

# Non-geographic calls services (NGCS) implementation

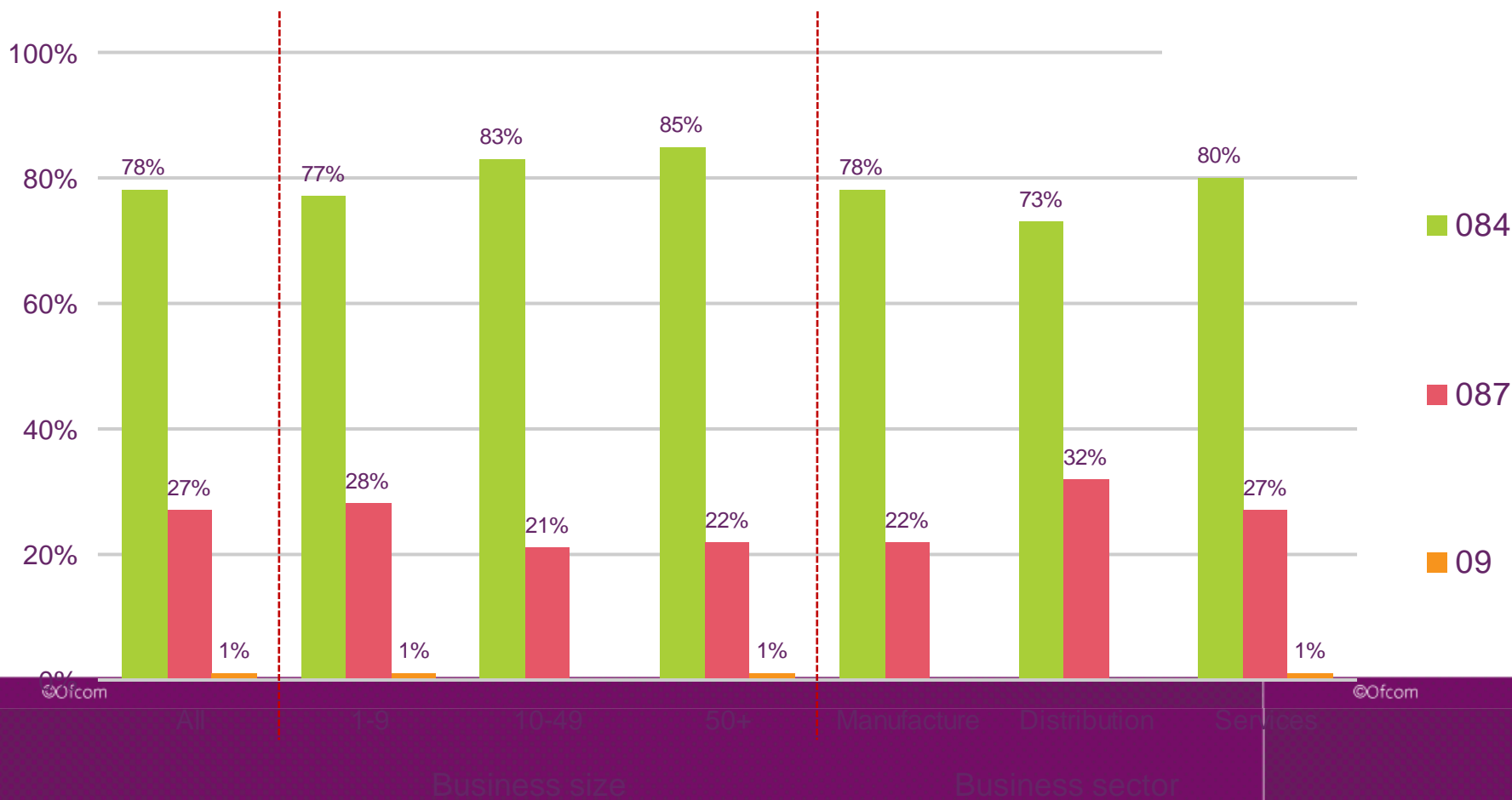
Service Provider (SP) awareness and preparedness  
research – Wave 2

22<sup>nd</sup> April 2015

- Ofcom and the UK telephone industry are working together on making some significant changes to non-geographic number (NGN) pricing transparency - to 084, 087 and 09 numbers.
- The proposed changes are designed to address consumer confusion about the cost of calling service numbers and consumer concerns about the revenue generating nature of NGNs - by delivering clearer pricing for 084, 087 and 09 calls.
- After June 2015, consumers calling NGNs will have access to information on the total cost of the call and how the cost splits between:
  - The access charge - the fixed charge set by their call provider/telecoms company
  - The service charge - the cost set by the company or organisation they are calling
- Telephone call providers are responsible for communicating to their business customers who use NGNs both the level of the service charge and the obligation for cost transparency. Once agreed, the service provider will be obligated to specify its service charge wherever it advertises or communicates the NGN once these changes are made.
- Research was required to measure awareness and readiness of service providers for these changes.

- **Wave 1 (November to December 2014)**
  - Initial stage screening 1,050 businesses to establish the incidence of use of NGNs
  - Stage calling known users of 084 and 087 (sourced from Experian and Dun & Bradstreet)
  - Interviews conducted with 303 users of 084 and 300 users of 087 – 576 interviews in total
- **Wave 2 (March to April 2015)**
  - Interviews conducted with 304 users of 084 and 208 users of 087 – 482 interviews in total
  - Achieving as many interviews as possible from the 087 contacts available
- All interviewing conducted by telephone, with the interview taking around 8 minutes to complete
- Excluded self-employed and any central/ local government or government agency
- Data weighted to the correct profile of users

Among NGN users, around 8 in 10 use 084 and just under 3 in 10 use 087. Very few use 09.



Q1. Can I just confirm that your organisation uses or has recently used any of the following non-geographic phone numbers?

Base: All identified as 084/087 users, 482

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2015

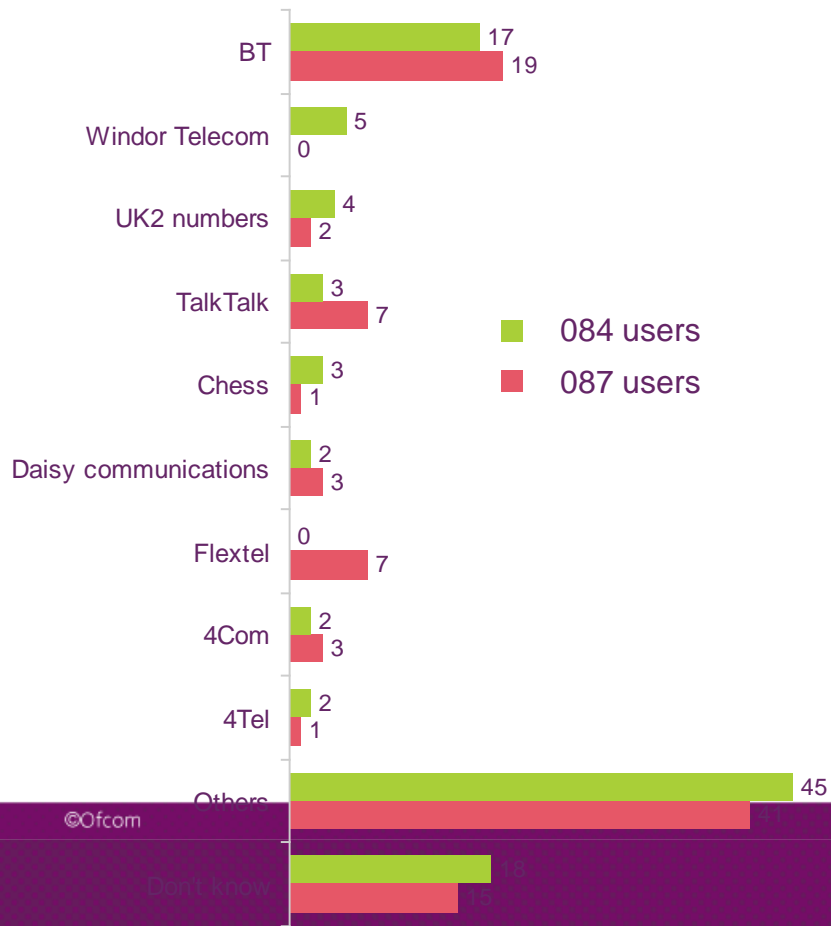


Fragmented market of NGN providers, and around one in six don't know who their TCP is.

Larger businesses more likely to have multiple distinct NGNs



Providers used for 084 or 087



Number of distinct 084/087/09 numbers held



Q5a/b. Can you tell me which telecoms provider you use for you 084/087 non-geographic number?

Q6a/b/c. How many distinct 084/087/09 numbers do you have with [provider]?

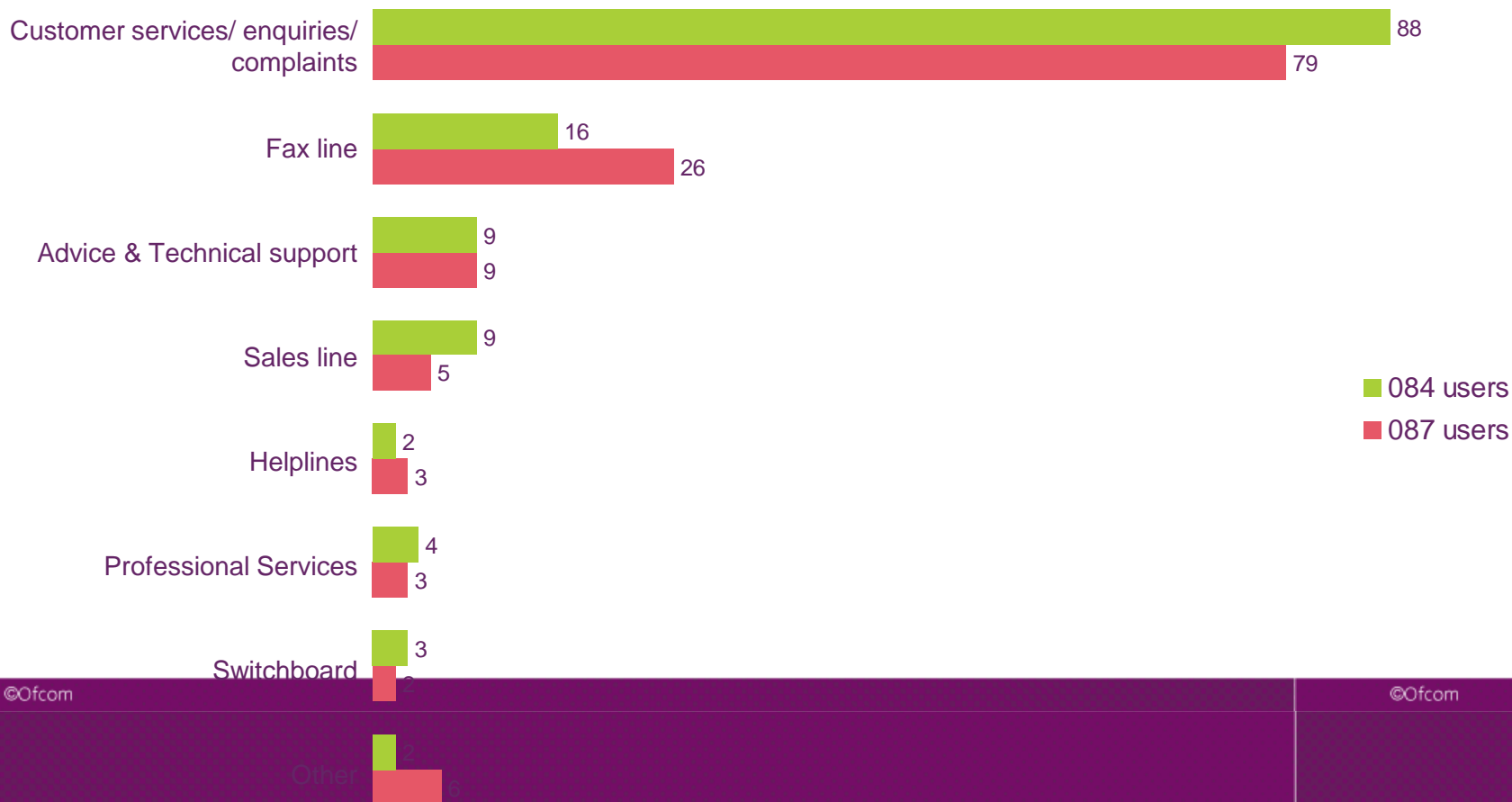
Base: All identified as NGN users, 482

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2015





## Types of services provided through 084/087 number



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Q7a/b. What types of services are provided through your 084/087 numbers?

Base: All identified as 084/087 users, 482

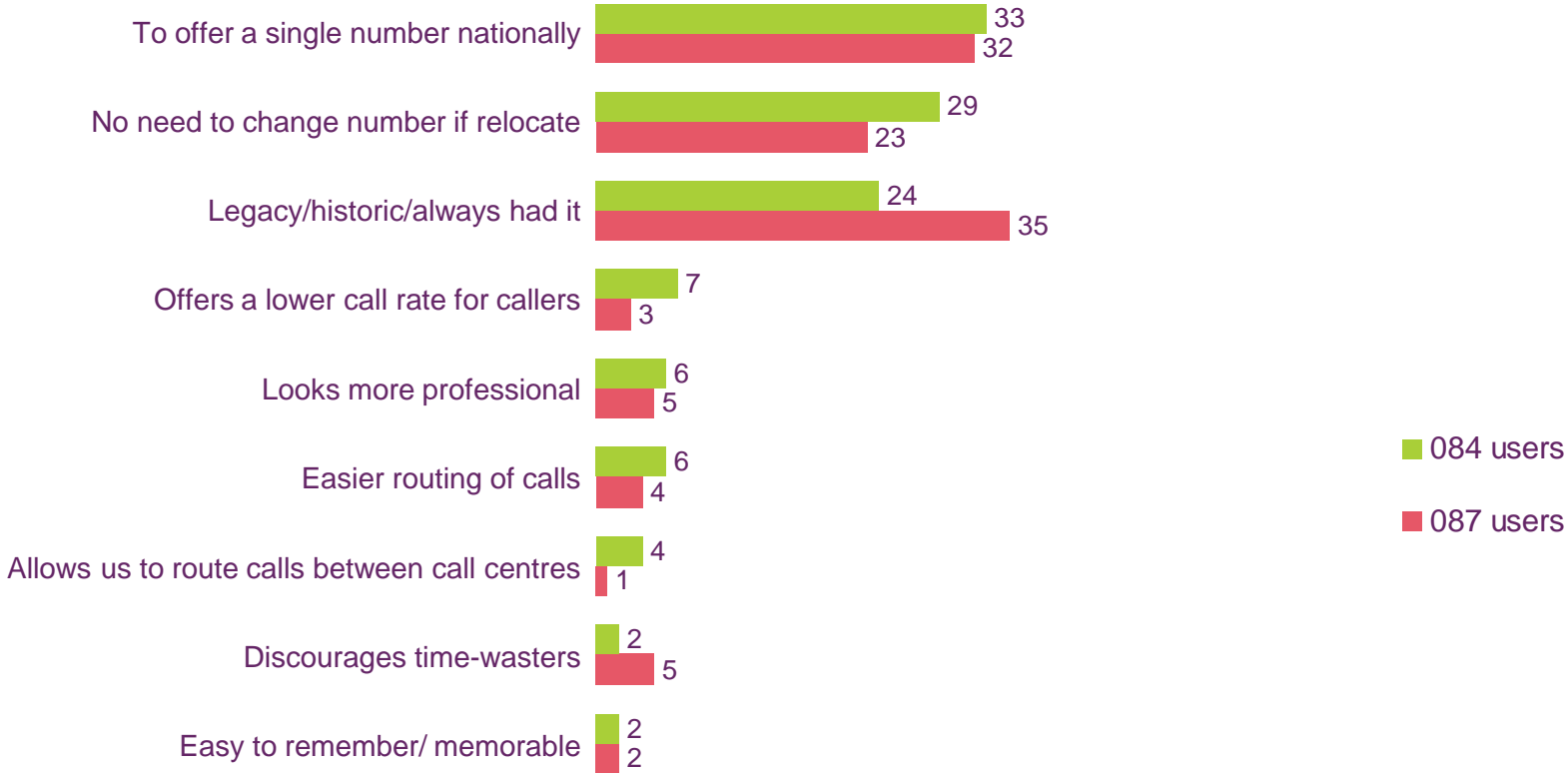
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2015



# Main drivers for using an NGN are to offer a single number nationally and no need to change numbers if the business relocates



## Why use NGNs instead of geographic numbers?



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Q8a/ b. Why does your company use an 084/ 087 number rather than an 01,02, 03 geographic number?

Base: All identified as 084/ 087 users, 482

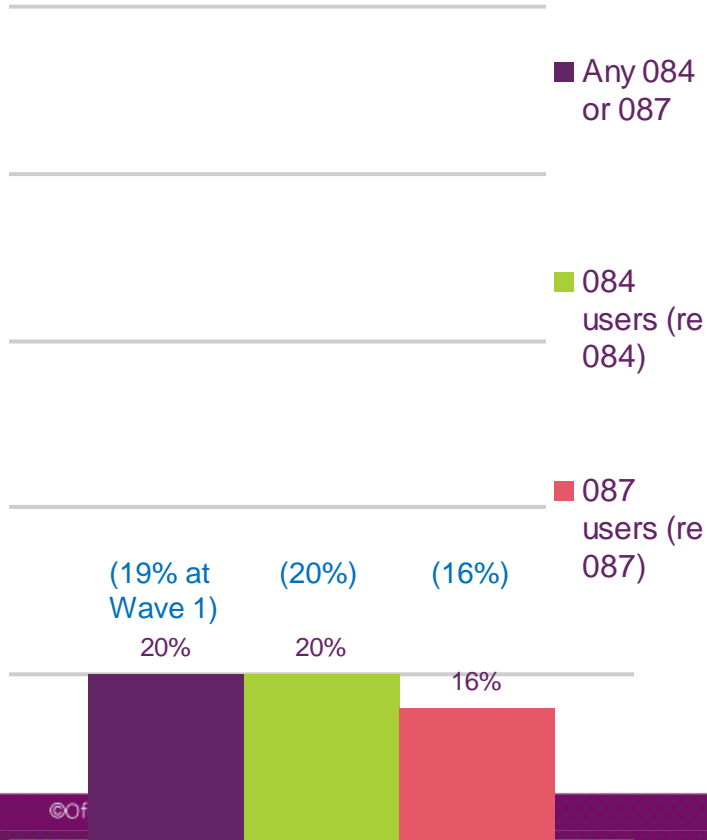
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2015



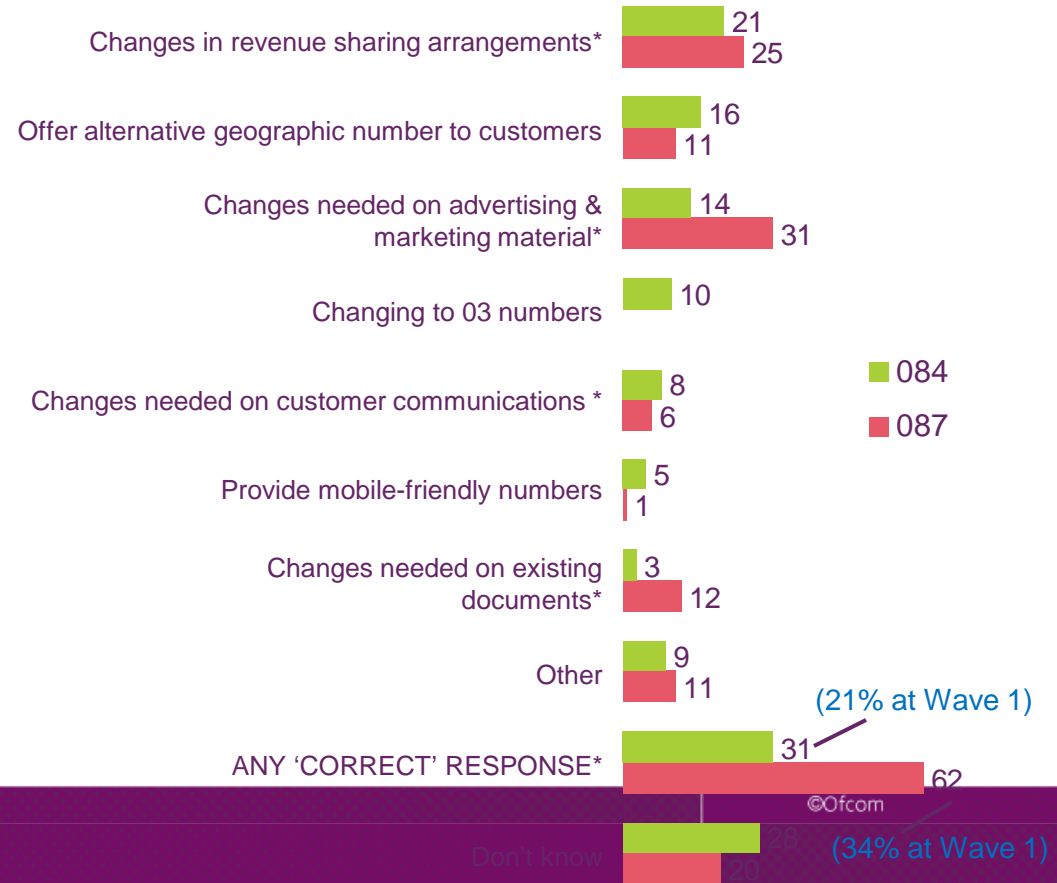
Awareness of forthcoming changes – with no further details provided – remains at one in five NGN users. Most aware of 087 changes give a ‘correct’ response, but lower for 084



Aware of any changes (unprompted)



What changes expect (among those aware unprompted)



Q9. Are you aware of any forthcoming changes being made to 084/087/09 numbers that will affect companies like yours that use them? If yes, which numbers

Q10a/b. Could you tell me what changes you expect from your 084/087 numbers? All those aware

Base: All identified as 084/087 users, 482/ Those aware of forthcoming changes (084 n= 86, 087 n=39 CAUTION – LOW BASES)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2015



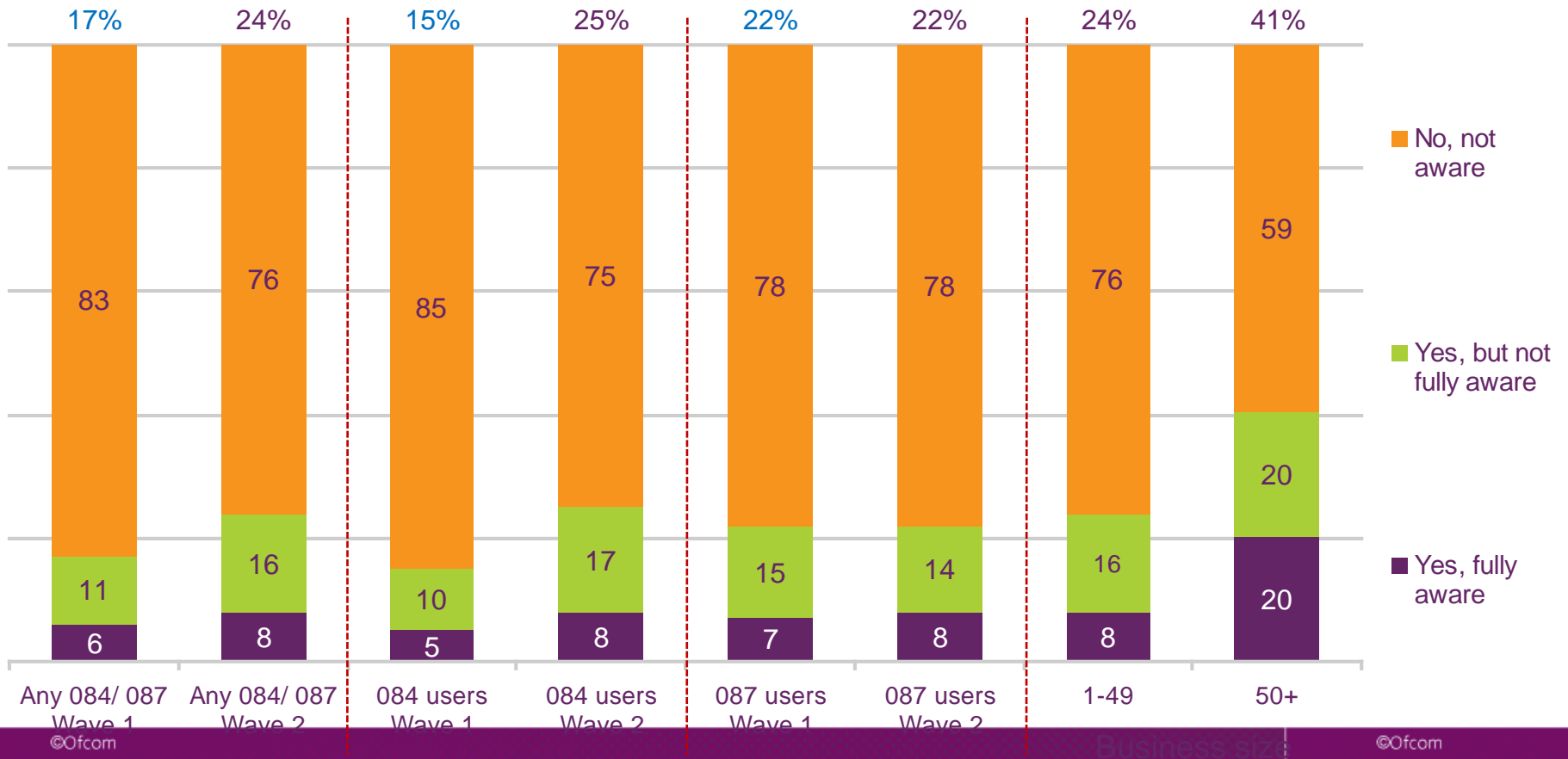


One in four NGN users are aware of changes when prompted with full details (up from one in six).

Over half say this was through their telecoms provider, around one in five from industry or media



Prompted awareness of changes



Within the 20% aware unprompted, 5% were not aware when prompted

Q11. PROMPT WITH DESCRIPTION OF CHANGES. Before today, were you aware that these changes are due to take place?

Base: All identified as 084/087 users, 482

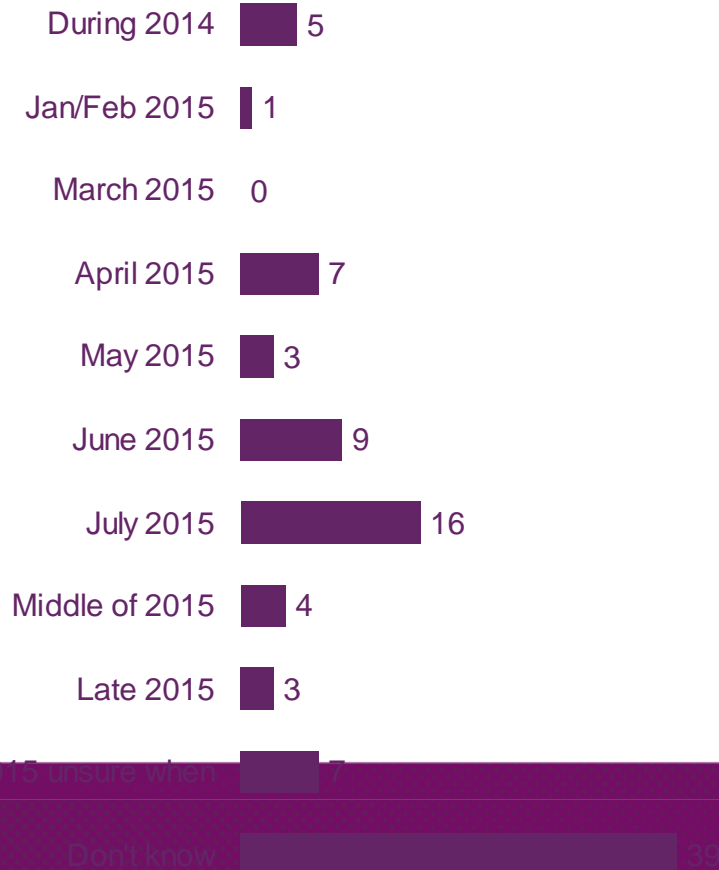
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2015



Of those aware after prompting, little consensus as to when the changes will come into effect.  
Increase in mentions of June/ July 2015 (from 15% at Wave 1 to 25%)



*When changes will come into effect (among those aware when prompted)*



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Q13. Could you tell me when you think these changes will come into effect?

Base: Those aware of the changes after being prompted with full details of the changes, 126

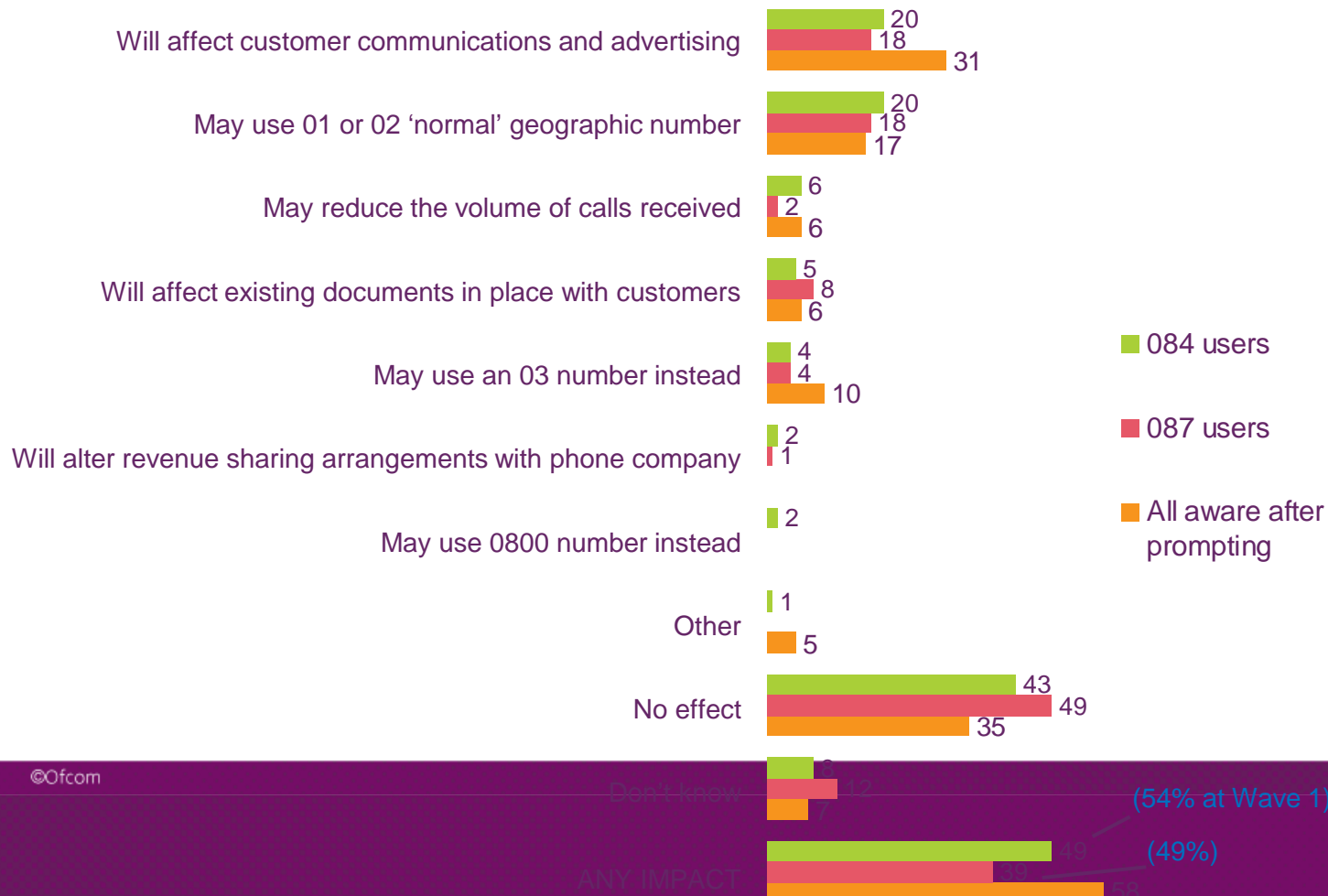
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2015



Around half of all NGN users can name any impact the changes will have – six in ten among those aware of the changes when prompted (at Q11)



*Impact changes will have on business (All users, after prompting)*



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Q14. What impact will these changes have on your business?

Base: All identified as 084/087 users, 482. All aware of the changes when prompted (126)

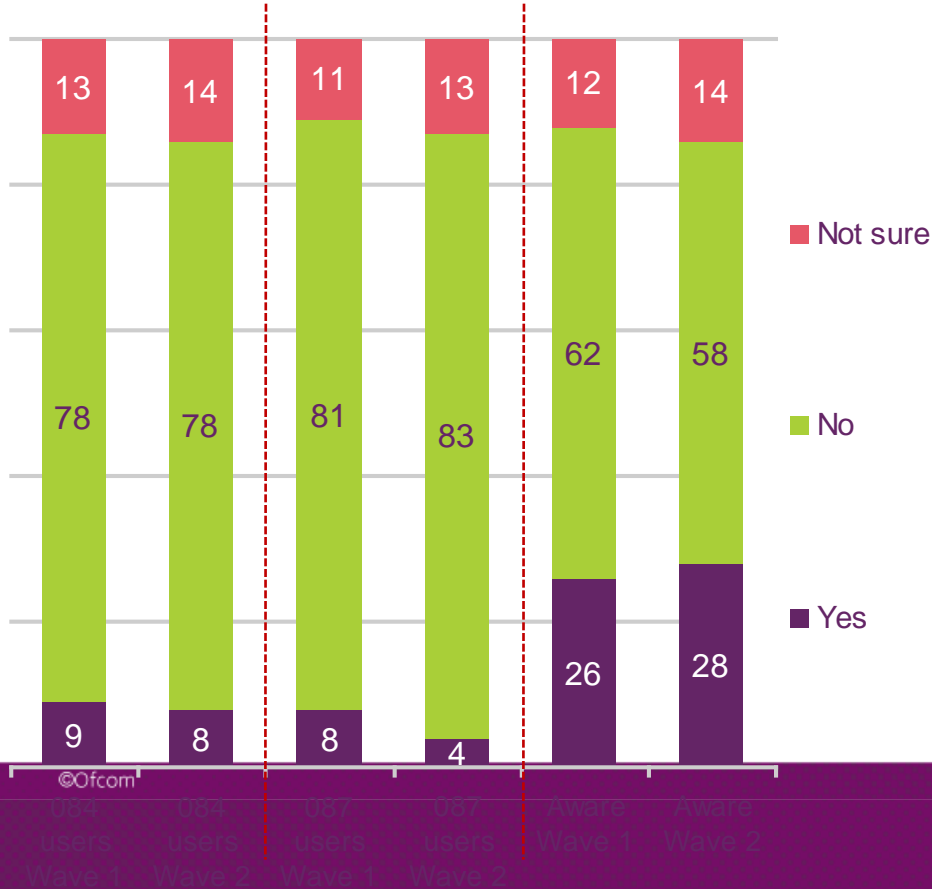
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2015



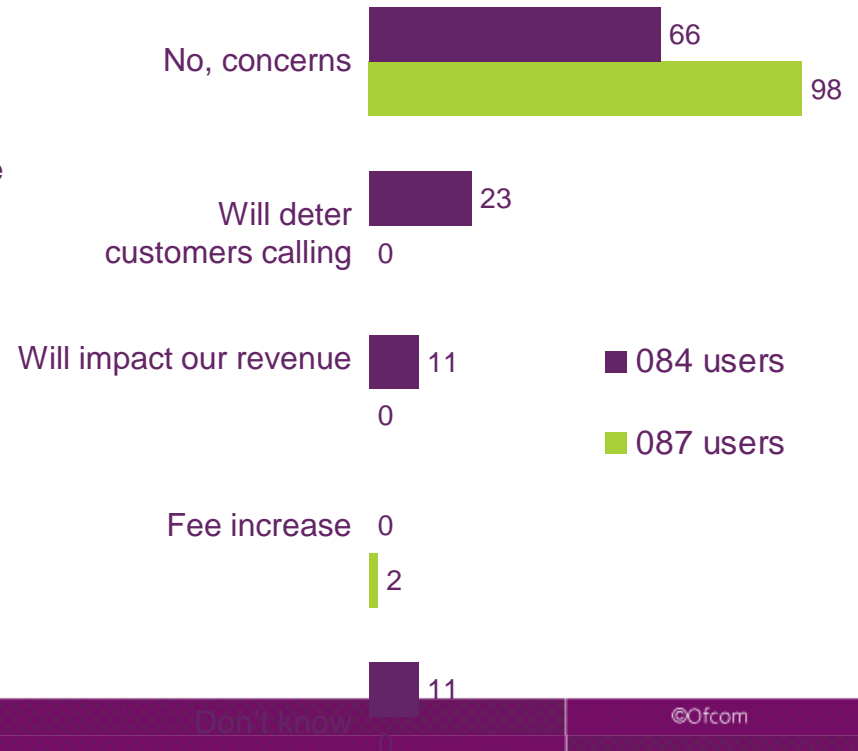
Fewer than one in ten NGN users and around one quarter of those aware say they've been informed about the service charge by their TCP – with no increase since Wave 1. No others have been told when this information



Whether TCP has informed about service charge



Any concerns about charges  
\*\*Caution – Very low bases\*\*



Q15a/b. Has your telecoms provider [name] informed you what the service charge will be on your 084/087 number?  
Q16a/b. Do you have any concerns about those 084/ 087 charges?

Base: All identified as 084 users, 304, All identified as 087 users 208, All aware of the changes when prompted (126). All those informed of service charges on 084 n=25, All those informed of service charges on 087 n=13

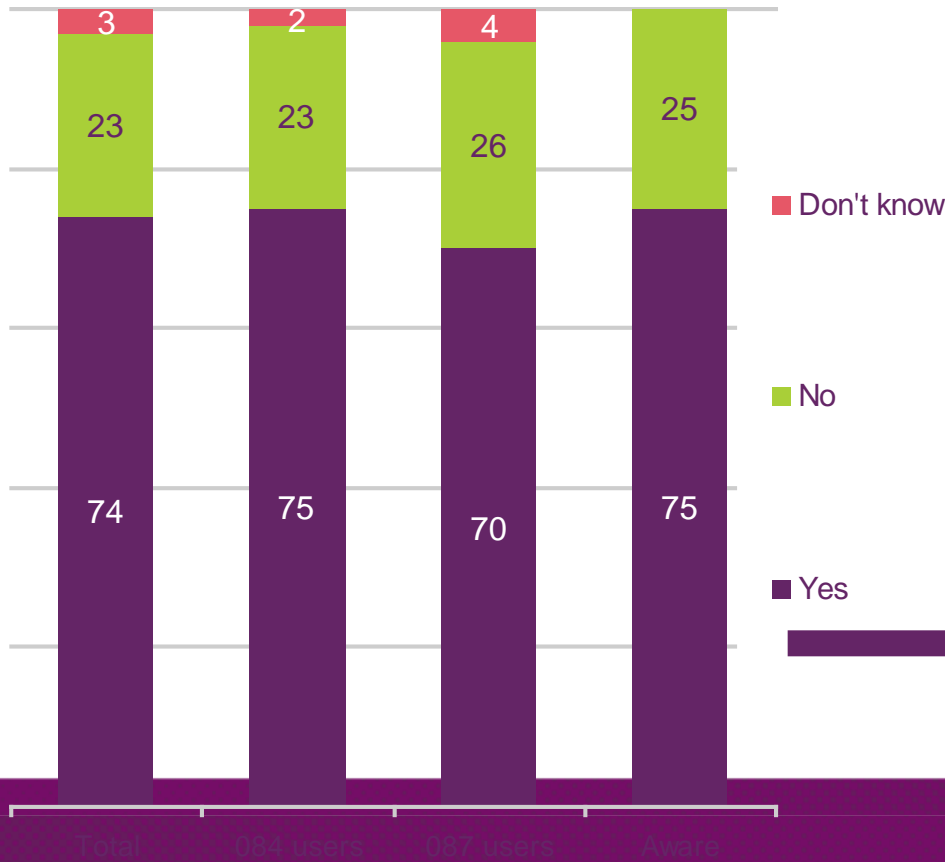
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2015



Three in four NGN users advertise or publish their NGN and fewer than 1 in 10 of these say they're aware of the obligation to publish these details – both measures unchanged since Wave 1. Close to four in ten of those



Whether business publishes NGN



Awareness of obligation to publish cost details



Q18. Does your firm show your non-geographic numbers in any printed, broadcast or online advertising or promotional material?

Q19. Once the changes come into effect, your firm will be obligated to publish the details of the cost of calling the service number in all of the material, where the number is shown or broadcast. Were you aware of this obligation to publish these details before today?

Base: All identified as 084 users, 303, All those who publish their 084 number n=249, All identified as 087 users, 300, All those who publish their 087 number n=207. All aware of the changes when prompted (126), all those aware who publish their 084/087 number (93)

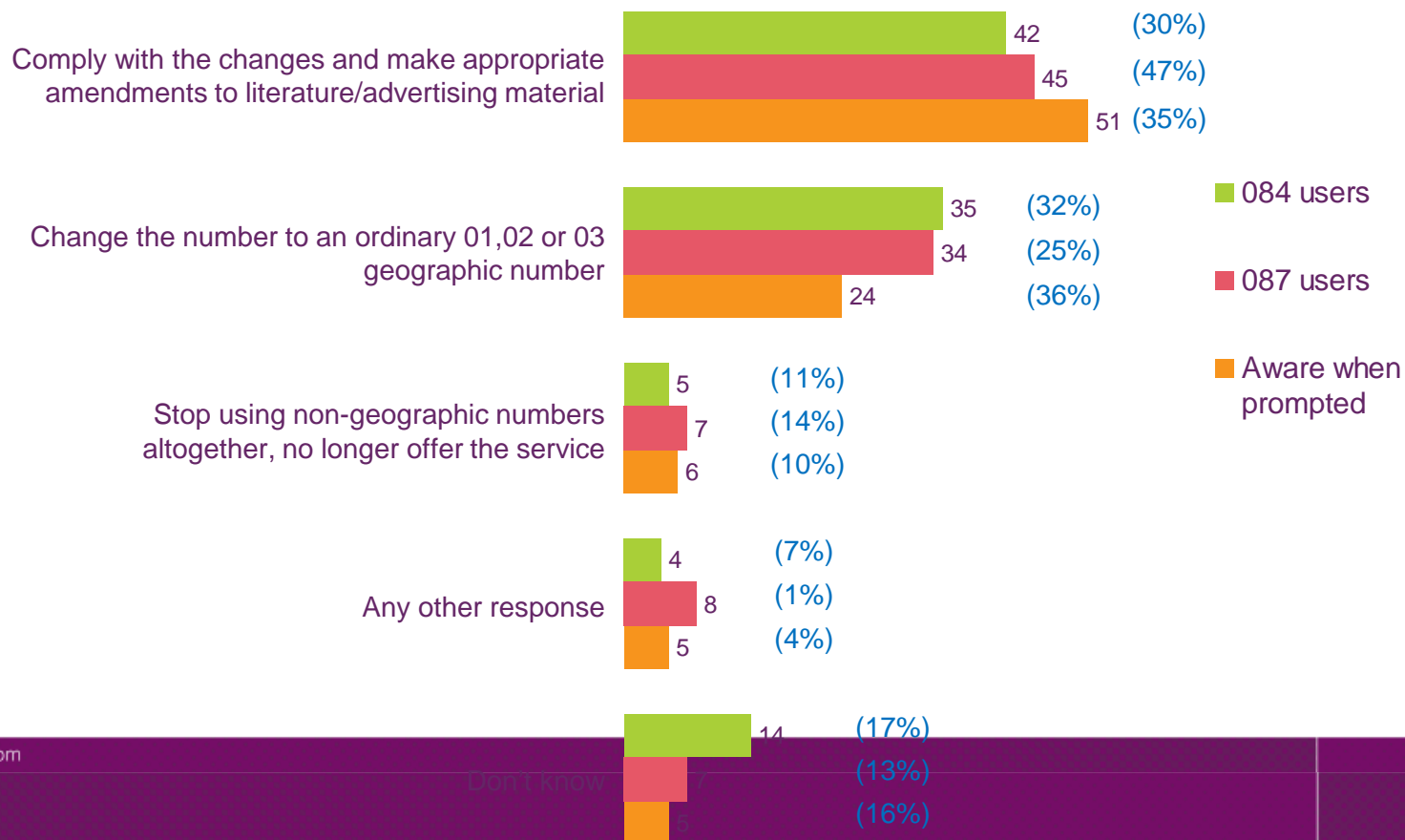
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2015



Around half say they will comply with the changes to published numbers, while one-third say they will change to a geographic number. Increase in 'comply' for 084, no changes for 087. those aware are more likely to say



### Options that best describe how business will deal with changes



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Q20aa/ ab. Given the potential effect of these changes, which of these options best describes how your business will deal with this on your 084/087 number/s. Will you...

Base: Those with an 084/ 087 number printed or published (229 084, 147 087). All those aware who publish their 084/087 number (93) .

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2015



# More 084 users say their firm will be at least partly ready to comply since Wave 1, but no change for 087 users



Whether will be ready to comply with these changes by the end of June 2015



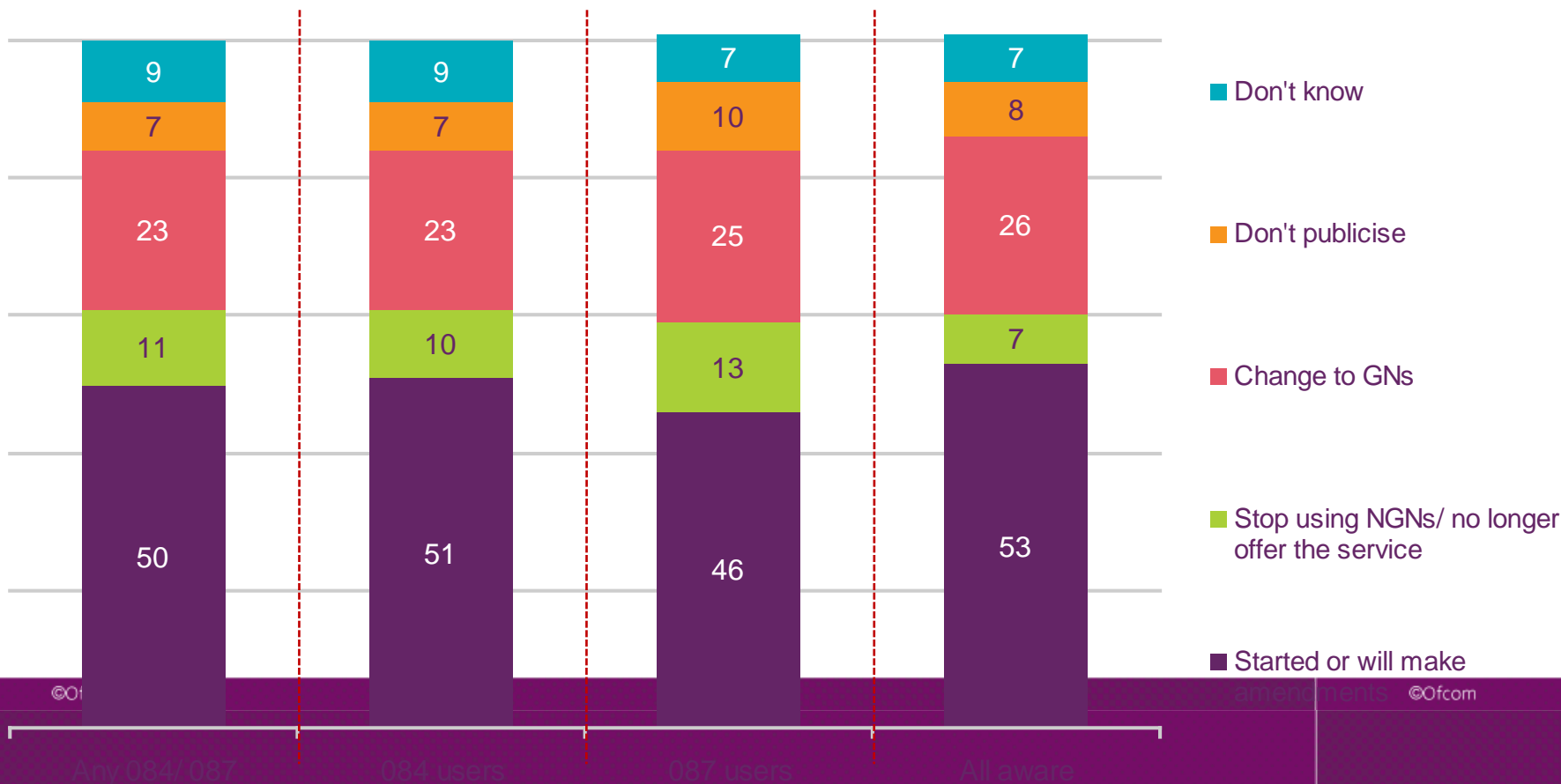
Q22a. Do you think your firm will be ready to comply with these changes to non-geographic call charges by the end of June 2015?  
 Base: All identified as 084/087 users, 482. All aware of the changes when prompted (126)  
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2015



Close to half expect to comply through making the amendments, with the next most likely outcome being a change to geographic numbers



Overall summary



Q21. Has your firm started to make the necessary changes/ Q22a. Do you think your firm will be ready to comply with these changes to non-geographic call charges by the end of June 2015?/ Q22c. And how do you think your firm will comply, what will you do?

Base: All identified as 084/087 users, 482. All aware of the changes when prompted (126).

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in March to April 2015





- Overall 20% claim (without further prompting) to be aware of any forthcoming changes being made to 084/ 087 numbers affecting users
  - No change in unprompted awareness since Wave 1 (November/ December 2014)
- Among those saying they are aware of any forthcoming changes, a minority give a 'correct' description
- When prompted with all details, one quarter (24%) are aware of the upcoming changes (8% fully, 16% not fully)
  - An increase since Wave 1 (17%) due to 084 users (from 15% to 25%)
  - No change for 087 users (22% at both waves)
  - Higher awareness among larger businesses (41%)
- Around one quarter of those aware know when the changes come into effect.

- There remains a mixed reaction to the changes across all users – around half can name any impact the changes will have.
- Fewer than one in ten say they've been informed about the service charge by their TCP and no others know when this information will become available
- Three in four users advertise or publish their NGN, but fewer than 1 in 10 of these are aware they will be obligated to publish details of the cost of calling the service number – as was also the case at Wave 1
- No real difference between NGN users in terms of likelihood of complying with published numbers, changing to a geographic number or stopping to offer the service concerned
- Since Wave 1, an increase for 084 users in saying their firm will be ready to comply by the end of June 2015
- Across all users, half say they have made or will make amendments, one quarter will change to geographic numbers, one in ten will stop offering the service