

Addressing Low Trust in Voice: Why Branded Calling Is the Future of Enterprise Voice



What Is a Telephone Number and What Does It Do?

To the majority, a telephone number is merely an identifier for phone calls. However, it acts as a unique identifier that plays a central role in how we connect and communicate. For enterprises, a phone number is a vital asset for both inbound and outbound communications.

Phone numbers are used to make and receive calls for customer enquiries, deliver support, and conduct outreach. Whether it is a sales call, a service update, or a help desk interaction, the number behind the call carries weight. It influences trust, brand perception, and even regulatory compliance.

In short, while a phone number may seem simple, it is a powerful tool in modern communications, especially for businesses which need trusted, efficient, and compliant interactions with their customers.

Defining Reputation

The phone number is only as valuable as the reputation that it holds. In today's digital landscape, where spam and unwanted calls are prevalent, the voice channel still represents an important engagement channel across various industries; playing a notable role in the rise of omnichannel communications. Ensuring that the reputation of this phone number is high helps enterprises fully realize the benefits of the voice channel.

A positive reputation ensures that outbound calls from an enterprise are more likely to be accepted by recipients. Many mobile carriers and spam detection services use algorithms to assess the trustworthiness of a number. If a number is flagged as suspicious or spammy, due to high call volumes, poor engagement, or user complaints, calls may be sent to voicemail or labelled as 'spam content'. This can severely hinder outreach efforts, damage brand perception, and reduce operational efficiency.

Factors Impacting Phone Number Reputation



Low Complaint Rates

If there are fewer reports of spam or blocked calls by subscribers, this helps improve the reputation score of a phone number.



Accurate Identification Information

Enterprises can increase the reputation of the phone number in use by ensuring correct and consistent information is displayed.



DNC Adherence

Violating Do Not Call (DNC) regulations will diminish the reputation of a phone number.



High Answer Rates

If a phone number has high answer rates, a higher reputation can be assigned to it.



Knowing Suitable Call Times

Adhering to the outlined appropriate times is essential to maintaining reputation.



Use Different Outbound Numbers

Outbound numbers used for multiple purposes (ie by different departments) tend to get flagged by analytics engines and thus receive mixed feedback from consumers.

For outbound communications, a reputable phone number builds trust with customers. When people see a familiar or verified number, they are more likely to call back, engage, or feel confident they are speaking with a legitimate business. This is especially important in industries such as healthcare, finance, and retail, where trust and security are paramount.

The Impact of Reputable Numbers on Enterprise Communications

Enterprises must ensure that the phone numbers they use are assigned a good reputation score, especially those that rely heavily on voice communications, where timely communication can affect health or finances; as maintaining a high reputation score is essential.

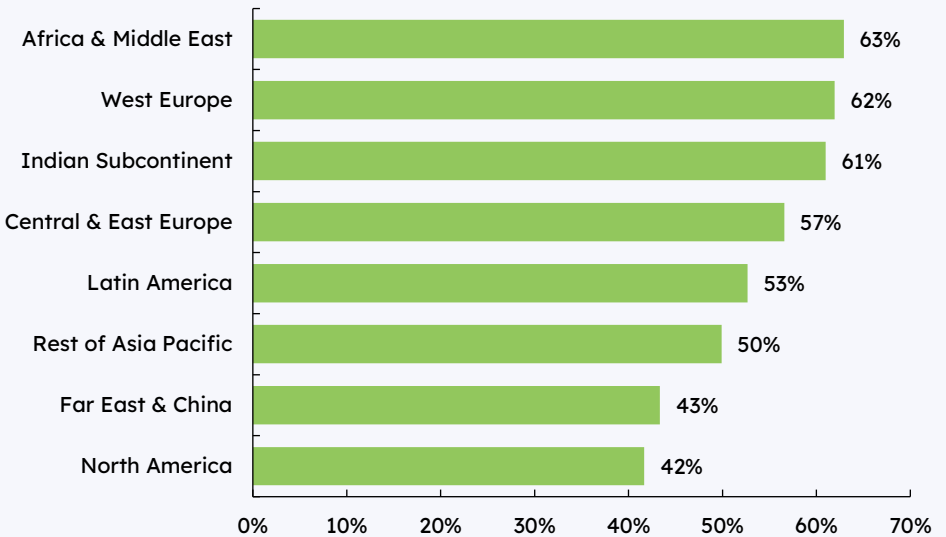
Voice calls remain one of the most direct and effective channels for enterprise communication. In the healthcare industry, for example, voice calls are used to confirm appointments, deliver test results, coordinate care, and manage emergencies. At a time where the role of omnichannel communication strategies is growing, voice channels remain essential for these use cases. These calls often carry sensitive or urgent information, and their success depends on whether the recipient picks up.

Due to the rise in spam and robocalls, many people hesitate to answer calls from unknown numbers. This hesitation can lead to missed appointments, delayed treatments, and increased operational costs.

Call pick-up rates are a key performance metric for enterprise communications. Shown in figure 1 are the average annual call pick-up rates for 8 Key Regions in 2024. Call pick-up rates vary significantly across regions, due to differences in consumer behavior, telecom infrastructure, regulatory environments, and cultural attitudes toward

voice communication. In countries with advanced mobile networks and high smartphone penetration, such as Australia, Singapore, and the UK, call engagement tends to be higher, especially when enterprises use verified or branded numbers. In contrast, regions such as Vietnam or parts of South America experience lower pick-up rates, due to network congestion, limited caller identity transparency, or widespread spam call activity; while a high prevalence of fraudulent and scam robocalls across North America has led to much lower call pick-up rates in this region.

Figure 1: Call Pick-up Rates in 2024 (%), Split by 8 Key Regions



Source: Juniper Research

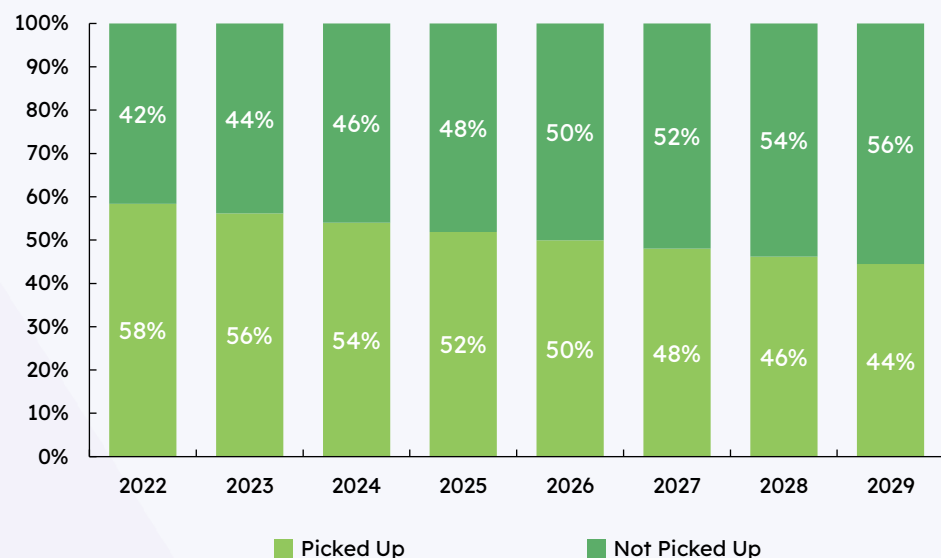
However, despite these regional differences, a global trend is emerging; call pick-up rates are declining year-on-year. This decline is largely driven by changing consumer behavior, as people are increasingly cautious about answering calls from unknown numbers, particularly as spam, robocalls, and impersonation scams become more prevalent. Even

legitimate enterprise calls are often ignored if they lack clear identification or context. As a result, the voice channel, which was once a cornerstone of enterprise communication, is at risk of losing its effectiveness and value.

Enterprises must consider all impacts of declining call pick-up rates. Not only are there the immediate impacts of a missed call, but potentially long-lasting ramifications and damage to brand reputation if a customer is unsure whether they are being called by a legitimate brand.

Missed calls also cause higher follow-up costs and reduced customer satisfaction. A low pick-up rate can disrupt enterprises' workflows and reduce customer and employee satisfaction.

Figure 2: Proportion of Global Outbound Calls from Contact Centers Picked Up and Not Picked Up (%), 2022-2029



Source: Juniper Research

As can be seen from figure 2, this year, the number of calls from call centers picked up by subscribers is expected to be surpassed by missed or ignored calls for the first time. This is a trend noted by many leading communications companies such as TNS, which are implementing technologies to enable enterprises to reverse this trend.

Branded calling enhances the visibility and trustworthiness of enterprise calls by displaying verified information on the recipient's phone screen. Instead of seeing a generic or unknown number, the recipient sees the enterprise's name, logo, and even the reason for the call. This transparency significantly boosts the likelihood of the call being answered.

Enterprise verification is the foundation of the value proposition of branded calling. It ensures that the phone number is authenticated and associated with a legitimate business. This verification provides enterprises' customers with an additional layer of confidence that they are speaking to a legitimate representative of the business to which they believe they are speaking.

Displaying the company logo adds immediate visual recognition; reinforcing brand trust and familiarity. Including a reason for the call provides context; making the call feel relevant and important. However, to maintain the value of branded calling services, there needs to be high trust in this authentication process. For healthcare providers, branded calling can improve patient engagement. Patients are more likely to answer calls when they can be certain it is their healthcare provider calling with relevant information. By leveraging branded calling solutions, healthcare providers can create better appointment adherence, faster response times, and improved health outcomes.

How Businesses Can Use Phone Number Assessments

The first step in maximizing call pick-up rates is to assess the current reputation score of a phone number. When a phone number has a strong reputation score, it signals to carriers and call recipients that the number is legitimate and not associated with spam or fraud. This increases the likelihood that calls will be completed successfully and not blocked or flagged. More importantly, it is another valuable tool in demonstrating to call recipients that the call is worth answering.

Figure 3: TNS' Branded Calling Solution



Source: TNS

Improving call pick-up rates must be a top priority for enterprises, especially those that rely on outbound calling for customer engagement, service delivery, or patient care. Traditional methods, such as local numbers or optimizing call times, have limited impact in today's environment where consumers are inundated with unwanted calls. What is needed is a solution that builds trust at the point of contact.

Branded calling technology addresses this challenge by transforming how enterprise calls appear on mobile devices. Through enterprise verification, businesses can authenticate their identity with carriers; ensuring their calls are recognized as legitimate. Once verified, enterprises can display their brand name and logo on the recipient's screen. This not only boosts recognition but also provides context; making the call feel relevant and trustworthy.

Branded calling also helps enterprises protect their reputation. By preventing spoofing and impersonation, it ensures that customers and patients only receive calls from verified sources.

Solving These Market Pain Points

Low call pick-up rates and limited user interaction present multiple challenges for enterprises across all industries. These issues not only impact efficiency, but also incur financial and reputational costs. Despite the rise of digital platforms, voice remains central to customer experience.

When consumers stop answering calls, due to mistrust or misidentification, contact centers will suffer. Agent productivity will decline, follow-up costs increase, and customer complaints rise. Unanswered legitimate calls often lead to missed opportunities to deliver critical information, such as account updates, appointment confirmations, payment alerts, and product offers.

The inability to connect with customers in real-time erodes the value of voice as a trusted channel and diminishes its role in driving engagement and retention.

One of the primary pain points is the cost of follow-up. When a call goes unanswered, an enterprise must dedicate resource and additional time attempting to reconnect. For healthcare providers, this can mean delays in delivering critical information, such as test results or treatment plans. These delays not only affect patient outcomes but also increase administrative overhead. Each missed call can translate into hours of lost productivity, higher staffing costs, and reduced patient satisfaction.

Moreover, low engagement rates lead to inefficient business operations. For example, when healthcare users do not answer calls to confirm appointments, clinics experience no-shows, which disrupts scheduling and reduces revenue.

Additionally, low pick-up call rates generate significant impacts on brand reputation. In today's digital economy, consumers are increasingly expecting transparency and responsiveness from service providers. Enterprises that do not validate their identities, via available technologies, risk being perceived as unreliable; a particularly damaging impact in industries where personal data or high-value transactions occur. To address these challenges, enterprises must leverage the technologies available to improve call answer rates and enhance user interaction; most notably branded calling technologies.

By displaying the enterprise's name and logo on the recipient's phone screen, branded calling transforms the experience from anonymous to familiar and trustworthy. This visibility reassures those receiving the call that it is legitimate and relevant; significantly increasing the likelihood of engagement.

The Importance of Continual Monitoring for Reputation

Continually monitoring the reputation of a phone number is essential for enterprises that rely on voice communication, especially as fraud tactics evolve and adapt to new technologies. A phone number's reputation is not static, and it will change based on recent call behavior and feedback from users. Active monitoring is essential: even a previously trusted number can become flagged; leading to reduced call answer rates and diminished customer trust, especially if a bad actor has illegally spoofed the phone number for fraudulent activity.

Fraudsters are using increasingly sophisticated tactics to achieve successful number spoofing, and impersonation to deceive recipients. These tactics not only erode confidence in voice calls, but can also damage the reputation of legitimate businesses, if their numbers are misused or mistaken for spam.

Damaged phone number reputation can harm brand perception. Customers that associate a business with spam or unwanted calls may lose trust, disengage, or even switch providers. In industries where trust is paramount - such as healthcare, finance, or public services - this reputational damage can be long-lasting.

By continuously monitoring phone number reputation, enterprises can proactively address issues, maintain high call deliverability, and protect their brand. This vigilance, combined with technologies such as branded calling and enterprise verification, ensures that voice communication remains a trusted and effective channel in an increasingly complex digital landscape.

What Are the Best Practices for Enterprises in Maximizing the Value of Phone Numbers

Maximizing the value of enterprise phone numbers is essential for maintaining effective communication, customer trust, and operational efficiency. As voice remains a critical channel for most industries, particularly healthcare, finance, and logistics, best practices around phone number reputation management can significantly impact business outcomes.

Monitor Reputation Continuously

As a phone number's reputation is dynamic, it can degrade over time due to user complaints, spam reports, or spoofing. Enterprises must use monitoring tools to track how their numbers are perceived across networks and devices. Early detection

of reputation degradation allows for timely remediation before it affects call deliverability and impacts brand reputation.

Maintain Consistent Call Behavior

Operators and analytics platforms regularly monitor call patterns to assess reputation. Issues that can impact reputation include sudden spikes in call volumes, short duration calls, or high call abandonment rates. These can trigger flags indicating that the phone number is not being used correctly and can degrade the reputation of the number. Instead, enterprises must seek consistent calling behavior to maintain a positive reputation score.

Implement Enterprise Verification

Registering phone numbers with operators and verification platforms ensures they are recognized as legitimate by both the originating and terminating parties; enabling an efficient verification process when the call is placed. Verified numbers are less likely to be mislabeled as spam and more likely to be trusted by recipients.

Branded Calling

Enhancing outbound calls with branded elements such as company name, logo, and reason for the call dramatically improves pick-up rates, as they foster confidence among mobile subscribers. Enterprises must ensure that their branding is clear and consistent across all channels to provide a reliable user experience.

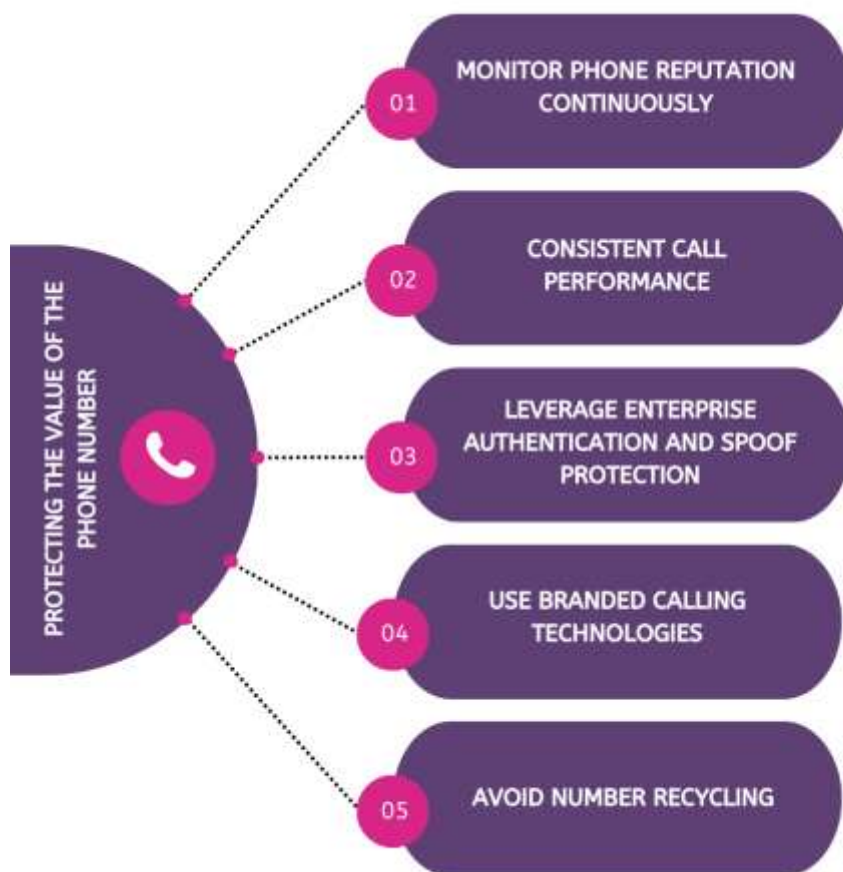
Avoid Number Recycling

Reusing numbers which were previously flagged or associated with spam can carry over negative reputation. When a number is recycled or reassigned after being previously used, the enterprise could inherit a phone number with a negative reputation score.

Businesses that use recycled numbers risk being flagged, which can undermine their communication efforts. By ensuring numbers are clean and consistently used, organizations protect their sender's reputation, improve message success rates, and maintain credibility with customers.



Figure 4: Key Actions for Enterprises to Protect the Value of Phone Numbers



Source: Juniper Research

Why Enterprises Need Varying Levels of Protection

Enterprises across different industries rely on voice communication to engage customers. The reputation of their phone numbers plays a vital role in ensuring these channels are trusted. However, the level of protection required for phone number reputation varies significantly depending on the industry, the sensitivity of the information being shared, and the potential impact of communication failures. There is no 'one-size-fits-all' approach, and enterprises will look to secure return on investment (ROI) from branded calling services by only spending on services that they require.

In healthcare, for example, phone calls are used to deliver diagnoses, confirm appointments, and provide urgent updates. A poor reputation score will result in calls being blocked or ignored by the mobile subscriber; delaying the relay of often critical information.

Healthcare providers need the highest level of protection to ensure their calls are recognized as legitimate and answered promptly. This must include continuous monitoring, enterprise verification, and branded calling to display the provider's name, logo, and reason for the call.

Additionally, voice calls are used for fraud alerts in the financial sector, as calls require immediate contact with the banking user. They are also used for transaction verification and customer support.

The financial sector is also at the most risk of impersonation scams and phishing. Indeed, financial institutions are increasingly concerned about protecting their phone number from spoofing, to protect their own banking customers. A compromised reputation can lead to missed fraud alerts or customer distrust, which can have serious financial and legal consequences.

Even public sector organizations - such as local councils or emergency services - require robust protection. Their calls often involve public safety

or civic responsibilities, and being misidentified as spam can undermine trust in government communications.

Future-proofing the Voice Channel for Enterprises

As consumer behavior continues to shift and fraudulent tactics grow more sophisticated, enterprises must adopt branded calling solutions that actively protect the reputation of their phone numbers. In today's communication landscape, trust is becoming increasingly fragile, and enterprises must implement any technology which can increase trust.

Branded calling solutions enhance the visibility and credibility of enterprise calls by displaying verified information on the recipient's device. This transparency helps overcome any issues regarding trust or reluctance to answer unidentified calls.

The need for protection is especially urgent as fraudsters increasingly imitate legitimate businesses to deceive consumers. If an enterprise's phone number is compromised or misused, that enterprise can quickly lose its reputation; leading to blocked calls, reduced engagement, and long-term damage to brand trust.

Branded calling solutions must be viewed as a multi-layered defense solution. Enterprise verification ensures that the calling number is authenticated and recognized by carriers while anti-spoof call measures quickly block non-authenticated calls. This reduces the risk of spoofing, and helps maintain a positive reputation score. Logo display reinforces brand recognition, while call reason messaging provides immediate context; making the call feel relevant and trustworthy.

Ultimately, branded calling is about adapting to a changing environment. As consumer expectations rise and fraud tactics evolve, enterprises must proactively protect their phone number reputation. By adopting branded calling solutions, they not only improve call answer rates, but also

reinforce trust, reduce operational costs, and future-proof their communication strategies.

The TNS Solution



With numerous key clients and partners, TNS serves the financial, banking, and telecommunications industries worldwide. These include AT&T, Verizon, Comcast, Telus, Microsoft, Vodafone, and T-Mobile.

TNS works with more than 500 operators and directly supports more than 150 service providers to provide analytics for their subscribers.

For over five years, TNS has been in partnership with Allianza; enabling a full end-to-end solution to meet compliance, legislative, and regulatory requirements surrounding robocall mitigation in the US and Canada; building to over 150 service provider customers in the market.

In December 2022, TNS formed a partnership with TransUnion (formerly Neustar) and First Orion, to advance call vetting and authentication standards with a single framework across the largest carriers in the United States. This enables secure and trusted calls to many households that rely on landline phones. In October 2024, the partnership announced the availability of branded calling with logos across the top three US wireless carriers.

TNS also entered a partnership with Sandler; enabling Sandler partners to offer their clients TNS call analytics, robocall mitigation, and branded calling solutions.

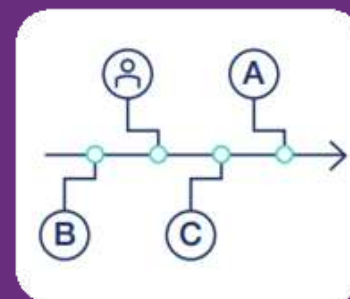
In March 2025, UScellular became a TNS approved partner for branded calling; permitting TNS Enterprise Branded Calling customers to extend branded calls to UScellular customers.

High-level View of Offerings

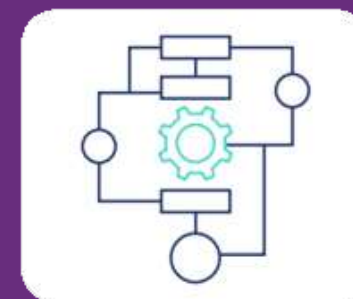
The TNS Communications portfolio includes a comprehensive identity and protection remit, where rich content branding identification can be integrated into major wireless networks; increasing answer rates and building trust with customers.

- **TNS Enterprise Branded Calling** – branded caller ID provides rich call information to restore trust in customer communications. It allows customers to see the company name, as well as a company logo; instilling trust in who is calling. Only authenticated calls will provide a name and logo. This can be combined with real-time alerts and notifications for reputation monitoring to enable enterprises to maintain visibility over their communications.
- **TNS Enterprise Authentication and Spoof Protection** – helps solve problems caused by call spoofing. By leveraging industry standards and Application Programming Interfaces (APIs) to authenticate calls, it ensures only legitimate, verified calls are delivered with branding to consumers. It immediately blocks non-authenticated calls from using an enterprise's number, by filtering authenticated calls and providing real-time reporting on spoofing activities.
- **TNS' Identity and Protection Solutions** – TNS Telephone Number (TN) Reputation Monitoring and TN Insights service allows businesses to be cognizant of their own reputational score, which may be low due to robocalling and associated call fraudsters impersonating their legitimate work. This service has the potential to also alert businesses of the scale of legitimate calls which are being incorrectly labeled as spam, and, where applicable, the steps needed to be taken for an improved reputational score and an uptick in answered calls. TN Insights reports outbound call data metrics, including calls answered, declined, blocked, and missed, along with contact rate, duration analysis, and the ability to benchmark calling practices against industry peers.

Figure 5: TNS Call Guardian Authentication



Data Sources



Machine-learning
Algorithm



Block Fraudulent Calls



Real-time Robocall +/-
Scoring

About TNS



Founded in 1990, TNS is a global provider of mission-critical communications platforms, designed to improve communications and transactions to the payments, financial, and communications industries. In 2021, TNS was acquired by Koch Equity Development, the investment and acquisition subsidiary of Koch Inc. Koch companies have made more than \$30 billion in technology-related investments in recent years, and their acquisition of TNS will expand its approach to technological transformation.

In August 2022, TNS announced the acquisition of AGNITY Global, a leading provider of intelligent business communication applications and infrastructure. This allows TNS' existing customers to benefit from a broader portfolio of next-generation solutions.

The leadership team consists of Mike Keegan (CEO), Mark Cole (Chief Network Officer), Jim McLaughlin (General Counsel and Secretary), John Tait (Global Managing Director, Payments Market Business), Tom Lazenga (General Manager, Financial Markets Business), Seth Walton (General Manager, Communications Markets Business), Umer Ayub (Chief Risk Officer), and Kent Kling (Chief Security Officer). Headquartered in Reston, VA, TNS has 30 offices throughout North America, Brazil, Europe, and Asia Pacific; supporting organizations in more than 60 countries.

Specifically, TNS' points of presence in Europe include Italy, France, Germany, Poland, Spain, and the UK. Asia Pacific operations are in Australia, New Zealand, Hong Kong, India, Japan, Malaysia, Philippines, South Korea, Singapore, Sri Lanka, Taiwan, and Thailand.

<https://tnsi.com/enterprise-branded-calling/>

About Juniper Research



Juniper Research was founded in 2001 by the industry consultant Tony Crabtree, in the midst of the telecoms and dot-com crash. The business was fully incorporated in February 2002 and has since grown to become one of the leading analyst firms in the mobile and digital tech sector.

Juniper Research specializes in identifying and appraising new high-growth market sectors within the digital ecosystem. Market sizing and forecasting are the cornerstones of our offering, together with competitive analysis, strategic assessment, and business modeling.

We endeavour to provide independent and impartial analysis of both current and emerging opportunities via a team of dedicated specialists - all knowledgeable, experienced and experts in their field.

Our clients range from mobile operators through to content providers, vendors, and financial institutions. Juniper Research's client base spans the globe, with the majority of our clients based in North America, Western Europe, and the Far East.

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