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GEOGRAPHIC NUMBERING

SUMMARY REPORT OF FINDINGS

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Section 1

Introduction

1.1 Introduction:

Demand from industry for geographic telephone numbers has meant that that some areas in the UK could run out of number blocks under the current system. For the purposes of this research, Ofcom has identified two possible options for resolving the shortfall:

- **Overlay code:** Introducing a second area code on top of the same area of the original code. Local dialling, the facility that enables local numbers to be dialled without the area code from local fixed-line phones, would be withdrawn in the area concerned.
- **Number change:** Increasing numbers by changing to a new shorter area code and adding digit(s) to make a longer local number.

These options have different implications for users. With an overlay code, there is no change of telephone number but people will have to get used to two area codes for the same area and always include an area code when dialling within the area. With a number change, dialling behaviour remains the same but people have to change their numbers incurring costs (particularly for local businesses) in terms of changing numbers that are featured in signage, stationery and advertising.

In addition to the above options, Ofcom also identified a third option, to close the local dialling facility, which would delay introducing an overlay code for over 10 years and in some cases for even 20 years. This is because closing local dialling allows local numbers beginning with the digits '0' and '1' to be used.

Ofcom wished to gather feedback about the current system and the potential changes from fixed line users in affected areas among both residential consumers and small business owners.

1.2 Objectives:

The specific objectives of the research were to:

- Assess attitudes towards the current numbering system, in particular numbers with geographic significance
- Understand current usage of, and assess attitudes towards, local dialling
- Identify typical dialling habits of residential consumers and SMEs
- Assess responses to the two options for creating more numbers
- Understand how best to communicate either of the possible changes to the numbering system.

1.3 Method and Sample

12 x 1 hour focus groups were conducted – eight with residential fixed-line users, four with businesses – in four locations across England (Stoke on Trent, Milton Keynes, Brighton and Hove and Bradford).

Locations were selected because they represented some of the area codes that could run out of number blocks within the next ten years.

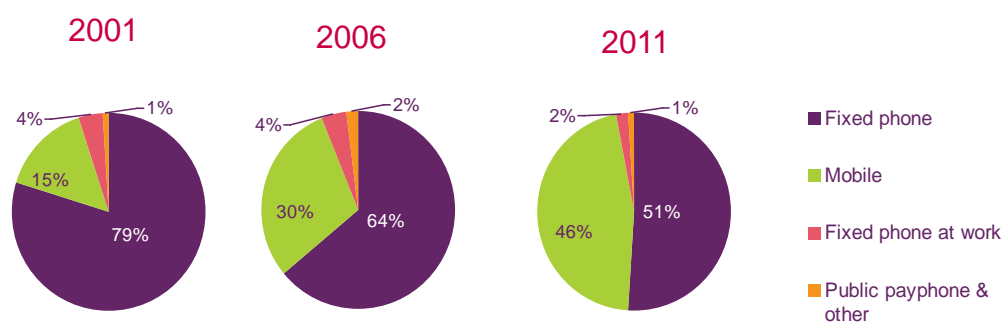
Within both business and residential groups, our aim was to include regular users of their fixed line. Given the limited number of groups available to us, we felt that regular users of a fixed line would more likely be affected by a change and therefore have more to contribute than consumers who either did not have a fixed line or used it very rarely.

Finding regular users for the business groups was easily achieved within the business groups. However finding residential consumers who used their fixed line regularly was more difficult, particularly amongst the younger age groups.

This reflected the growing use of mobile phones and the overall downward fixed line voice usage trend, as illustrated below.

Changing methods of telephony: 2001 - 2011

Main method of telephony used



Source: Ofcom/ Ofcom/ Ofcom technology tracking survey, Q1 2011, Q2 2006, Q1 2001
2011 Base: UK adults aged 16+, n = 3474

As a result, within the residential consumer groups, there was generally a mix of fixed line usage in each location – from regular users (as defined above) to much lighter users.

Within each business group, there was a spread of company size and sector as well as representation of companies which considered a local presence important for trade. Also included were businesses which used a range of physical media to advertise (e.g. flyers, vans, signage, shop-fronts, etc).

The focus groups were conducted during May 2011.

The focus groups followed an agreed approach, summarised as follows:

1. Introduction
2. Presentation of either the Overlay Code or Number Change option. Respondents were asked to read the description, clarify any questions and then write down their initial view as means of anchoring their individual opinions before the discussion began. The presentation order of these two options was rotated across the groups to minimise the risk of any order effect.
3. Each option was then discussed with question prompts about their usage of, and attitudes towards the importance of maintaining geographic identity and the local dialling facility
4. After discussion of both options, respondents were asked to vote on which one they would prefer

5. Finally, the additional scenario was introduced and discussed, and a final vote was taken on all three options.

Full sample specification, discussion guide and proposed options can be found in the Annex.

Section 2

Executive Summary

Responses to the solutions to number exhaustion varied across the sample

Responses to the Overlay Code and Number Change options were mixed amongst both the residential consumer and business audiences. This division of opinion was consistent across all four locations and within the groups themselves.

There was some support from heavier fixed line users for the Overlay Code but the majority of residential consumers were against this option

About 2/5 of residential consumers supported the Overlay Code option. These were generally heavier fixed-line users, who were often older and who liked this option because it was easy to understand and it involved no change to existing numbers. The remaining 3/5 of residential consumers rejected this option because they felt that two codes would be confusing, would reduce the geographical significance of an area code and could lead to discrimination between businesses and consumers with new and old numbers.

The rejecters of the Overlay Code option were generally those who had little to lose by any changes to a fixed line number. They rejected the option that would suit them as individuals and supported a change which maintained the current system and one that they thought worked best for the community in the long-term.

Half of the businesses vociferously oppose number changes due to the potential cost to them

The response from businesses was somewhat different in that the greatest strength of feeling amongst businesses was against a number change. Half of the businesses came out very vociferously against this option because of the potential costs and re-engineering that would be required. These rejecters of a number change appeared only to support the Overlay Code option because there was no change to the number and therefore no direct cost to them.

The other half supported a number change because of their dislike of an overlay code

The other half of the businesses were less reactive to a number change because the impact of a number change was not as great as it was with some other businesses. Instead they supported a number change because of their dislike of an overlay code. Similar to consumers, they felt that it was important to maintain geographical significance for identifying businesses and this was best achieved by a single area code. The strength of feeling amongst businesses against an overlay code was illustrated by the fact that half of the business sample was prepared to face the costs of number change, even when presented with an option that would mean no change.

Local dialling is used by consumers and businesses, but not seen as a necessity

Overall, there is very clear evidence to suggest that whilst local dialling is still widely used by residential consumers and businesses, it is largely taken for granted and seen as “nice to have”, not a necessity. Very few consumers or businesses had concerns if it was to

disappear and this facility did not appear to play a part in how they came to view each of the options.

Geographic numbering is still highly valued by consumers and businesses

In contrast, maintaining the geographic significance of an area code was considered important by some businesses and residential consumers – for a mixture of emotional and practical reasons. Dilution and potential erosion of the geographic significance of a single area code by an additional code was a concern to many consumers and businesses. Several businesses were prepared to accept the cost of a number change in order to maintain a single code.

Overall, consumers and businesses appear to be accepting of either option

Overall, attitudes amongst the vast majority of residential consumers and about half of the business sample appeared to be relatively accepting of any of the options. Whilst there was widespread opposition to an overlay code, the strongest voices were from those businesses who faced significant costs due to a number change. This was illustrated by the migration of the majority of consumers and almost all businesses to the alternative scenario, which proposed no further change following closing local dialling for over 10 years.

Removing local dialling and introducing an overlay code in 10-15 years' time was the most popular

This scenario appeared to make sense to a lot of businesses as they were unsure of their future over that length of time; and to residential consumers because it was straightforward and they were unsure of what would happen to technology in that time. Only those with little to lose from a change to their fixed line number now suggested that this option was delaying the inevitable and it was better to make the number change now.

Change is widely accepted so long as there is a good rationale and is part of a wider strategy

It would appear that there is widespread awareness of number changes around the country and there is a strong acceptance of change, particularly in relation to technological advances. There is also a certain scepticism that fixed line numbers are running out when fixed line usage seems to be decreasing. Overall, the evidence suggests that any option could be taken. The key to success will be to ensure there is a solid rationale that is part of a wider national strategy; there is some reassurance that the solution is long-term and there is clear communication of the details of the change.

Section 3

Main Findings

3.1 Consumers: Key Influences

- Residential consumers' fixed-line calling behaviour appeared to have some influence on their responses to the proposed options.
- **Heavy fixed line users . . .**
 - Tended to be older (i.e. over 55+ years old) or young mothers who spent more time at home and were signed up to packages that allowed them to talk for as long as they liked at any time of day.
 - Many had kept their same fixed-line number for a long time and tended to remember most numbers they called. They also stored numbers in their fixed-line handset or kept numbers written down in their address book by the phone.

"I've had the same number for years. All my friends and family know it and it would be a lot of work telling them about a new number, especially those abroad" (55+ yrs old, Consumer, Milton Keynes)
 - Overall, these heavy users were more invested in their fixed line than their mobile and, as a result, were more resistant to change.
- **Lighter fixed line users . . .**
 - Tended to be younger and spent considerably less time at home than heavy users so the majority of calls were made using their mobile. The fixed line was used mainly for calls to 08xx numbers and to family members in the evening.

"I do use it sometimes – to call 08xx numbers because they cost a fortune from a mobile – but not much. I know that if it rings it'll be one of my family."(25-34 yrs old, Consumer, Stoke on Trent)
 - For a few of the youngest ones, the fixed line was barely used at all and was there simply to provide the broadband service.
 - Overall, lighter users were much less invested in their fixed line and, as a result, many of this group were much less resistant to any change. A fixed line number change would, in many cases, make little difference to them.

3.2 Businesses: Key Influences

- Amongst businesses, there was a broad range of issues which appeared to have an influence on their responses to the proposed options.
- Businesses which appeared resistant to a number change tended to include those who...
 - **Used a wide range of different media for advertising.** Businesses such as caterers, florists and estate agents used vans, signage, flyers and shop fronts and thought the cost of a change would impact their business heavily.
 - **Had a wide customer base (locally, nationally and internationally).** These businesses felt that contacting their customers could be costly, time consuming and could result in loss of business.
 - **Used a large number of fixed lines.** The two examples in our sample, a software company and a telesales businesses, thought the cost and complexity of re-configuring could have a serious impact on their business.
 - **Had kept the same number for many years.** Several of the businesses in the sample had been in business a long time and had an older customer base – any change they felt could be disruptive and difficult for them and their customers.
- Other businesses which appeared more accepting and less resistant to change tended to have . . .
 - **A national focus by advertising with a 08xx number.** Some of these businesses only gave out their local number once a customer was engaged and so the impact of a change was minimal.
 - **Exclusively a local customer base.** These were a small minority of businesses who liked the local dialling facility because their customer base was only local, elderly and made use of this facility.
 - **An online marketing focus** rather than traditional 'bricks and mortar'. The ease by which details could be changed meant these businesses were least impacted by any change.
 - **Limited reliance on fixed lines** as their means of communicating. These businesses, particularly tradesmen, had become so much more reliant on their mobiles that fixed lines were becoming less relevant.

3.3 Response to Scenarios

A. Overlay Code: Residential Consumers

- 27 out of 63 consumers voted for this option and these were generally heavier fixed-line users.
- The key strengths of this option were that it was considered easy to understand and involved no changes to their current number
 - *“This seems good to me, I don’t have to change anything” (45-54 years old, Consumer, Stoke on Trent)*
- The loss of local dialling was largely not an issue and certainly not a barrier for supporters of this option
 - Whilst many consumers used this facility, most felt that it was nice to have but by no means essential
 - Several mentioned they were already dialling the area code with some numbers they did not dial regularly because they were used to doing so on their mobile.
“Because I use my mobile so much during the day, it’s now habit to dial the code anyway” (35-44 years old, Consumer, Bradford)
 - Some of the older consumers thought dialling the code and number in full would be extra work but they were happy to sacrifice this facility if there was no change to their number
“It’s a bit of nuisance but you’ll get used to it. We dial the code for Worthing and other local areas so it’s no big deal” (55+ years old, Consumer, Brighton)
- Supporters tended not to think about the implications of this option beyond that it would not really affect them. To this extent, there was no great strength of feeling in favour of this option beyond being simply convenient
 - *“It’s just the easier option for me – nothing changes. We’d get used to either option really, but since you’ve asked I’ll go for the one that affects me least” (55+ years old, Consumer, Brighton)*
- Rejecters of this option – often younger lighter users of fixed lines– came up with a number of reasons why they felt this option would not work . . .
 - **Lack of consistency within the area could lead to confusion and misdials** – particularly if the same number was issued to both codes
“It would be a pity if you had the same number as a take away with the other area code – that would be a pain” (18-24 years old, Consumer, Milton Keynes)
 - **Lack of consistency with the rest of the country**
“It doesn’t seem right that you could be living next door to someone with a completely different area code. I’m not sure it happens elsewhere” (25-34 years old, Consumer, Bradford)
 - **Dilution / erosion of the geographical significance of a single area code.** Many felt that people might be confused when identifying businesses from that area.

- **Discrimination between old and new.** From a business perspective, several admitted that they would probably purchase certain goods or services from businesses with an old number

“It would depend on the business, but if I were looking for a builder, I’d definitely go for the one with the old number as they would seem more established” (35-44 years old, Consumer, Milton Keynes)

Some anticipated that two areas codes would also encourage a division within the area based on new versus old telephone numbers, i.e. new numbers going to ‘new people’

“If the new numbers go to new developments, then people could be identified by these new numbers. I can see there being some snobbery about this in Brighton” (25-34 years old, Consumer, Brighton)

- **Shorter term than a number change.** Several felt that if a change was going to have to happen, then a longer term solution would be best for all
- The strength of feeling amongst some of these rejecters against this option was often stronger than those who were in support of this option.
- However, it is worth noting that many of these rejecters were lighter users and therefore not really affected by any change to their fixed line. Given the limited personal impact of a change, it is perhaps not surprising that, in a group setting, they argued strongly for an option that appeared to them to be more for the general good than for themselves.

A. Overlay Code: Businesses

- As with consumers, responses from businesses to this option were very polarised, albeit for slightly different reasons.
- Exactly half of the business sample supported this option (14/28) because there would be no cost or inconvenience to them
 - *“This is fine, it doesn’t affect me and we won’t incur any costs” (Business, Stoke on Trent)*
- The facility to local dial was of little consequence to the majority of these businesses and the loss of this was not a strong enough reason to reject this option
- When compared with the potential cost and inconvenience of a number change, the introduction of two codes to an area was also not thought to be an issue
 - *“It’s possibly a bit selfish but I’m not bothered about others. I’m concerned about the cost to my business of changing the number on my vans, flyers and shop-front. It would cost me thousands” (Business, Brighton)*
- Overall, support for this option by some businesses was vigorous because of the strength of feeling against a number change, as opposed to any particular positive attitudes towards an overlay code.
- The other half of the businesses which rejected this option did so, primarily, because they felt that two area codes would dilute the geographic significance of a single area code.

- For some, this meant that trade could be affected

“In this area, people know that a Milton Keynes code will spread across to Nottingham and other neighbouring areas. I think a new code will confuse people and they will go elsewhere because they’re not sure” (Business, Milton Keynes)

- Two businesses also relied on area codes for organising their mobile teams

“We still use area codes as back up for identifying where we should send our ambulances. If someone gives us the wrong postcode, then we use the area code to check. A new area code could be confusing for our operators” (Business, Milton Keynes)

- Several businesses felt that two codes could also lead to discrimination between businesses with old and new numbers. Many agreed with consumers that businesses with the old code might be favoured over those with the new code, therefore unfairly penalising new or expanding businesses
- None of these businesses rejected this option due to the loss of the local dialling facility
- Overall, whilst those businesses rejecting this option were not as vociferous as those rejecting the number change, the strength of feeling was illustrated by the fact that half of the business sample was prepared to take on the costs of a number change, even when presented with an option that would mean no change.

B. Number Change: Residential Consumers

- When shown in isolation, i.e. before consumers had seen the Overlay Code option, there was, generally, a grudging acceptance across the consumer sample
 - To a large extent, this option was expected and several were aware that this had happened in other places
 - Adding an additional digit to the number was seen as relatively straightforward
 - Whilst the new code was not ‘theirs’, it would be the same for everyone and they would adapt to it quickly
 - But several of the older respondents thought it was difficult to understand and other heavier fixed line users were against a change and began to question the suggested approach

“Why can’t they just add a digit here and not change the area code – it seems a bit complicated” (55+ years old, Consumer, Stoke on Trent)

- When discussed and compared with the Overlay Code option . . .
 - Maintaining geographic identity through a single consistent code for the area was seen as the key strength by supporters of this option
 - For some, this was important for simply nostalgic or emotional reasons

“That’s how it’s always been, it’s what we’re used and I don’t think it should change” (35-44 years old, Consumer, Bradford)

- For others, the reasons were more practical - for recognising businesses, and identifying or screening callers
- The longevity of this option was also attractive to some consumers
- Keeping the local dialling facility was generally not a driver however – most were largely unconcerned about this
- Overall . . .
 - 36 out of 63 consumers voted for this option, many of whom were lighter users of fixed lines, younger and perhaps less inconvenienced by a number change
 - But there were also several heavier fixed line users, who having initially voted for the Overlay Code option, changed their minds during the discussion
 - These changes of mind illustrated that, amongst consumers, there was not considerable strength of feeling either for or against each option.
 - Many admitted that whilst a number change was preferred in principle they would not be particularly upset by either option and would get used to what was decided.

B. Number Change: Business

- When shown in isolation, i.e. before businesses had seen the Overlay Code option, there was, generally, widespread dislike of this option by businesses. Businesses were much less accepting of this option initially than consumers.
 - A change of number would be costly to all, but particularly for those businesses which advertised with a range of different media or which used a complex telephone system

“We’ve got 6 vans, a shop-front, flyers, signage – it would cost us a fortune, literally thousands which would hit us pretty hard” (Business, Brighton)

“We’ve got over 40 lines and this will take quite a lot of effort and time to re-configure. There will be a significant cost attached” (Business, Milton Keynes)
 - Others were also concerned about the potential loss of business, particularly those with a very varied, large or ageing customer base

“We’ve got customers all over the place – telling them all will be a big job and I worry that we’ll just lose some of them” (Business, Milton Keynes)
 - A small minority thought a number change would be acceptable
 - The very few which just had local customers like the idea of keeping local dialling for their customers

“For my customers, they would just have to add a ‘9’ to the number, which would be easy” (Business, Stoke on Trent)
 - Those who advertised with an 08xx number

*“It wouldn’t really affect us that much. We’d have to make some changes but no great hardship as most of our stationery has the national number”
(Business, Brighton)*

- When discussed and compared with the Overlay Code option . . .
 - All of those particularly affected by the potential cost and inconvenience of a number change remained steadfastly against it. The introduction of a second code was not considered an issue, when compared with the potential cost of a number change

“Call me selfish, but I don’t care about the other code, I’m just very against having to outlay a whole load of money to change my stationery” (Business, Milton Keynes)
 - However, several of those who were initially against a number change felt that maintaining the geographical identity of their town through a single unified code was important and changed their vote

“I don’t like the idea of two codes, it will confuse customers when they are looking for a business and it’s not what we’re used to” (Business, Milton Keynes)
 - Aside from a tiny minority, keeping the local dialling facility was not a driver for supporting this option
- Overall . . .
 - Votes were divided equally for and against this option (14/28)
 - Those businesses which rejected this option did so with strength of feeling that far outweighed how other businesses or any consumers felt about either option. It was clear that the businesses who rejected this option felt they had a lot to lose from a number change.
 - The businesses which were in favour of this option appeared to have much less to lose financially and therefore, much like many consumers, favoured an option that maintained the current system.

C. Additional Scenario (removal of local dialling facility followed by overlay code 10-15 years later)

- Consumers who supported the Overlay Code option and many of those in favour of a number change migrated to this scenario. Overall, 51 out of 63 consumers voted for this additional scenario.
- Amongst businesses, the vote for this option was almost unanimous – 25 out of 28.
- For both businesses and consumers, closing the local dialling facility was seen as the least disruptive route and, behaviourally, an easy step.
- For many consumers, the uncertainty around technological advancements meant this was the sensible route

“Who knows where we’ll be in 10-15 years, will we even use fixed lines then?” (35-44 years old, Consumer, Brighton)
- Many businesses were also not sure where they would be in 10-15 years and so this seemed the most sensible interim measure

“I’ve no idea whether I’ll be doing what I’m doing now in 10-15 years, so let’s keep it the same and wait and see” (Business, Stoke on Trent)

- Just a few number change supporters amongst the consumers thought this option was only delaying and it was better to make a number change now

“We’re delaying the inevitable – much better to start again now than wait another 10 years” (25-34 years old, Consumer, Brighton)

Annex

Methodology

12 x 1 hour groups were conducted – with eight respondents in each group – across four locations in the UK, as follows :

| User Type | Location | No. of groups |
|-------------|--|---------------|
| Residential | Stoke on Trent (2), Milton Keynes (2) Brighton (2), Bradford (2) | 8 |
| Business | Stoke on Trent, Milton Keynes, Brighton, Bradford | 4 |
| | TOTAL | 12 |

Within each residential group . . .

- A mix of regular users of their fixed line (i.e. they used a fixed line about the same amount as their mobile) and less regular users
- All were the person responsible for paying the bills and ensure
- A mix of age, gender and socio-economic grade
- A mix of fixed line operators

Within each business group . . .

- All made calls regularly from their fixed line (i.e. use a fixed line the same amount or more than their mobile for business calls)
- All were the business owners or had some responsibility for telecoms in the organisation
- A mix of sizes – from sole traders up to 50 employees
- All traded locally, e.g. estate agent, builder, grocer, landscape gardener
- A mix of those using a mix of physical advertising, e.g. signs, vans, shop-fronts, flyers, etc

The groups followed an agreed discussion guide (see next page)

- When assessing the proposed options, we rotated the order in which the options were presented was rotated across the groups to reduce the possibility of an order effect.
- The options were presented as a *fait accompli* rather than asking respondents to comment as if it were not going to happen. This minimised the risk of outright rejections.

Discussion Guide / Stimulus

| | |
|----|--|
| 1. | <p>Brief introduction / warm up</p> <p>Who we are, our independence and confidentiality. Explain the group is on behalf of Ofcom and about telephone numbering; it's just an hour long and we're looking for spontaneous, brief answers.</p> <p>Ask respondents to introduce themselves and give a brief description of their fixed line usage (frequency of calls, to whom, etc), continue until everyone is engaged.</p> |
| 2. | <p>Assessment of Options: Overlay Codes and Number Change[Rotate the presentation order]</p> <p>Explain to respondents that fixed line telephone numbers are running out in their area and Ofcom needs to take action to ensure there are sufficient numbers available in the future. We have two options both of which will ensure sufficient numbers for a long time. One of these options will be chosen and this research will have a significant influence on that decision.</p> <p>Explain that we will ask respondents to read each option, write down their individual views and then discuss as a group.</p> <p>Hand out the first option (see end for presentation rotation). Encourage questions to ensure everyone has the same understanding. Discourage any commentary or opinion at this stage. Note any areas of confusion and ensure everyone is clear before continuing.</p> <p>Ask respondents to write down their first impressions, individually, and to give the option a rating 0-10 where 0=completely unacceptable, 10=completely acceptable</p> <p>For each option, encourage spontaneous discussion and then probe on . . .</p> <ul style="list-style-type: none">- Key strengths and weaknesses- Comprehension / areas of confusion (e.g. around cost of calls)- Implications / degree of impact in terms of . . .<ul style="list-style-type: none">▪ Local dialling (current usage / perceived importance)▪ Significance of current code (importance / value associated with recognising a location through a number; degree of concern / harm if no longer available)▪ Perceived inconvenience / Associated costs- Levels of acceptance / tolerance (and degree of feeling)- Is acceptability affected by understanding?- Listen and explore any sense of 'unfairness' |
| 3. | <p>Response to additional option:</p> <ul style="list-style-type: none">- Individual write down followed by discussion- Does the additional timeframe – i.e. approx. 15 yrs – make any difference to their preferred choice? How / in what way? |

4.

Final Review:

- Preferred option – take a vote.
- Additional comments and thoughts

Thank and close.

Option O: Overlay Code

This option means that, as numbers in one area code run out, a new area code is added (or overlaid) to that area.

For example, current Brighton users have 01273 numbers, but if a new area code was introduced in Brighton, current users would retain the 01273 code while new users would be given another code such as 01281.

What would this mean to you?

- ◇ Your existing code and telephone number, as well as those of all current local users, stay the same
- ◇ Only new numbers will have the new code
- ◇ The two codes (old and new) would relate to the same area
- ◇ Local dialling (i.e. making a call without having to dial the area code) would not be possible in the area. All callers in the area (i.e. those with the existing code and those with the new overlay code) would need to dial the code and the number – when making a local call.

Option N. Number change

A number change creates more numbers by changing existing numbers to a new shorter area code and adding digit(s) to make a longer local number. It would be necessary to change the entire area code - it would not be possible to use the same numbers as the current area code – however the last six digits for a customer would remain the same as their current number, and a padding digit would be added.

All numbers in the area would change in the same way – i.e. a new shorter area code and a '9' would be added in front of the current 6-digit number to make a 7-digit number. For example, in Brighton, 01273 654321 might change to 0103 9654321.

What would this mean to me?

- ◇ Your current number would have to be changed as explained above.
- ◇ All numbers in the same area would share the same area code and numbers could be dialled locally (i.e. without the area code).
- ◇ All existing numbers in the area and local businesses would need to plan to change numbers featured in signage, stationery, advertising etc.

Additional Scenario: Closed Local Dialling / Delayed Overlay Code

This option means that, as numbers in an area run out, the facility to local dial (i.e. make a call locally without having to dial the area code) will be removed. All numbers in the areas will have to be dialled with the area code. This will add enough new numbers to last over 10 years.

In these areas it might be possible to delay introducing the overlay code for over 10 years and in some cases for even 20 years. However our current forecasts indicate that generally an overlay code would be required in these areas eventually.

Which would you prefer?

- ◇ Close local dialling imminently and follow this by an overlay code in approximately 15 years
- ◇ A number change now (with no changes within 30-40 years)