

CGA  **TM**

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Background

- To ensure public safety, the Common Ground Alliance launched 811, a free national call-before-you-dig number, on May 1, 2007.
- In June 2007 and July 2008 national awareness levels of 811 were measured.
- To track the changes in awareness levels and use of the 811 service, another national phone survey was conducted between July 30-Aug.2, 2010. The report shows the results from this latest phone survey and compares them to results from the study in 2008.
- A total of 2,000 responses were collected, the same sample size as 2008.





Background

- Measure awareness of general call-before-you-dig service, unaided and aided awareness of 811, advertising awareness, prior use of 811 and future intent to call 811.
- Gender, age and geographic data were collected, identical to the proportions from 2008.

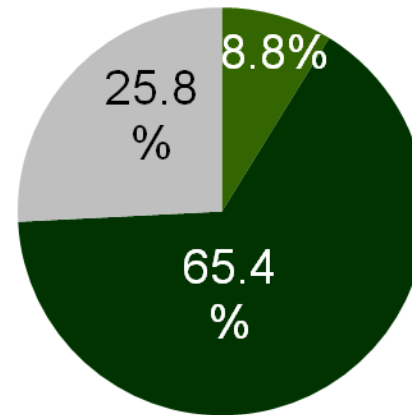
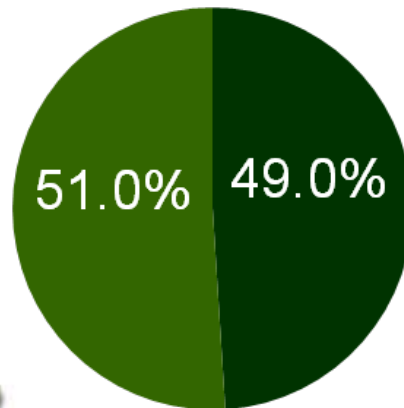


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Demographics

National quotas were set for gender and age to assure the samples sizes were comparable to data collected from 2008.

■ Male ■ Female ■ 18-24 ■ 25-54 ■ 55+





Geographic representation

48 states + the District of Columbia were represented in the study (Hawaii and Alaska were not included).

States with highest representation:

- California (248)
- Texas (154)
- New York (133)
- Florida (118)
- Illinois (88)
- Pennsylvania (85)
- Ohio (79)

States with lowest representation:

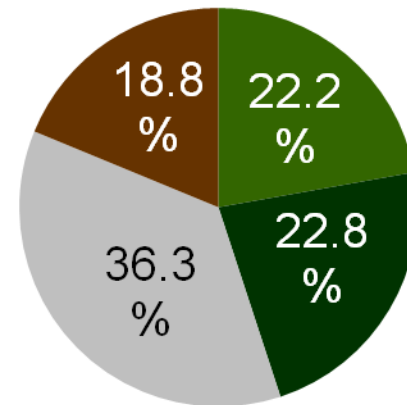
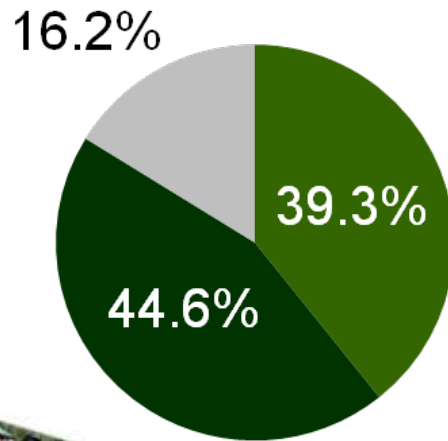
- Wyoming (3)
- District of Columbia (4)
- North Dakota (4)
- Vermont (4)
- South Dakota (5)
- Delaware (6)
- Montana (6)
- Rhode Island (7)



Geographic representation

Geographic quotas were set for the survey to ensure we not only had a national representation but that residents living in rural, suburban and urban areas were all appropriately represented.

- Rural
- Suburban
- Urban
- West
- Midwest
- South
- Northeast





Key findings

- Close to half of all respondents were aware of call before you dig.
- One in four respondents were aware 811 is the phone number to call.
- Residents of the Midwest have the highest awareness levels, are more likely to have called 811 in the past, and more likely to call it in the future compared to other regions.
- Males are more likely to be aware of 811 and to have used it before but once females learn of the service, they are just as likely to use it in the future.





Key findings

Differences from 2008 to 2010

- Overall awareness of the 811 service has increased from 2008 to 2010.
- Unaided recall of the 811 number has decreased but aided recall has increased.
- Future intent to call 811 has also increased slightly from 2008.





Overall responses



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Awareness levels

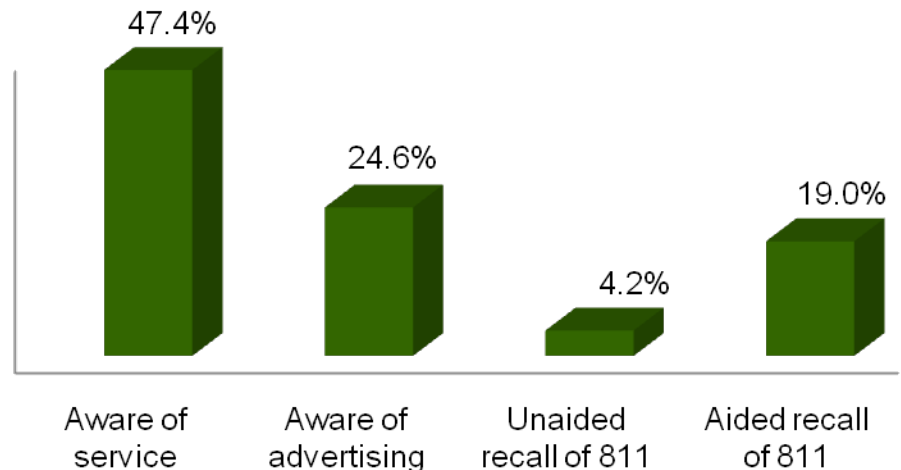
- Close to half of all respondents are aware of a call-before-you-dig service, while one quarter of respondents say they have seen or heard advertising promoting 811.
- The chart shows percentage of the entire survey sample.

Of those aware of CBYD:

- 8.7% recall 811 unaided.
- Another 26.5% recall 811 aided.

Of those aware of the advertising:

- 11.0% recall 811 unaided.
- Another 45.0% recall 811 aided.



Of those who had no recall of the 811 number (neither aided nor unaided), only 6.4% were planning a digging project this year.

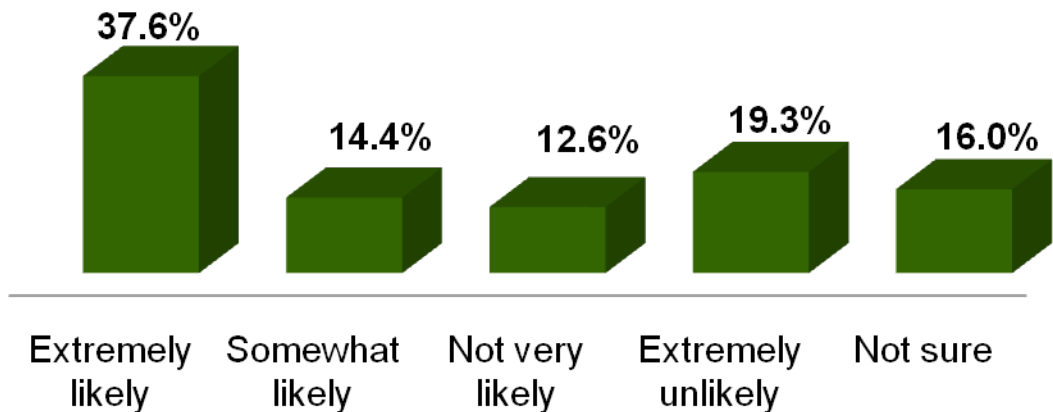




Past use of and future intent to call 811

- 25.5% of respondents who are aware of the 811 number (aided or unaided) have called the number. (5.9% of the total respondent base has made an 811 call).
- 52.0% of respondents are either extremely or somewhat likely to call 811 before future digging projects.

Likelihood to call 811 in the future

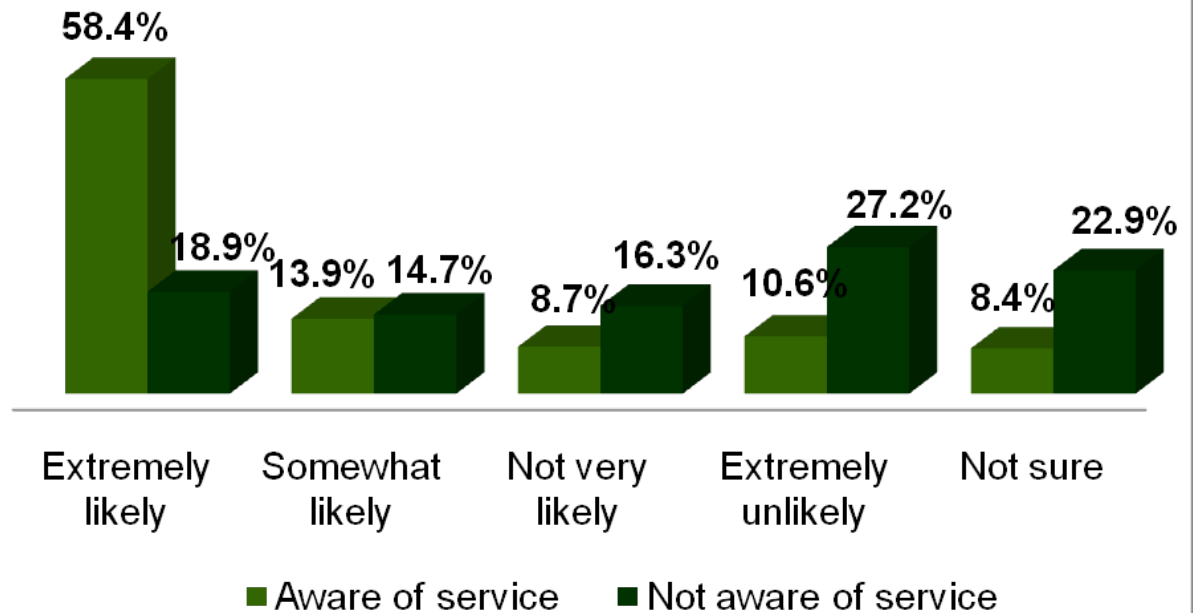


Note: the question of future intent to call 811 was asked to all respondents regardless of their prior awareness level.



Future intent to call 811

- The chart compares the future intent to call 811 among respondents who were aware of the 811 service prior to the survey and those who were not aware of it.
- 72.3% of respondents who were aware of 811 indicated that they are extremely or somewhat likely to call the number before future digging projects.





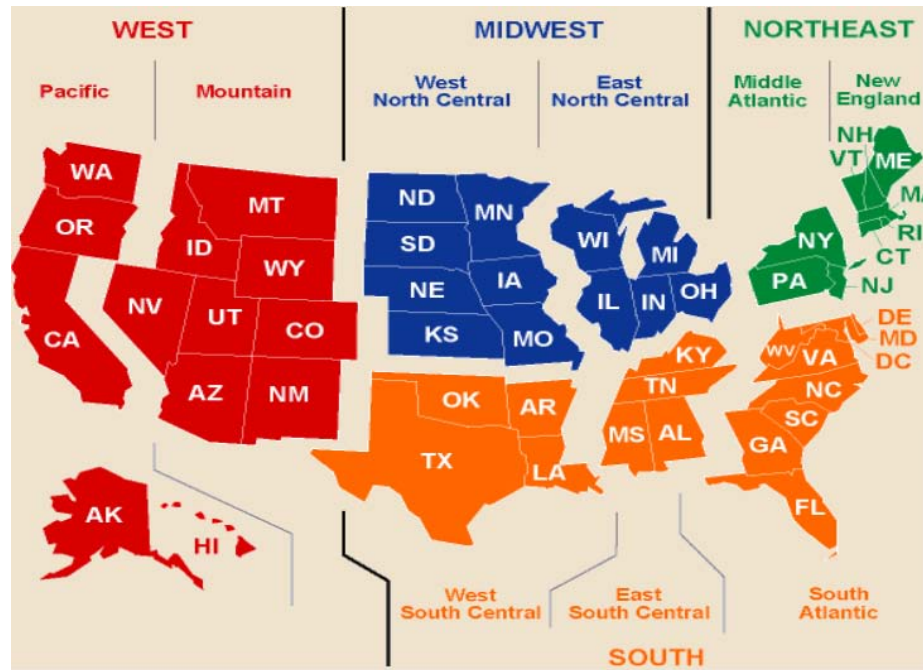
Differences within regions



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Four Census Regions Defined



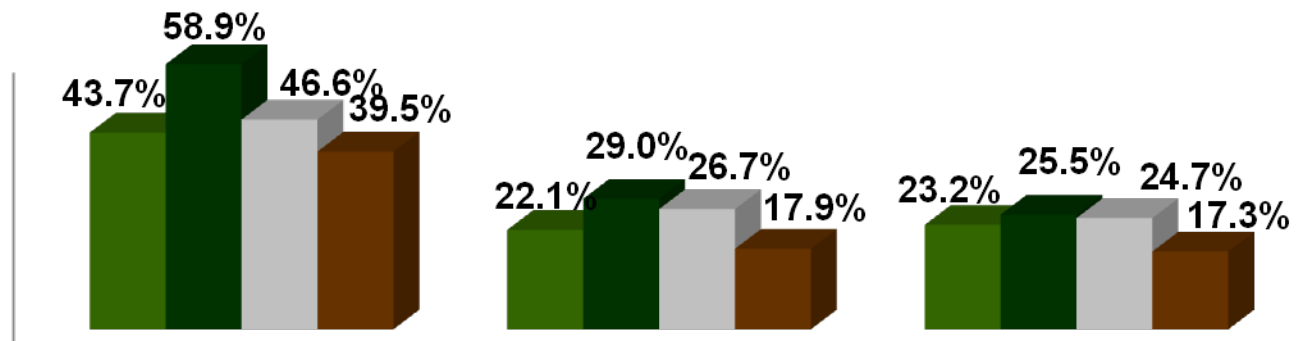
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Awareness levels within regions

- Awareness levels are consistently highest in the Midwest region and lowest in the Northeast region.
- The chart shows percentage of all survey respondents from the specific region.

Note: Base was too low to measure unaided awareness by region so unaided and aided recall have been combined.



Aware of service

Aware of advertising

Combined recall of 811

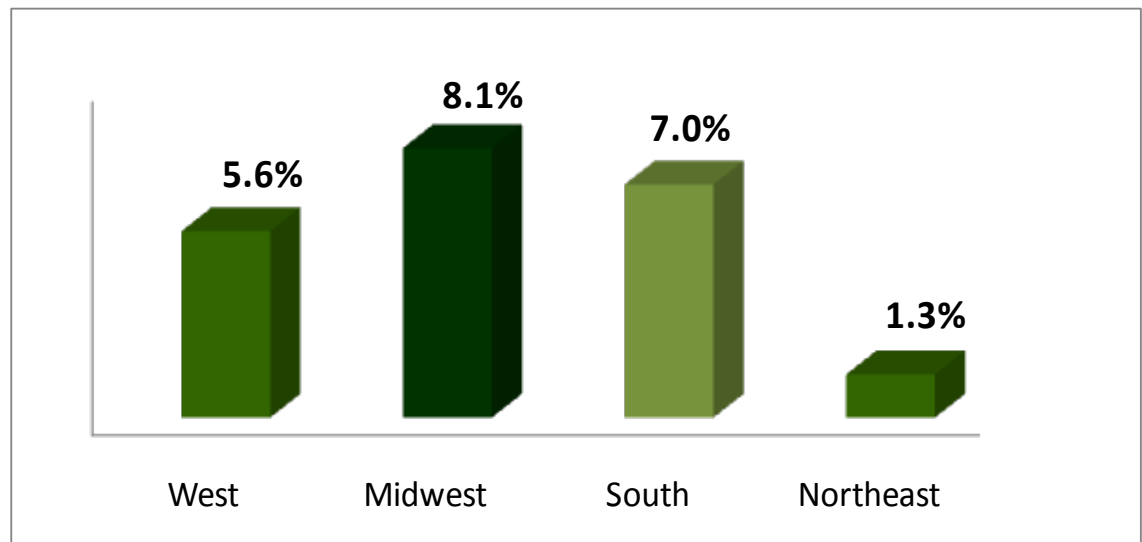
■ West ■ Midwest ■ South ■ Northeast



Have called 811 before

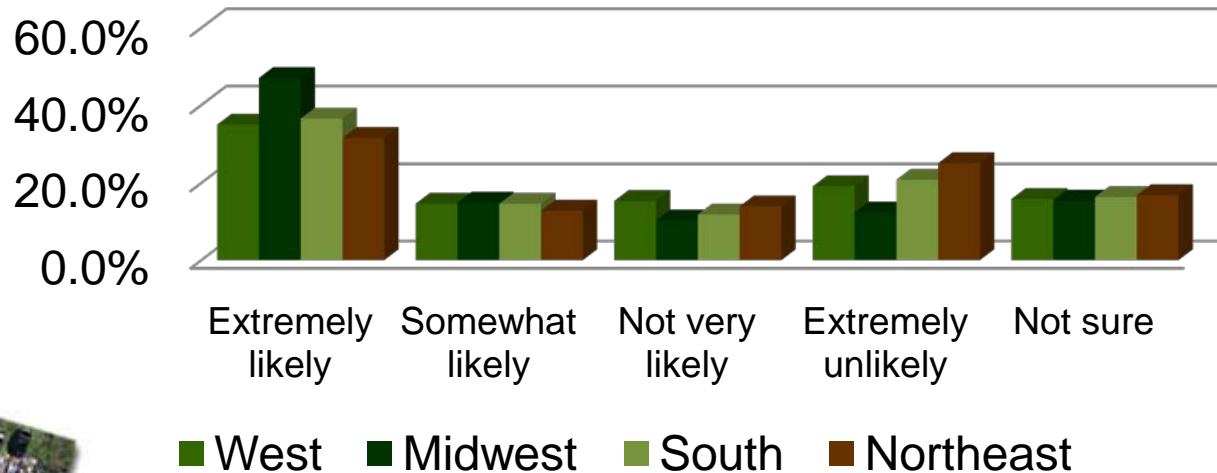
- Residents of the Midwest are slightly more likely to have used the 811 service.
- The chart shows percentage of all survey respondents from the specific region.

Note: Base is too low for the Northeast region to get an accurate measurement of prior use of 811. Percentage should be read with caution.



Future intent to call 811

- Residents of the Midwest are also the most likely to use the 811 service in the future with 61.9% either extremely likely or somewhat likely to call in the future.
- Residents of the Northeast region are the least likely to call 811 in the future with 44.3% either extremely likely or somewhat likely and 25.1% indicating they are extremely unlikely to use the service in the future.





Differences within urban, suburban and rural areas



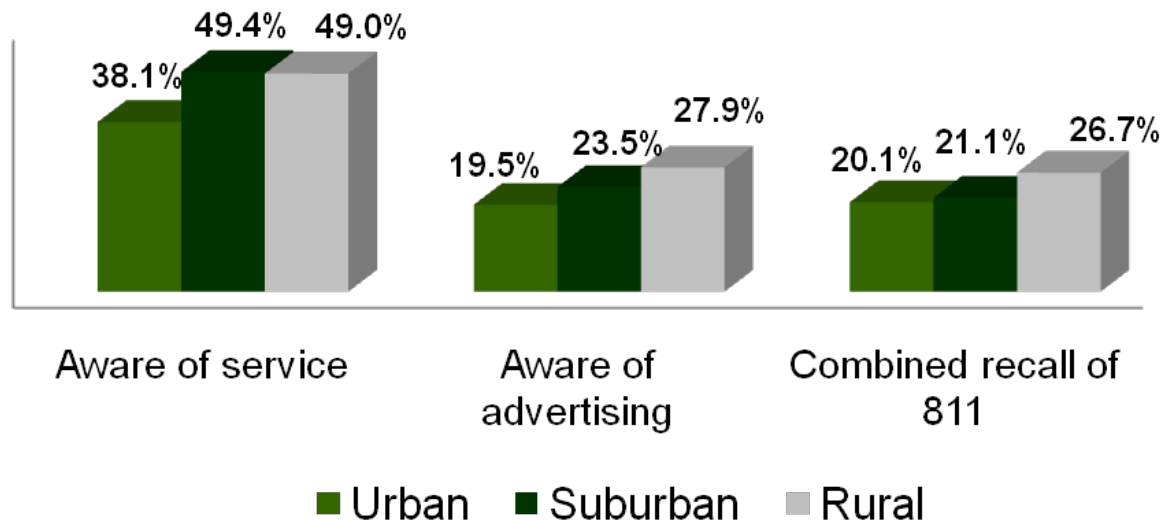
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Awareness levels

- Residents in urban areas have the lowest awareness levels.
- Residents in suburban and rural areas have similar awareness levels, although residents in rural areas are slightly more aware of the advertising and more likely to recall the 811 number.

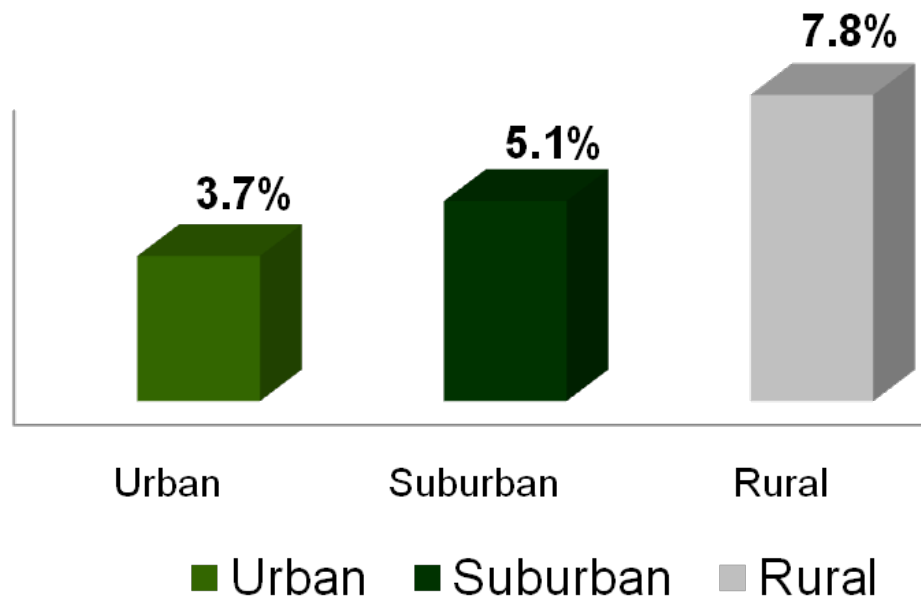
Note: Base was too low to measure unaided awareness by urban, suburban and rural area so unaided and aided recall have been combined.





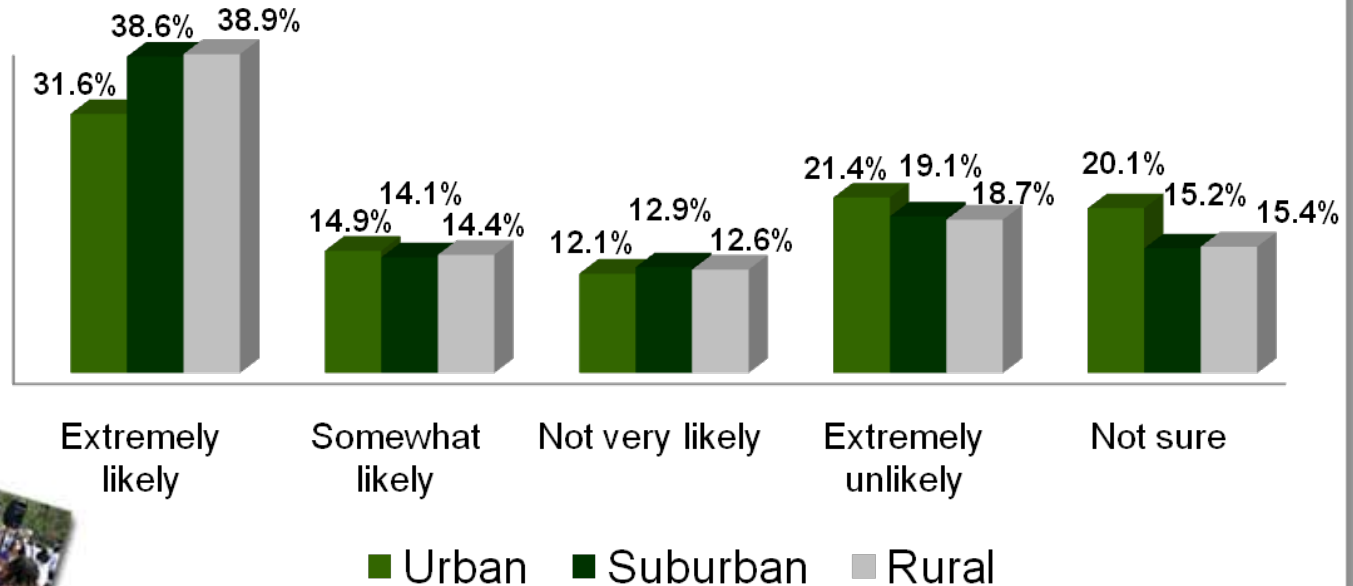
Have called 811 before

- Residents in rural areas are most likely to have called 811 before, while urban residents are the least likely.
- The chart shows percentage of all residents from the specific area.



Future intent to call 811

- There is no real difference between residents in suburban and rural area when it comes to likelihood of calling 811 before future digging projects.
- Urban residents are less likely to call 811 in the future but this is mostly driven by more of these residents being unsure of whether or not they will call.





Differences within age groups

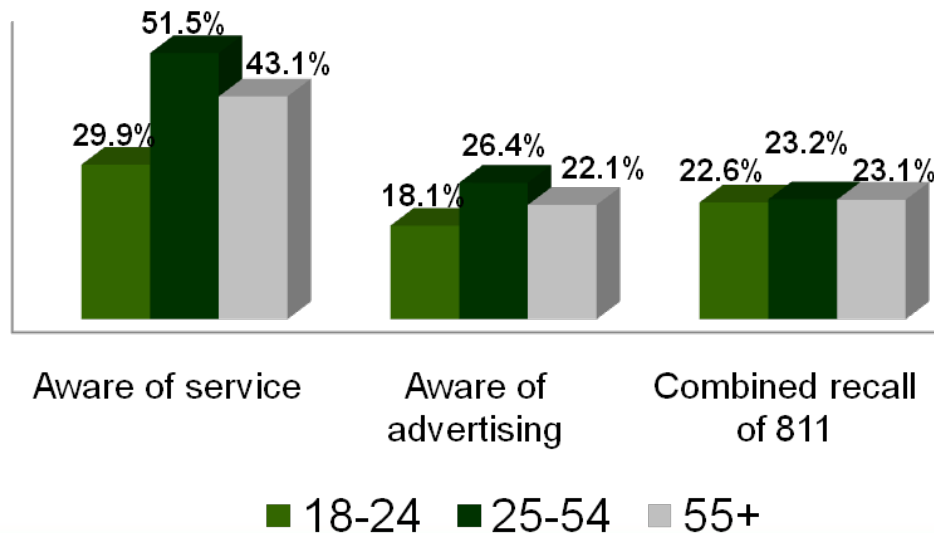


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Awareness levels

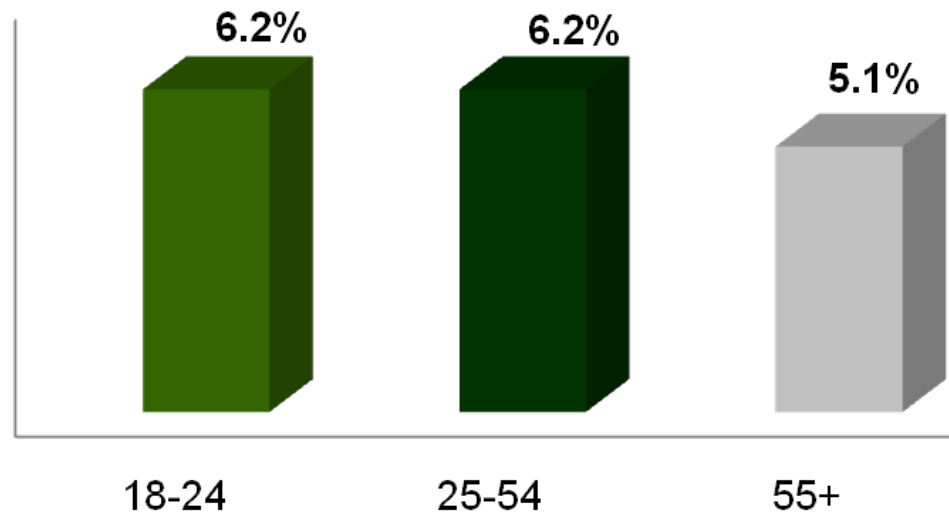
- Adults 25-54 have the highest awareness levels.
- Although young adults 18-24 are less likely to be aware of the service or to have seen or heard advertising for the 811 service, they are just as likely to recall the 811 number.
- The chart shows percentage of all respondents in the specific age group.

Note: Base was too low to measure unaided awareness by age so unaided and aided recall has been combined.



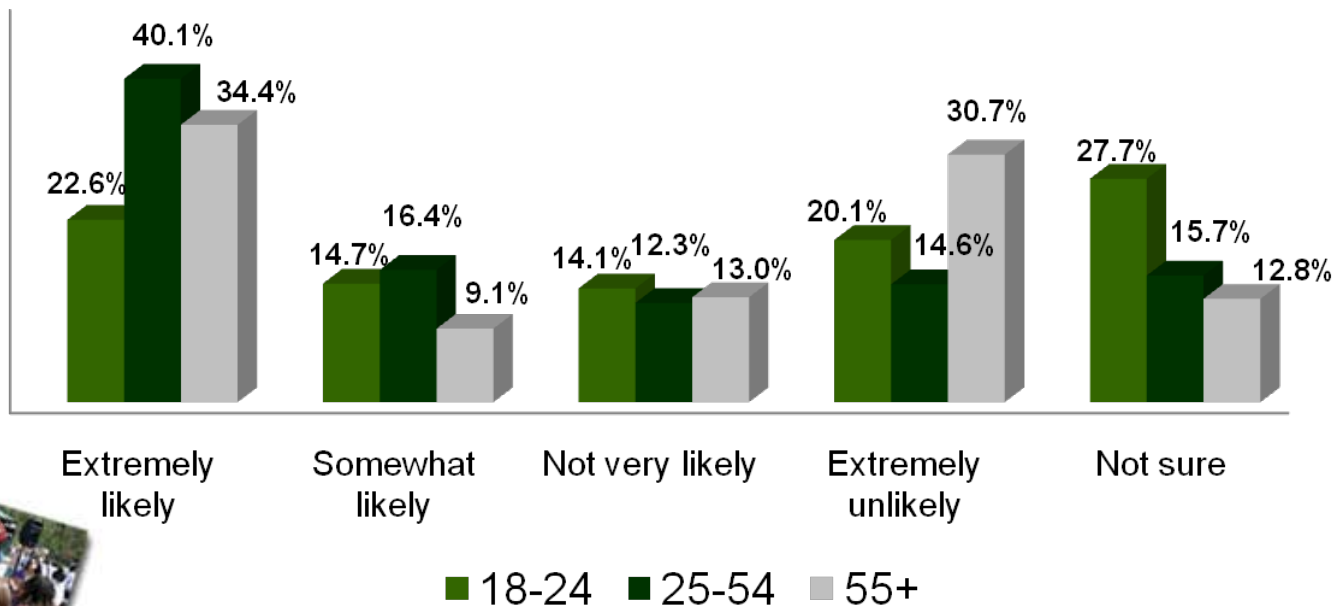
Have called 811 before

- There are no real difference between the age groups on their prior use of the 811 service.
- The chart shows percentage of all respondents in the specific age group.



Future intent to call 811

- Adults 25-54 are the most likely to call 811 before future digging projects with 56.5% either extremely or somewhat likely.
- Adults 55+ are the least likely to call with 43.7% either extremely unlikely or not very likely to call.





Differences by Gender

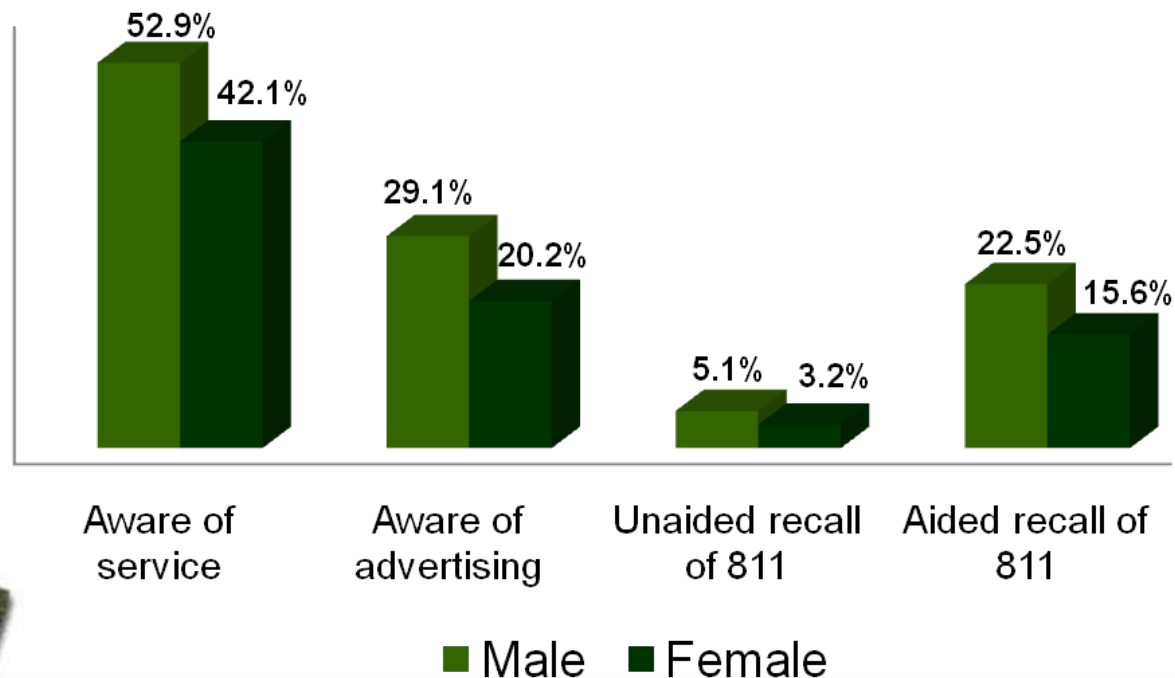


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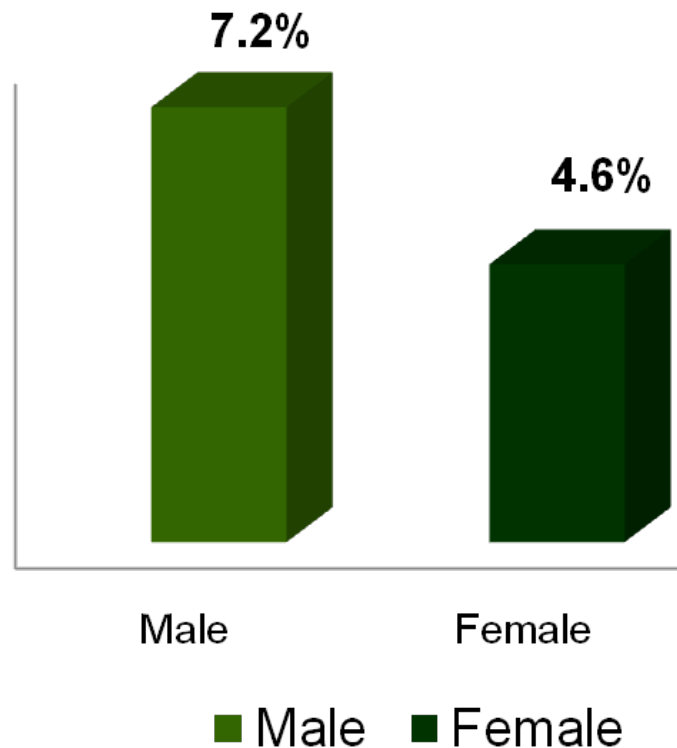
Awareness levels

- Males are more aware of both the service, advertising and the 811 number.
- The chart shows percent of all respondents of the specific gender.



Have called 811 before

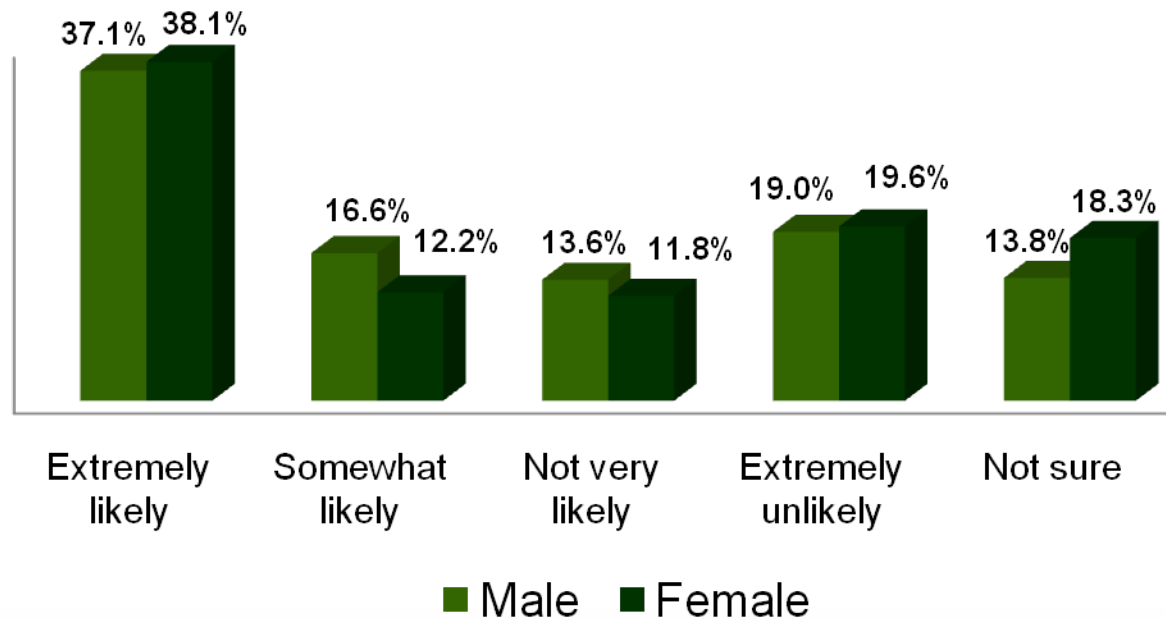
- Males are also more likely to have used the 811 service before.
- The chart shows percentage of all respondents by gender.



Future intent to call 811

- Although males are more aware of 811 and more likely to have called it in the past, females are almost as likely as males to call 811 before future digging projects with 50.3% females being either extremely or somewhat likely to call vs. 53.7% of males.

Note: The chart shows percent of all respondents of the specific gender.





Results from 2008 vs. 2010

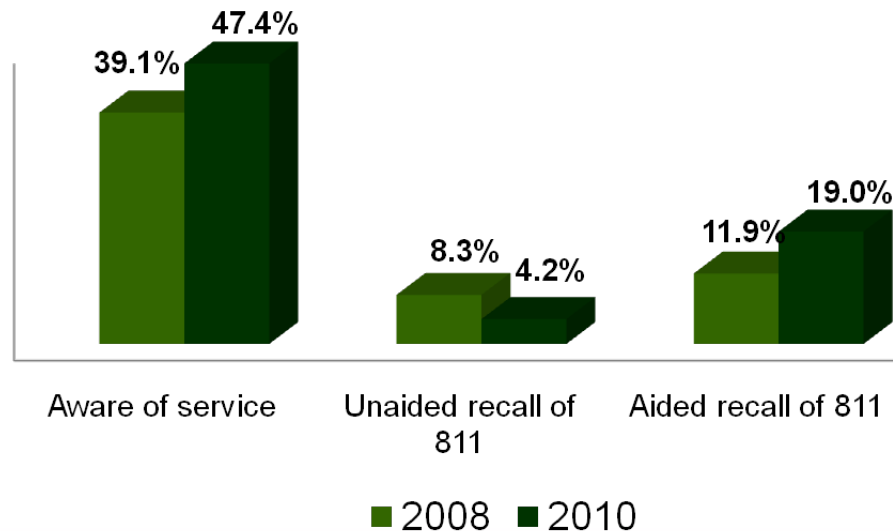


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Awareness Levels

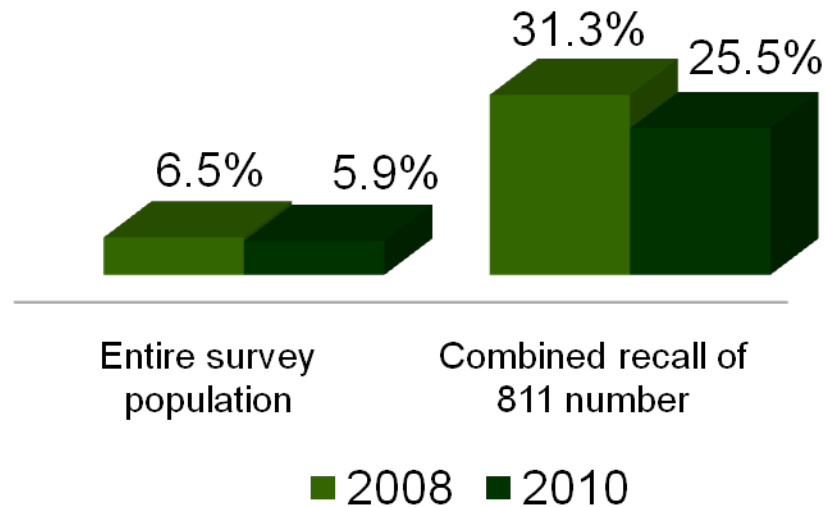
- General awareness of call-before-you-dig has increased 8% since 2008.
- Unaided recall of the 811 number has decreased but aided recall has increased 7% since 2008.
- When looking at overall recall of the 811 number (aided and unaided combined), recall has increased from 20.2% in 2008 to 23.2% in 2010.





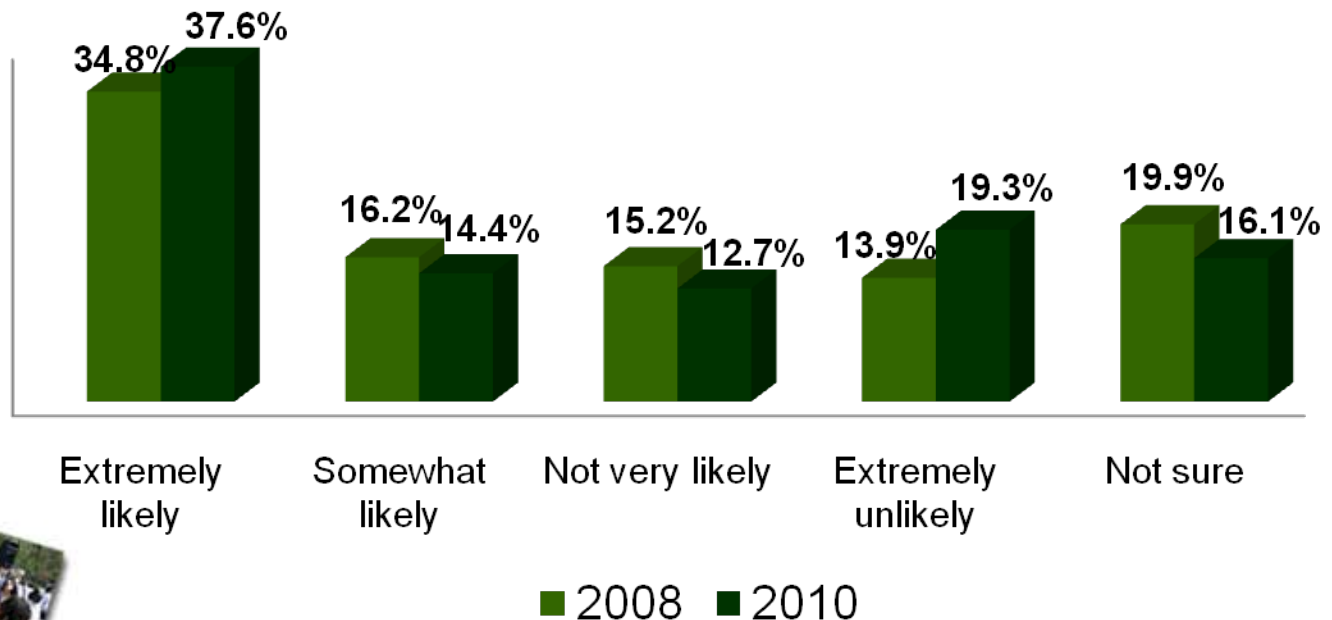
Have called 811 before

- The chart shows percentage of all survey respondents compared to the percentage of only respondents who recall the 811 number (aided or unaided).
- There is no real difference between percent of the survey population who had used the 811 service before in 2008 and in 2010.



Future intent to call 811

- Likelihood to call 811 before future digging projects has increased slightly.
- In 2008, 49.2% were either extremely or somewhat likely to call 811 in the future.
- In 2010, 52.0% were either extremely or somewhat likely to call 811 in the future





Conclusions and Next Steps



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Conclusions

- **Measurements of success:**
 - General awareness of call before you dig increased.
 - Overall awareness of 811 increased.
 - Awareness leads to action. Once people know about 811, they think they'll call in the future.



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Conclusions

- **Room for improvement:**
 - Unaided awareness decreased from 2008, although the difference is small and within the combined margin of error. Additionally, decreased awareness may coincide with a decrease in digging, as indicated in the 2009 DIRT Report.
 - **Opportunity:** Increased outreach to convert aided awareness into unaided awareness.
 - Future intent to call before digging is better than 50%, but it's roughly the same as it was in 2008.
 - **Opportunity:** Consider updates to 811 marketing materials, including using different messages for the various age, gender and regional subgroups.





Next steps

- State-level research, especially in states with stakeholders that have heavily promoted 811.
 - Research using identical questions and methodology is available. Price varies by state due to sample size differences, but ballpark price is \$8,000.
- Incorporate focus group testing of potential new 811 marketing materials using two types of groups:
 - People who plan to dig in the near future and plan on calling 811.
 - People who plan to dig in the near future and don't plan on calling 811.
- Determine if there are different motivators based on age, gender and regional differences and plan outreach campaigns accordingly.





Thank you



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