



Review of Number Porting

Expectations and Experiences Among Residential and Business Consumers

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1. Background to Research

1.1. Research Objectives

This research was commissioned to further Ofcom's understanding of the way that residential and business consumers perceive and experience the number porting process, and to help inform the decision on whether and how this process might be improved.

More specifically, the project was required to fulfil the following more specific research questions:

- To understand what value consumers place on being able to keep their number when switching between mobile operators
- To explore and understand the extent to which *the existing process* affects end user choice when considering switching and porting:

Probing both audiences on:

- Levels and types of interaction with providers (particularly the existing provider) when switching or considering switching.
- The impact of retention strategies by the existing operator on the decision to switch or port.
- The step by step experience of the porting process.

Probing Residential consumers on:

- The benefits and risks associated with a recipient led porting process and its impact on the decision to switch or port.

- To explore and understand the extent to which *the current port lead time* affects end user choice when considering switching and porting:

Probing both audiences on:

- The appeal of, and level for, a one off payment to complete the porting process within a shorter time frame.
- What factors make the time taken to port an issue and impact on the decision to switch or port.

Probing Business consumers on:

- The importance of porting time vs. certainty when porting numbers in bulk.

This research was essentially an exploratory project and was therefore qualitative in nature. It was therefore beyond the scope of the research to measure the extent to which number porting is a relevant issue among Residential or Business consumers. This was assessed quantitatively via a separate omnibus exercise.

1.2. Research Approach

Within each of the two key audience groups (i.e. Residential and Business consumers), four core groups of interest were identified:

- Those who have switched in the last two years and ported at that time
- Those who have switched in the last two years but did not port at the time
- Those who have considered switching in the last two years but did not actually do so

- Those who are currently considering switching.

A slightly different methodological approach was adopted for each audience in order to reflect their respective situations. These approaches are described in turn below.

1.2.1. Residential Consumers

Mini-groups

In order to fully explore the issues around number portability among consumers who have either switched or considered switching in the past two years, a series of six mini-groups were conducted across two locations (London and Nottingham). This approach provided the discursive benefits of a group discussion, while at the same time providing sufficient opportunity to explore each individual's circumstances and decision-making process.

Specifically, this element of the research comprised:

- Two mini groups (each comprising 4-5 respondents, each lasting up to 1.45 hours) with each of the following audiences:
 - TYPE A RESPONDENTS) Consumers who have switched network provider in the last two years and ported their prior mobile number
 - TYPE B RESPONDENTS) Consumers who have switched network provider in the last two years but did not port their prior mobile number
 - TYPE C RESPONDENTS) Consumers who have seriously considered switching in the last two years but did not go ahead (defined by someone who started to look around, called up their own mobile company to switch but then changed their mind or went onto a better package with their own company)
- A minimum of two respondents on pre-pay mobile and two on a contract within each group.
- A fairly even representation of the four key providers (O2, Orange, Vodafone and TMobile) across the groups.
- All to use their mobile phones regularly and to regard them as one of the main ways to keep in touch with a fairly wide calling circle of friends and family.
 - Including a mix of those who use their mobile as their main form of communication (make most of their calls from their mobile rather than their fixed line phone) and those who divide their calls more evenly between their fixed line and mobile phone.
- A mix of ages and social grades, as follows:

	London	Nottingham
Group A	ABC1/aged 18-35	C1/C2/D aged 36+
Group B	ABC1/ aged 36+	C1/C2/D/aged 18-35
Group C	C1/C2/D aged 18-35	ABC1 aged 36+

Mystery Shops

In order to understand how expectations of the switching/porting process compare to the actual experience, and the "live impact" of the number porting process on decision making, a more ethnographic approach was adopted. The following research approach was used among consumers who were considering switching (within the next month) but had not yet done so:

PART A:

An initial depth interview with consumers who were in the market to switch network providers, in order to explore and understand their ongoing issues and concerns relating to the overall switching process as well as number porting itself (unprompted at this stage to avoid influencing perceptions or behaviours).

PART B:

This was followed by a 2-4 week diary exercise where consumers were asked to document their experiences, actions and reactions during the switching process - in particular, how each "information event" impacted the way they feel about switching/porting. In order to ensure that the process was as natural as possible, consumers were encouraged to go at their own pace, and were not required to switch or port if they decided against this. To ensure they were serious about switching providers, rather than simply using the research as a means of negotiating for a better deal with their current provider, respondents were screened against a pre-agreed set of criteria (see Appendix).

PART C:

At the end of this period a follow-up depth interview was conducted in order to explore actual experiences and how these impacted decision-making. At this final stage the impact of the current porting process and current port lead times on the decision to switch/port could be fully explored in a prompted dialogue.

Specifically, this element of the research comprised:

- Six mystery shops, split evenly between the two locations.
- All respondents to be seriously considering switching network providers, with a plan to make the decision within the next month.
 - They were included if they had started to look around and think about providers but excluded if they had actually made any calls to their existing provider to get the process moving.
- A minimum of two respondents on pre-pay mobile and two on a contract.
- A fairly even representation of the four key providers (O2, Orange, Vodafone and TMobile) across the interviews.
- All to use their mobile phones regularly and to regard them as one of the main ways to keep in touch with a fairly wide calling circle of friends and family.
 - Including a mix of those who use their mobile as their main form of communication (make most of their calls from their mobile rather than their fixed line phone) and those who divide their calls more evenly between their fixed line and mobile phone.
- A mix of ages and social grades across the interviews.

1.2.2. Business Consumers

SMEs are not a homogenous audience and their needs in relation to mobile phones and network providers vary according size, sector and the type of personnel they are purchasing phones on behalf of - for example, whether mobile phones are an essential sales tool for a sales force that is on the road or a 'perk' for office based staff.

In order to accommodate this diversity, a series of ten depth interviews were conducted with SMEs employing 2-250 staff. Interviews in the London/SE area were conducted in person, those further a field were conducted by telephone - each lasted up to 45 minutes.

Specifically, this element of the research comprised:

- A minimum of two depths in each of the following groups:
 - TYPE A RESPONDENTS) Businesses that have switched network provider in the last two years and ported their prior mobile number
 - TYPE B RESPONDENTS) Businesses that have switched network provider in the last two years but did not port their prior mobile number
 - TYPE C RESPONDENTS) Businesses that have seriously considered switching in the last two years but did not go ahead (defined by someone who started to look around, called up their own mobile company to switch but then changed their mind or went onto a better package with their own company)
 - TYPE D RESPONDENTS) Businesses that are seriously considering switching in the next couple of months and to have started looking at/researching alternative provider offerings
- ‘Stage’ in the mobile phone switching process was interlocked with the number of mobile phones owned by the company (as an indicator of the importance of mobiles to the business), as follows:

	Number Of Mobile Phones Owned By Company			
	Total	Up to 10	11-25	26+
Group A	3	1	1	1
Group B	3	1	1	1
Group C	2	1		1
Group D	2		1	1

- All consumers required to:
 - Be the person in their organisation responsible for their company’s telephone services (including their mobile phones) - with an even mix of non-dedicated owner/MDs in small companies and dedicated IT specialists in medium sized companies, and a corresponding mix of SMEs with up to and over 100 employees.
 - Run and own their mobile phone contracts (excluding companies who outsourced all IT and communication decisions to a third party).
 - Purchase mobile phones/contracts for their employees (as opposed to just paying their bills).
- At least two interviews in each of the following four spend bands:
 - £1K or less, £2-5K, £6-10K, More than £10K
- A mix of white collar services, blue collar manufacturing/trade and retail industries across the interviews.
- A fairly even representation of the four key providers (O2, Orange, Vodafone and TMobile) across the interviews.

2. Executive Summary

The following section summarises the key learnings from the research against the primary research objectives.

Objective 1: To understand what value consumers place on being able to keep their number when switching between mobile operators

The value that consumers place on keeping their mobile phone number varies: there are those (Residential and Business consumers) who actively want to change their number, those who would ideally like to keep their number as long as it's relatively easy to do (Residential only) and those for whom their number is something they will go out of their way to keep (Residential and Business consumers).

For residential consumers the benefits are as much emotional as practical. These consumers build an attachment to their number based on having had it for a long time, the fact that a large number of people have that number, and/or the fact that it is easy to recall. Either way, their number can become an intrinsic element of their identity and losing it can equate to losing touch or missing out. The strength of emotional attachment typically relates to the extent to which they use their mobile phone as their main phone, how they feel about keeping in touch and the breadth of their calling circle.

Among this audience the practical benefits of keeping their number tend to emerge in relation to business networking - among residential consumers who use their personal phone for business purposes and have given the number out to their clients or customers. These users represent a middle-way between residential and business consumers. In addition, there can be practical issues around giving out their mobile number to organisations which may need to get in touch with them and are harder to remember to update than personal contacts (e.g. doctors, schools, banks, and so forth).

For business consumers the benefits are primarily practical: if they are working in a business where mobiles are used to communicate externally (i.e. with clients / customers) then keeping the number is essential for business continuity. If mobiles are only used to communicate internally there is little value in keeping the number. The only exception to this is in very small businesses where there is a high degree of consumer cross over in mobile attitudes and behaviours.

Objective 2: To explore and understand the extent to which the existing process affects end user choice when considering switching and porting

There is little evidence to suggest that the current process has a significant impact on switching behaviour. Those Residential and Business consumers who place a high value on keeping their mobile phone number are typically prepared to put up with the short term hassle and do "whatever it takes" to port when they switch.

However the porting process is not typically perceived or experienced as an example of good customer service by either Residential or Business consumers and therefore becomes an additional layer of hassle in the entire switching process.

Although the decision to switch is generally unaffected by this, the hassle associated with porting can contribute to a general feeling (at least among Residential and smaller business consumers) that it is easier to stay put if they are prepared to negotiate a better deal. Only in a minority of instances was the porting experience sufficient to put Residential consumers off

switching - or switching again in future. However, among those who would ideally keep their number, but only if it is easy to do, difficulties associated with porting can be the deciding factor in the decision to keep their number or not, even if the decision to switch is unaffected.

For Business consumers, anxiety around the porting process can be exacerbated by the greater level of risk associated with things going wrong, or not happening as they are supposed to. This means that the reasons for switching have to be sufficient to justify exposing the company to this risk. Again, although the decision to switch is generally unaffected by this, it is not something that is undertaken lightly when number porting is a non-negotiable part of the process.

Residential consumers (who have not switched provider before/recently) often become aware that they can port after being informed by their new provider and are therefore relatively unplanned in the way they go about the process - finding out what they need to do as they go along. Business consumers plan in advance, as might be expected given that they are porting in bulk, and tend to be more knowledgeable and confident about the entire process. In fact many would be comfortable, and may even prefer, to do the entire thing online or by email. Only frequent switchers would feel the same way in the Residential market.

The two audiences are quite different when it comes to the impact of the retention strategies that are frequently employed by existing network providers. Among Residential consumers there are mixed views as to whether these represent an opportunity or a source of additional stress or discomfort - many would prefer to avoid conversations with the retention team if given the choice. Among Business consumers, those who are leaving in order to improve their package or deal are typically happy to give their existing provider the opportunity to match this. Businesses that are leaving because they have had problems with their existing provider (e.g. poor customer service or coverage issues) have already made their decision to leave by the time they call to request their PAC codes - and accept that the network can do little to retain them.

Although moving to a recipient led process has the potential to be seen as a significant improvement by Residential consumers, and more in line with their expectations of how the process would work, it would not have a major impact on the decision to port. In other words there is little evidence to suggest that it would encourage porting among those who did not / would not care to keep their number. Furthermore, a move to this type of process would only be deemed an improvement if the network providers were required to meet certain performance standards - there is a level of mistrust among many Residential consumers that the network providers would successfully complete the process and many fear losing control over the process if something goes wrong.

Objective 3: To explore and understand the extent to which the current port lead time affects end user choice when considering switching and porting

The amount of time taken to port contributes to the sense of the process being a hassle among both Residential and Business consumers but it tends to be more an irritant than a practical issue. Those who place a high value on keeping their mobile phone number are typically ready to adopt strategies to cope with a transition of up to five days. For example, Residential consumers may reduce the impact of port lead times by overlapping contracts or carrying two phones. Business consumers may 'control' or manage the process by holding back the distribution of new phones until the porting process is complete or distributing them on a Friday afternoon to allow the transition to happen over the weekend - others automatically overlap contracts as part of the switching process. However, two days is seen as a more acceptable

timeframe, particularly in the context of the “immediate” switchovers available in other markets (utilities and banking for example). The shorter the timeframe the more in control of the process people feel, simply because there is less time for things to go wrong and less time to wait until they are up and running (and able to forget about it).

It follows that there is little evidence that consumers would be prepared to pay to speed up the porting process. In fact the very idea that it is possible to pay for faster service suggests it is technically feasible to do, and therefore raises questions about why it isn’t provided as a universal service improvement. Only a small number of Business consumers are willing to pay, and only a nominal amount, however they would still resent having to do so as a matter of principle.

Certainty is at least as important as the port lead time in the overall porting process, if not more so. Having a fixed date and allotted time period (e.g. ideally a two hour time slot in either the morning or afternoon) for the switchover enables planning and is felt to reduce the chances of losing service – providing consumers with a way to retain (or regain) control in the process. This is particularly important for Business consumers with multiple users, given the heightened sense of risk they associate with the process as a result of having to switchover in bulk. However there is evidence to suggest that Residential consumers would also appreciate greater certainty in the process.

Timing becomes more of an issue with regard to receiving the PAC code, which is where most problems tend to occur, particularly for Residential consumers. In this context consumers are looking for a fast, efficient and reliable method for receiving their PAC code. Most therefore wish to avoid postal options. Residential consumers are open to most other methods. For all but the smallest Business consumers, email/internet is felt to be the most suitable means of both requesting and receiving PAC codes as it provides a paper trail.

It is also important to note that problems can bring down the reputation of the communications industry as a whole, contributing to a sense of distrust of the network providers.

It did not occur to anyone to contact Ofcom regarding their porting problems. Awareness of Ofcom was limited and even those who knew Ofcom as a regulator were not aware they could contact Ofcom as an individual. Added to this is a feeling that while the porting process is onerous, this is ‘just the way it is’. Furthermore, most consumers wouldn’t know if the process was not working, as they don’t know any better. This fosters a sense of resignation that inhibits complaint.

3. The Role of Number Porting in the Decision to Switch

3.1. Number porting in the context of the motivations and barriers to switching

When making the decision on whether or not to switch, consumers are motivated by a number of “push” and “pull” factors:

- Push factors

In other words, the issues that drive consumers away from their existing network provider as a result of poor experiences: typically in relation to performance/coverage, customer service or the sense of not being on the best deal.

- Pull factors

In other words, the issues that attract consumers towards a new network provider: the promise of the benefits that might be gained either in relation to performance/coverage, customer service, the deal or package, or indeed the phone/technology itself (particularly where a certain model is only available on a certain network e.g. the i-phone).

However there are also numerous barriers that consumers take into account in their decision-making process and the benefits of switching must be seen to out-weigh these “costs” in order for a switch to be made:

- Inertia:

The belief that there are few savings to be made (because there is not much differentiation in the market) and/or a reluctance to devote time to the task (perhaps a function of being too busy or the relative priority assigned to their mobile phone overall).

- Lack of knowledge/confidence:

Uncertainty about how to go about the process or what is even possible.

- Effort required:

The hassle associated with researching the options available, comparing between deals to find the best one, changing bank details and sorting out billing, the emotional burden of having to call to cancel the old contract and potentially getting involved in an unwanted conversation with the retention team etc. Number porting or communicating a new number is simply another one of these hassle factors.

3.2. The value consumers place on their mobile phone number

The value consumers place on keeping their mobile phone number is driven by a number of different factors that vary by audience. These are detailed in the following sections.

3.2.1. Residential consumers

Residential consumer attitudes towards porting are driven by:

- Attitude towards change:

Those that see switching as an opportunity to start afresh (“cleansers”) are less attached to their mobile phone number than those that are keen to maintain links because they are concerned about losing touch or missing out (“hoarders”).

- Reliance on mobile phone:

Those who use their mobile phone as their primary means of communication (and who

typically have wide calling circles) are more attached to their mobile phone number than those who use their phone alongside their landline phones.

- Age:
Younger consumers (particularly female consumers) tend to have a stronger desire to be continually in touch and are therefore more attached to their mobile phone number than older consumers who are less demanding communicators
- Type of contract:
Those on contracts are typically heavier users, with larger calling circles, and are therefore more attached to their mobile phone number than those on PAYG, who rely less on their mobile phone as a means of communication.
- Cross over with business use:
Residential consumers who also use their personal phone for business calls (for example those who are self-employed) can have issues around maintaining contact with their customers. In this situation they can behave more like small businesses and do not want to give up their mobile phone number for fear of losing business.

These factors combine to create three overarching typologies in terms of the value placed on keeping the mobile phone number: those who are “not bothered” about keeping their number, those who would ideally keep their number but only if it is easy to do so, and those for whom keeping their number is very important. Taking each of these in turn...

(a) At one extreme, there are those who are *not really bothered about keeping their mobile phone number*. These Residential consumers tend to be less reliant on their mobile phone and have smaller calling circles, making it easier for them to communicate a new number to their key contacts. In fact some may actively seek to change their number in order to regain control over it - creating an opportunity to start afresh and change their identity by clearing out old/obsolete contact details and avoiding unsolicited telemarketing.

(b) At the other extreme, there are those for whom porting is a fundamental part of the switching process - in other words they *would not switch if they couldn't also port*. These consumers will retain their number even if the process turns out to be a stressful or painful. Those who fall into this category tend to either be emotionally attached to their number (if there is a concern about losing touch / missing out because their number has become part of their identity - younger, female users) or practically attached to their number (if their mobile is their primary means of communicating, if they have a particularly wide calling circle, or if they use their phone for business calls).

(c) Somewhere in-between are those Residential consumers for whom their *mobile phone number is just a “nice-to-have”*. These consumers like the idea of keeping their number (to maintain avoid losing touch or to avoid having to update their calling circle). However they recognise that this is an emotional rather than practical need.

When deciding whether or not to port, on the one hand, Residential consumers are taking into account the costs of changing their number:

- Need to inform the calling circle: the wider the calling circle, the greater the cost
- Possibility of losing touch: acknowledging that calling circle members may not update their contacts or may miss the message

- May forget to inform key institutions and miss out on important information: if their mobile is their main contact number this cost is far greater
- May lose contact with a client or customer / lose a sale: this cost only exists if mobile doubles up as a business phone (primarily for those who are self-employed)
- Don't want to lose a "good" number: if the number is particularly easy to remember or if they have had the number a long time, the cost is greater.

On the other hand, Residential consumers are taking into account the costs of keeping their number:

- Hassle factor: particularly if things don't happen as they are supposed to
- Potential loss of service: first time porters are not always sure what exactly will happen during the switchover and are afraid of being without their old number for any period of time
- Cost: those on contracts will consider overlapping the old and new contract to manage the transition but this is an expense that has to be taken into account
- Complexity: first time porters can perceive the process as being complicated, depending on how it has been explained to them.

3.2.2. Business consumers

Business consumer attitudes are driven by:

- Dedicated IT function:
Company size in terms of number of employees is important in that it influences whether or not the company has dedicated personnel to deal with communications issues. Large companies are more likely to have an IT manager looking after their mobile phone contracts, someone whose job it is to manage the switching processes and ensure it goes smoothly, without loss or interruption of service. This effectively reduces the risk of losing business continuity.
- Size:
In fact the number of mobile phone users is more important than the number of employees, but measured in this way, size has a critical impact. Businesses with a large number of users are likely to have account managed relationships, which reduces the burden of work associated with managing their contracts and again reduces the risk associated with switching.
- External/internal communication needs:
Those businesses that rely on their mobile phones to maintain client / customer relationships place a considerably greater emphasis on keeping their mobile phone numbers than those who are only using mobiles to keep in touch with the office.
- Reliance on mobile phones:
Those businesses that would struggle to function without their mobile phones (e.g. mobile workforce based 'on the road') are more attached to their mobile phone numbers than those for whom they are just another means of keeping in touch (e.g. office based workforce).
- Technology demands:
Some businesses switch to gain access to improved product technology or functionality and are willing to accept a degree of pain in order to achieve this - in other words they can display a higher tolerance for any hassle associated with porting mobile phone numbers.

Requirements tend to be more polarised in the business market and as a result these factors combine to create just two overarching typologies in terms of the value placed on keeping the mobile phone number: those who are “not bothered” about keeping their number(s) and those for whom keeping their number(s) is very important. Taking each of these in turn...

Businesses who are **not really bothered about keeping their mobile phone number** are similar to Residential consumers in that they see an opportunity to ‘lose’ unwanted sales calls and don’t see major costs associated with changing their number(s). They are also keen to minimise the risk involved in switching and see porting numbers as an unnecessary “headache” with little business benefit. These businesses tend to have fewer mobile phones and/or tend to use them principally for internal rather than external communication, and are generally less reliant on mobile communication.

At the other extreme are those businesses for which porting is an imperative, who **would not switch if they couldn’t also port**. Those who fall into this category do so primarily because of a practical attachment to their mobile phone numbers, driven by a need for business continuity: they cannot risk missing a sale or losing contact with their customers or clients. The larger the business, the higher the risk, as the practical implications of switching become more complex. There is the additional financial disincentive of having to re-print stationery. Businesses that do not have client facing staff tend not to fall into this category unless they rely heavily on being contactable (e.g. mobile workers). Emotional drivers play a lesser role among Business consumers, with the exception of very small businesses who think and behave more like Residential consumers.

It follows that Business consumers tend to make the decision to port at the same time as the decision to switch - they effectively plan for the pain if they need to keep their numbers and will be unlikely to change their mind during the process, regardless of how difficult it might be.

When deciding whether or not to port, on the one hand, Business consumers are taking into account the costs of changing their number:

- May lose contact with a client or customer / lose a sale: only a cost if mobiles used to manage/maintain client relationships
- Need to inform external contacts: only a cost if mobiles used to manage/maintain client relationships but can be time consuming depending on how wide the external calling circle is
- Need to reprint stationary: only a cost if mobiles used to manage/maintain client relationships but can be a major expense depending on the number of mobile phone users
- Need to inform internal teams: relatively low cost as simply involves issuing new phone lists.

On the other hand, Business consumers are taking into account the costs of keeping their number:

- Risk of downtime: particularly if mobiles are business critical
- Resource required to manage the process: depends on the number of mobiles and whether or not the business has dedicated IT support and/or an account managed relationship - those with more than five mobiles who are not big enough to have an account manager or dedicated IT support bear the greatest burden here
- Cost: likely to overlap the old and new contract to manage the transition but this is an expense that has to be taken into account.

The decision on whether to port is ultimately a trade off between the costs of keeping the number and the costs of changing the number. For Residential consumers this decision tends to be more emotionally based, driven by attitudes towards being in touch and the role the mobile phone plays in their life. For Business consumers this decision tends to be more practically based, driven by the need to remain in contact with clients and customers.

3.2.3. The monetary value consumers place on their mobile phone number

Both Residential and Business consumers find it very difficult to place a financial value on their number and the idea of being paid to change their number caused confusion.

“Why would they want to do that? Surely it’s simpler for them to sell you a phone with a new number? It must cost them to sort out the old number.”

“I can’t answer this. I don’t understand why they would do this.”

However with careful explanation it is possible to elicit some response. Among Residential consumers there is seen to be some logic in being compensated for not ‘costing’ the network provider by porting (rarely did they relate the payment to being compensated for spending their own time managing the switchover to a new number). For Business consumers the concept could cause irritation – it can hardly be that difficult for them to allow you to keep your number.

Regardless of their attitude towards the principle of being paid to change their number, behaviour tends to remain unchanged: consumers for whom it is important to keep their number will tend to port regardless of the amount offered not to port. The only discernible shifts are among Residential consumers who would ideally port but only if it is easy to do so, as documented below.

(a) Those consumers who are “not bothered” about keeping their mobile phone number and would tend not to port anyway, are likely to place a low financial value on their number (between £5 and £25), if they can place any value on it at all. In fact many would not feel comfortable accepting payment from their new provider for doing something they were going to do anyway.

“A bit of credit on the account? I don’t put that much importance on my number so I’d probably switch it anyway.”

“£5, but then you’d spend £10 texting everybody the new number!”

“£10, I’m easily bought.”

“I think it would be nice if they gave me a month off my line rental as it must be saving them money.”

“I suppose we should get money back, however much it costs them to switch – I did not think about it.”

“They should give you free texts for the first month to cover the cost of letting everyone know.”

(b) Those Residential consumers who would keep their number but only if it was relatively easy to do so place a slightly higher financial value on their number (between £25 and £100).

“£25 might be a turning point.”

"I guess they should pay you some money, if they had to pay you they may make it easier to keep your number - it is not in their interest to do so now. I am not sure how much £30-£40?"

"I did it without being paid, so any amount would be nice. I am not sure what it is worth to me £50?"

"If you put it in terms of what is my number worth to me, it is hard to place a value on it but I suppose I could be persuaded for £50-£70."

"I could be 'bought' for £100!"

"I find it hard to think about my time like this, if I had really needed my number I probably would have stuck it out. Maybe a month or two off your bill would be fair."

(c) Those consumers for whom keeping their number is imperative would have to be paid a considerably higher amount to change - although for most (particularly Business consumers concerned with maintaining business continuity) there was no amount high enough to make them change their mind about porting.

"Up to £100 to offset the printing costs of new stationery."

"£100? They'd have to pay me a lot! But I suppose they'd just increase the cost of your contract if they did that."

"A one off payment of £100? But in reality I probably would still not do it. I have old friends who only get in touch once a year, and your number is personal to you."

"I would not do it for £200 but £500 yes."

"£500 and even then I am not sure I would."

"I would do it for £1,000!"

"I've got a really easy number so it's priceless."

"It's not worth it, even for a month's rental."

"I would not switch to a new number even if I was offered a payment."

"They'd never be able to pay me enough to give up our (BUSINESS) numbers - the value of retaining them is priceless."

4. Expectations of the porting process

Expectations of the porting process are largely driven by prior experience (if relevant) but 'hearsay' can also play a significant role, particularly for first time porters.

First time porters obviously have a limited understanding of how the process works and will base their expectations either on what they know from their own switching experiences in other industries (such as utilities or banking), or on the number porting experiences that their friends and family have gone through.

The "immediate" switchovers that tend to take place when switching energy suppliers, or bank, give rise to a belief that number porting should be fairly quick and easy. They also trigger expectations of a recipient-led process.

However 'hearsay' on the actual number porting experience can send expectations in the other direction - many had heard bad stories about loss of service, difficulties getting PAC codes, or long lead times, which caused them to anticipate a degree of stress and hassle in the process. Sometimes perceptions are based on out-of-date information about what is involved. There is also a general expectation, particularly among Business consumers, that any such transition between suppliers will involve a degree of risk that things will go wrong.

"I've heard from friends that have had problems getting their number changed - they've had gaps in their service."

"I assume it would be hard to do based on the experience my mum had. You have to get a code and give it to your new provider, it's not instantaneous and you could be "off" (without your old number) for a week like she was. I'm not sure if it was just bad luck or standard process but either way it's not very convenient."

"It used to cost £60 and take 90 days to swop over - you've got to have a different number for all those weeks. It's stayed in my head from when I used to work in a telephone company and I just think it's pointless to go through all that effort."

Sometimes the network providers themselves exacerbate these misgivings by failing to ensure that consumers fully understand the process, or that their expectations are properly managed. This can potentially put consumers off porting, particularly Residential consumers who tend to be less knowledgeable about/confident in the process.

"I wanted to keep my number but [X] told me I could lose my number completely for up to a week during the transition. If that number cuts out before it gets transferred it would be a problem. It's being sure that's going to happen."

"I assumed that it would be quite simple, that I would have the new phone number immediately. My new provider asked me if I wanted to keep my old number and I said yes, but they didn't tell me about the actual process."

"It was fairly straightforward but my existing provider made it sound more difficult than it was - referring to PAC codes - for someone who is not good with technical things it makes you think 'what are they talking about - can I do this?' when in fact it's just a phone call."

"They told me in the [X] shop that if I switched to someone else I would have to give 30 days notice, even though my current contract had expired, and that they would recommend I phoned up and got my PAC towards the end of this time and then it would

be sent out in the post and I would only have a week to use the PAC. This all sounded quite complicated in terms of managing the timing which put me off a bit. Surely if I am out of contract I could leave when I want."

Those who have not even switched providers before are even more likely to rely on rumour and conjecture around the porting process. In fact some are not even aware that it is possible to keep your mobile phone number. Among this group of consumers, concerns are mainly centred around the various elements of the switching process overall (being talked into something they don't want, being able to compare between the deals on the market, the risk of billing or new direct debits going wrong) rather than the porting process itself - although once introduced, the idea of porting can add to the general perception of switching being a hassle.

Those who have gone through the porting process also emerge with differing expectations, depending on their experiences. While some believe the process to be relatively straightforward and pain free, others had experienced the process as a time consuming and stressful one (albeit that sometimes their experience is out-of-date compared to current processes). A degree of frustration is sometimes evident: advances in technology have raised consumer expectations to the point where they cannot understand why the process is not simpler and quicker.

The research shows that whether potential porters are new to the process or not, expectations are not always in line with reality. This can be enough to put people off porting - or create frustration with the process if they do go ahead and port.

5. Experience of the porting process

5.1. The ingoing approach

For Residential consumers, the decision to port can be quite impulsive and unplanned. First time porters may not even consider it as an option until they are told about it by their new provider once they have decided to switch. Advertising by the network providers is also a common way to come across, or be reminded about, number porting.

First time porters may speak to their new and/or existing provider about how the process works but this is typically a reactive, not a proactive, conversation - in other words it tends to be initiated by the network provider, not the consumer.

In fact Residential consumers may not know that they need a PAC code (or that they need to request the PAC code themselves) until the new provider requests it (either over the phone or via an online application form). Having to speak to the existing provider to request the PAC code opens up the possibility that the consumer will be retained - in which case they still don't experience the porting process.

Only those who actively wish to keep their number will take porting into account at an early stage in the decision on whether or not to switch. The benefits to be gained by switching (typically financial) have to be sufficient to justify going through the porting process.

For Business consumers, the decision to port also tends to be well planned. It is either an intrinsic element of the switching process or not, depending on the value placed on the number (as previously described). Therefore the decision to port is typically fixed at the point of making the decision to switch - at the point when PAC codes are requested, Business consumers are unlikely to be open to being persuaded to stay.

5.2. The pain points

There are a number of potential pain points during the porting process for both Residential and Business consumers, as follows:

5.2.1. Obtaining the PAC code

Difficulties obtaining the PAC code from the existing provider are commonplace among Residential consumers, making this initial stage of the porting process the most painful from a consumer experience point of view.

Several Residential consumers shared a feeling that their existing provider was intentionally making it difficult for them to leave by using delaying tactics in the issuing of the PAC code. Some were told that the "system was down", some had to deal with being put on hold for long periods of time, others failed to receive the PAC code as promised. Many had to call back several times before successfully obtaining their code.

"[X] told me I could keep my old number but I didn't get it (THE PAC CODE) on that first call. I had to call back because they said the system had gone down. Then they sent me an email starting 'because of your loyalty' and offering some deal - but I'd just told them I was leaving! I think they delayed giving me the code to see if they could get me to come around."

"They kept saying the PAC code was in the post but then I would wait for a few days and it did not arrive. Every time I then had the hassle of trying to get through to speak to someone. After two or three attempts I lost it with them and they then emailed me the number. What was really irritating is why they did not do that all along."

"I had to call a couple of times for the PAC code when it should have been once. They also told me the system was down! [X] offered to call direct when I was in the shop but I rang myself - this time they gave it to me over the phone."

Typically this aspect of the porting process only affects attitudes - creating frustration with the length of the process, tending to justify the decision to leave and making consumers cynical about the motivations of the network providers.

"You can delay it as much as you like but I'm still going to go - it's just not going to make me recommend you."

However it can also affect behaviour - in a couple of instances Residential consumers describe being forced to give up on their attempt to port, switching to a new number instead.

"I tried to keep my number as I thought it would be less hassle to keep it than have to text everyone - I could do a group text but I didn't want to send a message to old school friends or boyfriends and have them get back in touch with me. But I just couldn't get through - I called several times and was on hold for 20 minutes at one point. So I started using the new number and people started to get used to it."

5.2.2. Dealing with the retention strategies of the network providers

There are benefits and drawbacks to being persuaded to stay and the final opinion is dependent on each individual consumer's mindset.

On the plus side, being put through to the retention team when you call to request your PAC code provides an opportunity to get a better deal without having to go through the hassle of switching. It can also create a feeling of being a valued customer - as if it matters that you are leaving.

However for those who are not open to persuasion, being forced into these conversations is merely an obstacle to getting their PAC code and delays the completion of the switch - if they had wanted to negotiate they would have done so earlier on in the process.

Both Residential and Business consumers would prefer to avoid having to deal with the retention team at this time if given the choice.

However for consumers it is a matter of avoiding an uncomfortable conversation. Some don't want to be put into an awkward situation and made to feel guilty about their decision to leave. Some feel vulnerable to being 'bullied' into staying, when really they want to leave. For others, being offered a good deal to stay simply highlights the lack of attention they receive as customers - inviting them to question why they weren't offered the deal beforehand in appreciation of their loyal custom. In this case it simply justifies the decision to leave.

"I am thinking I need to ring [X] and find out when my contract ends so I can consider my options. I feel a bit anxious. I hate ringing up and asking around cancellation time as they always ask you why you want to leave and that just makes me feel guilty. So I want to avoid any questions and make out it's an enquiry. I do not ring up and think I will do it in the next few days."

“When you ring for an upgrade...they always want to charge you, however when your contract ends they will give you anything you want. If they treated you fairly throughout...then maybe people would not consider leaving at the end of their contract.”

Business consumers are typically happy to give their existing provider the opportunity to match a deal - and are more confident in handling such negotiations. However they will tend to have had this conversation earlier in the process. By the time they call to request their PAC codes, they have already made their decision to leave - and accept that the network can do little to retain them at this point.

Typically this aspect of the porting process only affects attitudes - at worst, these conversations represent a nuisance or justify the decision to leave. However it can also affect both switching and porting behaviour - in a couple of instances Residential consumers describe how the thought of the retention conversation introduces a layer of hassle that they would rather avoid, and which has influenced their decision-making.

“I don’t want the hassle of having to deal with a company. You always get through to a call centre and they try to keep you - all that messing about - I can’t be bothered. I’d rather just tell my friends the new number and cut that out.”

“I always worry that I am going to get talked into something I don’t want to do. The thought of that whole conversation, along with the concern that my Direct Debit or something is bound to go wrong, keeps making me put off actually getting round to changing.”

5.2.3. The 30 day expiry on the PAC code

This tends not to be a major pain point as both Residential and Business consumers tend to act fairly quickly on receiving their PAC code(s) - seeing no reason to delay contacting their new provider having made the decision to move. Most also felt that they would be unlikely to initiate the switching process if they were not going to be around to deal with the transition - they wouldn’t call for their PAC codes in advance of taking annual leave for example.

The only thing that might create pressure on time would be if the PAC codes were sent by mail and got lost in the post.

A few Residential consumers wondered whether they would lose their number altogether if they didn’t use it within 30 days, which caused some consternation, but this was agreed to be an unlikely scenario.

5.2.4. The port lead time

The time taken from the point at which the new provider is informed of the PAC code(s), to the point at which the old number transfers to the new phone or SIM card, is generally felt to be surprisingly, unnecessarily, excessively, long. A five day lead time was not uncommon for both Residential and Business consumers - although this might include weekends.

“I rang and got the code there and then but it took three days to transfer the number over. It wasn’t a problem for me but I can imagine it would be an issue for a business person.”

"I had to initiate (BUSINESS) calls to people I was expecting to speak to that week - it was only half a dozen calls, so it wasn't a major problem, but I feel I shouldn't have had to do it. If it had happened on a busy week it would have been a problem."

"I suffered a new number for a day or two - I could only call out - and hoped nothing important would happen."

There can be a lot of anxiety and/or frustration during this transition period, largely because many (particularly Residential consumers) did not seem to know when exactly their number would switch across. This creates a feeling of being out of control and impedes planning. It does not appear to be standard practice for the network providers to identify the specific date and time when the number will be ported.

"I had a period of only a day but it felt like ages as I did not know when my old number would transfer across - I had to keep switching my new phone on and seeing if it was on the new number yet."

There is also a relatively high level of mistrust in the process actually working, mainly among first time porters. A degree of confusion around whether or not you can maintain continual connection to your old number during the porting process was also evident, mainly among Residential consumers.

This uncertainty (around the time of the switchover and the potential loss of service) is at least as significant a pain point as the port lead time itself, if not more so. It adds to the sense of the process being a hassle among both Residential and Business consumers, although it tends to be more of an irritant than something that impacts on decision-making. All consumers go through this period of limbo and are typically ready to adopt coping strategies to ensure service continuity.

In particular, the transition process is made easier for those on contracts by overlapping the old and the new contract, running two phones in parallel. This is an essential part of managing the porting process for Business consumers with multiple users, a way to reduce the risk they associate with having to port numbers in bulk. Residential consumers have to manage the overlap within their 30 day time period.

This coping strategy has a significant impact on attitudes towards port times, making it even more important to be given a set time slot than a set number of days in order to be able to manage and minimise the cost implications.

"I had to pay for my other phone anyway so it is not that big a deal but I did not like the feeling of not knowing what is going on. It would have been good to have a clearer idea of when it was happening."

Business consumers may also 'control' or manage the process by phasing the distribution of new phones or holding back until the porting process is complete. They might also choose to transition in a 'quiet time'. For example, one IT manager distributed the new phones to staff on a Friday afternoon, with a view to minimising the impact of any loss of service by having it happen at the weekend - selling this to users as an opportunity for them to familiarise themselves with the new phone, transfer over their contacts etc.

"We phased it in over a week to ensure a smooth transition - I wanted to keep an eye on everything as I was worried about loss of connectivity and being in a limbo when nobody (either existing or new network provider) has responsibility for the number."

Residential PAYG consumers cope with the transition by carrying two phones or switching between their old and new SIM cards in the new phone.

Although some remain baffled that the technology is not there to allow instantaneous number transfer (particularly in the context of the “immediate” switchovers available in other markets such as utilities and banking) two days is generally seen to be an acceptable port lead time.

5.2.5. The final switchover

There was no evidence of the number not porting. Typically the reality of the switchover is fine, despite the lack of trust in the process and the stress this induces.

“It wasn’t complicated but I was convinced it wasn’t going to work.”

“I steeled myself - although it wasn’t as difficult as I anticipated, it seems like a well trodden path.”

The anxiety and frustration associated with the porting process is evidenced by the way consumers feel once they have completed the switch:

“Glad it was over.”

“Relieved.”

“It’s done!”

“Can’t believe it worked.”

“Pleasantly surprised.”

“Quite pleased with myself.”

6. The impact of number porting on consumer choice

6.1. Impact on decision to port

In the main, the porting process simply represents poor customer service - an additional layer of hassle in the switching process. However this can on occasion be sufficient to influence the decision to port.

Those Residential and Business consumers who place a high value on keeping their mobile phone number are typically prepared to put up with any hassle and do “whatever it takes” to port when they switch. Only in a couple of instances were these types of consumers forced to give up porting (and this was a result of difficulties getting their PAC code).

However difficulties associated with porting can be the deciding factor in the decision to keep their number or not - particularly among Residential consumers who regard their number as a “nice-to-have”. These consumers will trade off the effort of changing their number with the effort of keeping it. Although they ideally wish to keep their number it is not an essential outcome, so if they anticipate or experience any hassle in the porting process they are vulnerable to changing their mind. They can easily be put off by hearing bad stories, or having poor experiences themselves in the past. If they are also first time porters they also rely on what the network providers tell them about how onerous the process is, which can sometimes be misleading. They can be dissuaded from porting if they perceive the process to involve:

- Too many points/steps where things can go wrong
- A long process from start to finish
- A lot of effort on their part
- Being disconnected from their old number for even a short period of time
- Maintaining two contracts or running two phones simultaneously
- Being charged for porting.

6.2. Impact on decision to switch

There is no evidence from the research that the porting process has a significant impact on switching decisions overall. It might cause some consumers (particularly Residential consumers) to go ahead and switch without porting, and can contribute more generally to a feeling that it is easier to stay. However it is unlikely to influence the switching decision because this tends to be based on other, more powerful factors - such as the acquisition of a better deal, or the assurance of better coverage. Therefore if consumers decide not to switch, porting is not typically the reason why, as the following mystery shopping experiences illustrate:

Case Study 1: The process of comparing between providers/comparing deals makes the decision too difficult

“It is so hard to compare between providers and the lack of transparency and flexibility makes it all so difficult that it is easier to stay unless there is a really obvious incentive to leave.”

“In the end I got so confused by the whole thing, all the different tariffs that are available, that I decided when they offered me a better deal to stay where I was. I decided it is better to stick to the devil you know.”

Case Study 2: Realise the process of switching might be a major effort / hassle

"I am considering not leaving [X] now as I think the process may be a bit long winded, setting up a new account with a new provider, and I have not got the time to do my research as I am quite busy after moving into my new house."

Case Study 3: The current provider is able to beat the deal seen elsewhere

"After I had looked around I thought I would go back to [X] to see if they could better the deal as it would be easier not having the hassle of another new number. I probably would have gone through the pain of switching over my number if I had found a better deal elsewhere but I didn't have to."

"I am thinking this is a good deal, I do not have to do much either in terms of giving all my details again and setting up a new account with a new provider. This is actually easier and it means I save money, so I decide to stay and not switch."

Case Study 4: Realise the grass is not necessarily 'greener'

"I was told I would have to be put on a 24mth contract with [X] to get the deal I wanted, which put me off to be honest."

I called [X] and spoke to a really, really nice lady, who recognised me as a valued customer and didn't seem to want to hassle me, which meant I felt I could explain my situation to her. I said I might not want to cancel my contract after all and she beat the [X] deal hands down with a free phone, and a cheaper contract than I was on before."

However the porting process can impact in a more subtle way on switching: if it is vital for a consumer to keep their number, and they have had poor previous experiences of porting or heard bad stories about it, they might need more of an incentive to switch - or even "think twice" about switching again in future. Nonetheless, as this report has documented, it is the problems within the process rather than the process itself that can influence the decision, as the following mystery shopping case studies illustrate:

Case Study 5: Anticipation of poor porting experience was a factor in the decision not to switch - not worth it for the hassle

For them it was 'vital' that they kept their number however poor previous experience...

"I called up [X] and they gave me the number over the telephone, and I then gave this to [X]. The whole thing ended up being a nightmare as there was a digit wrong in the [PAC] code and I ended up having to be the one to phone the two and sort it out, I felt like a bit of a mediator. I was without my phone for a week and was on the phone for at least a few hours over the course of a few days getting it sorted as they did not seem to want to talk to each other."

Combined with hearing a bad porting story...

"I decided the process must have improved by now. While I was looking into the new deal I heard that my sisters husband had had a problem with his PAC code which meant the bills were all wrong and it took ages to sort out, this reminded me of my own nightmare and put me off to be honest."

Put them off switching as there wasn't sufficient benefit to overcome the cost...

"While there were also other reasons for staying with [X], I would say that the risk of them getting it wrong when I transferred my number across was 70% of the reason I decided to stay where I was in the end."

Case Study 6: Ported successfully but would think twice about switching again unless the savings were sufficient and/or there was a strong reason to leave (like poor coverage)

While...

"It was all pretty quick and easy really. [X] were really helpful and I got my new phone in a couple of days of speaking to them."

On reflection...

"At the end of the day the whole thing about transferring your number was a bit of a hassle. There were points when I really did not know what was going on, particularly not knowing when my number would be switched over. [X] told me it would be take 8-12 hours when I called them up to find out how it worked but in reality it was only a couple of hours. It was the not knowing that I did not like - surely it could be done in the press of a button?

[X] also told me that they would have to send me the PAC code in the post but a friend of mine had told me I could get it on the phone as the same thing had happened to them - so I pushed them and got it. I thought that was bad because if I had not known, I would have had to wait and wonder what was happening."

7. The impact of process improvements on consumer choice

7.1. The ideal number porting process

In an ideal world, consumers are looking for a porting process where:

- Everything happens as expected
- Continuous connection to the old number is maintained throughout the process
- They can avoid unwanted retention strategies from their existing provider
- The PAC code is received quickly and efficiently, ideally not involving postal services
- A set date and time for the number transfer is provided, ideally within two days of providing the PAC code to the new provider
- Billing and direct debits go smoothly.

7.2. Reaction to potential process improvements

Consumer reactions to the proposed process improvements are outlined below:

7.2.1. Speed of receiving PAC code

Ideally consumers would like to receive their PAC code more quickly. The idea of receiving it (via text) within ten minutes generally exceeds expectations - within a day would be acceptable and would also represent an improvement on the current process for most consumers.

7.2.2. Method of accessing PAC code

Ideally consumers would like the option of bypassing the retention team so the idea of an automatically generated PAC code sent via text has appeal. However at the end of the day most consumers are open to several methods as long as they can avoid using the postal services. This method is not only outdated and potentially unreliable; it also slows things down (compared to electronic methods) and removes control from the consumer. Nor do they want to be restricted to receiving the PAC code in a retail environment. Providing the flexibility for consumers to choose between multiple methods is the best way to meet all needs and preferences.

7.2.3. Expiry date for PAC code

The timeframe for using the PAC code could be reduced to 15 days with no real loss as most consumers will contact their new provider immediately on receipt.

7.2.4. Reducing port lead time

Experiences vary considerably but there is a general consensus that a five day port lead time is unacceptably long in this day and age, particularly in the context of much faster switchovers in other markets (utilities/banking). Two days is generally more acceptable, although some would not be encouraged to port unless they could be convinced that they would maintain access to their old number throughout the transition. Increasing certainty by providing reassurance about continuous connection to the old number and providing a more tightly defined switchover 'slot' would be a more considerable improvement.

Given that uncertainty is at least as big a pain point as the port lead time itself, it follows that few consumers would be prepared to pay to speed up the switchover. This is mainly a matter of principle: if faster port lead times are technically feasible, they should simply be offered as a universal service improvement as part of good customer service. They don't see why they should be subject to a second rate service.

Residential consumers are typically happy to live with current port lead times unless they are using their mobile for business purposes, in which case they might consider a nominal fee to have the switchover done within 24 hours. A small number of Business consumers would also be willing to pay a nominal amount to reduce the port lead time to 24 hours. A Business consumer's willingness to pay increases if their mobile phones are business critical, or if they have fewer than ten mobiles (otherwise the cost is expected to be prohibitive).

However all consumers would still resent having to pay for this level of service and there is no evidence to suggest that if this option were available, it would encourage more consumers to port.

7.2.5. Moving to a recipient led process (Residential consumers only)

A recipient led process is often the way number porting is expected to happen among first time porters or switchers who don't know any better - driven by experiences in other markets such as utilities and banking. It is also widely assumed to be easier than the current donor led process as it takes the burden of work off the consumer - and fewer calls mean less hassle. For this reason it might encourage a small number to port.

However, in moving to this approach, the consumer effectively relinquishes control to the network providers and this could make it more difficult to sort things out if something goes wrong. Some do not trust their existing provider to co-operate in handing over the PAC code to a new provider, so the risk of something going wrong is felt to be very tangible.

While the donor led process places the onus of work on the consumer, and opens them up to unwanted retention tactics by the existing provider, it does at least provide an element of control. Some consumers therefore question whether or not a recipient led process would in reality lead to better outcomes for the consumer.

There is no evidence that a recipient led process would have any significant impact on the decision to switch among Residential consumers.

7.3. Assessing the desire for process improvements

There are several different levels of change that could be implemented.

7.3.1. Level 1

At the most minimal level, consumers would welcome improved choice and control over the entire number porting process:

- Better explanation of process from network providers
- Choice over whether or not they get put through to the retention team
- Choice over the method of accessing the PAC code (including all electronic methods: telephone, text, email)
- A maximum (rather than a minimum) port lead time of two days

- A fixed date and time slot for the switchover
- Kept informed of progress by new provider.

Without fundamentally changing the porting process itself, this level of change would provide an improved level of customer service to all consumers and a greater sense of being in control of the process. While many of these are already occurring in the best case scenarios, they are certainly not occurring universally, ensuring that things happen as (and when) they are supposed to would be a definite improvement on the current situation.

In terms of behaviour change, it might encourage Residential consumers who regard their number as a “nice-to-have” to go ahead and port. It also removes the chance that porters are stopped by the process.

7.3.2. Level 2

At the next level, involving a small change to the existing process, would be the provision of an automated PAC code service.

Residential consumers tend to respond positively to the idea of receiving their PAC code via text within a 10 minute time frame because it removes an existing pain point. For Business consumers who are porting in bulk (those with five or more mobile phones), an email service is more desirable given the number of PAC codes that need to be provided. Email also provides the Business consumer with an important paper trail.

Introducing this process improvement would have a similar impact on behaviour as the level 1 change described above and is seen as a good half way house between a recipient led porting process.

7.3.3. Level 3

At the highest level, involving the most fundamental change to the existing process, would be a move from a donor led to a recipient led porting process, with a choice over how the process is initiated (consumers would not be bound to a retail outlet), and a 1-2 day port lead time.

This level of service improvement would have a similar impact on behaviour as the previous two levels described above.

It might also encourage switching among the very small proportion of consumers for whom keeping their number is essential, but who are reluctant to switch because they don't want to go through the hassle they associate with porting. However the additional impact of this more fundamental change to the process is unlikely to be significant.

7.3.4. In summary...

In summary, the greatest pain point for Residential consumers is in obtaining the PAC code - improvements in this area would certainly be welcomed. The greatest pain point for Business consumers is in the port lead time and the lack of certainty around the switchover moment - again, improvements at least in the customer service elements of this process would be welcomed.

However it is important to note that many of these changes are simply “nice-to-have”. Although they would afford an improved level of customer service for all consumers, they do not trigger significant shifts in either switching or porting behaviour.

While the current porting process can be onerous, unnecessarily slow and create the unpleasant feeling of being out of control, the switchover ultimately works. And those Residential and Business consumers who place a high value on keeping their mobile phone number are typically prepared to put up with any hassle and do “whatever it takes” to port when they switch.

It follows that when consumers are asked what their greatest improvement priorities are, they cite a number of other issues relating to switching and service use in the mobile phone market.

Residential consumers express a desire to improve the following issues, in descending order of importance:

- Easier to compare deals
- Better handsets
- Better coverage
- Roaming between providers in the UK
- Reduced cost of international calls.

Business consumers express a desire to improve the following issues, in descending order of importance:

- Better coverage
- Reduced cost of international calls
- Roaming between providers in the UK
- Easier to compare deals
- Better technology.

For both audiences, improvements to the porting process are seen to be a lower priority for Ofcom than any of the broader issues identified above.

Appendices

A. Discussion Guides

DISCUSSION GUIDE - FOCUS GROUPS (CONSUMERS) V3, 8TH JANUARY 2009

This research document is designed for qualitative research, therefore:

- *This document is a guide only, moderators would not necessarily adhere to the exact structure or wording of the document - and would need to adapt the language as appropriate to each individual respondent*
- *Sections will be covered in an order that is most effective for obtaining the information in each session - it may be more effective to cover later sections earlier in the discussion if it helps respondents verbalise their thoughts/needs states*

1. INTRODUCTION TO THE SESSION (2 MINS)

- Introduce Jigsaw and self
- Explain purpose of research: to talk about why you do or do not switch provider of your mobile phone
- MRS Code of Conduct, confidential and anonymous discussion lasting 1.5 hours - explain purpose of tape recorder
- Explain that this is an open session: there are no right or wrong answers.
- The moderators have no vested interest in the services being researched
- Advise that Ofcom has commissioned Jigsaw for this research

2. WARM UP (5 MINS)

Consumer

- Household description: who else they live with, type of property (home owners vs. renting), how long they have been there
- Current mobile phone provider
 - ◆ How long been with
 - ◆ How much pay - what is included
 - ◆ PAYG vs. contract
- Who else involved in decision-making for mobile phones (sole decision maker/make decisions with family, friends etc.)

3) OVERALL DECISION MAKING FACTORS (IN BRIEF)

For the rest of this discussion we will be focussing on gathering information about your mobile phone use, and what would be important to you when considering switching your mobile phone provider.

- Can you briefly talk me through your usage of mobile phones services including:
 - How you use each service - frequency and types of activities undertaken
- In general, how important would you say each of these services is to your everyday life overall and why?
 - How would you react if it was taken away?
 - What would be your biggest frustration?
- Have you switched provider or considered switching in the last two years?
 - When was this?
 - What has prompted this decision?
 - What did you hope to achieve by making this change?
 - Did you ultimately end up switching?
 - ◆ IF SWITCHED IN BRIEF: Why did you choose your mobile provider?
 - How important was it to switch?
 - ◆ THOSE NOT SWITCHING: What made you want to switch initially?
 - How important was it to switch at this time?

4) UNDERSTANDING SWITCHING PROCESS (IN BRIEF)

Next I would like to explore in more detail why you did or did not switch phone providers.

- How easy is it to switch phones?
- How long does the whole process take?
- What are the various stages you go through in the switching process (in generic terms)
 - ◆ Researching providers
 - ◆ Making decision
 - ◆ Calling up existing provider
 - ◆ Cancelling existing contract/making the decision
 - ◆ Actual switch over
- Which elements of the process are the greatest pain points
 - ◆ Which take longer/are more difficult than you might otherwise have expected?
 - Why/how?
- What are the barriers to switching - in other words, the things that make switching difficult or put you off?
 - WRITE UP ALL BARRIERS ON CARDS

- GET GROUP TO PLACE IN CHRONOLOGICAL ORDER OF EVENTS - AGAINST KEY STAGES IDENTIFIED EARLIER
- FOR EACH BARRIER ASK GROUP TO TALK THROUGH IMPACT THIS HAS - PARTICULARLY LOOKING AT NUMBER PORTING
- RANK BARRIERS IN TERMS OF STRENGTH - INCLUDING ANY 'FINAL STRAWS'
- **TYPE C RESPONDENTS:** What ultimately put you off switching?
- At the end of the whole process how did you feel?
- What could be done to improve the switching process/make it easier to switch?
 - ◆ If there were three key elements you would improve what would they be?
 - ◆ What would you like to see changed?

Contact With Existing Provider

- What sort of contact did you have with your existing provider during the process?
 - ◆ What happened, at what stage in the process?
 - ◆ If called: Why did you call them up?/What motivated you to make the call? (LISTEN OUT FOR PAC NUMBER/NUMBER PORTING MENTIONS AND PROBE AS APPROPRIATE)
 - ◆ How, if at all, did this impact on your decision to switch?
 - ◆ To what extent did they try and persuade you to stay?
 - How did they persuade you / what did they offer you?
 - How much impact did this have?
 - How did you feel about this?
- IF MENTION PAC CODE PROBE:
 - ◆ How did you have to request the PAC? (Phone/post/e-mail/online/other)
 - ◆ How did they issue the PAC to you? (Phone/post/e-mail/online/SMS/other)
- How do you know whether your current contract has expired?/How did you find this out?

Number Porting (ONLY ASK WHERE NOT ALREADY COVERED SPONTANEOUSLY)

- **TYPE A RESPONDENTS:** Did you keep your number when you switched?
- **TYPE B & C RESPONDENTS:** Did you intend or attempt to keep your number when you switched?
 - ◆ Why/why not?
 - ◆ Did you know before you attempted to switch that the option of keeping your existing number was available to you?
 - ◆ How did you find this out? At what stage in the process?

- How important is keeping your number to you? Why/why not?
 - ◆ IF NOT ALREADY KNOWN - How important is this to you relative to the other factors mentioned previously?
 - ◆ What impact relatively did keeping your number have on your decision to/not to switch mobile phone provider?
- What are the benefits of keeping your number?
- What are the costs/hassles associated with keeping your number(s)?

ALL TYPE B RESPONDENTS / TYPE C RESPONDENTS WHO DID NOT ATTEMPT TO PORT

- How easy would you expect it to be to keep your existing number if you want to?
 - ◆ Do you know how to go about this?
 - ◆ How do you think the process would work?
 - ◆ How long did you think it would take?

ALL TYPE A RESPONDENTS / TYPE C RESPONDENTS WHO ATTEMPTED TO PORT

- How easy is it to keep your existing number if you want to?
 - ◆ How does the process work?
 - PROBE: How did you have to request the PAC? (Phone/post/e-mail/online/other)
 - PROBE: How did they issue the PAC to you? (Phone/post/e-mail/online/SMS/other)
 - ◆ What were your expectations of how easy or difficult it would be to switch your number prior to doing so?
 - How long did you think it would take?
- Talk me through what happened when you switched/tried to switch your mobile phone number.
 - ◆ What stages did you have to go through in the process?
 - WRITE UP STAGES & FOR EACH:
 - How easy/difficult was each stage?
 - What, if any, difficulties did you experience?
 - How did you feel at this stage of the process?
- What sort of interaction did you have with your existing mobile provider?
 - ◆ How do you feel about having to ask for your PAC number?
 - How did your current mobile provider react?
 - How helpful were they in assisting you to keep your number?/How easy did they make it sound?
 - How did you feel at this point? (is it empowering, embarrassing, a hassle etc.)

- What concerns did you have during the switching over process?/What was important to you?
- How did the process compare with what you would have expected?
 - ◆ How easy was it overall to switch numbers? Why/why not?
- At the end of this whole process how did you feel?
- How long does the whole process take?
 - ◆ How did you feel about this?
 - ◆ What impact does the time it takes at the moment have on you? How does this affect you?
 - Why is it/is it not an issue?
 - Is the issue more one of hassle or time? (If they mention 'hassle' ensure you probe to understand what the 'hassle' is)
 - What impact does this have on the overall length of the whole process?
 - ◆ What impact did this have on your decision to switch providers/numbers?
 - ◆ IF SAY WOULD LIKE IT TO BE QUICKER ASK: What do you mean by quicker?
 - When are you considering the process to start and finish?
 - Which element of the process are you looking to be quicker in particular?
- What impact did the number switching process have in your decision to/not to switch mobile providers?
 - ◆ To what extent did the time it takes have an impact on your choice to switch providers/choice to switch numbers?
- How could the process of switching numbers be improved?

ASK ALL

- SHOW EXISTING PROCESS
 - ◆ How does this compare with your understanding of how it works?
 - ◆ What seems better/worse?
 - ◆ Are there any pain points in this process you did not mention earlier? How did this affect you?
 - ◆ In an ideal world what would you like to see happen to improve this process?
 - ◆ Which elements in particular would you like to see improved?
 - ◆ Which elements in particular would you like to see happen quicker?
- IF NOT MENTIONED: Are there any practical impacts of the two day minimum period from when you requested porting of your number to when that occurred?
 - ◆ E.g. Having to carry two phones, paying for two phones but only using one, being out of reach' while the number is not ported

- Are you aware of any Ofcom targets regarding the process of keeping your number(s) when you switch mobile phone providers? If YES - What are they?
- IF NOT SWITCHED @ What concerns might you have during the switching over process?/What would be important to you to ensure?

5) REACTION TO STIMULUS

We are now going to talk through some ideas for how the number switching process might work, in order to understand whether this would be an improvement for your business.

- First of all I am going to show you a number of alternatives which I would like to get your reaction to. SHOW EACH OF PAIRS B1-4 - ROTATE ORDER OF SHOWING. ROTATE QUESTIONS FOR EACH PAIR.
 - ◆ Which is your preferred option? & Why?
 - ◆ How much difference would this actually make?
 - ◆ What seems easier/better about your preferred option?
 - ◆ What are the drawbacks/concerns of the alternative?
 - ◆ What impact, if any, would this have on their likelihood to switch mobile providers depending on which option was available?
 - ◆ What impact, if any, would this have on their likelihood to switch/keep their number depending on which option was available?
 - ◆ FOR TIME FRAME TO PORT - IF REJECT MINIMUM OF 2 DAYS - What timeframe is reasonable?
- In an ideal world what else would you want during the switching process? what would it be important to ensure?
 - Speed of switching
 - Dedicated customer support during the switching process
 - Continuity of service (during the number change)
 - Overseas roaming ability was maintained
 - Billing issues - complications with the bill

ROTATE ORDER OF SHOWING THREE STIMULUS WITH NEW OPTIONS - REPEAT QUESTIONS FOR EACH SUGGESTION.

- SHOW STIMULUS WITH THE IDEA(S) FOR A RECIPIENT LED (AND OTHER ALTERNATIVES FOR) PROCESS - SHOW IN CONTEXT OF WHAT YOU DO NOW AND HOW THIS WOULD WORK. ASK TO CIRCLE ANYTHING IN THE DESCRIPTION THAT SOUNDS PARTICULARLY ATTRACTIVE/PUT A CROSS THROUGH ANYTHING THEY DO NOT LIKE THE SOUND OF

- ◆ Initial thoughts
- ◆ Questions as to how this would work?
- ◆ How does it compare with what is currently available?
- ◆ How much difference would this actually make?
- ◆ What are the benefits?
 - What seems easier/better about how it works now?
- ◆ What are the drawbacks/concerns?
 - What seems more difficult/complicated about how it works now?
 - What problems, if any, could they envisage with this process?
- ◆ FOR RECIPIENT LED:
 - Would you still speak to your existing provider? Why/what for?
 - Would you have any concerns about not being aware of your contract period or terms if you did not get in touch with your current provider?
- ◆ What impact, if any, would this have on their likelihood to switch mobile providers?
- ◆ What impact, if any, would this have on their likelihood to switch/keep their number?
- Having seen this how does it impact on their view of the ideal process?

6) PAYMENT

- What would be a reasonable payment to receive from a new mobile provider in exchange for having a new number? ASK RESPONDENTS TO WRITE DOWN. When writing this down please bear in mind the costs associated with changing your existing number (i.e. the actual costs of informing people) as well as the time/hassle involved.
- How do you feel about the idea of making a one off payment to speed up the process of keeping your existing number? ASK RESPONDENTS TO WRITE DOWN AND DISCUSS AT END
 - ◆ What impact, if any, would this have on their likelihood to switch mobile providers?
 - ◆ What impact, if any, would this have on their likelihood to switch/keep their number?
 - ◆ How much would you be prepared to pay? DISCUSS WHAT WRITTEN DOWN
 - ◆ DISCUSS WHAT WRITTEN DOWN AS REASONABLE PAYMENT
 - Establish whether really value number vs. see as an opportunity to make some money.

PROMPTED

- How do you feel if the one off payments to speed up keeping your existing number were as follows : SHOW PRICE POINTS STARTING AT HIGHEST POINT
 - ◆ How likely would you be to keep your existing number at this price point? WRITE DOWN ON A SCALE OF 1-10 WHERE 10 IS EXTREMELY LIKELY AND 1 NOT AT ALL LIKELY.
 - ◆ Show all price points then briefly discuss what written down.

7) CLOSE

- Any other thoughts or suggestions you would make?
- If you were Ofcom, how big an issue do you think number porting is?
 - ◆ What one or two things would you change?

DISCUSSION GUIDE - IN-DEPTH INTERVIEWS (BUSINESSES) V3, 8TH JANUARY 2009

This research document is designed for qualitative research, therefore:

- *This document is a guide only, moderators would not necessarily adhere to the exact structure or wording of the document - and would need to adapt the language as appropriate to each individual respondent*
- *Sections will be covered in an order that is most effective for obtaining the information in each session - it may be more effective to cover later sections earlier in the discussion if it helps respondents verbalise their thoughts/needs states*

1. INTRODUCTION TO THE SESSION (2 MINS)

- Introduce Jigsaw and self
- Explain purpose of research: to talk about why you do or do not switch provider of your mobile phone
- MRS Code of Conduct, confidential and anonymous discussion lasting 1.5 hours - explain purpose of tape recorder
- Explain that this is an open session: there are no right or wrong answers
- The interviewers have no vested interest in the services being researched
- Advise that Ofcom has commissioned Jigsaw for this research

2. WARM UP (5 MINS)

- Company background: what does the business do/make/sell and for whom, how long have they been in operation, what sales channels do they use, how big are they, part of a chain (number of sites)?
- Respondent background: job title, role/responsibilities (PROBE: aspects outside IT&T)
- What is the biggest issue they face as a business today?
- Percentage of time they actually spend on managing their mobile phone services budget vs. percent of time they would ideally like to spend
 - ◆ Average spend on mobile phone services
 - ◆ Biggest frustration/challenge/problem with your mobile phone services
- Who else involved in decision-making (individuals, teams, job titles)
- Mobile phone set up
 - ◆ How many employees have them
 - ◆ Who gets them/how decided
 - ◆ Type of contracts on - including provider

- ◆ Spend on mobiles
- ◆ How long been with current provider(s)

3) OVERALL DECISION MAKING FACTORS

For the rest of this discussion we will be focussing on gathering information about your mobile phone use, and what would be important to you when considering switching your mobile phone provider.

- Can you briefly talk me through the business usage of mobile phones services including:
 - How you use each service - frequency and types of activities undertaken
- In general, how important would you say each of these services is to the business overall and why?
 - How would your business react if it was taken away?
 - What would be your biggest frustration?
- Do you have a specific account manager at your mobile phone provider?
- Has your company switched provider or considered switching in the last two years?
 - When was this?
 - What has prompted this decision?
 - What did you hope to achieve by making this change?
 - Did you ultimately end up switching?
 - ◆ IF SWITCHED IN BRIEF: Why did you choose your mobile provider?
 - How important was it to switch?
 - ◆ THOSE NOT SWITCHING: What made you want to switch initially?
 - How important was it to switch at this time?

4) UNDERSTANDING SWITCHING PROCESS

TYPE A, B, C RESPONDENTS: Next I would like to explore in more detail why you did or did not switch mobile phone providers?

TYPE D RESPONDENTS: Next I would like to explore your attitudes towards switching mobile phone providers based on previous experience and/or your experience of switching to date.

- How easy is it to switch phones?
- How long does the whole process take?
- What are the various stages you go through in the switching process:
 - ◆ Researching providers
 - ◆ Making decision
 - ◆ Calling up existing provider
 - ◆ Cancelling existing contract/making the decision
 - ◆ Actual switch over

- Which elements of the process are the greatest pain points
 - ◆ Which take longer/are more difficult than you might otherwise have expected?
 - Why/how?
- What are the barriers to switching - in other words, the things that make switching difficult or put you off?
 - WRITE UP ALL BARRIERS ON CARDS
 - ASK RESPONDENT TO PLACE IN CHRONOLOGICAL ORDER OF EVENTS - AGAINST KEY STAGES IDENTIFIED EARLIER
 - FOR EACH BARRIER ASK RESPONDENT TO TALK THROUGH IMPACT THIS HAS - PARTICULARLY LOOKING AT NUMBER PORTING
 - RANK BARRIERS IN TERMS OF STRENGTH - INCLUDING ANY 'FINAL STRAWS'
- **TYPE C RESPONDENTS:** What ultimately put you off switching?

- What are the important features to you when changing mobile phone provider/what do you look for from the provider?
 - ◆ PROBE
 - Continuity of service
 - Ease of transfer
 - Transfer at specific time
 - Fast transfer/speed
 - Keeping your number
 - ◆ Which factors are most important to you

- At the end of the whole process how do you feel?
- What could be done to improve the switching process/make it easier to switch?
 - ◆ If there were three key elements you would improve what would they be?
 - ◆ What would you like to see changed?

Contact With Existing Provider (in brief)

- **TYPE A, B, C RESPONDENTS:** What sort of contact did you have with your existing provider during the process?
- **TYPE D RESPONDENTS:** What sort of contact have you had so far with your existing provider?
 - ◆ What happened, at what stage in the process?
 - ◆ If respondent initiated contact: Why did you contact them?/How?/What motivated you to make contact? (LISTEN OUT FOR PAC NUMBER/NUMBER PORTING MENTIONS AND PROBE AS APPROPRIATE)

- ◆ How, if at all, did this impact on your decision to switch?
- ◆ To what extent did they try and persuade you to stay?
 - How did they persuade you / what did they offer you?
 - How much impact did this have?
 - How did you feel about this?

IF MENTION PAC CODE PROBE:

- ◆ How did you have to request the PAC? (Phone/post/e-mail/online/other)
 - ◆ How did they issue the PAC to you? (Phone/post/e-mail/online/SMS/other)
- How do you know whether your current contract has expired?/How did you find this out?

Number Porting (ONLY ASK WHERE NOT ALREADY COVERED SPONTANEOUSLY)

- TYPE A, B, C RESPONDENTS: Did you keep or did you intend to keep your number(s) when you switched?
- TYPE D RESPONDENTS: Do you intend to keep your number(s) when you switch?
 - ◆ Why/why not?
 - ◆ Did you know that the option of keeping your existing number(s) was available to you?
 - ◆ How did you find this out?
- How important is keeping your number(s) to your business? Why?
 - ◆ IF NOT ALREADY KNOWN - How important is this to you relative to the other factors mentioned previously?
 - ◆ What impact relatively did keeping your number(s) have on your decision to /not to switch mobile phone provider?
- What are the benefits to your business of keeping your number(s)?
- What are the costs/hassles associated with keeping your number(s)?

ALL TYPE B RESPONDENTS / TYPE C RESPONDENTS WHO DID NOT ATTEMPT TO PORT / ALL TYPE D RESPONDENTS

- How easy would you expect it to be to keep your existing number if you want to?
 - ◆ Do you know how to go about this?
 - ◆ How do you think the process would work?
 - ◆ How long did you think it would take?
 - ◆ How do you feel about this?
- SHOW EXISTING PROCESS
 - ◆ How does this compare with your understanding of how it works?

- ◆ What seems better/worse?
- ◆ Are there any pain points in this process you did not mention earlier?
- ◆ In an ideal world what would you like to see happen to improve this process?
- ◆ Which elements in particular would you like to see improved?
- ◆ Which elements in particular would you like to see happen quicker?
- IF NOT MENTIONED: Are there any practical impacts of the two day minimum period from when you requested porting of your number to when that occurred?
 - ◆ E.g. Having to carry two phones, paying for two phones but only using one, being out of reach' while the number is not ported

ALL TYPE A RESPONDENTS / TYPE C RESPONDENTS WHO ATTEMPTED TO PORT

- How easy is it to keep your existing number if you want to?
 - ◆ How does the process work?
 - PROBE: How did you have to request the PAC? (Phone/post/e-mail/online/other)
 - PROBE: How did they issue the PAC to you? (Phone/post/e-mail/online/SMS/other)
 - ◆ What were your expectations of how/easy or difficult it would be to switch your number prior to doing so?
 - How long did you think it would take?
- Talk me through what happened when you switched/tried to switch your mobile phone number(s).
 - ◆ What stages did you have to go through in the process?
 - WRITE UP STAGES & FOR EACH:
 - How easy/difficult was each stage?
 - What, if any, difficulties did you experience?
 - How did you feel at this stage of the process?
 - ◆ What sort of interaction did you have with your existing mobile provider?
 - ◆ How do you feel about having to ask for your PAC number?
 - How did your current mobile provider react?
 - How helpful were they in assisting you to keep your number(s)?/How easy did they make it sound?
 - How did you feel at this point? (is it empowering, embarrassing, a hassle etc.)
- How did the process compare with what you would have expected?
 - ◆ How easy was it overall to switch numbers? Why/why not?
- At the end of this whole process how did you feel?
- How long does the whole process take?

- ◆ How did you feel about this?
- ◆ What impact does the time it takes at the moment have on you/your business?
How does this affect you?
 - Why is it/is it not an issue?
 - Is the issue more one of hassle or time?
 - What impact does this have on the overall length of the whole process?
- ◆ What impact did this have on your decision to switch providers/numbers?
- ◆ What is the trade off for the time the process takes vs. certainty in the whole process?
- ◆ IF SAY WOULD LIKE IT TO BE QUICKER ASK: What do you mean by quicker?
 - When are you considering the process to start and finish?
 - Which element of the process are you looking to be quicker in particular?
- What impact did the number switching process have in your decision to/not to switch mobile providers?
 - ◆ To what extent did the time it takes have an impact on your choice to switch providers/choice to switch numbers?
- How could the process of switching numbers be improved?

ASK ALL

- SHOW EXISTING PROCESS
 - ◆ How does this compare with your understanding of how it works?
 - ◆ What seems better/worse than you remember?
 - ◆ Are there any pain points in this process you did not mention earlier? How did this affect you?
 - ◆ In an ideal world what would you like to see happen to improve this process?
 - ◆ Which elements in particular would you like to see improved?
 - ◆ Which elements in particular would you like to see happen quicker?
- IF NOT MENTIONED: Are there any practical impacts of the two day minimum period from when you requested porting of your number to when that occurred?
 - ◆ E.g. Having to carry two phones, paying for two phones but only using one, being out of reach' while the number is not ported
- Are you aware of any Ofcom targets regarding the process of keeping your number(s) when you switch mobile phone providers? If YES - What are they?

5) REACTION TO STIMULUS

We are now going to talk through some ideas for how the number switching process might work, in order to understand whether this would be an improvement for you/your business.

ROTATE ORDER OF SHOWING STIMULUS WITH IDEAS - REPEAT QUESTIONS FOR EACH SUGGESTION.

- SHOW STIMULUS WITH THE IDEA(S) FOR A RECIPIENT LED (AND OTHER ALTERNATIVES FOR) PROCESS - SHOW IN CONTEXT OF WHAT YOU DO NOW AND HOW THIS WOULD WORK. ASK TO CIRCLE ANYTHING IN THE DESCRIPTION THAT SOUNDS PARTICULARLY ATTRACTIVE/PUT A CROSS THROUGH ANYTHING THEY DO NOT LIKE THE SOUND OF
 - ◆ Initial thoughts
 - ◆ Questions as to how this would work?
 - ◆ How does it compare with what is currently available?
 - ◆ How much difference would this actually make?
 - ◆ What are the benefits?
 - What seems easier/better about how it works now?
 - ◆ What are the drawbacks/concerns?
 - What seems more difficult/complicated about how it works now?
 - What problems, if any, could they envisage with this process?
 - ◆ FOR RECIPIENT LED:
 - Would you still speak to your existing provider? Why/what for?
 - Would you have any concerns about not being aware of your contract period or terms if you did not get in touch with your current provider?
 - ◆ What impact, if any, would this have on their likelihood to switch mobile providers?
 - ◆ What impact, if any, would this have on their likelihood to switch/keep their number?
- Having seen this how does it impact on their view of the ideal process?
- How do you feel about the idea of making a one off payment to make the whole process of switching numbers quicker?
 - ◆ What impact, if any, would this have on their likelihood to switch mobile providers?
 - ◆ What impact, if any, would this have on their likelihood to switch/keep their number?
 - ◆ How much would you be prepared to pay?

6) CLOSE

- Any other thoughts or suggestions you would make?
- If you were Ofcom, how big an issue do you think number porting is?

DISCUSSION GUIDE - MYSTERY SHOP DEPTHS (CONSUMERS) V1, 10TH JANUARY 2009

This research document is designed for qualitative research, therefore:

- *This document is a guide only, moderators would not necessarily adhere to the exact structure or wording of the document - and would need to adapt the language as appropriate to each individual respondent*
- *Sections will be covered in an order that is most effective for obtaining the information in each session - it may be more effective to cover later sections earlier in the discussion if it helps respondents verbalise their thoughts/needs states*

1. INTRODUCTION TO THE SESSION (2 MINS)

- Introduce Jigsaw and self
- Explain purpose of research: I understand that you are planning on switching mobile provider in the next week or so, we are conducting some research into how this process works and how easy it is to do at the moment.
- MRS Code of Conduct, confidential and anonymous discussion
- Explain that this is an open session: there are no right or wrong answers.
- The moderators have no vested interest in the services being researched
- Advise that Ofcom has commissioned Jigsaw for this research

2. EXPLAIN PROCESS (5 MINS)

Stage 1: A 45 minute in-depth interview - which is taking place this evening and will be to discuss your plans for switching your mobile phone, including why you are doing it and how you plan to go about it.

Stage 2: We are then going to ask you to record your experiences of the switching process over the next few weeks. We would like you to make a daily record of what you do with regard switching, including how you feel and how you find the process.

Stage 3: At the end of this period we will follow you up with a 45 minute in-depth interview. At this point you should have made your decision about switching and we will be discussing your experiences in more depth.

3. WARM UP (5 MINS)

- Household description: who else they live with, type of property (home owners vs. renting), how long they have been there
- Current mobile phone provider
 - ◆ How long been with

- ◆ How much pay - what is included
- ◆ PAYG vs. contract
- Who else involved in decision-making for mobile phones (sole decision maker/make decisions with family, friends etc.

4. OVERALL DECISION MAKING FACTORS

For the rest of this discussion we will be focussing on gathering information about your mobile phone use, and what would be important to you when considering switching your mobile phone provider.

- Can you briefly talk me through your usage of mobile phones services including:
 - ◆ How you use each service - frequency and types of activities undertaken
 - ◆ How large is your calling circle?
 - ◆ How do you select when you use your mobile vs. your landline vs. computer to make calls?
 - ◆ Why did you initially choose your current provider of each of these services?
- In general, how important would you say each of these services is to your everyday life overall and why?
 - ◆ How would you react if it was taken away?
 - ◆ What would be your biggest frustration?
- Aside from this current occasion, have you switched provider or seriously considered switching in the last two years?
 - ◆ When was this?
 - ◆ What prompted this decision?
 - ◆ How important was it to you at the time to switch?
 - ◆ What did you hope to achieve by making this change?
 - ◆ Did you ultimately end up switching?

5. UNDERSTANDING PLANS FOR SWITCHING IN FUTURE

Next I would like to explore your current plans for switching mobile providers.

- Which service do you anticipate switching?
- Why do you want to switch?
 - ◆ What are the key factors which are encouraging you to switch?
 - ◆ What prompted this decision? What was the final straw?
 - ◆ What do you hope to achieve by making this change?
- To what extent are you clear on which provider you plan to switch to at this stage?
 - ◆ Why/Why not?
 - ◆ IF KNOW
 - Why have you selected them as your new provider?

- How have you found this out?/How much research have you done to-date?
- ◆ What types of factors are you considering/will you consider in deciding which provider to switch to?
- ◆ What factors are important to you in the decision process of whether to/not to switch?
 - Which are the must have elements in any new contract/when you switch?
- Do you know when your existing contract expires? How do you know this?
- How important it is to you to switch mobile phone providers?
 - ◆ How likely do you feel you will be to end up switching providers vs. renegotiating you contract with your current provider?
 - ◆ What are the benefits and drawbacks of each scenario?
- What do you see as the main barriers to switching - in other words, the things that might make switching difficult or put you off?
 - ◆ What has put you off in the past?
 - ◆ What are your concerns going into the process?
 - ◆ Which elements do you anticipate being most difficult?
 - ◆ What, if anything, might put you off switching providers?

6. UNDERSTANDING OF THE PROCESS

- How easy do you anticipate it being to switch providers?
- How long do you think the whole process will take?
- How clear are you on how the whole process works?
 - ◆ How do you know this?/How do you anticipate finding this out?
 - ◆ To what extent is this/is this not an issue?
- What sort of contact do you anticipate having with your existing provider during the process? Why?
- What are the various stages you anticipate going through in the switching process (in generic terms)
 - ◆ Researching providers
 - ◆ Making decision
 - ◆ Calling up existing provider
 - ◆ Cancelling existing contract/making the decision
 - ◆ Actual switch over
- Which of the following do you plan to do when you switch providers? PLUS FOR EACH - Why/why not?
 - ◆ Researching deals available on the Web
 - ◆ Calling up your existing provider to inform them?

- ◆ Calling up your existing provider to see if they can match the deal/offer you an improved package?
- ◆ Take your existing mobile number with you
 - How important is this to you?/Where does this fit with the other factors mentioned earlier as important?
- Which elements of the process do you think will be the greatest pain points
 - ◆ Are there any which you think might delay things/cause problems? Why?
 - Are there any elements you are concerned about?
 - Are there any elements you are not sure about how to tackle/go about? (PROBE ON TAKING NUMBER WITH THEM IF NOT MENTIONED)
- Based on what you know now, is there anything at this stage that you think could improve the switching process/make it easier to switch?
 - ◆ What would you like to see changed?

THANK AND HAND OUT DIARY. ENSURE ARE CLEAR ON HOW TO COMPLETE AND THAT HAVE CONTACT DETAILS IF THEY HAVE ANY ISSUES/QUERIES DURING THE PROCESS. ARRANGE FOLLOW UP INTERVIEW.

STRESS THAT IT IS IMPORTANT THEY GO THROUGH THE PROCESS OF SWITCHING TO A NEW PROVIDER AS THEY WOULD DO NORMALLY, INCLUDING DECIDING NOT TO SWITCH IF IT ALL BECOMES TOO DIFFICULT OR SOMETHING HAPPENS TO CHANGE THEIR MIND.

B. Stimulus

Process for transferring mobile number to a new mobile network operator



Contact your existing mobile network provider to request a PAC code – you can choose how you do this. This code is required by your new provider.

If you phone your existing provider, you may be put through to their retentions team, who will try to convince you to stay.

Once requested, your existing provider must provide you with the PAC code. The way the code is issued by mobile network provider



The PAC code is valid for 30 calendar days – this means you must contact your new mobile network provider within 30 days of when it has been issued to you



Contact your new mobile network provider (by phone, at the shop, or online), and supply them with the PAC code, requesting that you switch to them and keep your old number.



You are switched to the new network then your old number is transferred over. Your new provider may issue you with a new sim card, or a temporary phone until your number has been transferred.

The period from contacting existing phone provider, and obtaining the PAC varies, depending on the method of request and issue for the PAC. **It may take 1-2 days, or longer if requested by post and issued by post.**

up to 30 days

The period from when you contact your new provider, to when your old number is switched over, is typically **at least two full working days**

Option B1



- Able to request/receive your PAC number via any method - i.e. phone, email, online, post, SMS, fax etc

VS

- Your current mobile network provider chooses how you receive your PAC number

Option B3



- Having a dedicated means of obtaining your PAC number which is only able to issue the number (e.g. a dedicated phone line)

VS

- Having the option of your existing operator being able to make you a better offer when you contact your provider to obtain the PAC number

Option B4

- Change is less than two days from when they contact a new provider - within 48 hours

VS.

- The change takes a minimum of 2 days from when they contact a new provider

Option X

- You have to call an automated number to request the PAC code from your existing provider
- Your PAC code is issued to you by text
- Go to your your new providers shop and give them the PAC code (getting the new phone or SIM at same time)
- Five days later your new number is transferred across to your new provider

Option E



- You contact your new provider (either by phone, online or in a shop) and ask to switch over to them keeping your existing number. You will need to supply the existing provider account name, account number & other identification material
- The PAC number is not issued to you, it is up to your existing provider to provide it to the new provider
- Two working days after your request to the new provider, your existing number is transferred across to the new network (potentially on a new phone or SIM)

Option L



- Go to the new providers store and ask to switch over to them keeping your existing number. You will need to supply your account name, account number and complete a standard identification check on site.
- The PAC number is not issued to you, it is up to your existing provider to provide it to the new provider
- One working day later, your existing number is transferred across to the new network (potentially on a new phone or SIM)