



Critical Insights into Subscriber Robocall Perceptions

By Transaction Network Services

June 2021

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While the Coronavirus pandemic has posed a challenge for the world's population, robocallers have still managed to successfully deploy tactics to scam victims out of money and personal information, even using contact tracing, PPE and vaccination messages to deceive.

At the same time, the TRACED Act has provided strong guidance for carriers as they continue to evolve their robocall detection and protection measures.

This report reveals the interesting findings of a recent survey conducted in the US, including:

- Perceptions about robocall levels during the pandemic and their origin
- Frustration at missing important calls which have been marked as spam
- How robocalls affect subscribers' choice of carrier
- The impact on home wireline phones
- How subscriber habits are evolving, including the use of robocall apps
- Attitudes towards robocall accountability and punishment

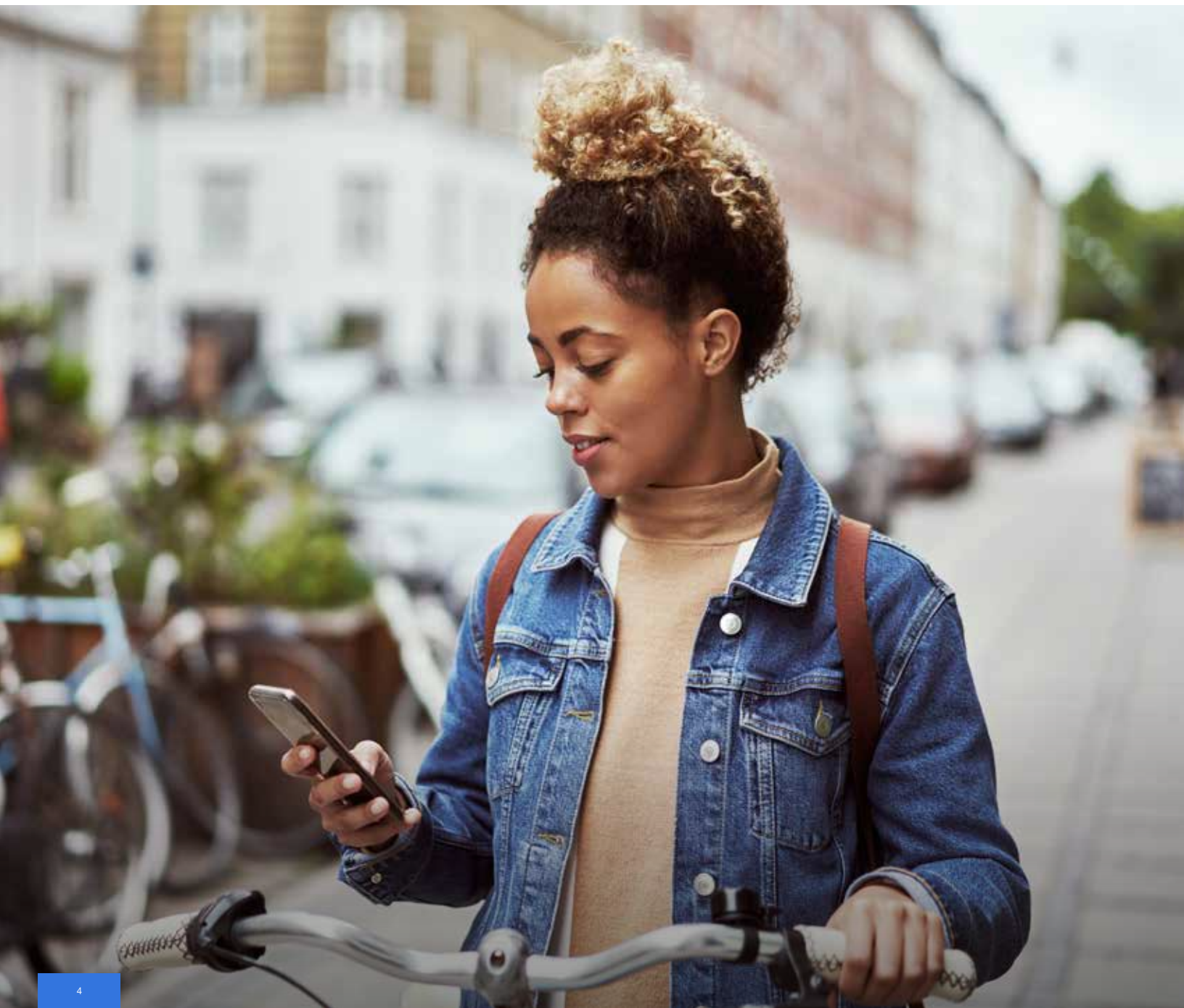
It also provides insights into how much subscribers would be willing to pay annually to stop all unwanted robocalls.



About This Report

Transaction Network Services (TNS) commissioned a US Internet Omnibus Survey by KANTAR, which ran between 6th – 10th May 2021 and covered 1,062 US adults aged 18 to 64 years.

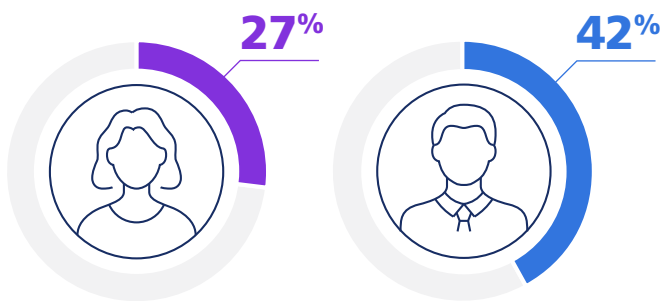
The survey asked respondents to agree or disagree with a series of statements which reflected their attitudes to and experiences with robocalls, who they feel is responsible for reducing unwanted calls and whether the level of robocalls influences carrier choice. This report presents the key findings of this survey.



TNS' own analytics data shows that the Coronavirus pandemic has impacted the level of robocalls with a 28% drop in 2020 compared to 2019. However, do subscribers acknowledge this or have their pre-pandemic perceptions lingered? Our survey sought to find out.

The data reveals that lower numbers of female adults report receiving fewer robocalls than males.

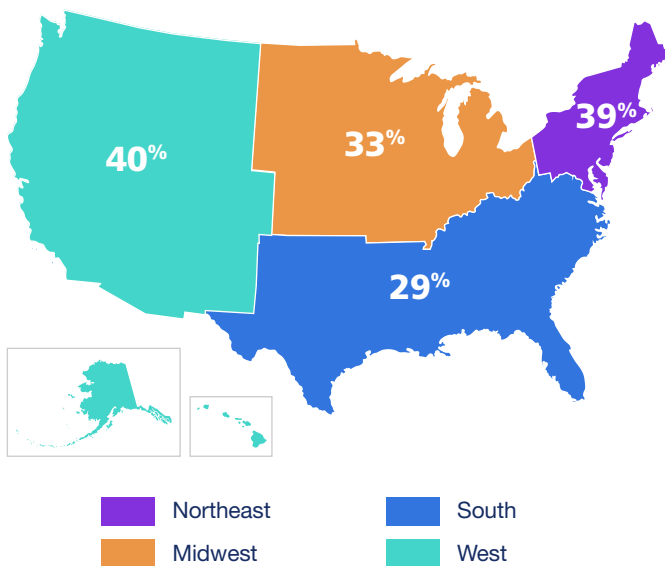
Comparison, by gender, of those who reported receiving fewer robocalls during the pandemic



Only 34% of respondents feel they have received fewer robocalls during the pandemic than they did before.

While those living in the West were most in agreement that they had received fewer robocalls.

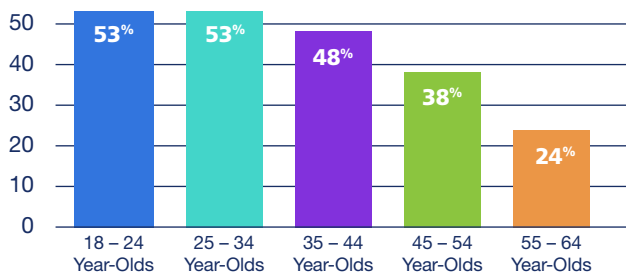
Comparison, by region, of those who reported receiving fewer robocalls during the pandemic



To determine the value that subscribers place on missing important calls our survey explored several areas which may be impacted by robocall protection activities.

Forty-three percent of respondents advised that they had missed at least one important call in 2021 because it was marked as spam.

Number of respondents that had missed at least one important call in 2021 because it was marked as spam, by age



A direct correlation with age can be noted in our data, with the younger age groups reporting the greatest levels of missed calls, including more than half (53%) of 18-to-34-year-olds.

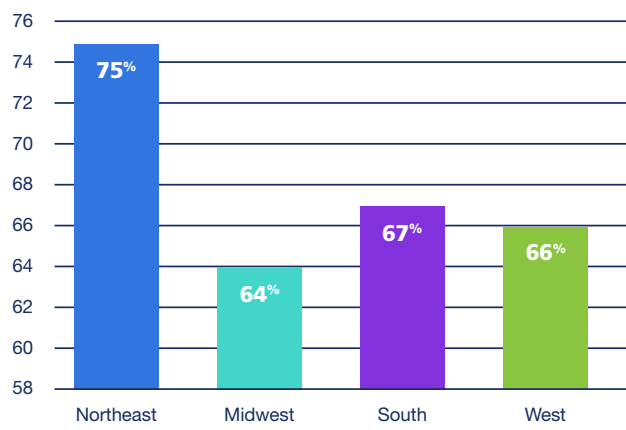


Is it more frustrating to miss an important call than answer a robocall?

Over two thirds (68%) of respondents felt it was more frustrating to miss an important call that was wrongly blocked as spam, than it is to answer an unwanted robocall. The 18-to-34-year-old age group was most dismayed with 77% highlighting their frustration, compared to 56% of 55-to-64-year-olds.

Three quarters of subscribers in the Northeast reported their frustrations, while subscribers living in the Midwest were least frustrated (64%).

Number of subscribers who find it more frustrating to miss an important call that was wrongly blocked as spam than it is to answer an unwanted robocall, by region

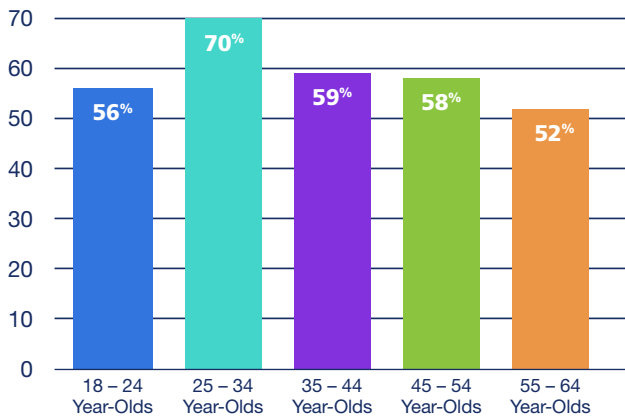


Many factors, including network coverage, reliability and technology, influence subscribers in their choice of carrier.

Our survey aimed to determine whether subscribers' frustration with robocalls also contributed to this decision.

A staggering 70% of 25-to-34-year-olds confirmed this would lead them to switch, while the other age groups were more consistent.

Comparison, by age, of the number of respondents that would permanently switch to a new mobile phone number if the new number did not receive any robocalls



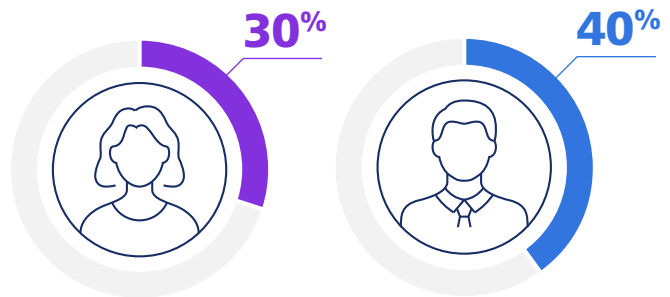
Sixty-seven percent of respondents said they would switch to a wireless carrier that promised zero robocalls.

Aligned with this, we also presented respondents with a conundrum – would they be willing to give up mobile calling and rely solely on mobile texting to eliminate robocalls? More than a third (37%) agreed that they would.

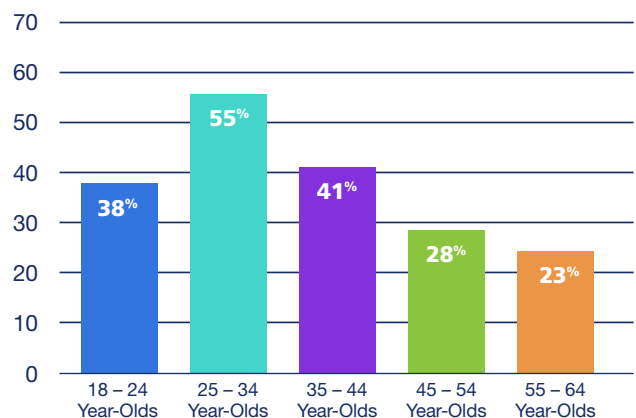
More males than females would make this change and, again, the 25-to-34-year-old age group stood out as the most willing.

Fifty-nine percent of US adults would permanently switch to a new mobile phone number if the new number did not receive any robocalls.

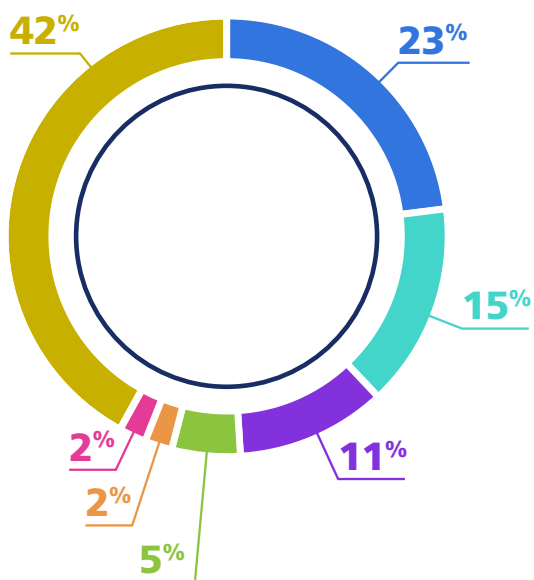
Comparison, by gender, of those who would give up mobile calling and rely solely on mobile texting to eliminate robocalls



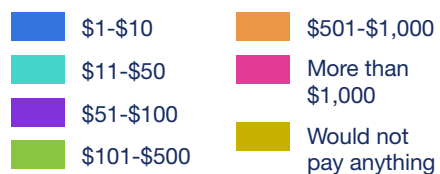
Comparison, by age, of those who would give up mobile calling and rely solely on mobile texting to eliminate robocalls



How much would you pay your telecom provider annually to stop all unwanted robocalls?



Amount subscribers would be willing to pay annually to stop all unwanted robocalls

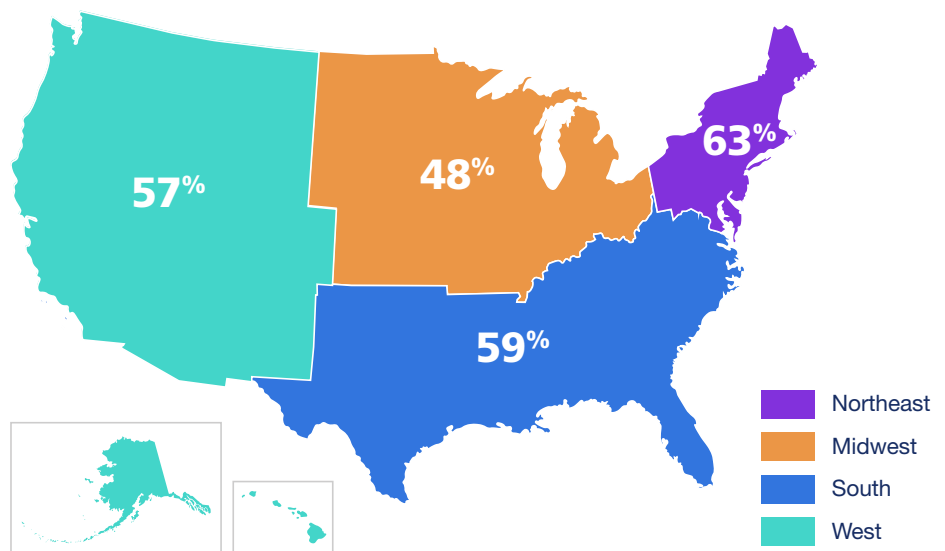


TNS' own data analytics confirm that robocalls to home wireline phones are increasing, so we used the survey as an opportunity to explore if subscribers feel the level has now become unacceptable.

The responses showed a variation by region with those in the Northeast appearing to be worst affected.

Comparison, by region, of those who reported the majority of calls to their home wireline phone were robocalls

In addition, 29% said they had got rid of their home phone service because of robocalls, including 36% of males and 42% of 25-to-34-year-olds.



A significant 78% of respondents believed robocalls to wireline home phones are a growing but overlooked problem, including 82% of females and 90% of 55-to-65-year-olds.





Fifty-seven percent of respondents said the majority of calls to their home wireline phone were robocalls.



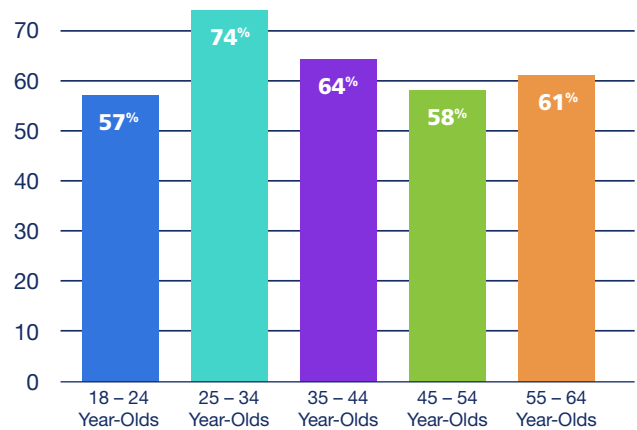
In our survey 77% of respondents said they never answer phone calls from numbers they do not recognize. There was a distinct difference between the generations with 86% of those classed as Baby Boomers saying they never answer unrecognizable numbers, compared to 63% of Generation Z.



Would you answer a call if the caller ID displayed the logo of a brand you recognized?

Sixty-three percent agreed that they would answer a call if the caller ID displayed the logo of a brand they recognized. While the different genders and regions were consistent in their response overall, there was a surprising variation between the younger age groups as shown below.

Comparison, by age, of those who would answer a call if the caller ID displayed the logo of a brand they recognized

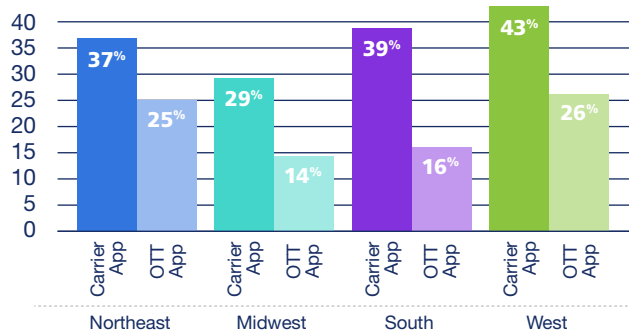


Are subscribers using robocall apps?

We discovered that 38% of respondents had a robocall app through their carrier and 19% had an over-the-top (OTT) robocall app which was not from their carrier.

Usage appears greatest among subscribers in the West.

Number of subscribers who use a robocall app, by region

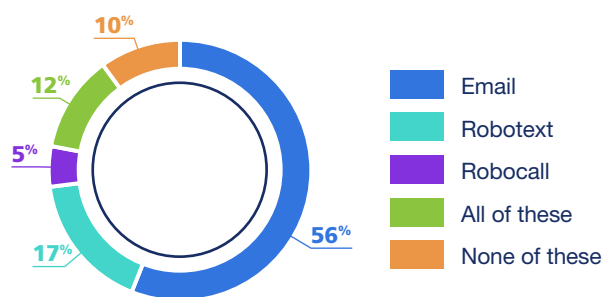


We found that 41% of males were actively using their robocall blocking app, compared to just 33% of females. Within the different age groups those aged 25-to-34 were leading the way with 49% of the group reporting they actively use their robocall blocking app, compared to just 26% of 18-to-24-year-olds.

What is your preferred method for receiving a legitimate business/government service confirmation?

Legitimate service confirmations, like confirming a doctors or plumbers appointment, can often be made by robocalls. We explored with our survey respondents which method of contact is most well received.

Preferred method for legitimate service confirmations



Disappointingly, we found 51% do not know if they have a robocall blocking app on their smartphone.

Are subscribers assisting with the fight against robocalls? We explored who took action in the form of complaints and who they held accountable for managing the robocall issue.

Only 28% overall have submitted a robocall complaint to their state Attorney General, FTC or the Do Not Call Registry over the past 12 months.



More males (34%) than females (23%) made a complaint. Within the age groups, more 35-to-44-year-olds (37%) made a complaint, while only 15% of 18-to-24-year-olds had.

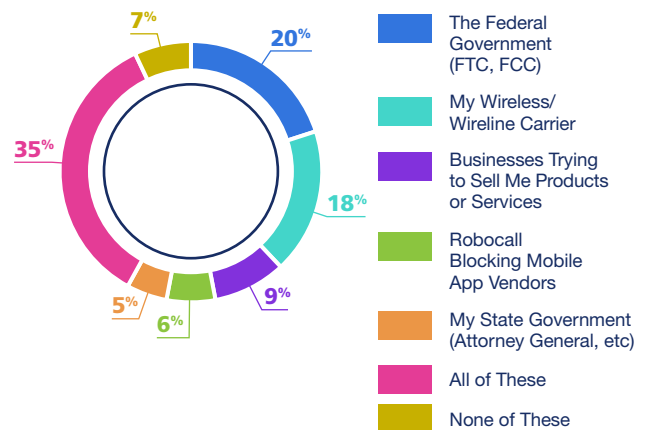
Fifty-two percent of respondents feel their carrier is doing a good job blocking/screen robocalls.

Do subscribers perceive most robocalls originate overseas?

In our survey, 64% of respondents said they believed most robocalls originated overseas rather than domestically. This was consistent across the different age group, regions and genders.

Who do you believe is most responsible for stopping unwanted robocalls?

The entities subscribers feel are most responsible for stopping unwanted robocalls



Fines and jail time for robocall scammers

Eighty-five percent believe robocallers who try and scam consumers out of money and personal information should receive jail time and 90% feel they should pay a financial penalty/fine.



Our survey confirmed that subscribers wish to see harsh penalties for robocallers.



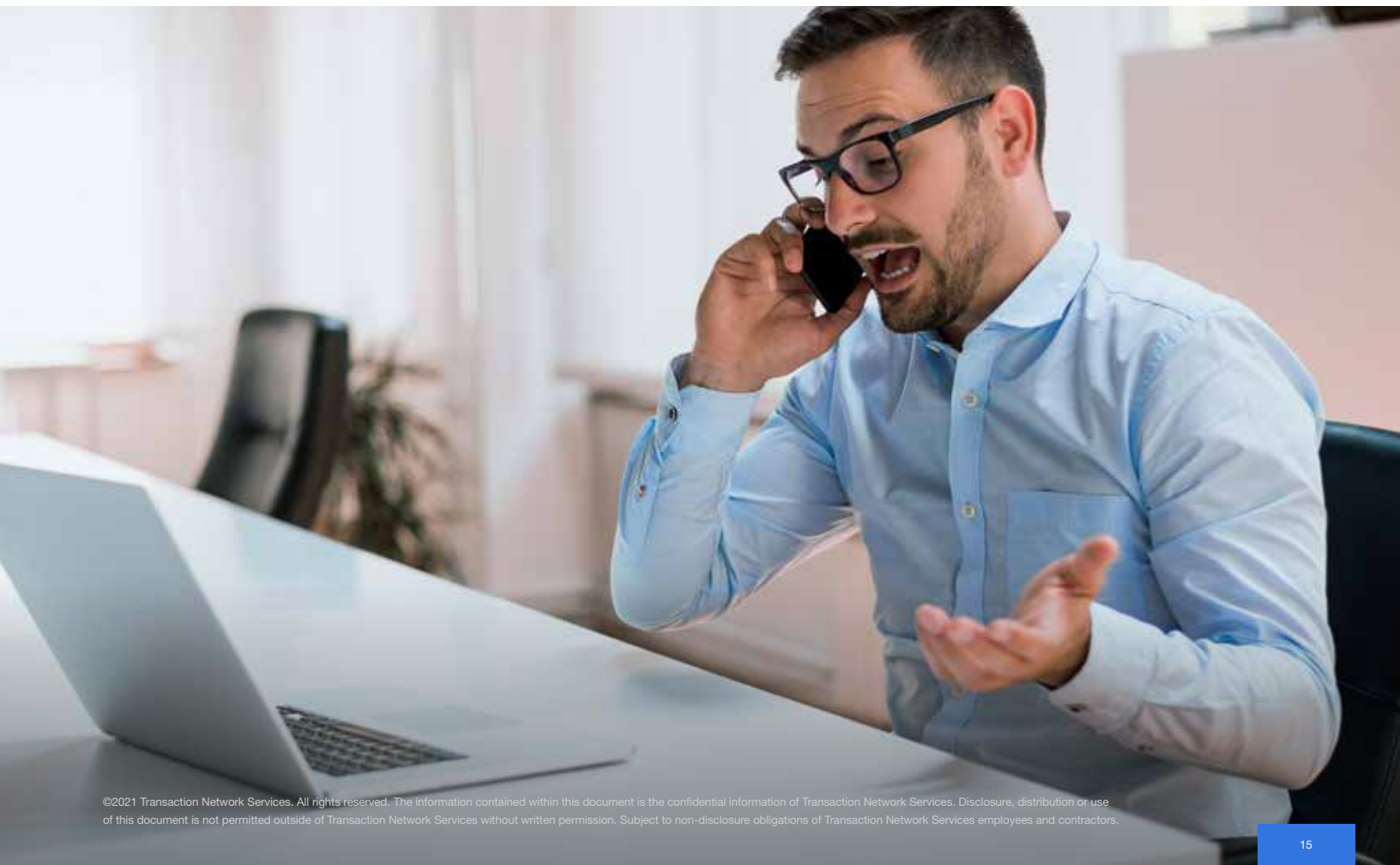
Our survey findings confirm that robocalls remain an emotive issue with subscribers and despite TNS' own analytics showing a fall in robocall levels during the pandemic, subscribers largely remain frustrated by the persisting level of this menace.

While the pandemic may have offered a temporary reprieve, our survey suggests that subscriber frustration has become deeply seated as demonstrated by the perceptions reported in this document.

The prospect of being able to promise zero robocalls may seem a large way out for carriers, but our survey data confirms this should still be an objective to be revered. In the meantime, the importance of good data analytics has never been more critical as subscribers have confirmed that they will move carrier if competitors offer better robocall protection. This confirms that the quality of a carriers' robocall protection strategy is likely to correlate with their ability to retain and attract subscribers. As subscriber demands grow, the carriers with the highest robocall protection levels are best placed to succeed.

Our survey has also highlighted a potential need to provide better education to 18-to-24-year-olds with more than half (53%) stating that they do not know if they have a robocall blocking app on their smartphone and only 26% stating they actively use a robocall blocking app.

Wireline carriers would also be wise to tighten their robocall protection measures as subscribers acknowledge that robocalls are no longer simply a mobile menace and the majority feel the issue within the wireline industry is largely being overlooked.



About TNS and Contact Details

TNS is a leading global provider of Infrastructure-as-a-Service (IaaS) solutions to the communications, payments and financial markets.

Established more than 30 years ago, its extensive portfolio of innovative, value added services now supports thousands of organizations across more than 60 countries to interact efficiently, conduct mission critical processes securely and adopt new technologies flexibly.

TNS' pioneering Communications Markets business has been a continuous innovator interconnecting carrier networks efficiently, securely and reliably. The Communications Market's IaaS solutions support the demanding needs of carriers, from call analytics which identify unwanted robocalls while enabling enhanced mobile identity for legitimate callers, through to interoperability, clearing, settlement and analytics for LTE and 5G.

TNS: A global business with regional strength

- More than 30 years' experience
- Serves 500+ carriers globally
- Reaches more than 7 billion subscribers globally
- Processes over 100 billion signaling, switch and transport messages, and 20 billion database queries monthly
- Handles over 30 billion call events every month
- Offices in 20 countries

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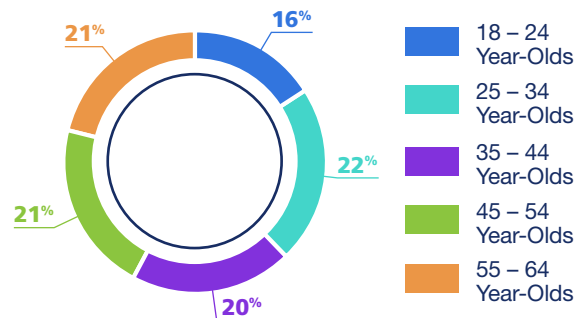


The survey was conducted by online self-completion interview between 6th – 10th May 2021 by KANTAR.

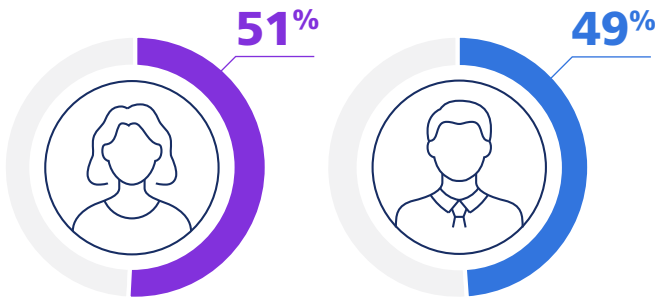
These surveys are designed to be nationally representative of adults interviewed by country. The surveys use a quota sample (age interlocked within gender, and a regional quota). Post fieldwork correctional weighting within age, gender and region, has been used to ensure the representativeness of the survey.

Survey Demographics
1,062 responses received.

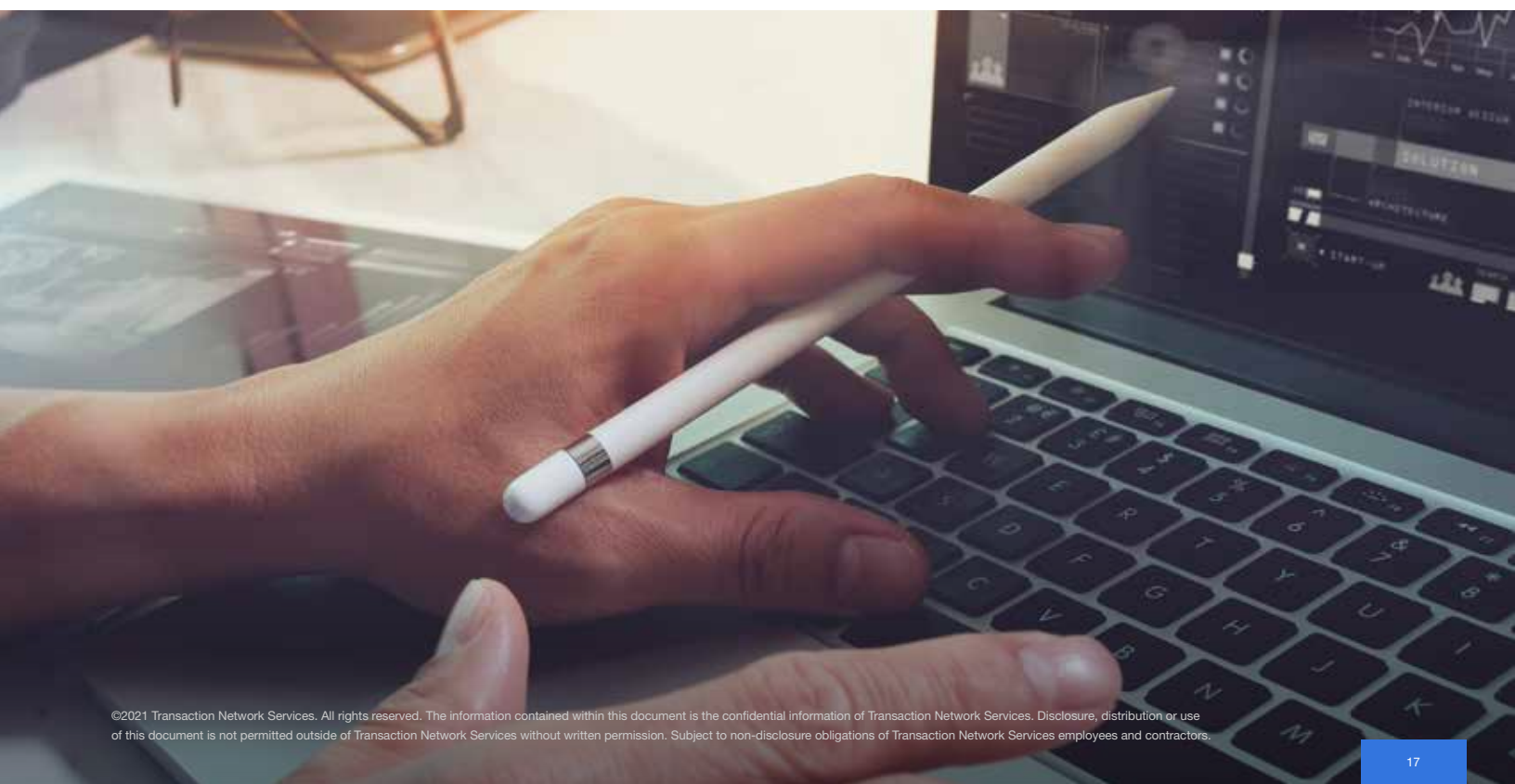
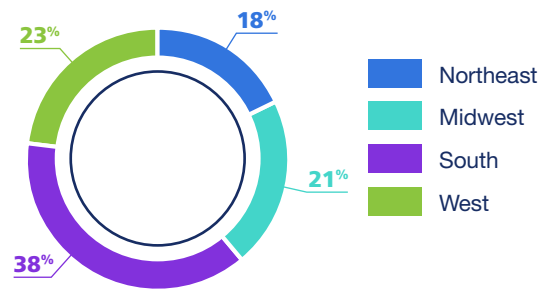
Age Breakdown



Gender Breakdown



Regional Breakdown





**TNS can help your organization
combat Robocalls. Contact us today
via phone, eMail or the web.**

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