



Non-Geographic Numbers: Organisation Study

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What are NGNs?

- ❖ A Non-Geographic Number (NGN) is a type of telephone number that is not linked to a particular geographic location identifiable from the number – i.e. a NGN does not identify the call termination point. By contrast, a Geographic Number is linked to a particular geographic region that is identifiable from the area code (e.g. '01' for Dublin, '061' for Limerick).
- ❖ NGNs provide a platform for the delivery of a wide variety of services. For example, private companies, public sector bodies and charities use NGNs to provide access to services such as teleconference services, help lines, customer support, product help desks and information services.
- ❖ This survey covers five types of NGN in Ireland:
 - **'1800 XXX XXX'**, Freephone – the total charge for these calls is borne by the called party.
 - **'1850 XXX XXX'**, Shared Cost (per call charge) – the caller is charged for only part of the cost of the call, with the called party being charged for the remainder.
 - **'1890 XXX XXX'**, Shared Cost (per minute charge) – the caller is charged for only part of the cost of the call, with the called party being charged for the remainder.
 - **'0818 XXX XXX'**, Universal Access – the caller is charged a per minute rate for the cost of the call.
 - **'076 XXX XXXX'**, Nomadic – the caller is charged a per minute rate for the cost of the call.

NGN retail call costs

NGN	Retail Tariff
1800	There is no charge to the caller.
1850	<p>The retail tariff can typically range from 4c/Call from a fixed line to 30c/Call from a mobile.</p> <p>The per call retail tariff is set to the originating undertaking's standard rate for a 5 minute call to a Geographic Number. This rate varies between operators.</p>
1890	<p>The retail tariff can typically range from 5c/min from a fixed line to 35c/min from a mobile.</p> <p>The per minute retail tariff is set to the originating undertaking's standard rate for a call of the same duration to a Geographic Number. This rate varies between operators.</p>
0818	<p>The retail tariff can typically range from 4c/min from a fixed line to 45c/min from a mobile.</p> <p>The per minute retail tariff is set to the originating undertaking's standard rate for a call of the same duration to a Geographic Number. This rate varies between operators.</p>
076	<p>The retail tariff can typically range from 4c/min from a fixed line to 45c/min from a mobile.</p> <p>The per minute retail tariff is set to the originating undertaking's standard rate for a call of the same duration to a Geographic Number. This rate varies between operators.</p>

Typical tariffs observed across a number of fixed and mobile operator websites.

Key summary



Awareness of NGNs, Usage of telephone numbers

- ❖ 99% of organisations surveyed were aware of a NGN. 96% knew of '1800' and '1850', 88% knew of '1890', 54% knew of '0818', and 28% knew of '076'.
- ❖ Most organisations surveyed provide telephone services. 87% use landline numbers, 67% use mobile numbers, and 10% use NGNs. Use of NGNs was higher for organisations with more than 40 employees and for organisations based in Dublin.
- ❖ 3% of organisations surveyed had previously used a NGN to provide services but had ceased doing so. Reasons for this included switching to a landline or mobile number or to a different NGN while in some cases using a NGN was not considered cost effective.
- ❖ Of those surveyed organisations which use NGNs: 30% use '1800' as their main NGN; 20% use '1850'; 33% use '1890'; 12% use '0818'; and 5% use '076'.

Reasons for organisations using/not using NGNs

- ❖ Of those surveyed organisations that use '1800' NGNs, 61% stated that they do so to allow their customers to access services free of charge. Of those organisations that use NGNs other than '1800': 62% seek to reduce the cost of calls for customers; 59% seek to provide memorable contact numbers for customers; and 59% seek to offer a single contact number to customers.
- ❖ The least favoured type of NGNs were '076' (23% would not consider using them) and '0818' (20% would not consider using them). The main reason for not using these ranges was lack of familiarity.
- ❖ Surveyed organisations that do not use NGNs gave the following reasons:
 - 82% - NGNs are not necessary for the organisation
 - 75% - use landline / mobile numbers instead
 - 70% - the organisation is not big enough or does not have high enough turnover
 - 49% - to offer a local presence
 - 30% - NGNs are too expensive for the organisation to use
 - 28% - NGNs are too expensive for customers to call
 - 49% - landline / mobile numbers are as easy to remember as NGNs
 - 47% - landline / mobile numbers are more cost effective for the organisation than NGNs
 - 49% - landline / mobile numbers are more cost effective for consumers than NGNs

Alternative contact methods

- ❖ Of the surveyed organisations that use NGNs:
 - 76% also provide an alternative landline number
 - 33% also provide an alternative mobile number
 - 18% do not provide an alternative landline / mobile number

- ❖ Of those organisations that use a NGN and also provide a landline / mobile number:
 - 34% wish to give customers an alternative option
 - 21% were aware that customers may have free calls to landline / mobile numbers

- ❖ Of those surveyed organisations that provide a NGN and an alternative number, landline numbers were the main preferred alternative (44%), followed by email (14%) or a different NGN (13%).

Understanding Call Packages

- ❖ Of those surveyed organisations that use NGNs:
 - For landline callers, more than one third did not think that NGN calls were included in landline callers' packages of free telephone minutes.
 - For mobile callers, more than one quarter (and more than half of '1890' users) did not think that NGN calls were included in mobile callers' packages of free telephone minutes.
- ❖ For landline callers, organisations using '1800', '1890' and '076' NGNs were more likely to think that NGN calls were included in landline callers' packages of free telephone minutes.
- ❖ For mobile callers, organisations using '1800' and '076' NGNs were more likely to think that NGN calls were included in mobile callers' packages of free telephone minutes.
- ❖ Many organisations which use NGNs but did not think (or did not know) NGN calls were included as free minutes/calls in landline callers' call packages, would consider switching to a landline or mobile number that is included as free minutes/calls in callers' call packages. About 3 in 5 organisations using '1890' NGNs and 7 in 10 of those using '1850' NGNs would consider switching.
- ❖ Many organisations which use NGNs but did not think (or did not know) NGN calls were included as free minutes/calls in mobile callers' call packages, would consider switching to a landline or mobile number that is included as free minutes/calls in callers' call packages. More than 3 in 5 organisations using '1850' and '1890' NGNs would consider switching.

Awareness of NGN calling costs

- ❖ Of those surveyed organisations that were aware of NGNs:
 - 27% correctly associated '1800' as free to call from a mobile
 - 47% correctly associated '1800' as free to call from a landline
 - 33% correctly associated '1850' with calls charged per call
 - 31% correctly associated '1890' with calls charged per minute
 - 21% correctly associated '0818' with calls charged per minute
 - 20% correctly associated '076' with calls charged per minute
- ❖ The majority of organisations that were aware of NGNs were unable to state the typical retail charge to a landline or mobile caller for calling a NGN, a landline number, or a mobile number. However, organisations typically claimed higher knowledge of the retail charges of NGN calls made from landlines than from billpay and prepay mobiles.
- ❖ Of those surveyed organisations which claimed to know the typical retail charges for NGN calls:
 - 63% correctly stated that '1800' NGNs are free to call from landlines
 - 44% correctly stated that '1800' NGNs are free to call from prepay mobiles
 - 54% correctly stated that '1800' NGNs are free to call from billpay mobiles

Awareness of NGN calling costs

- ❖ Of those surveyed organisations that use NGNs:
 - Almost half (48%) considered that NGN costs to their organisation was an important factor in choosing a NGN provider.
 - Over half (53%) considered that the retail charges to customers for calling NGNs influenced their choice of NGN.
 - Over half (51%) considered that customers, in deciding whether to call a NGN, factored in the cost of the call.
 - 3 in 5 (63%) thought that it is important that customers be aware of the cost of calling NGNs.
- ❖ The majority (77%) of surveyed organisations that use NGNs did not provide any guidance to customers on the cost of calling their NGNs - this was higher among organisations using '1850' NGNs. Just 1 in 5 organisations claimed to provide guidance, mainly through advertising, website, email or social media.
- ❖ Of those surveyed organisations that use NGNs:
 - 3 in 4 thought it is not difficult to inform customers of exact cost of calling their NGN.
 - 1 in 5 thought it is difficult to inform customers of the exact cost of calling their NGNs - this seemed more of an issue for organisations using '1890' and '076' NGNs.

Awareness of organisational NGN costs, Potential use of NGNs

- ❖ Of those surveyed organisations that use NGNs, the majority of users did not know their monthly costs for receiving NGN calls:
 - 66% could not estimate the organisation's monthly cost for receiving NGN calls from landlines
 - 68% could not estimate the organisation's monthly cost for receiving NGN calls from mobiles
 - 58% could not estimate the organisation's monthly cost for receiving NGN calls from landlines and mobiles
- ❖ Of those surveyed organisations that do not use NGNs:
 - 40% who thought NGNs are too expensive for their customers to call would consider using NGNs in future if the retail charges for NGN calls were reduced.
 - 44% who think that NGNs are too expensive for the organisation to use would consider using NGNs in future if the organisation's costs of using NGNs were reduced.

Introduction



Research Methodology - Sample

- Fieldwork for this study was conducted from May 2016 - July 2016.
- Survey data collection was administered via telephone from B&A's call centre in Milltown Dublin.
- 881 respondents were interviewed in total. All interviews were conducted with the person responsible for making decisions regarding the telephone numbers their organisation provides to its customers to call.
- Interviewing was conducted in two parts:
 - ❖ Part 1: **Nationally representative sample of 790 organisations**, with enhanced representation of larger organisations i.e. a higher proportion of interviews were conducted with larger organisations as they were more likely to use NGNs. The sample was then weighted to be reflective of all Irish organisations by organisation size and region. This sample includes interviews with 127 organisations who currently use non-geographic numbers (NGNs).
 - ❖ Part 2: **Booster sample of 91 organisations** who currently use NGNs. This sample was merged with the nationally representative sample and weighted to match nationally representative proportions. Therefore, the total number of interviewed organisations who currently use NGNs is 218.
 - ❖ The weighted sample composition was modelled upon universe estimates derived from a combination of leading organisation directory sources: The Irish Times, Business & Finance Top 500 companies in Ireland, Bill Moss and Data Ireland, as well as industry representative groups and CSO estimates.

Research Methodology – Margin of Error

- The margin of error on the total sample of 881 is +/-3.4% pts. The margin of error on the sample of 218 NGN organisations is +/-7.1% pts.
- Significance testing to 95% confidence level has been applied to the data and is highlighted throughout this presentation. (Green highlighting = significantly **higher result** versus the total sample, red highlighting = significantly **lower result** than the total sample).
 - ❖ Commentary detailing 'higher' or 'lower' identifies findings that are significantly higher or lower versus the total sample.

Sample Detail – weighting applied

- Interviews achieved and corrective weighting applied.

	No. of Interviews	Weighting applied
Total	881	100%
Employees		
Under 10 employees	501	88%
11 – 40 employees	235	5%
41-99 employees	61	3%
100+ employees	84	3%
Region		
Dublin	281	31%
Rest of Leinster	200	23%
Munster	287	28%
Conn/Ulster	113	19%

A note on reading the charts

- Base sizes on each chart refer to the unweighted base i.e. the raw number of interviews as significance testing is based on 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, this includes both the main sample and sub-samples.
- 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%.

Profile of Sample

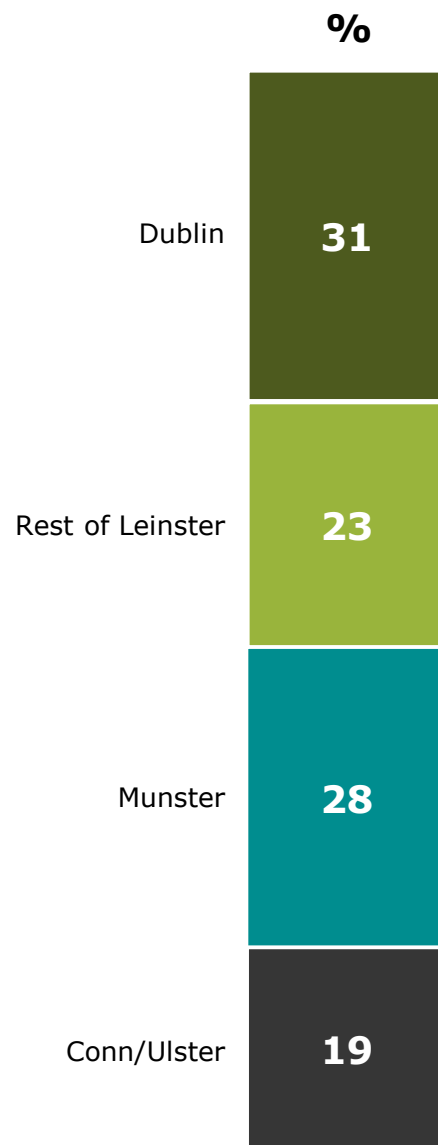
Industry Sector



No. of employees



Region



**All other 2% or less.



Analysis of Sample

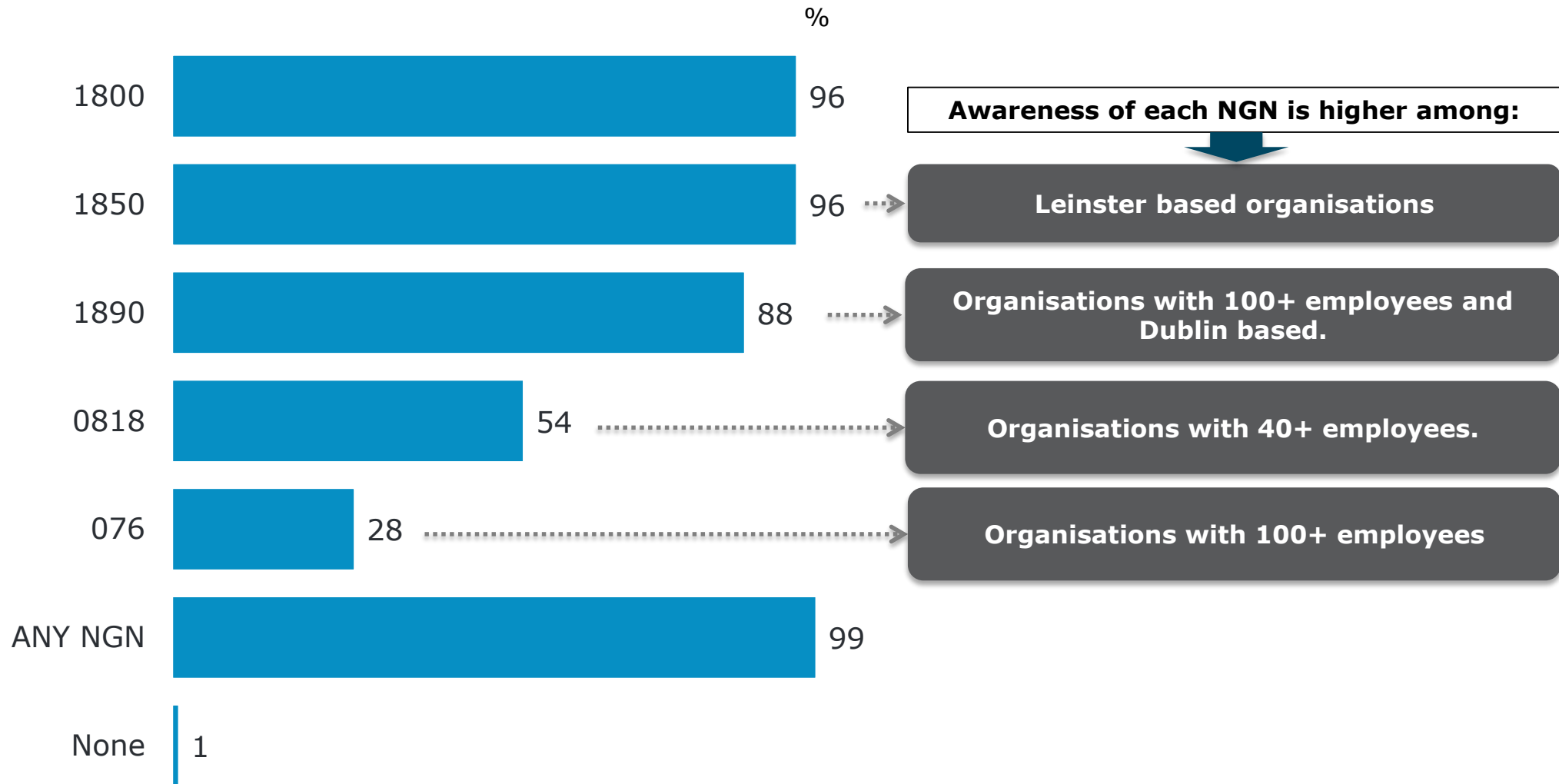
Note: The sample has been weighted on number of employees and region

Awareness & Usage of NGNs



Awareness of NGNs

Base: All organisations (881)



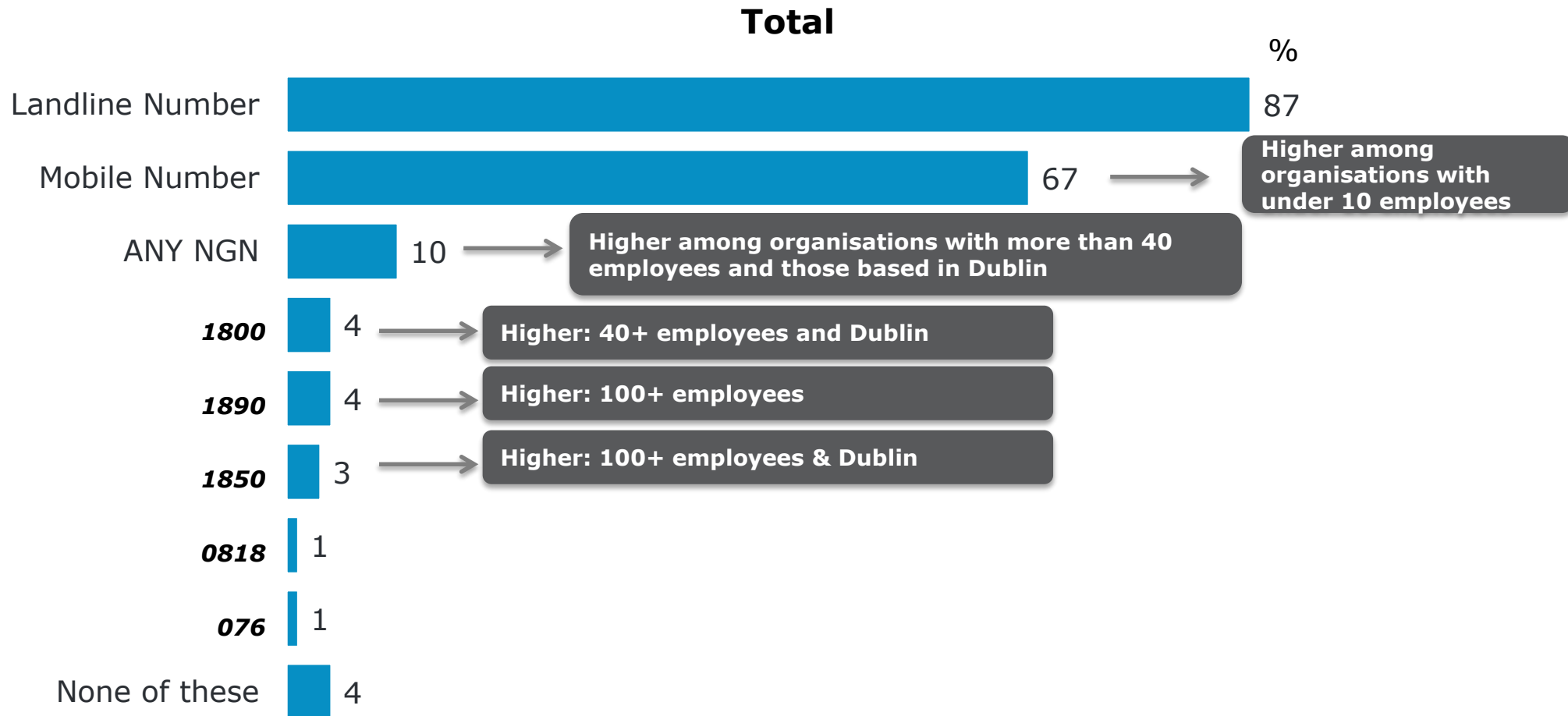
High awareness of NGNs. 99% of organisations aware of at least one NGN. Awareness is highest for the 1800 and 1850 NGNs (96% each) and lowest for 076 (28%). Leinster-based organisations claimed highest awareness of 1850 NGNs, while organisations with 100+ employees claimed highest awareness of 1890 and 076 NGNs.

** Multiple responses allowed.

*** See appendix chart for data breakdown.

Current usage of NGNs, landlines and mobile numbers to provide services

Base: All organisations (881)



High usage of landline and mobile numbers to provide services.
 NGN usage is higher among organisations with 40+ employees and those based in Dublin.
 Higher usage of 1800 NGNs among organisations with 40+ employees and those based in Dublin.
 Higher usage of 1890 and 1850 NGNs among organisations with 100+ employees.

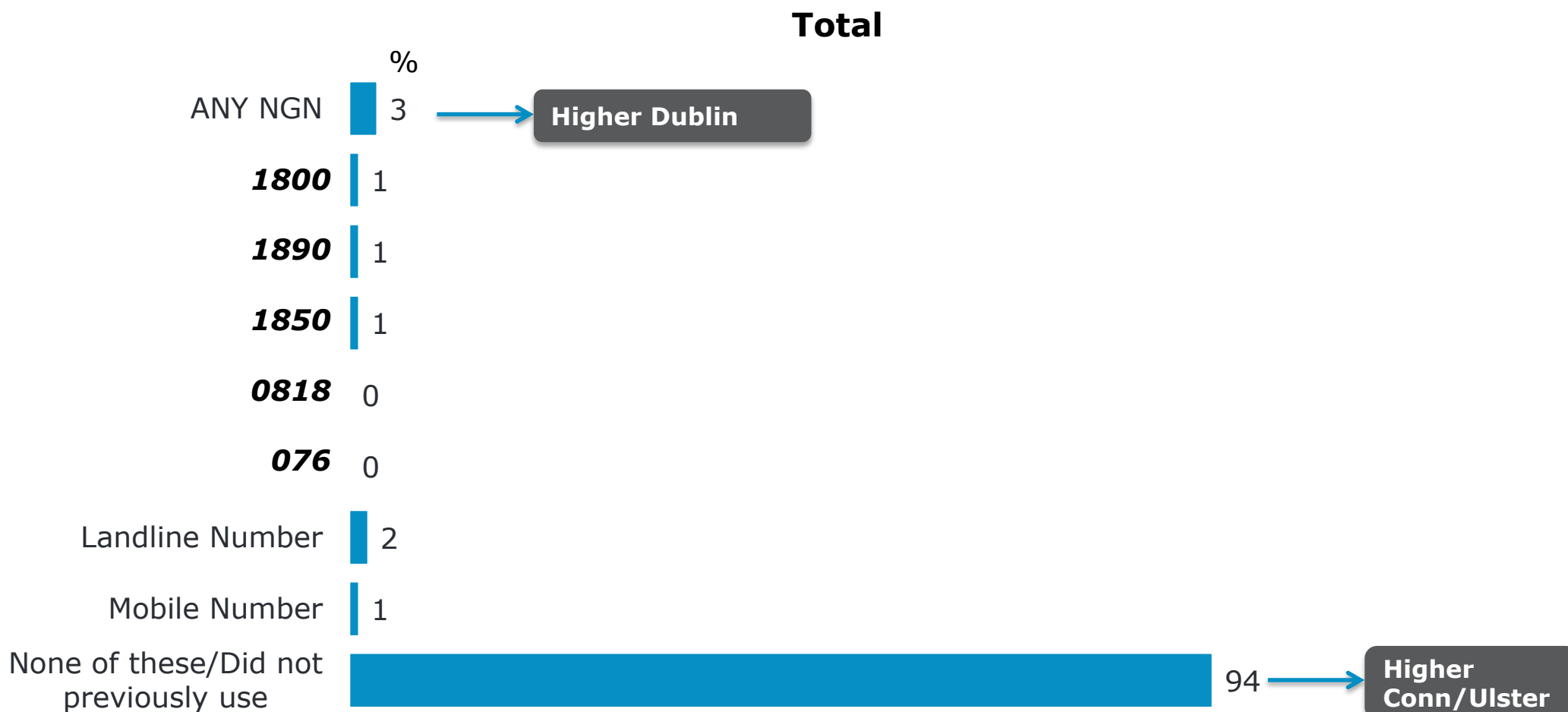
** Multiple responses allowed.

*** See appendix chart for data breakdown.



Previous use of NGNs

Base: All organisations (881)



Previous usage of NGNs was higher among Dublin based organisations, while those claiming that they did not previously use a NGN was higher among organisations based in Conn/Ulster.

** Multiple responses allowed.

*** See appendix chart for data breakdown.



Reasons for no longer using a previously used NGN

Base: All previously used NGNs (35*)

	NGN Previously used				
	1800	1850	1890	0818	076
Base: No. of organisations who previously used each NGN	11*	7*	9*	5*	3*
	%	%	%	%	%
Decided to use a landline number instead	4	56	80	-	8
Not cost effective for the organisation	18	20	53	-	8
I no longer provide this service	4	26	43	24	-
Decided to use a different Non-Geographic Number	38	18	-	24	-
Decided to use a mobile number instead	-	-	18	28	-
Decided to use an online service instead	4	18	28	5	-
Customers weren't using it	-	-	-	40	-
Too expensive for customers	5	49	-	-	-
Use it more than any other number	-	-	-	-	46
On-site connectivity not suitable	-	-	-	-	46
Change of ownership / obliged to provide 1890	18	-	-	-	-
Others*	4	24	14	-	-

Nine organisations decided to use a landline number instead. Reasons included: landline number is similarly suited to the service provided, organisational costs are less than those of an NGN, campaign is no longer running and number of calls didn't justify the use of NGN.

Nine organisations decided to use a different NGN instead. Reasons included: Organisation costs are lower using new NGN, new NGN is easier to remember. Note some organisations previously used more than one NGN.

Two organisations decided to use a mobile number instead. Reasons included: mobile number suits the service provided and is easy to remember

* Caution small base size.
** Multiple responses allowed.

- Q17 You said that your organisation previously used (insert NGN from Question 2a). Why does your organisation no longer use this number?
- Q18 You said that you use a landline number instead of an NGN now. For what reason(s) do you do so?
- Q18a You said that you use a mobile number instead of an NGN now. For what reason(s) do you do so?
- Q19 You said that you use a different NGN now. For what reason(s) do you do so?



Services provided by previously used NGN

Base: All previously used NGNs (21*)

	NGN Previously used				
	1800	1850	1890	0818	076
Base: No. of organisations who previously used each NGN	11*	6*	2*	0*	2*
	%	%	%	%	%
Sales	8	27	-	-	-
Customer Services/queries	30	31	-	-	-
General contact number/everything	-	4	-	-	-
Helpline	45	27	86	-	19
Ad tracking	-	-	14	-	-
Loan application number	2	5	-	-	-
Market research	18	4	-	-	-
Bank	-	-	-	-	81
Driving lessons	-	32	-	-	-

Main services provided over previously used NGN:



* Caution small base size
 ** Multiple responses allowed



Why organisations no longer use specific NGN

Base: All who previously used NGNs (21*)

	NGN Previously used				
	1800	1850	1890	0818	076
Base: No. of organisations who previously used each NGN	11*	6*	2*	0*	2*
	%	%	%	%	%
Too expensive for customers	-	59	-	-	-
Not cost effective for the organisation	8	64	86	-	81
Customers weren't using it	-	-	-	-	-
Provided no significant benefit to the organisation	-	-	14	-	-
This class of NGN has was not aligned with the image/brand of my organisation	-	27	-	-	-
Decided to use a landline number instead	28	91	-	-	-
Decided to use a mobile number instead	2	37	-	-	-
My organisation no longer provides this service	70	41	-	-	19
Use website	4	-	-	-	-

4 organisations decided to use a landline number instead, the reasons given were:

- Customers prefer this number, associate name and number, number is suited to the service we provide.

2 organisations decided to use a mobile number instead, the reasons given were:

- This number is similarly suited to the service we provide for our customers.

* Caution small base size.

** Multiple responses allowed.



Q21 You said that your organisation previously used (insert NGN as appropriate from Question2a) number. Why does your organisation no longer use this number?

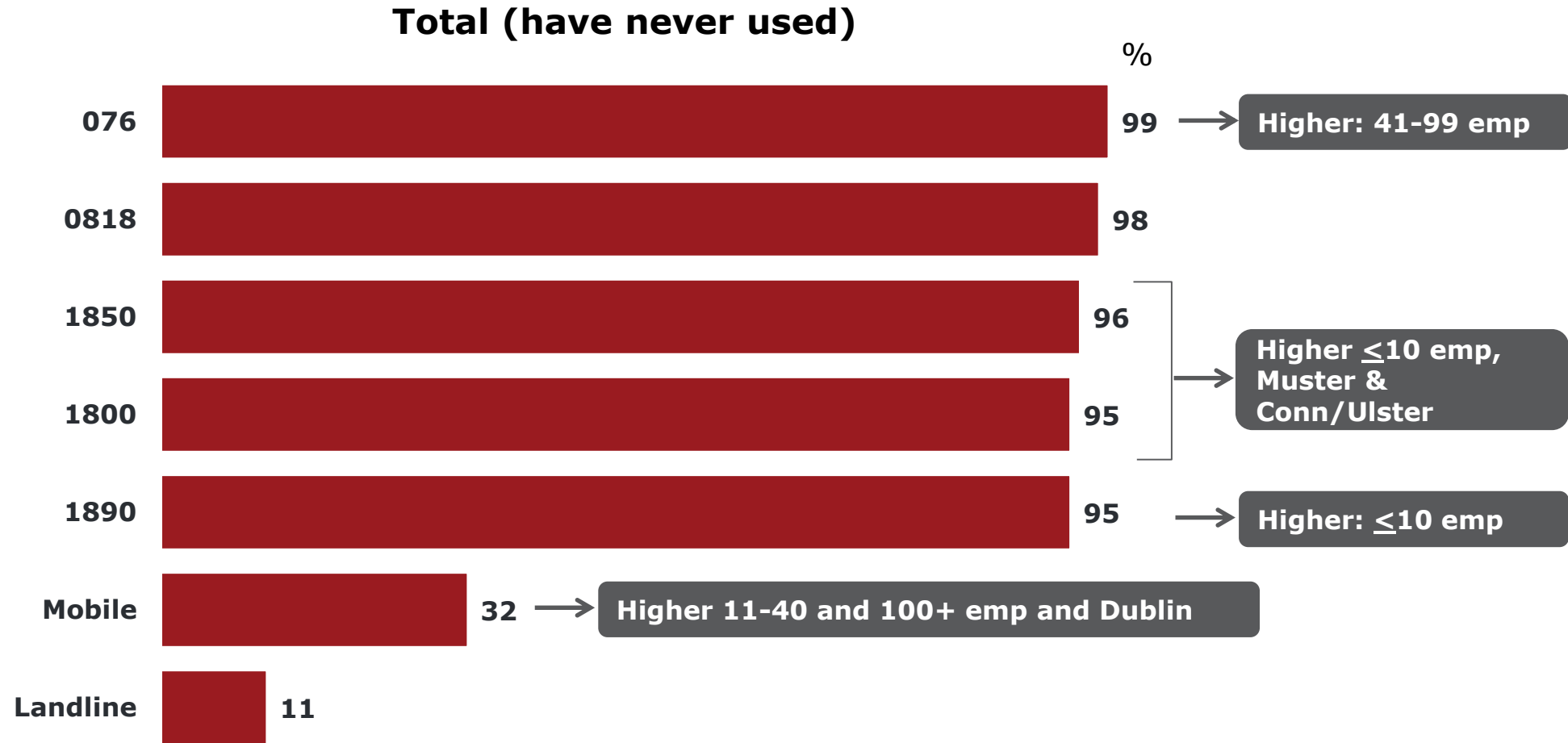
Q22 You said that you use a landline number instead of an NGN now. For what reason(s) do you do so?

Q22a You said that you use a mobile number instead of an NGN now. For what reason(s) do you do so?



Incidence of organisations who have never used each type of phone number

Base: All organisations (881)



Non-usage of 1850, 1800 and 1890 numbers is higher among smaller organisations i.e. those with less than 10 employees. Non-usage of mobile numbers is higher among the mid and larger organisations (i.e. 11-40 employees and 100+ employees) and also those in Dublin.

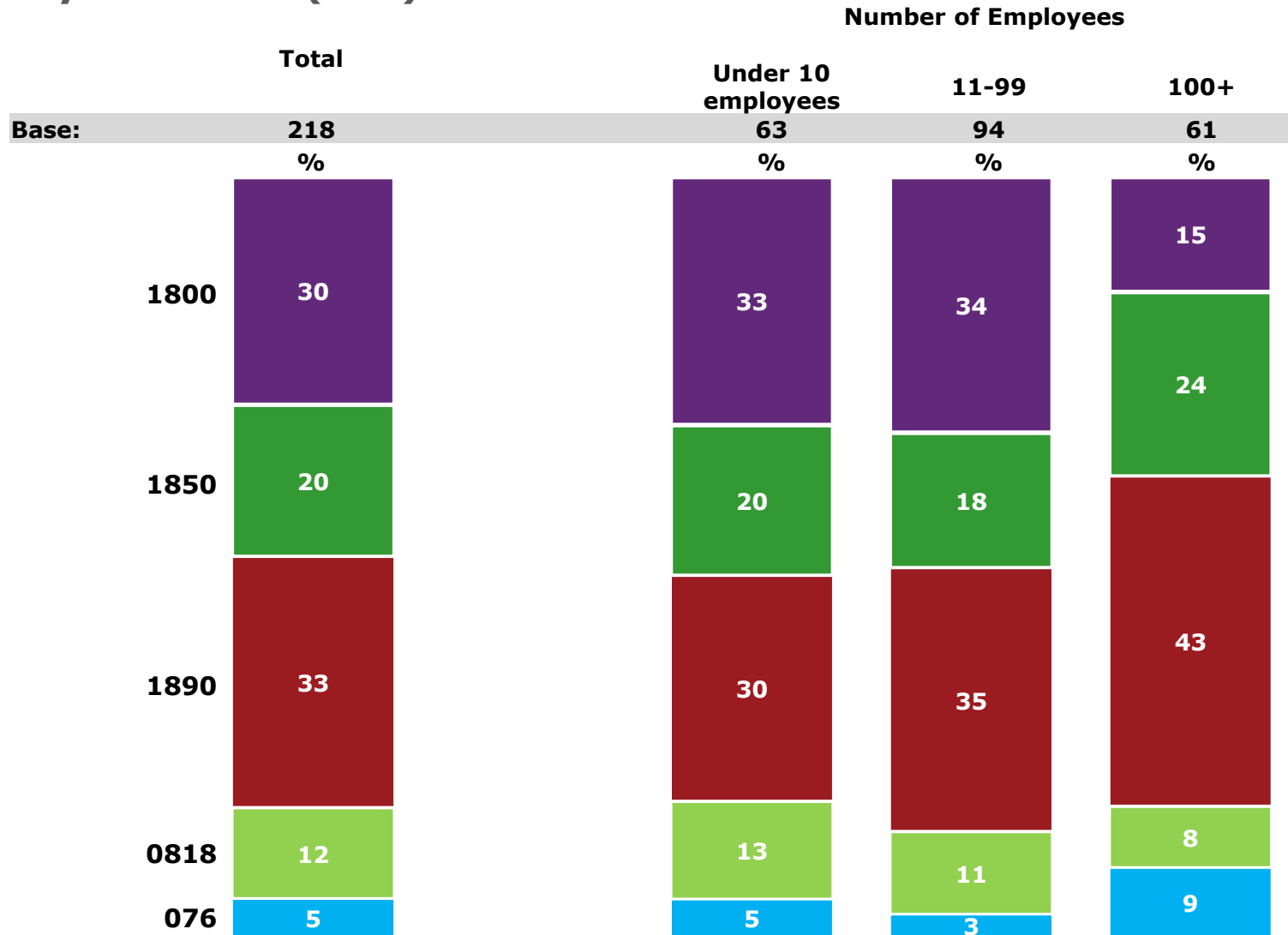
** Multiple responses allowed.

*** See appendix chart for data breakdown.



Main NGN used

Base: All currently use NGNs (218)



A third of organisations use 1890 as their main NGN, while 3 in 10 use 1800. A third of NGN using organisations with less than 100 employees (<10 & 11-99 emps) claim to use 1800, while a similar number use 1890. Organisations with more than 100 employees mainly use 1890.

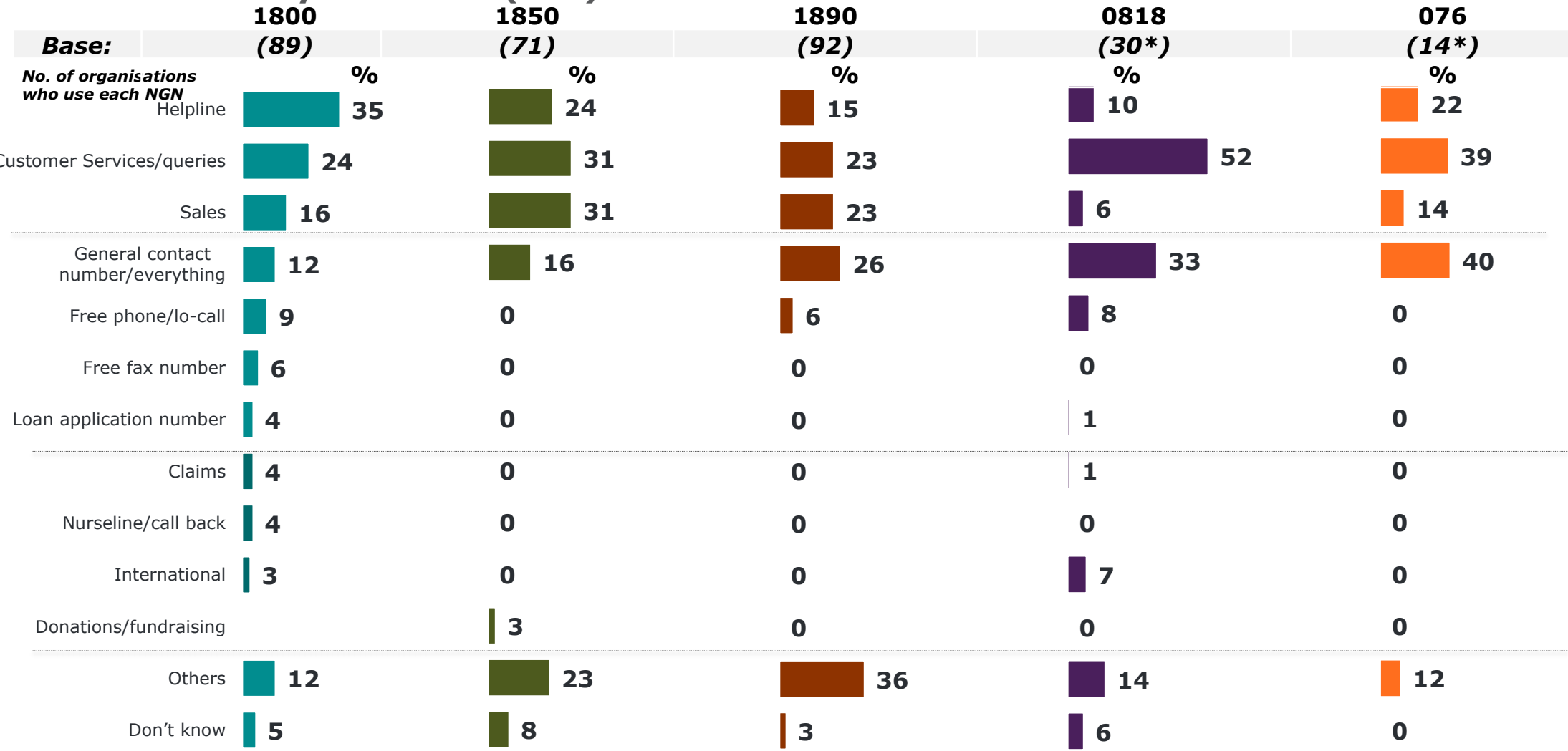
***See appendix chart for data breakdown.



Q.6a Which type of Non-Geographic Number would you consider to be your main NGN? Your main NGN means the Non-Geographic-Number that is called the most.

Services provided through each NGN number

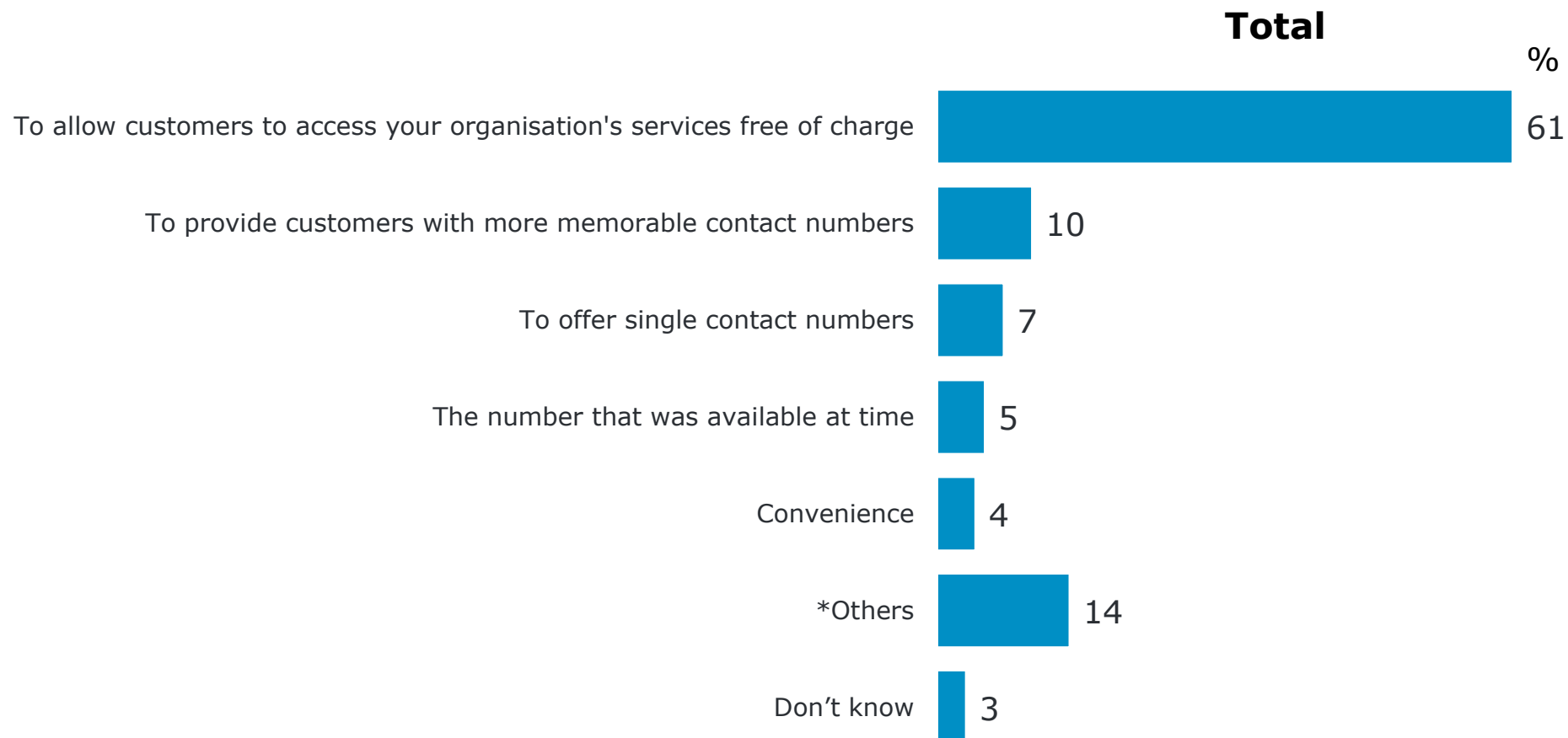
Base: All currently use NGNs (218)



* Caution small base size.
 ≠ All others 2% or less.
 ** Multiple responses allowed.

Main reasons for providing a 1800 number for certain services instead of using other NGNs

Base: All organisations currently using 1800 (89)



The main reason for using 1800 numbers is to allow customers to access the organisation's services free of charge.

* All others 3% or less.

Main reasons for using a NGN other than 1800

Base: All organisations where main NGN is not an 1800 number (154)



The main reasons for using a NGN other than 1800 include to reduce the cost of calls to customers, to provide memorable contact numbers and to offer a single contact numbers to customers.

** Multiple responses allowed.

*** See appendix for data breakdown.

NGNs that organisations would not consider using

Base: All currently use NGNs (218)



Approximately 35% of current NGN users would be deterred from using at least one NGN. 076 NGNs are considered least favourable (especially among organisations with fewer than 10 employees), followed by 0818 NGNs.

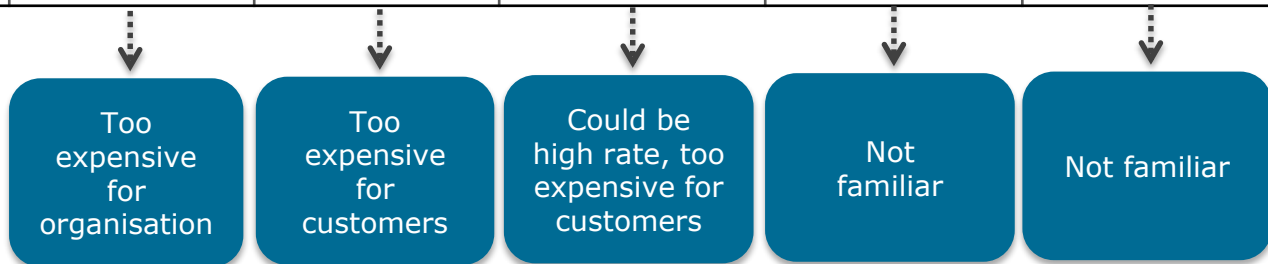
** Multiple responses allowed.

Main reasons for not wishing to use specific NGN numbers

Base: Current NGN users who would not consider using specific NGN

	Main				
	1800	1850	1890	0818	076
Base:	17*	14*	17*	31*	36*
	%	%	%	%	%
Too expensive for my organisation	73	31	23	19	5
Could be high rate	20	26	38	6	11
Not Familiar / Never heard of	18	16	10	40	56
No need for it	12	-	16	6	9
Don't like it	12	-	10	9	16
Too expensive for customers to call	7	37	36	7	4
Others	2***	18	10	24	26
Don't know	2	-	2	1	4

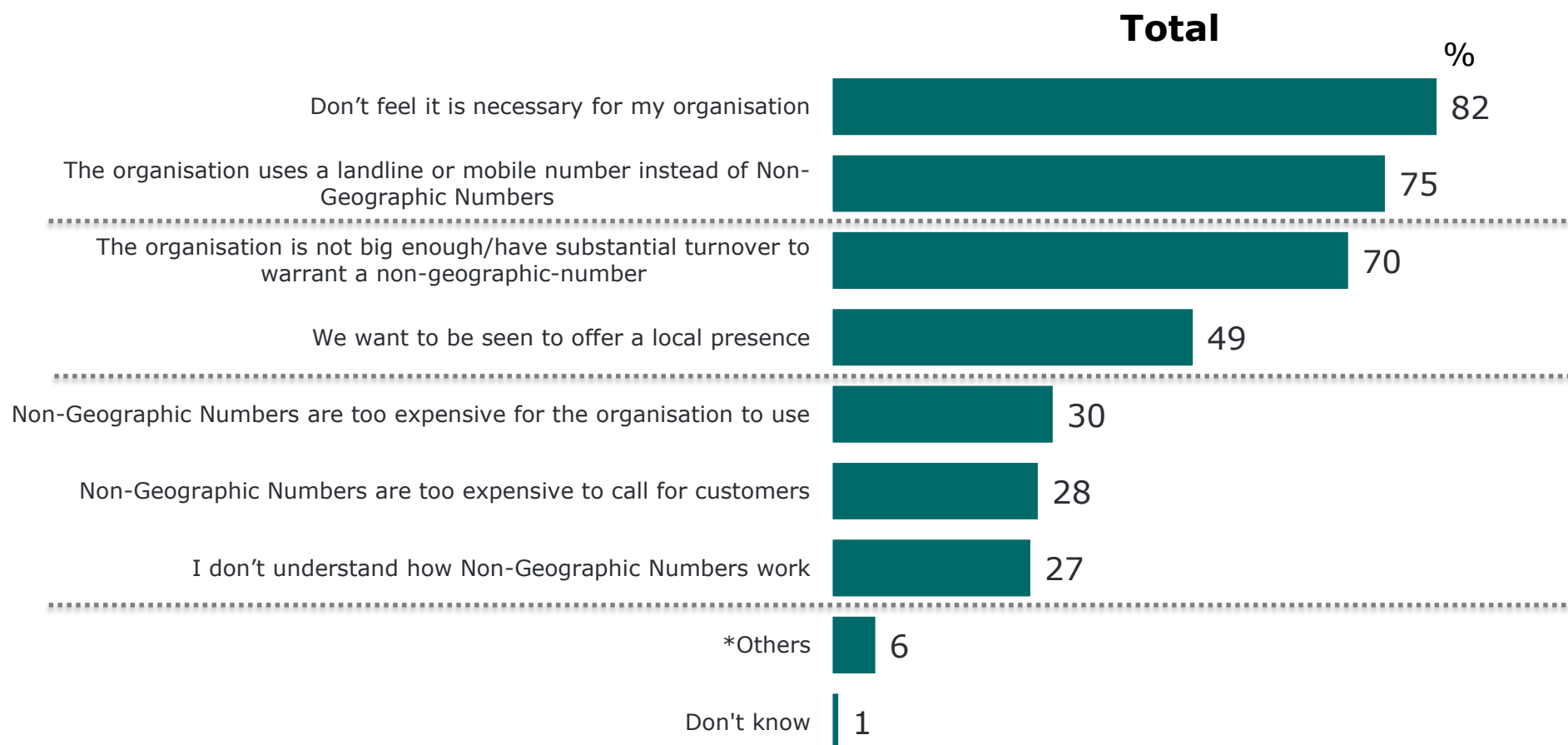
Main responses for each NGN



* Caution small base size.
 **Multiple responses allowed.
 ***Others <3%.

Reasons that organisations do not use NGNs to offer services

Base: All never used NGNs (644)



Main reasons for organisations not using NGNs include not necessary for the organisation, use a landline or mobile number instead and organisation is not big enough/does not have substantial turnover to warrant using a NGN. 3 in 10 do not use NGNs because they consider them too expensive for the organisation to use and a similar number because they consider NGNs too expensive for customers to call.

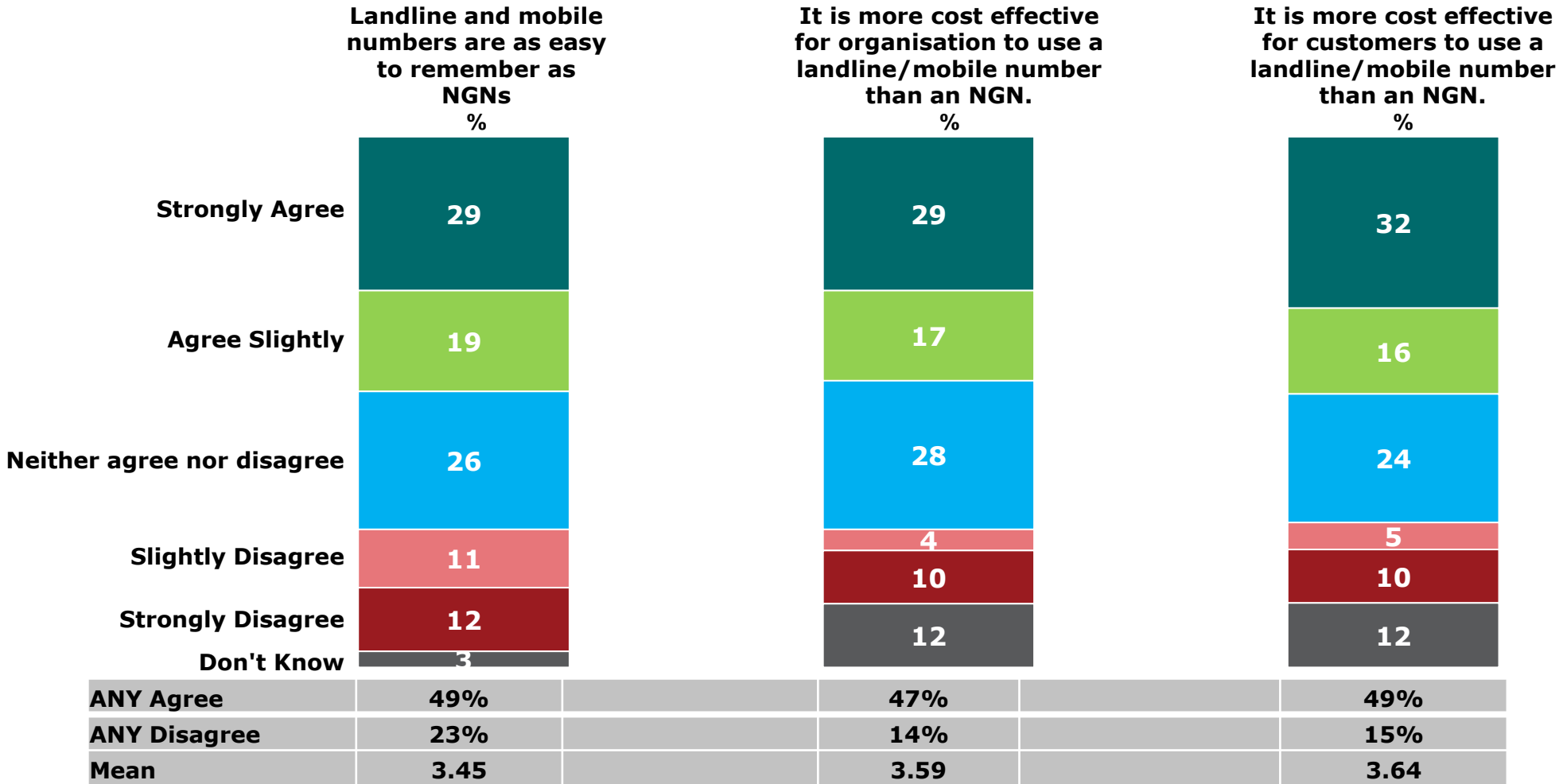
* Others 3% or less.

** Multiple responses allowed.

*** See appendix for data breakdown.

Non-NGN users attitudes towards NGN usage

Base: All never used NGNs but use landline or mobile numbers to provide services (605)



Almost half of non-NGN users believe that landline and mobile numbers are as easy to remember as NGNs, that it is more cost effective for the organisation to use a landline/mobile number instead of a NGN and that it is more cost effective for customers to use a landline/mobile than a NGN. Almost a quarter (23%) did not think landline and mobile numbers are as easy to remember as NGNs.



Q26 Thinking about your organisation's use of landline or mobile numbers as contact numbers, which of the following statements do you agree or disagree with, on a five point scale where 5 = Strongly Agree with and 1 = Strongly Disagree?

The background is a teal-tinted collage of technology. It features a laptop with a 'Laptop Pro' label, a smartphone displaying '11:45', and a tablet showing a 'Monday 25 Nov 2013' date and various app icons like 'Music', 'Search', and 'Nov'.

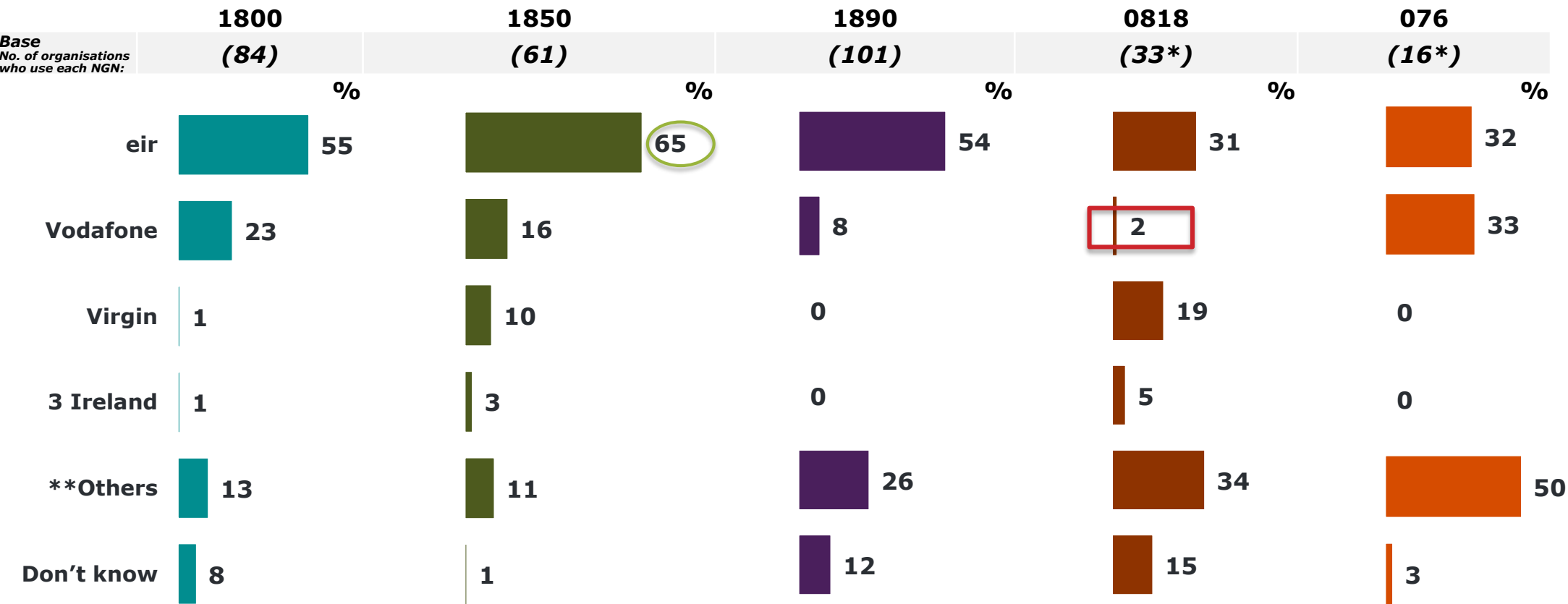
NGN Providers & Packages



Main NGN Provider by NGN number

Base: All currently use each specific NGN

= significantly lower vs all others
 = significantly higher vs all others



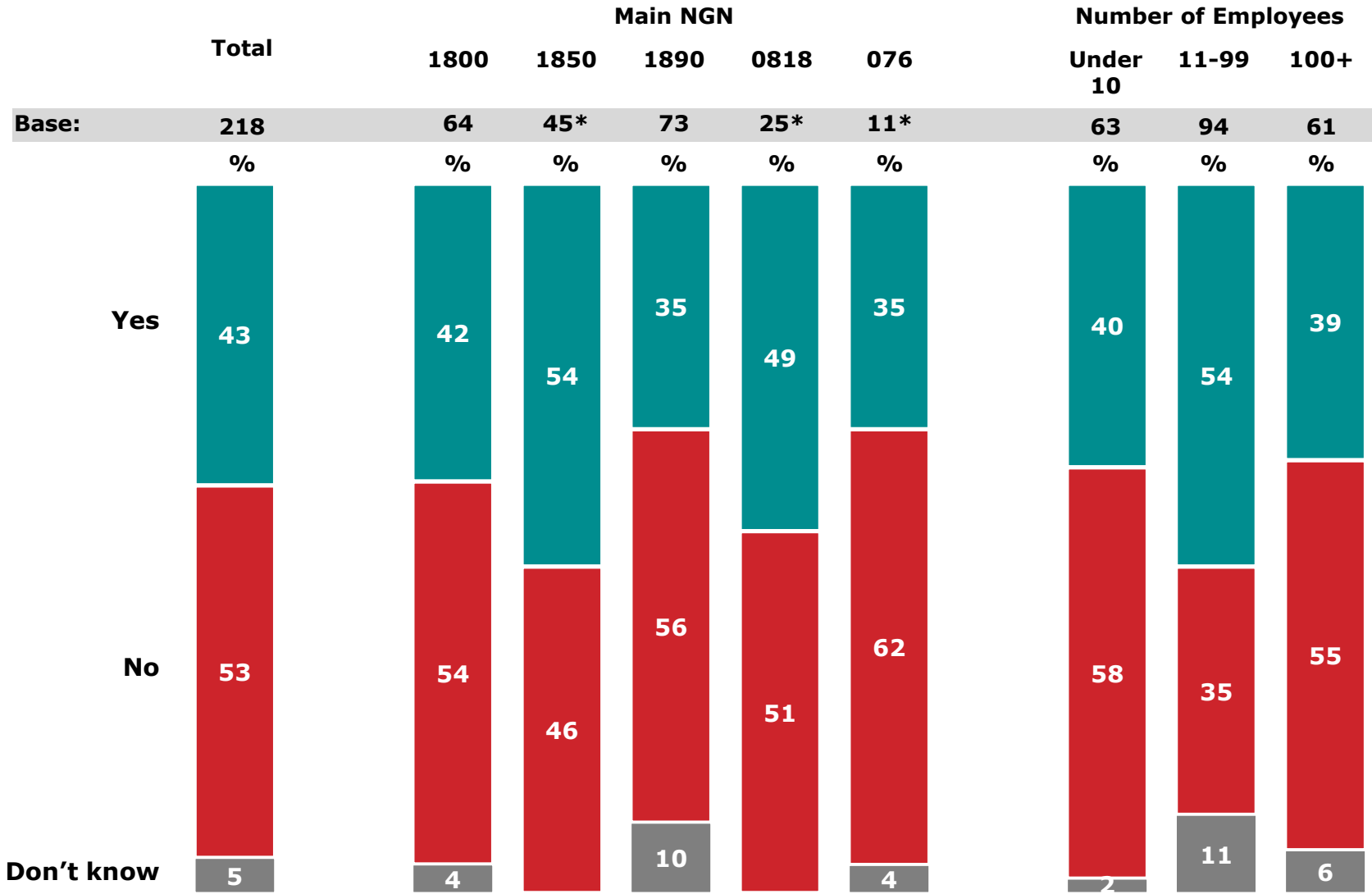
eir is the main provider of NGNs across the board, especially among 1850 customers. Vodafone is a main provider of 076 numbers and Virgin Media a main provider of 0818 numbers.

* Caution small base size.
 ** All others 3% or less.



Incidence of telephony and NGN services being purchased as part of a single contract

Base: All currently use NGNs (218)



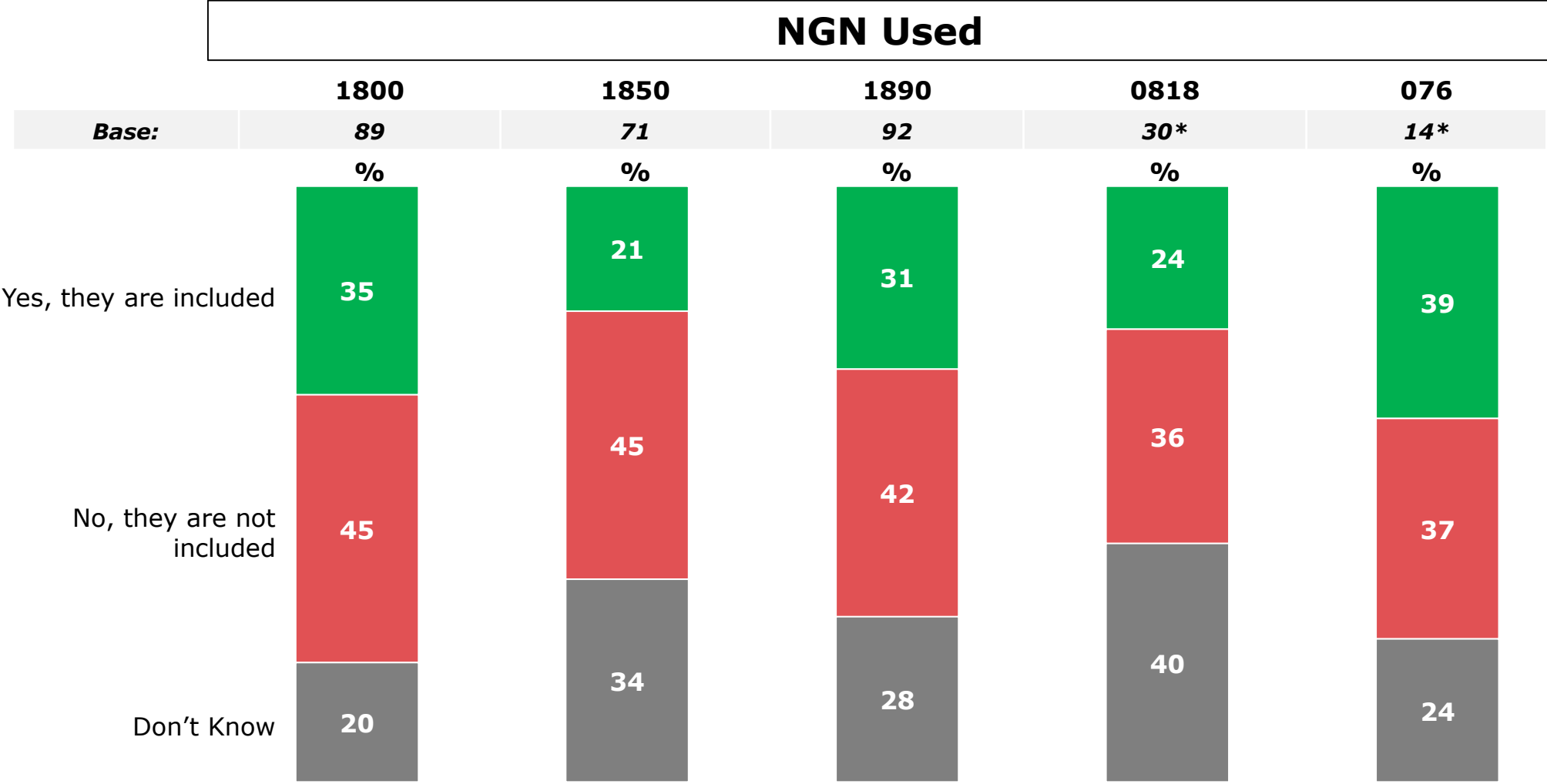
2 in 5 organisations purchased their telephony services (including NGNs) as part of a single contract from the same provider.



* Caution small base size.

Awareness of whether NGN calls are included in landline call packages

Base: All currently use each specific NGN

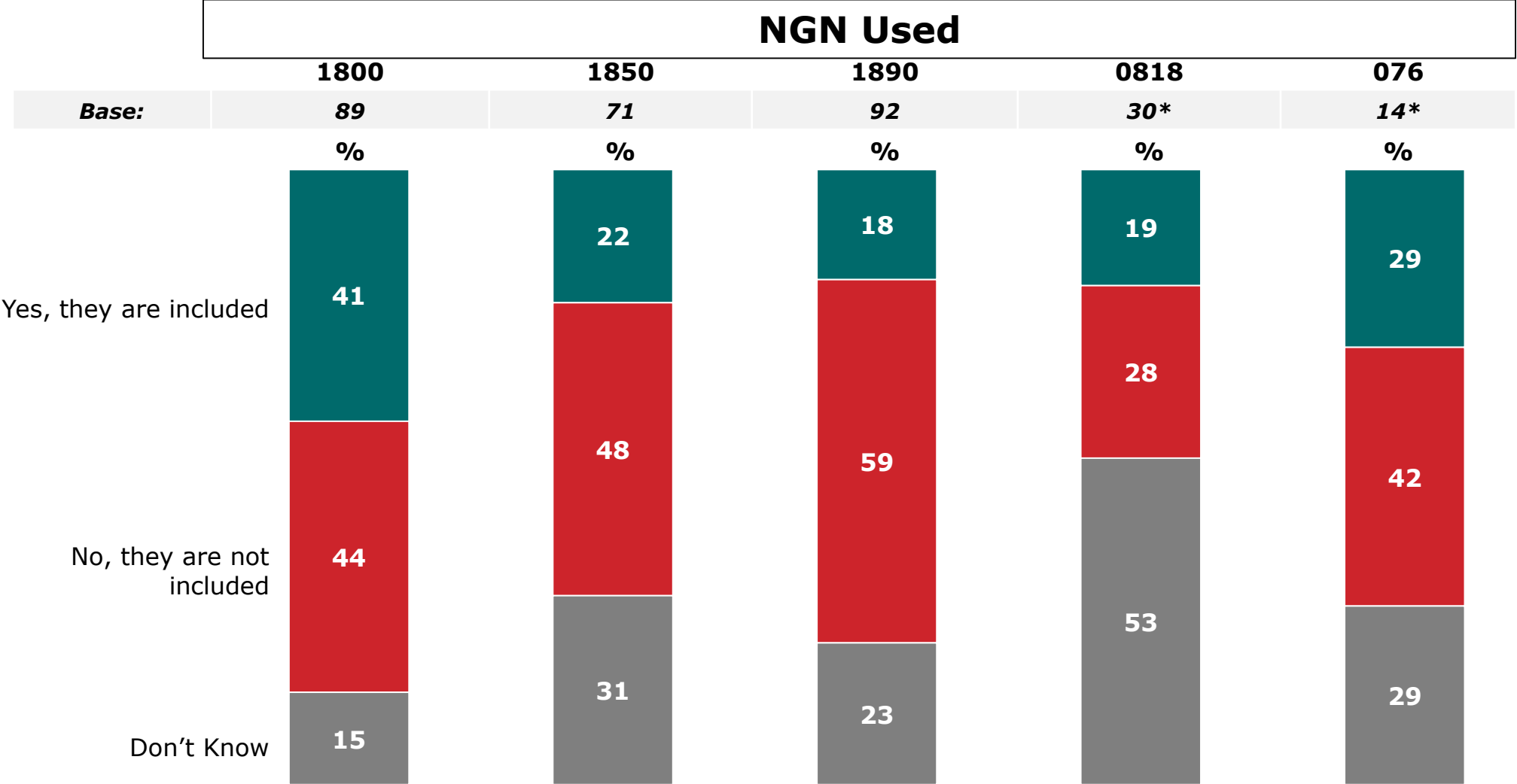


More than a third of current NGN users did not think calls to the NGN they use were included in customers' landline call packages of free telephone minutes. Organisations using 1800, 1890 and 076 numbers are more likely to think that calls made to these NGNs are included.

* Caution small base size.

Awareness of whether NGN calls are included in mobile call packages

Base: All currently use each specific NGN

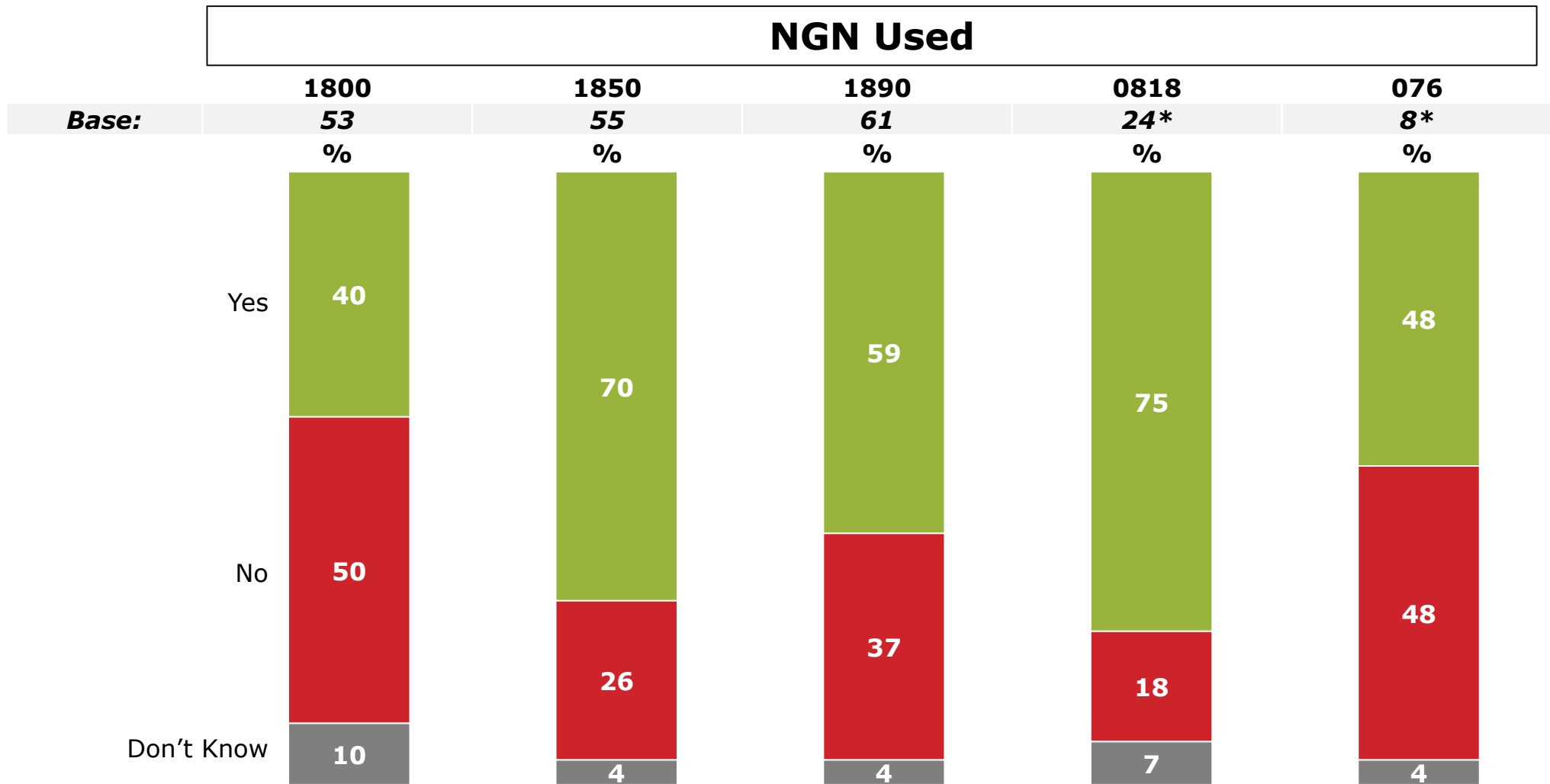


More than a quarter of NGN users (over half for 1890) did not think that calls to the NGN they use were included in customers' mobile call packages of free telephone minutes. Organisations using 1800 and 076 numbers are more likely to think that calls to these NGNs are included.

* Caution small base size.

Incidence of organisations who would consider switching to a landline or mobile number that is included in free bundled minutes for landline callers

Base: All claim NGN is not included in landline package or don't know



Many NGN users who do not think NGNs are included in the bundled minutes for landline callers or do not know would consider switching to a landline or mobile number that is included. Approximately 3 in 5 of those using 1890 NGNs and 7 in 10 using 1850 NGNs would consider switching.

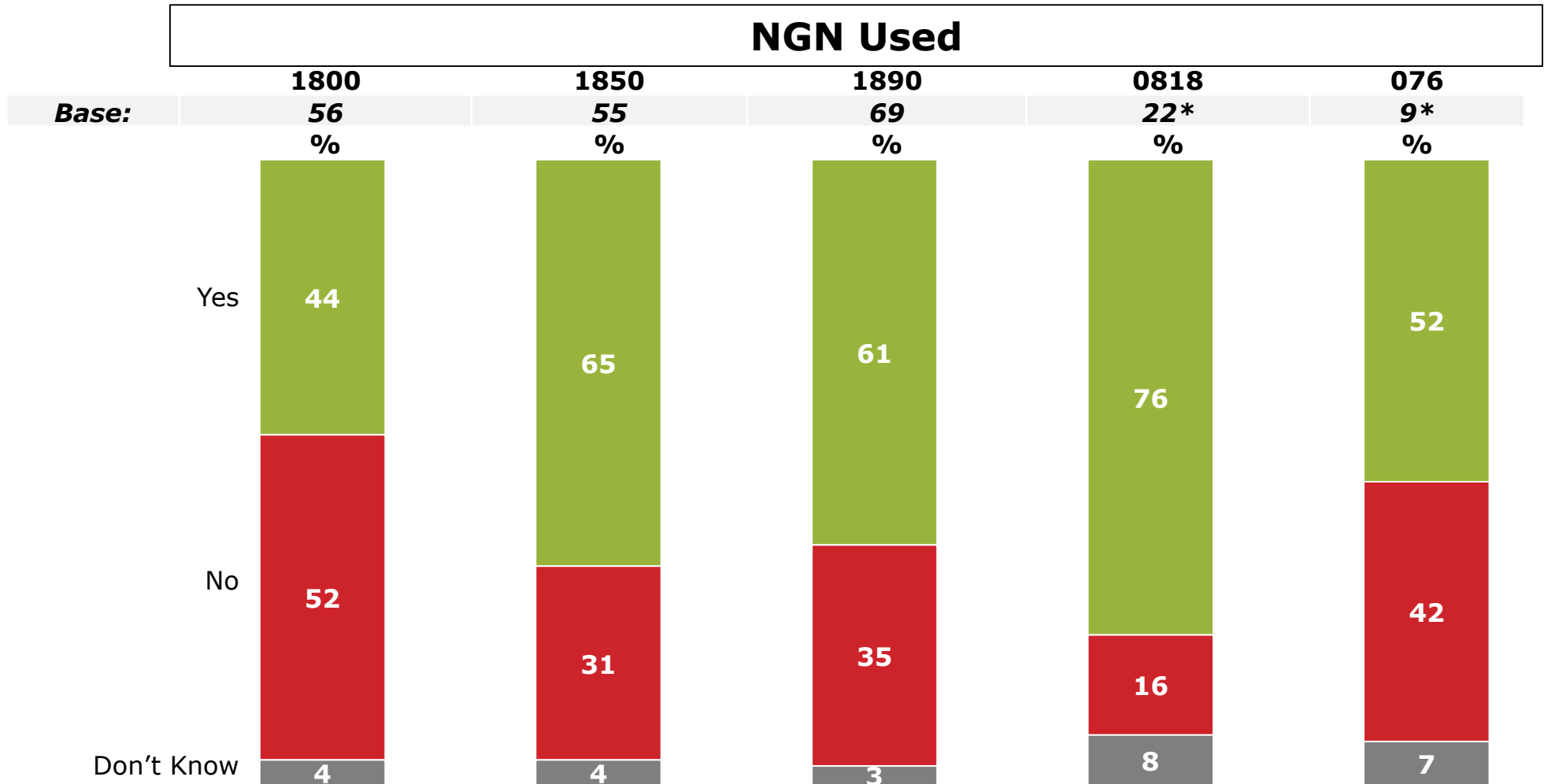
* Caution small base size.



Q.16 If calls to the Non-Geographic-Numbers you offer are not included in bundled minutes for **landline callers** would you consider switching to a landline or mobile number that is included?

Incidence of organisations who would consider switching to a landline or mobile number that is included in free bundled minutes for mobile callers

Base: All claim NGN is not included in mobile package or don't know



Many NGN users who do not think NGNs are included in the bundled minutes for mobile callers or do not know would consider switching to a landline or mobile number that is included. More than 3 in 5 users of 1850 and 1890 NGNs would consider switching.

* Caution small base size.



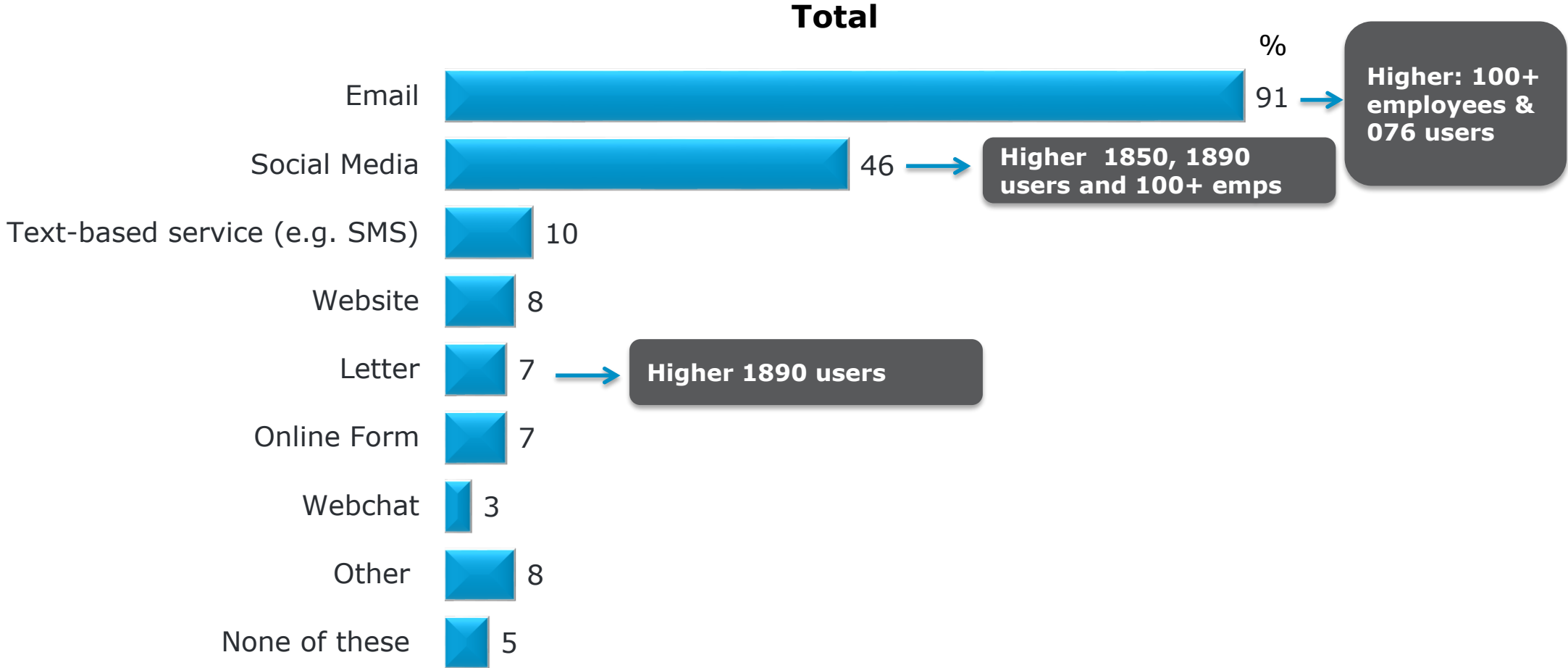
A close-up photograph of two people interacting with a tablet. One person, wearing a blue button-down shirt, is pointing their index finger at the screen. The other person is holding the tablet. The background is blurred, showing what appears to be an office or meeting room with a plant and a window.

Alternative contact methods



Other contact methods provided by businesses

Base: All currently use any number (851)



Others= Fax (4%), marketing / advertising in paper (3%), word of mouth (1%).

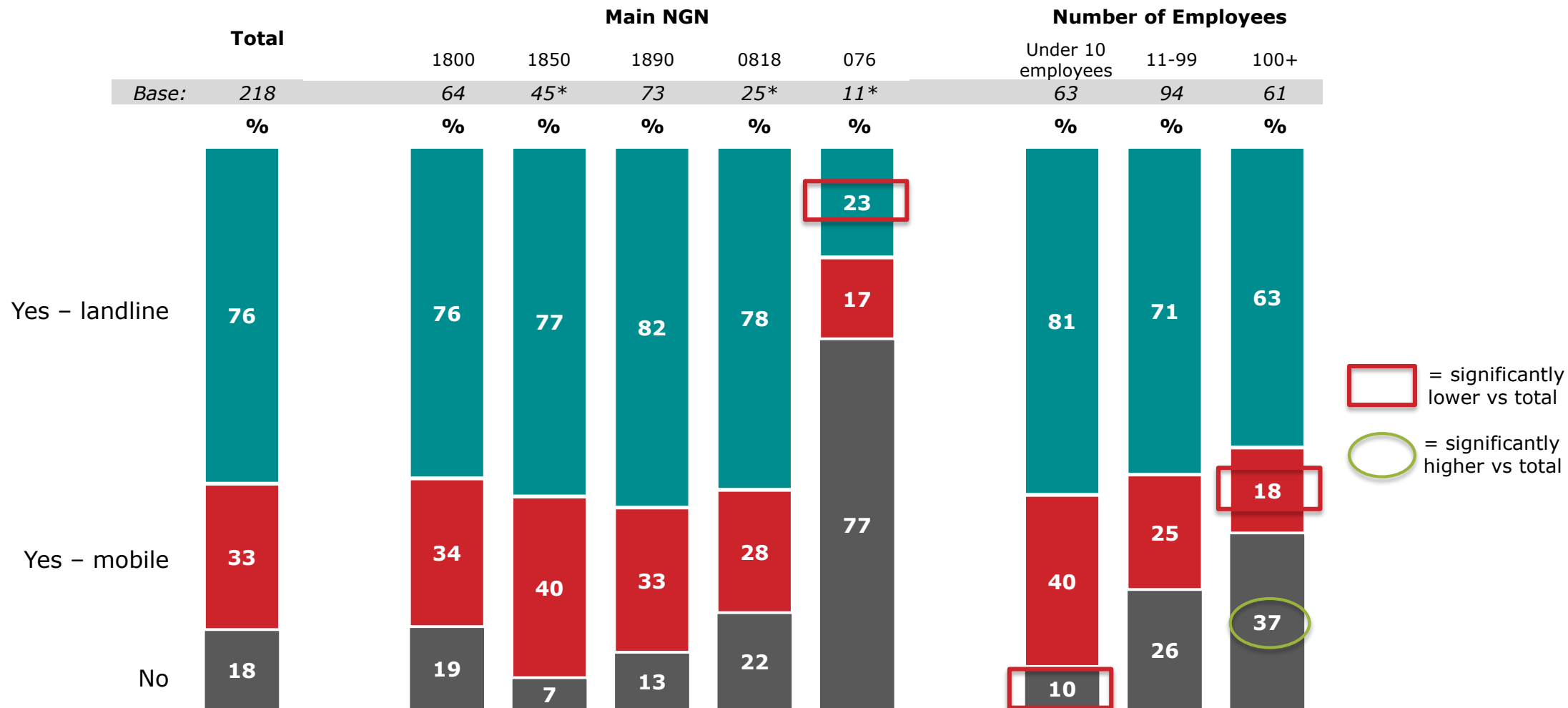
Aside from phone numbers, email is the predominant alternative contact method; its use is higher among larger organisations (100+ employees) and among 076 number users. Almost half of all businesses use social media as an alternative contact method; its use is higher among larger organisations (100+ employees), 1850 and 1890 number users.

** Multiple responses allowed.
 *** See appendix chart for data breakdown.



Provision of alternative landline or mobile number to access same service as the NGN

Base: All currently use NGNs (218)



Among current NGN users, 3 in 4 also provide a landline number and a third provide a mobile number for customers to access the same service as the main NGN.

* Caution small base size.



Main reasons for providing a landline or mobile number for customers to access services

Base: All currently use NGNs & provide a landline or mobile number to access same services (174)

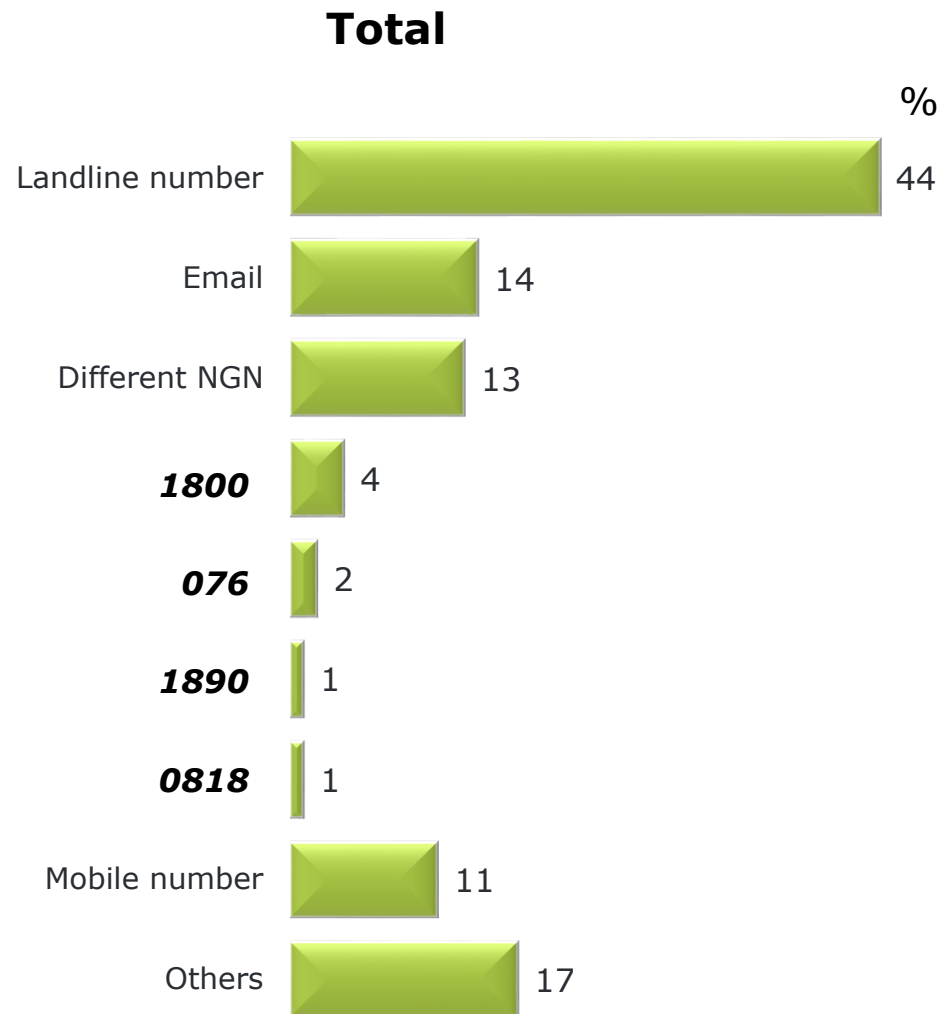


The reasons for providing an alternative landline or mobile number include to give customers an alternative option to calling the NGN and because callers may have free calls to landline/mobile numbers.

* All others 4% or less.
 ** Multiple responses allowed.

Alternative contact method preferences

Base: All currently use NGNs (218)



Others including: social media (3%), online forum (3%), text service (3%) and webchat (2%).

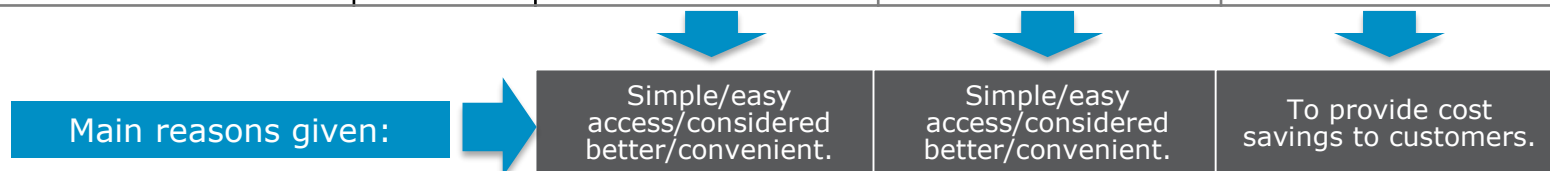
Landline is the main preferred alternative contact method to the main NGN. After that, email or a different NGN were preferred.



Reasons for alternative contact preference

Base: All organisations who would prefer to use a landline, mobile or different NGN (138)

	Total	If you were to use an alternative contact method instead of your Main NGN what would your preferred alternative be?		
		Landline number	Mobile number	Different NGN (specify)
Base:	138	96	15*	27*
	%	%	%	%
Considered to be simple/easy access/considered better/convenient	28	24	61	13
Cost savings to customers	18	17	-	35
Customers prefer to call the number	12	16	-	7
To enable customers to contact us/me directly	12	6	37	10
Instant/direct	8	4	34	1
Cost savings to the organisation	7	6	-	15
To provide a local presence	7	10	-	-
Backup/other option	4	2	-	15
Tradition	4	6	-	1
Can be reached internationally	3	5	-	-
To provide customers with an alternative option	3	3	-	2
Others***	25	26	13	33
Don't know	5	5	-	8



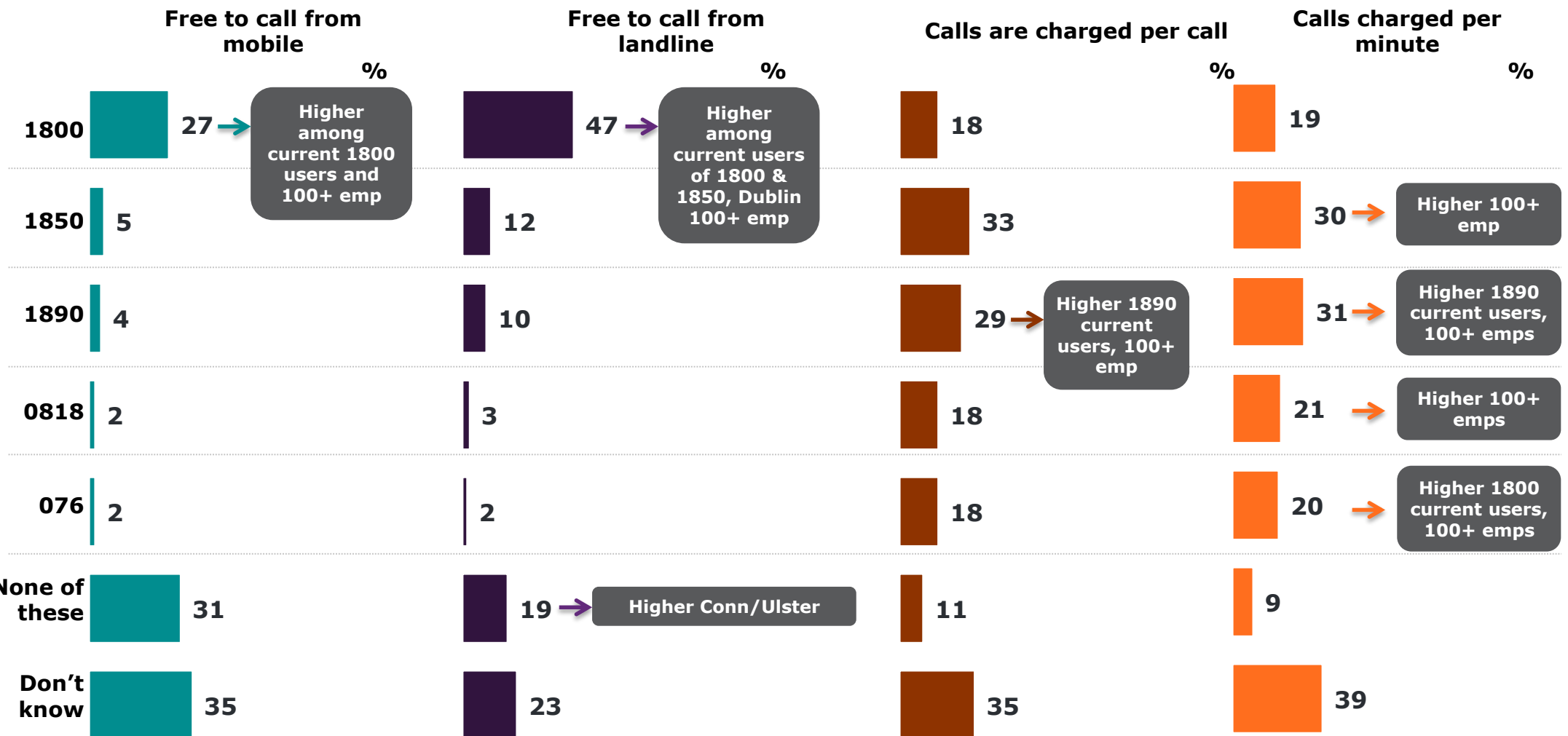
*** All others 2% or less.
 ** Multiple responses allowed.
 * Caution small base size.

Awareness and attitudes towards customer call costs



Awareness of NGN Costs

Base: All aware of NGNs (870)



While there is some understanding that 1800 NGNs are free to call, organisations are confused about how calls to 1850 and 1890 numbers are charged.

** Multiple responses allowed.

*** See appendix chart for data breakdown.



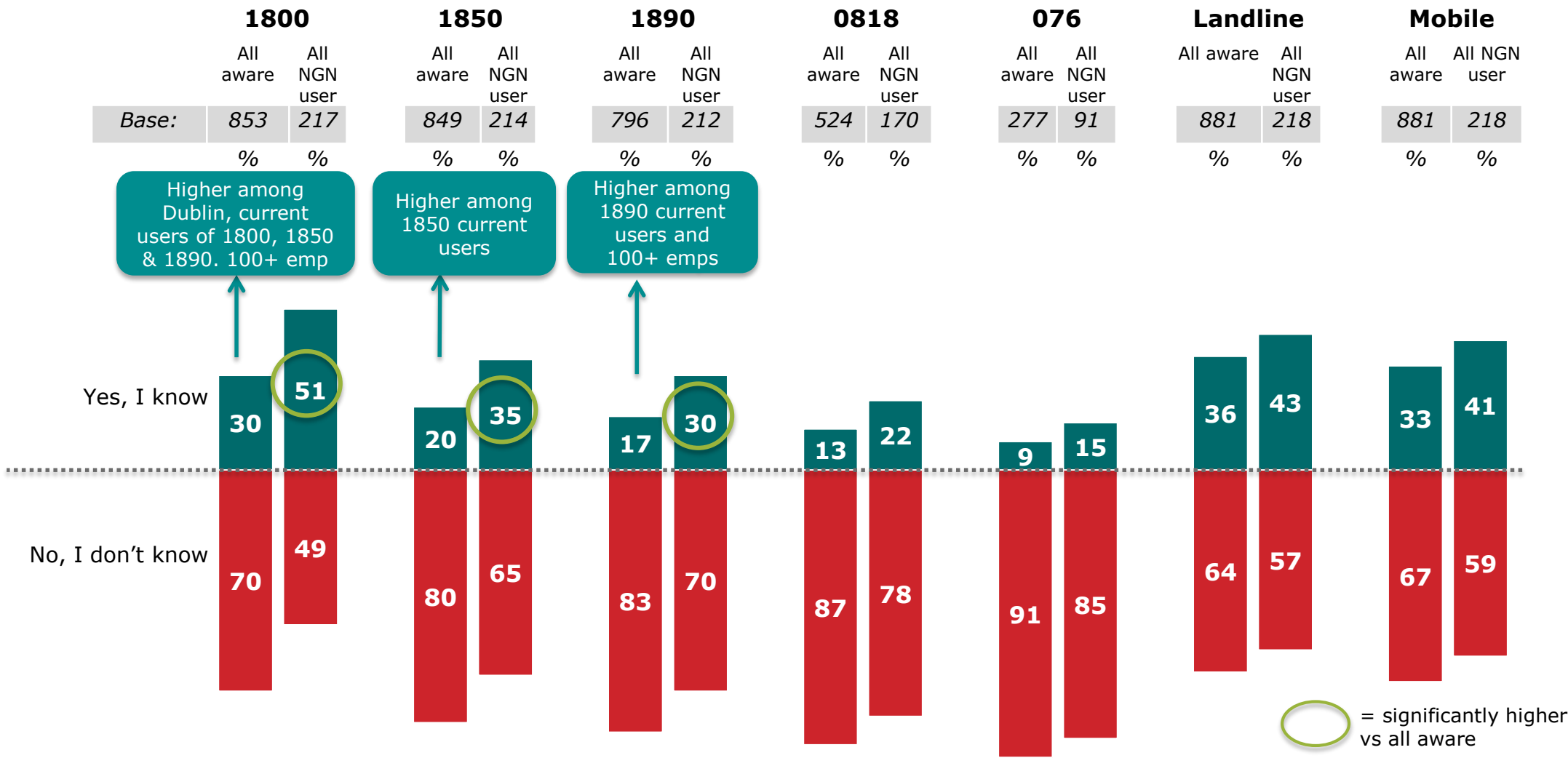
Q27 Of the Non-Geographic-Numbers 1800, 1850, 1890, 0818 and 076, which NGN or NGNs do you associate with each of the following statements?

Awareness of call costs from landline

Base: All aware of specific number

'All NGN user' is all those who use NGNs and are aware of that specific number type.

Aware of specific number



Cost awareness of calling NGNs, landlines and mobiles from a landline is low. Current users of 1800, 1850 and 1890 NGNs claimed significantly higher awareness of call costs from landline to each of those NGNs.

*** See appendix chart for data breakdown.

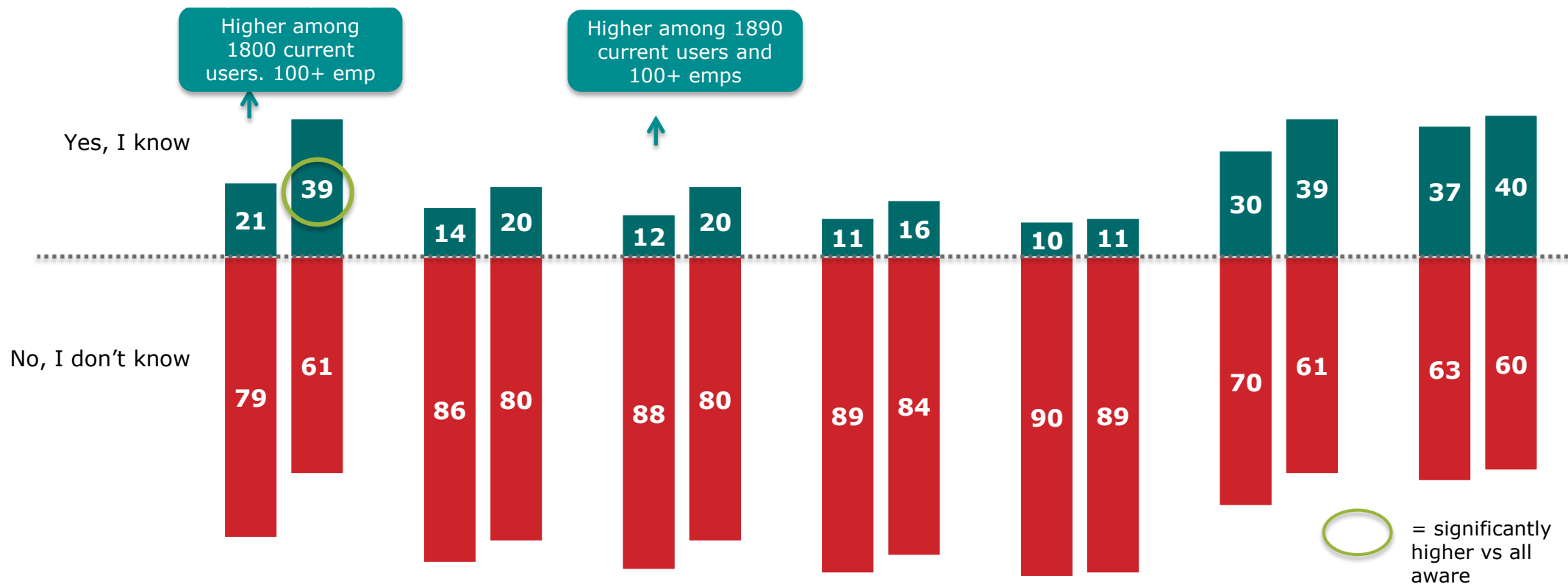
Awareness of call costs from mobile

Base: All aware of specific number

'All NGN user' is all those who use NGNs and are aware of that specific number type.

Aware of specific number

	1800		1850		1890		0818		076		Landline		Mobile	
	All aware	All NGN user	All aware	All NGN user	All aware	All NGN user	All aware	All NGN user	All aware	All NGN user	All aware	All NGN user	All aware	All NGN user
Base:	853	217	849	214	796	212	524	170	277	91	881	218	881	218
	%	%	%	%	%	%	%	%	%	%	%	%	%	%



Cost awareness of calling NGNs, landlines and mobiles from a mobile is low. Current users of 1800 NGNs claimed significantly higher awareness of call costs from mobile to 1800 NGNs.

***See appendix for data breakdown.

Call estimates (I)

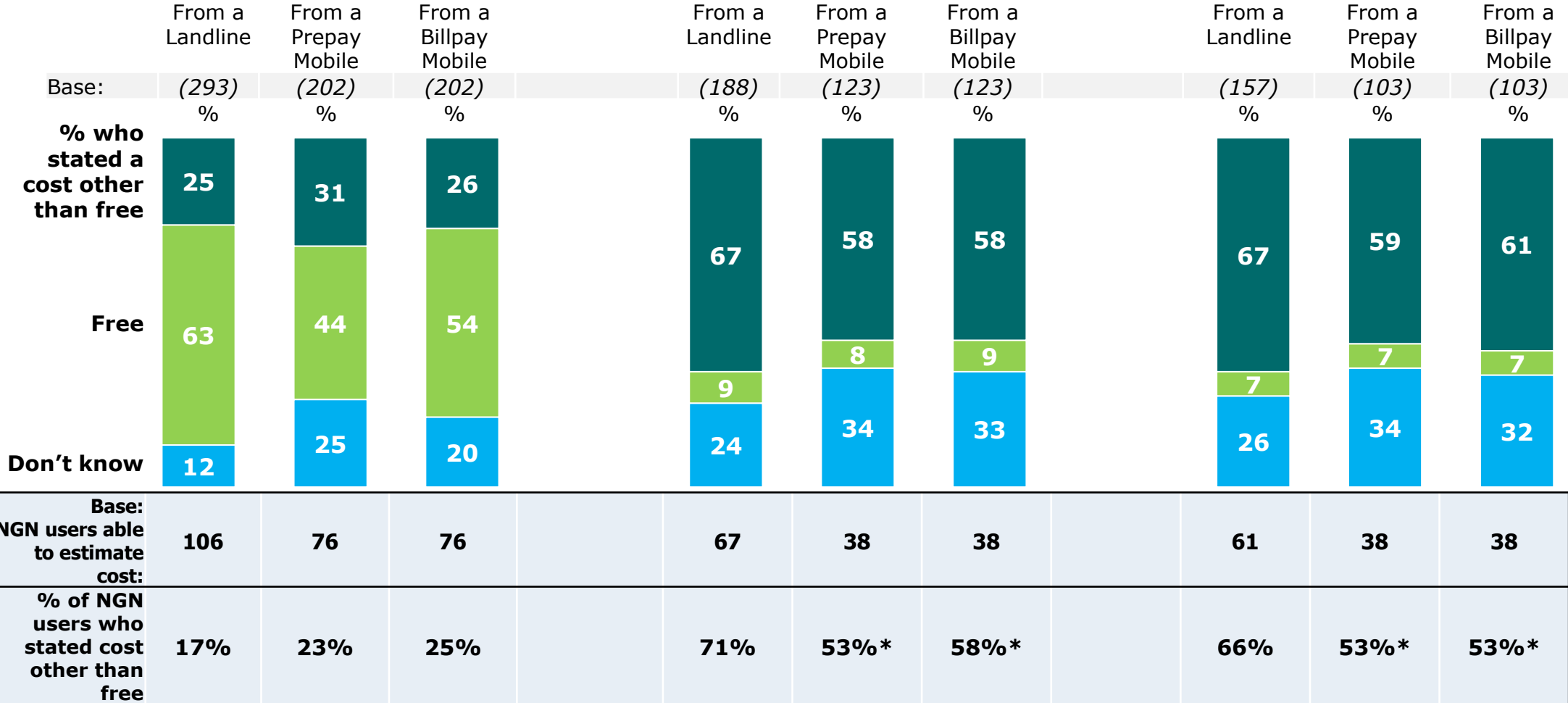
Base: All who claim to know typical costs

Cost of calls to NGN number

1800

1850

1890



A majority correctly reported that 1800 numbers are free to call.

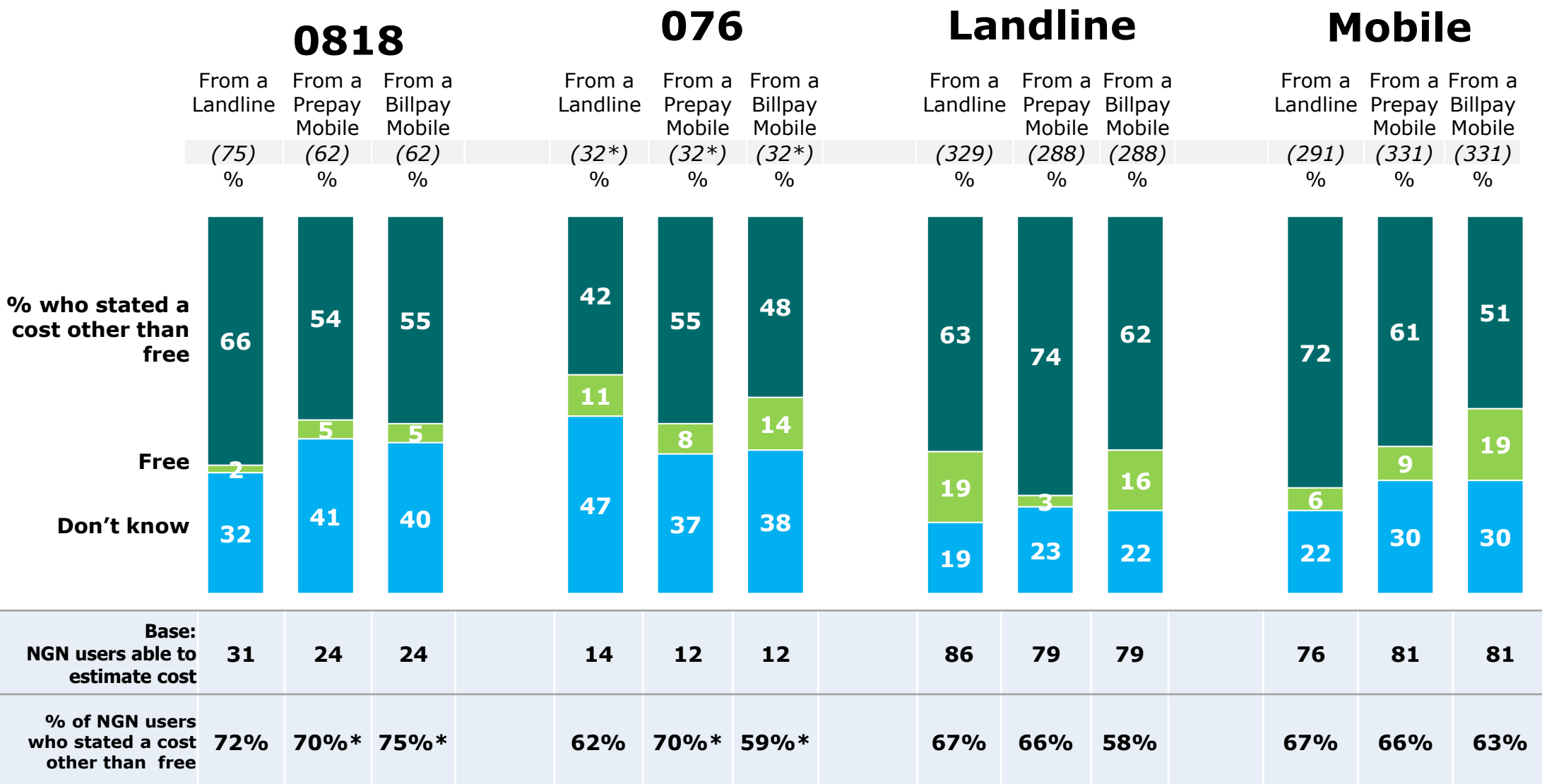
* Caution small base size.



Q29 How much, in euro cents, do you think it typically costs a customer per minute/per call to call a [ask for each type of number coded Yes at Q28 and 28a] during business hours on each of the following?

Call estimates (II)

Base: All who claim to know typical costs



Higher percentage of respondents claimed to know the cost of calls to landlines and mobiles than to most NGNs.

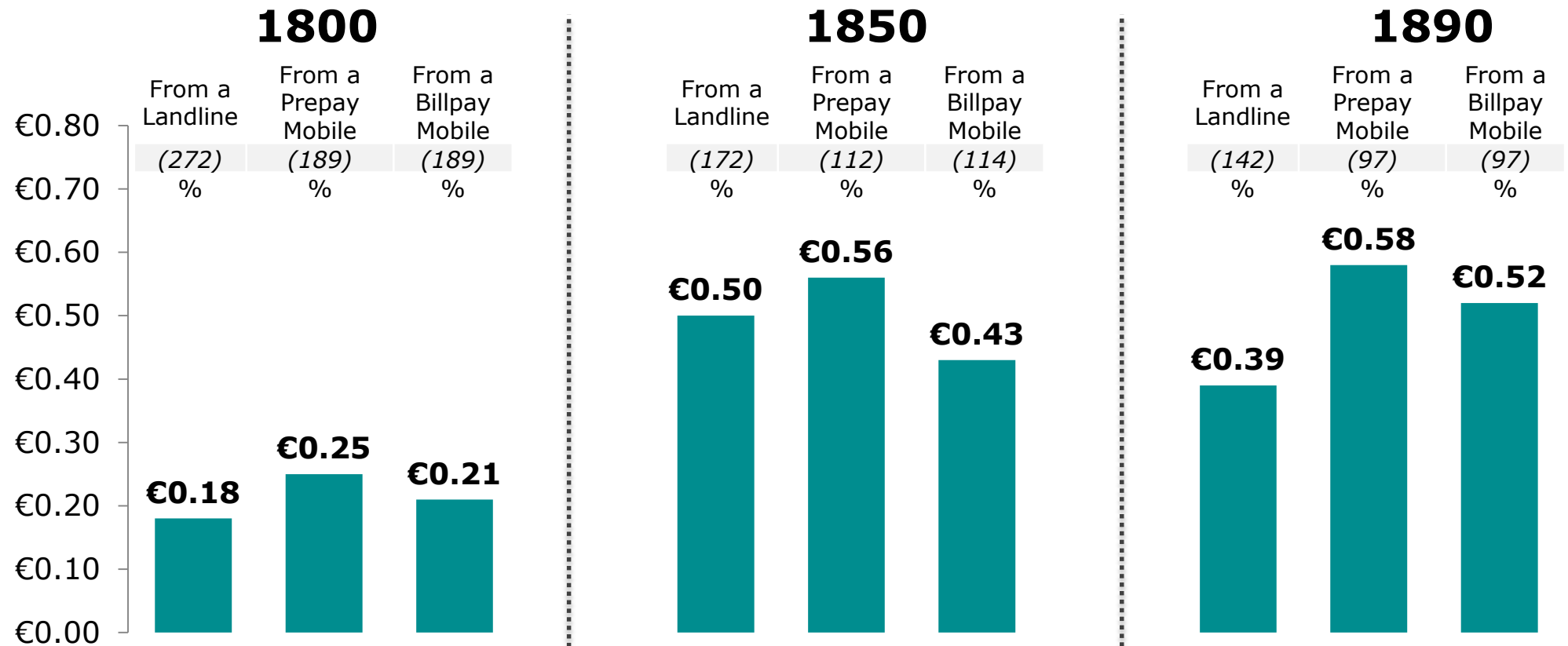
* Caution small base size.



Estimated customer cost per minute/per call to NGN, landline or mobiles – I

** Estimated customer cost based on mean score across all respondents able to estimate a cost.

Base: All who claim to know typical cost and can estimate costs (including those who estimate costs as free)



Base: NGN users able to estimate cost	96	70	70		59	36*	36*		52	36*	36*
NGN Users estimated average cost	€0.08	€0.07	€0.07		€0.23	€0.28	€0.25		€0.24	€0.28	€0.30

1800 calls were estimated as cheaper than 1850 and 1890 calls. However, the estimated average call cost for 1800 was greater than zero, despite 1800 NGNs being free to call.

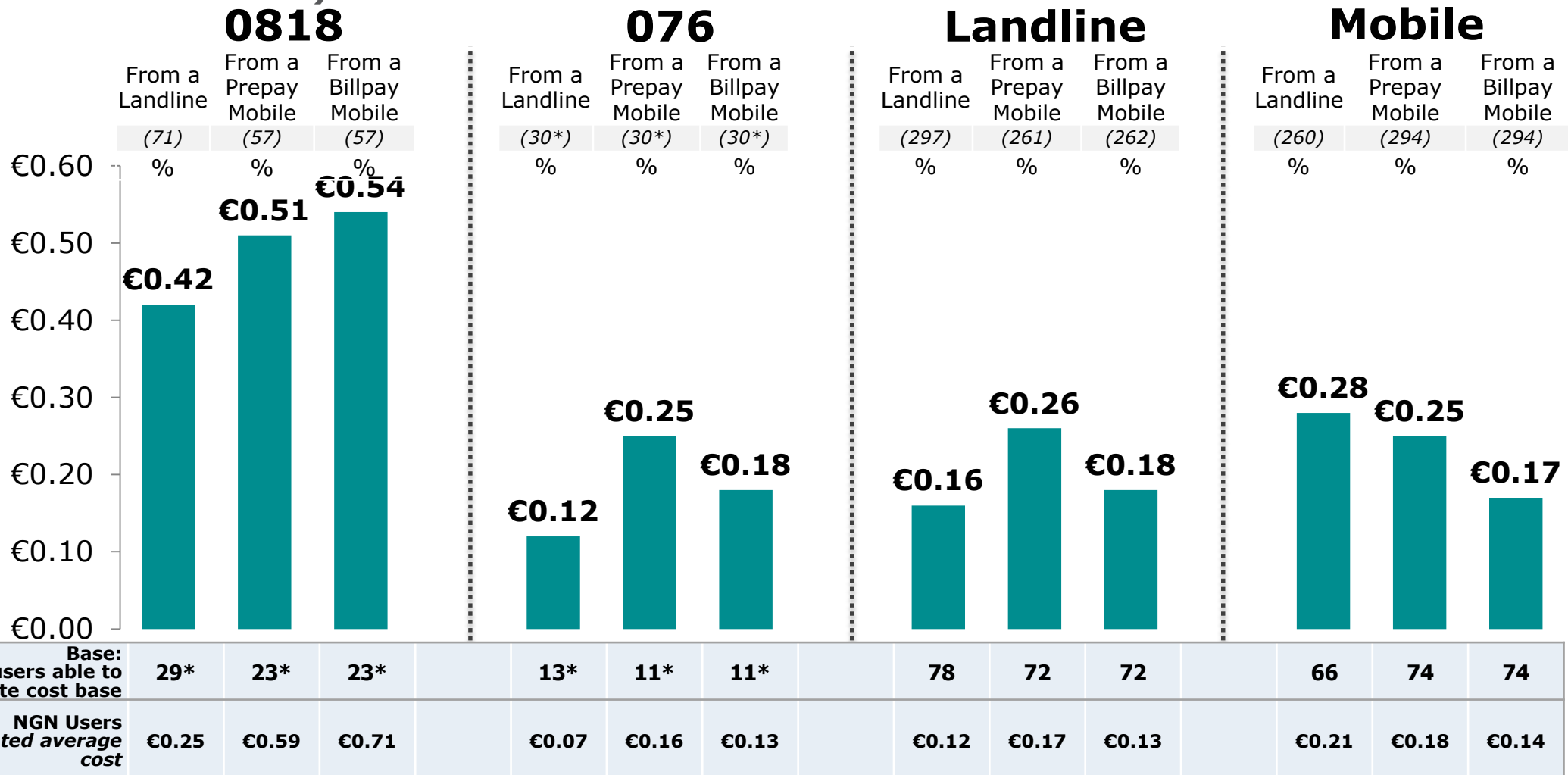
* Caution small base size.



Estimated customer cost per minute/per call to NGN, landline or mobile – II

** Estimated customer cost based on mean score across all respondents able to estimate a cost.

Base: All who claim to know typical cost and can estimate costs (including those who estimate costs as free)



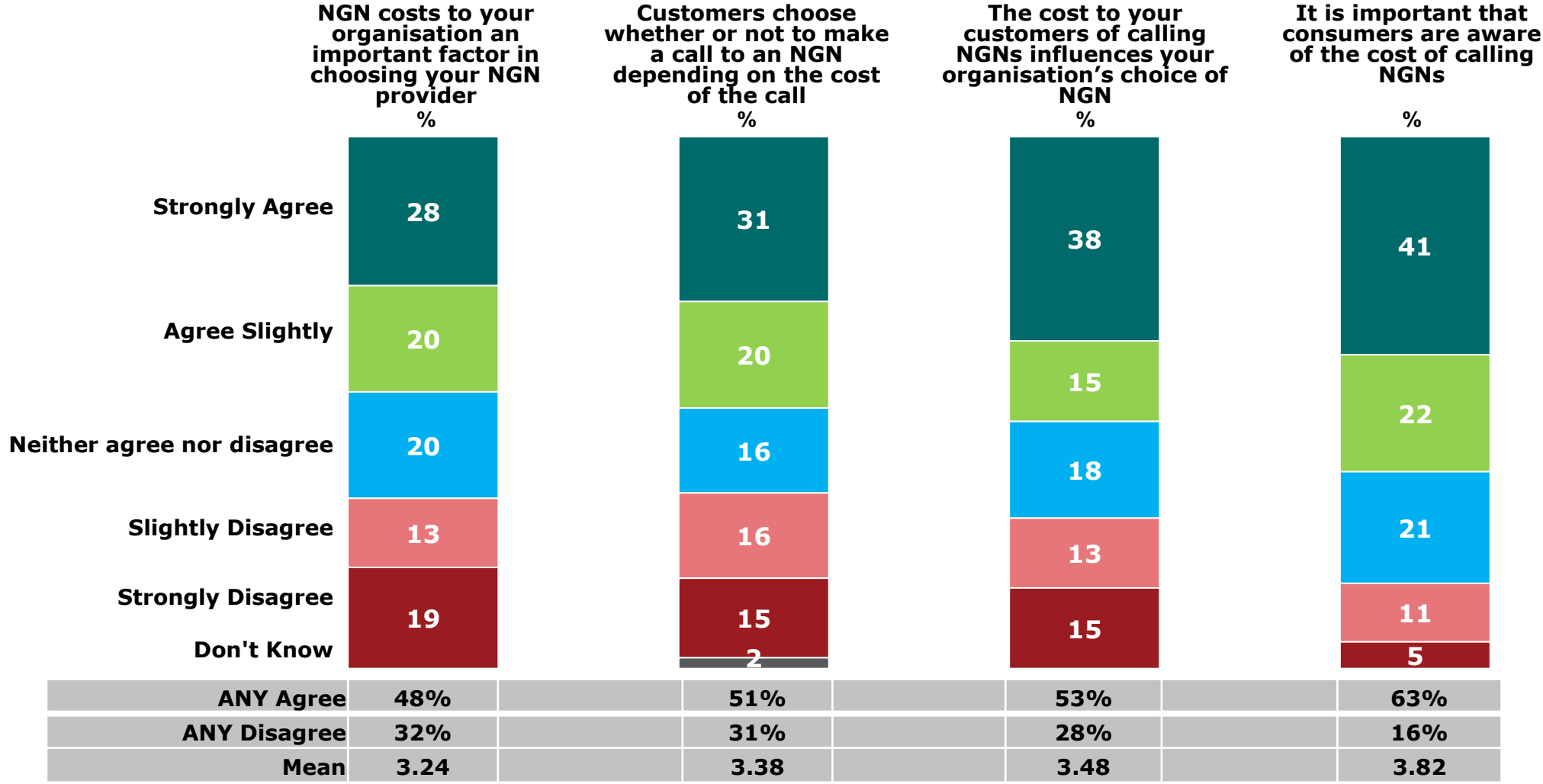
Calls to 0818 are estimated at between €0.42 and €0.54 per minute, while calls to landlines and mobiles are viewed as much cheaper.

* Caution small base size.



NGN users' attitudes towards NGN costs

Base: All currently use NGNs (218)



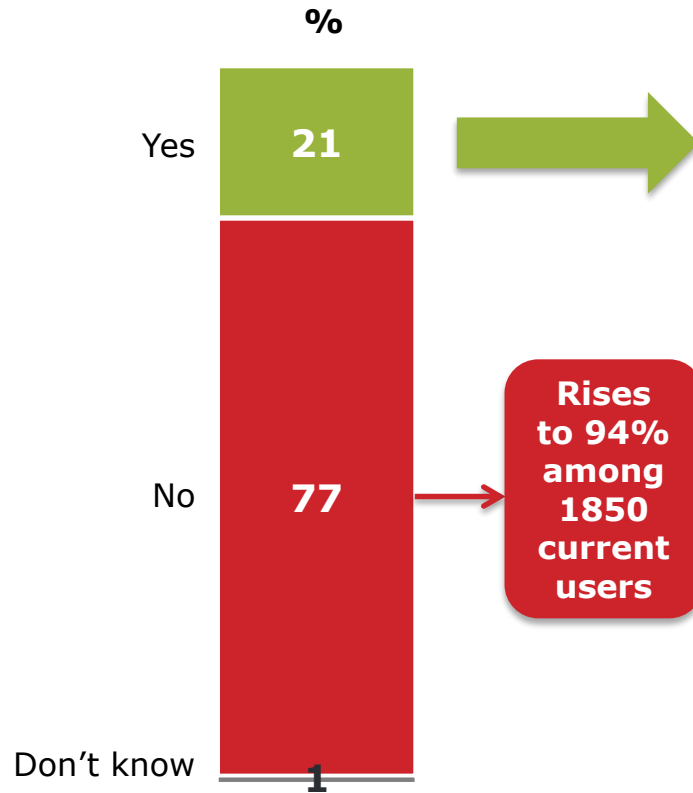
Almost half of current NGN users consider NGN costs to their organisation an important factor in choosing their NGN provider. Over half consider that the customer cost of calling NGNs influences the organisation's choice of NGN and that customers choose whether or not to make a call to a NGN depending on the cost of the call. 3 in 5 think it is important that customers are aware of the cost of calling NGNs.

*See appendix for data breakdown.



Organisations providing guidance to customers on the cost of calling NGNs

Incidence of organisations who provide guidance to customers on cost of calling NGNs
(Base: All currently use NGNs 218)



How guidance is provided

(Base: Yes provide guidelines 51) %



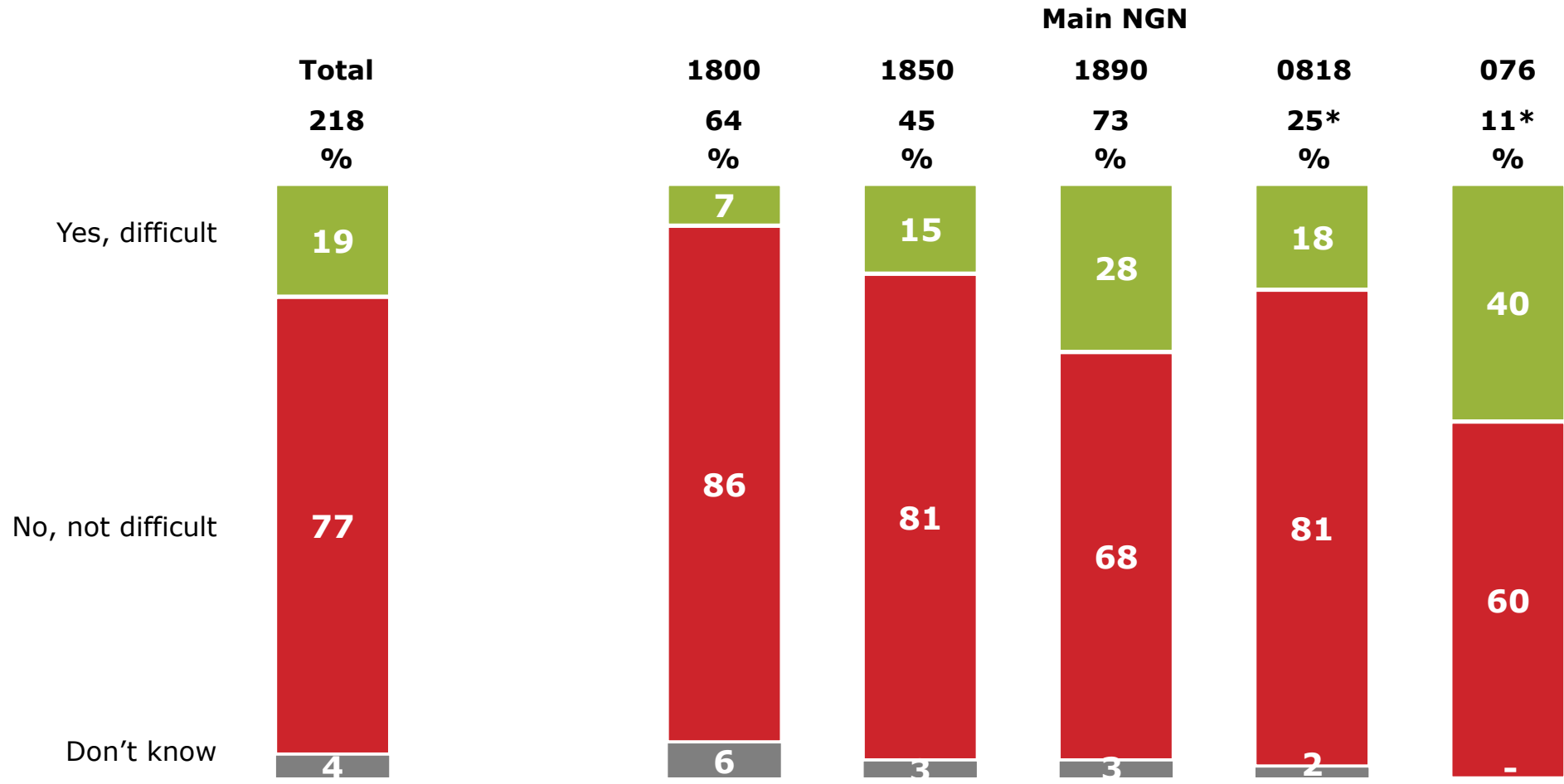
The majority of current NGN users do not provide guidance to customers on the cost of calling NGNs and this is higher among 1850 users. Just 1 in 5 claim to provide guidance and this is mainly done through advertising, website, email or social media.

***Multiple responses allowed.*



Difficulty informing customers of the exact cost of calling NGN

Base: All currently use NGNs (218)



3 in 4 NGN users do not consider it difficult to inform customers of exact cost of calling the NGN they use. 1 in 5 believe it is difficult to inform customers of the exact costs of calling and this appears to be more of an issue for 1890 and 076 number users.

* Caution small base size.



Q32 Does your organisation face difficulties informing your customers of the exact cost of calling your Non-Geographic-Number(s)? For example, due to different prices set by different networks/providers?

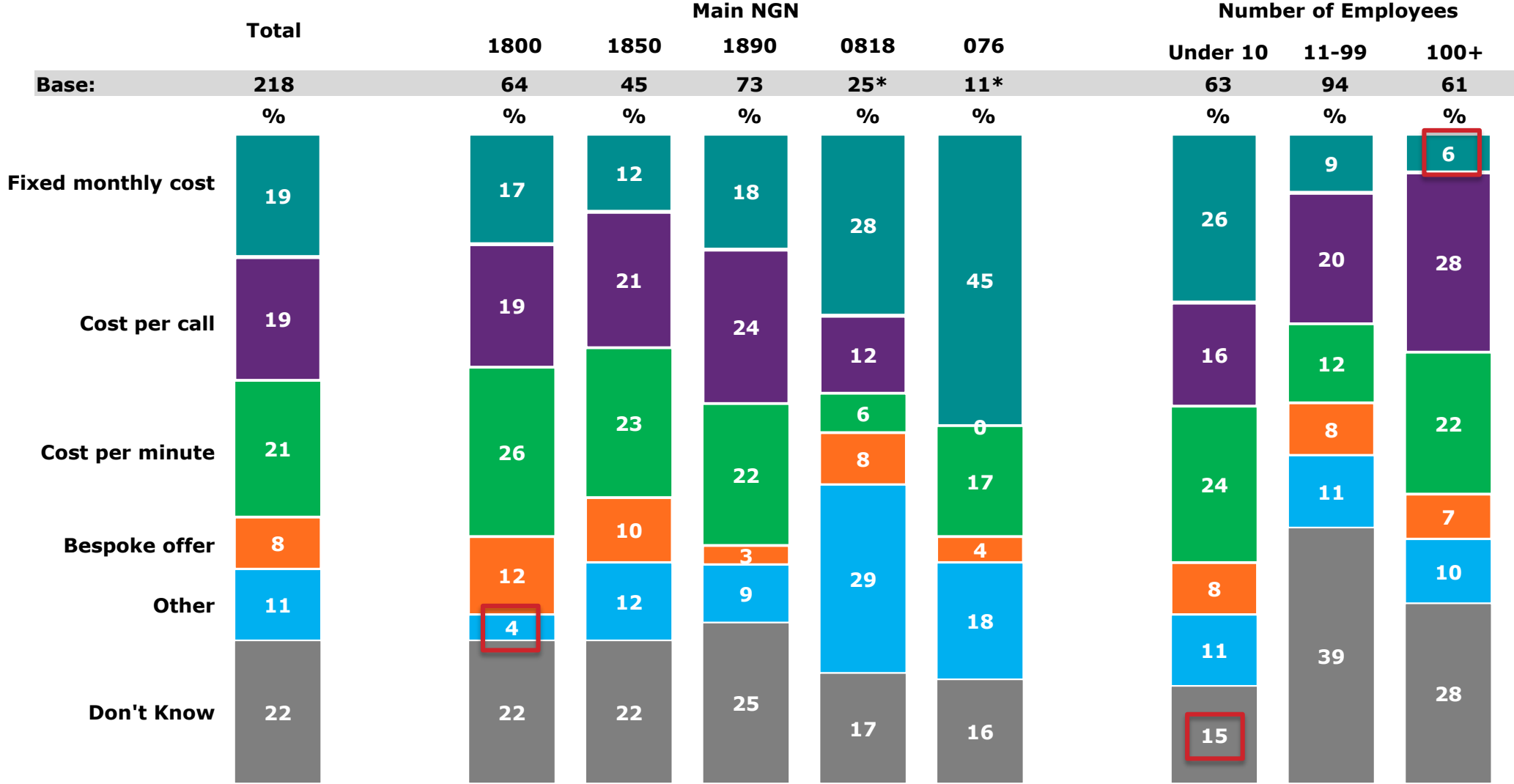
Awareness & attitudes towards organisation call costs



NGN charging structures for receiving calls

Base: All currently use NGNs (218)

 = significantly lower vs total



NGN charging structures (at total level) are fairly evenly spread across fixed monthly cost, cost per call and cost per minute. However, an average of 1 in 5 NGN users do not know the charging structure to their organisation for receiving calls to the main NGN.

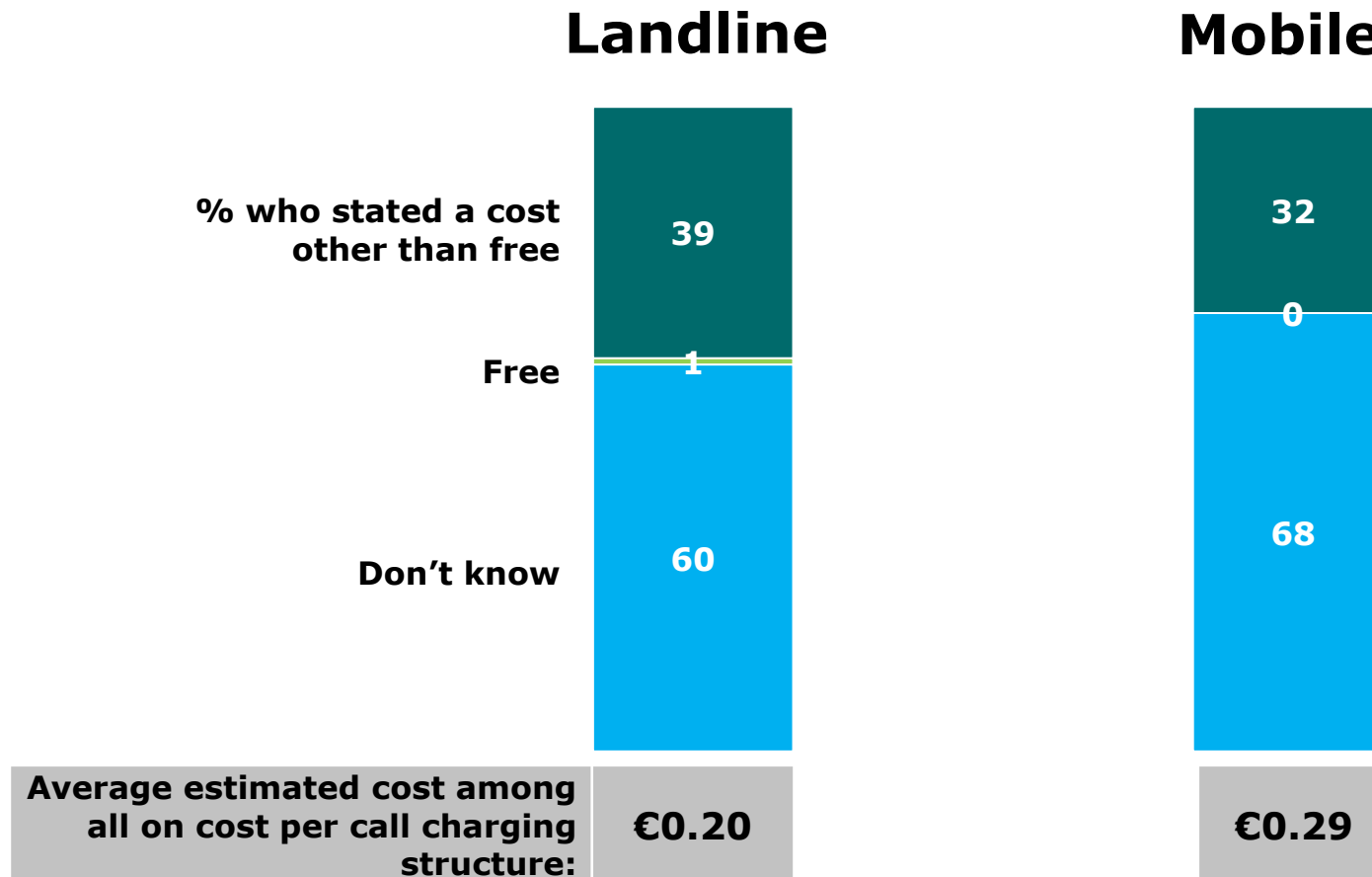
* Caution small base size.



Q34 You indicated that your main NGN is [insert main NGN from Question 6a], what is the charging structure to your organisation for receiving calls to this Non-Geographic-Number?

NGN user cost estimates for receiving NGN calls (per call)

Base: All organisations on cost per call charging structure (45)*



3 in 5 NGN users on a per call charging structure do not know how much it costs their organisation to receive calls from a landline or mobile to the main NGN. The average estimated per call cost for organisations to receive a call from a landline is €0.20 and €0.29 from a mobile.

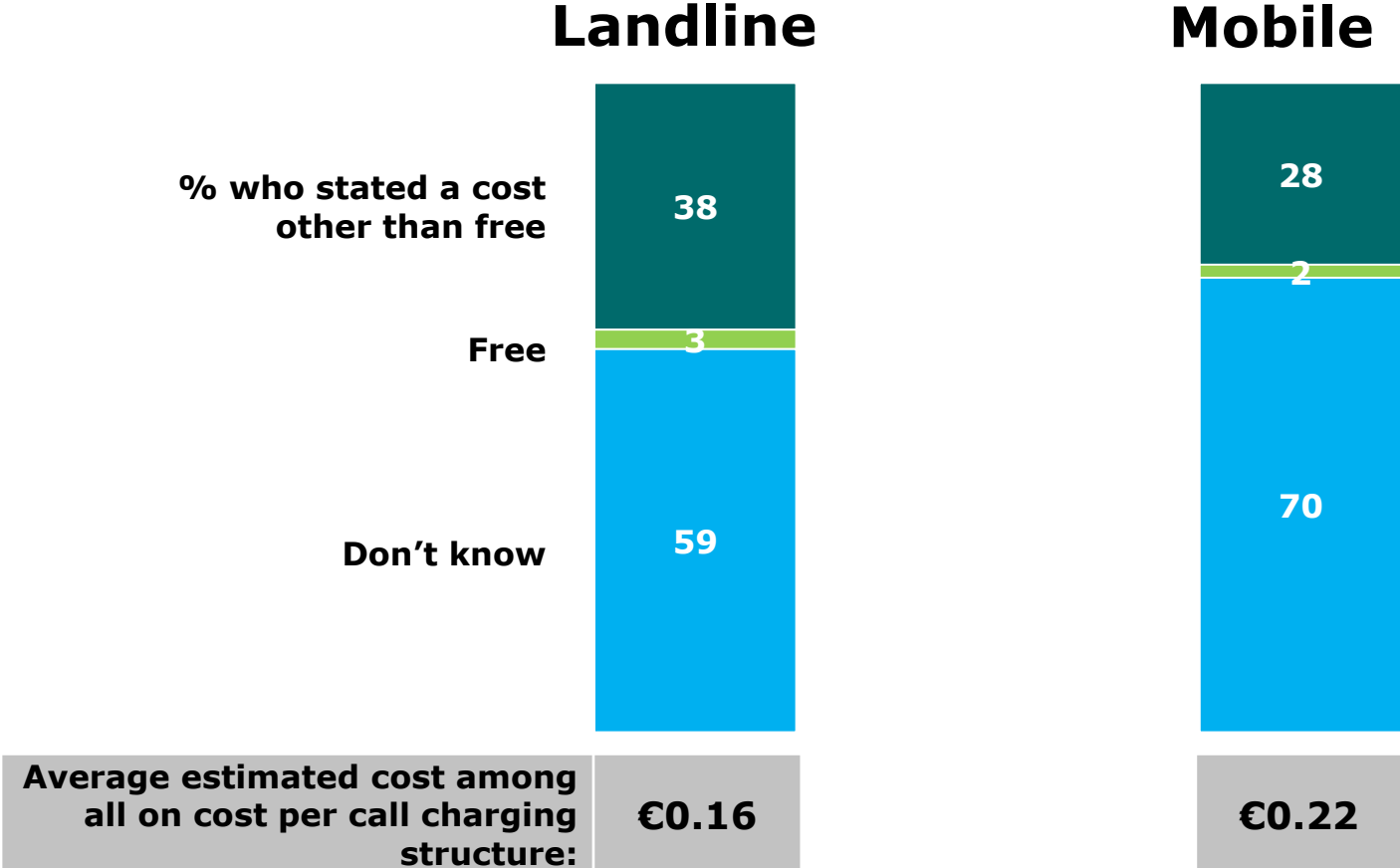
* Caution small base size.



Q35 How much, in euro cents, do you think it costs your organisation per call to **receive** calls from a landline /mobile to your main NGN?

NGN user cost estimates for receiving NGN calls (per minute)

Base: All organisations on cost per minute call charging structure (48)*



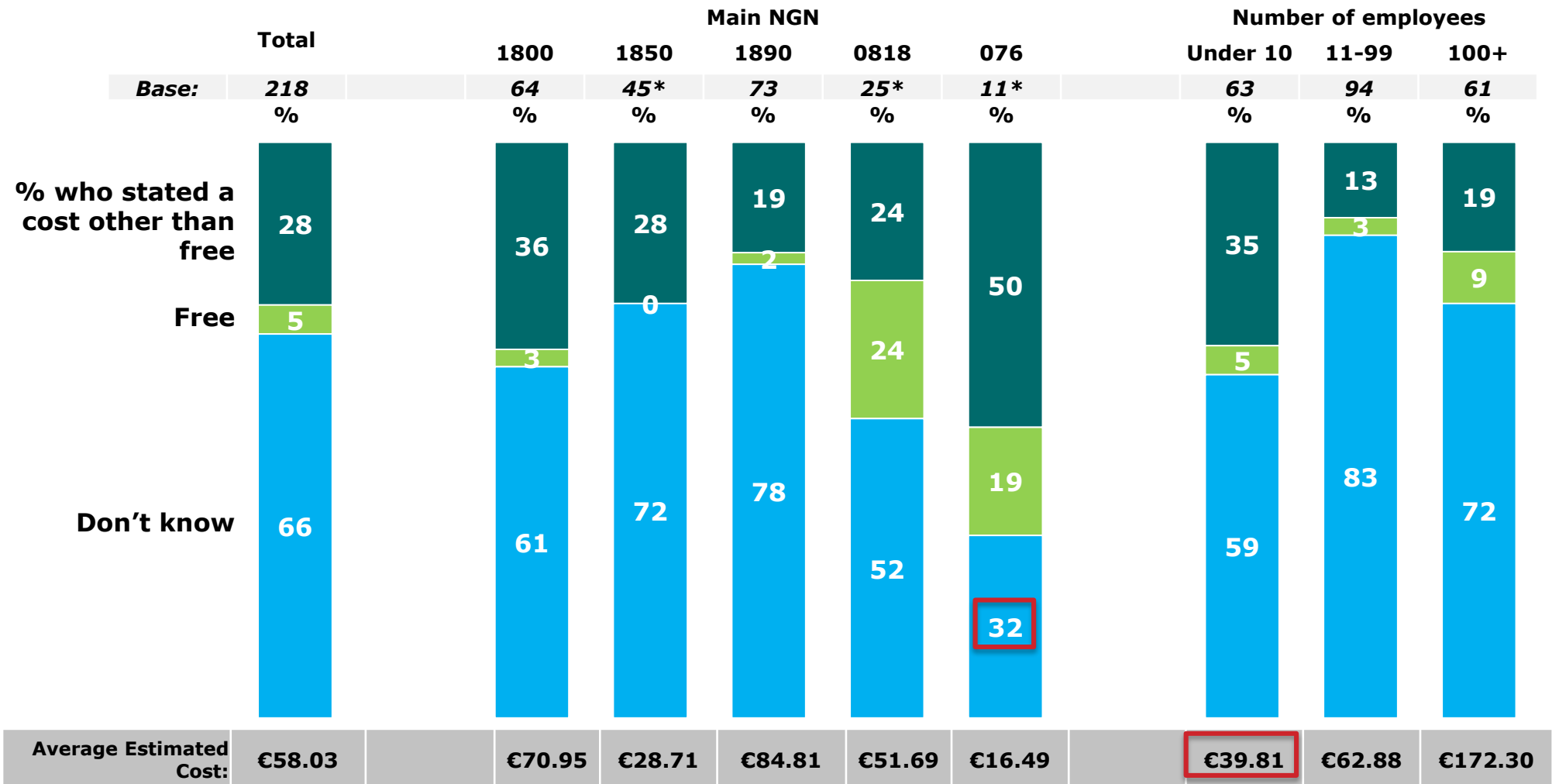
3 in 5 NGN users on a per minute call charging structure do not know how the per minute costs to receive calls from a landline, while 7 in 10 do not know the per minute costs to receive calls from a mobile. The average estimated per minute call cost for organisations to receive a call from a landline is €0.16 and €0.22 from a mobile.

* Caution small base size.

Estimated per month organisation cost for receiving NGN calls from landlines

Base: All currently use NGNs (218)

 = significantly lower vs total



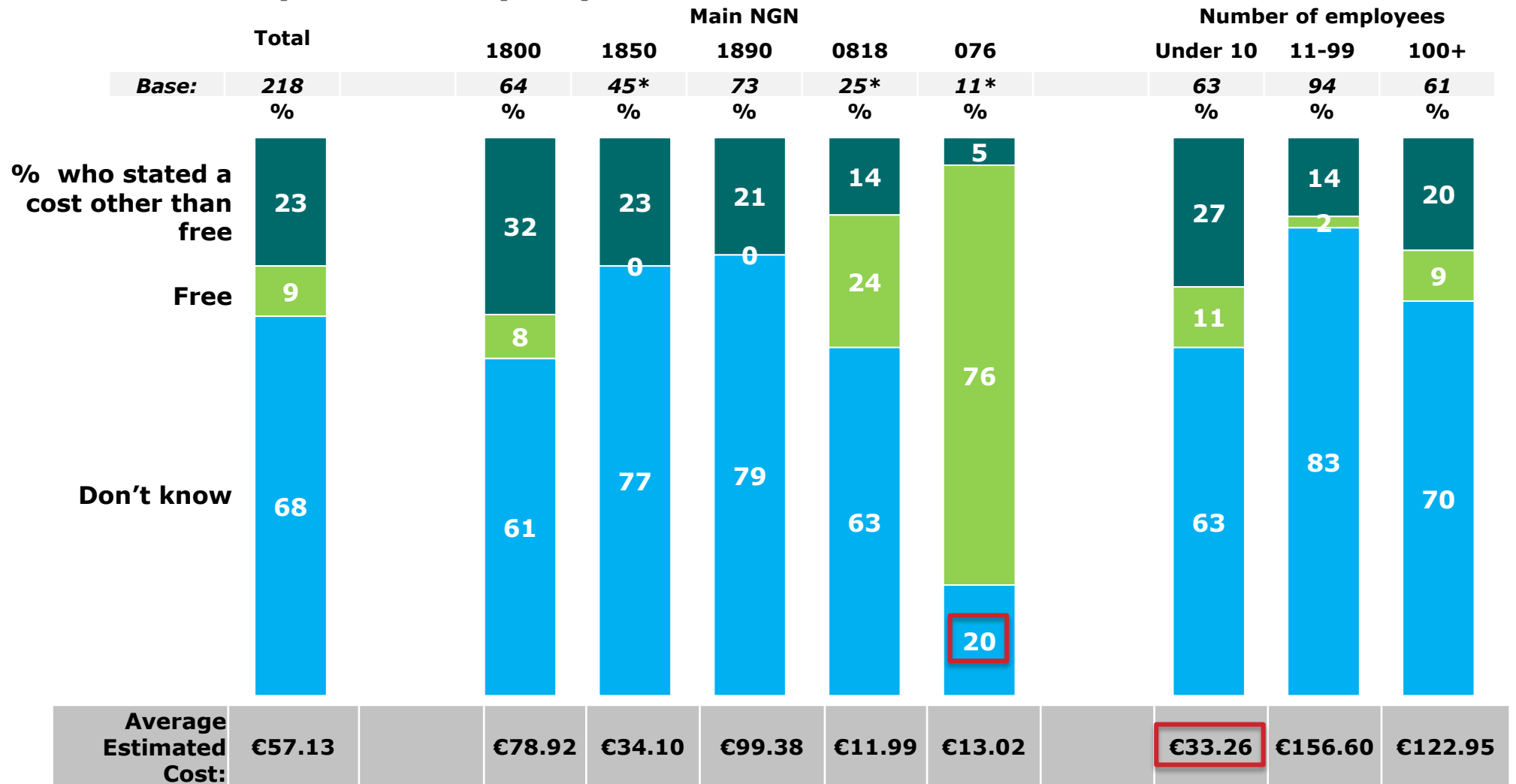
Two thirds of current NGN users were not able to estimate the per month cost of receiving NGN calls from landlines to the main NGN. Smaller organisations (under 10 employees) estimated a significantly lower average monthly cost.

* Caution small base size.

Estimated per month organisation cost for receiving NGN calls from mobile

Base: All currently use NGNs (218)

 = significantly lower vs total



More than two thirds of NGN users were not able to estimate the per month cost of receiving calls from mobiles to the main NGN. Again, smaller organisations (under 10 employees) estimated a significantly lower average monthly cost.

* Caution small base size.

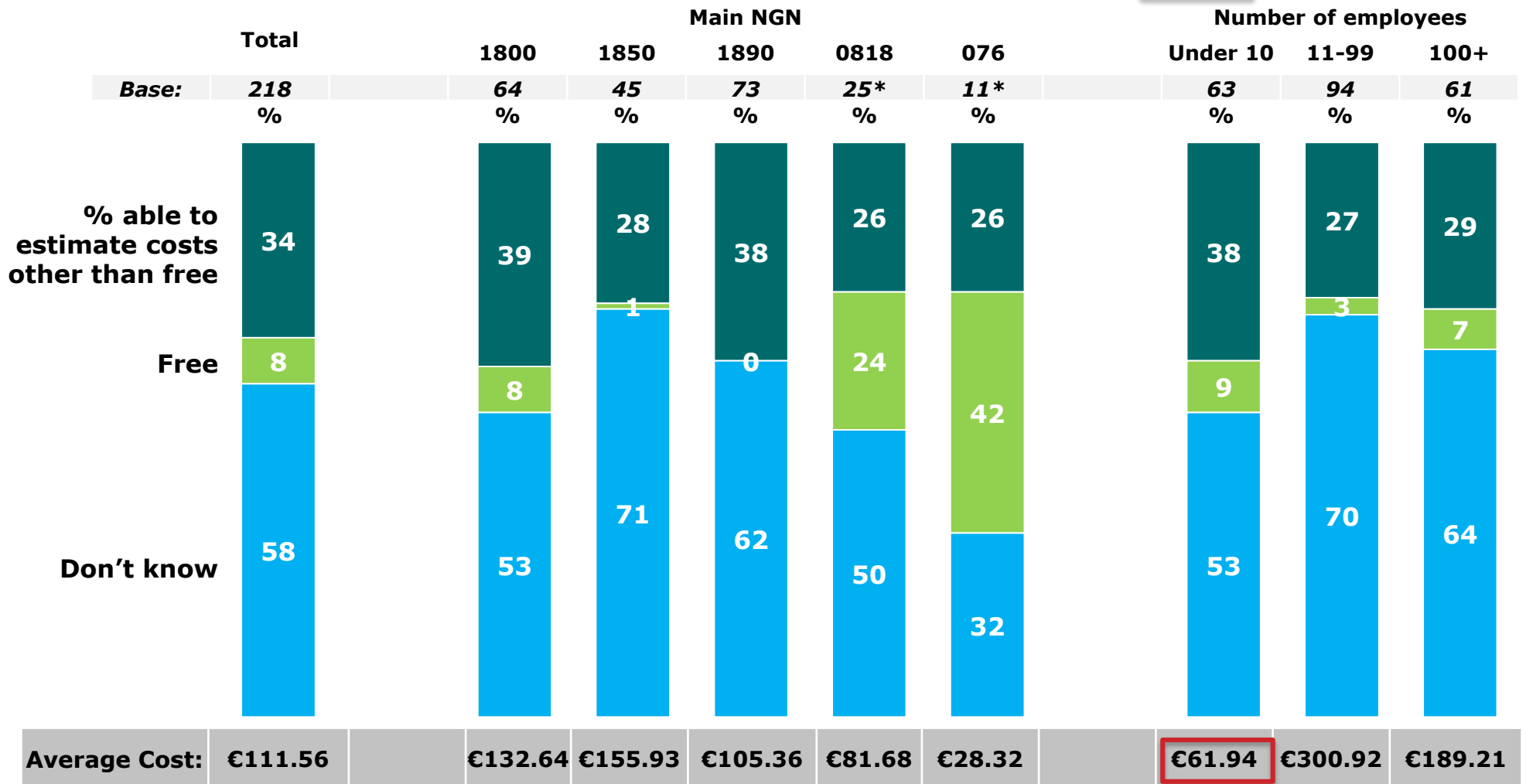


Q.36 And how much, in euros, on average, do you think it costs your organisation per month for **receiving** calls to your main NGN?

Estimated per month organisation cost for receiving NGN calls from landlines and mobiles

Base: All currently use NGNs (218)

€61.94 = significantly lower vs total



2 in 5 organisations claimed they were able to estimate the per month cost of receiving calls to the main NGN from landlines and mobiles (including those who said calls were free), while almost 3 in 5 could not. Smaller organisations (under 10 employees) estimated a significantly lower average monthly cost.

* Caution small base size.

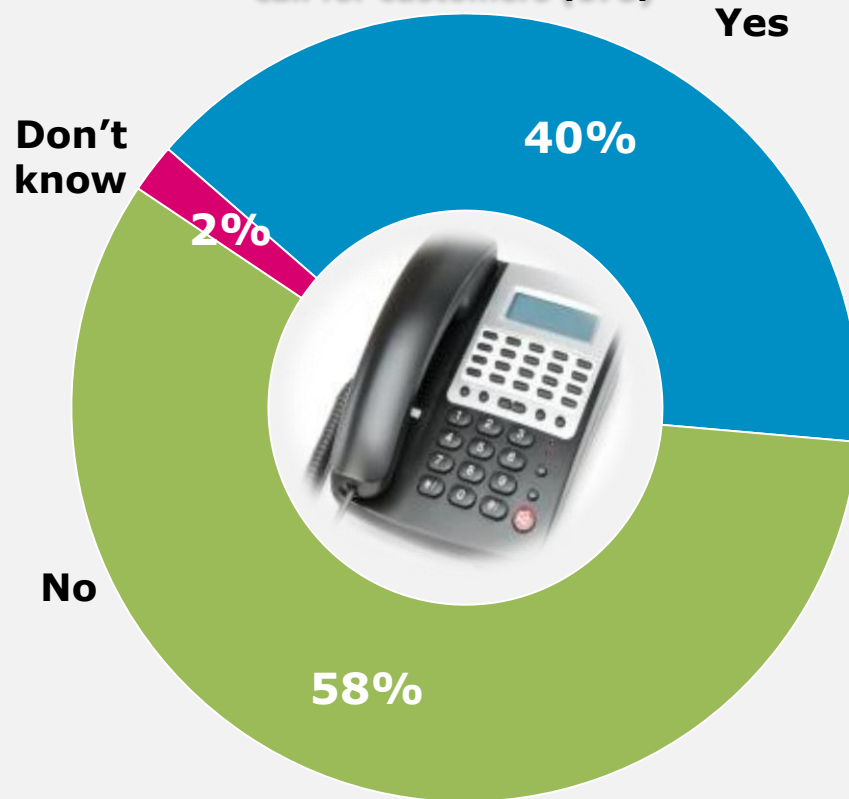


Q.36 And how much, in euros, on average, do you think it costs your organisation per month for **receiving** calls to your main NGN?

Incidence of organisations who would consider using NGNs in the future if customer and organisation costs were reduced

Would consider NGNs if customer costs reduced

Base: All who think NGNs are too expensive to call for customers (173)



Would consider NGNs if organisations costs reduced

Base: All who think NGNs are too expensive for the organisation to use (193)



2 in 5 organisations who think NGNs are too expensive for customers to use would consider using NGNs in the future if customer call costs reduced. A similar number (44%) of organisations who think that NGNs are too expensive for the organisation to use would consider using NGNs in the future if the organisation costs reduced.



Q.24 You said that you do not use Non-Geographic-Numbers because they are **too expensive for customers** to call, would you consider using Non-Geographic-Numbers in the future if the customer costs of calling these numbers reduced?

Q.25 You said that you do not use Non-Geographic-Numbers because they are **too expensive for the organisation** to use, would you consider using Non-Geographic-Numbers in the future if the organisation's costs of using these numbers reduced?



THANK YOU

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Appendices



Questionnaire



J.7152

**ComReg Business Non-Geographic-Numbers Questionnaire
Final Interview Versions
10th May**

Part A: Full Sample

DEMOGRAPHICS

Hello. My name is www.comreg Behaviour & Attitudes, the independent market research company based in Dublin. We are currently carrying out a survey on behalf of the Commission for Communications Regulation (ComReg) among Irish businesses regarding certain types of telephone numbers. The answers you give are very important in terms of informing ComReg's future work on these numbers.

May I speak to the person responsible for making decisions regarding the telephone numbers your organisation provides to its customers (including landline, mobile phone and Non Geographic Numbers)?

The study will take approximately 15- 20 minutes depending on your answers.

All responses given will be treated in aggregate and anonymous form.

A. What county is the company located?

B. Approximately how many employees does the company have?

DO NOT PROMPT _____ (specify number)

IF 'DON'T KNOW' NUMBER OF EMPLOYEES ASK

Would it be.....?

- 1-3 employees
- 4-9 employees
- 10-19
- 20-49
- 50 -100
- 101 - 150
- 151 - 200
- 201 - 250
- 250+ employees plus

C. What is your main business activity? DO NOT READ OUT BUT CODE TO PRECODES

Tech manufacturing (manufacture of machinery, computers, medical equipment, copiers, equipment, transport vehicles + equipment etc.).	1
All Other Manufacturing	2
Construction	3
Retail & Wholesale Trade	4
Hotels/restaurants/bars/leisure services	5
Transportation	6
Technology, IT & Communications	7
Services (incl. business services, real estate)	8

2



services)	
Financial services	9
Public/Government services	10
Other (specify)	11

AWARENESS AND USE OF NGNs

Interviewer explanation: Businesses and organisations, such as banks, utility companies, charities, often use certain types of telephone numbers other than ordinary landline (e.g. 01, 061) or mobile numbers, as contact numbers for services and helplines. These numbers are called Non-Geographic Numbers or NGNs as they are not linked to any specific location. They start with particular number prefixes to identify them.

We use the terms Non-Geographic Number and NGN interchangeably throughout this survey.

ASK ALL

Question 1

Are you aware of the following Non-Geographic Number prefixes?

READ OUT NGNs ONLY. DO NOT READ OUT "aware" or "not aware".

NGN	Aware	Not Aware
1800	1	2
1850	1	2
1890	1	2
0818	1	2
076	1	2

ASK ALL

Question 2

Does your organisation currently use any of the following numbers to provide services such as helplines, sales lines, enquiry and complaint lines or other such services?

READ OUT. MULTIPLE ANSWERS POSSIBLE.

ASK ALL

WHEN READING OUT OPTIONS FOR "PREVIOUSLY USED", EXCLUDE THOSE NUMBERS THAT ARE "CURRENTLY USED" AT Q2.

Question 2a |

3

Questionnaire



Has your **organisation**, previously used but no longer uses any of the following numbers to provide such services?

READ OUT. MULTIPLE ANSWERS POSSIBLE.

	Question 2	Question 2a	
Number	Currently use	Previously used	Never used
1800	1	2	3
1850	1	2	3
1890	1	2	3
0818	1	2	3
076	1	2	3
Landline number	1	2	3
Mobile number	1	2	3
None	1	2	3

ASK ALL CURRENTLY USING ANY NUMBERS FROM Question 2

Question 3

Aside from phone numbers, which other contact methods does your organisation use to provide services (for example email, social media and other forms of contact)?

DO NOT READ OUT. CODE TO PRECODE. MULTIPLE ANSWERS POSSIBLE.

Text-based service (e.g. SMS)	1
Email	2
Social Media	3
Online Form	4
Webchat	5
Letter	6
Other (specify _____)	7
None	8



Part B: QUESTIONS RELATED TO CURRENT USE OF NGNs

- ASK THIS SECTION FOR THOSE CURRENTLY USING NGNs AT Question 2

ASK THOSE CURRENTLY USING NGNs IN Question 2

Question 4

Who is the main provider of your Non-Geographic-Number(s) (ask for each number currently using at Q2)? Please also mention any additional NGN providers for each NGN if relevant.

Note to interviewers/scripters: For each NGN, record providers if more than one.

	Main NGN Provider	NGN Provider 2	NGN Provider 3
1800			
1850			
1890			
0818			
076			

Question 5

Does your organisation purchase all of its telephony services (including NGNs) as part of a single contract from the same provider?

Yes	1
No	2
Don't know	3

ASK FOR EACH NGN USED AT Question 2

Question 6

Thinking of the Non-Geographic-Number(s) currently provided by your **organisation**, please list the services that you provide over each NGN used [e.g. helplines, sales lines etc.]:

ONLY READ OUT NUMBER FOR EACH NGN CURRENTLY USED AT Q2]

Number	Service 1	Service 2	Service 3

Questionnaire



1800			
1850			
1890			
0818			
076			

Question 6a

Which type of Non-Geographic Number would you consider to be your main NGN? Your main NGN means the Non-Geographic-Number that is called the most.

Interviewer to record one main NGN only i.e. 1800, 1850, 1890, 0818 or 076

MAIN NGN	
----------	--

ASK THOSE USING 1800 NUMBERS AT Question 2

Question 7

What is your main reason for providing an 1800 number for certain services instead of using other Non-Geographic-Numbers?

ALLOW ONE OPTION ONLY. PLEASE READ OUT. CODE TO PRECODES. Rotate order

To provide customers with more memorable contact numbers	1
To offer single contact numbers	2
Using this Non-Geographic-Number best suits our brand/image	3
	4
To allow customers to access your organisation's services free of charge	
Other (specify _____)	5
Don't know (DO NOT READ OUT)	6

ASK FOR MAIN NGN AT Q6a (EXCEPT 1800 NUMBERS).

Question 8

What are the main reason(s) your organisation uses an [INSERT MAIN NGN FROM Q6a] number?

ROTATE ORDER OF STATEMENTS. PLEASE READ OUT. ALLOW MULTIPLE ANSWERS.

INTERVIEWER SAY: Please just say 'Yes' or 'No' to each reason I read out.



INTERVIEWER SELECT IF 'YES'

To provide memorable contact numbers	1
To offer single contact numbers to customers	2
To reduce the cost of calls for your organisation.	3
To reduce the cost of calls for your customers	4
Using this Non-Geographic-Number best suits our brand/image	5
So that your organisation can change address without changing number	6
To avoid showing where your organisation is based	7
The organisation has always used this number	8

ASK FOR MAIN NGN AT Q6a

Question 9

Thinking of the services provided on your main NGN, do you also provide a landline or mobile number for customers to access these services?

DO NOT READ OUT. CODE TO PRECODES

Yes - landline	1
Yes - mobile	2
No	3

ASK FOR THOSE WHO CODE 1 or 2 TO Question 9

Question 10

Why do you provide a Landline/Mobile number for customers to access this service?

DO NOT READ OUT. CODE TO PRECODES. ALLOW MULTIPLE ANSWERS.

To allow international callers to access our services.	1
To provide access to services that are located in specific geographic locations.	2
To provide a local presence	3
Because callers may have free calls to landline and/or mobile	4
To give customers an alternative option to calling our Non-Geographic-Number	5

Questionnaire



Any other reason (specify _____)	6
----------------------------------	---

ASK THOSE CURRENTLY USING NGNs AT Question 2

Question 11

If you were to use an alternative contact method instead of your **Main** NGN what would your preferred alternative be?

READ OUT. CODE TO PRECODE. ALLOW ONE ANSWER ONLY.

Landline number	1
Mobile number	2
Different NGN (specify _____)	3
email	4
Social media	5
On-line form	6
webchat	7
Text service (e.g. SMS)	8
Other (specify _____)	9

IF CODE 1-6 IN Question 11 ASK

Question 12

Why would you consider using [insert answer from Question11]?

DO NOT READ OUT. CODE TO PRECODES

Cost savings to the organisation	1
Cost savings to customers	2
Using this option would suit our brand/image	3
To provide a local presence	4
To enable customers to contact us/me directly	5
To provide customers with an alternative	6



option	
To use all contact methods available	7
Any other reason (specify _____)	8

ASK THOSE CURRENTLY USING NGNs AT Question 2

Question 13

Are there any Non-Geographic-Numbers (1 or more) your **organisation** would **not** consider using?

READ OUT ONLY NGNS NOT CURRENTLY USED AT Q2. ALLOW MULTIPLE ANSWERS.RECORD AS MANY NGNS AS MENTIONED.

1800	1
1850	2
1890	3
0818	4
076	5
None of these	6
Don't know	7

IF CODE 1-5 IN Q13 ASK FOR EACH NGN RECORDED.

Question 14

What are your reasons for not wishing to use that/those Non-Geographic-Numbers?

DO NOT READ OUT. CODE TO PRECODES. MULTIPLE ANSWERS POSSIBLE.

I have never heard of (INSERT AS APPROPRIATE) numbers	1
Too expensive for customers to call	2
Too expensive for my organisation	3
This NGN does not suit the organisation's image/brand	4
It is not as memorable as other Non-Geographic-Numbers	5
Other (specify _____)	6

ASK FOR EACH NGN CURRENTLY USED AT Q2

Question 15

Are you aware if calls made to [insert NGN currently used from Question 2] are included in the call package of free telephone minutes offered by **landline operators** to customers?

Questionnaire



ASK FOR EACH NGN CURRENTLY USED AT Q2

Question 15a

What about free telephone minutes offered by mobile operators to customers?

DO NOT READ OUT. CODE TO PRECODES.

	Q15	Q15a
Yes, they are included	1	1
No, they are not included	2	2
Don't Know	3	3

ASK THOSE WHO CODE NO OR DON'T KNOW AT Question 15

Question 16

If calls to the Non-Geographic-Numbers you offer are not included in bundled minutes for **landline callers** would you consider switching to a landline or mobile number that is included?

ASK THOSE WHO CODE NO OR DON'T KNOW AT Question 15a

Question 16a

If calls to the Non-Geographic-Numbers you offer are not included in bundled minutes for **mobile callers** would you consider switching to a landline or mobile number that is included?

DO NOT READ OUT. CODE TO PRECODES.

	Q16	Q16a
Yes	1	1
No	2	2
Don't Know	3	3



Part C: QUESTIONS RELATED TO PREVIOUS NGN USE

- DO NOT ASK THIS SECTION FOR THOSE WHO NEVER USED NGNS AT QUESTIONS 2/2a

PART C1 – FOR ORGANISATIONS THAT CURRENTLY USE AND PREVIOUSLY USED ANY NGNS AT QUESTION 2 AND 2a

ASK FOR EACH NGN PREVIOUSLY USED AT Question 2a

Question 17

You said that your organisation previously used [Insert NGN from Question 2a]. Why does your organisation no longer use this number?

INTERVIEWER NOTE: READ OUT. ALLOW MULTIPLE ANSWERS. ROTATE ORDER

Too expensive for customers	1
Not cost effective for the organisation	2
Decided to use a landline number instead	3
Decided to use a mobile number instead	4
Decided to use online methods instead	5
Decided to use a different Non-Geographic-Number	6
I no longer provide this service	7
Other (specify _____)	8

IF CODE 3 TO Question 17 ASK

Question 18

You said that you use a landline number instead of an NGN now. For what reason(s) do you do so?

IF CODE 4 TO Question 17 ASK

Question 18a

You said that you use a mobile number instead of an NGN now. For what reason(s) do you do so?

DO NOT READ OUT. CODE TO PRECODES. ALLOW MULTIPLE ANSWERS.

Questionnaire



	Q18	Q18a
This number is similarly suited for the service we provide for our customers	1	1
The organisation costs are similar to using an NGN	2	2
The organisation costs are less than those for an NGN	3	3
The cost to the caller is less than the cost of calling an NGN	4	4
This number is as easy to remember as an NGN	5	5
Other (specify _____)	6	6



IF CODE 6 TO Question 17 ASK

Question 19

You said that you use a different NGN now. For what reason(s) do you do so?

DO NOT READ OUT. CODE TO PRECODES. ALLOW MULTIPLE ANSWERS.

The new NGN is similarly suited for the service we provide for our customers	1
The organisation's costs for using the new NGN are similar to the organisation's costs for using the old NGN	2
The organisation's costs for using the new NGN are less than the organisation's costs for using the old NGN	3
The cost to the caller for using the new NGN is less than the cost of calling the old NGN	4
The new NGN is as easy to remember as the old NGN	5
Any other reason (specify _____)	6

Questionnaire



PART C2 – FOR ORGANISATIONS THAT PREVIOUSLY USED ANY NGNS AT QUESTION 2a AND DO NOT CURRENTLY USE ANY NGN AT QUESTION 2

ASK FOR EACH NGN PREVIOUSLY USED AT Question 2a

Question 20

Thinking of the Non-Geographic-Number(s) previously provided by your organisation, can you indicate the nature of services provided via these Non-Geographic-Numbers [e.g. helplines, sales lines, enquiry/complaint lines and other such services]?

Number	Service 1	Service 2	Service 3
1800			
1850			
1890			
0818			
076			

ASK SEPARATELY FOR EACH NGN PREVIOUSLY USED AT Question 2a

Question 21

You said that your organisation previously used (insert NGN as appropriate from Question 2a) number. Why does your organisation no longer use this number?

PLEASE READ OUT. CODE TO PRECODES. ALLOW MULTIPLE ANSWERS. ROTATE ORDER

Too expensive for customers	1
Not cost effective for the organisation	2
Decided to use a landline number instead	3
Decided to use a mobile number instead	4
My organisation no longer provides this service	5
Other (specify _____)	6

IF CODE 3 TO Question 21 ASK

Question 22

You said that you use a landline number instead of an NGN now. For what reason(s) do you do so?

IF CODE 4 TO Question 21 ASK

Question 22a



You said that you use a mobile number instead of an NGN now. For what reason(s) do you do so?

DO NOT READ OUT. CODE TO PRECODES. ALLOW MULTIPLE ANSWERS.

	Q22	Q22a
This number is similarly suited for the service we provide for our customers	1	1
The organisation's costs are similar to using an NGN	2	2
The organisation's costs are less than those for an NGN	3	3
The cost to the caller is less than the cost of calling an NGN	4	4
This number is as easy to remember as an	5	5
Any other reason (specify _____)	6	6

Questionnaire



PART D - ORGANISATIONS NOT USING ANY NGNs TO OFFER SERVICES

- ASK THIS SECTION FOR THOSE NEVER USING ANY NGNs AT QUESTION 2 AND 2a

- DO NOT ASK THIS SECTION FOR THOSE CURRENTLY USING NGNs (Q2) OR WHO PREVIOUSLY USED NGNs AT QUESTION 2a

ASK THOSE AWARE OF NGNS FROM Question 1

Question 23

Why does your organisation not use any Non-Geographic-Numbers to offer services?

PLEASE READ OUT. CODE TO PRECODE, ALLOW MULTIPLE ANSWERS. ROTATE ORDER

The organisation uses a landline or mobile number instead of Non-Geographic-Numbers	1
I don't understand how Non-Geographic-Numbers work	2
Non-Geographic-Numbers are too expensive to call for customers	3
Non-Geographic-Numbers are too expensive for the organisation to use	4
The organisation is not big enough/have substantial turnover to warrant a non-geographic-number	5
Don't feel it is necessary for my organisation	6
We want to be seen to offer a local presence	7
Any other reason (specify _____)	8

IF CODE 3 TO Question 23 ASK

Question 24

You said that you do not use Non-Geographic-Numbers because they are too expensive for customers to call, would you consider using Non-Geographic-Numbers in the future if the customer costs of calling these numbers reduced?

DO NOT READ OUT. CODE TO PRECODES,

Yes	1
No	2
Don't know	3

IF CODE 4 TO Question 23 ASK

Question 25



You said that you do not use Non-Geographic-Numbers because they are too expensive for the organisation to use, would you consider using Non-Geographic-Numbers in the future if the organisation's costs of using these numbers reduced?

DO NOT READ OUT. CODE TO PRECODES,

Yes	1
No	2
Don't know	3

ASK THOSE USING LANDLINE OR MOBILE NUMBERS FROM Question 2 AND AWARE OF NGNS FROM Question 1

Question 26

Thinking about your organisation's use of landline or mobile numbers as contact numbers, which of the following statements do you agree or disagree with, on a five point scale where 5 = Strongly Agree with and 1 = Strongly Disagree?

READ OUT. ROTATE ORDER. DO NOT REPEAT SCALE AFTER EACH STATEMENT - ONLY REPEAT SCALE WHEN ASKED.

	Strongly Agree	Agree slightly	Neither agree nor disagree	Slightly disagree	Strongly Disagree	Don't know
Landline and mobile numbers are as easy to remember as NGNs	5	4	3	2	1	0
It is more cost effective for the organisation to use a [landline/mobile] number than an NGN.	5	4	3	2	1	0
It is more cost effective for customers to use a [landline/mobile] number than an NGN.	5	4	3	2	1	0

Questionnaire



Part E – COSTS

Interviewer explain: I would now like you to think about customers calling telephone numbers including NGNs. The following questions relate only to costs to customers of making calls outside of those minutes included in their call package allowance

- If respondent wants to get bill for cost questions, reassure them that there is no need and we're just looking for their understanding/perceptions.
- If respondent notes that different costs apply, interviewer to acknowledge and indicate that we're looking for typical costs.

ASK ALL AWARE OF NGNs AT Question 1

Question 27

Of the Non-Geographic-Numbers 1800, 1850, 1890, 0818 and 076, which ~~NGN~~ NGNs do you associate with each of the following statements?

READ OUT STATEMENTS ONLY. ROTATE ORDER. CODE TO PRECODES. ALLOW MULTIPLE ANSWERS.

STATEMENTS	1800	1850	1890	0818	076	None of these	Don't know
Free to call from mobile	1	2	3	4	5	6	7
Free to call from landline	1	2	3	4	5	6	7
Calls are charged per call	1	2	3	4	5	6	7
Calls are charged per minute	1	2	3	4	5	6	7

ASK ALL

Question 28

Do you think you would be able to state the typical costs for a customer of calling the following types of numbers from a landline?

INTERVIEWER SAY: Please just say 'Yes' or 'No' to each option I read out.

INTERVIEWER SELECT IF 'YES'

SCRIPT NOTE:

ASK ALL THE COSTS OF CALLING LANDLINE NUMBERS AND MOBILE NUMBERS.

FOR 1800, 1850, 1890, 0818 AND 076 ONLY ASK THE COSTS OF CALLING EACH NGN AWARE OF FROM Q1



READ OUT.

	Yes, I know	No, I don't know
Landline	1	2
Mobile	1	2
1800	1	2
1850	1	2
1890	1	2
0818	1	2
076	1	2

Question 28a

How about the typical costs for a customer calling the following types of numbers from a mobile?

INTERVIEWER SAY: Please just say 'Yes' or 'No' to each option I read out.

INTERVIEWER SELECT IF 'YES'

SCRIPT NOTE:

ASK ALL THE COSTS OF CALLING LANDLINE NUMBERS AND MOBILE NUMBERS.

FOR 1800, 1850, 1890, 0818 AND 076 ONLY ASK THE COSTS OF CALLING EACH NGN AWARE OF FROM Q1

	Yes, I know	No, I don't know
Landline	1	2
Mobile	1	2
1800	1	2
1850	1	2
1890	1	2
0818	1	2
076	1	2

Scripter Note: Question 29 should be asked for each type of number that the respondent answers "Yes, I know" to in Q28 and/or 28a.

Question 29

How much, in euro cents, do you think it typically costs a customer per minute/per call to call a [ask for each type of number coded Yes at Q28 and 28a] during business hours on each of the following?

Questionnaire



[Scripter note: For those that code yes at Q28 ask for costs of calling from landline only.

For those that code yes at Q28a ask for costs of calling from prepay and billpay mobile.

For those that code yes to Q28 and 28a ask for costs of calling from landline, prepay and billpay mobile]

	Answer in euro cents	Free	Don't know
From a Landline			
From a Prepay Mobile			
From a Billpay Mobile			

ASK THOSE CURRENTLY USING NGNs AT Question 2

Question 30

Does your organisation do anything to provide guidance to customers on the cost of calling your Non-Geographic-Number(s)?

DO NOT READ OUT. CODE TO PRECODES.

Yes	1
No	2
Don't know	3

IF YES TO Question 30 ASK

Question 31

How do you provide this guidance? **DO NOT READ OUT BUT CODE TO PRECODES**

Advertise/indicate the price on company brochures	1
Advertise/indicate the price on website, email or social media	2
State the cost on a recorded telephone message	3
Indicate in the organisation's advertisements that the price may vary depending on the operator	4
State the cost during the phone call	5
Other (specify _____)	6

Question 32



Does your organisation face difficulties informing your customers of the exact cost of calling your Non-Geographic-Number(s)? For example, due to different prices set by different networks/providers?

DO NOT READ OUT.

Yes (specify _____)	1
No	2
Don't know	3

ASK THOSE CURRENTLY USING NGNs AT Question 2

INTERVIEWER, EXPLAIN: Now please answer the following questions thinking of your organisation's experience of using NGNs.

Question 33

To what extent do you agree or disagree with the following statements, on a 5 point scale where 5= agree strongly and 1 = strongly disagree?

INTERVIEWER IF NECESSARY **CLARIFY:** This is just in relation to your organisations experience of NGNs.

READ OUT. ROTATE ORDER. DO NOT REPEAT SCALE AFTER EACH STATEMENT – ONLY REPEAT SCALE WHEN ASKED.

	Strongly Agree	Agree slightly	Neither agree nor disagree	Slightly disagree	Strongly Disagree
NGN costs to your organisation are an important factor in choosing your NGN provider	5	4	3	2	1
Customers choose whether or not to make a call to an NGN depending on the cost of the call	5	4	3	2	1
The cost to your customers of calling NGNs influences your organisation's choice of NGN	5	4	3	2	1
It is important that consumers are aware of the cost of calling NGNs	5	4	3	2	1

ASK THOSE CURRENTLY USING NGNs AT Question 2

Questionnaire



Question 34

You indicated that your main NGN is [insert main NGN from Question 6a], what is the charging structure to your organisation for receiving calls to this Non-Geographic-Number?

READ OUT. ROTATE ORDER.

Fixed monthly cost (specify details – including NGNs are bundled with other services, linked to volume of NGN calls etc.)	1
Cost per call	2
Cost per minute	3
Bespoke offer (specify details – including any other services provided by your NGN provider within your offer)	4
Other (specify _____)	5
Don't know (Do not read out)	0
Refused to answer (Do not read out)	

IF CODE 2 TO Question 34 ASK

Question 35

How much, in euro cents, do you think it costs your organisation per call to receive calls to your main NGN?

READ OUT OPTIONS ONLY.

OPTIONS	Answer in euro cents	Free	Don't know
To receive calls from Landline	<input type="text"/>		
To receive calls from Mobile	<input type="text"/>		

IF CODE 3 TO Question 34 ASK

Question 35a

How much, in euro cents, do you think it costs your organisation per minute to receive calls to your main NGN?

READ OUT OPTIONS ONLY.



OPTIONS	Answer in euro cents	Free	Don't know
To receive calls from Landline	<input type="text"/>		
To receive calls from Mobile	<input type="text"/>		

Question 36

And how much, in euros, on average, do you think it costs your organisation per month for receiving calls to your main NGN?

READ OUT OPTIONS ONLY.

OPTIONS	Answer in euro	Free	Don't know
To receive calls from Landline	<input type="text"/>		
To receive calls from Mobile	<input type="text"/>		
To receive calls from both	<input type="text"/>		

Just before I finish could I ask you a few questions for classification purposes? The response that you give will be used in an aggregate form and will not be linked to you.

Would you be willing to participate in other studies about a variety of other subject matters?

Yes
No

And would you be willing to participate in the future in online research via email?

Yes
No

IF YES

Can I take your email address in that case?

Provide email address (interviewer take special care to note correctly)

That's the end of the study, thank you for your time and help. Could I have your full name please - just in case my supervisor needs to check my work?

I would like to assure you that this interview has been conducted in accordance with the Market Research Society's code of conduct.

In case you missed it earlier my name is _____ and I am calling from Behaviour and Attitudes in Dublin.

Awareness of NGNs x demographics

Base: All organisations (881)

= Significantly higher vs total
 = Significantly lower vs total

	Total	Number of Employees				Use NGNs		Region				Sector							
		Under 10	11 to 40	41 to 99	100+	Yes	No	Dublin	Leinster	Munster	Conn/Uls	Manufacturing / construction	Wholesale and retail	Accommodation / food service	Financial and insurance	Education	Human health / social work	Other service activities	Others
Base:	881	501	235	61	84	218	663	281	200	287	113	83	90	67	46*	92	79	126	298
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	96	96	98	95	99	99	95	96	96	96	96	100	93	90	100	92	92	97	98
1850	96	96	97	92	96	97	96	94	99	94	97	100	96	95	100	97	90	95	96
1890	88	88	90	91	97	98	87	94	86	88	82	90	94	76	86	84	85	83	93
0818	54	53	60	63	70	77	52	58	56	53	49	50	53	38	52	47	40	60	63
076	28	28	30	35	35	43	27	24	26	33	31	23	24	18	45	17	29	35	31
- ANY NGN	99	99	99	96	99	100	98	98	99	98	99	100	97	97	100	99	95	98	100
None	1	1	1	4	1	-	2	2	1	2	1	-	3	3	0	1	5	2	-



* Caution small base size.
 ** Multiple responses allowed.



Q.1 Are you aware of the following Non-Geographic Number prefixes?

Current use of NGNs x demographics

Base: All organisations (881)



 = Significantly higher vs total
 = Significantly lower vs total

	Total	Number of Employees				Region				Sector							
		Under 10 employees	11 to 40 employees	41 to 99 employees	100 + employees	Dublin	Leinster	Munster	Conn/Uls	Manufacturing / construction	Wholesale and retail	Accommodation / food service	Financial and insurance	Education	Human health / social work	Other service activities	Others
Base:	881	501	235	61	84	281	200	287	113	83	90	67	46*	92	79	126	298
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Landline Number	87	87	93	82	89	86	90	88	85	91	95	88	86	86	83	86	85
Mobile Number	67	69	52	53	52	63	69	67	69	82	65	60	54	54	47	66	75
ANY NGN	10	7	19	32	58	14	8	7	9	8	7	3	14	5	14	5	15
1800	4	3	8	12	19	7	3	2	3	3	1	1	2	1	7	1	6
1890	4	2	8	17	35	4	4	4	4	5	0	1	7	2	7	4	5
1850	3	2	4	11	25	4	3	2	2	3	3	1	1	1	4	2	3
0818	1	1	2	5	6	2	1	1	1	1	2	0	7	-	-	-	2
076	1	0	1	-	8	1	0	1	1	1	0	-	0	0	1	0	1
None of these	4	5	3	1	1	3	6	5	5	4	2	7	8	11	8	2	3



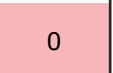

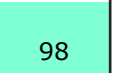
* Caution small base size.
 ** Multiple responses allowed.



Previously used NGNs but no longer use x demographics

 = Significantly higher vs total
 = Significantly lower vs total

Base: All organisations (881)

	Total	Number of Employees				Region				Sector							
		Under 10 employees	11 to 40 employees	41 to 99 employees	100+ employees	Dublin	Leinster	Munster	Conn/Uls	Manufacturing / construction	Wholesale and retail	Accommodation / food service	Financial and insurance	Education	Human health / social work	Other service activities	Others
Base:	881	501	235	61	84	281	200	287	113	83	90	67	46*	92	79	126	298
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
- ANY NGN	3	 2	4	2	18	 4	4	3	 0	3	3	-	4	4	1	3	3
Landline Number	2	2	1	3	6	3	2	2	2	2	-	4	5	2	0	3	2
1800	1	1	2	-	9	1	2	2	-	2	1	-	4	3	1	1	1
1850	1	1	1	2	3	1	2	-	-	-	2	-	-	2	0	1	1
1890	1	0	1	1	3	2	0	0	-	0	-	-	0	1	-	2	1
Mobile Number	1	1	3	1	0	0	1	4	-	0	2	2	-	2	2	2	1
0818	0	0	-	-	0	0	1	0	-	-	-	-	-	1	-	1	0
076	0	0	-	-	5	0	0	0	0	1	-	-	-	-	-	-	1
None of these/Did not previously use	94	95	93	94	 77	94	94	91	 98	95	95	94	91	92	97	92	94

* Caution small base size.
** Multiple responses allowed.

Never used NGNs number x demographics

Base: All organisations (881)



■ = Significantly higher vs total
■ = Significantly lower vs total

	Total	Number of Employees				Region				Sector							
		Under 10	11 to 40	41 to 99	100+	Dublin	Leinster	Munster	Conn/ Uls	Manufacturing / Construction	Wholesale and retail	Accommodation / food service	Financial and insurance	Education	Human health / social work	Other service activities	Others
Base:	881	501	235	61	84	281	200	287	113	83	90	67	46*	92	79	126	298
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
- ANY NGN	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
076	99	99	99	100	87	99	99	99	99	98	100	100	100	100	99	100	98
0818	98	99	98	95	94	98	98	98	99	99	98	100	93	99	100	99	97
1850	96	98	95	87	72	95	95	98	98	97	95	99	99	96	95	98	95
1800	95	96	90	88	73	93	95	97	97	95	97	99	94	96	92	98	93
1890	95	97	91	83	62	95	96	96	96	95	100	99	93	97	93	95	94
Mobile	32	30	45	46	48	37	30	29	31	18	34	38	46	44	51	32	25
Landline	11	11	6	14	6	11	8	10	13	7	5	8	9	12	16	11	13

* Caution small base size.
 ** Multiple responses allowed.



Other contact methods organisation uses to provide services x demographics

 = Significantly higher vs total
 = Significantly lower vs total

Base: All organisations currently providing any NGN, landline or mobile number to customers to access services (851)

	Total	Number of Employees				Region				Sector							
		Under 10	11 to 40	41 to 99	100+	Dublin	Leinster	Munster	Conn/Uls	Manufacturing / Construction	Wholesale and retail	Accommodation / food service	Financial and insurance	Education	Human health / social work	Other service activities	Others
Base:	851	478	230	60	83	274	192	276	109	81	88	62	43*	86	76	124	291
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Email	91	91	93	97	97	95	93	84	95	93	89	91	100	95	89	77	97
Social Media	46	45	50	43	68	43	50	44	46	32	51	60	30	30	55	45	48
Text-based service (e.g. SMS)	10	10	14	2	14	12	10	11	6	3	7	8	6	32	22	7	8
Letter	7	6	10	15	7	7	4	5	10	3	5	6	14	8	15	6	5
Online Form	7	6	9	18	16	10	6	6	7	6	4	7	2	6	17	7	8
Webchat	3	2	2	3	10	5	1	2	2	-	1	-	1	2	1	4	5
Other	16	15	27	31	24	12	16	16	24	16	18	22	23	13	16	11	17
None of these	5	5	2	1	1	2	6	8	2	4	9	2	-	4	5	11	1

* Caution small base size.
 ** Multiple responses allowed.



Main NGN used x demographics

Base: All currently use NGNs (218)



= Significantly higher vs total
 = Significantly lower vs total

	Total	Region				Number		
		Dublin	Leinster	Munster	Conn/Uls	Under 10 employees	11-99	100+
Base:	218	110	46*	42*	20*	63	94	61
	%	%	%	%	%	%	%	%
1800	30	40	20	16	31	33	34	15
1850	20	21	24	19	13	20	18	24
1890	33	20	51	42	36	30	35	43
0818	12	14	4	13	12	13	11	8
076	5	4	1	10	7	5	3	9

**Caution small base size.*



Main reasons for using a NGN other than 1800

 = Significantly higher vs total
 = Significantly lower vs total

Base: All organisations where main NGN is not an 1800 number (154)

	Total	Main NGN				Number of employees		
		1850	1890	0818	076	Under 10 employees	11-99	100+
Base:	154	45*	73	25*	11*	43*	63	48*
	%	%	%	%	%	%	%	%
To reduce the cost of calls for your customers	62	70	69	45	28	58	64	73
To provide memorable contact numbers	59	66	58	70	14	54	61	70
To offer single contact numbers to customers	59	56	61	58	61	50	64	80
The organisation has always used this number	53	71	54	30	38	56	47	51
Using this Non-Geographic Number best suits our brand or image	47	54	38	59	46	50	48	37
To reduce the cost of calls for your organisation	46	41	49	47	45	43	53	49
So that your organisation can change address without changing number	41	44	42	34	31	46	28	37
To avoid showing where your organisation is based.	11	5	7	26	28	13	7	9
None of these	4	1	3	1	26	4	4	2

* Caution small base size.

** Multiple responses allowed.

Reasons why organisation does not use NGNs to offer services x demographics

Base: All never used NGNs (644)



= Significantly higher vs total
 = Significantly lower vs total

	Total	Region				Number of employees			What is your main organisation activity?								NGN AWARENESS					
		Dublin	Leinster	Munster	Conn/Uls	Under 10	11-99	100+	Manufacturing / construction	Wholesale and retail	Accommodation / food service	Financial and insurance	Education	Human health / social work	Other services	Others	ANY	1800	1850	1890	0818	076
Base:	644	160	150	241	93	430	197	17*	64	73	62	28	82	56	102	177	634	618	617	567	343	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Don't feel it is necessary for my organisation	82	84	86	78	79	82	78	49	81	72	74	89	86	76	82	86	83	83	83	83	86	89
The organisation uses a landline or mobile number instead of Non-Geographic Numbers	75	82	75	74	68	76	72	72	71	78	76	91	64	63	81	76	77	77	77	77	79	77
The organisation is not big enough/have substantial turnover to warrant a non-geographic-number	70	74	62	73	69	71	59	16	68	75	70	72	59	65	68	73	71	71	71	72	72	72
We want to be seen to offer a local presence	49	45	51	49	54	50	46	35	49	56	58	72	33	35	59	43	50	50	50	49	52	50
Non-Geographic Numbers are too expensive for the organisation to use	30	28	30	33	26	30	26	16	28	27	43	33	28	22	28	30	30	30	30	28	29	30
Non-Geographic Numbers are too expensive to call for customers	28	26	29	31	25	29	22	8	24	30	39	33	24	21	29	27	28	28	28	28	32	28
I don't understand how Non-Geographic Numbers work	27	24	27	30	26	27	25	8	28	26	52	19	22	21	29	22	27	27	27	26	22	20
Any other reason	6	4	5	8	8	6	7	37	16	3	11	2	3	7	3	7	6	7	7	7	8	6

* Caution small base size.
 ** Multiple responses allowed.



Which NGN organisation associates with... Free to call from mobile x demographics

 = Significantly higher vs total
 = Significantly lower vs total

Base: All aware of any NGN (870)

	Total	Region				Use NGNs		Main NGN					Number of Employees				Sector							
		Dublin	Lein-ster	Mun-ster	Conn-uls	Yes	No	1800	1850	1890	0818	076	Under 10	11 to 40	41 to 99	100+	Manufaturing / construction	Wholesale and retail	Accommodation / food service	Financial and insurance	Education	Human health / social work	Other service activities	Others
Base:	870	278	199	281	112	218	652	64	45*	73	25*	11*	494	233	60	83	83	88	66	45*	90	76	124	298
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	27	33	25	24	24	40	25	43	42	34	49	34	26	33	31	45	19	38	13	30	19	34	31	27
1850	5	6	6	6	3	6	5	8	11	1	1	22	5	6	7	1	3	9	8	1	6	1	5	5
1890	4	3	4	5	2	5	3	5	-	7	2	22	3	6	7	10	4	6	7	9	5	-	1	2
0818	2	2	2	4	1	3	2	5	-	0	2	22	2	4	3	0	-	2	2	1	6	8	1	2
076	2	2	0	4	3	4	2	6	-	4	-	24	2	5	5	3	0	-	2	1	1	-	3	4
None of these	31	25	35	28	40	26	32	16	26	33	22	42	32	24	19	32	41	21	36	52	23	26	31	31
Don't Know	35	36	33	37	32	27	36	38	21	23	28	-	35	35	42	17	36	26	41	19	51	36	32	36

* Caution small base size.
** Multiple responses allowed.



Which NGN organisation associates with... Free to call from landline x demographics

= Significantly higher vs total
 = Significantly lower vs total



Base: All aware of any NGN (870)

	Total	Region				Use NGNs		Main NGN					Number of Employees				Sector							
		Dublin	Lein-ster	Mun-ster	Conn/uls	Yes	No	1800	1850	1890	0818	076	Under 10	11 to 40	41 to 99	100+	Manufaturing / construction	Wholesale and retail	Accommodation / food service	Financial and insurance	Education	Human health / social work	Other service activities	Others
<i>Base:</i>	870	278	199	281	112	218	652	64	45*	73	25*	11*	494	233	60	83	83	88	66	45*	90	76	124	298
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	47	55	44	44	44	66	45	71	71	57	64	72	47	51	51	60	51	51	33	49	38	56	41	52
1850	12	14	14	11	8	8	13	6	19	4	2	22	13	12	5	4	7	13	25	15	8	16	17	8
1890	10	8	13	10	6	8	10	4	7	10	3	22	10	11	2	11	12	15	12	27	8	11	9	5
0818	3	3	3	2	3	6	2	4	5	3	9	22	3	3	1	2	3	4	3	1	-	1	3	3
076	2	3	2	3	1	5	2	4	3	7	-	24	2	5	2	1	1	1	2	1	2	2	2	4
None of these	19	15	20	15	29	10	20	6	7	14	12	4	19	15	17	24	17	11	22	24	20	10	24	19
Don't Know	23	20	27	29	18	18	24	22	16	20	17	-	24	24	29	13	24	25	30	17	33	25	21	20

* Caution small base size.
 ** Multiple responses allowed.



Which NGN organisation associates with... Calls are charged per call x demographics

 = Significantly higher vs total
 = Significantly lower vs total



Base: All aware of any NGN (870)

	Total	Region				Use NGNs		Main NGN					Number of Employees				Sector							
		Dublin	Lein-ster	Mun-ster	Conn/uls	Yes	No	1800	1850	1890	0818	076	Under 10	11 to 40	41 to 99	100+	Manufa-cturing / constru-ction	Whol esale and retail	Accomm-odation / food service	Financi-al and insur-ance	Educat-ion	Human health / social work	Other service activities	Others
<i>Base:</i>	870	278	199	281	112	218	652	64	45*	73	25*	11*	494	233	60	83	83	88	66	45*	90	76	124	298
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	18	15	18	16	25	7	19	14	3	5	2	-	19	18	9	11	27	24	14	26	20	11	18	14
1850	33	33	30	31	39	34	33	43	29	27	34	40	33	30	34	36	38	36	22	42	28	29	25	37
1890	29	28	36	25	30	43	28	38	32	56	45	27	29	30	33	44	30	30	20	46	34	28	23	31
0818	18	19	20	14	19	26	17	28	22	27	24	25	18	20	20	19	17	23	12	15	21	11	25	16
076	18	17	19	15	20	19	17	23	20	20	4	27	18	16	25	18	17	18	17	30	18	17	20	15
None of these	11	9	9	14	11	13	10	9	7	16	12	36	11	7	14	18	10	9	10	20	7	8	11	12
Don't Know	35	35	36	37	33	28	36	37	40	19	20	19	36	38	29	17	33	27	50	19	51	43	37	31

* Caution small base size.
** Multiple responses allowed.



Which NGN organisation associates with... Calls are charged per minute x demographics

 = Significantly higher vs total
 = Significantly lower vs total

Base: All aware of any NGN (870)

	Total	Region				Use NGNs		Main NGN					Number of Employees				Sector							
		Dublin	Leinster	Munster	Conn/uls	Yes	No	1800	185*0	1890	0818	076	Under 10	11 to 40	41 to 99	100+	Manufacturing / construction	Wholesale and retail	Accommodation / food service	Financial and insurance	Education	Human health / social work	Other service activities	Others
<i>UNWTD</i>	870	278	199	281	112	218	652	64	45*	73	25*	11*	494	233	60	83	83	88	66	45*	90	76	124	298
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	19	14	20	21	22	15	19	21	10	9	17	30	18	15	19	35	19	28	21	13	25	20	16	15
1850	30	29	29	31	33	36	30	43	29	34	23	69	29	31	45	53	31	36	20	29	30	37	15	37
1890	31	33	35	28	29	40	30	48	28	37	45	53	30	34	34	51	38	32	30	32	33	29	24	32
0818	21	21	22	19	23	33	19	41	33	24	37	38	20	19	28	42	21	22	18	19	19	24	18	23
076	20	19	19	21	20	33	18	48	32	21	24	43	19	16	25	36	18	14	12	23	21	23	18	23
None of these	9	10	7	7	11	10	9	8	5	9	20	23	9	6	7	4	7	8	7	15	5	6	9	10
Don't Know	39	39	39	41	39	24	41	18	29	35	12	-	41	34	35	15	32	27	52	41	52	39	48	35

* Caution small base size.
** Multiple responses allowed.



Awareness of NGN call costs from landlines x demographics

Base: All aware of specific number

= Significantly higher vs total
 = Significantly lower vs total

		Total	Number of Employees				Use NGNs		Region				Main NGN					Sector							
			Under 10	11 to 40	41 to 99	100+	Yes	No	Dublin	Leinster	Munster	Conn/Uls	1800	1850	1890	0818	076	Manufacturing / construction	Wholesale and retail	Accommodation / food service	Financial and insurance	Education	Human health / social work	Other service activities	Others
	Base:	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	853	30	29	33	41	57	51	28	36	28	28	27	57	60	50	40	18	24	30	33	22	22	34	26	36
1850	849	20	20	18	20	40	35	19	23	21	20	16	32	66	28	22	18	19	23	28	17	11	21	17	22
1890	796	17	16	20	16	38	30	15	17	16	18	16	29	27	37	21	14	16	16	29	32	9	16	9	19
0818	524	13	12	13	12	29	22	12	13	12	10	20	14	14	28	33	17	23	23	8	18	13	2	9	12
076	277	9	9	13	9	26	15	8	7	11	10	10	13	7	25	4	18	11	21	28	-	3	3	1	13
Landline	881	36	35	41	35	47	43	35	35	35	40	31	33	52	49	44	21	33	30	29	41	39	36	35	38
Mobile	881	33	32	34	32	49	41	32	29	36	32	34	41	50	45	21	27	37	28	31	44	30	27	36	32



Awareness of NGN call costs from mobiles x demographics

= Significantly higher vs total
 = Significantly lower vs total

Base: All aware of specific number

		Total	Number of Employees				Use NGNs		Region				Main NGN					Sector							
			Under 10	11 to 40	41 to 99	100+	Yes	No	Dublin	Leinster	Munster	Conn/Uls	1800	1850	1890	0818	076	Manufacturing / construction	Wholesale and retail	Accommodation / food service	Financial and insurance	Education	Human health / social work	Other service activities	Others
	Base:	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1800	853	21	20	19	28	52	39	19	24	22	18	20	40	37	39	46	21	16	20	15	11	16	28	23	25
1850	849	14	14	12	14	26	20	14	16	15	12	13	17	31	14	24	18	14	14	14	8	17	15	19	12
1890	796	12	11	11	17	37	20	11	11	12	11	15	18	12	29	13	14	21	9	22	9	7	14	11	10
0818	524	11	11	12	13	21	16	11	10	13	9	15	13	11	16	24	17	16	9	17	12	12	4	20	7
076	277	10	10	13	7	13	11	10	9	15	7	12	13	7	12	7	18	15	12	4	14	3	-	11	12
Landline	881	30	29	37	36	42	39	29	29	34	31	22	43	45	41	18	21	31	29	26	31	31	25	30	31
Mobile	881	37	36	42	35	49	40	37	38	41	34	34	38	40	45	41	18	31	35	30	47	39	33	37	40



NGN users' attitude towards NGN costs x demographics

Base: All currently use NGNs (218)

= Significantly higher vs total
 = Significantly lower vs total

	Total	Region				Number of employees			What is your main organisation activity?							
		Dublin	Leinster	Mun-ster	Conn/ UIs	Under 10	11-99	100+	Manufacturing / construction	Wholesale and retail	Accommodation / food service	Financial and insurance	Education	Human health / social work	Other service activities	Others
Base:	218	110	46*	42*	20*	63	94	61	17*	14*	5*	16*	7*	23*	23*	113
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
It is important that consumers are aware of the cost of calling NGNs	63	65	49	62	74	61	61	72	71	74	93	89	49	73	56	55
The cost to your customers of calling NGNs influences your organisation's choice of NGN	53	55	54	51	51	59	37	52	49	54	4	50	68	72	32	55
NGN costs to your organisation are an important factor in choosing your NGN provider	48	51	47	48	40	48	43	52	38	59	34	79	3	56	30	49
Customers choose whether or not to make a call to an NGN depending on the cost of the call	51	52	47	48	58	55	40	49	80	38	60	66	68	62	24	47
None	12	9	9	24	5	9	17	14	2	8	-	-	3	4	19	17

* Caution small base size.
 ** Multiple responses allowed.

Q33 To what extent do you agree or disagree with the following statements, on a 5 point scale where 5= agree strongly and 1 = strongly disagree?

