Ofcom

THE FUTURE OF TELEPHONE NUMBERING
MCMR/188

A QUALITATIVE RESEARCH STUDY

FINAL REPORT

DECEMBER 2018

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1. Executive Summary

1.1 Introduction

Ofcom is responsible for the effective management of telephone numbers in the UK. This includes ensuring that numbers are available for use when they are needed by consumers, businesses and public services.

Against this background, Ofcom commissioned Futuresight, in April 2018, to conduct in-depth qualitative research among consumers to update its understanding of telephone number use in the UK.

The overall aim was to assess what individuals and micro-businesses understand, want and need from telephone numbers. Specifically, the aim was to assess the perceived value of location significance in geographic numbers and the use of non-geographic numbers as a micro-payment mechanism. As a part of assessing future needs, we tested the participants' response to a range of potential future scenarios. See Appendix 10.3.

In summary, this was a qualitative study in the form of 14 focus groups and 8 in-depth interviews amongst a cross-section of consumer and business decision-makers across all four UK nations, covering urban, suburban and rural locations.

The fieldwork was conducted in June 2018.

1.2 Summary of key insights from the research

1.2.1 The perceived value and appeal of landline telephony is increasingly limited to an older generation of consumers

There are clear indications of a decline in use of landline telephony, with its perceived value and importance increasingly limited to older consumers (particularly retirees).

There is also evidence of a decline (albeit slower and more gradual) among micro-business owners and other business users, as businesses become increasingly digital in nature.

1.2.2 Older consumers value geographic numbers highly and regard area code location identity as helpful and trustworthy

Older consumers, particularly retirees, had a high awareness of area codes and placed a particularly high level of value and trust in codes that were local to them.

Area codes were seen widely by the older generation as helpful and reassuring when searching for a local business and when making and receiving calls from friends, family and local organisations.

1.2.3 Younger consumers are largely indifferent in attitude, given very low usage and engagement with landline telephony

Younger consumers often failed to recognise geographic numbers as area codes. For the most part, area codes offered very little value in terms of location identity.

Instead, younger participants relied on other methods of search for people and businesses, normally via mobile-based stored contacts and online mapping.

Moreover, very few recognised the geographic significance of area codes, associating them instead, often negatively, with numbers used by nuisance callers and call centres.

1.2.4 Among micro-businesses, the perceived value of geographic numbers and location identity varies widely

Micro-businesses and sole-traders reliant on local custom placed a very high value on location identity. Perceived value was more variable among larger micro-businesses seeking to trade with customers both locally and further afield. Whilst their own area code served their business well, it could be a brake on growth when seeking to trade regionally or nationally.

Digital businesses (operating entirely online) considered location identity to have little if any value or relevance to their business.

1.2.5 Local dialling is not valued highly

Across both the consumer and business samples, the ability to dial a local number without the area code from another local landline number (known as 'local dialling'[1]) was not a major concern or consideration.

Many were highly accustomed to including the dialling code when dialling a landline number from their mobile phone. For the most part, not having to dial the area code in their locality, was viewed as a very marginal benefit.

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[1] See Section 2.6 for a more detailed description.

1.2.6 For non-geographic numbers with no revenue share (080 and 03), higher levels of understanding and trust are evident when they are used by high profile brands and organisations

Among consumers, when shown in isolation, awareness and knowledge of freephone 080, and particularly 03, was patchy. When seen in an advertised context, 080 and 03 were accepted largely on trust when used by high-profile and well-known brands and organisations. For the most part, it felt safe to assume that high profile enterprises would not charge for calls (beyond the standard call cost charged by phone companies).

In some cases, the lack of tariff information in advertising for 03 could continue to cause doubt and uncertainty. Many in the sample were not certain enough that calling a 03 number would cost the same as calling a 'standard' landline number (or free to call when included in their allowance).

1.2.7 Among micro-business owners, 080 and 03 are not generally perceived as possible alternatives to geographic numbers

Among micro-business owners, the main perceived benefit of geographic landline numbers was that they 'tied' a business to a specific locality. Rather than a benefit this could be a seen partially as a drawback for some larger micro-businesses who sought to trade with customers living locally and further afield. This had led some to consider the use of a non-geographic number, though none in the sample had actually taken one up.

Despite having some benefits, the disadvantages of non-geographic numbers tended to dominate. They were seen by most to be anonymous and impersonal and associated with call centres. Whilst offering the potential to attract customers from further afield, they were likely to risk too great a loss of local custom. This conflict was seen to be inevitable, so long as geographic numbers (as area codes) were tied to specific locations.

1.2.8 Advertised 084 and 087 non-geographic numbers are viewed with suspicion by older consumers and can act as a barrier to engagement

Poor awareness and poor perceptions of value and trust were very evident for chargeable numbers, particularly among older consumers.

When shown in an advertised context, confusion, mistrust and uncertainty were most evident for the number ranges beginning with 084 and 087. Older participants expressed resentment about a perceived lack of cost transparency and an inability to determine the likely length of the call and therefore the overall call cost.

Resentment was also evident about being charged for calls that they felt they might need to make. This meant that they had no choice but to incur the cost.

084 and 087 numbers were also viewed as a concern given the potential for confusion with freephone 080 numbers. This led some to consider that vulnerable or potentially vulnerable people could be 'caught out' and end up, inadvertently, with a large phone bill.

Younger participants were largely indifferent in their attitude to 084 and 087, given high levels of confidence in being able to avoid calling by interacting and transacting online instead.

1.2.9 Awareness, understanding and trust in access charges and service charges for revenue-sharing numbers was typically very limited across the sample

Very few participants in either the consumer or micro-business sample were aware of their provider's access charge. In addition, many were not aware that an access charge was charged on a per-minute basis. Instead, when considered, many assumed that 'access' meant a one-off charge. This led many (particularly older) participants to consider that chargeable numbers lacked transparency, i.e., the access cost element was often thought of as a 'hidden charge'.

Many, particularly younger consumers in the sample, were largely accepting of access charges and service charges given a perceived ease in avoiding the use of revenue-sharing numbers by going online.

1.2.10 There was widespread acceptance of the use of 09 premium rate numbers for high profile broadcast voting and phone competitions

The use of 09 by high profile broadcasters (for the purposes of voting and phone competition entry) was widely accepted. This was mainly because tariff information, along with ready access to terms & conditions, was perceived to be clearly stated, and was well understood and trusted. Whether they voted or entered a competition or not, many felt that they were able to make an informed choice.

Acceptance was so strong, in many cases, that 09 was not associated with the service. They simply called a 'number' if they wished to vote or enter a competition, being aware of the service charge that would be incurred and knowing the likely length of the call would be short. This meant that many either 'overlooked' or accepted the variable cost of the access charge element.

Unlike 084 and 087, the overall charge for 09 was considered to be fair or acceptable in relation to the perceived value of the service (and low frequency of using).

1.2.11 Participants' spontaneous views related mainly to changes to chargeable numbers

From the consumer perspective, very little spontaneous mention was made about possible future changes to geographic numbers. For non-chargeable numbers (03 and 080) there was a widespread and spontaneous call for the mandatory inclusion of tariff information that confirmed that they were free or standard rate numbers.

Considerably greater clarity and simplification was felt to be needed with chargeable numbers. The key concerns were the potential for confusion, particular given the apparent similarity of 084, 087 and 080 numbers, and perceived lack of call cost transparency.

Ideas put forward were (i) a voice notification at the outset of the call and not just in advertising, (ii) a clear indication of the likely length of the call, and (iii), a single charge structure, that standardises the access charge across providers. These would allow participants to make an informed choice based on explicit sight of a total call cost.

1.2.12 Participants' responses to future scenarios related to changes in the short, medium and long term

Based on responses to the future scenarios shown to them, there are high levels of acceptance to the closure of local dialling in all areas and the abolition of 084 and 087.

At the same time, there are high levels of rejection of any loss of the geographical significance of area codes and the abolition of 09 for high profile voting and phone competition entry.

In the longer term, the evidence suggests an increasing level of consumer acceptance to the loss of geographical significance, as landline usage declines much further among the older generation. There is also evidence to suggest an increasing level of acceptance to the abolition of 09, as alternative micro-payment technology continues to develop or evolve.

2. Research Design

2.1 Overview

Ofcom required in-depth research to be conducted primarily among private (non-business) consumers. As an adjunct to this, people with essential business needs were included in the sample, i.e., sole-traders and employees working at or from home and owners of micro-businesses with dedicated business premises.

More specifically, Ofcom wished to understand:

- The role(s) that telephone numbers play in the day-to-day lives of consumers.

- Perceptions of telephone numbers at the level of landline, mobile and 'special' service (i.e., 03, 08 and 09).

- The perceived value of location significance in geographic numbers.

- The level of trust in location significance versus more freedom in how numbers are used.

- Views on the ability to dial a local landline number without the area code.

- The use of telephone numbers as a micro-payment mechanism.

- Understanding of, and attitudes to, numbers that have an access charge and service charge pricing element.

- Perceived differences between 08 and 09 numbers and the type of services supplied via them.

2.2 Research method

Given the exploratory nature of this study, an in-depth qualitative approach was used.

We conducted 14 focus groups among consumers and 8 individual in-depth interviews among micro-business owners. With each of the consumer focus groups, we included 2 participants who were either sole-traders or employees working at, or from home.

The groups each lasted for around 120 minutes and the in-depth interviews lasted for about an hour.

A simple pre-task was assigned to all participants for completion prior to the sessions. This pre-task was designed to capture basic information about use of a landline and mobile telephone. Please see a copy of this pre-task in Appendix 10.1.

2.3 Sample selection

In selecting the sample, our aim was to achieve a full representation of UK adults, aged 16+. To do this we used gender, life-stage and socio-economic status as our main sampling variables. We also ensured that participants were drawn from both urban and rural locations in all four UK nations, i.e., England, Wales, Scotland and Northern Ireland).

Ethnicity, lone parenthood and employment status were also used as sampling variables, in order to ensure a full sample representation.

For micro-businesses, we ensured that all participants were owners or directors of companies employing 2-10 staff. Most of these companies operated from dedicated business premises.

Finally, we included one location (Aberdeen) where local dialling[2] has been closed for a significant period (since 1st October, 2014). This allowed us to compare and contrast views of local dialling in areas where it is permitted and not permitted.

For all participants, landline and mobile usage was allowed to fall out naturally.

2.4 Final sample achieved

Figure 1, below, shows the final consumer focus groups sample achieved, and Figure 2, overleaf, shows the final micro-business sample achieved.

Figure 1 Final consumer focus group sample achieved:

		England	Scotland	Wales	Northern Ireland
Young, single (c. 16-21)	ABC1	London	Aberdeen		
	C2DE			Cardiff	Belfast
Pre-family (c. 22-34)	ABC1		Johnstone		
	C2DE	Sheffield			
Family (c. 32-44)	ABC1	Chipping Sodbury			
	C2DE		Johnstone		
Empty-nesters (c. 45-64)	ABC1	Sheffield			
	C2DE	Chipping Sodbury			
Retirees (65+)	ABC1			Wrexham	Belfast
	C2DE	London	Aberdeen		
Totals:		6	4	2	2

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[2] See Section 2.6 for a definition of local dialling and its closure in certain areas of the UK.

Figure 2 Final micro-business sample achieved:

	Sector / type	Role	Size	Primary market		Location
1	Catering equipment	Owner	7	B2C[3]	Regional	Sheffield
2	Bed & Breakfast	Owner	2	B2C	National	Chipping Sodbury
3	Estate agent	Owner	2	B2C	Local	Chipping Sodbury
4	Wholesaler	Owner	4	B2B	National	Chipping Sodbury
5	Oil & gas consultancy	Owner	9	B2B	Regional	Aberdeen
6	Bookshop	Owner	2	B2C	Local	Cardiff
7	Digital signage	Director	5	B2B	Regional	Johnstone
8	Printing	Owner	3	B2B	National	Belfast

The fieldwork was conducted in June 2018. Please see Section 2.6 for definitions of terms used in the above table.

2.5 A note on interpretation, analysis and reporting of qualitative data

It is important to note that the findings of this report are not statistically representative of the views of the general public. Qualitative research is designed to be illustrative, detailed and exploratory and provides insight into the perceptions, feelings and behaviours of people rather than conclusions drawn from a robust, quantifiably valid sample.

2.6 Terms used in this report and their definitions

Finally, when reading this report, a number of key definitions should be kept in mind, as follows:

Geographic numbers: A geographic number is a landline telephone number where the first part of the number, the 'area code', contains geographic significance. This is used to route calls to the location of the subscriber to the telephone number itself.

Non-geographic numbers: A non-geographic number is a type of telephone number that is not linked to a specific geographic location. Numbers that use the prefixes 080, 03, 084, 087 are common examples. These numbers are used for a variety of reasons by public and private companies and organisations, for flexible routing of incoming phone calls to generating revenue for paid-for services.

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[3] B2B = Business to Business; B2C = Business to Consumer, indicating the type of market that the micro-business trades in.

Local dialling and closed local dialling areas: Local dialling is the facility to omit the area code when dialling a local landline number from another local landline number. Currently, there are six UK areas codes that are closed to local dialling. In these areas, the whole phone number, including the area code, needs to be dialled (in the same way that such calls are made from a mobile phone). These areas are Aberdeen, Bournemouth, Bradford, Brighton, Middlesbrough and Milton Keynes. The area code in Bournemouth (01202) was closed in November 2012. The remaining five areas were closed in October 2014. Closing local dialling provides more usable numbers in an area and is a measure taken when the supply of new numbers becomes scarce.

Chargeable numbers: These are a sub-set of non-geographic numbers that are used specifically by companies and organisations to generate revenue. 084, 087 and 09 are examples of chargeable numbers.

Access charge and service charge: Chargeable numbers have a two-part charging structure. The **access charge** is the per minute charge for connecting the call and goes to the caller's phone company. The **service charge** is the remainder of the call charge and is set by the organisation being called[4].

Micro-business owners: Owners of a business with 2-10 permanent staff, working in dedicated business premises.

Sole-traders & Small office Home office (SoHo): Self-employed owners of businesses operating entirely from their home. Includes people who work on the move, e.g., tradespeople, and employees who work outside of the home but bring work home and / or work on a flexi-time basis, and typically making use of mobile and landline telephony for business purposes.

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[4] For more information, see Ofcom's Call costs guide.

3. Context

3.1 Introduction to this chapter

In this section, we set out the main characteristics of the sample in terms of current use of landline and mobile telephony. We also draw out differences across the consumer sample (principally by age) and the micro-business sample (principally by perceived need and value).

3.2 Landline and mobile telephony usage

Pre-task data[5] from our research indicates a clear decline in landline calling. This was particularly evident among younger participants. This pattern is also very strongly evident in large-scale survey data. Ofcom's recently published 'Communications Markets Report[6]' shows a clear and ongoing decline in the use of landline telephony. This applies to both residential and business markets. Figure 3 shows volumes for UK geographic calls dropping from 69.1bn minutes in 2012 to 34.7bn in 2017. The total of landline call minutes has declined from 103bn in 2012 to 54bn in 2017.

Figure 3 Landline call volumes
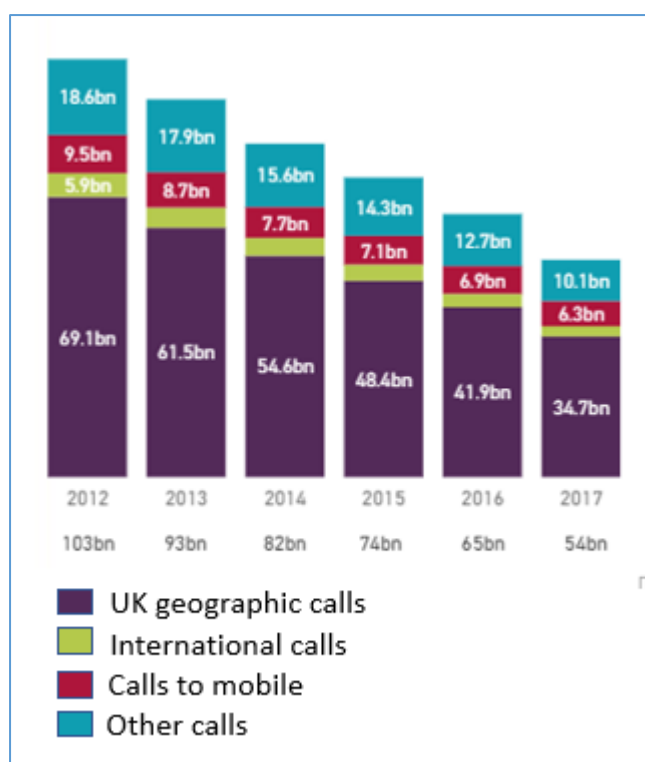
Source: Ofcom / Operators

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[5] See a copy of the pre-task questionnaire used in this research in Appendix 10.1.
[6] See: Ofcom: Communications Market Report, August 2018, Chapter 4.

At the same time, mobile phone use for voice telephony has increased. Figure 4, below, shows an increase from 132.1bn minutes in 2012 to 148.6bn minutes in 2017

Figure 4 Mobile voice call volumes
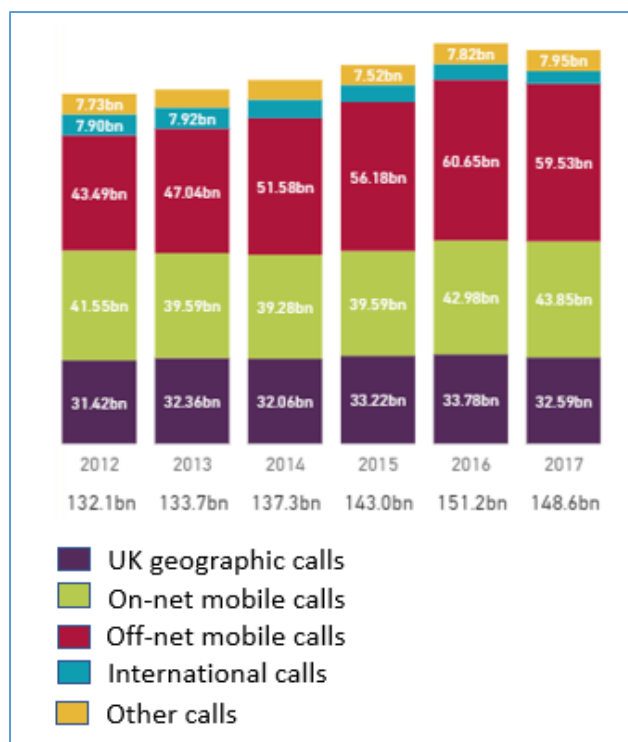
Source: Ofcom / Operators. Note: Includes estimates where Ofcom does not receive data from operators

Our own study indicates that mobile take-up among older participants (65+) is now more widespread, with many reporting that reduced cost, and not just convenience, is a key driver. Ofcom survey data for 2018[7] shows that 87% of over-55-year olds now make use of a mobile phone.

This said, the rate of increase for mobile calls has not been quite as a marked as the rate of decline for geographic landline calls. Indications from our own study suggest that both SMS text and internet-based messaging apps are preferred alternatives to voice for many. Messaging, as opposed to voice, is particularly prevalent among younger participants.

In our study, many older participants, by contrast, claimed a stronger preference for voice communication, offering the perceived benefits of personal contact and dialogue.

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[7] See Table 29: Ofcom: Technology Tracker, H1, 2018.

Younger participants, in turn, expressed greater confidence in the use of online communication apps, including webchat as an alternative to calling individuals or companies.

> *"I prefer to speak to a person. You can get a better understanding."*
> Peter[4], 68, mobile and landline user, Belfast.

> *"Calling someone is a bit daunting. It's much easier and quicker to WhatsApp my friends. If I have to call a company, I'll always try to use webchat if it's available."*
> Annie, 18, mobile only user, Aberdeen.

3.3 Key differences across consumers, micro-business owners and other business users

3.3.1 Consumers

Among private, non-business users, a major difference in landline voice usage was evident between younger and older participants. As a general point, it was clear throughout this study that generational differences were very evident and had a major impact on perceptions of telephone numbers.

Typically, many younger participants (16-21 years) claimed not to use a landline phone at all. Usage, when evident, tended to be a 'last resort' (when for example 'having to' make a call and no mobile signal was available). Many of the youngest participants in the sample lived with their parents at home where, quite often, a landline phone was available. Some claimed that they would answer it on behalf of their parents and very occasionally make a landline call – nearly always to speak to an elderly relative or when the conversation needed to be particularly formal, e.g., a job application. For the most part, landline phones – whether at home or elsewhere, were regarded widely by younger participants as 'irrelevant', inconvenient and 'old-fashioned' (compared to mobile).

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[8] All names used in this report have been changed, in order to preserve the anonymity of participants.

> *"There's a landline phone at home, but, as far as I'm aware, it's really not used. Maybe on the odd occasion to an older member of the family who doesn't have a mobile phone, but that'd be the only real reason."*
> Jon, 17, mobile only user, Belfast.

> *"I personally don't speak on a landline phone . . . ever."*
> Julie, 19, mobile only user, London.

At the opposite end of the age spectrum, many older participants (65+) claimed to be making less use of their landline phone, but, compared to their younger counterparts, usage tended to be more prevalent, despite many having a mobile phone.

This was attributed by many to 'habit', i.e., it feeling natural to pick up a landline handset to make a call, rather than their mobile, when at home. Some also claimed to feel more certain and confident when using a landline, compared to a mobile.

For other older participants, landline usage was minimal, with a claim that they only retained a landline handset as a back-up for emergency calls, given the greater perceived reliability of a landline connection.

> *"It's not something we use a lot, but we keep it for emergencies. I trust a landline more than a mobile for that."*
> Joan, 73, landline and mobile user, London.

One or two, typically among the oldest in the sample, were landline only users, and considerably more reliant on a landline phone.

> *"I don't have a mobile. I just can't get on with them. Just the landline for me."*
> Anthony, 81, landline only user, Wrexham.

'Mid-life' participants, i.e., pre-family, family and empty-nesters, tended to be more exposed to landline telephony in a business or work context. Moreover, many claimed that that they made use of landline phones at work (or at home, for work purposes), given the benefits of geographic landlines to business. These benefits were related to both image and location significance, i.e., a landline serving to convey permanence and reliability, via a fixed, known and well-established location.

In addition, landline usage was more prevalent in a work context given the tendency for many companies and organisations to use landline-based VoIP systems (given the features and functionality that these systems offered).

> *"It's reassuring to customers to call them on a landline. They can see who [and where] we are."*
> Jane, 37, mobile and landline user, Johnstone.

> *"We have to use landlines at work."*
> Paul, 24, mobile and landline user, Belfast.

3.3.2 Micro-business owners

Typically, strong reliance on landline telephony was evident among micro-business owners in the sample, along with strong support among micro-business owners for geographic numbers. Actual usage in terms of outgoing calling varied considerably, from relatively very minimal and sporadic, to frequent and regular (daily) usage.

For many, the perceived value of landline telephony was twofold: to convey an image of permanence to both existing and potential customers, and location identity. These two factors tended to be linked in terms of communicating and reassuring customers that the business was well-established in a fixed location.

> *"A [geographic] landline number tells people where we are and that we're a proper business. We use mobiles most of the time but you wouldn't want to advertise that. Mobile numbers can make you look like a bit of a fly-by-night."*
> John, 42, micro-business owner, mobile and landline user, Johnstone.

> *"Geographic numbers help you to identify and verify things about a person or a business . . . you know where they are and you know they're genuine."*
> David, 38, micro-business owner, mobile and landline user, Cardiff.

Some micro-business owners in the sample had mixed views in that geographic landlines and local numbers were valued for local business, but could limit potential customer demand from further afield.

Finally, one exception, in the micro-business sample, was the owner of a digital business (conducting business purely online), who claimed that both landlines and geographic / local numbers were of very limited relevance and value.

Note: See Section 5.4 for a more detailed assessment of the perceived value of geographic numbers among micro-businesses.

4. Telephone numbers - overview

4.1 Introduction to this chapter

In this section, we describe spontaneous levels of awareness, knowledge, associations and usage of telephone number ranges among consumers and micro-business owners. To do this, we gave participants a pack of cards with each card showing a different telephone number range. Participants were asked to sort these cards into different piles, depending on how they perceived the ranges to either differ from each other or combine together in some way. At no point, prior to or during this exercise, were participants prompted or directed in any way. This allowed us to explore and assess perceived differences between geographic, non-geographic and chargeable numbers at a spontaneous level.

4.2 Summary of key findings in this chapter

Among consumers, major differences were evident between younger and older participants in terms of awareness of telephone number ranges, and certainty in terms of their meaning, association with services, cost and value. In particular, awareness and understanding among younger participants of the geographic significance of area codes were extremely limited, compared to their older counterparts.

Micro-business owners and other business users demonstrated greater awareness and knowledge, drawing on their experiences of landline use in their work. Owners in particular were more strongly motivated to know and understand telephone numbers, given the importance to many of area code location identity and the potential benefits of non-geographic numbers.

Consumers by comparison (across all age groups), were much less motivated or engaged with telephone numbers.

This stemmed often from low and limited frequency of voice calling (beyond family and friends) and a desire to avoid calling number ranges that were not recognised. In this, there was a fear of being charged and / or encountering a business or call centre seeking to sell them something.

Lack of dialling experience was also a factor that contributed to low engagement, with many participants relying on stored contacts, together with the use of return-call options and hyperlinking (when searching for a person or business online). Poor memorability of number ranges was also mentioned.

4.3 Awareness, knowledge, associations and usage

4.3.1 Consumers

Major differences were evident between younger and older participants[9], in terms of awareness of number ranges and certainty in terms of their meaning, association, cost and value.

In summary, the key differences, across the main life-stages, are shown in Figure 5, below.

Figure 5 Differences by age / life-stage in terms of awareness and certainty

	High awareness / certainty	Patchy awareness / uncertainty	Very low / no awareness
Younger	07	080 --------------------- 03	Area codes as geographic numbers --------------------------- 084 / 087 --------------------------- 09
Mid-life **Older**	07 --------------------------------- Their own area code --------------------------------- Some neighbouring area codes --------------------------------- Some main city area codes	080 --------------------- 03 --------------------- 084 / 087	The location of other area codes --------------------------- 09

As can be seen, at a spontaneous level, a considerable lack of awareness and uncertainty was evident among younger participants. Very few were aware of area codes as geographic locations or chargeable 084, 087, and 09 numbers. Some claimed to be aware of 080 and 03 but certainty regarding their meaning and cost were typically very patchy.

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[9] At the extremes, by 'younger' we mean primarily 16-21 years olds but this could also include pre-family participants (ranging in age from around 22 to 29 years). By 'older', we mean 65+ retirees, with (typically) comparatively limited digital experience and considerably higher landline usage. 'Mid-life' embraces the life-stages in between of family and empty nesters. Overall, the core distinction between 'younger' and 'older' related to digital 'nativism' and landline experience, i.e., people born and growing up in the digital era, with limited landline experience, and vice versa.

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Among older participants, and particularly the oldest in the sample, considerably greater awareness of area codes was evident. Awareness of their own area code was strongest, but also many were aware of neighbouring area codes and main city codes, e.g., London, Birmingham, Manchester, Edinburgh.

In Northern Ireland, awareness across the different age groups was more prevalent for the main area code, i.e., 028[10]. Awareness of specific town and city codes was much less developed, particularly among younger participants.

For example, most in the Northern Ireland sample recognised 028, but only a portion of the sample, living in Belfast, were aware of (028) 90 as an area code for Belfast. As for participants in the other UK nations, awareness of area codes (as area codes) outside of their own area was more variable.

Among older participants across all UK nations, awareness and certainty of the meaning and cost of non-geographic numbers was patchy. Some were convinced that 080 was free and that 03 was either free or relatively very low in cost.

> *"The 0800 is free and the 03 one . . . I think . . . is free if it's part of your allowance."* Nigel, 52, mobile and landline user, Chipping Sodbury.

Spontaneous awareness, recognition and knowledge of chargeable numbers (084, 087 and 09) was very limited, across most of the sample. Some, typically, older participants, claimed to be aware of 084 and 087, describing them as 'premium' or 'expensive'. 09 was least well recognised and understood. A few in the sample associated 09 with 'adult' services, with a tendency to think of the call cost as considerably higher than the actual maximum charge[11] allowable.

> *"Those* [084, 087] *are premium ones. They're really expensive and ones to avoid."* Tony, 44, mobile and landline user, Johnstone.

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[10] The 028 area code is for the whole of Northern Ireland including Belfast. Within Northern Ireland, local landline telephone numbers are eight digits long. The first two of these digits give more precise details about which area a number is likely to be from. For example, (028) 25 covers the primary area of Ballymena.

[11] The maximum allowable service charge for 09 is currently £3.60 per minute, or £6 per call. When considered, many participants assumed that the cost of chargeable numbers was higher than the actual maximum charges allowable. Most were not aware that charges (up to the maximum) varied and that many service providers apply much lower charges than the maximums allowable.

A few in the sample, typically among the mid-life groups (pre-family, family and empty nesters) were more knowledgeable, often drawing on experiences of landline use in their work. Among this minority, rather than fears about costs, a greater concern related to the potential for confusion, particularly between 084 / 087 and 080[12]. This led some to complain that people without knowledge could be easily caught out.

> *"084, 087 and 09 are chargeable. The 084 is cheaper than the 087 one and the 09 is the most expensive. I think that, so long as you know, it's fine . . . you can make an informed choice. The worry is that 084 and 087 are so similar to the 080 one. Some people . . . I'm thinking of the elderly . . . could be caught out by that."*
>
> Jenny, 42, mobile and landline user, Chipping Sodbury.

4.3.2 Consumers – key factors that contribute to low awareness and uncertainty

A range of factors were identified that contribute to low awareness and certainty. These were evident for geographic, non-geographic and particularly chargeable numbers.

Typically, low awareness and uncertainty stemmed from low and limited frequency of voice calling (beyond family and friends). This related mostly to low frequency of need, but also to avoidance: many expressed a desire to avoid calling number ranges that were not recognised, given a fear of being charged and / or encountering a business or company seeking to sell them something.

Across much of the sample, lack of dialling experience was also a factor. Many participants relied on stored contacts (particularly for mobile calling), together with the use of return-call options and hyperlinking (when searching for a person or business entity online).

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[12] The same type of confusion is evident between 07 mobile and so-called 'follow me' 070 personal numbers. Ofcom's October 2018 statement of the regulation of telephone numbers beginning with 070 concluded that 070 numbers are often mistaken for mobile numbers, which can lead to bill shock, given that the prices for calling these numbers are usually much higher than they are for calling a mobile number. Ofcom's statement sets out how the 070 number range will be regulated. See: Final statement: Personal numbering - Review of the 070 number range, Ofcom, October 2018**.**

Poor memorability of number ranges was also mentioned widely as a factor. Beyond specific numbers for close friends and family, many participants expressed difficulty in remembering the meaning and significance of specific prefix ranges.

This related in part to perceived lack of distinctiveness, particularly between the 080, 084 and 087 ranges, and in part to lack of experience of dialling them.

> *"It's hard to know. You see these 08 numbers and you think you know one of them and then there's others that look similar."*
> Sandra, 26, mobile and landline user, London.

> *"I don't need to remember numbers. I just use the ones that are stored."*
> Tanya, 22, mobile only user, Belfast.

Finally, across much of the sample, participants stated that they had no major perceived need or motivation to overcome their lack of awareness and uncertainty. This was because of the ease of avoiding unknown numbers. Some participants claimed to feel comfortable with 'knowing what they don't know', given the very low frequency, and therefore low perceived impact / threat of harm, of ever having to call an unknown number.

> *"If I have to call [an unknown number], it's not very often. It'd be different if I was having to make lots of calls every day."*
> John, 57, mobile and landline user, Chipping Sodbury.

4.3.3 Micro-business owners and other business users

Typically, micro-business owners in the sample demonstrated higher levels of awareness and accuracy of understanding of telephone numbers. Some employees in the sample were also more knowledgeable, given high levels of landline and mobile phone usage in their work. Figure 6, overleaf, shows the overall pattern.

Figure 6 Awareness and certainty among micro-business owners and other business users

High awareness / certainty	Patchy awareness / uncertainty	Very low / no awareness
07	0808	The location of other area codes
-----------------------	-----------------------	-----------------------------
Their own area code	084 / 087	09

Most neighbouring area codes		

Many main city area codes		

080		

03		

Unlike many consumers, business owners and other business users tended to be more aware of area codes and their geographic significance. This was particularly so for their own area, but also other areas that were related to competitor businesses and existing and potential customer catchment areas.

Business owners and other business users also tended to be more certain / confident in their understanding of non-geographic 080 and 03 number prefixes, stemming from a motivation to determine their potential as alternatives to geographic numbers. Higher levels of awareness and discrimination were also evident for 084 and 087 as chargeable numbers, with business owners and other business users claiming to have looked at the possible merits and drawbacks to their business of using either 084 or 087.

"We've looked at the merits of moving to a freephone number."
Gary, 42, micro-business owner, mobile and landline user, Chipping Sodbury.

"We rely a lot on the landline so I guess, inevitably, you get to know what all the different numbers mean."
David, 38, micro-business owner, mobile and landline user, Cardiff.

5. Specific views of geographic landline numbers

5.1 Introduction to this chapter

In this chapter, we cover specific views of geographic landline numbers among consumers and business owners and other business users in the sample. Our main focus in this chapter is on perceptions of the value of geographic numbers and the level of trust that people have in them.

5.2 Summary of key findings in this chapter

Major differences were apparent between younger and older consumers, and between consumers and business owners and other business users, in terms of perceived relevance, value and trust in landline geographic numbers.

Among younger consumers, the perceived value of landlines *per se* was very limited, with a poor understanding of area code location identity. Views were often quite negative, given a tendency to associate landline numbers with nuisance calls and call centres. By contrast, older consumers, micro-business owners and other business users, placed a considerably higher value on location identity and particularly their own area code. The meaning and significance of area codes was viewed widely as helpful – to know where businesses are and to assist in identifying in-coming calls as local (as opposed to a nuisance caller). Considerable trust was evident in providing a reasonably reliable indication of location.

Among most micro-business owners in the sample, a landline identity itself was valued highly. In addition to location identity, a geographic landline number was felt to reassure customers that the business was genuine and established.

Some business owners were less reliant on a geographic landline number, given the digital nature of their business. Other owners had mixed views about the benefits of location identity, when seeking to attract customers from further afield. Whilst a landline area code strengthened local business, it could make it more difficult to compete with businesses in other areas. The use of non-geographic numbers was considered by some as a possible solution, though none had taken this up.

Finally, consumers, micro-business owners and other business users shared similar views of local dialling. In essence, local dialling was not a major or highly conscious consideration. For most, it was considered to be only a marginal benefit. Similar views were evident in Aberdeen, an area chosen for this research, that is closed for local dialling.

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5.3 Consumers – value and trust in area code identity

Among consumers, major differences were evident between younger and older participants[13] in terms of perceived value and trust in geographic numbers.

5.3.1 Younger consumers

Among most younger participants in the sample, the value of landlines *per se* was very limited, given very limited awareness and association with location. More than this, younger participants' views of landline numbers could be quite negative, given a considerable degree of misattribution i.e. a tendency to associate landline numbers generically with businesses and call centres, rather than areas or locations.

> *"That* [01xxx] *number looks like a call centre number."*
> Ian, 19, mobile only user, Aberdeen.

> *"These numbers* [01,03] *sound like they come from companies that want to sell you something."*
> Sarah, 18, mobile only user, London.

Perceptions of low value and mistrust were evident among this younger age group, given experiences of receiving 'nuisance' calls from companies using geographic landline numbers. Rather than indicating where the company was calling from (or that the company had an established physical location), the number was often viewed as a 'red flag', not to answer or call it.

Some younger participants were familiar with their own area code though, for the most part, this still did not signify location.

> *"My parents' phone starts with 01707. That feels normal to me. If it was any other number, it would feel odd."*
> Nicky, 20, mobile only user, London.

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[13] Ibid footnote 6.

When needing to contact a business or organisation, the natural inclination for many was to search for it using a smartphone (via Google), and to then click on a number as a hyperlink. Location information was evident from a map display and / or address next to the number, given that their phone 'knows' their location. Searching in this way meant that there was no need to associate the number with a location or to mentally register it when calling.

> "If I'm trying to find a cycle shop, I Google 'cycle shop' and it shows me on a map. It gives me a telephone number if I need to call them."
> James, 19, mobile only user, Aberdeen.

> "I don't need to know numbers to find things."
> Barney, 17, mobile only user, London.

5.3.2 Older consumers

By contrast to younger consumers, older participants (particularly the oldest, retiree groups) placed a high value on area code location identity.

In the main, the highest value was placed on their own area code, which was seen widely to be particularly useful in the following ways: (i) to know where local businesses are (and / or that businesses sought out are locally-based), (ii) to save time and be able to avoid calling businesses that are too far away, and (iii) to assist in identifying in-coming callers as local (and therefore more likely to be a person or business they can trust, rather than a nuisance caller).

> "It's helpful to know where things are."
> Janet, 67, landline and mobile user, Wrexham.

Knowledge of area codes in other areas (particularly neighbouring areas) could also be viewed as helpful, for those in the sample with friends and relatives living elsewhere, and when travelling to / staying elsewhere.

Aligned with value was trust. Despite some awareness that landline numbers could be diverted, most older participants in the sample considered that known area codes provided a reasonably reliable indication of location.

For area codes that were not known, a degree of wariness (similar to that expressed by younger participants) was evident. Despite recognising unknown area codes as area codes, there was a strong tendency to avoid answering and calling these numbers in the belief that they were nuisance calls from businesses and call centres outside of their area.

> *"How many times do you get a call from an 0161 number? I know it's Manchester but I also know it's going to be a PPI call, or that they understand I've just had an accident. Never answer them"*
> Joe, 74, landline and mobile user, London.

> *"If it's from [local area], I'll pick it up, otherwise I won't."*
> Jane, 62, landline and mobile user, Aberdeen.

5.4 Micro-business owners – value and trust in area code identity

The area code identity of geographic numbers was strongly supported by micro-business owners – from a personal perspective (as consumers) and (for most), from a business perspective.

The exceptions, from a business perspective, were among business owners running digital businesses (where locality in terms of customer demand was largely irrelevant) and business owners that had both a local and regional or national footprint. With the latter, area codes were felt to be very valuable for local business but a limitation when seeking to attract customers from a broader geographical area.

> *"An area code still defines you. You see a Johnstone number and that feels a lot closer than a Glasgow number."*
> John, 42, micro-business owner, mobile and landline user, Johnstone.

> *"It's a way of advertising where you are."*
> Jackie, 38, micro-business owner, mobile and landline user, Sheffield.

Other benefits of geographic numbers, mentioned by micro-business owners, related to additional 'status' information that area codes could convey. For example, a business operating in a central city location, with a central city area code, may be viewed by customers as larger and more prestigious than one operating in a smaller town. By the same token, a geographic number was felt by some to create a higher level of presence and credibility to businesses operating in more remote, rural areas.

> "If they're part of a big organisation based in a big city, and you see that they have a London or a Birmingham number, it kind of verifies that. Equally, if you're a small craftsman in a tiny village somewhere, and they've got a number in that area, you know they're genuine."
>
> David, 38, micro-business owner, mobile and landline user, Cardiff.

Despite the perceived meaning and value to micro-business owners and other business users, actual relevance and value to their business varied. This largely depended on the nature of the business, the location of their customer base, and aspirations to reach and attract customers from further afield. Figure 7, below, shows the range of different types of business in our study sample, and differences in the perceived value of location identity.

Figure 7 Differences by business type and value of geographic numbers

Type of business:	Example:	Customer base (actual / potential)	Perceived value of location identity
Sole-trader	Plumber	Local	Very high
Retailer	Bookshop	Local / regional	High
Bespoke manufacturer	Digital signage	Local / regional / national	Mixed
Commodity reseller	eBay wholesaler	National / international	Very low

In summary, micro-business owners and other business users who valued location identity highly were physically established in a local area. They had both a well-defined local customer base and were heavily reliant on local custom for their business.

> "[My area code] says I'm local, which is really important."
>
> Peter, 27, self-employed plumber, mobile and landline user, Chipping Sodbury.

At the opposite end of the spectrum, low perceptions of the value of identity were held by digital businesses, which, for the most part, traded online with customers who were actually or potentially located in all parts of the UK and, in some cases, internationally. For this latter sub-group, locality had little if any relevance when trading.

> "As far as customers are concerned, it doesn't really matter where we're based."
> Rob, 42, digital business owner, mobile and landline user, Chipping Sodbury.

In between these two extremes, other micro-business owners and other business users in the sample varied in their perception of relevance and value, with largely mixed views of the merits of geographic numbers. Despite having a strong local customer base, some felt that an area code could limit access to customers further afield. Some considered that what they were selling had actual or potential benefit and relevance to customers elsewhere, but that competitors local to them would be more strongly and naturally considered.

> "[An area code] *makes it harder to convince customers elsewhere. It says we are not local enough to them.*"
> John, 42, digital signage reseller, mobile and landline user, Johnstone.

> "[An area code] *makes us appear more local than we actually are.*"
> Anthony, 58, oil & gas consultancy, mobile and landline user, Aberdeen.

This appears to have led some micro-business owners and other business users to consider methods of overcoming the limitation, though they tended to consider that the options were few given the need to maintain a strong local identity. One business in the sample moved from Edinburgh to Johnstone and kept their Edinburgh 0141 area code. This proved to be effective in maintaining the perceived city-based size and prestige of the business (and its original customer base), although the task remained to develop awareness locally. As such, the solution was still not considered to be ideal.

Others, who were more strongly reliant on local business, expressed concerns about using geographic numbers from one area code in a different area, given the potential that this might have to mislead customers.

> "*It's misleading to say you are local, if you are not actually based there.*"
> Ben, 42, catering equipment supplier, mobile and landline user, Sheffield.

At a spontaneous level, few micro-business owners and other business users in the sample mentioned the use of non-geographic numbers as an alternative. One owner had actively considered the use of a freephone 080 number. Another claimed that they had considered 080 and 03 'in passing' but had not looked at it seriously. When asked to consider, the general view was that non-geographic numbers were not an ideal solution.

(See Chapter 6 for full details of micro-business owners' and consumers' views of non-geographic and chargeable numbers).

5.5 Local dialling – consumer and business users' current views

Consumers and micro-business owners and other business users had very similar views of local dialling. For most, landline dialling itself was not a major or highly conscious consideration. The exception was some in the sample who made landline to landline calls relatively very frequently for business / work purposes.

> "My stored numbers are down as the whole number I think. I'm not sure."
> Betty, 52, mobile and landline user, Sheffield.

Among the majority, (including business users in their personal lives), landline dialling was relatively low in frequency. Most tended to rely on stored numbers for friends and family. In any event, when calling on their mobile phone, the inclusion of the area code was mandatory.

> "Didn't know you could. Is that right? You can dial just the number?"
> Amy, 24, mobile only user, London.

When asked to consider local dialling, some claimed that they were not aware of the facility, i.e., they 'always' dialed the area code when dialling (whether the number was local or not). Others considered it to be only a marginal benefit, i.e., it 'saved' dialling a few extra digits when dialling a local number.

> "I just don't dial enough to care. If I was making calls all day, that's a different thing."
> John, 38, mobile and landline user, Johnstone.

Micro-business owners shared very similar views. In some cases, their office fixed telephony systems used Voice over IP, which required the area code to be dialled in any event. Some of the employees in the sample who made more frequent landline calls for work purposes claimed that they were accustomed to dialling the whole number.

> "I don't think that people miss the short form of the number. We all use mobiles and are used to the full number."
>
> David, 38, micro-business owner, mobile and landline user, Cardiff.

5.6 Views among consumers and business users in Aberdeen - a closed local dialling area[14]

Among our sample of consumers and micro-business owners and other business users in Aberdeen, there was no spontaneous mention of the closure.

> "Hard to recall, to be honest."
>
> Joan, 72, mobile and landline user, Aberdeen.

When asked to consider, none expressed any major concern about the change. Some were not aware that the change had even taken place. Among those who could recall the change, a few described it as initially a little inconvenient, after which they became quickly accustomed to it.

> "What's that about then?"
>
> Andy, 21, mobile only user, Aberdeen.

> "It's one of those things . . . a bit of an inconvenience and then you get used to it, and then everyone forgets it ever happened."
>
> Angus, 67, mobile and landline user, Aberdeen.

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[14] Local dialling in Aberdeen (01224) was closed in 1st October 2014. See Section 2.6 for a full definition.

Some maintained that the way that the change was communicated helped to reduce any potential for annoyance or confusion, i.e., that the reason for the change[15] was clearly conveyed, understood and accepted, and the change itself was well publicised.

> "I seem to remember it was well advertised and explained."
> David, 66, mobile and landline user, Aberdeen.

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[15] Closing local dialling makes additional numbers available for use in that area. A shortage of numbers restricts the choice of phone companies and communications services available to local consumers and businesses.

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6. Specific views of non-geographic and chargeable numbers

6.1 Introduction to this chapter

In this chapter, we cover specific views of non-geographic landline numbers (along with chargeable numbers as a sub-set) among consumers and micro-business owners and other business users in the sample. Our main focus in this chapter is on perceptions of the value of non-geographic and chargeable numbers and the level of trust that people have in them.

6.2 Summary of key findings in this chapter

Across the consumer sample, poor awareness, confusion and uncertainty, regarding non-geographic and chargeable numbers, was very evident. The exception was the mobile prefix 07. Compared to chargeable numbers, 03 and 080 prefixes seemed familiar to many, particularly to older participants, but there was much uncertainty regarding the cost of 03, and considerable confusion relating to cost between the 08x ranges, i.e., 080, 084 and 087. Some participants singled out 084, 087 and 09 as 'premium' and tended to assume that these numbers were costlier than the actual maximum rates allowable. Awareness and understanding of access charges and service charges were particularly poor.

The sight of 080 and 03 in an advertised context changed views of these prefixes to a considerable degree. The use of these numbers by high profile brands and organisations increased trust and the belief that they were either free or very low in cost. 0800 was considerably more familiar as a freephone number compared to 0808. Uncertainty remained as to whether 03 was free or not. The lack of tariff information for 03 did not help to confirm that 03 was free or charged at a standard rate.

Sight of 084 and 087 in an advertised context worked much less to engender trust. Once understood (from accompanying tariff information) that these numbers were chargeable, distrust and resentment were widespread. The main concerns were an inability to determine the actual cost, prior to making the call. This stemmed from indeterminacy regarding the length of the call, and lack of transparency of the actual cost (given very limited prior awareness of their phone company's access charge).

Typically, younger participants were more accepting of 084 and 087, given a greater level of certainty / confidence that they could be avoided (typically by interacting and transacting online).

Older participants were much less accepting, given a belief that they may have an unavoidable need to call an 084 / 087 number.

Views of 09 numbers stood apart somewhat from 084 and 087. Typically, for high profile broadcast services, such as voting for a favoured contestant, an advertised context worked particularly well to engender trust. Many in the sample felt that they were already well informed about the tariffs, terms and conditions for high profile phone competitions and voting and felt therefore, that they could make an informed choice. This was despite the fact that most participants did not associate 09 with these services.

Finally, micro-business owners and other business users shared similar views to consumers with regard to chargeable numbers. They differed in the main in their view of 080 and 03 as possible alternatives to geographic landline numbers. Whilst both prefixes had potential to attract a large customer base, the anonymity and impersonal nature of these numbers was off-putting. They were also considered to be potentially misleading to customers if the business served only a local area.

6.3 Perceived value and trust among consumers

To recap on Chapter 4, poor consumer awareness, confusion and uncertainty was evident for all non-geographic numbers except the mobile 07 number range. In turn, this meant that associations of the various number ranges with specific services was very limited.

Accompanying this was much distrust, negative preconception and avoidance. Despite some exceptions, engagement in terms of learning about non-geographic and chargeable numbers was very low. This was because participants felt that they were easy to avoid calling.

Among some, particularly older participants, 03 and particularly 080 could 'seem' more familiar, but uncertainty remained. When the number ranges were shown, considerable confusion was evident between 080, 084 and 087. There was also low spontaneous awareness and understanding of 03 as a standard rate number, that was free if included in their allowance.

Finally, though uncertainty of the cost, some in the sample singled out 084, 087 and 09 by describing them as 'premium'. Many had a strong tendency to assume that 'premium' was costlier than the maximum allowable premium charges actually were.

6.4 Specific views of advertised 080 and 03 numbers

Seeing 080 and 03 numbers in an advertised context[16] changed views to a considerable degree. The aim here was to gauge views based on the impact (if any) that examples of companies and organisations had, when advertising these numbers.

For many, particularly older participants, sight of advertised 03 and 080 numbers largely confirmed their initial thinking. This was that 080 was free and that 030 was either free or low in cost. Many expressed the view that sight of a range of high-profile brands / organisations using these numbers increased trust.

> *"I think I knew that 0800 was free. I wasn't sure about 03, but seeing that, you'd expect those companies to be free calls or a normal call cost"*
> Harry, 43, mobile and landline user, Sheffield.

Despite this, uncertainty remained evident for 03. The absence of tariff information[17] was not understood to mean that 03 was a standard rate call (or free if included in their allowance). Few claimed that they would be deterred by this, given the need, in many cases, to call companies and organisations of the kind that use 03, e.g., banks, retailers. Frequency of calling was low, and the general expectation was that call costs would be moderate. This said, some called for the tariff information for 03 to be advertised, to remove any uncertainty.

> *"I can't believe that the likes of the* [well-known charity] *would rip you off with call costs. They want you to call. Maybe there is a charge. I don't know. But it's hardly a worry if you think of how often you have to call. I think they should say though, what it costs, or if it costs."*
> Peter, 37, mobile and landline user, Johnstone.

Finally, uncertainty was also evident for 0808. By contrast, 0800 was more strongly recognised as a freephone number. Many did not recognise 0808 at all.

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[16] By an advertised context, we mean examples of company logos and telephone numbers that are presented online and in other media. To replicate this, we showed visuals to participants after all spontaneous views had been obtained.

[17] There is no regulatory requirement for companies and organisations to include any tariff information for 080 and 03 numbers.

6.5 Specific views of advertised 084 and 087 numbers

Participants' views of advertised 084 and 087 numbers indicate strongly that an advertised context for these numbers works much less well to engender trust (compared to 03 and 080). As with 03 and 080, the aim was to gauge views based on the impact (if any) that examples of companies and organisations had, when advertising these numbers. Many participants expressed a negative view. Perceptions of low value, along with distrust and resentment, were widespread. The main concern related to an inability to determine the total cost, prior to making the call, particularly in situations where there was a need to make a call.

> "It's a hidden cost. It says a certain amount per minute but not how long you'll be on the phone."
> Sarah, 32, mobile and landline user, Sheffield.

A few in the sample expressed stronger views, that companies were seeking to 'make money' from people who either weren't aware of the costs, up front, or had no choice in having to make the call.

> "I think it's a bit of a cash cow. Some people will call without realising. I'd feel very annoyed if I had to call. I reckon they'll keep you on the phone for ages. It's an easy way to make money."
> Tim, 42, mobile and landline user, Chipping Sodbury.

The presence of tariff information[18] did not serve well to clarify or reassure, given the focus on cost per minute, rather than a total call cost.

Confusion and resentment were also evident with regard to the 'access' charge, given that this actual cost of the charge is not stated and no indication is given that the access charge is a cost per minute rather than a 'one-off' charge.

Despite these negative views, there were differences across the sample in terms of acceptance. A major difference was evident between younger and older participants.

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[18] There is a regulatory requirement for companies and organisations to include tariff information in the form of the service charge when advertising 084, 087 and 09 numbers (as well as 118 directory enquiry numbers). This information must state the service charge as either a per minute cost, or total call cost. The phone company's access charge is referred to but is not stated explicitly, given that these vary across different phone companies.

Typically, younger people were largely unconcerned about chargeable numbers, in their belief that they could be avoided.

> *"If I needed to book a ticket, I'd do it online. I don't think you need to call. If needed to speak to someone, I'd use webchat if it was available."*
> Jon, 17, mobile only user, Aberdeen.

By contrast, older people, particularly retirees, could feel antagonised in situations where there was a need to call. Typically, this was driven by a reluctance or low confidence in their ability to transact online. Many wanted a free choice to engage by phone.

> *"I prefer to talk to someone, if you have a problem or something needs sorting out. I really resent the idea of being charged. The company knows you've no choice."*
> Terry, 74, mobile and landline user, Wrexham.

Some younger participants expressed concerns that older and potentially vulnerable people may be caught out.

> *"I think it's fine. The cost is clearly stated, and you can make an informed choice. But I'm not sure about the elderly who could easily miss the fine print and end up with a huge bill, not realising."*
> Sally, 53, mobile and landline user, Chipping Sodbury.

6.6 Specific views of advertised 09 numbers

Participants' views of 09 numbers stood apart somewhat from 084 and 087. Typically, for high profile broadcast services, an advertised context worked particularly well to engender trust.

As above, the aim was to gauge views based on the impact (if any) that examples of companies and organisations had, when advertising 09 numbers. Overall, there was widespread acceptance of the use of 09 for high profile broadcast voting and phone competitions. This was evident among both younger and older participants. The main reasons given for acceptance were that (i) tariff information, along with relevant Terms and Conditions, were clearly stated, known of and understood and (ii) the service itself was viewed by many to be of value. For the most part, participants felt that they could make an informed choice.

> "They [broadcasters] *make it really clear what it costs, and so people can make an informed decision."*
> June, 66, mobile and landline user, Belfast.

Positive views of broadcasters' use of 09 were more strongly evident among older participants. Many were more inclined to use the telephone if they were to vote or enter a competition. Younger participants were typically more neutral, and sometimes disinterested, given awareness of free-voting and competition-entry via an app. This said, many younger participants tended to favour 09 from a 'societal' perspective, i.e., that 09 provided an older population with an easy, convenient option to participate. Being without it would risk excluding people. This said, some were unconcerned, stating a belief that broadcasters should do more to promote alternative, cost-free, ways to vote.

> *"Doesn't bother me. You can use an app for free, if you want to."*
> Jo, 17, mobile only user, Cardiff.

> "They [broadcasters] *focus on the phone without people realising you can vote for free on an app. There are other ways they should make money."*
> Mac, 22, mobile only user, Johnstone.

Finally, awareness of 09 itself was generally low. The number range was not strongly associated with high profile phone-based competitions or voting. Typically, people who participated recalled the competition or vote and not the number they called.

The exception to this was the use of 09 by low profile services, e.g., horoscopes, adult services, etc., from 'no-name' providers. In this context, 09 was more strongly recognised (though not recalled) and associated with high cost, low value and poor transparency. Typically, assumptions regarding cost, were often much higher than the maximum charge permitted.

> *"Ah, yes, that's an 09 one. Complete rip-off. Best to steer well clear of them. I know someone who racked up a bill of about £1,800. Makes me angry."*
> John, 67, mobile and landline user, London.

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6.7 Awareness and understanding of access charges and service charges

Participants were asked about their awareness and understanding of access charges and service charges that are applied to chargeable numbers, 084, 087 and 09. We also showed participants details of current tariff charges and ceiling rates that apply. See Appendix 10.2 for the full version shown.

Across most of the sample, including micro-business owners and other business users, understanding of these charges was limited. Awareness of the actual chargeable rates was particularly limited. None of the participants in the sample were able to say what their own provider's access charge was. There was also a widespread tendency to over-estimate the actual cost of the service charge element, when examples of advertised services were shown.

> *"No idea. I just think of them as premium."*
> David, 62, mobile and landline user, Wrexham.

> *"No idea what my access charge is. I knew there was one, no idea of the cost."*
> Paul, 42, mobile and landline user, Chipping Sodbury.

Confusion was also evident with the use of the phrase: 'access charge'. Many participants were aware of the phrase, though some tended to assume that 'access charge' meant a 'one-off' charge, not a cost per minute. These participants tended to express surprise when details of their providers' access charge were shown.

Overall, the main concern expressed was one of indeterminacy. If a call was made to a chargeable number, many participants felt that it was not possible to determine the actual cost, prior to the call. Tariff information was widely considered to lack transparency in terms of the likely length of the call and the unquoted cost of the access charge component.

> *"You fear they'll just keep you on the phone for as long as possible."*
> Joanna, 32, mobile only user, Johnstone.

> *"How can you know what it costs, unless you know how long you're going to be on the phone for?"*
> Stuart, 68, mobile and landline user, Aberdeen.

Despite these negatives, few participants were negative or resentful at a personal level. In the main, they felt that chargeable numbers were relatively easy to avoid. Resentment was more evident at a societal level, with some participants expressing concern that vulnerable or potentially vulnerable people could incur charges that were higher than expected if they were unaware of the actual costs of the call.

6.8 Views of non-geographic and chargeable numbers among micro-business owners and business users

Micro-business owners, and employees using mobile and landlines for business purposes, tended to share similar views to consumers (described in the previous sections of this chapter), regarding usage and acceptance.

The main difference was among a minority of micro-business owners in the sample who had actively considered the use of non-geographic numbers as an alternative to geographic area codes. (None of the micro-business owners in the sample had actually taken up a non-geographic telephone service).
This minority tended to have more knowledge and understanding, with greater discriminatory awareness of the different non-chargeable and chargeable number ranges.

Overall, the main focus of interest tended to be 080 and 03. Chargeable numbers (084, 087 and 09) were, by contrast, perceived as less relevant and appealing.

With 080 and 03, the stated benefits related to free or standard rate cost, together with opportunities to attract a larger and wider customer base. De-coupling the business from its physical location helped to encourage customers to focus on the products and services on offer, rather than whether they were local to them or not. Also, for businesses located in smaller towns or villages (and particularly those that were home-based), 08 or 03 numbers had potential to make the company / business look bigger than it actually was.

For most micro-business owners and other business users, the drawbacks tended to outweigh the benefits, leading to rejection. Many in the sample relied on local custom and considered a geographic number to be essential. The few who did not, claimed that they were put off non-geographic numbers as 'anonymous' and 'impersonal'.

This gave rise to fears that potential customers could be deterred from calling, by mistaking the number for an 'impersonal' call centre (implying lengthy call queuing, scripted responses from call handlers, based outside of the UK). Compared to 0800, 03 was a particular concern given micro-business-owners' possible uncertainty among customers regarding the cost, i.e., that customers would be deterred from calling, given a mistaken belief that 03 was a premium number.

Micro-business owners and other business users' views of chargeable numbers, 084, 087 and 09 were relatively very similar to non-business consumers. No major positives were stated. The perceived drawbacks related mainly to the chargeable element. Micro-business owners in particular considered that the cost would be off-putting to customers. As with non-chargeable numbers, an additional concern related to the anonymity and impersonal nature of numbers. Local businesses in the sample were particularly averse, given the potential loss of location identity.

7. Overall views on the future of telephone numbers

7.1 Introduction to this chapter

In this chapter, we describe participants' spontaneous views regarding any needs and improvements to the UK numbering landscape in the future. We obtained these views prior to showing the potential scenarios that are described in Chapter 8.

7.2 Participants' views of the future for geographic numbers

Very little spontaneous mention was made about possible future changes to geographic numbers. This was evident across all types of participant in the sample. Two micro-business owners described a future scenario where all area codes were abolished, in order to create a 'level playing field for competing businesses across the UK.

Getting rid of all area codes was felt, ultimately, to encourage customers further afield to consider the value of goods and services on offer rather than the distance that they were from source. The difficulty in this was envisaged to be in the transition:

> *"It's really hard to imagine how you can make the change without people getting horribly confused. The end result is desirable, but it's difficult to see how you can get to it, without a lot of disruption."*
> John, 42, micro-business owner, mobile and landline user, Johnstone.

Overall, for the most part, both consumers and micro-business owners and other business users stated a desire to see geographic numbers remain as they are. The exception to this was the younger segment of the sample, though views on this were largely indifferent rather than actively in favour or against.

> *"Having more numbers is more valuable than local dialling."*
> Jo, 16, mobile only user, Aberdeen.

7.3 Participants' views of the future for non-geographic and chargeable numbers

Participants across the sample had comparatively more to say about non-geographic and particularly chargeable numbers.

For non-chargeable numbers (03 and 080) there was a widespread and spontaneous call for more information and greater clarity.

For 03, views were expressed about the need for tariff information to be included in advertising and publications next to the number. This would be to confirm that the cost is no more than a national rate call to 01 or 02 numbers and count towards any inclusive minutes in the same way as 01 and 02 calls.

For 080, consistent requests were made to abolish 0808 and keep 0800 as a single freephone number. This was suggested as a way to reduce confusion with chargeable 084 and 087 numbers, and respond to the relatively very limited familiarity and recognition of 0808 as a freephone number.

Greater clarity was also felt to be needed with chargeable numbers, plus a degree of simplification. Many participants felt that there was a need to reduce the potential for confusion, particular given the apparent similarity of 084, 087 and 080 numbers.

Some, particularly older participants suggested the need to abolish 084 and 087, leaving one freephone number (0800), standard rate number ranges (01, 02 and 03), and one premium rate number (09). Given that 09 was negatively associated (by some) with adult and other 'low quality' and potentially untrustworthy premium rate services, the idea of replacing 09 with a new premium number was mentioned, perhaps 06.

Finally, for chargeable numbers, many participants requested the need for greater transparency. Ideas put forward were (i) a voice notification at the outset of the call (and not just in advertising), that set out the cost per minute and the likely length of the call (to provide an estimate of the overall cost), with an option for the caller to abandon the call without charge if they wished to; and (ii), the development of a single charge structure, unifying the access charge across providers, to ensure that the total call cost per minute is easily understood and made explicit.

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8. Response to possible future scenarios for telephone numbers

8.1 Introduction to this chapter

In this chapter, we set out participants' reactions to a range of potential future scenarios. Six scenarios were shown. Three of these were for geographic numbers, and three were for non-geographic and chargeable numbers. Full details of these scenarios are provided in Appendix 10.3. They are summarised here as follows:

Geographic numbering:

1. The closure of local dialling in additional areas (as geographical numbers run out)
2. The closure of local dialling in all areas (irrespective of any shortage)
3. Area codes to lose their geographical meaning altogether.

Non-geographic and chargeable numbering:

4. For non-geographic numbering, everything to stay largely the same (service charge limits might change in the future)
5. The abolition of 084 and 087
6. The abolition of all chargeable numbers, 084, 087 and 09.

8.2 Summary of key findings in this chapter

Figure 8, below, shows the overall level of acceptance (on average, across all participants), of the potential future scenarios for geographic numbers.

Figure 8: Acceptance / rejection of geographic scenarios
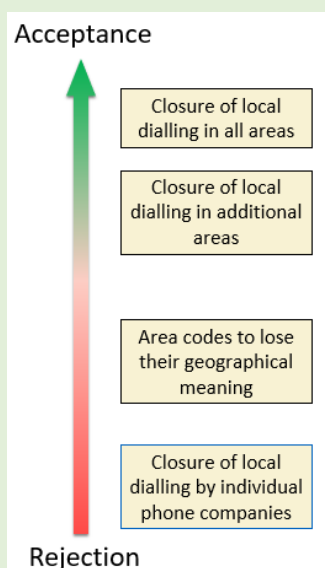

Broadly, there was a high and consistent level of acceptance, across the sample, for closure of local dialling. Differing views were evident on the times, i.e., as needed, or all areas at once. On balance, the majority were in favour of closure happening all at once.

Moderate to strong rejection was evident across the sample for the loss of geographical meaning (younger participants were more accepting). Older participants and most micro-business owners were strongly against.

Finally, the idea of closure of local dialling by individual phone companies was universally rejected.

Figure 9, below, shows the overall level of acceptance (on average, across all participants), of the potential future scenarios for **non**-geographic and chargeable numbers.

Figure 9: Acceptance / rejection of non-geographic and chargeable scenarios

Acceptance

Abolish 084 and 087

Keep chargeable numbers as they are

Abolish all chargeable numbers

Rejection
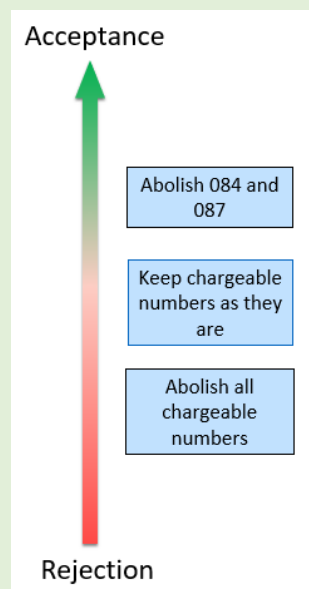
There was broad agreement across the sample regarding the need for simplification. Given that the 08x ranges were seen widely as confusing and hard to distinguish, acceptance was high for the abolition of 084 and 087. Acceptance was particularly strong among older participants, with a preference to be charged more directly and tangibly in other ways.

Moderate acceptance was evident among some in all age groups to the idea of keeping chargeable numbers as they are. Acceptance was stronger among younger participants, given their low level of reliance on telephony and a dislike of the idea of costs being recovered by providers more directly.

Finally, the idea of abolishing all chargeable numbers was moderately to strongly rejected across all age groups. Many, particularly older participants, wanted to see the retention of 09 for the purposes of voting and competition entry for high profile broadcasts.

8.3 Closure of local dialling

The closure of local dialling was widely accepted, by consumers, business owners and other business users alike. None in the sample expressed any major concern about doing so. The main issue raised by participants was the method, i.e., whether closure should happen area by area (as numbers run out) or across all areas, at the same time (irrespective of any shortage).

Closure was accepted because (i) local dialling was viewed as a very marginal benefit, (ii) it was only very occasionally made use of (by most) (iii) loss meant no major inconvenience or disruption, and (iv) a compelling reason was given for doing so, i.e., to avoid a number shortage.

> *"No great impact. I'm used to using an area code on* [my] *mobile."*
> Tony, 58, mobile and landline user, Chipping Sodbury.

> *"I wouldn't even notice it* [the change]. *I type the numbers anyway."*
> Tom, 18, mobile only user, Belfast.

(See Section 5.5 and Section 5.6 for further details on participants' existing attitudes and behaviour when dialling a landline number).

A shortage of numbers was viewed by most as a particularly compelling reason for closure. Avoiding a shortage (and, in so doing, avoiding any change in the area code itself) was strongly preferable to the perceived minor benefit of not having to dial a local area code.

> *"Having more numbers is more valuable than local dialling."*
> Julie, 19, mobile only user, London.

> *"Making sure there are enough numbers is a very good reason to do it."*
> Jeff, 64, mobile and landline user, Sheffield.

Views differed widely on the method of closure, i.e., whether it should happen area by area (as numbers run out) or all at once (across all areas of the UK). In general, views among micro-business owners were more strongly expressed than those of consumers. Many micro-business owners held stronger beliefs about the need to avoid any confusion in the use of area codes.

> *"If you're going to do it, then you have to do it everywhere. If you only did it in certain areas, you just end up confusing people."*
> David, 38, micro-business owner, mobile and landline user, Cardiff.

Many consumers were also of the view that closure, area by area, could be confusing, and a possible burden to have to remember when and when not to dial in different areas.

> *"Doing it in additional areas is confusing for older people. They should get rid of it altogether, or keep it."*
> Janet, 82, landline only user, Wrexham.

By the same token, closure in all areas was viewed widely as less confusing, the 'same' for everyone, and easier for everyone to quickly get used to it. This is bearing in mind that many in the sample didn't feel they missed local dialling in any event.

Closure in all areas was rejected by some in the sample. The main reason stated was that closure in areas where there was no number shortage was unnecessary. It was felt that there was no compelling reason to do it and, therefore, possibly an unnecessary expense to implement.

Finally, there was little, if any, support for individual phone companies to be allowed to decide on whether or not to provide local dialling. Most participants felt that this would be potentially very confusing, and a major burden on people to have to remember when they must dial the area code in the same area to different phone company subscribers.

> *"If you let different providers decide whether to do it or not, that could get really confusing. You could get a situation where people think they have the wrong number."*
> John, 42, micro-business owner, mobile and landline user, Johnstone.

Overall, and on balance, closure in all areas and by all phone companies was accepted more widely than a piecemeal approach to closure.

8.4 Gradual loss of the geographical meaning of area codes

There was very limited acceptance to the idea of losing geographical meaning. Rejection was expressed by participants of all ages, backgrounds and areas lived in. Rejection was particularly evident among micro-business owners, including those in the sample who did not have a business need for an area code identity.

> *"I prefer to have geographical codes. Personally, I want to know where things are when I need something."*
> Rob, 42, digital business owner, mobile and landline user, Chipping Sodbury.

In the consumer sample, rejection was evident among younger people despite their lack of need or desire to make landline calls. Some felt that it would be confusing for older people. Others were concerned that it might increase the need to have to answer nuisance calls (given a lessened ability to determine whether the caller is a person or a business call centre).

> *"Knowledge is established and it is useful to keep it."*
> Diane, 26, mobile and landline user, Johnstone.

> *"There'd be lots of confusion and more risk of dodgy numbers or calls."*
> Davy, 18, mobile only user, London.

Some younger people, on the other hand, liked the idea of losing geographic significance in a landline number if it gave greater freedom to own a number 'for life' (e.g. if the person moved to another area and wanted to retain their number). Like a mobile number, a landline number becomes part of the person's identity, rather than it being tied to where they live. Many though, claimed that they did not really care either way, given that (i) a landline had little relevance or benefit, and (ii) it was not difficult to find alternative ways to locate people and businesses.

> *"I like the idea of a number for life. There are so many ways to find things now and so do we really need area codes?"*
> Jo, 17, mobile only user, Cardiff.

(See Section 5.3 and Section 5.4 for further details on participants' existing attitudes and behaviour with respect to area codes and location identity).

Most older participants in the sample strongly rejected the idea of losing geographical meaning. The general view was one of considerable 'pain' and confusion in the transition. This was given that area codes were so strongly established in people's minds, requiring too major and sustained an effort to get used to area codes no longer having any meaning. Some, particularly mid-life participants expressed a concern about the impact on vulnerable or potentially vulnerable people.

> *"It's very difficult for* [older] *people to lose the associations."*
> Betsy, 66, mobile and landline user, Belfast.

> *"Very disruptive. The current system is very clear and well organised."*
> Andrew, 50, mobile and landline user, Sheffield.

8.5 Keeping chargeable numbers as they are

Turning to non-geographic chargeable numbers, the first scenario presented to participants was one that described retention of the status quo, i.e., to simply keep chargeable numbers (084, 087 and 09) as they are.

Participants' views of this were very mixed with the main sample split by age.

Younger participants tended to accept the scenario. This was mainly because of the perceived ease of avoiding chargeable numbers and a strong preference to interact and transact with providers digitally. Younger people were also concerned to avoid a situation where charges would be recovered by providers in other, more direct ways.

> *"Don't need them. Don't use them."*
> Jonny, 17, mobile only user, Cardiff.

> *"Much better for companies to make money this way, rather than charging more for their product or service."*
> Sally, 21, mobile only user, Aberdeen.

Some younger participants argued the opposite, on behalf of others rather than themselves, i.e., older people (particularly their grandparents).

> *"There's a need for simplification and more information. Otherwise old people could get caught out."*
> Megan, 17, mobile only user, Cardiff.

Older participants, and the less digitally savvy, tended to reject the scenario, and wanted instead to see changes. The main driver of this was a preference or reliance on the phone, particularly in situations where there was a need for dialogue and personal interaction.

Many felt that if they were 'forced' to call a chargeable number in order to purchase a product or service (especially one that needed advice) the charge may act as a barrier to engagement. In any event, many were unhappy with the difficulty in knowing which numbers were chargeable (particularly between 080 and 084 / 087) together with a perceived lack of transparency. Many expressed a fear that people can be easily caught out, and forced to pay a charge (which was often assumed to be high, i.e., higher than the maximum call cost allowable).

> *"There are times when you have to call, or when you want to call."*
> Maureen, 78, landline only user, London.

> *"It's hard to know what these numbers actually cost. They have hidden charges."*
> Steve, 65, mobile and landline user, Wrexham.

> *"No, it's got to change. It's already confusing with 0800 and 08 whatever."*
> Dave, 46, mobile and landline user, Chipping Sodbury.

Some older participants tended to accept the scenario, believing that they knew enough to avoid chargeable numbers. Any change would mean having to re-learn ways to avoid their use.

> *"I hate change. I absolutely loathe change. I know what I don't know and it would be confusing to change it all."*
> Paul, 52, Mobile and landline user, Chipping Sodbury.

8.6 Abolishing 084 and 087 and 09 numbers

Finally, participants were presented with two alternative scenarios for abolition. One was to abolish 084 and 087. The other was to abolition all chargeable numbers, including 09.

In essence, the majority across the sample (including micro-business owners and other business users) were in favour of abolishing 084 and 087. Only a minority were in favour of abolishing 09 at this time.

Abolition of 084 and 087 was argued for by many participants on the basis of simplification and the reduction in confusion. As things stood, many claimed to be easily confused by freephone 080 and 084 / 087 as chargeable numbers leading to an increased risk of being charged unknowingly.

In all, many felt that simplification made it more likely that callers would be calling on the basis of an informed decision.

A minority was against abolition. Amongst some younger participants, the argument against related to fears that companies would seek to recover lost revenue in other ways, i.e., by adding to the cost of the product or service itself.

> *"If I'm calling to book a ticket to a concert, I don't want to pay extra for the ticket or the booking fee. Companies are going to want to make money some way or another. It's cheaper to keep the premium number because I would buy online."*
> Julie, 20, mobile only user, Belfast.

Some older participants were also against abolition. The concern was that change could add to the confusion and risk of being inadvertently charged. They currently felt that they knew enough about chargeable numbers to be able to avoid them.

The idea of abolishing 09 was rejected by many. The argument for this was based on the knowledge that 09 was used by high profile broadcasters for the purposes of phone competitions and voting.

Across all age groups in the sample, people had difficulty envisaging how voting and phone competitions could be possible without the use of a premium rate number. Others felt that one premium number was important to keep, as a convenient, relatively low-cost way, to pay for goods or a service that was valued in some way.

Finally, some participants wanted all chargeable numbers to be abolished, given a belief (or expectation) that providers can and should innovate to charge in other ways.

> *"You can vote using an app and don't need to use the phone. There are other ways for companies to make money – like with advertising."*
> Davy, 19, mobile only user, London.

9. Summary of suggested changes, from the participants' perspective

Taking the broad majority's views into account, and on balance, the consumer perspective suggests the following changes to UK telephone numbering:

In the short to medium term: closure of local dialling in all areas, the abolition of 084 and 087, and retention of 09.

In the longer term: loss of geographical significance, as landline usage continues to decline, and the abolition of 09, as alternative micro-payment technology (and its usage) develops or evolves.

10. Appendices

Contents:

Appendix 10.1 – The participant pre-task

Mobile and Landline Phone study

Tell us, below, a little about your use of your mobile phone and landline (if you have one) for making and receiving calls, texts and messages.

Please be sure to fill in this questionnaire before you attend the session. Please bring this along with you. Thank you!

Your name: _____

About your use of your mobile phone

(if you don't use a mobile phone, please skip this section and go to Q5)

Q1. Thinking about your mobile phone service, which one of the following statements applies to you?

		PLEASE TICK ONE BOX
A	I am in a contract that includes the cost of my phone / handset	❑
B	I am in a SIM-only contract i.e. it does not include the cost of a handset	❑
C	I use Pay as You Go	❑
D	Other (please specify) _____	❑

Q2. How much does your mobile phone service normally cost per month? (If you are not absolutely sure, please make an estimate)

£_____ per month

Q3. How much do you use your mobile for each of the following? Please think about your use (personal and/ or business) across an average week (If you are not absolutely sure, please make an estimate):

The number of UK and international calls you make from your mobile to other mobile numbers, across an average week:

None	1-5	6-10	11-20	21-50	50+
❑	❑	❑	❑	❑	❑

The number of UK and international calls you make from your mobile to landline numbers, across an average week:

None	1-5	6-10	11-20	21-50	50+
❑	❑	❑	❑	❑	❑

The number of calls you make over the internet e.g. via Skype, Facetime, WhatsApp, etc., across an average week?

None	1-5	6-10	11-20	21+
❑	❑	❑	❑	❑

The number of SMS texts and MMS messages (pictures, video clips, etc.) you send (using your network operator's service, not via WhatsApp or other online message services), across an average week?

None	1-10	11-20	21-50	50+
❑	❑	❑	❑	❑

The number of instant messages you send over the internet (e.g. via WhatsApp, Snapchat, Facebook Messenger or other online message services or apps), across an average week?

None	1-10	11-21	21-100	101-500	501-1,000	1,000+
❑	❑	❑	❑	❑	❑	❑

Q4. Across an average month, how much data do use on your mobile? (If you are not absolutely sure, please look it up on your phone if possible. If you really don't know, please say so):

None	Less than 1Gb	1-2Gb	3-5Gb	6-10Gb	11-20Gb	20GB+	Don't know
❑	❑	❑	❑	❑	❑	❑	❑

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About your use of a landline phone

(if you never use a landline for making calls, please go to the end)

Q5. How much do you use a landline phone for each of the following? Please think about your use (personal and/or business) across an average week. (If you are not absolutely sure, please make an estimate):

The number of UK and international calls you make from a landline phone to mobile numbers, across an average week:

None	1-5	6-10	11-20	21-50	50+
❑	❑	❑	❑	❑	❑

The number of UK and international calls you make from a landline phone to other landline phone numbers, across an average week:

None	1-5	6-10	11-20	21+	50+
❑	❑	❑	❑	❑	❑

Thanks! That's it. Please bring this along with you to the session.

Appendix 10.2 – Access and service charges shown to participants

	Access charge (made by your phone company to connect your call)		Service charge (made by the organisation you are trying to call)
	Landline	**Mobile**	
084 numbers: (e.g., 0844 335 1993)	Some examples: **Sky:** Up to 11.5p per minute **BT:** Up to 13p per minute **TalkTalk:** Up to 10.5p per minute	Some examples: **EE:** Up to 45p per minute **Vodafone:** Up to 55p per minute **Tesco:** Up to 25p per minute	Up to 7p per minute or per call
087 numbers: (e.g., 0870 673 2354)			Up to 13p per minute or per call
09 numbers: (e.g., 0906 879 9123)			Up to £3.60 per minute and / or £6.00 per call

Appendix 10.3 – The six potential future scenarios shown to participants

1. Local dialling is closed in six areas of the UK and may, in the future, be closed in additional areas

- In most areas of the UK, if you want to call someone in your area, you don't need to dial the area code. For example, instead of dialling 01242 234567, you can dial 234567.
- In the future, local dialling may be closed in additional areas. (This allows for more numbers to be created in areas that are running out). For example, in the 01242 area, instead of dialling 234567, you would need to dial 01242 234567.
- Also, in the future, individual phone companies may be allowed to decide on whether or not to provide local dialling. For example, BT might decide to withdraw the ability to dial the local number without the area code, while Sky might continue to provide this way of dialling local numbers.

2. Local dialling is removed from all area codes

- In most areas of the UK, if you want to call someone in your area, you don't need to dial the area code. For example, instead of dialling 01242 234567, you can dial 234567.
- In the future, local dialling may be closed in **all** areas of the UK. For example, in the 01242 area, instead of dialling 234567, you would always need to dial 01242 234567.

3. Area codes lose their geographical meanign altogether

- Currently areas codes usually indicate where you live in the UK. 020 means that you live / work in London, 01242 means that you live / work in Cheltenham.
- In the future, area codes will gradually lose their association with the area. Nobody would need to change their current number, but new numbers could be provided from anywhere in the country.
- For example, a person living in Brighton (area code 01273), may be given a number from Worthing (the adjacent area code 01903).

4. For non-geographical numbering, everything stays largely the same

- Typically, non-geographic codes are used by business and public services and are not tied to a specific area. They vary in their cost of calling.
- Numbers starting with 03 are the same cost as 01 and 02 landline numbers (and are included in any relevant call bundles).
- Numbers starting with 08 are either free (e.g., 0800 or other 080 numbers) or if starting with 084 or 087 attract a surcharge of up to 13p per minute or per call to pay for the service being provided.
- Numbers starting with 09 may be higher in cost and include a surcharge of up to £3.60 per minute or £6 per call. These 'premium-rate' numbers are usually for TV voting and competitions, where the cost of the call pays for the service provided.
- Companies are required by regulation to state the charges for the call next to the number
- In this scenario, there would be no plans to make any changes to these numbers or their cost, although the service charge limits might change in the future.

5. Non-geographical numbers beginning with 084 and 087 would be abolished

- Typically, non-geographic codes are used by business and public services and are not tied to a specific area.
- Numbers starting with 084 or 087 attract a surcharge of up to 13p per minute or per call to pay for the service being provided.
- In the future, the businesses would need to replace their 084 or 087 number with either a 01, 02 or 03 number.
- Calls to 01, 02 or 03 numbers would be charged at the standard geographic rate. These numbers are cheaper to call than an 084 or 087 number and the call may be included in bundles of minutes.
- However, what this might mean is that the company in question recovers their costs in another way. For example, if you are calling a ticket booking office, the booking fee may increase.
- Freephone 0800 / 0808 would be retained.

6. Non-geographical numbers beginning with 084 and 087 and 09 would be abolished

- Typically, non-geographic codes are used by business and public services and are not tied to a specific area.

- Calls to these numbers vary in their cost. Numbers starting with 084 or 087 attract a surcharge of up to 13p per minute or per call to pay for the service being provided. Numbers starting with 09 are higher in cost and include a surcharge of up to £3.60 per minute or £6 per call.

- In the future, all of these numbers, 084, 087 and 09 may be abolished. This would mean that service providers would need to change to a 01, 02 or 03 number and, charge for their service (if they wished to) in some other way, e.g. credit card.

- Calls to 01, 02 or 03 numbers would be charged at the standard geographic rate

- Freephone 0800 / 0808 would be retained.

Appendix 10.4 – Copy of participant consent form

Riverside House
2A Southwark Bridge Rd
London SE1 9H

Taking part in research

Thank you for considering taking part in this research project, which is being conducted by Futuresight, on behalf of Ofcom.

The information we collect throughout this project will be kept anonymous and your confidentiality will be preserved. Your personal details will not be shared.

Futuresight will not give details of your identity to Ofcom or any third party. You can access our privacy notice on our website at: www.futuresight.co.uk (We will send you a paper copy of this notice on request).

You have the right to withdraw your consent to process the information you provide or object to our processing of your information. The research activity and this interview will be conducted in accordance with the Market Research Society Code of Conduct, and the information you provide will be treated in accordance with data protection law.

If you agree to be in a video, it will be viewed by the Futuresight and Ofcom project team, for the purpose of analysing the comments all participants have made. Video and audio recordings and clips or stills may be used by Ofcom in-house publications and presentations, for the purposes of showing the results of our research. The video clips would be held by Futuresight and Ofcom for a maximum of 3 years, and then securely deleted.

If you have any questions about the way your personal information is handled, please feel free to ask a Futuresight researcher in person, or telephone or email us (see below).

Please tick each box if you agree

To take part:
I understand that my participation in this research project is voluntary and ☐
that I am free to withdraw at any time, without giving any reason.

Video and audio recordings:
I give permission for video and audio recordings collected as part of ☐
the research project to be viewed by all members of the project teams
at Futuresight and Ofcom.

I give permission for quotes and image stills from video recordings collected ☐
as part of the research project to be used in publications and presentations.

I agree to take part in the above research project.

_____   _____   _____
Name of Participant   Date   Signature

With thanks.
Simon Ashworth
Director

Telephone: 020 7700 2277