# Non-Geographic Numbers: Materials Cost Study
**Reference: Document 17/70d**

Prepared for

Commission for **Communications Regulation**

PREPARED BY:

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# Introduction

# Research Methodology - Sample

- Fieldwork for this study was conducted from May 2017 - July 2017.

- Survey data collection was administered via online and telephone interviewing from B&A's call centre in Milltown, Dublin.

- Interviewing was conducted in two parts:

**Part 1**
- Telephone scoping survey to identify the relevant contact within each organisation. As the focus of the research fell across telecommunications, marketing and stationary supply, organisations were first contacted by telephone in order to identify the most appropriate contact(s) within each organisation.

**Part 2**
- Telephone or online interview completion. Once the correct contact was identified the option was given to complete the survey by telephone or online. In total 42 respondents completed the survey by telephone, while 18 were emailed a link to the survey and completed it online.

# Research Methodology - Sample

- Due to the range of aspects which were covered in the questionnaire it was necessary for a number of people/departments within organisations to contribute to survey responses. Hence, a number of follow up emails and telephone calls were required to prompt organisations to complete the survey.

- At data analysis stage both the telephone and online samples were merged and weighted in line with the known profile of NGN organisations, which was identified as part of the 2016 study investigating the use of NGNs among Irish businesses. The 2016 research was also conducted by B&A and the Research Perspective on behalf of ComReg.

- 60 organisations who currently use or previously used NGNs were interviewed; 50 organisations who currently use NGNs and 10 organisations who previously used NGNs but do not currently.
  - ❖ A robust cross-section of Irish organisations has been interviewed and their data has given us an insight into the range of costs associated with changing/updating materials which display their NGN. We are confident that these cost are strongly indicative of the likely costs, but of course it is very dependent on the size of the organisation and the nature of its business.

# Sample Detail – weighting applied

- Interviews achieved and corrective weighting applied – weighting was based on the known profile of NGN users.

| | No. of Interviews | Weighting applied |
|---|---|---|
| | **60** | **100%** |
| **Total NGN Current users** | | |
| Any NGN | 50 | 100% |
| 1800 | 14 | 37% |
| 1890 | 22 | 40% |
| 1850 | 17 | 28% |
| 0818 | 11 | 14% |
| 076 | 5 | 6% |
| Not current but not previous users | 10 | 0% |
| | | |
| **NGN previously used** | | |
| Any NGN | 34 | 12% |
| 1800 | 9 | 4% |
| 1890 | 14 | 3% |
| 1850 | 14 | 2% |
| 0818 | 5 | 3% |
| 076 | 2 | 2% |
| None of these | 26 | 88% |

| | No. of Interviews | Weighting applied |
|---|---|---|
| | **60** | **100%** |
| **Employees** | | |
| Under 10 employees | 24 | 63% |
| 11-40 employees | 14 | 10% |
| 41-99 employees | 12 | 9% |
| 100-250 | 5 | 7% |
| 250+ employees | 5 | 11% |
| | | |
| **Region** | | |
| Dublin | 32 | 44% |
| Rest of Leinster | 11 | 19% |
| Munster | 12 | 20% |
| Conn/Ulster | 5 | 17% |

# A note on reading the charts

- Base sizes on each chart refer to the unweighted base i.e. the raw number of interviews. The charted data refers to the weighted percentages as this is the percentage representative of all organisations which fall into that category.

- Some sample sizes have been identified as a small base size. These have been asterisked throughout the report. A small base size is 50 responses or less.

- Responses to all survey questions have been included.

- In some cases percentages will not add up to 100%, due to multi-coded responses where a respondent selected more than one response or due to rounding if +/- 1% of 100%.

- One public sector organisation represented a significant outlier in terms of cost information provided. Therefore, results based on a reduced sample have also been included; where this respondent has been removed.

- Chart 14 displays the cost to update materials over the next 0-6 months, please note that the total column has higher percentages in the higher value bands due to the fact that the total column accumulates the individual amounts an organisation will spend across materials, for example, headed note paper and promotional material costs combined. Hence, at a total level the organisation is spending more than the values noted within each individual material type.

# Usage of NGNs

# Most common method for customers/clients to contact organisations

**Base: All NGN organisations (60)**

**Total**

**Base:** **60**
**%**

| | |
|---|---|
| Telephone | 75 |
| Online (email, social media) | 24 |
| Other | 1 |
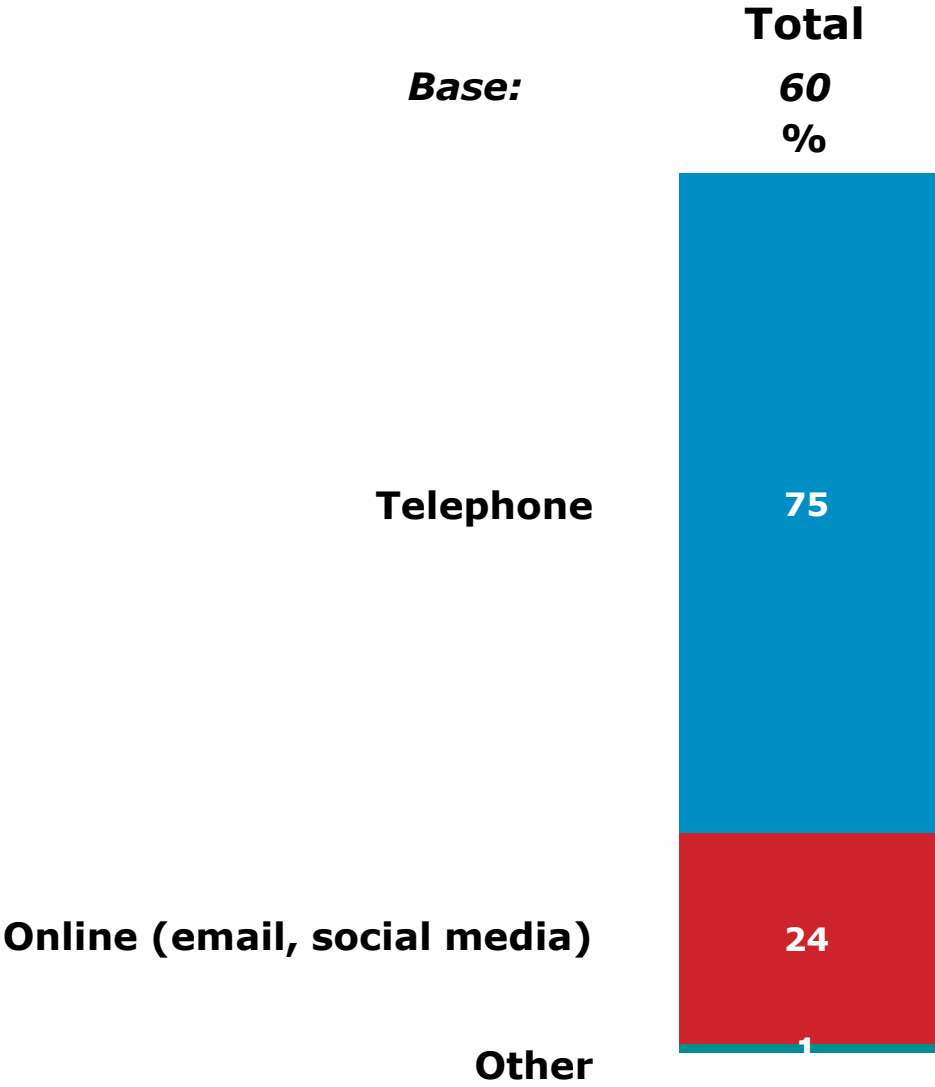
**Customers mainly contact organisatons by telephone.**

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# Current usage of NGNs

**Base: All NGN organisations**

**Total (Base: 60)**

|  | Reduced Sample |
|---|---|
|  | *59* |
| % | % |
| Any NGN — 100 | 100 |
| 1890 — 40 | 38 |
| 1800 — 37 | 35 |
| 1850 — 28 | 28 |
| 0818 — 14 | 14 |
| 076 — 6 | 3 |
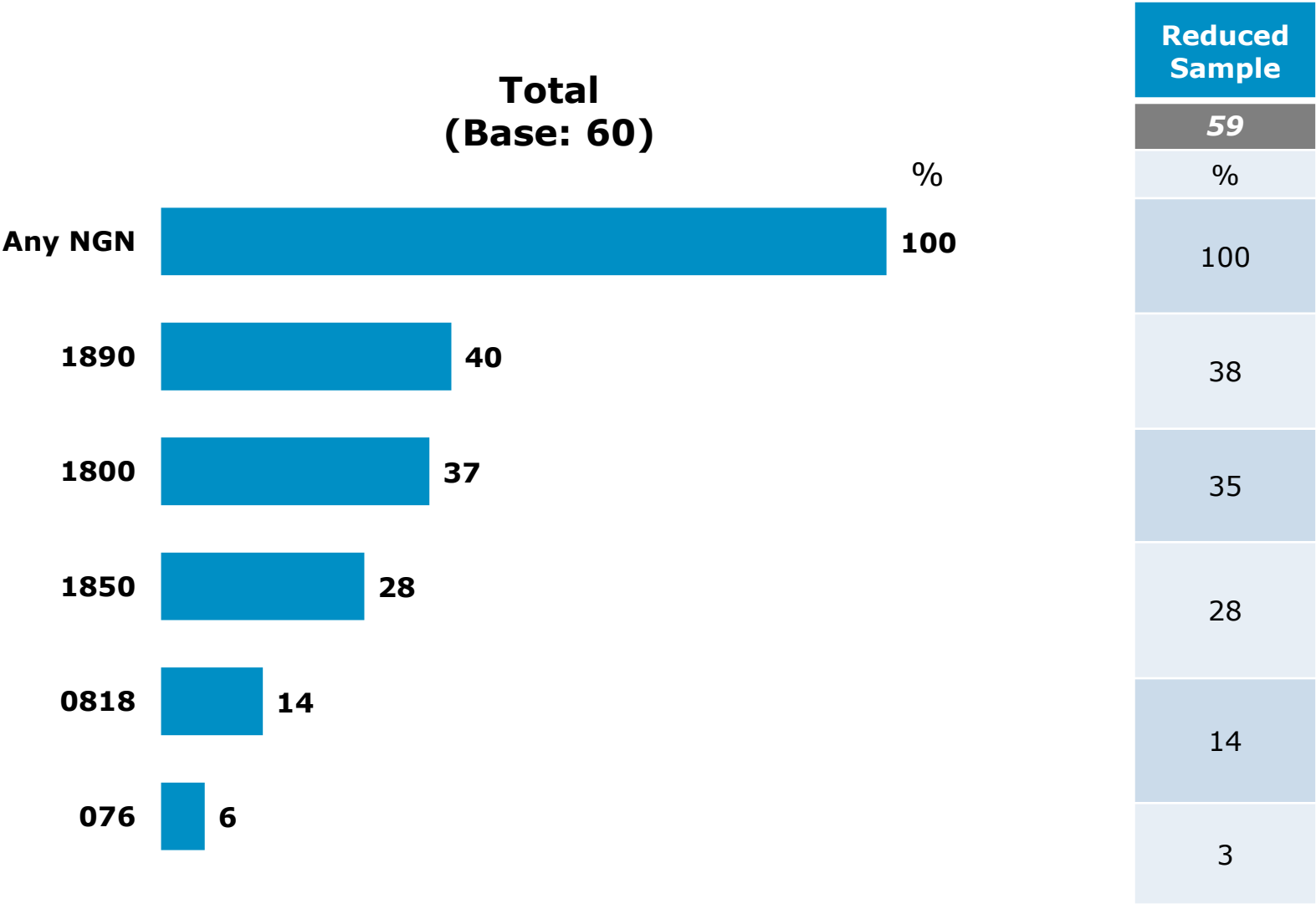
1890 and 1800 are the most commonly used NGNs, followed by 1850.

** *Multiple responses allowed*

- *Current NGN usage was weighted in line with the 2016 B&A/The Research Perspective Non-Geographic Telephone Numbers Organisation study.*

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Q.1 Which types of non-geographic numbers does your organisation currently use

# Previous use of NGNs

**Base: All NGN organisations**

**Total
(Base: 60)**

|  | % | Reduced Sample |
|---|---|---|
|  |  | **59** |
|  | % | % |
| **Any NGN** | 12 | 10 |
| **1800** | 4 | 4 |
| **1890** | 3 | 1 |
| **0818** | 3 | 3 |
| **1850** | 2 | 2 |
| **076** | 2 | 2 |
| **None of these** | 88 | 90 |

**1 in 10 organisations previously used an NGN that they no longer use.**

*\*\* Multiple responses allowed*

- *Current NGN usage was weighted in line with the 2016 B&A/The Research Perspective Non-Geographic Telephone Numbers Organisation study.*

Q.1a Which, if any, of these types of non-geographic numbers has your organisation used previously?

# Materials NGN displayed on

**Base: All NGN organisations**

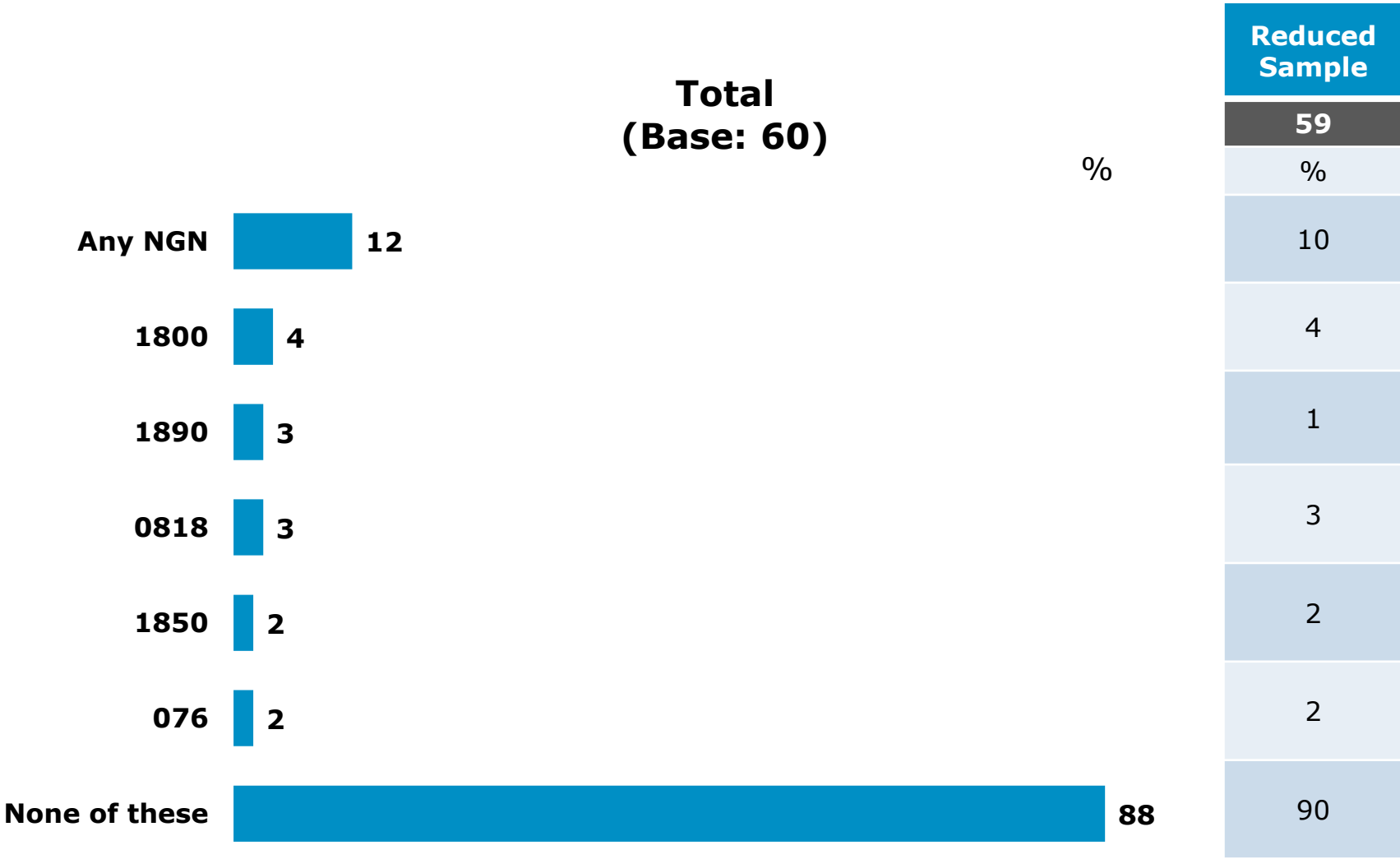| | Total (Base: 60) % | Reduced Sample (59) |
|---|---|---|
| Websites | 96 | 96 |
| Promotional material, such as brochures, etc. | 90 | 90 |
| Headed note paper/ compliment slips, etc. | 67 | 67 |
| Business cards | 65 | 65 |
| Vehicles | 31 | 32 |
| Shopfronts/External Signage | 8 | 9 |
| None/don't display | 2 | 2 |
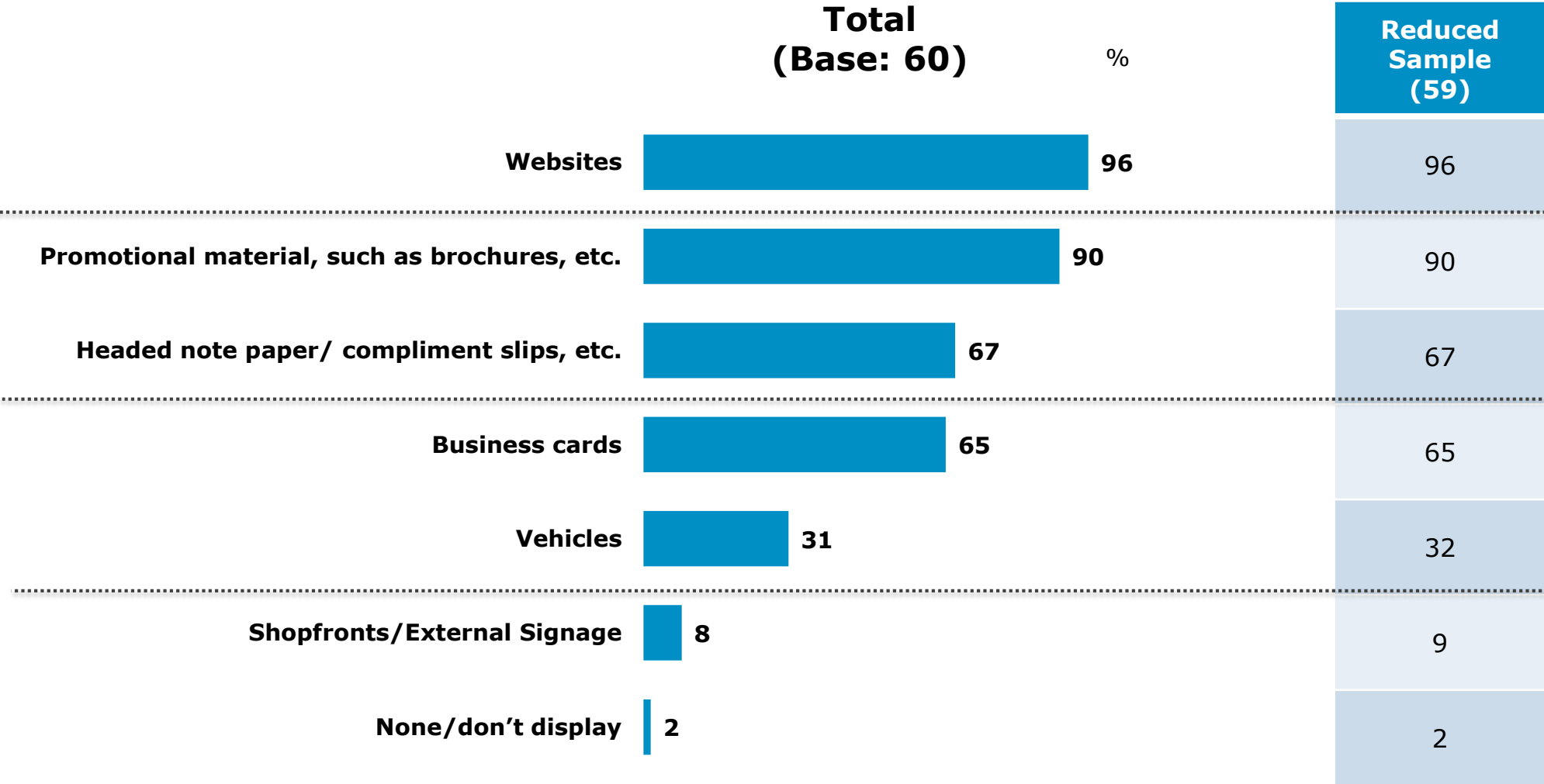
Almost all organisations (96%) display their NGN number on their website, while 9 in 10 organisations display(ed) their NGN on promotional material.  2 in 3 display their NGN on their headed notepaper and business cards, while 1 in 3 display their NGN on vehicles. Just 8% show their NGN on their shopfront/signage.

**?** Q.2 Does or did your organisation display its non-geographic numbers on any of the following?

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# Frequency of updating various materials

**Base: All instances of displaying NGN on specific material**

| Paper Based | | | Non Paper Based | | |
|---|---|---|---|---|---|
| Headed note paper/ compliment slips, etc. | Business cards | Promotional material, such as brochures, etc. | Shopfronts/ External Signage | Vehicles | Websites |
| *37** | *27** | *53* | *9** | *14** | *52* |



Every 3+ years
Every 2 years
Annually
Every 0-12 months
Never

**Headed note paper/compliment slips:** 29, 36, 21, 15
Every 3 yrs: 25%
As needed: 4%

**Business cards:** 34, 38, 24, 4
Every 3 yrs: 29%
Every 5 yrs: 5%

**Promotional material:** 27, 3, 50, 20
Every 3 yrs: 17%
Every 9 yrs: 2%
As needed: 9%

**Shopfronts/External Signage:** 63, 0, 37
Every 3 yrs: 30%
As needed: 33%

**Vehicles:** 71, 1, 28
Every 3 yrs: 26%
4-5 yrs: 24%
9-10 yrs: 21%

**Websites:** 12, 2, 15, 71
Every 3 yrs: 12%

| Average no. of months | 21.02 | 25.69 | 16.81 | 35.99 | 52.36 | 8.21 |
|---|---|---|---|---|---|---|

*Caution small base*

Q.3 Approximately how often does your organisation conduct a print run for the following?
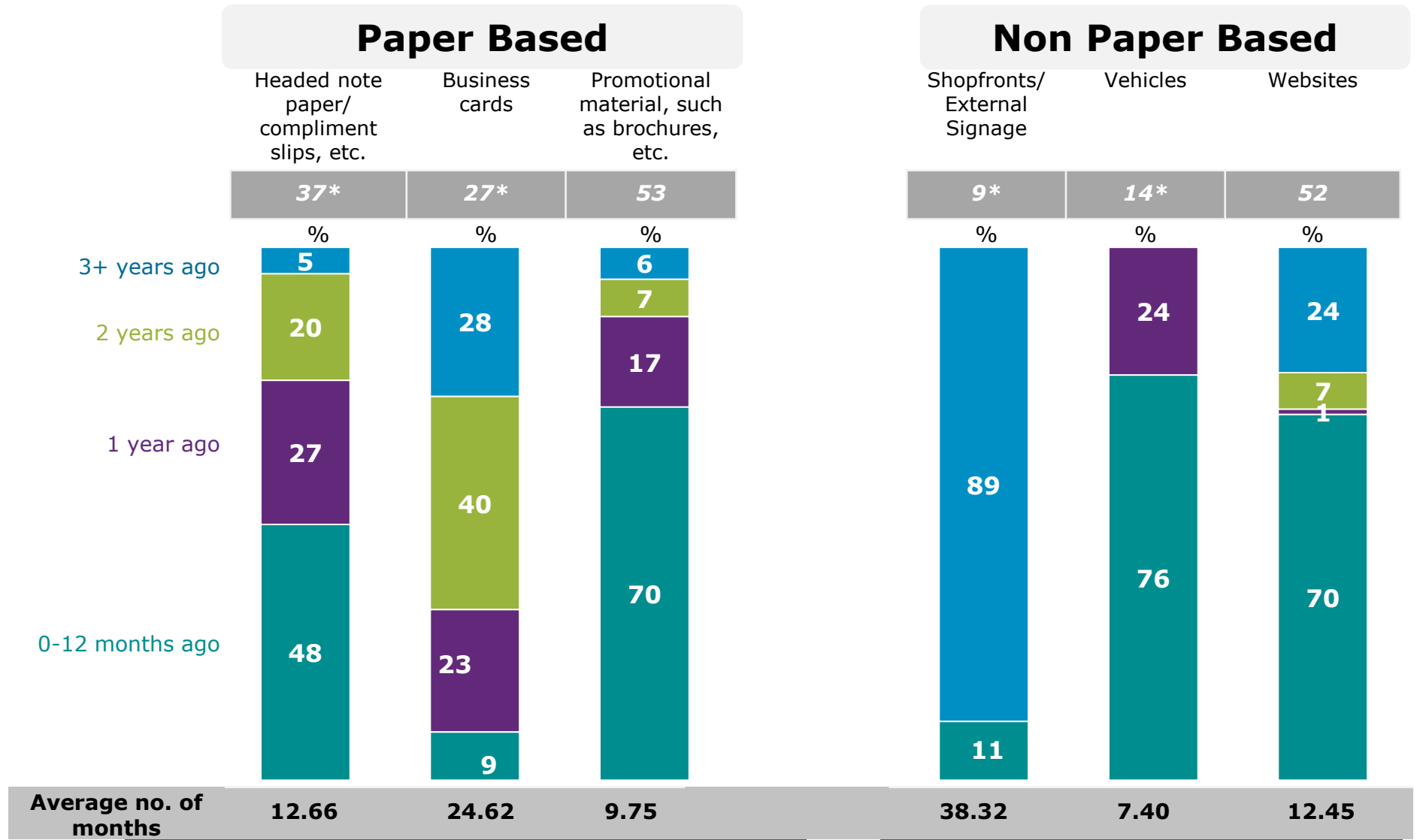
Q.4 Approximately how often does your organisation make changes to/update the following?

**Websites receive the most frequent updates, while shopfronts and vehicles are updated least frequently.**

*Data includes current and not current but previous users of NGNs

# When organisation last ordered updated materials

**Base: All instances of displaying NGN on specific material**

| Paper Based | | | Non Paper Based | | |
|---|---|---|---|---|---|
| Headed note paper/ compliment slips, etc. | Business cards | Promotional material, such as brochures, etc. | Shopfronts/ External Signage | Vehicles | Websites |
| *37\** | *27\** | *53* | *9\** | *14\** | *52* |
| % | % | % | % | % | % |

| | Headed note paper/ compliment slips | Business cards | Promotional material | Shopfronts/ External Signage | Vehicles | Websites |
|---|---|---|---|---|---|---|
| 3+ years ago | 5 | | 6 | | | 24 |
| 2 years ago | 20 | 28 | 7 | | 24 | |
| 1 year ago | 27 | | 17 | 89 | | 7 |
| | | 40 | 70 | | 76 | 1 |
| 0-12 months ago | 48 | 23 | | | | 70 |
| | | 9 | | 11 | | |

| Average no. of months | 12.66 | 24.62 | 9.75 | 38.32 | 7.40 | 12.45 |
|---|---|---|---|---|---|---|

Q.3a When did your organisation last order a print run for the following?

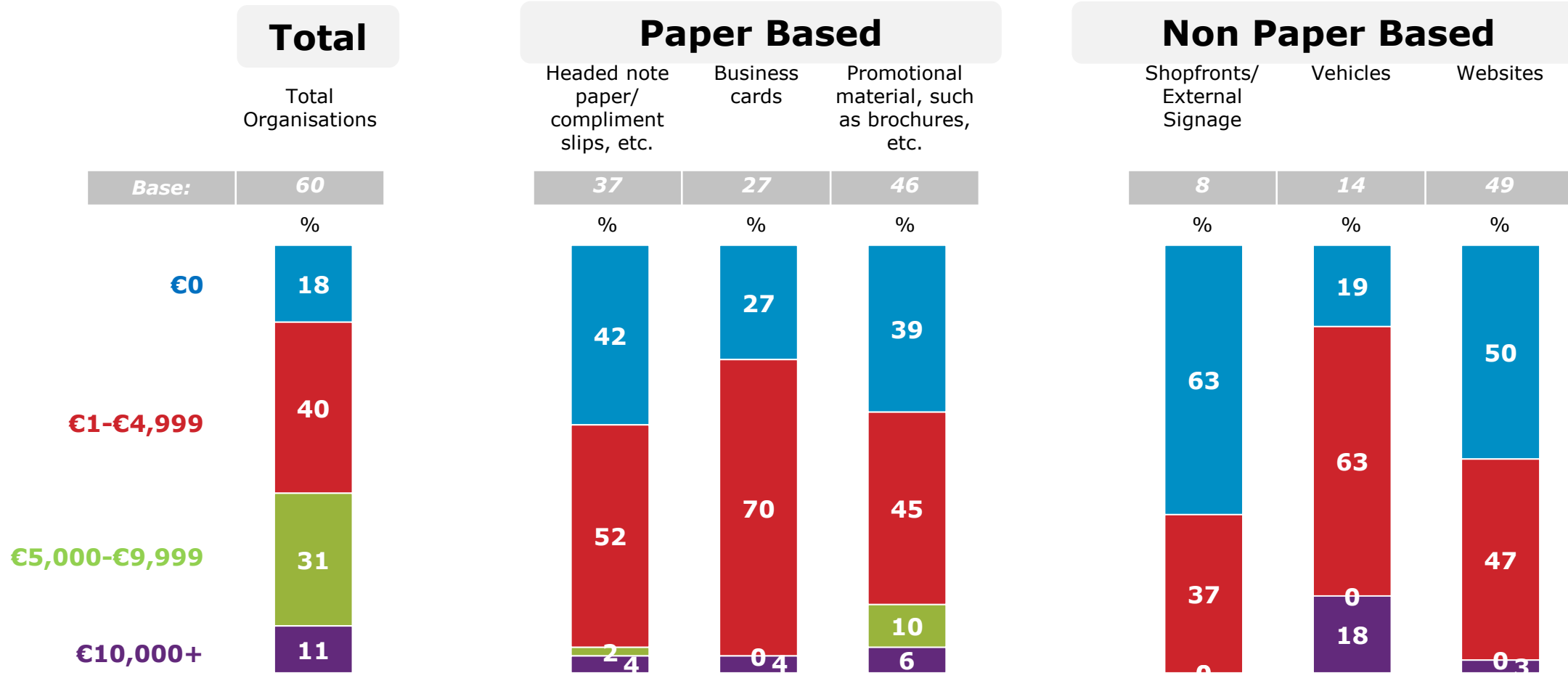Q.4a When did your organisation last make changes to/update the following?

Websites, vehicles and promotional material are the items which have been updated most recently.

*Data includes current and not current but previous users of NGNs

*Caution small base

# Cost to update materials over the next 0-6 months

**Base: All NGN organisations (60)**

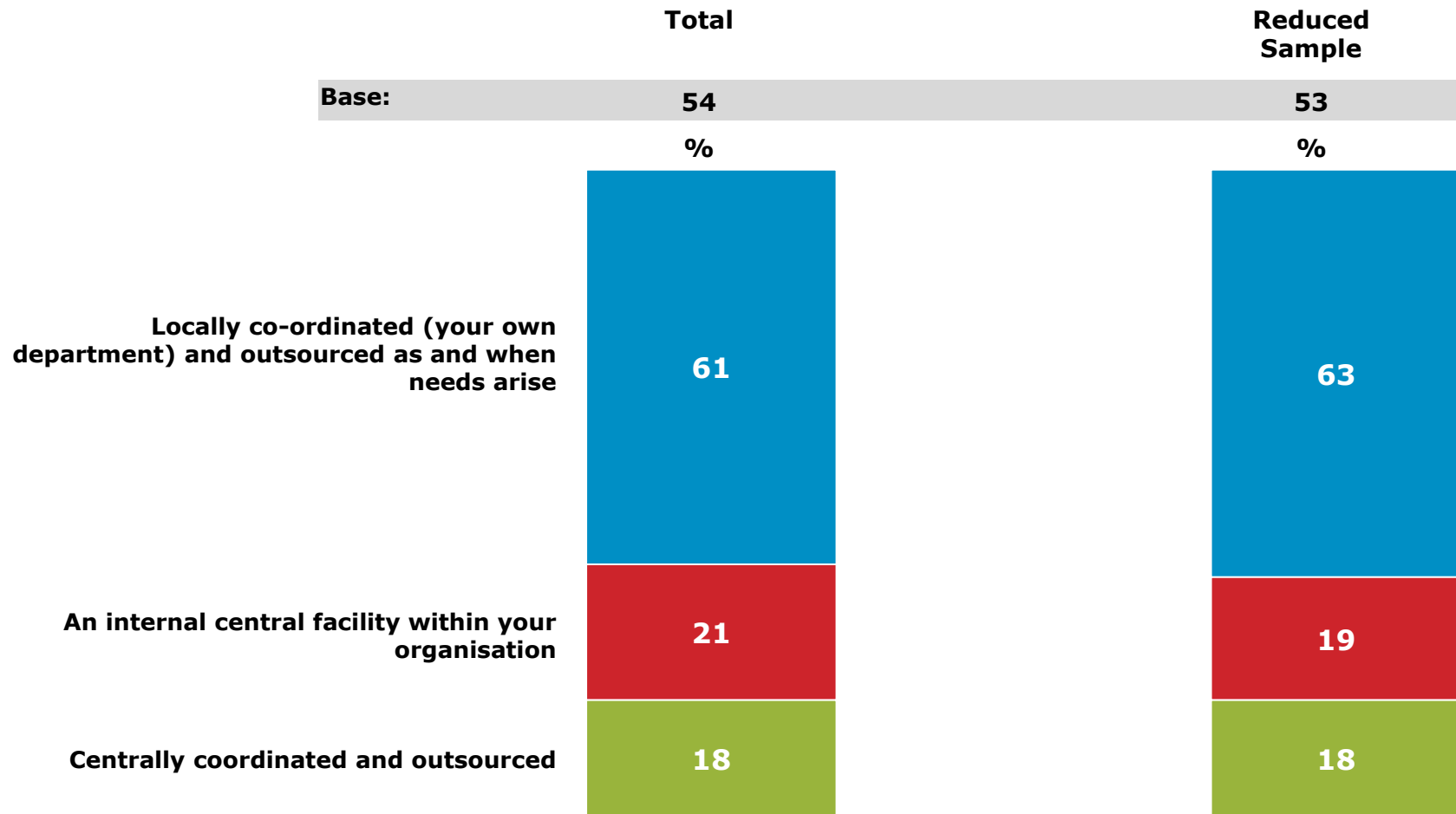| | **Total** | **Paper Based** | | | **Non Paper Based** | | |
|---|---|---|---|---|---|---|---|
| | Total Organisations | Headed note paper/ compliment slips, etc. | Business cards | Promotional material, such as brochures, etc. | Shopfronts/ External Signage | Vehicles | Websites |
| **Base:** | 60 | 37 | 27 | 46 | 8 | 14 | 49 |
| | % | % | % | % | % | % | % |
| **€0** | 18 | 42 | 27 | 39 | 63 | 19 | 50 |
| **€1-€4,999** | 40 | 52 | 70 | 45 | 37 | 63 | 47 |
| **€5,000-€9,999** | 31 | 2 | 0 | 10 | 0 | 0 | 0 |
| **€10,000+** | 11 | 4 | 4 | 6 | 0 | 18 | 3 |

> **18% of all NGN organisations envisage no cost over the next 6 months**
> **57% of all NGN organisations envisage costs below €5K.**
> **89% of all NGN organisations envisage costs below €10K.**

*Percentages in the bars are rounded.*
*Please note: Total column accumulates the individual amounts an organisation will spend across materials, for example, headed note paper and promotional material costs combined. Hence, at a total level the organisation is spending more than the values noted within each individual material type.*

Q.3b Can you give an approximate cost of conducting print runs for the following materials over the next 0 – 6 months?
Q4b. Can you give an approximate cost in terms of material changes, if any below, (including implementation/staff costs) for making changes over the next 0 – 6 months to/updating each item if your organisation was to change its non-geographic number only?

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# Design, printing and signage responsibility

**Base: All NGN organisations who display their NGN on materials: 54**

|  | Total | Reduced Sample |
|---|---|---|
| **Base:** | **54** | **53** |
|  | **%** | **%** |
| **Locally co-ordinated (your own department) and outsourced as and when needs arise** | 61 | 63 |
| **An internal central facility within your organisation** | 21 | 19 |
| **Centrally coordinated and outsourced** | 18 | 18 |

> The majority of organisations (3 in 5) locally co-ordinate design, printing and signage and then outsource when the need arises. 1 in 5 organisations have an internal facility for this process, while 1 in 5 centrally coordinate within their organisation.
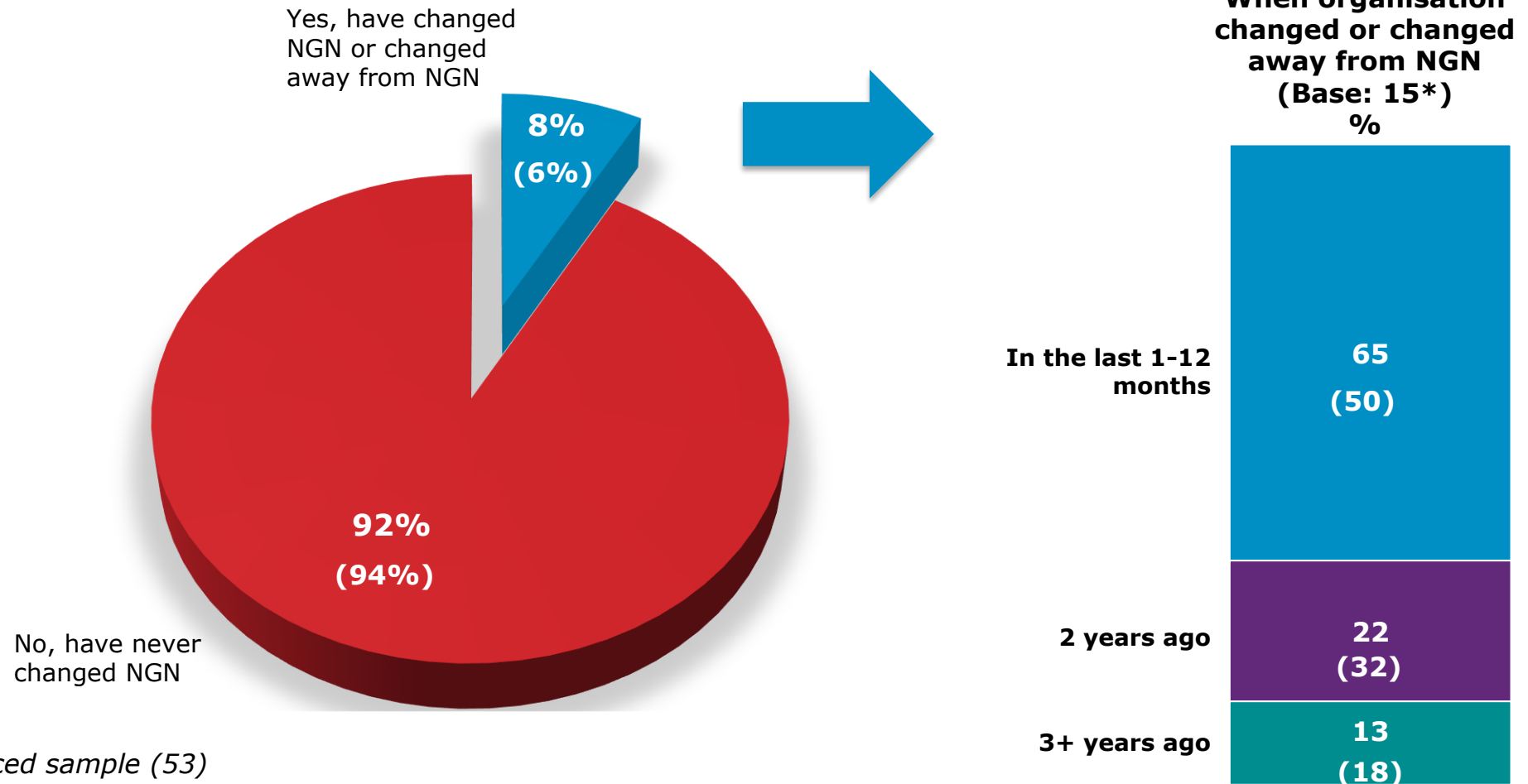
*\*Data includes current and not current but previous users of NGNs*

Q.2a Can you tell me whether design, printing and signage is covered by:

# Incidence of organisations ever changing NGN or changed away from an NGN

**Base: All NGN organisations who display NGN on materials (54)**

Yes, have changed NGN or changed away from NGN

**8%**
**(6%)**

**92%**
**(94%)**

No, have never changed NGN

*( ) = reduced sample (53)*

**When organisation changed or changed away from NGN (Base: 15*) %**

**In the last 1-12 months** — **65 (50)**

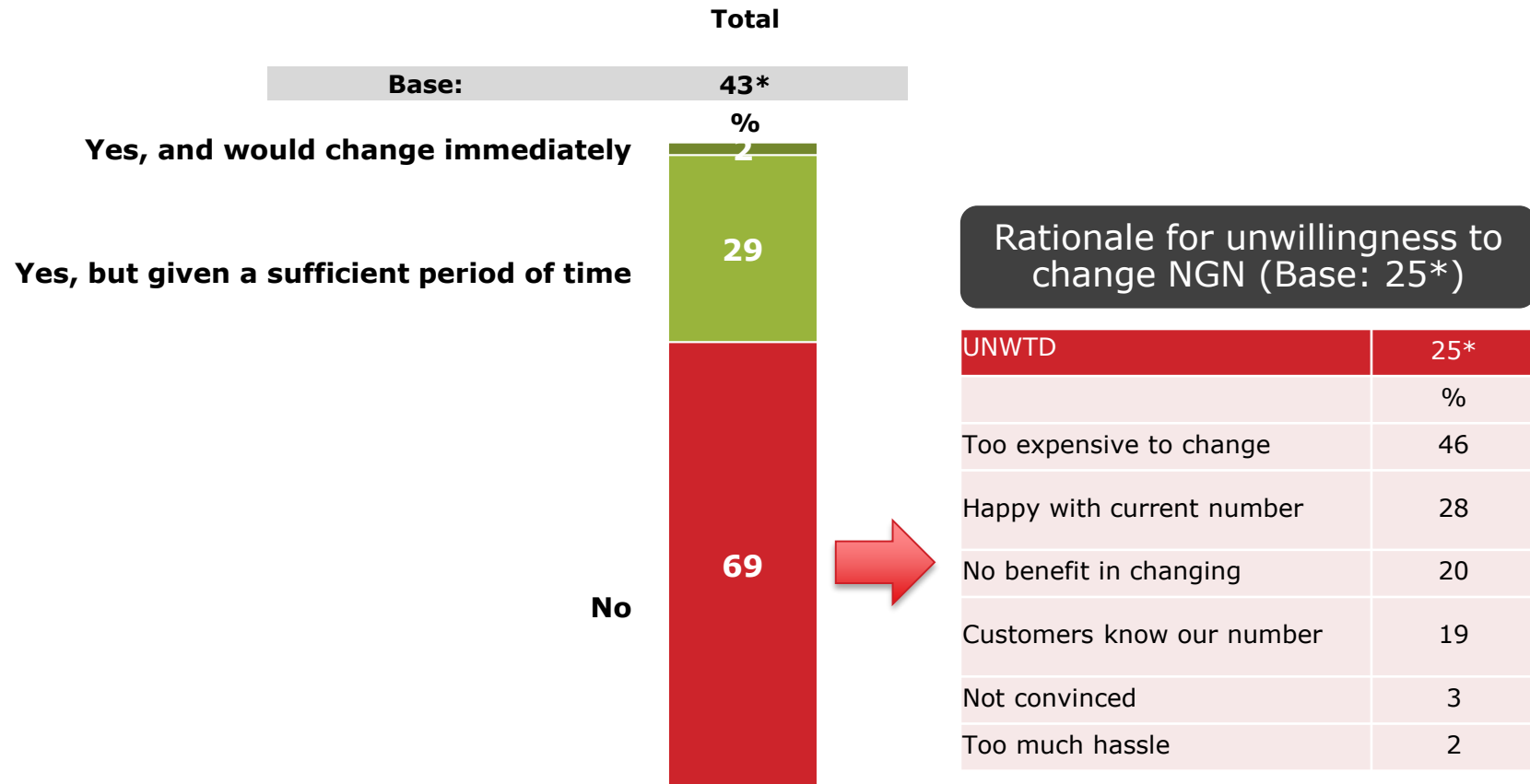**2 years ago** — **22 (32)**

**3+ years ago** — **13 (18)**

Less than 1 in 10 organisations have previously changed or changed away from an NGN to deliver services. 2 in 3 of these changed within the last 12 months.

*\*Caution small base*

B&A

Q.5 Has your organisation ever changed the Non-Geographic Number or changed away from a Non-Geographic Number you use to deliver services?
Q.5a When did you change or change away from a non-geographic number?

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# Willingness of organisations to make changes/update its non-geographic number

**Base: All NGN organisations currently using NGN excluding 1800 (43*)**

Total

| Base: | 43* |
|---|---|
| | % |

**Yes, and would change immediately** 2

**Yes, but given a sufficient period of time** 29

**No** 69

### Rationale for unwillingness to change NGN (Base: 25*)

| UNWTD | 25* |
|---|---|
| | % |
| Too expensive to change | 46 |
| Happy with current number | 28 |
| No benefit in changing | 20 |
| Customers know our number | 19 |
| Not convinced | 3 |
| Too much hassle | 2 |

> 3 in 10 NGN using organisations would make changes to/update their NGN in order to improve consumer awareness and understanding and improve usage of NGNs. Among those who are unwilling to change their NGN the main reason given was due to potential cost implications.

*Caution small base

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? Q.7 Would your organisation be willing to make changes/update its non-geographic number in order to improve consumer awareness and understanding, and improve usage of non-geographic numbers?

# B&A

# THANK YOU