0=I don't like it, and 10=I like it very much

Score: _____

Comments:
